



# eScholar<sup>®</sup>

Bringing Data Together

## eScholar Uniq-ID<sup>®</sup>

## Person ID<sup>™</sup>

## User Guide

Version 2023

Last Updated: April 29, 2025

Bringing Data Together.

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**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.

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## • Overview

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- [Purpose](#)
- [Capabilities](#)
- [Benefits](#)
- [Definitions](#)
- [Feature Overview](#)
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- [Security](#)
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### **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	<p>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.</p> <p>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.</p>
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.

## Feature Overview

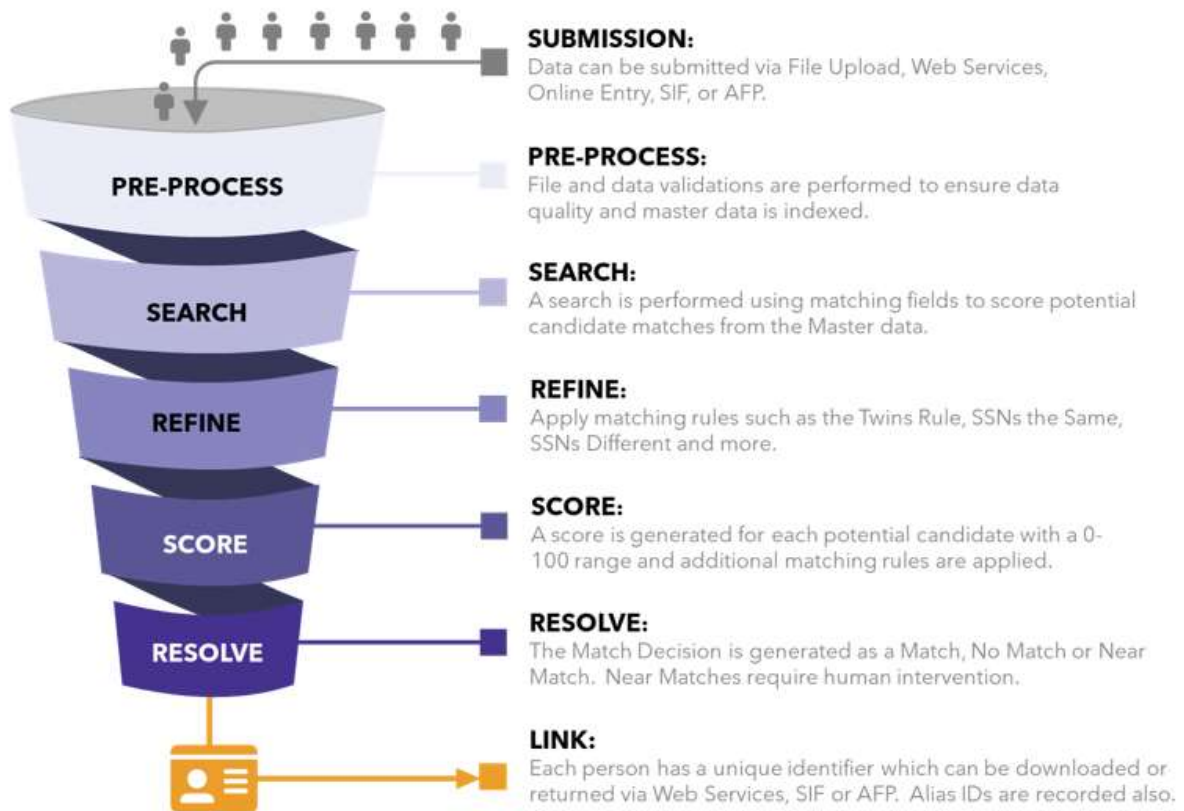
The table below provides an overview of each feature. Detailed information is provided within the chapters for each feature.

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

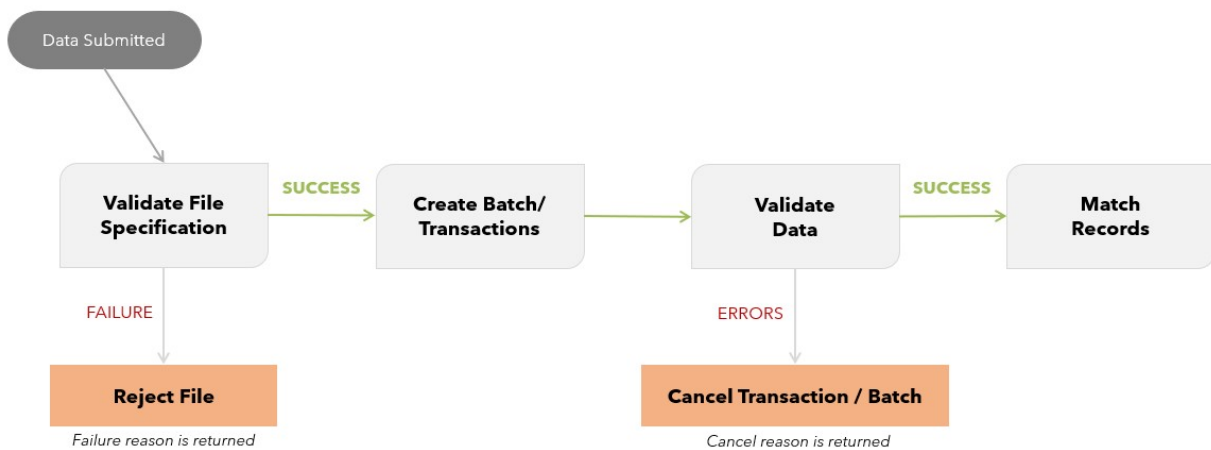


## 1. Submission (Initiated by a User)

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.

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## **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.

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## **System Requirements**

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

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## ■ Getting Started

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### *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.

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## 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.

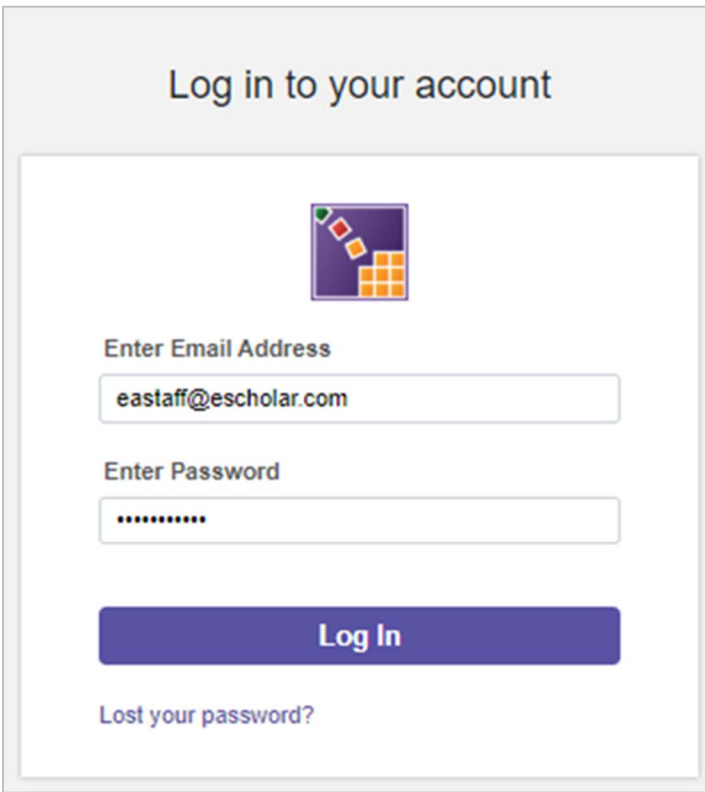
The account setup email will include the URL, or the URL can be given to the user by the System Administrator. When the UniqID URL is accessed, the application will display a Log In screen as shown below.

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.ldoe.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

Enter Password

**Log In**

[Lost your password?](#)

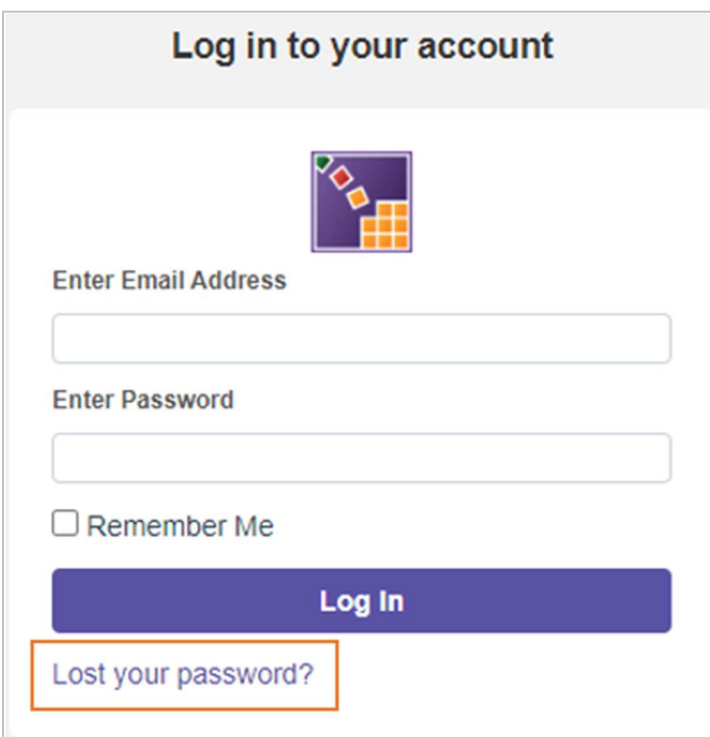
4. Click the Log In button.
5. The application will authenticate the email and password entered on the form. If the user is authorized to access the application, the UniqID Dashboard will be displayed for the authenticated user.
  - a. If the email or password is invalid or the user does not otherwise 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.lidoe.la.gov/uid/login>
2. Click the Lost your password? link on the Log In page.



The screenshot shows a login form titled "Log in to your account". It contains the following elements:

- A purple icon with a grid and a checkmark.
- A label "Enter Email Address" above a text input field.
- A label "Enter Password" above a text input field.
- A checkbox labeled "Remember Me".
- A blue button labeled "Log In".
- A link labeled "Lost your password?" which is highlighted with an orange rectangular border.

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.



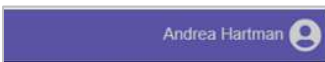
All screenshots shown in this document contain fake data. No real person data is displayed in any of the screenshots.


### Main Header (Main Navigation)

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


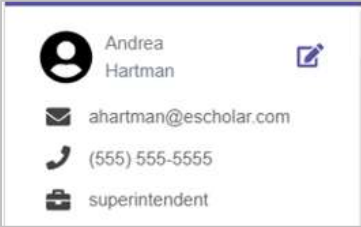

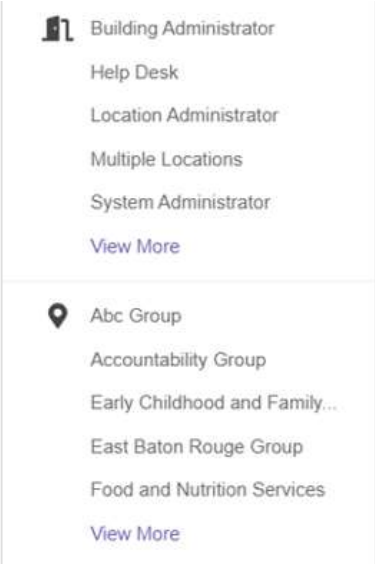
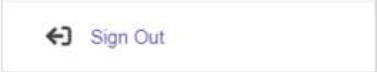


### User Information



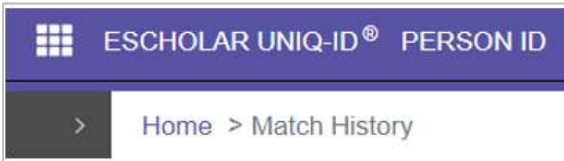
Click the person image in the top right to get to the User Information section. The User Information section includes the email address, phone number, roles, and groups for the user and a Sign-Out link. If authorized, the user can click the Edit Icon (  ) to update user profile details.



Icon/Image(s)	
 <p>A horizontal blue bar containing the name "Andrea Hartman" and a small circular profile icon on the right.</p>	<p>Lists the full name of the user.</p>
 <p>A vertical card showing a profile picture, name "Andrea Hartman", email "ahartman@escholar.com", phone "(555) 555-5555", and role "superintendent". An edit icon is in the top right.</p>	<p>Displays user first and last name, email address, and phone number (if available).</p> <p>The Edit icon (  ) will be available for users who can edit User Profiles.</p>
 <p>A list of roles and groups. Roles include Building Administrator, Help Desk, Location Administrator, Multiple Locations, System Administrator, and View More. Groups include ABC Group, Accountability Group, Early Childhood and Family..., East Baton Rouge Group, Food and Nutrition Services, and View More.</p>	<p>Displays the user's Roles and Groups.</p>
 <p>A button with a left-pointing arrow icon and the text "Sign Out".</p>	<p>Includes a Sign-Out button.</p>

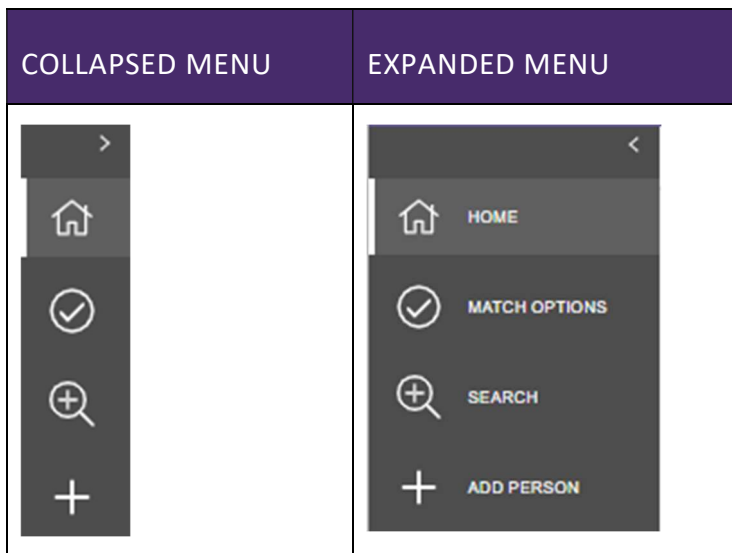
**Breadcrumbs (Navigation Path)**

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.

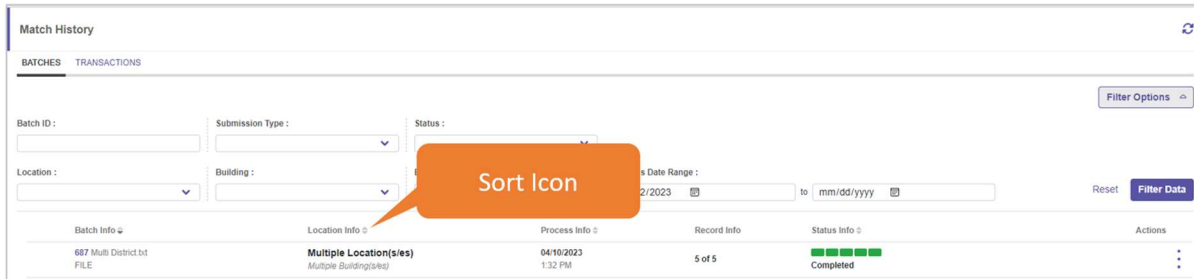
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## Lesson: How to Sort Data


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.

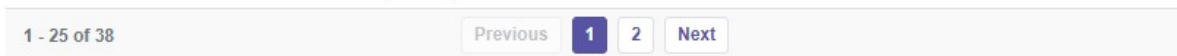


The screenshot shows the 'Match History' interface with a data grid. The grid has columns: Batch Info, Location Info, Process Info, Record Info, Status Info, and Actions. The 'Location Info' column header has a sort icon (a diamond with a vertical line) next to it, which is highlighted by an orange callout box labeled 'Sort Icon'. The data row shows '687 Multi District bt FILE' for Batch Info, 'Multiple Location(s/es) Multiple Building(s/es)' for Location Info, '04/10/2023 1:32 PM' for Process Info, '5 of 5' for Record Info, and 'Completed' for Status Info.

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.



The screenshot shows the pagination controls at the bottom of the data grid. It displays '1 - 25 of 38' records. There are four buttons: 'Previous', '1', '2', and 'Next'. The '1' button is highlighted in blue, indicating the current page.
















## 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.bt File	<b>Acadia Parish (027)</b> Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	 Pending: Request Queued	Refresh 
 922 UID_922.bt File	<b>Acadia Parish (027)</b> Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	 Pending: In Progress	Refresh 
 921 UID_921.bt File	<b>Acadia Parish (027)</b> Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	 Pending: In Progress	Refresh 
 920 UID_920.bt File	<b>Acadia Parish (027)</b> Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	 Pending: Near Matches	Resolve 
 918 AFP	<b>Multiple Districts</b> 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	<b>Acadia Parish (027)</b> 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

**Filters**

Batch ID:

Submission Type: FILE













Status: Near Matches

Location:

Building:

Enrollment Year (School Year): 2023

Process Date Range: 03/12/2023 to mm/dd/yyyy

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
 47 Duid upid file 1-High ... FILE	<b>Multiple Location(s/es)</b> Multiple Building(s/es)	03/22/2023 1:56 PM	1 of 3 PENDING	 Pending: Near Match TESTING(s/es)	Resolve 
 343 Advanced-Test2.bt FILE	<b>Multiple Location(s/es)</b> Multiple Building(s/es)	03/31/2023 9:35 AM	1 of 3 PENDING	 Pending: Near Match TESTING(s/es)	Resolve 
 344 Advanced-Test2.bt FILE	<b>Multiple Location(s/es)</b> Multiple Building(s/es)	03/31/2023 10:12 AM	1 of 3 PENDING	 Pending: Near Match TESTING(s/es)	Resolve 
 652 Advanced-Test2.bt FILE	<b>Multiple Location(s/es)</b> 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.

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## Home/Dashboard

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### *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.

The screenshot shows the dashboard interface for eScholar Uniq-ID Person ID. The top navigation bar includes the logo, user name 'Andrea Hartman', and a home button. The main content area is divided into several sections:

- System Message:** A message reminding users to submit person records by 08/02/2023 and resolve near matches by 08/25/2023. A 'View More' link is provided.
- Pending Work:** A summary box showing 44 Pending Near Matches and 4 Pending Batches.
- Quick Actions:** A list of actions: Add a Person, Upload a File, and Perform a Search.
- Recent Activity (Past 30 Days):** A table with tabs for Batches and Transactions. It shows 5 most recent pending items with columns for Batch Info, Location Info, Process Info, Record Info, Status Info, and Actions.

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	<b>44</b>
<hr/>	
Pending Batches	<b>4</b>

## Quick Actions Panel

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

Quick Actions	
	Add a Person
	Upload a File
	Perform a Search



## 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

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

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
925 UID_S.bt File	Acadia Parish (027) <i>Brownfields Elementary School (027018)</i>	04/06/2020 3:00 PM	2 of 2 PENDING	<div style="display: flex; width: 100px; height: 10px; background-color: #ccc; border: 1px solid #ccc;"><div style="width: 100%; background-color: #28a745;"></div></div> Pending: Request Queued	Refresh ⋮
922 UID_922.bt File	Acadia Parish (027) <i>Brownfields Elementary School (027018)</i>	04/05/2020 3:00 PM	1 of 3 PENDING	<div style="display: flex; width: 100px; height: 10px; background-color: #ccc; border: 1px solid #ccc;"><div style="width: 100%; background-color: #28a745;"></div></div> Pending: In Progress	Refresh ⋮
921 UID_921.bt File	Acadia Parish (027) <i>Brownfields Elementary School (027018)</i>	04/05/2020 3:00 PM	1 of 2 PENDING	<div style="display: flex; width: 100px; height: 10px; background-color: #ccc; border: 1px solid #ccc;"><div style="width: 100%; background-color: #28a745;"></div></div> Pending: In Progress	Refresh ⋮
920 UID_920.bt File	Acadia Parish (027) <i>Brownfields Elementary School (027018)</i>	04/03/2020 3:00 PM	1 of 1000 PENDING	<div style="display: flex; width: 100px; height: 10px; background-color: #ccc; border: 1px solid #ccc;"><div style="width: 100%; background-color: #28a745;"></div></div> Pending: Near Matches	Resolve ⋮
918 AFP	Multiple Districts <i>Multiple Schools</i>	04/02/2020 3:00 PM	1000 of 190,002 PENDING	<div style="display: flex; width: 100px; height: 10px; background-color: #ccc; border: 1px solid #ccc;"><div style="width: 100%; background-color: #28a745;"></div></div> Pending: Near Matches	Resolve ⋮

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


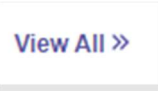
Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
1003 Search	Acadia Parish (027) <i>Brownfields Elementary School (027018)</i>	07/27/2022 3:00 PM	1 of 1	<div style="display: flex; width: 100px; height: 10px; background-color: #28a745; border: 1px solid #28a745;"></div> Completed	⋮
1002 AFP	East Baton Rouge Parish (017) <i>Multiple Schools</i>	04/06/2020 3:00 PM	1,000 of 1,000	<div style="display: flex; width: 100px; height: 10px; background-color: #28a745; border: 1px solid #28a745;"></div> Completed	⋮
1001 AFP	Acadia Parish (027) <i>Multiple Schools</i>	04/06/2020 3:00 PM	2,000 of 2,000	<div style="display: flex; width: 100px; height: 10px; background-color: #28a745; border: 1px solid #28a745;"></div> 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.
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	Includes counts to help determine progress of the Batch. The Status will

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
	Count of total records in the Batch Status	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		<ul style="list-style-type: none"> <li>• Dropdown Menu: Click to view more actions.               <ul style="list-style-type: none"> <li>○ Continue</li> <li>○ Refresh</li> <li>○ Resolve</li> <li>○ View</li> <li>○ Download</li> <li>○ View Batch Details</li> </ul> </li> </ul>
	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

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
		Completed). Refer to 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

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**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	<div style="display: flex; gap: 5px;"><div style="width: 100%; height: 10px; background-color: #28a745;"></div><div style="width: 20%; height: 10px; background-color: #ffc107;"></div></div> Pending: In Progress	Refresh ⋮
12316 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	921	<div style="display: flex; gap: 5px;"><div style="width: 100%; height: 10px; background-color: #28a745;"></div><div style="width: 20%; height: 10px; background-color: #ffc107;"></div></div> Pending: In Progress	Refresh ⋮
12314 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	<div style="display: flex; gap: 5px;"><div style="width: 100%; height: 10px; background-color: #28a745;"></div><div style="width: 20%; height: 10px; background-color: #ffc107;"></div></div> Pending: Near Matches	Resolve ⋮
12313 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	<div style="display: flex; gap: 5px;"><div style="width: 100%; height: 10px; background-color: #28a745;"></div><div style="width: 20%; height: 10px; background-color: #ffc107;"></div></div> Pending: Near Matches	Resolve ⋮
12311 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/02/2020 3:00 PM	918	<div style="display: flex; gap: 5px;"><div style="width: 100%; height: 10px; background-color: #28a745;"></div><div style="width: 20%; height: 10px; background-color: #ffc107;"></div></div> Pending: Near Matches	Resolve ⋮

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**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	<div style="display: flex; gap: 5px;"><div style="width: 100%; height: 10px; background-color: #28a745;"></div></div> Completed	⋮
12333 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	1002	<div style="display: flex; gap: 5px;"><div style="width: 100%; height: 10px; background-color: #28a745;"></div></div> Completed	⋮
12332 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	1002	<div style="display: flex; gap: 5px;"><div style="width: 100%; height: 10px; background-color: #28a745;"></div></div> Completed	⋮

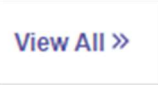


**REFRESHER:** A Transaction is created for each record that is processed by the application. A Transaction is created when records are submitted to the assignment process, including Upload File, Add a Person, AFP, SIF and via APIs.

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

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
		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		<ul style="list-style-type: none"> <li>• Dropdown Menu: Click to view more actions.                             <ul style="list-style-type: none"> <li>○ Continue</li> <li>○ Refresh</li> <li>○ Resolve</li> <li>○ View</li> <li>○ Download</li> <li>○ View Transaction Details</li> </ul> </li> </ul>
<a href="#">View Past 7 Days</a>	View Past 7 Days	When clicked, the “View Past 7 Days” link will navigate to the Match History

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
		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

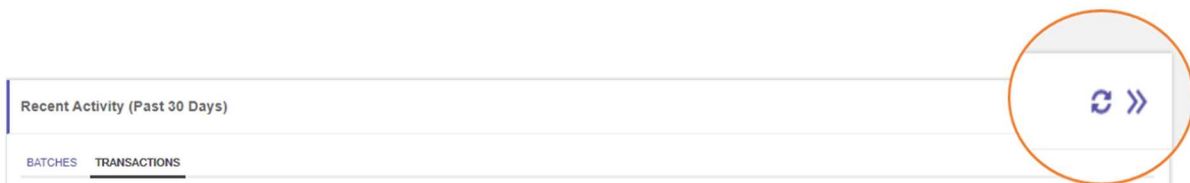
Each Transaction/Batch will also include an Actions column which will direct the user to the next steps within the application. If the Transaction/Batch is in the Pending section, a next action link will be available. This next action will navigate the user to the appropriate action for that Transaction/Batch.

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

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



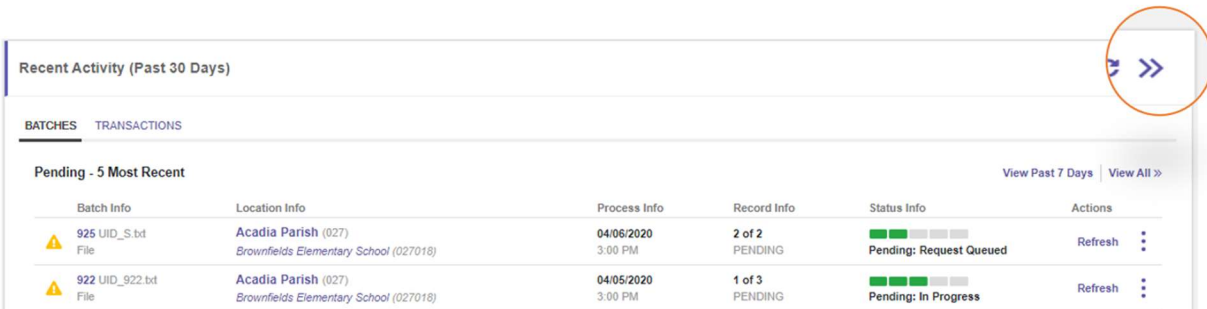
3. The Recent Activity panel will update the status information for the pending Transactions or Batches.
  - a. When the refresh is completed, some Transactions or Batches may transition to the Completed stage and will be displayed in the Completed section.

## Lesson: How to Drill into Match History

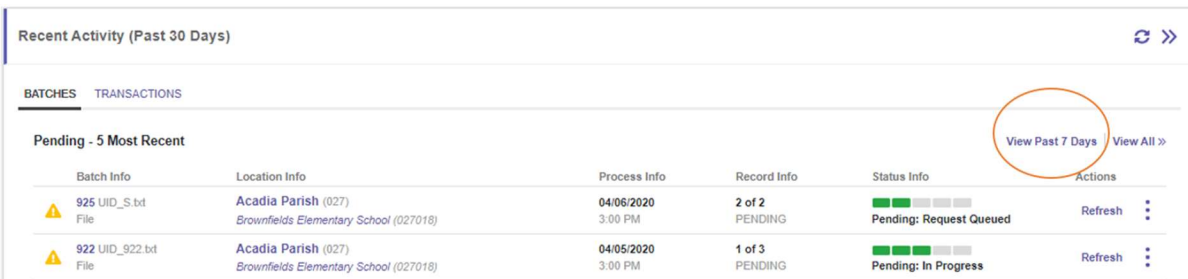
1. On the Dashboard, find the Recent Activity panel.

2. Click on icon or links below to navigate to Match History.

- a. Drill in Icon on Recent Activity panel header. The system will display the complete history of batches from the past 30 days.



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



- 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.bt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	<div style="width: 100%; height: 10px; background-color: green;"></div> Pending: Request Queued	Refresh <span style="font-size: 0.8em;">⋮</span>
922 UID_922.bt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	<div style="width: 100%; height: 10px; background-color: green;"></div> Pending: In Progress	Refresh <span style="font-size: 0.8em;">⋮</span>

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

Filter Options ⌵

Batch ID :

Submission Type :

Status :

District :

School :

Enrollment Year(School Year) :

Process Date Range :  X to

Reset **Filter Data**

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
925 UID_S.bt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	<div style="width: 100%; height: 10px; background-color: green;"></div> Pending: Queued	Refresh <span style="font-size: 0.8em;">⋮</span>
922 UID_922.bt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	<div style="width: 100%; height: 10px; background-color: green;"></div> Pending: In Progress	Refresh <span style="font-size: 0.8em;">⋮</span>
921 UID_921.bt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	<div style="width: 100%; height: 10px; background-color: green;"></div> Pending: In Progress	Refresh <span style="font-size: 0.8em;">⋮</span>
920 UID_920.bt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	<div style="width: 100%; height: 10px; background-color: green;"></div> Pending: Near Matches	Resolve <span style="font-size: 0.8em;">⋮</span>


- a. 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.
- b. 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.









- c. 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.
- d. 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 :
<input type="text"/>	<input type="text" value="920"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="State ID"/>
District :	School :	School Year :	Process Date Range :	Sort By :	
<input type="text"/>	<input type="text"/>	<input type="text" value="2020"/>	<input type="text" value="04/06/2020"/> X to <input type="text"/>	<input type="text" value="Max Match Score Desc"/>	

Reset Filter Data

Pending Near Matches

Submission Record <b>Oliver Jones</b> Acadia Parish (027) Brownfields Elementary School (027018)	Date of Birth: <b>09/23/2001</b> Grade: <b>Undergraduate</b> Local ID: <b>12345</b>	Race: <b>White</b> Gender: <b>Male</b> Social Security Number: <b>098-12-1133</b>	 Max Match Score	<b>4</b> 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** 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	<span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: gray;">■</span> <span style="color: gray;">■</span> Pending: Request Queued	Refresh <span style="font-size: 0.8em;">⋮</span>
922 UID_922.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	<span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: gray;">■</span> Pending: In Progress	Refresh <span style="font-size: 0.8em;">⋮</span>
921 UID_921.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	<span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: gray;">■</span> Pending: In Progress	Refresh <span style="font-size: 0.8em;">⋮</span>
920 UID_920.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	<span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: gray;">■</span> Pending: Near Matches	Resolve <span style="font-size: 0.8em;">⋮</span>
918 AFP	Multiple Districts Multiple Schools	04/02/2020 3:00 PM	1000 of 190,002 PENDING	<span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: gray;">■</span> Pending: Near Matches	Resolve <span style="font-size: 0.8em;">⋮</span>

**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	<span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: green;">■</span> Completed	<span style="font-size: 0.8em;">⋮</span>

3. 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	<span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: gray;">■</span> <span style="color: gray;">■</span> Pending: Request Queued	Refresh <span style="font-size: 0.8em;">⋮</span>
922 UID_922.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	<span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: gray;">■</span> Pending: In Progress	Refresh <span style="font-size: 0.8em;">⋮</span>
<b>921 UID_921.txt</b> File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	<span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: gray;">■</span> Pending: In Progress	Refresh <span style="font-size: 0.8em;">⋮</span>
920 UID_920.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	<span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: gray;">■</span> Pending: Near Matches	Resolve <span style="font-size: 0.8em;">⋮</span>
918 AFP	Multiple Districts Multiple Schools	04/02/2020 3:00 PM	1000 of 190,002 PENDING	<span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: green;">■</span> <span style="color: gray;">■</span> Pending: Near Matches	Resolve <span style="font-size: 0.8em;">⋮</span>

4. 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.

**Status Statistics**

Match Status	Record Count
<b>Ready to Assign IDs</b>	
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

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## 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 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
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	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	Pending: Near Matches	Resolve
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
<input checked="" type="radio"/> Near Match	04/23/2020 13:48	2	2
<input type="radio"/> 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_131462_1de_pem.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**

Pending: 20 Uniq-ID Element AFP View Past 7 Days | View All >>

	Location Info	Process Info	Batch ID	Status Info	Actions
<b>12325 UID_923.txt</b> File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	923	<div style="width: 100%; height: 10px; background-color: green;"></div> Pending: In Progress	Refresh <span style="font-size: 0.8em;">⋮</span>
12324 UID_923.txt	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	921	<div style="width: 100%; height: 10px; background-color: green;"></div> Pending: In Progress	Refresh <span style="font-size: 0.8em;">⋮</span>
⚠️ 12314 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	<div style="width: 100%; height: 10px; background-color: green;"></div> Pending: Near Matches	Resolve <span style="font-size: 0.8em;">⋮</span>
⚠️ 12313 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	<div style="width: 100%; height: 10px; background-color: green;"></div> Pending: Near Matches	Resolve <span style="font-size: 0.8em;">⋮</span>

- 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

PERSON **DETAILS** DOWNLOAD

**Tabs**

**Process Details**  
Displays details about processing.

**Processing Information**

**Status Statistics**

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

**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

1. On the Dashboard, find the Recent Activity panel.
2. 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**

Pending Uniq-ID Assignment View Past 7 Days | View All >>

Transaction ID	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	<span style="color: green;">■ ■ ■ ■ ■</span> Pending: In Progress	Refresh <span style="font-size: 0.8em;">⋮</span>
12324 UID_923.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	921	<span style="color: green;">■ ■ ■ ■ ■</span> Pending: In Progress	Refresh <span style="font-size: 0.8em;">⋮</span>
12314 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	<span style="color: green;">■ ■ ■ ■ ■</span> Pending: Near Matches	Resolve <span style="font-size: 0.8em;">⋮</span>
12313 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	<span style="color: green;">■ ■ ■ ■ ■</span> Pending: Near Matches	Resolve <span style="font-size: 0.8em;">⋮</span>

3. The application will display the selected Transaction Profile.
4. 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	<span style="color: green;">■ ■ ■ ■ ■</span> 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

5. The application will display the Download Tab page which includes the Download Options form and a Download History panel.
6. 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

PERSON    DETAILS    **DOWNLOAD**

**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
Robert.Johnson@school2.edu	04/20/2020 11:46:02 AM
swilton@school2.edu	04/19/2020 09:10:00 AM
Robert.Johnson@school2.edu	04/18/2020 01:34:11 PM

7. Click the Generate Extract button.
8. 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	<b>Acadia Parish (027)</b> Brownfields Elementary School	04/05/2020 3:00 PM	923	<span style="color: green;">■ ■ ■ ■ ■</span> Pending: In Progress	Refresh <span>⋮</span>
12316 File	<b>Acadia Parish (027)</b> Brownfields Elementary School	04/05/2020 3:00 PM	921	<span style="color: green;">■ ■ ■ ■ ■</span> Pending: In Progress	Refresh <span>⋮</span>
12314 File	<b>Acadia Parish (027)</b> Brownfields Elementary School	04/03/2020 3:00 PM	920	<span style="color: green;">■ ■ ■ ■ ■</span> Pending: Near Matches	Resolve <span>⋮</span>

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**

**General Information**

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

**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

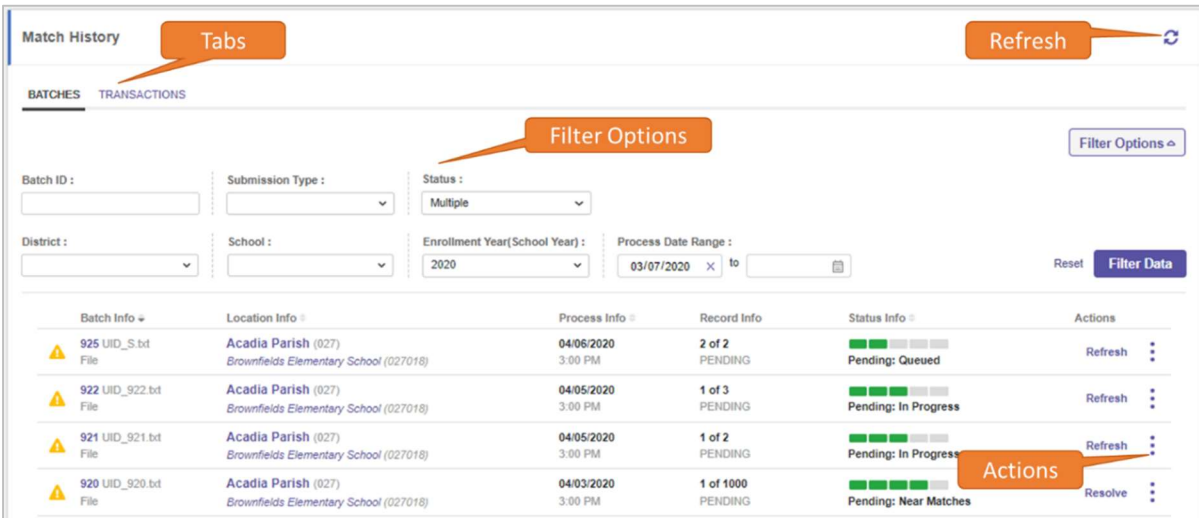
---

### *Chapter Highlights*

- [Overview](#)
- [Filter](#)
- [Batches 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**

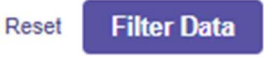
The Match History page enables users to view all Transactions or Batches that have been processed, refresh the page, filter, sort, and perform actions on the Transactions/Batches. Users can view the Transactions and Batches based upon the Data Authorization rules, such as the associated locations.



## Filter

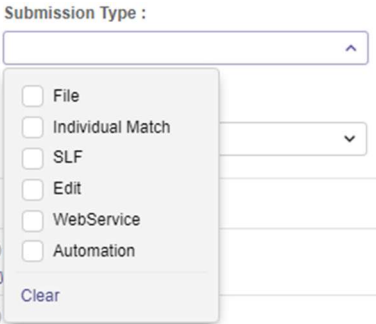
The Filter Option on the Match History page enables filtering of the Transactions data grid to help find a specific Transaction or group of Transactions. The Filter Options are described below:

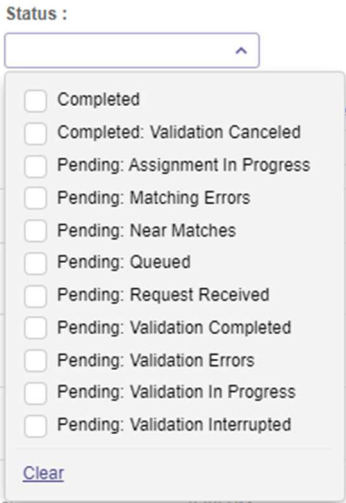
OPTION	DESCRIPTION
	When this button is displayed (arrow pointing up), the Filter Options are expanded. To collapse the Filter Options, click the Filter Options button.
	When this button is displayed (arrow pointing down), the Filter Options are collapsed. To expand the Filter Options, click the Filter Options button.

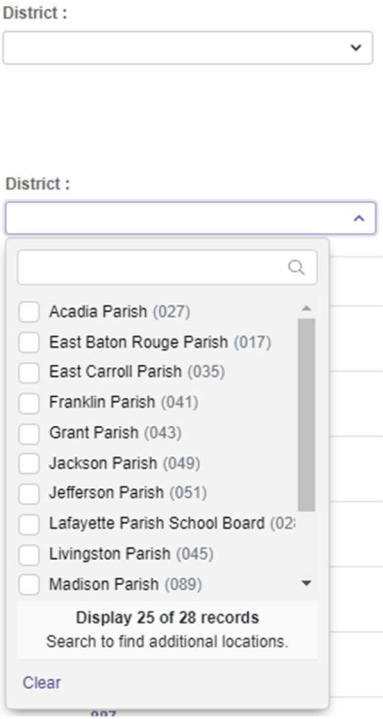
OPTION	DESCRIPTION
 A screenshot showing a 'Reset' link and a blue 'Filter Data' button. The 'Reset' text is in a light blue font, and the 'Filter Data' text is in white on a blue button background.	<p>When the Filter Options is expanded a Reset link and a Filter Data button will be displayed. To reset the filter criteria, click the Reset link. To filter the data grid based on the selected criteria, click the Filter Data button.</p>

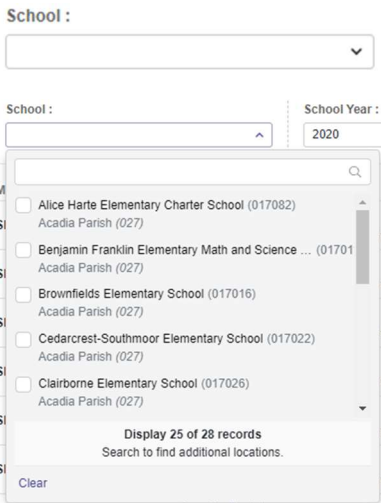
The following filter criteria is available in Filter Options:

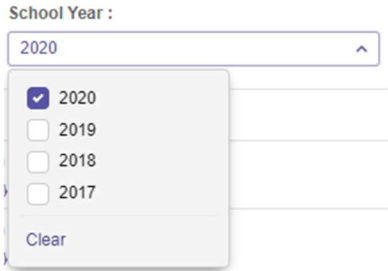

FIELDS/DATA	EXAMPLE IMAGE	DESCRIPTION
Transaction ID	<p>Transaction ID :</p> <input data-bbox="461 688 823 722" type="text"/>	<p>Each Transaction is assigned a unique Transaction identifier. This filter field will restrict the results to the specific Transaction ID entered in this field.</p> <p>To filter on a Transaction ID, enter the ID in the Transaction ID field.</p>
Batch ID	<p>Batch ID :</p> <input data-bbox="456 1251 824 1285" type="text"/>	<p>Each Batch is assigned a unique Batch identifier. This filter field will restrict the results to the specific Batch ID entered in this field.</p> <p>To filter on a Batch ID, enter the ID in the Batch ID field.</p>

FIELDS/DATA	EXAMPLE IMAGE	DESCRIPTION
<p>Submission Type</p>		<p>The Submission Type filter will list all the Submission Type options available to the user. This may include:</p> <ul style="list-style-type: none"> <li>▪ File</li> <li>▪ Individual Match</li> <li>▪ SLF</li> <li>▪ Edit</li> <li>▪ Web Services</li> <li>▪ Automation</li> </ul> <p>To filter on one or more of the options, click the selection box(es) to the left of the name.</p> <p>To clear all selected options, click the Clear link.</p>

FIELDS/DATA	EXAMPLE IMAGE	DESCRIPTION
<p>Status</p>		<p>The Status filter will list all the Status options. This may include:</p> <ul style="list-style-type: none"> <li>▪ Completed: Validation Canceled</li> <li>▪ Pending: Assignment In Progress</li> <li>▪ Pending: Matching Errors</li> <li>▪ Pending: Near Matches</li> <li>▪ Pending: Queued</li> <li>▪ Pending: Request Received</li> <li>▪ Pending: Validation Completed</li> <li>▪ Pending: Validation Errors</li> <li>▪ Pending: Validation In Progress</li> <li>▪ Pending: Validation Interrupted</li> </ul>

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

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

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

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			
<b>Pending - 5 Most Recent</b>					
					<a href="#">View Past 7 Days</a>   <a href="#">View All &gt;&gt;</a>
Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
925 UID_S.td 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.td 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.td 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.td 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
<b>Completed - 5 Most Recent</b>					
					<a href="#">View Past 7 Days</a>   <a href="#">View All &gt;&gt;</a>
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.

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
		The Batch ID will be a hyperlink to the 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 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.

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Actions		<ul style="list-style-type: none"> <li>• Dropdown Menu: Click to view more actions.                             <ul style="list-style-type: none"> <li>○ Continue</li> <li>○ Refresh</li> <li>○ Resolve</li> <li>○ View</li> <li>○ Download</li> <li>○ View Batch Details</li> </ul> </li> </ul>






## 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	<div style="width: 100%; height: 10px; background-color: #28a745;"></div> Pending: In Progress	Refresh ⋮
 12316 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	921	<div style="width: 100%; height: 10px; background-color: #28a745;"></div> Pending: In Progress	Refresh ⋮
 12314 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	<div style="width: 100%; height: 10px; background-color: #28a745;"></div> Pending: Near Matches	Resolve ⋮
 12313 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	<div style="width: 100%; height: 10px; background-color: #28a745;"></div> Pending: Near Matches	Resolve ⋮
 12311 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/02/2020 3:00 PM	918	<div style="width: 100%; height: 10px; background-color: #28a745;"></div> 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	<div style="width: 100%; height: 10px; background-color: #28a745;"></div> Completed	⋮
12333 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	1002	<div style="width: 100%; height: 10px; background-color: #28a745;"></div> Completed	⋮
12332 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	1002	<div style="width: 100%; height: 10px; background-color: #28a745;"></div> Completed	⋮

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

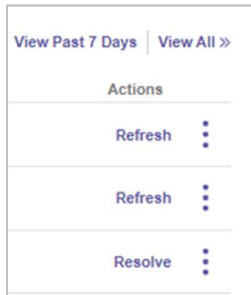
COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Alert	Icon 	If a Transaction is in a Pending state, the yellow exclamation icon will be displayed to alert the user of the Pending status.

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, AFP or Individual Match.  The Transaction ID will be a hyperlink to the 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

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
		Transaction and the text of the Status.
Actions		<ul style="list-style-type: none"> <li>• Dropdown Menu: Click to view more actions.               <ul style="list-style-type: none"> <li>○ Continue</li> <li>○ Refresh</li> <li>○ Resolve</li> <li>○ View</li> <li>○ Download</li> <li>○ View Transaction Details</li> </ul> </li> </ul>

## 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.


The screenshot shows the 'Match History' interface with the following components:

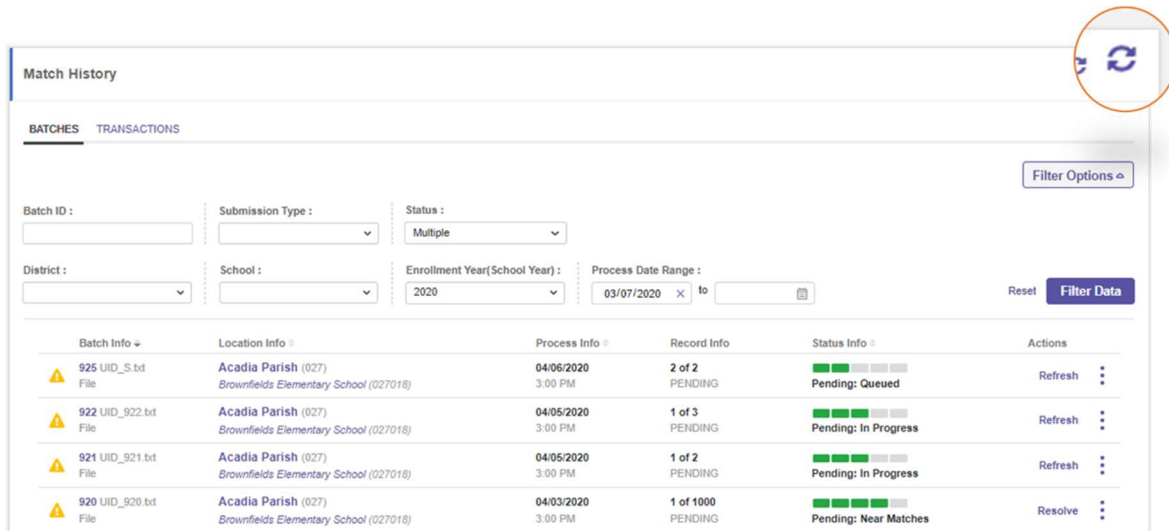
- Filter Criteria:** Includes fields for Batch ID, Submission Type, Status (set to 'Multiple'), District, School, Enrollment Year (set to '2020'), and Process Date Range (set to '03/07/2020').
- Filter Options:** A 'Filter Options' button with a dropdown arrow.
- Filter Data or Reset:** A 'Filter Data' button and a 'Reset' link.
- Data Grid:** A table with columns: Batch Info, Location Info, Process Info, Record Info, Status Info, and Actions. It contains four rows of data for different batches.

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

3. Click the Filter Data button to filter the data grid results.
4. 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.

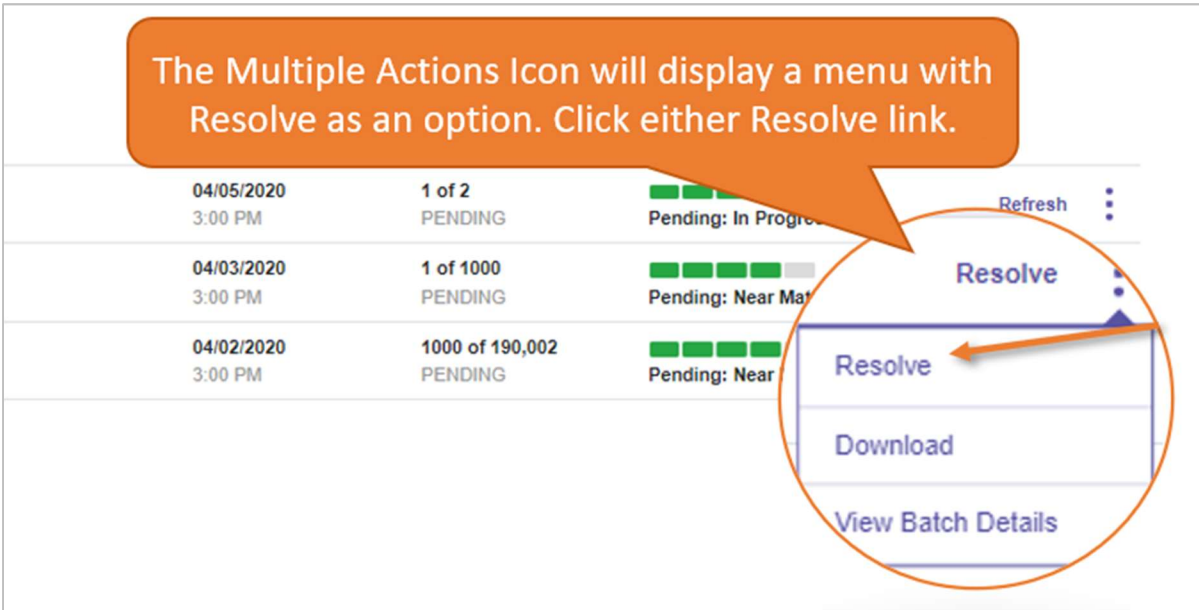


The screenshot shows the 'Match History' interface. At the top right, a refresh icon (a circular arrow) is circled in red. Below the header, there are filter options for 'BATCHES' and 'TRANSACTIONS'. The main area contains a table with columns: Batch Info, Location Info, Process Info, Record Info, Status Info, and Actions. The table lists four batches with their respective details and actions.

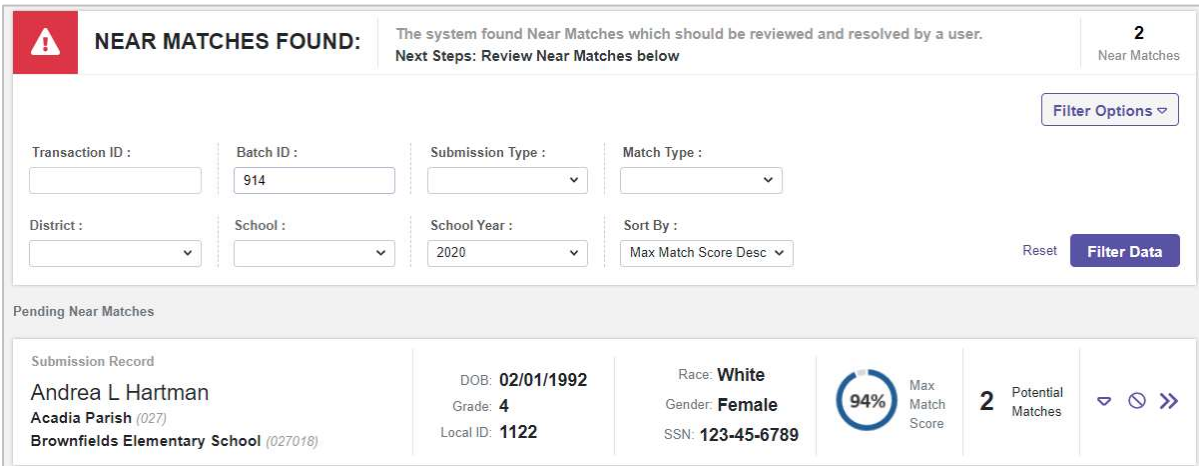
Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
925 UID_S.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	Pending: Queued	Refresh
922 UID_922.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00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




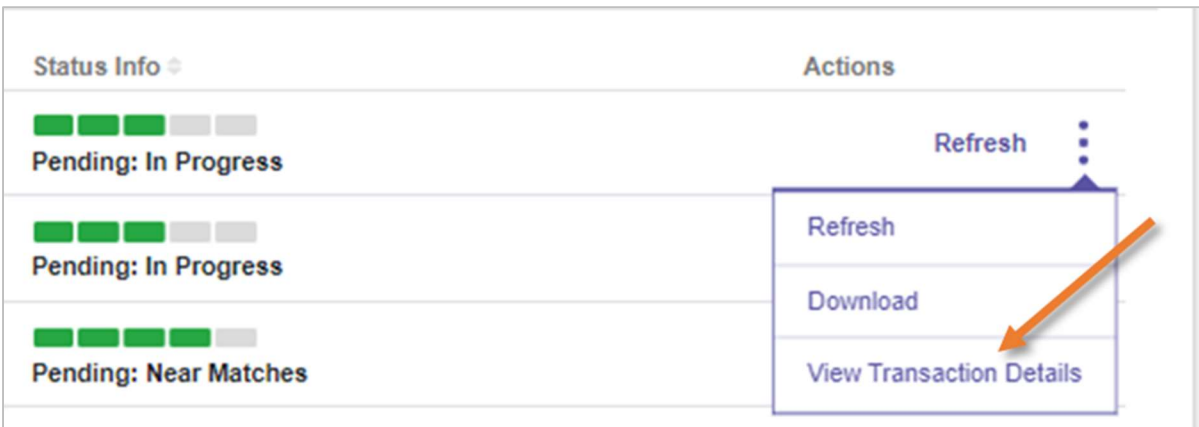
3. The application will display the Near Match List page.



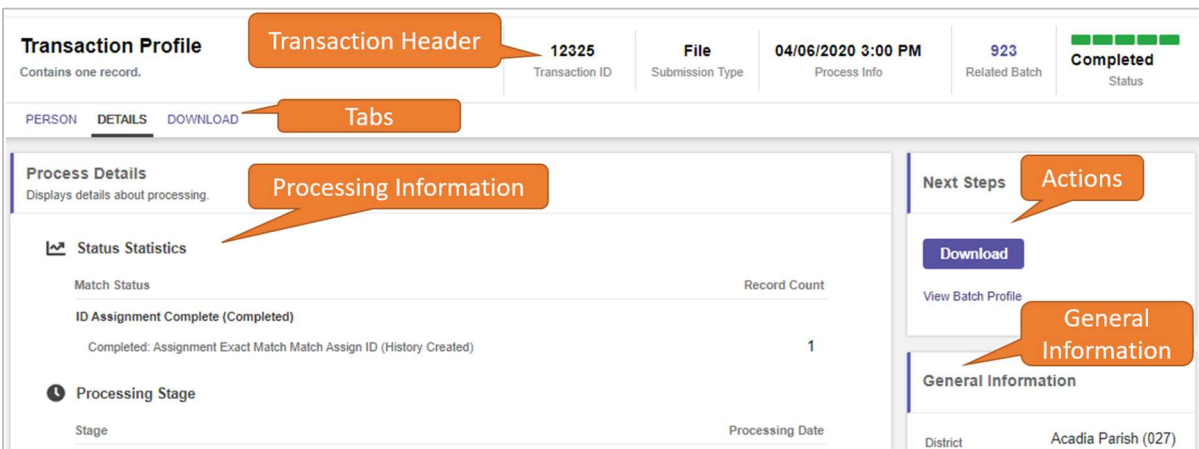
4. For more instructions on how to resolve Near Matches, refer to the [Lesson: How to Resolve Near Matches](#).

## 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.

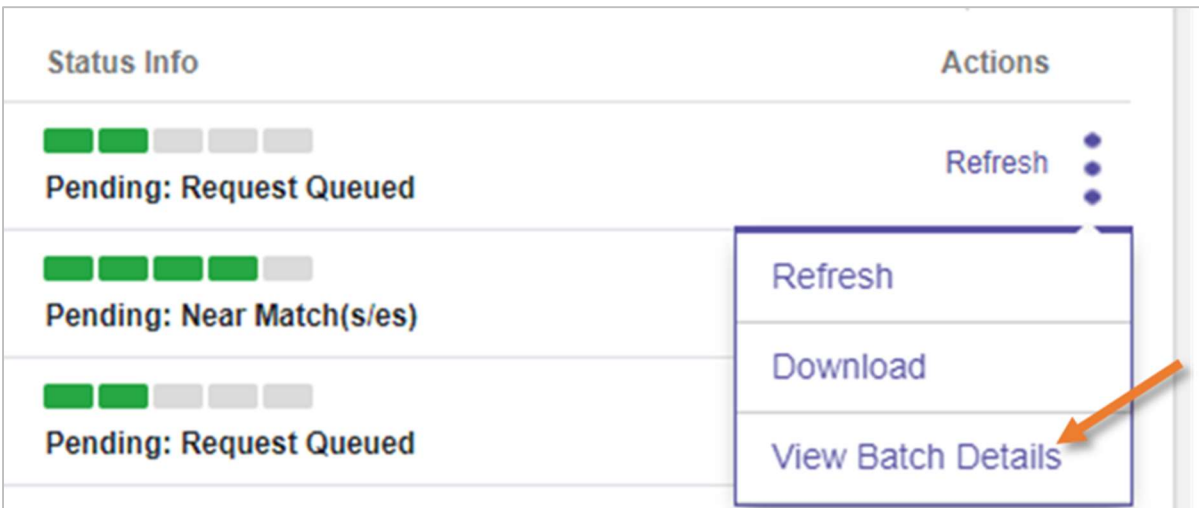


5. The application will display the Transaction Profile for the selected Transaction.

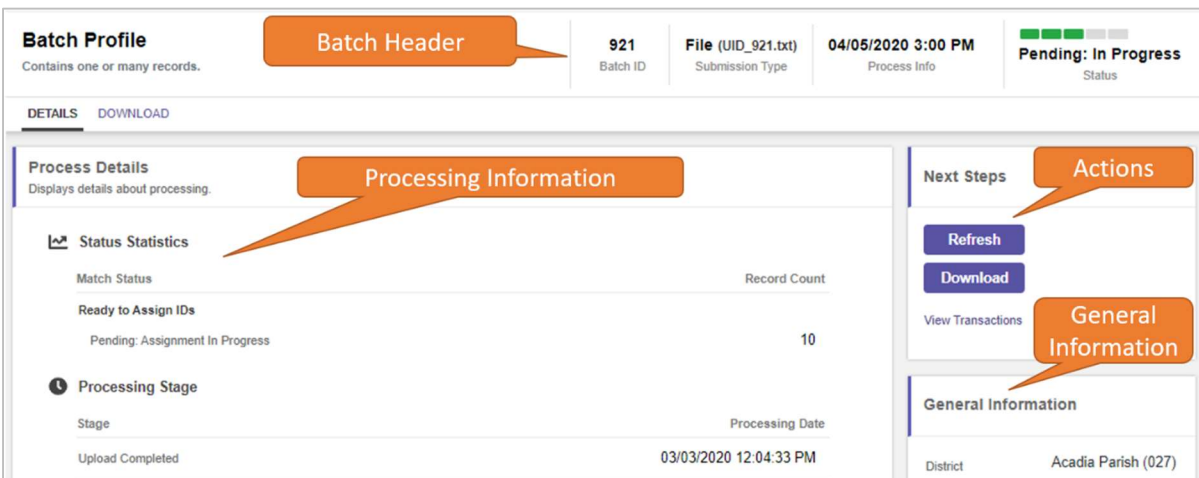


## Lesson: How to Drill into Batch Profile

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](#)

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## Match Options

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### *Chapter Highlights*

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

### **Overview**

The Match Options component enables users to perform matches.


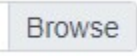
The Match Options page includes a Match Options form section and a Match Results section. The Match Results section is not displayed until a match request is performed.

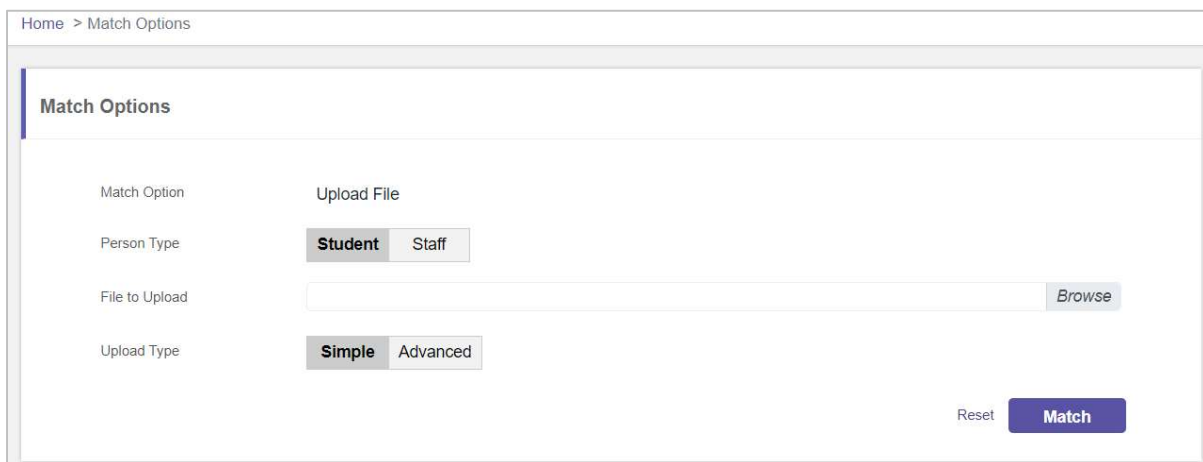
### **Person Match: Upload File**

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.

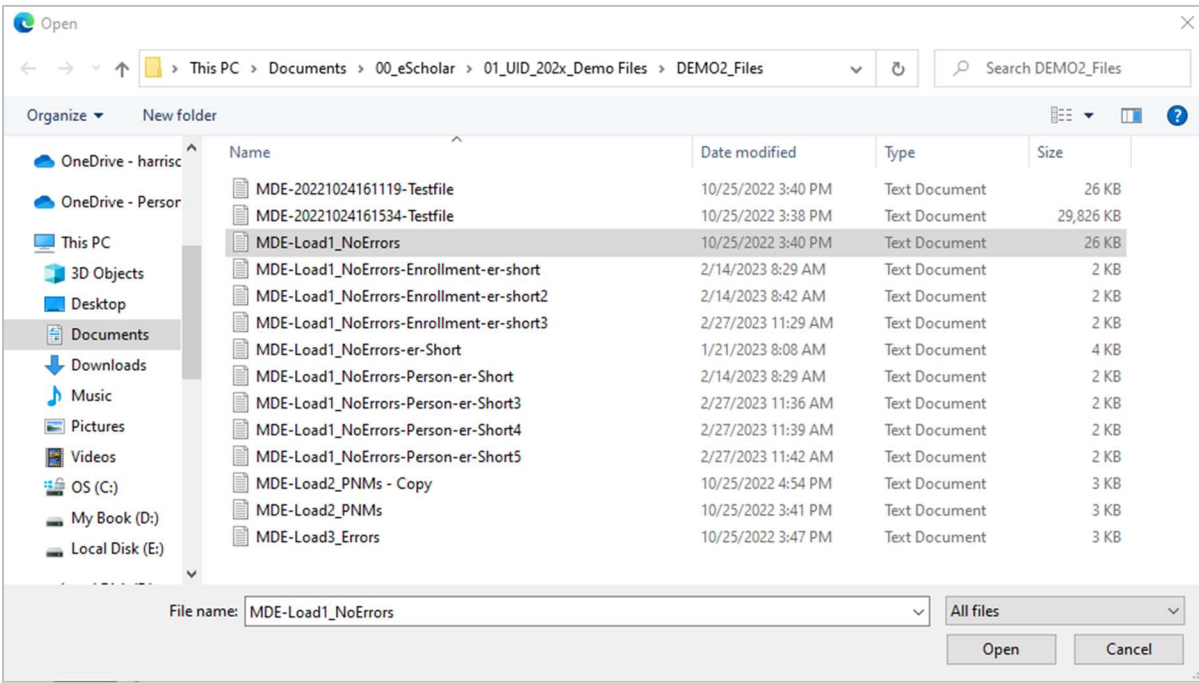


The screenshot shows a web interface titled "Match Options" with a breadcrumb "Home > Match Options". The interface is divided into two columns: "Match Option" and "Upload File".

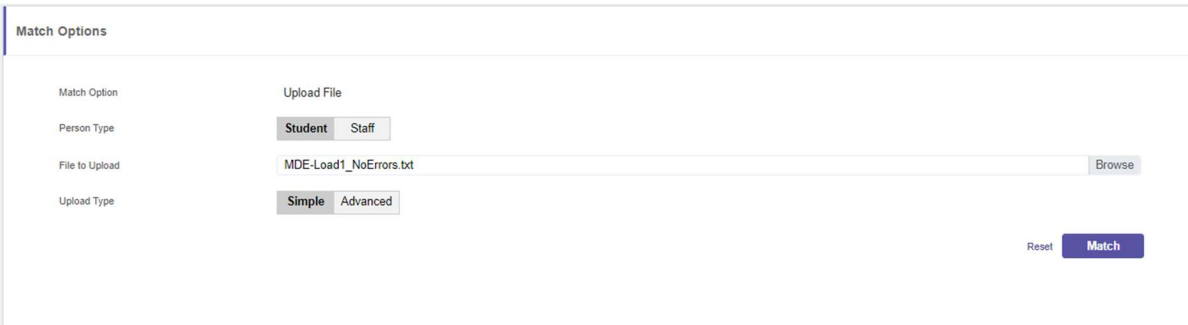
Match Option	Upload File
Person Type	<input type="radio"/> Student <input type="radio"/> Staff
File to Upload	<input type="text"/> <input type="button" value="Browse"/>
Upload Type	<input type="radio"/> Simple <input type="radio"/> Advanced

At the bottom right, there are two buttons: "Reset" and "Match".

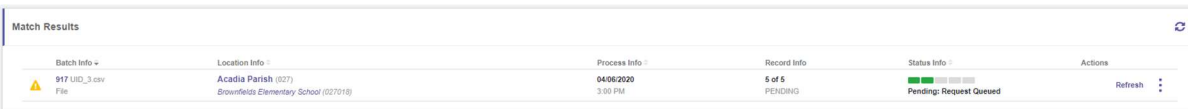
4. Select the file to upload. Click Open.



5. Click Match.



6. View or drill into the match results.



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## 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)

**Other Information**

- Birth Location (optional)
- Residency Status (optional)
- Residency Expiration Date (optional): mm/dd/yyyy
- Mother's Maiden Name (optional)

**Credential Information**

**Customer Defined Fields**

Scroll down the page to see additional fields.

**Gender**: Female Male Unknown

Date of Birth: mm/dd/yyyy

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): mm/dd/yyyy

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)

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

Reset

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.

FIELDS/DATA	DESCRIPTION	FORM INFO
Last Name	The legal last name of the person. Used for Matching.	Textbox. Required.
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.

FIELDS/DATA	DESCRIPTION	FORM INFO
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.
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

FIELDS/DATA	DESCRIPTION	FORM INFO
		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.
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.

FIELDS/DATA	DESCRIPTION	FORM INFO
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

FIELDS/DATA	DESCRIPTION	FORM INFO
		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.
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.

FIELDS/DATA	DESCRIPTION	FORM INFO
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.
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

FIELDS/DATA	DESCRIPTION	FORM INFO
		<p>data authorization. See Lesson below for more details.</p> <p>Required.</p>
Resident Location	Indicates the Resident Location of the Person.	<p>Drop down menu with valid Resident Location options. Optional by default but may be required by a System Administrator.</p> <p>Resident location is not tied to user location authorization.</p>
Local ID	Indicates the Local ID of the Person.	Textbox. Required.
Source System	Indicates the Source System of the Match.	<p>Drop down menu with valid Source System options.</p> <p>Required.</p>
Alternate ID	Indicates the Alternate ID of the Person.	<p>Textbox. Optional by default but may be required by a System Administrator.</p> <p>If Alternate ID Source is supplied, Alternate ID is required.</p>


FIELDS/DATA	DESCRIPTION	FORM INFO
Alternate ID Source	Indicates the Alternate ID Source of the Person.	<p>Drop down menu with valid Alternate ID Source options. Optional by default but may be required by a System Administrator.</p> <p>If Alternate ID is supplied, Alternate ID Source is required.</p>
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.

FIELDS/DATA	DESCRIPTION	FORM INFO
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.
Annual Salary	Indicates the contractual salary of a person.	Textbox. <b>Must be numeric.</b> 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.

FIELDS/DATA	DESCRIPTION	FORM INFO
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.
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: Female Male Unknown

Date of Birth:  

**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](#)

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**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	<div style="width: 100%; height: 10px; background-color: #ccc; position: relative;"> <div style="width: 100%; height: 100%; background-color: #008000; position: absolute;"></div> </div> Pending: Near Matches	<a href="#">Resolve</a> 

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## Match Results


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### *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, 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

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
		<p>listed and will be a hyperlink to the Batch Info page.</p> <p>This is only visible for the Individual Match submission type.</p>
Record Info	<p>Count of records in the current Batch Status</p> <p>Count of total records in the Batch Status</p>	<p>Includes counts to help determine progress of the Batch. The Status will indicate the current Status of the Batch.</p> <p>This is only visible for the Upload File submission type.</p>
Status Info	<p>Progress Bar</p> <p>Status</p>	<p>Includes a 5-section status bar which visualizes the Status of the Transaction and the text of the Status.</p>
Actions		<ul style="list-style-type: none"> <li>• Dropdown Menu: Click to view more actions.             <ul style="list-style-type: none"> <li>○ Continue</li> <li>○ Refresh</li> <li>○ Resolve</li> <li>○ View</li> <li>○ Download</li> <li>○ View Transaction Details (This is only</li> </ul> </li> </ul>

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
		visible for the Individual Match submission type.) <ul style="list-style-type: none"><li>○ View Batch Details (This is only visible for the Upload File submission type.)</li></ul>


## 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
 <b>893</b> Individual	<b>Acadia Parish (027)</b> <i>Brownfields Elementary School (017018)</i>	<b>04/03/2020</b> 3:00 PM	12	<div style="width: 100%; height: 10px; background-color: #008000; border: 1px solid #008000;"></div> <b>Pending: Near Matches</b>	Resolve <span style="font-size: 0.8em;">⋮</span>

5. Upload File Match Results Example.

**Match Options**

Batch submitted. Review details below. New Match

**Quick Tips**


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** ↻

Batch Info ▾	Location Info ▾	Process Info ▾	Record Info	Status Info ▾	Actions
 <b>917 UID_3.csv</b> File	<b>Acadia Parish (027)</b> <i>Brownfields Elementary School (027018)</i>	<b>04/06/2020</b> 3:00 PM	<b>5 of 5</b> PENDING	<div style="width: 100%; height: 10px; background-color: #008000; border: 1px solid #008000;"></div> <b>Pending: Request Queued</b>	Refresh <span style="font-size: 0.8em;">⋮</span>

- 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
 <b>893</b> Individual	<b>Acadia Parish (027)</b> <i>Brownfields Elementary School (017018)</i>	<b>04/03/2020</b> 3:00 PM	12	 <b>Pending: Near Matches</b>	Resolve 

- 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 :
<input type="text"/>	<input type="text" value="914"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="State ID"/>
District :	School :	School Year :	Process Date Range :	Sort By :	
<input type="text"/>	<input type="text"/>	<input type="text" value="2020"/>	<input type="text" value="04/06/2020"/> X to <input type="text"/>	<input type="text" value="Max Match Score Desc"/>	

Reset Filter Data

**Pending Near Matches**

<p><small>Submission Record</small></p> <p><b>Oliver Jones</b> Acadia Parish (027) Brownfields Elementary School (027018)</p>	<p><small>Date of Birth:</small> <b>09/23/2001</b></p> <p><small>Grade:</small> <b>Undergraduate</b></p> <p><small>Local ID:</small> <b>12345</b></p>	<p><small>Race:</small> <b>White</b></p> <p><small>Gender:</small> <b>Male</b></p> <p><small>Social Security Number:</small> <b>098-12-1133</b></p>	<div style="border: 2px solid #4a7ebb; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin: 0 auto;"> <span style="color: white; font-weight: bold; font-size: 1.2em;">94%</span> </div> <p><small>Max Match Score</small></p>	<p><b>4</b> <small>Potential Matches</small></p>	<span>▾</span> <span>⋮</span> <span>»</span>
---	---	---	---	--	--

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1
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## Near Match Header

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

**NEAR MATCH(S/ES) FOUND:**

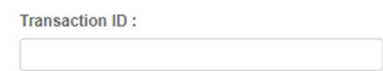
The system found Near Match(s/es) which should be reviewed and resolved by a user.  
Next Steps: Review Near Match(s/es) below

**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.

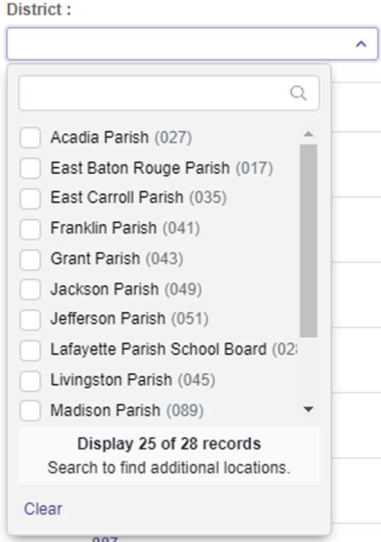
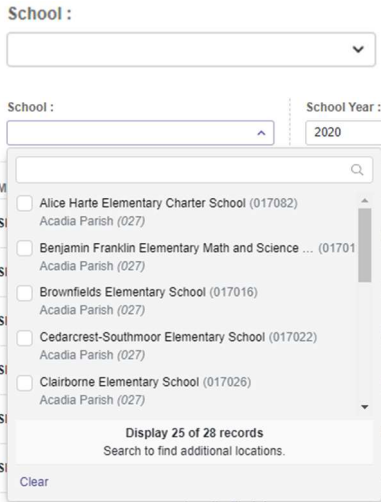
### Filter Options

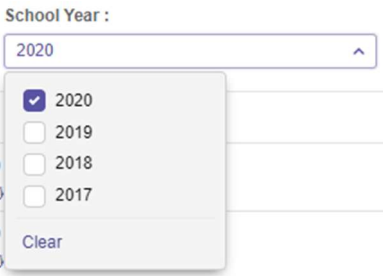

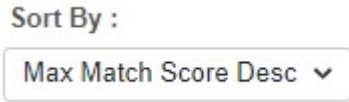
The Filter Option allows the Near Match List to be filtered based on specific needs, including by Transaction ID, Batch ID, School Year, and others as described below.

DATA/FIELD	IMAGE	DESCRIPTION
Transaction ID		<p>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.</p> <p>To filter on a Transaction ID, enter</p>

		<p>the ID in the Transaction ID field.</p>
<p>Batch ID</p>	<p>Batch ID :</p> <input data-bbox="451 659 821 695" type="text"/>	<p>Each Batch is assigned a unique Batch identifier. This filter field will restrict the results to the specific Batch ID entered in this field.</p> <p>To filter on a Batch ID, enter the ID in the Batch ID field.</p>
<p>Submission Type</p>	<p>Submission Type :</p> <div data-bbox="451 1192 831 1486"> <input type="text" value=""/> <ul style="list-style-type: none"> <li><input type="checkbox"/> File</li> <li><input type="checkbox"/> Individual Match</li> <li><input type="checkbox"/> SLF</li> <li><input type="checkbox"/> Edit</li> <li><input type="checkbox"/> Webservice</li> <li><input type="checkbox"/> Automation</li> </ul> <p>Clear</p> </div>	<p>The Submission Type filter will list all the Submission Type options available to the user. This may include:</p> <ul style="list-style-type: none"> <li>▪ File</li> <li>▪ Individual Match</li> <li>▪ SIF</li> <li>▪ Edit</li> <li>▪ Web Services</li> <li>▪ Automation</li> </ul>

		<p>To filter on one or more of the options, click the selection box(es) to the left of the name.</p> <p>To clear all selected options, click the Clear link.</p>
Last Name	<p>Last Name :</p> <input type="text"/>	Last Name
Identifier	<p>Identifier :</p> <input type="text"/>	Identifier
Identifier Type	<p>Identifier Type :</p> <div style="border: 1px solid #ccc; padding: 2px;"> <p>State ID ^</p> <p style="background-color: #4a7ebb; color: white; padding: 2px;">State ID</p> <p>Local ID</p> </div>	The Type of ID such as State, Local, etc
District	<p>District :</p> <input type="text"/>	<p>The District filter will list all the districts the user is authorized to view. This filter option also includes a search feature.</p> <p>To filter on one or more of the options, click the selection</p>

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

		<p>name in the search field.</p> <p>To clear all selected options, click the Clear link.</p>
<p>School Year</p>		<p>The School Year filter will list all the school year options.</p> <p>To filter on one or more of the options, click the selection box(es) to the left of the name.</p> <p>To clear all selected options, click the Clear link.</p>
<p>Process Date Range</p>		<p>The Process Date range filter for Submission Dates</p>
<p>Sort By</p>		<p>The Sort By option sorts the results by the selected option.</p> <p>The options are:</p>










		<ul style="list-style-type: none"> <li>• Max Match Score (Desc)</li> <li>• Max Match Score (Asc)</li> <li>• Last Name (Desc)</li> <li>• Last Name (Asc)</li> </ul>
--	--	--

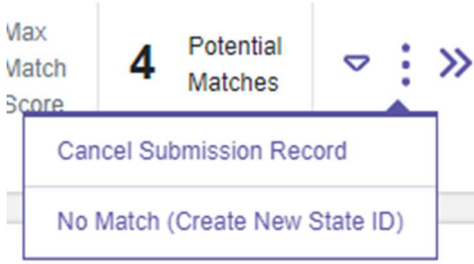

**Pending Near Matches Section**

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

	<p>Grade</p> <p>Local ID</p> <p>Race</p> <p>Gender</p> <p>SSN</p>								
Match Information	<p>Max Match Score in a Donut Chart</p> <p>Count of Potential Matches</p>								
Actions	<table border="1"> <thead> <tr> <th>Icon</th> <th>Description</th> </tr> </thead> <tbody> <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> <p>The Multiple Actions icon: When clicked, it will display more options.</p> <ul style="list-style-type: none"> <li>- Cancel Submission Record: Allows the user to cancel the reviewing Submission Record and all pending near matches for this Submission Record.</li> </ul> </td> </tr> </tbody> </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.		<p>The Multiple Actions icon: When clicked, it will display more options.</p> <ul style="list-style-type: none"> <li>- Cancel Submission Record: Allows the user to cancel the reviewing Submission Record and all pending near matches for this Submission Record.</li> </ul>
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.								
	<p>The Multiple Actions icon: When clicked, it will display more options.</p> <ul style="list-style-type: none"> <li>- Cancel Submission Record: Allows the user to cancel the reviewing Submission Record and all pending near matches for this Submission Record.</li> </ul>								

		<p>- No Match (Create New State ID): Allows the user to make a “No Match” decision for the Submission Record and create a new ID.</p> 
		<p>Drill Into: When clicked, the application will navigate to the Compare Near Match page for the selected Submission Record.</p>

### 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(es)

[Filter Options](#)

Transaction ID:	Batch ID: <input type="text" value="242"/>	Submission Type: <input type="text"/>	Last Name: <input type="text"/>	Identifier: <input type="text"/>	Identifier Type: <input type="text"/>
Location: <input type="text"/>	Building: <input type="text"/>	Enrollment Year(School Year): <input type="text"/>	Process Date Range: <input type="text" value="mm/dd/yyyy"/> to <input type="text" value="mm/dd/yyyy"/>		Sort By: <input type="text" value="Max Match Score Desc"/>

Reset [Filter Data](#)

Pending Near Match(s/es)

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

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.

DATA/FIELD	DESCRIPTION	
Match Score	Displays the Match Score for the potential Near Match (Master Record).	
Actions	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.
	»	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

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*Legend*

Match Indicators

■ Near Match

Decision Icons

✓ 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%	✓ >>

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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  
Batch ID    Transaction ID

● Pending

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

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

Cancel Submission Record
No Match

SUBMISSION RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD
SOURCE: File	SOURCE: Master Record	SOURCE: Master Record	SOURCE: Master Record
	94% Match Score	87% Match Score	87% Match Score
	Match ID: 9015404011	Match ID: 9015404111	Match ID: 9015404122
	Update Master <input type="checkbox"/> Yes <input type="checkbox"/> No	Update Master <input type="checkbox"/> Yes <input type="checkbox"/> No	
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



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

<b>Compare Records</b> The Near Matches for the submission record are displayed below.	<b>63</b> Batch ID	<b>201257</b> Transaction ID	 <b>Pending</b>
---	-----------------------	---------------------------------	--

## 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.

 <b>Pending Near Matches Queued</b> A Match Decision is required. Record submitted by mobermeier@escholar.com on 11/14/2022	<a href="#">View Pending Near Match List</a> <a href="#">View Home Page</a> <a href="#">View Transaction Details</a>
--	--

### **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.

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

### **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.

 <b>Match Decision</b> The submission record was matched to an existing record. Resolved by: Andrea Hartman on 05/22/2021	<a href="#">View Pending Near Match List</a> <a href="#">View Transaction Details</a>
--	--

### **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.



### 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.
	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 aharlman@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 <b>Oliver</b>	<b>Oliver</b>	<b>Oliver</b>	<b>Oliver</b>
Middle Name	<b>S</b>		<b>L</b>
Last Name <b>Jones</b>	<b>Jones</b>	<b>Jone</b>	<b>Jone</b>
Suffix			
Alternate Last Name			
Gender <b>Male</b>	<b>Male</b>	<b>Male</b>	<b>Male</b>
Date of Birth <b>09/23/2001</b>	<b>09/23/2000</b>	<b>09/23/2000</b>	<b>09/22/2000</b>
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.
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.

FIELDS/DATA	DESCRIPTION
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.

FIELDS/DATA	DESCRIPTION
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.

FIELDS/DATA	DESCRIPTION
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.
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.

FIELDS/DATA	DESCRIPTION
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 <b>Job Classification</b> 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 <b>Job Assignment Primary</b> 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 <b>Job Assignment Secondary</b> 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 Tertiary	Displays the <b>Job Assignment Tertiary</b> 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 <b>Itinerant Flag</b> 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

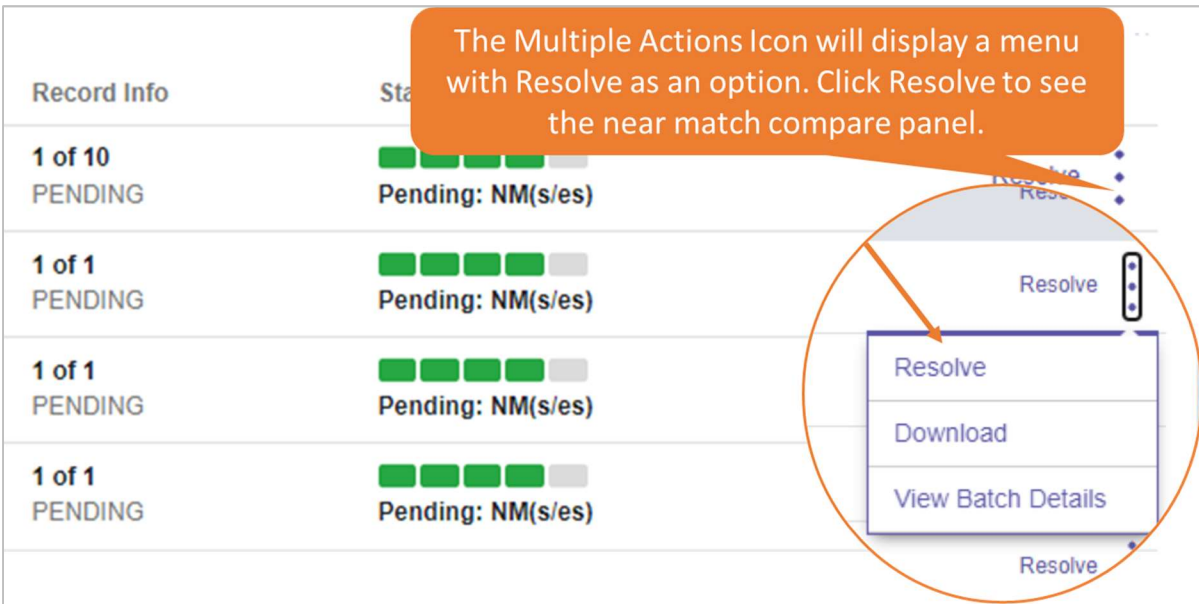
The Matching Information section lists matching data for the transaction. These fields are not used in the Matching Process. These fields help the user compare the values between

the Submission Record and Near Matches (Index Records) to decide if the record is a Match or No Match. The fields are:

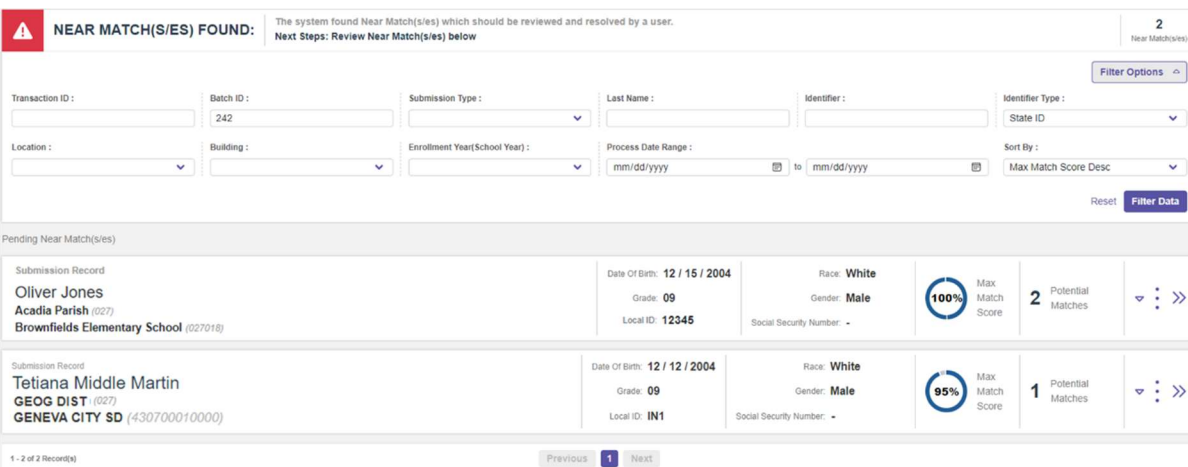
FIELDS/DATA	DESCRIPTION
Match Score	Displays the Match Score to the Submission Record for each Near Match.
Match Decision	Displays the Match Decision for Submission Record and each Near Match.
Match Note	Displays the Match Note for Submission Record and each Near Match.
Match Trace	Displays the Match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



3. Click Resolve to access the Near Year 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.



## Lesson: How to Filter the Near Match List

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

2. 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.

3. Enter or select the appropriate filters.

4. Click the Filter Data button to apply the filters to the list.
5. The application will update the Near Match List based upon the selected filters.
6. 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(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)

<p style="font-size: 0.8em; margin-top: 0;">Submission Record</p> <p><b>Patel Jay</b>  <small>RCC WAYNE FINGERLAKES/WFL/EDUTECH (439000910000)  NEW YORK STATE SCHOOL FOR THE BLIND (180300877197)</small></p>	<p style="font-size: 0.8em; margin-top: 0;">Date Of Birth: 12 / 15 / 2004</p> <p style="font-size: 0.8em; margin-top: 0;">Grade: 09 Local ID: CN1</p>	<p style="font-size: 0.8em; margin-top: 0;">Race: White Gender: Male Social Security Number: -</p>	<div style="border: 2px solid #007bff; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin: 0 auto;"> <span style="font-size: 0.8em; font-weight: bold;">100%</span> </div> <p style="font-size: 0.8em; margin-top: 0;">Max Match Score</p>	<p style="font-size: 0.8em; margin-top: 0;">2 Potential Matches</p>	<span style="font-size: 0.8em;">⌵</span> ⋮ <span style="font-size: 0.8em;">⌵</span>
<p style="font-size: 0.8em; margin-top: 0;">Submission Record</p> <p><b>Ray Susakim</b>  <small>RCC WAYNE FINGERLAKES/WFL/EDUTECH (439000910000)  NEW YORK STATE SCHOOL FOR THE BLIND (180300877197)</small></p>	<p style="font-size: 0.8em; margin-top: 0;">Date Of Birth: 12 / 12 / 2006</p> <p style="font-size: 0.8em; margin-top: 0;">Grade: 09 Local ID: IN1</p>	<p style="font-size: 0.8em; margin-top: 0;">Race: White Gender: Male Social Security Number: 523 - 11 - 3401</p>	<div style="border: 2px solid #007bff; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin: 0 auto;"> <span style="font-size: 0.8em; font-weight: bold;">95%</span> </div> <p style="font-size: 0.8em; margin-top: 0;">Max Match Score</p>	<p style="font-size: 0.8em; margin-top: 0;">1 Potential Matches</p>	<span style="font-size: 0.8em;">⌵</span> ⋮ <span style="font-size: 0.8em;">⌵</span>

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 :  
04/06/2020 to

Sort By :

Reset [Filter Data](#)

Pending Near Matches

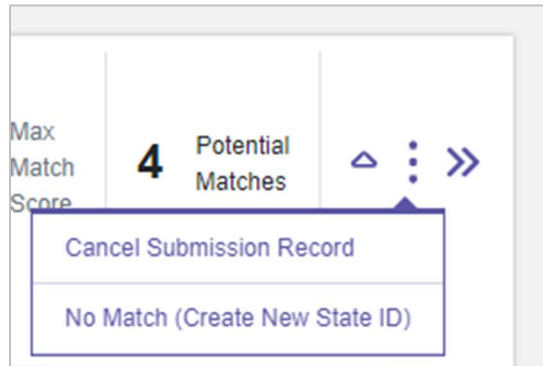
<p>Submission Record</p> <p><b>Oliver Jones</b> Acadia Parish (027) Brownfields Elementary School (027018)</p>	<p>Date of Birth: <b>09/23/2001</b> Grade: <b>Undergraduate</b> Local ID: <b>12345</b></p>	<p>Race: <b>White</b> Gender: <b>Male</b> Social Security Number: <b>098-12-1133</b></p>	<p><b>94%</b> Max Match Score</p>	<p><b>4</b> Potential Matches</p>	<p>⏏ ⋮ ⏏</p>
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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		<b>94%</b>	✓ >>
Oliver Jone (9818404111)	Acadia Parish (027) Brownfields Elementary School (027018)	09/23/2000	12		White	Male		<b>87%</b>	✓ >>
Oliver L Jone (9818404122)	Acadia Parish (027) Brownfields Elementary School (027018)	09/22/2000	12		White	Male		<b>87%</b>	✓ >>
Oliver Jone (9818404115)	Acadia Parish (027) Brownfields Elementary School (027018)	09/23/2001	12		White	Male		<b>87%</b>	✓ >>

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.

The screenshot displays a comparison interface between a submission record and three near match records. The submission record is on the left, and the near match records are on the right. The near match records are sorted by match score, with the highest score (94%) on the left and the lowest (87%) on the right. The interface includes navigation arrows and 'Update Master' buttons for each near match record.

Matching Fields	94% Match	87% Match	87% Match
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
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	NEAR MATCH RECORD SOURCE: Master Record	NEAR MATCH RECORD SOURCE: Master Record	
◀	<div style="border: 1px solid #4a7ebb; border-radius: 50%; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center;"> <span style="font-size: 24px; font-weight: bold; color: #4a7ebb;">94%</span> </div> <p style="font-size: 10px; margin: 0;">Match Score</p> <div style="border: 1px solid #4a7ebb; background-color: #4a7ebb; color: white; padding: 2px; margin: 5px auto; width: 80%; text-align: center;">Match: ID 9818404011</div> <p style="font-size: 10px; margin: 0;">Update Master: <span style="margin: 0 5px;">Yes</span> <span>No</span></p>	<div style="border: 1px solid #4a7ebb; border-radius: 50%; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center;"> <span style="font-size: 24px; font-weight: bold; color: #4a7ebb;">87%</span> </div> <p style="font-size: 10px; margin: 0;">Match Score</p> <div style="border: 1px solid #4a7ebb; background-color: #4a7ebb; color: white; padding: 2px; margin: 5px auto; width: 80%; text-align: center;">Match: ID 9818404111</div> <p style="font-size: 10px; margin: 0;">Update Master: <span style="margin: 0 5px;">Yes</span> <span>No</span></p>	<div style="border: 1px solid #4a7ebb; border-radius: 50%; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center;"> <span style="font-size: 24px; font-weight: bold; color: #4a7ebb;">87%</span> </div> <p style="font-size: 10px; margin: 0;">Match Score</p> <div style="border: 1px solid #4a7ebb; background-color: #4a7ebb; color: white; padding: 2px; margin: 5px auto; width: 80%; text-align: center;">Match: ID 9818404122</div> <p style="font-size: 10px; margin: 0;">Update Master: <span style="margin: 0 5px;">Yes</span> <span>No</span></p>	▶
Matching Fields	!	!	!	
First Name	<b>Oliver</b>	<b>Oliver</b>	<b>Oliver</b>	
Middle Name	s		L	
Last Name	<b>Jones</b>	<b>Jone</b>	<b>Jone</b>	

- 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](#)

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## Search

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### *Chapter Highlights*

- [Overview](#)
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- [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.

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.

FIELDS/DATA	DESCRIPTION
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.
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.

FIELDS/DATA	DESCRIPTION
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.

The screenshot shows a web interface for search options. At the top, there is a breadcrumb 'Home > Search Options'. Below this is a section titled 'Search Options' with four tabs: 'BY PERSON', 'BY ID', 'BY LOCATION' (which is selected and underlined), and 'BY FILE'. The 'BY LOCATION' section contains the following fields:
 

- 'District': A dropdown menu.
- 'School (optional)': A dropdown menu.
- 'Active/Inactive Indicator': Three buttons labeled 'All', 'Active', and 'Inactive'. The 'All' button is currently selected.
- 'Enrollment Year(School Year) (optional)': A dropdown menu with '2022' selected.

 At the bottom right of the form, there are two buttons: 'Reset' and '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.

FIELDS/DATA	DESCRIPTION
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

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**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.

FIELDS/DATA	DESCRIPTION
Search Number	If Find a Previous File is selected, enter the search number 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 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 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	<p>The Match Indicator icon indicates whether the match falls into a Match or a Near Match status.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p style="text-align: center;"><b>Match Indicators</b></p> <p> <span style="display: inline-block; width: 15px; height: 15px; background-color: #008000; margin-right: 5px;"></span> Match                             <span style="display: inline-block; width: 15px; height: 15px; background-color: #ffa500; margin-left: 20px; margin-right: 5px;"></span> Near Match                         </p> </div>
State ID	Displays the State ID.

FIELDS/DATA	DESCRIPTION
Name	Displays the First and Last Name.
DOB	Displays the Date of Birth.
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


Qualifier

Date Format

Include Header/Footer

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.

FIELDS/DATA	DESCRIPTION
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.

FIELDS/DATA	DESCRIPTION
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	<p>Provides a list of valid actions based on the status of the extract, including Refresh or Download.</p> <p>Refresh – When clicked, the extract information for the specific download will be updated.</p> <p>Download – When clicked, the extract will be downloaded/available.</p>

## 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):

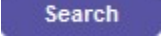
Last Name:

Suffix (optional):

Date Of Birth (optional):  

Gender (optional): Female Male Male 2

[Reset](#) [Search](#)


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

[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 (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.

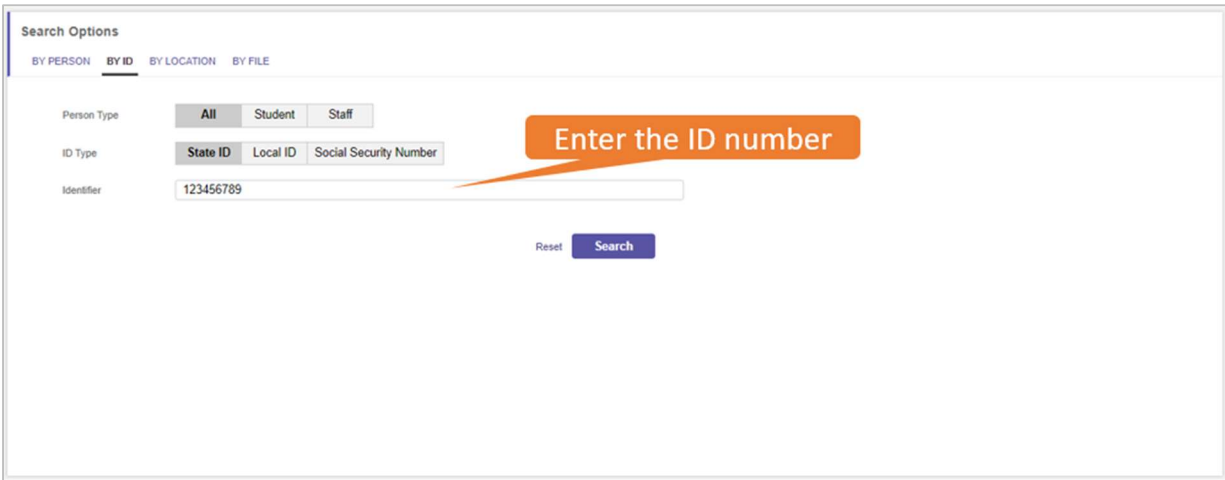
- If you do not see a match, you can create a New Person by clicking the Add New Person button.

The screenshot displays a 'Search Results' page. At the top right, a blue button labeled '+ Add New Person' is circled in orange. Below this, there are filter options for Gender, Ethnicity Indicator, Race, Grade, District, and School, each with a dropdown menu. A 'Filter Options' dropdown and 'Reset' and 'Filter Data' buttons are also present. The main content is a table with the following columns: State ID, Name, Date of Birth, Gender, Ethnicity Indicator / Race, Social Security Number, Grade, Location Info, ID Info, Match Score, and Actions. Three search results are shown, each with a match score of 87%.

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	###-##-7054	--	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%	>>

## 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

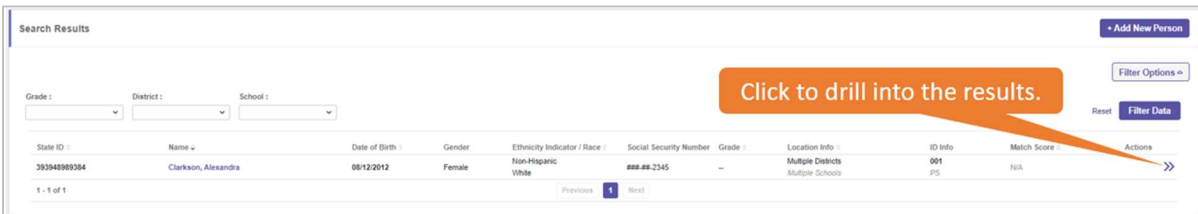
Person Type: **All** Student Staff

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

Identifier: 123456789

Reset Search

4. Click Search.



**Search Results**

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
393948989384	Clarkson, Alexandra	05/12/2012	Female	Non-Hispanic White	###-##-2345	-	Multiple Districts Multiple Schools	001 PS	N/A	>>

1 - 1 of 1

Previous 1 Next

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:

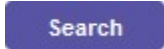
School (optional):

Active/Inactive Indicator: All Active Inactive

Enrollment Year(School Year) (optional):

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:

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	###-##-7654	--	Acadia Parish (027) Benjamin Franklin Elementary Math and Science School (027011)	1234 SIS	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	>>

Download all person results from the location selected

Filter Data – select desired filter options

Drill In

## 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

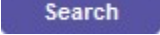
District:

School (optional):

Active/Inactive Indicator: All Active Inactive

Enrollment Year(School Year) (optional):

[Reset](#) [Search](#)

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

**Search Results**

[Download](#) [+ Add New Person](#)

[Filter Options](#)

Grade:

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

Download all person results from the location selected

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	###-##-7654	--	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:  ▼

Include Header/Footer:  Yes  No

Click Generate Extract


Generate Extract

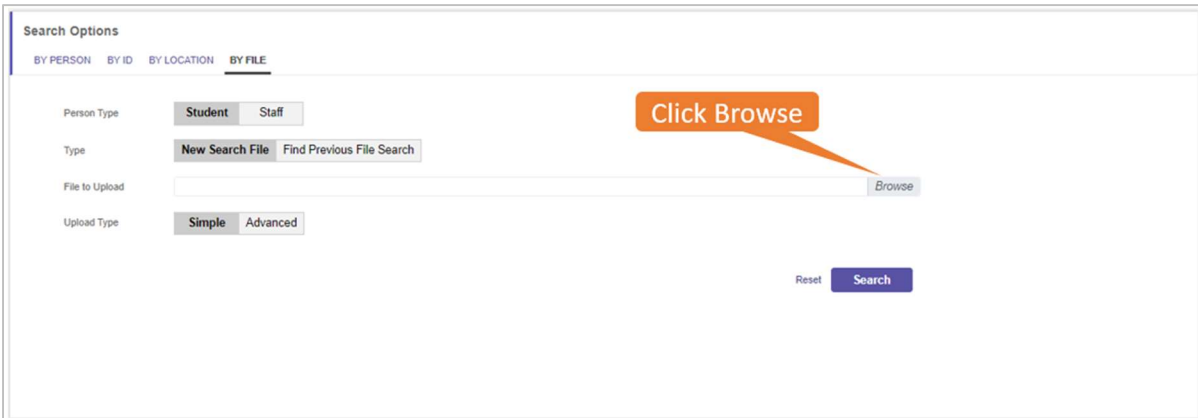
7. Click Download.

**Extract File**

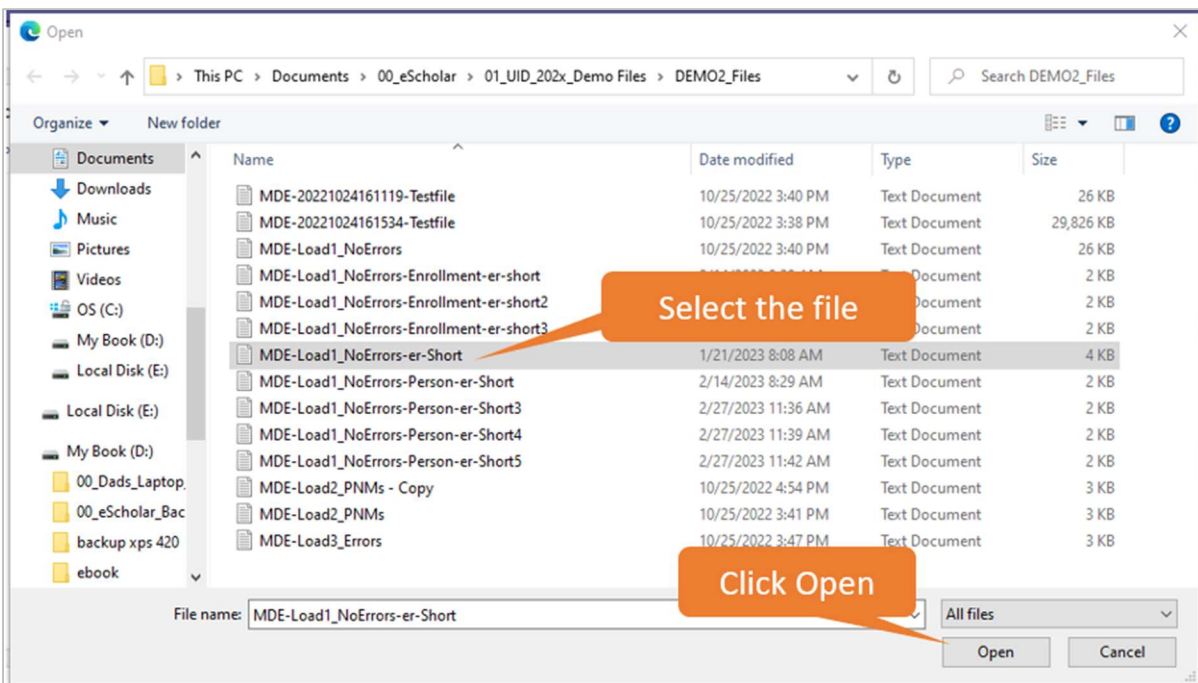
Extract Date	Location Info	School Year	Record Count	Extract Name	Extract Status	Actions
11/22/2022 2:34 PM	Acadia Parish (027) Brownfields Elementary School (01718)	2022	37 of 37	UID_SEARCHBYLOC_973_11222022_234PM_IDRES.txt	Completed	Download

## 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.



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

Upload Type: **Simple** Advanced

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

**Search Results**

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

[TOC](#)

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## Person Profile

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### *Chapter Highlights*

- [Overview](#)
- [Person 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 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

**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.
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.

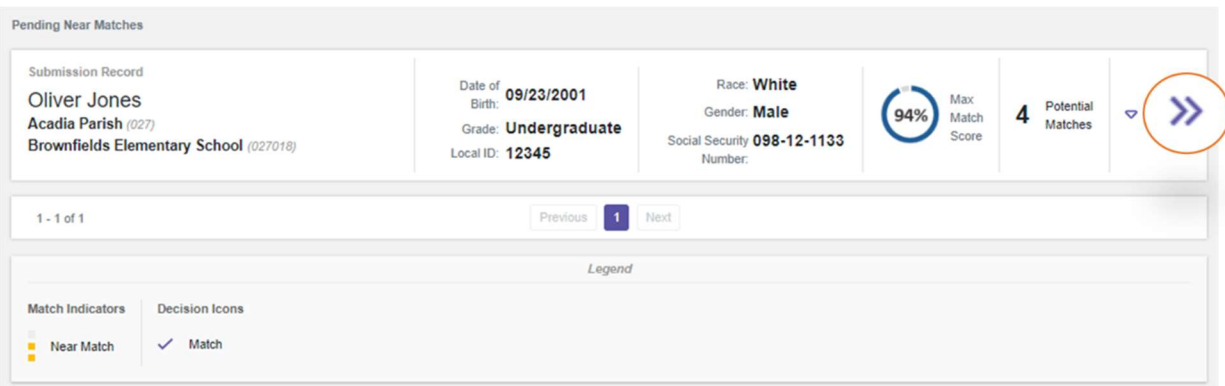
Master Record Highlights	Pending Near Matches
<p><b>Person Information</b></p> <p>First Name: Andrea</p> <p>Middle Name: L</p> <p>Last Name: Hartman</p> <p>Alternate Last Name:</p> <p>Gender: Female</p> <p>Date of Birth: 02/01/1992</p> <p>Social Security Number: 123-45-6789</p> <p>Ethnicity Indicator: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

### 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**  
 Race: **White**  
 Gender: **Male**  
 Grade: **Undergraduate**  
 Local ID: **12345**

Social Security Number: **098-12-1133**

**94%** Max Match Score  
**4** Potential Matches

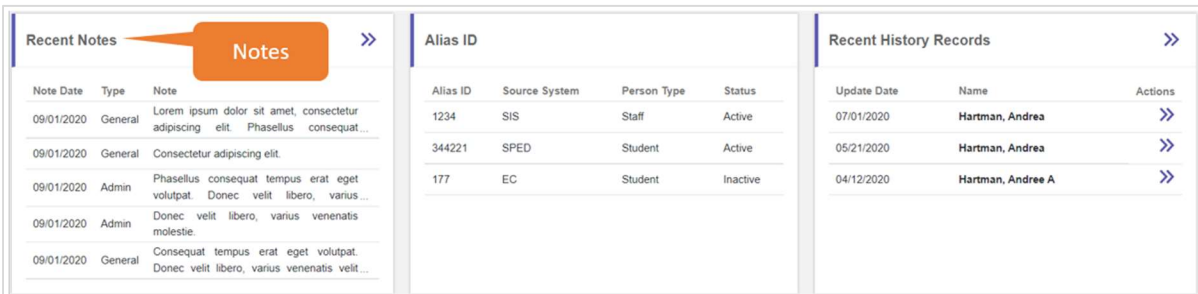
1 - 1 of 1

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** >>

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 veill...

**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.

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

## 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.

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					
<b>Person Information</b>		<b>Contact Information</b>		<b>Other Information</b>	
First Name	Andrea	Address 1	450 Main Street	Birth Location	
Middle Name	L	Address 2		Residency Status	
Last Name	Hartman	City	Crowley	Residency Expiration Date	
Suffix		State	Louisiana	Mother's Maiden Name	
Alternate Last Name		Zip	70526	<b>Customer Defined Fields</b>	
Nickname		Geocode		Email	
Gender	Female	<b>Credential Information</b>		Phone	
Date of Birth	02/01/1992	Highest Degree Earned		Customer Defined Field 3	
Social Security Number	123-45-6789	Subject Matter Area		Customer Defined Field 4	
Ethnicity Indicator	Non-Hispanic	Degree Provider		Customer Defined Field 5	
Race	White	Certificate Number		Customer Defined Field 6	
Race 2		Certificate Type			
Race 3					

*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.

FIELDS/DATA	DESCRIPTION
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) <span style="float: right;">+</span>							
Update Date	Enrollment Year (School Year)	Location Info	ID Info	Alternate ID	Grade	Active/Inactive Indicator	Actions
09/01/2020	2019	Acadia Parish (027) Brownfields Elementary School (027018)	1122 SIS	22 SIS	4	Active	>>
09/01/2020	2019	Acadia Parish (027) Cedarcrest-Southmoor Elementary School (027022)	255 SIS	255 SIS	3	Active	>>
09/01/2020	2019	East Baton Rouge Parish (017) Center Elementary School (017018)	7655 SIS	55 EC	2	Active	>>
09/01/2020	2019	Franklin Parish (041) Merrydale Elementary School (041058)	321 EC		1	Inactive	>>
09/01/2020	2019	East Baton Rouge Parish (017) Claiborne Elementary School (017026)	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.

FIELDS/DATA	DESCRIPTION
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 <span style="float: right;">+</span>			
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.
09/01/2020	Watson, Harry	General	Consequat tempus erat eget volutpat. Donec velit libero, varius venenatis velit libero. Consequat tempus erat eget volutpat. Donec velit libero, varius venenatis velit 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	Transaction Type	Upload
Match Score	96	Delimiter	Tab
Match Decision	Match(29272711)	Qualifier	Double Quote ("")
Match Note	Student Updated - Upper Threshold Exceeded	Last Transaction ID	122
Match Trace	Student ID Present: Present (29272711)	Batch ID	920
Record Comments	ID Updated - Direct Edit	Reference ID	67488
Record Status	Assignment: Near Match Resolution - Match Assign ID (History Created)	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.
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.

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 Name: Andrea

Middle Name:

Last Name: Hartman

Suffix:

Alternate Last Name:

Nickname:

Gender: Female

Date of Birth: 02/01/1992

Social Security Number: 123-45-6789

Ethnicity Indicator: Non Hispanic

Race: White

Race 2: Asian

Race 3:

**Contact Information**

Address 1: 450 Main Street

Address 2:

City: Crowley

State: Louisiana

Zip: 70526

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)	21271785 (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: All **Student** Staff

Search In: **Master** History Stage

Match Method: **Matching Engine** SQL

**Person Information**

First Name:

Middle Name (optional):

Last Name:

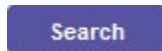
Suffix (optional):

Date of Birth (optional):

Gender (optional): Female Male Unknown

Reset Search

4. Click the Search button.



5. The Search results will be displayed.

**Search Results** + Add New Person


Filter Options ▾

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
938948987788	Fisher, Sally	09/09/2010	Female	Non-Hispanic Black	###-##-5956	4	Acadia Parish (027) Multiple Schools	006 PS	<span style="border: 1px solid #000; border-radius: 50%; padding: 2px;">87%</span>	>>

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



**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
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
Social Security Number	123-45-6789
Ethnicity Indicator	Non Hispanic
Race	White
State ID	2837736293

**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

**DirectMatch Pending Near Matches**  
2 of 2 Pending Near Matches

**Andrea Hartman** >>  
SNAP  
Client Index ID: 39348853

**Andrea Hartman** >>  
TANF  
Client Index ID: 3853

## 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
All 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**

Click the Edit Icon

**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 Ethnicity1	--

**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**

First Name

Middle Name (optional)

Last Name

Suffix (optional)

Alt Last Name (optional)

Full Person Name (optional)

Nickname (optional)

Gender Female Female Male Male 2

Date Of Birth

**Contact Information**

Address 1 (optional)

Address 2 (optional)

City (optional)

State (optional)

Zip (optional)

Geocode (optional)

**Credential Information**

Highest Degree Earned

Subject Matter Area

Degree Provider (optional)

**Other Information**

Birth Location (optional)

Residency Status (optional)

Residency Expiration Date (optional)

Mother's Maiden Name (optional)

**Customer Defined Fields**

Street Address Physical (optional)

City Physical (optional)

State (optional)

Zip Code Physical (optional)

Parental Consent Flag (optional)

5. Click Update to save the changes.

Date Of Birth

Social Security Number (optional)

Ethnicity Indicator (optional)

Race Ethnicity1 (optional)

Race 2 Code (optional)

Race 3 Code (optional)

Race 4 Code (optional)

Race 5 Code (optional)

Ethnic Sub Group (optional)

State ID

Degree Provider (optional)

Certificate Number (optional)

Certificate Type (optional)

Physical

Parental Consent Flag (optional)

Defined Field (optional)

Test (optional)

Customer Defined Field 8 (optional)

CDFDATESTEST (optional)

CDFNUMBERTEST (optional)

Parental Consent Flag (optional)

Cancel Update

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

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

- Click the edit icon.

Location Information Details (K12 Student)			Click the edit icon
<b>Barton, Howell and Nolan District</b> (6100000000)	06/01/2023 Last Updated	<b>K12 Student</b> Person Type	<<
<b>Bauch and Sons School</b> (6006500000)			
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			

- Edit the information as needed.

**Location Information Details (K12 Student)**

<b>Barton, Howell and Nolan District</b> <i>(6100000000)</i> <b>Bauch and Sons School</b> <i>(6006500000)</i>	<b>06/01/2023</b> Last Updated	<b>K12 Student</b> 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.

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## Batch Profile

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### *Chapter Highlights*

- [Overview](#)
- [Profile Header](#)
- [Details Tab](#)
- [Download Tab](#)
- [Lesson: 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.

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

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.
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	
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 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.

 <b>Status Statistics</b>	
Match Status	Record Count
<b>Match / No Match (Completed)</b>	
Match	15
<b>Canceled (Completed)</b>	
Canceled - Selected during Match Resolution stage	2
Canceled - During data validation stage	1
<b>Ready to Resolve Near Matches (Pending)</b>	
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.

 <b>Processing Stage</b>	
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.

FIELDS/DATA	DESCRIPTION
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
<input checked="" type="radio"/> Near Match	04/23/2020 13:48	2	2
<input type="radio"/> Near Match Details	04/23/2020 13:48	2	2

**Format**

Download Options:

File Format: Version 3.0

Delimiter:


Qualifier:

Date Format:

Include Header/Footer:

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 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

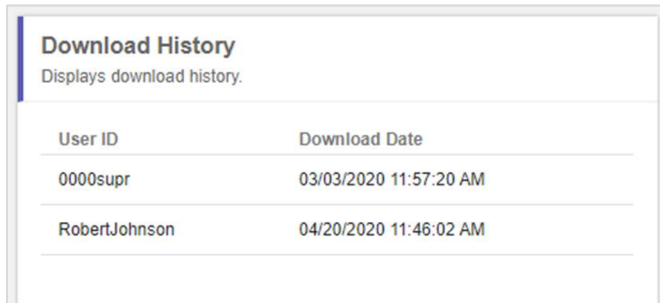
FIELDS/DATA	DESCRIPTION
	downloaded file. Advanced means you can configure what the delimiter, qualifier, date format, etc. is.
File Format	The only option is File Format Version 3.0.
Delimiter	Provides a list of download delimiter options, including comma or tab. One button/option must be selected.
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.



User ID	Download Date
0000supr	03/03/2020 11:57:20 AM
RobertJohnson	04/20/2020 11:46:02 AM

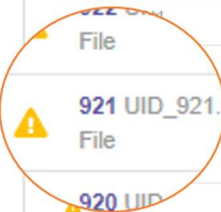
## Lesson: How to Access a Batch Profile

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
 File 921 UID_921. File 920 UID	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	<div style="width: 100%; height: 10px; background-color: #ccc; position: relative;"><div style="width: 100%; height: 100%; background-color: #008000;"></div></div> Pending: Request Queued	Refresh ⋮
	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	<div style="width: 100%; height: 10px; background-color: #ccc; position: relative;"><div style="width: 100%; height: 100%; background-color: #008000;"></div></div> Pending: In Progress	Refresh ⋮
	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	<div style="width: 100%; height: 10px; background-color: #ccc; position: relative;"><div style="width: 100%; height: 100%; background-color: #008000;"></div></div> Pending: In Progress	Refresh ⋮
	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	<div style="width: 100%; height: 10px; background-color: #ccc; position: relative;"><div style="width: 100%; height: 100%; background-color: #008000;"></div></div> Pending: Near Matches	Resolve ⋮
	Multiple Districts Multiple Schools	04/02/2020 3:00 PM	1000 of 190,002 PENDING	<div style="width: 100%; height: 10px; background-color: #ccc; position: relative;"><div style="width: 100%; height: 100%; background-color: #008000;"></div></div> 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	<div style="width: 100%; height: 10px; background-color: #008000;"></div> Completed	⋮

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

**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 Details and Download Tabs

**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. 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
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. 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 | 04/06/2020 3:00 PM Process Info | Pending: In Progress Status

DETAILS DOWNLOAD **Download Tab**

Process Details  
Displays details about processing.

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
<input type="radio"/>	Match	04/23/2020 13:48	80	100
<input type="radio"/>	Ready to Resolve Near Matches	04/23/2020 13:48	2	100
<input checked="" type="radio"/>	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
<input type="radio"/> 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

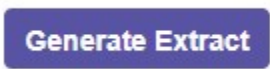
Qualifier: Double Quotes (") **None**

Date Format:

Include Header/Footer: **Yes** No

[Generate Extract](#)

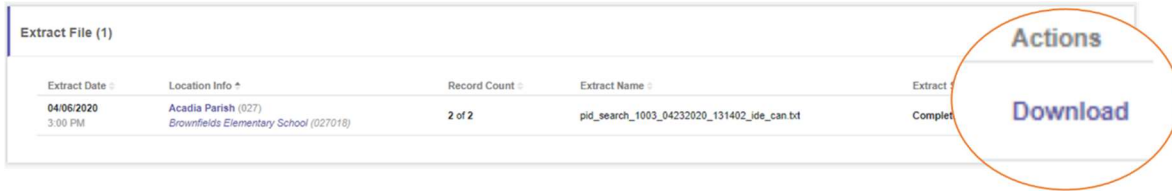
5. Click Generate Extract.



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 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	<a href="#">Download</a>

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](#)

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## Transaction Profile

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### *Chapter Highlights*

- [Overview](#)
- [Profile Header](#)
- [Details Tab](#)
- [Download 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.

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

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\_\*.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	
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.

 <b>Status Statistics</b>	
Match Status	Record Count
<b>Match / No Match (Completed)</b>	
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.

 <b>Processing Stage</b>	
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.

NEXT ACTION	DESCRIPTION
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.
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.

FIELDS/DATA	DESCRIPTION
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.
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.

FIELDS/DATA	DESCRIPTION
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 displays the 'DOWNLOAD' tab interface. 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 a table and a 'Format' section with 'Simple' and 'Advanced' buttons. A 'Generate Extract' button is located below the 'Format' section. The 'Download History' panel displays a table of download records.

Status	Submission Date	Downloadable Record Count	Total Record Count
<input checked="" type="radio"/> Canceled	04/23/2020 13:48	2	6
<input type="radio"/> Fixed Errors	04/23/2020 13:48	1	6
<input type="radio"/> IDs Assigned (Match / No Match)	04/23/2020 13:48	4	6

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.

### Download Options

**Match Status**

Status	Submission Date	Downloadable Record Count	Total Record Count
<input type="radio"/> 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:

Include Header/Footer: Yes No

[Generate Extract](#)

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.

FIELDS/DATA	DESCRIPTION
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**

**Pending - 5 Most Recent**

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**

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**

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

PERSON **DETAILS** DOWNLOAD

**Process Details**

**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  
 Transmission 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	

2. 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
<input checked="" type="radio"/> Match	04/23/2020 13:48	1	1

3. 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
<input type="radio"/> 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:

Include Header/Footer: **Yes** No

[Generate Extract](#)

4. Click Generate Extract.



5. 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

6. 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	<div style="border: 2px solid orange; border-radius: 50%; padding: 10px; display: inline-block;"> <p style="margin: 0;"><b>Actions</b></p> <p style="margin: 0;"><a href="#" style="color: #4a7ebb; text-decoration: none;">Download</a></p> </div>

7. 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](#)

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## Location Profile

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### *Chapter Highlights*

- [Overview](#)
- [Profile Header](#)
- [Details Tab](#)
- [Lesson: 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 shows a user interface for a location profile. At the top, the 'Location Profile Header' contains the location name 'Acadia Parish', its address '2402 N Parkerson Ave, Crowley, LA 70526', contact information 'ron.smith@acadiaparish.com' and '(222) 456-3422', and a summary table with columns for Status (Active), Start Date (8/25/2017), End Date (N/A), and Records (10,550). Below the header is a 'DETAILS' tab and a 'DOWNLOAD PERSON RECORDS' button. The main content area is titled 'General' and 'View General Profile Information'. It is split into two sections: 'Location Information' (District Name: Acadia Parish, District Code: 027, Address: 2402 N Parkerson Ave., City: Crowley, State: Louisiana, Zip: 70526) and 'Contact Information' (First Name: Ron, Last Name: Smith, Title: Superintendent, Email: ron.smith@acadiaparish.com, Phone: (222) 456-3422). A 'Next Steps' sidebar on the right contains a 'Download Person Records for this location' button.

## 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.

This is a smaller version of the header section shown in the screenshot. It includes the location name 'Acadia Parish', address '2402 N Parkerson Ave, Crowley, LA 70526', contact info 'ron.smith@acadiaparish.com' and '(222) 456-3422', and a summary table with columns for Status (Active), Start Date (8/25/2017), End Date (N/A), and Records (10,550). Below the header is a 'DETAILS' tab and a 'DOWNLOAD PERSON RECORDS' button.

FIELDS/DATA	DESCRIPTION
Location Name	Displays the full name, current Address 1, City, State, and Zip Code for the selected location.

FIELDS/DATA	DESCRIPTION
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.

FIELDS/DATA	DESCRIPTION
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 View Past 7 Days | View All >>

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
925 UID_S.txt File	<b>Acadia Parish</b> (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	Pending: Request Queued	Refresh
922 UID_922.txt File	<b>Acadia Parish</b> (027) Brownfields Elementary School (027018)	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. 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	<b>Acadia Parish</b> (027) <i>Brownfields Elementary School (027018)</i>	04/06/2020 3:00 PM	2 of 2 PENDING	<div style="width: 100%; height: 10px; background-color: green;"></div> Pending: Request Queued	Refresh
922 UID_922.txt File	<b>Acadia Parish</b> (027) <i>Brownfields Elementary School (027018)</i>	04/05/2020 3:00 PM	1 of 3 PENDING	<div style="width: 100%; height: 10px; background-color: green;"></div> 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** **8/25/2017** **N/A** **10,550**  
Status Start Date End Date 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 ?

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**Acadia Parish**  
2402 N Parkerson Ave,  
Crowley, LA 70526

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

<b>Active</b> Status	<b>8/25/2017</b> Start Date	<b>N/A</b> End Date	<b>10,550</b> Records
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**DETAILS**   [DOWNLOAD PERSON RECORDS](#)

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**General**  
View General Profile Information

**Click Download Person Records under Next Steps**

**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](#)

4. Click Download.

**Download Options**

**Format**

File Format	Version 3.0
Delimiter	<input checked="" type="radio"/> Tab <input type="radio"/> Comma
Qualifier	<input checked="" type="radio"/> Double Quotes ( " ) <input type="radio"/> None
Date Format	<input type="text" value="mm/dd/yyyy"/>
Include Header/Footer	<input type="radio"/> Yes <input checked="" type="radio"/> No

**Click Download**