



# eScholar®

We know education data.

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## User Guide

### eScholar Uniq-ID® for Students Version 7.x

*Document Version 1.1 – Updated December 17, 2009*

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## ABOUT THIS MANUAL

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

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



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



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

## Definitions, Acronyms, and Abbreviations

State ID: The internal student identifier generated by the eScholar Uniq-ID® for Students system.

SIS: Student Information System.

ID Assignment Process: The eUID system's process of assigning IDs to students. This process includes six main steps: (1) submitting a batch (2) validating the data (3) fixing data errors (4) assigning IDs (5) resolving near matches/matches (6) downloading IDs.

Match Probability: The probability that two student records are the same student.

eScholar Uniq-ID® for Students – the eUID abbreviation is used throughout the application.

Assign Selected – This button is available within the Near Match pages. The label on the button may vary by system. It may also be labeled Match.

Create New ID - This button is available within the Near Match pages. The label on the button may vary by system. It may also be labeled No Match.



CDF – This is used throughout the document to reference Customer Defined Fields.

AFP – This is used throughout the document to reference Automatic File Processing.

Master Data – This is the active record for the student and includes the ID and all of the latest data.

History Record – When a master record is updated, the original data is moved to history and the new data becomes the master data. The system retains all history information for a student. Typically data is updated when a record is submitted, unless the Authoritative Source feature is enabled. Please see Authoritative Source below.



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

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## ABOUT THE APPLICATION

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### Purpose

The eUID system is designed for educational agencies to assign and maintain unique student identifiers. The application allows users to:

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

The system also offers:

- A powerful matching engine that uses complex logic to match students.
- A tracking and logging process for all uploads / submissions of data and changes to the system.
- An easy-to-use interface for all functionality within the system.
- An organized and structured approach to assigning IDs.
- Maintenance and troubleshooting of IDs.
- Secure and role-based access.

## ID Assignment Process

The ID Assignment Process within the eUID system consists of six distinct steps:

1. Submitting the Student Data
2. Validating the Student Data
3. Fixing Data Errors
4. Assigning IDs
5. Resolving Near Matches
6. Downloading IDs

## Logging In

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

The steps to log into the system include:

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

Please enter a Login ID/Password and click on the submit button.



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

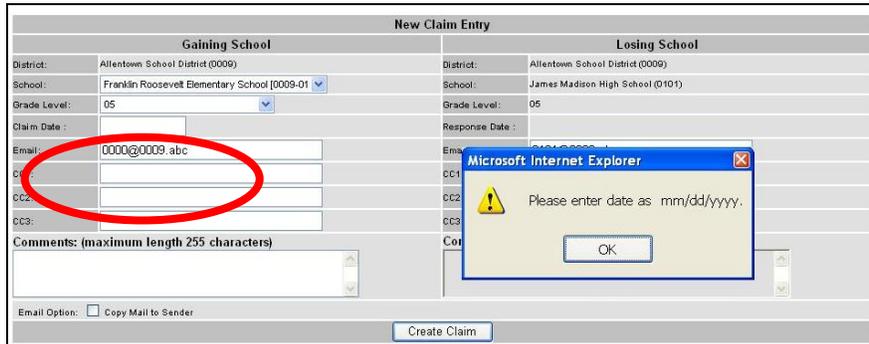


**TIP:** Users should not use the **REFRESH**, **BACK**, or **FORWARD** browser buttons with the eUID system. There are links on every page to direct the user to other screens.

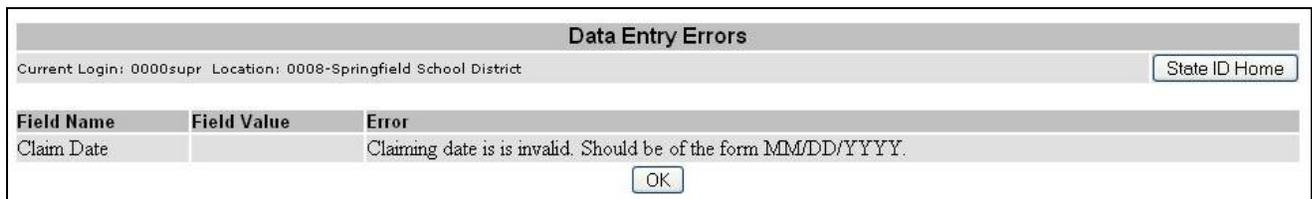
## Section 508 of the Rehabilitation Act Compliance

In order for the eUID system to be fully compliant with Section 508 of the Rehabilitation Act, all functionality must work as intended if client-side scripting languages (e.g., JavaScript) are disabled. Below are some sample screenshots depicting what a user sees with scripting enabled and what is displayed when scripting is disabled.

If a user fails to enter a required field on a page with scripting enabled, the application displays a pop-up message. An example displays below.



If a user fails to enter a required field on a page with scripting disabled, the application navigates to a new page instead of displaying a pop-up message. The error described on the page is similar to the pop-up message. An example displays below.



## Screenshots

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

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## NEW TO VERSION 7.0

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### Display SSN in Various Locations

The SSN can now be displayed on the Student Search details page if configured by the System Administrator. This is only available when SSN masking is disabled. Please contact your System Administrator for details.

### Help Icon

A help icon will be displayed on all pages which have help content. When this icon is clicked, a new pop-up window will be displayed with the content specific to that page.

### File Format Version 2.0 Fields

A new File Format is available with eUID Students Version 7.0. The Version 1.0 File Format will continue to work in eUID Students 7.0. If File Format Version 2.0 is configured by the System Administrator to be the default File Format, the File Format Version 2.0 fields will be displayed throughout the application. If File Format Version 1.0 is the default, the Version 2.0 fields will not be displayed in the application. File Format Version 2.0 includes new fields such as Alternate Last Name, Alternate ID, Alternate Source, and eight Customer Defined Fields. For additional details regarding the File Format specifications, please refer to the File Format documentation.

### Alias ID

The Alias ID feature allows the eScholar Uniq-ID<sup>®</sup> for Students to retain a record of all local identifiers and/or alternate identifiers submitted to the system by their source. That is, each time a new Local Identifier or Alternate ID for an external source system is submitted with the student record, the eScholar Uniq-ID<sup>®</sup> for Students system inserts this information, along with the State ID/unique identifier, into an Alias ID table. Although this functionality is enhanced if the File Format Version 2.0 is utilized, it is not required. This allows for the opportunity to track interstate identifiers.

### Enter Individual Student

The Enter Individual Student form has been updated to allow for a placeholder for Alternate Last Name. Each cell has been moved to the right by one cell. If the File Format Version 2.0 is the default template in System Properties, the Alternate Last Name field, Source System, Alternate ID, Alternate Source, and CDFs will be displayed.



## Alternate ID Search

A new search tab, named Alternate ID Search, has been added to the Search Individual Student component. This option performs a search on the new Alias ID table. The Alias ID feature, as described above, allows the system to retain a record of each Local Identifier or Alternate Identifier submitted to the system. Users can select the source name and enter an identifier in the search box. Please note, this does not search for State IDs.

## Automatic File Processing

A new data submission type is being added in Version 7.0 to allow for automatic processing of data submitted to a secure server location. This feature requires the use of File Format Version 2.0.

## Pre-Population of Online Entry

The Enter Individual Student form can now be pre-populated based upon the authorization of the user entering the information into the form. When this feature is enabled through the System Property component, the system will pre-fill/complete fields on the Enter Individual Student form by role. The information remains editable and can be updated by the user if necessary. The following information is pre-populated by role:

- School Users: Resident District, School Code, School Year, and District Code.
- District Users: Resident District, School Year, and District Code.
- Multi-district users and above: School Year only.

## Add Student from Search

Users can add new students from the Student Search page under certain conditions. The following conditions must be met:

- The role the user belongs to is authorized to access to Add from Search.
- The user enters a valid search on the Student Search page. The search can have no validation errors.
- There is a single match below the Upper Near Match Threshold or no match.

The "Enter New Student" button is displayed to the right of the Submit and Clear buttons in the search form when these conditions are met. When this button is clicked, the information that was submitted in the search form will pre-populate the Enter Individual Student form. This process trumps the Pre-Population of Online Entry mentioned above.



## **Resident District Code Optional**

The Resident District Code can be set to optional by the System Administrator. When the property Make Residential District Optional is set to Yes, the system will not require data to be submitted for this field. The Make Residential District Optional property cannot be enabled if the Allow Submissions by Residential District property is enabled.

## **Special Characters**

The system will allow for Extended ASCII characters in Version 7.0.

## **Near Match Filter**

A new Last Name filter has been added to the Resolve Near Matches/Duplicates page to allow users to filter the near match results list by last name or portion of a last name. That is, if "SM" is entered, all of the students with last names beginning with SM for that batch will be displayed.

## **Near Match Notification**

When configured/enabled by a System Administrator, the Near Match Notification component sends an email to the appropriate school/district contacts for pending near matches. The report is sent to users in PDF format, contains summary information, and district, school and/or batch information. No student information is provided in these reports.

## **Authoritative Source**

All of the source systems submitting data to the eUID system are defined and configured by a System Administrator. This configuration includes a Reliability Score for each source system. When data is submitted to the eUID system, the file includes information on the source system submitting the data. The eUID system processes the data through the 6 step assignment process and uses the source information in the file to determine the authority of the data. If the submission source system has the same or higher reliability score than the existing master record, the data will be updated and a history record will be created. If the submission source system has a lower score the existing master record, the data will not be updated and no history is created.

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## FEATURES OVERVIEW

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### Home Page

The Home Page provides users with easy access to previously submitted batches and to the application menu. Most pages throughout the application contain an State ID Home button in the top right corner of the application to access the home page.

### Upload Batch File

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

### Enter Individual Student

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

### Student Search

This feature allows a user to search for students through an online interface. This function can be used to verify the details of a student already in the eUID system.

### Batch Search

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

### Extract & Download Batch

This feature provides users with the ability to extract and download six different types of output files from the ID System:

- Errors to Fix
- Near Matches/Duplicates to Resolve
- IDs Assigned
- Canceled Records
- Rejected Student Batch Files
- Fixed Records



## **Claiming Process**

This feature provides users the ability to handle situations when a student transfers from one school/district to another within the state. It provides a mechanism for the schools involved to communicate with each other through automatic emails regarding the transferring student.

## **Download by Location**

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

## **Exit Application**

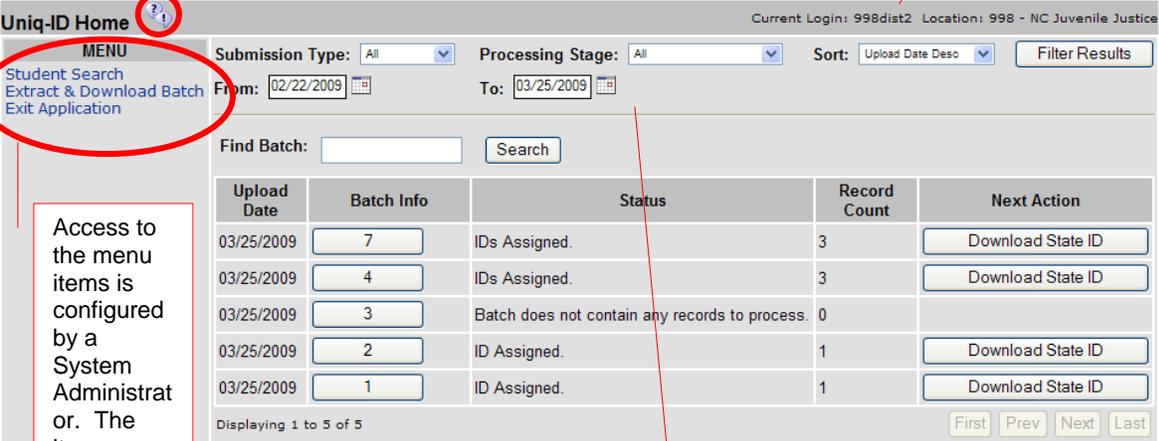
This link allows users to log out of the application. By using the Exit Application link, all sessions for the user are closed.

## HOME PAGE

Once a user successfully logs into the system, the eUID system home page will be displayed. The home page is also accessible throughout the application by clicking the **STATE ID HOME** button. The Home page allows users to:

- Access system components / menu items.
- View previously submitted batches.
- Filter batches.
- Find batches.
- Perform Next Action steps.

Indicates the current login and location.



Access to the menu items is configured by a System Administrator. The items displayed will vary by user role.

Filter by Submission Type, Processing Stage, Date Range, or by Batch.

Upload Date	Batch Info	Status	Record Count	Next Action
03/25/2009	7	IDs Assigned.	3	Download State ID
03/25/2009	4	IDs Assigned.	3	Download State ID
03/25/2009	3	Batch does not contain any records to process.	0	
03/25/2009	2	ID Assigned.	1	Download State ID
03/25/2009	1	ID Assigned.	1	Download State ID

## Accessing Feature Menu Items

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

To access the menu items, users should click on the appropriate feature link. All of the features listed on the menu above are described in further detail later in this document.



**NOTE:** The **STATE ID HOME** button, provided on all other screens within the application, redirects the user to the main page.

## Viewing Previously Submitted Batches

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

**State ID Home** Current Login: 0101usr1 Location: 0009 - James Madison High School

**MENU**  
[Upload Batch File](#)  
[Enter Individual Student](#)  
[Student Search](#)  
[Batch Search](#)  
[Extract & Download Batch](#)  
[Claiming Process](#)  
[Download By Location](#)  
[Exit Application](#)

Submission Type:  Processing Stage:  Sort:

From:  To:

Find Batch:

Upload Date	Batch Info	Status	Record Count	Next Action
01/24/2008	<input type="button" value="268"/>	Near Matches / Duplicates Found	1	<input type="button" value="Resolve Near Matches"/>
01/24/2008	<input type="button" value="266"/>	Data Validation Incomplete. Fix Data Errors	8	<input type="button" value="Fix Errors"/>
01/24/2008	<input type="button" value="265"/>	Data Validation Complete. Ready to Assign State IDs	1	<input type="button" value="Assign State ID"/>

Displaying 1 to 3 of 3

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

The current **Status** of the submission

The number of records to be addressed in the next action

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



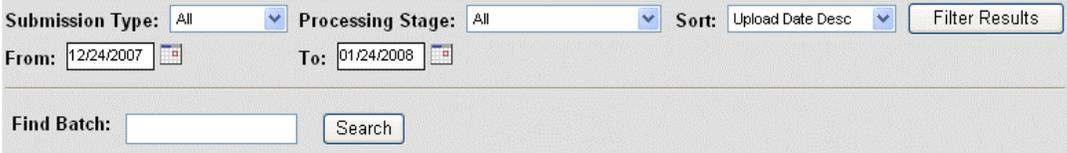
**NOTE:** The status column always displays the current status of the batch being processed and guides the user to the next action to be performed. The **NEXT ACTION** column has a button that enables the user to initiate the next action. For AFP batches there will be no Fix Errors Next Action button.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



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

## Filtering Batches

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



The screenshot shows a filtering interface with the following elements:

- Submission Type:** A dropdown menu currently set to "All".
- Processing Stage:** A dropdown menu currently set to "All".
- Sort:** A dropdown menu currently set to "Upload Date Desc".
- Filter Results:** A button to apply the filters.
- From:** A date input field set to "12/24/2007".
- To:** A date input field set to "01/24/2008".
- Find Batch:** A text input field followed by a "Search" button.

- **Submission Type:** The options are All, File, Online, SLF, Edit, WebService, and Automation.
- **Processing Stage:** The options are All, Validate Data, Fix Errors, Assign State ID, Resolve Near Matches, Download State ID, Canceled, Validation in Progress, Assignment in Progress, Continue Validation, or Continue Assignment.
- **Submission Date:** Expects valid date ranges.
- **Sort:** Users can sort by Upload Date, Batch Number, or Batch Status.

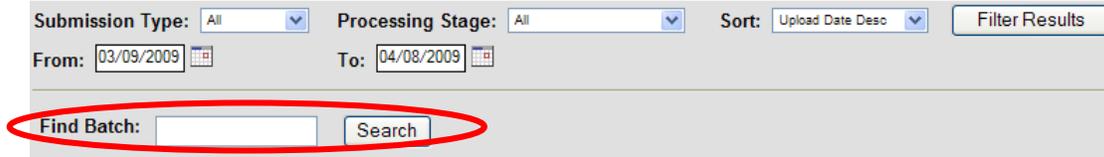
To apply filters to the batch list, users should perform the following steps:

1. Access the Home page by either logging in or clicking the **STATE ID HOME** button.
2. Click the dropdown arrow and select the appropriate option for each of the filters.
3. Click the **FILTER RESULTS** button.
4. The screen will refresh and limit the results based on the filters.

## Finding a Batch

The **Find Batch** feature, located immediately above the list of submissions on the application's main page, allows users to view and work on a specific batch. The Home page displays the Batch ID for each batch on the list. This Batch ID is unique to the

batch and can be used for finding a batch. To search for a batch, users should enter a Batch Id in the **Find Batch** field and then click the **SEARCH** button.



Submission Type: All Processing Stage: All Sort: Upload Date Desc Filter Results

From: 03/09/2009 To: 04/08/2009

**Find Batch:**

If the application finds a matching batch, the system will display the page listing only that batch in the Batch List.

Current Login: 0000supr Location: 0009 - Allentown School District

Submission Type: All Processing Stage: All Sort: Upload Date Desc Filter Results

From: 12/24/2007 To: 01/24/2008

Find Batch:

Upload Date	Batch Info	Status	Record Count	Next Action
01/22/2008	257	Data Validation Incomplete. Fix Data Errors	1	<input type="button" value="Fix Errors"/>

If the application cannot find the batch the user specifies, the system will display a message stating that no batches were found.

Current Login: 0000supr Location: 0009 - Allentown School District

Submission Type: All Processing Stage: All Sort: Upload Date Desc Filter Results

From: 12/24/2007 To: 01/24/2008

Find Batch:

Upload Date	Batch Info	Status	Record Count	Next Action
No Batches Found.				

If the application finds the batch the user specifies but the user does not have the appropriate rights to view the batch, the system will display a message stating the user is not authorized to view the batch.

Current Login: 0101usr1 Location: 0009 - James Madison High School

Submission Type: All Processing Stage: All Sort: Upload Date Desc Filter Results

From: 12/24/2007 To: 01/24/2008

Find Batch:

Upload Date	Batch Info	Status	Record Count	Next Action
You are not authorized to see this batch.				

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

Current Login: 0000multidist Location: 0000 - State Department of Education

Submission Type: All Processing Stage: All Sort: Upload Date Desc Filter Results

From: 12/24/2007 To: 01/24/2008

Find Batch:  Search

Upload Date	Batch Info	Status	Record Count	Next Action
Click <a href="#">here</a> to change your current district to: ( 0009 - 0000 ) and go to batch: 264				

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



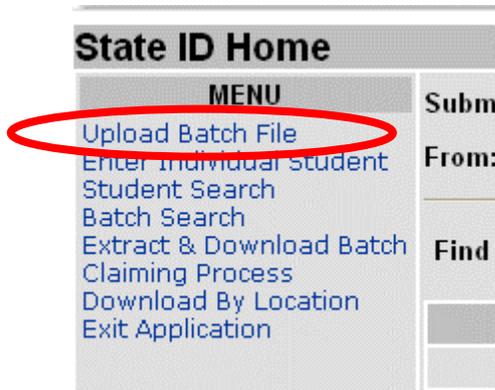
**TIP:** The application includes a Help button on pages with Help content available. This help content can be accessed by clicking the  Help icon. When the Help icon is clicked, a pop-up window will display the Help content.

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## UPLOAD BATCH FILE

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Users can process a batch file for ID Assignment by clicking the **Upload Batch File** link in the *Menu*:



This feature allows users to:

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

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

### Uploading a Student Batch File

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

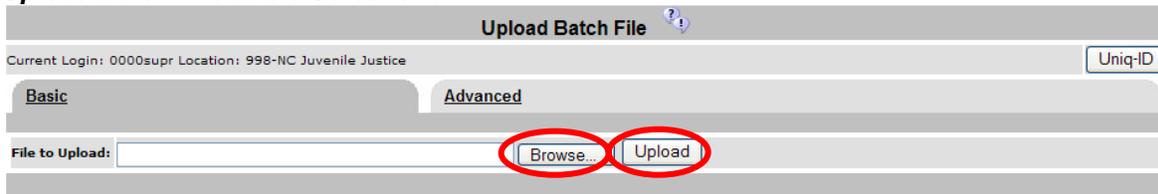
The Advanced option allows users to define the input file information in the eUID system rather than in the file itself. With the Advanced option upload, users can select the template, file to upload, field delimiter, field qualifier, and whether or not to ignore the first row.

#### **Basic Upload:**

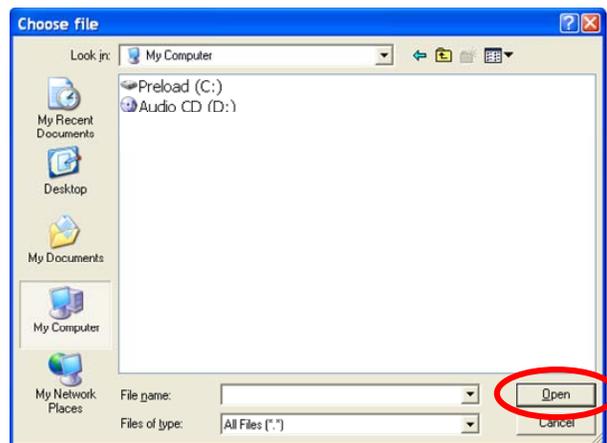
To upload a Student Batch file, users should follow these steps:

1. Click on the **Upload Batch File** link in the *Menu*.
2. Access the “Basic” tab.
  - The system should default to the Basic tab, if the tab is not selected, click on the Basic tab to access this upload option.

### Upload Batch File Basic Screenshot

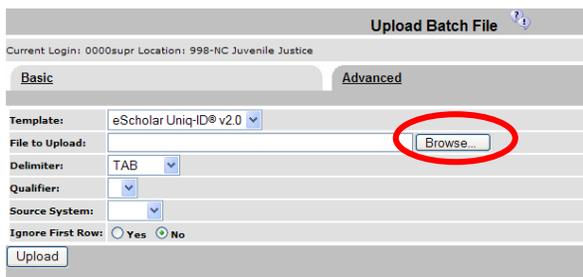


3. Click the **BROWSE** button to view the local computer system directory structure. The file must be located on the local computer system in order to upload the file.
4. Browse through the directory structure and choose the directory/folder where the batch file is stored.



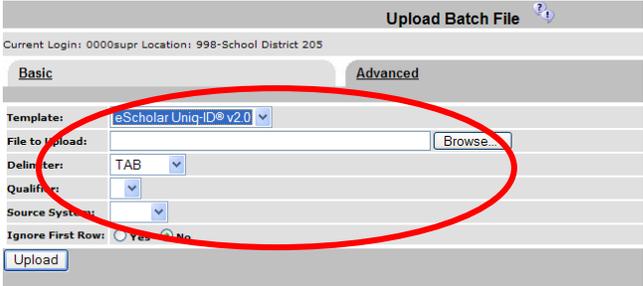
5. Select the appropriate file from the local system and click the **OPEN** button.
6. Click the **UPLOAD** button. This uploads the file listed in the “File to Upload” field to the eUID system server for subsequent processing.

### Advanced Upload



1. Click on the **Upload Batch File** link on the *Menu*.

2. The Upload Batch File component will default to the “Basic” tab. Select the “Advanced” tab.
3. Select the appropriate Template. Currently the only templates available are eScholar Uniq-ID® v1.0 and eScholar Uniq-ID® v2.0.
4. Click **BROWSE** to view the local computer system directory structure. The file must be located on the local computer or network drive in order to upload the file.
5. Browse through the directory structure and choose the directory/folder where the batch file is stored. Select the appropriate file from the local system and click the **OPEN** button.
6. Select the appropriate “Delimiter” for the file. The options available are:
  - Comma
  - Tab
7. Select the appropriate “Qualifier” for the file. The options available are “ or ‘.
8. For eScholar Uniq-ID® v2.0 (File Format Version 2.0), users must select a Source System. If eScholar Uniq-ID® v1.0 is used, no Source System should be selected.
9. Select the appropriate “Ignore First Row” option for the file. The options are “Yes” or “No”. When “Yes” is selected, the first row in the input file will be ignored during the upload processing. When “No” is selected, the first row will be included in the upload processing. When “Yes” is selected, the row is still counted in the record count provided in Batch Info, but the record is not processed.
10. Click the **UPLOAD** button. This uploads the file to the eUID system server for subsequent processing.



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

### **File Upload Failure**

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

Upload Batch File				
Current Login: 0000supr Location: 0009-Allentown School District				State ID Home
Upload Date	Batch Info	Status	Number of Records	Next Action
		<p>File Upload failed for the following reasons: The header record in the uploaded file is missing at least one field.</p> <p>The uploaded file does not appear to be for this application. The uploaded file does not contain a trailer record.</p> <p>The file you attempted to upload has been saved to the database and can be downloaded using the Extract &amp; Download Batch feature. The batch number assigned to this file is 238 Fix The Above Errors And Resubmit New File Contact DE for Assistance.</p>		Upload New File



**NOTE:** The application will store all rejected Student Batch Files in the database when there is a fatal file error. Users can download all such files with the **Extract & Download Batch** module. The above screen will provide a batch number that can be used to find the file in **Extract & Download Batch**.

### File Upload Success

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

Upload Batch File				
Current Login: 0009admin Location: 0009-Allentown School District				State ID Home
Upload Date	Batch Info	Status	Record Count	Next Action
06/13/2006	42	File Uploaded. Begin Validation Stage	12	Validate Data

Batch Info button

The current status of the batch file

The number of records that will be involved in the next action

### **Batch Information**

Once a batch has been submitted, users can click the “**Batch Info**” button (see graphic above) to display the status of the batch file. This button will display the batch number for that batch. This information can be displayed at any point during the batch process. A pop-up window similar to the following will be displayed when the button is clicked:

Batch Information : Batch 233	
Batch Statistics	Processing Info
Batch Number	233
Submission Type	File
Batch Status	DATA ERRORS PENDING
District Code	0009
School Code	0000
Extract Date	10/31/2007
Extract File	DataErrors3.txt
Transmission ID	0071262134
Creation User ID	0000supr
Creation Date	01/18/2008
Total Records	9
Record Delimiter	0x09
Header Delimiter	0x09
File Version	1.0



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



**NOTE:** For a full explanation of the different sections or tabs of the **Batch Info** window, please see **Appendix A**.

## Validating Data

Once a file has passed file validation, the next step is data validation. This process loads the records in the batch file into the staging database tables, where further validation checks are performed on the data. This includes validation of valid values such as dates and codes, user authorization for submitted records, and possible claims. This step will produce validation errors (validation failure) or will allow the user to proceed to the next step of assigning IDs.

To validate data users should perform the following steps:

1. Upload a batch as described above.
2. Click the **VALIDATE DATA** button.
3. A validate data screen will be displayed. View the batch and validation details as needed.

Validate Data				
Current Login: 0000supr Location: 0009-Allentown School District				State ID Home
Upload Date	Batch Info	Status	Number of Records	Next Action
01/18/2008	236	Data Validation is in progress.	In Progress	Check for completion later.

4. Click the **STATE ID HOME** button to return to the main page to check for the updated status of the process.

Current Login: 0000supr Location: 0009 - Allentown School District

Submission Type:  Processing Stage:  Sort:

From:  To:

Find Batch:

Upload Date	Batch Info	Status	Record Count	Next Action
01/18/2008	<input type="text" value="234"/>	Data Validation Incomplete. Fix Data Errors	8	<input type="button" value="Fix Errors"/>
01/18/2008	<input type="text" value="236"/>	Data Validation Incomplete. Fix Data Errors	1	<input type="button" value="Fix Errors"/>



**NOTE:** If no errors are found during the validation process, the system navigates to the ID assignment screen. If errors are found, the **Fix Errors** button will be displayed.



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



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

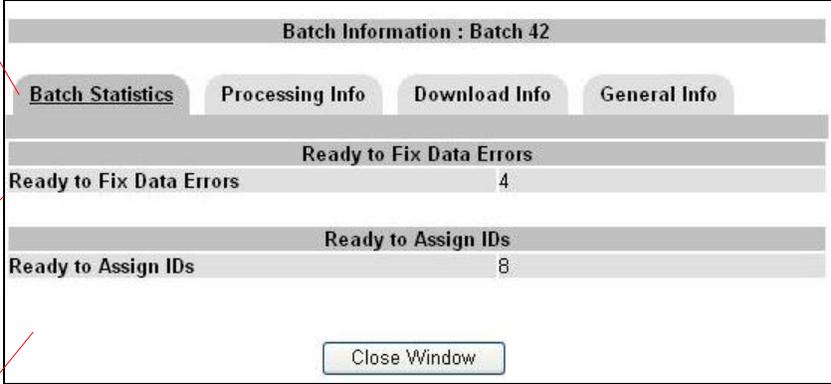
## **Batch Information**

To view specifics about the batch, users can click the button in the *Batch Info* column. This Batch Information pop-up screen will display a Batch Statistics tab. This tab will display information on the status of the batch and the number of records the status applies to.

The *Batch Statistics* tab will group records in the file according to where they are within the ID Assignment process. For a full list of all statuses and their groups, please see Appendix B.

This displays the number of records in the batch file that have data errors and need to be fixed.

This displays the number of records in the batch file that have passed data validation.



Batch Information : Batch 42	
<b>Batch Statistics</b>	Processing Info
Download Info	General Info
Ready to Fix Data Errors	
Ready to Fix Data Errors	4
Ready to Assign IDs	
Ready to Assign IDs	8
Close Window	

For more details on batch information, refer to Appendix A.

## Fixing Validation Errors

If the batch file contained one or more records that failed validation, the main page will display a **FIX ERRORS** button in the Next Action column:

Current Login: 0000supr Location: 0009 - Allentown School District

Submission Type: All Processing Stage: All Sort: Upload Date Desc Filter Results

From: 12/18/2007 To: 01/18/2008

Find Batch: Search

Upload Date	Batch Info	Status	Record Count	Next Action
01/18/2008	236	Data Validation Incomplete. Fix Data Errors	1	Fix Errors
01/18/2008	234	Data Validation Incomplete. Fix Data Errors	8	Fix Errors

This value represents the number of records that have data errors.

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

### Fix Errors

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

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

Current Login: 0009admin Location: 0009-Allentown School District State ID Home

Select All In Page Cancel All Checked Records Cancel All Error Records For This Batch

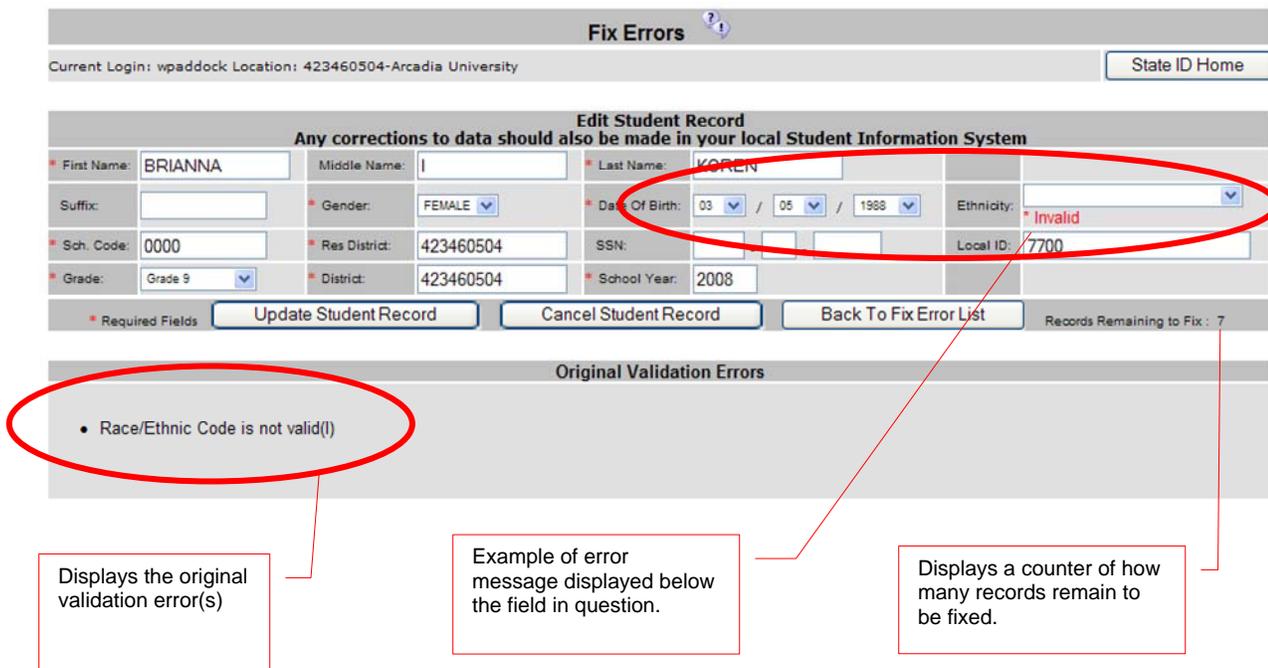
	Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	
<input type="checkbox"/>	DENNIS	TRAVIS				MALE	Edit
<input type="checkbox"/>	EDWARDS	HANNAH	F		11/10/1994	FEMALE	Edit
<input type="checkbox"/>	LEEPER	SHENNA	N		04/03/1988	FEMALE	Edit
<input type="checkbox"/>	LEISTMAN	ERIC	J		04/22/1994	MALE	Edit

Displaying 1 to 4 of 4 First Prev Next Last

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



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



**Fix Errors**

Current Login: wpaddock Location: 423460504-Arcadia University State ID Home

**Edit Student Record**  
Any corrections to data should also be made in your local Student Information System

* First Name: BRIANNA	Middle Name: I	* Last Name: KOREN	
Suffix:	* Gender: FEMALE	* Date Of Birth: 03 / 05 / 1988	Ethnicity: <span style="color: red;">* Invalid</span>
* Sch. Code: 0000	* Res District: 423460504	SSN:	Local ID: 7700
* Grade: Grade 9	* District: 423460504	* School Year: 2008	

\* Required Fields Update Student Record Cancel Student Record Back To Fix Error List Records Remaining to Fix : 7

**Original Validation Errors**

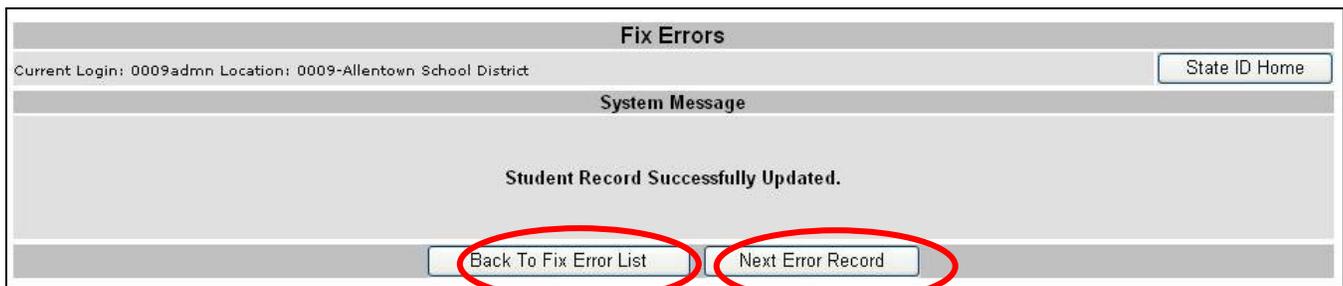
- Race/Ethnic Code is not valid(!)

Displays the original validation error(s)

Example of error message displayed below the field in question.

Displays a counter of how many records remain to be fixed.

- Correct all of the error fields by entering valid values.
- Click the **UPDATE STUDENT RECORD** button.
- The system will display a confirmation page indicating that the error was successfully fixed or will return to the Fix Errors form until all issues are resolved.



**Fix Errors**

Current Login: 0009adm Location: 0009-Allentown School District State ID Home

**System Message**

Student Record Successfully Updated.

Back To Fix Error List Next Error Record

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

**Fix Errors**

Current Login: 0009admn Location: 0009-Allentown School District State ID Home

**System Message**

Student Record Successfully Updated.

**Proceed To ID Assignment**



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

### Cancel Records

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

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

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

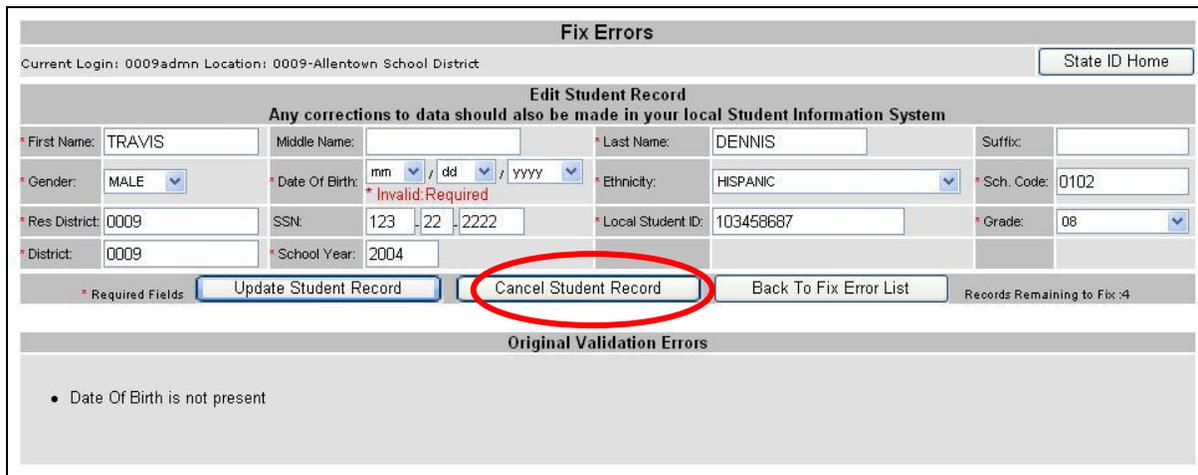
**Fix Errors list page screenshot:**




**NOTE:** The list of records with data errors may span two or more pages. The **Cancel All Records for This Batch** button can be used to cancel all of the error records, even those listed on other pages.

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

**Fix Errors detail page screenshot:**




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

## Assigning IDS

After all validation errors are addressed, either by fixing or canceling the student record, the screen below displays. ID assignment can now be started.

Fix Errors				
Current Login: 0009admn Location: 0009-Allentown School District				State ID Home
Upload Date	Batch Info	Status	Record Count	Next Action
06/13/2006	42	Data Validation Complete. Ready to Assign State IDs	11	Assign State ID

To assign IDs, users should perform the following steps:

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

Assign IDs				
Current Login: 0000supr Location: 0009-Allentown School District				State ID Home
Upload Date	Batch Info	Status	Number of Records	Next Action
01/09/2008	196	ID Assignment is in progress.	In Progress	Check for completion later.

2. To review the updated status of the assignment process, return the system home page by clicking the **STATE ID HOME** button.
3. Review the “Status” column for the updated status or click the “Batch Info” button to review batch information. See Batch Information section below for more details about the “Batch Info” button.
4. Review the “Next Action” column for the appropriate next step(s).

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

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



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

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



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

5. Complete the “Next Action” step by clicking the appropriate button.

- a. If one or more Near Matches are encountered, the “Status” for the batch will be “Near Matches / Duplicates Found” and the “Next Action” column will display a **RESOLVE NEAR MATCHES** button:

01/09/2008	<input type="text" value="190"/>	IDs Assigned	1	<input type="button" value="Download State ID"/>
01/09/2008	<input type="text" value="189"/>	Near Matches / Duplicates Found	1	<input type="button" value="Resolve Near Matches"/>

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

01/09/2008	<input type="text" value="190"/>	IDs Assigned	1	<input type="button" value="Download State ID"/>
01/09/2008	<input type="text" value="189"/>	Near Matches / Duplicates Found	1	<input type="button" value="Resolve Near Matches"/>



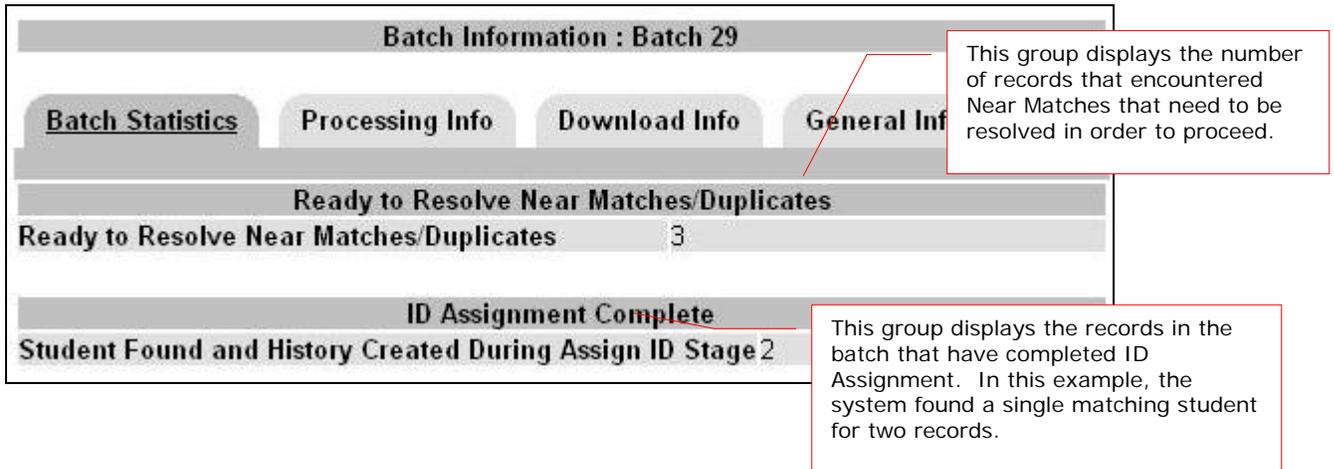
**NOTE:** With some installations the application could also create a claim for one or more records within a batch. This is called Auto Claiming. When this feature is enabled, the application automatically generates a claim for the student record. Once the claim is created, the record is removed from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



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

### Batch Information

Users can click **BATCH INFO** to display the status of the batch file and its records. A pop-up window similar to the following displays:



**Batch Information : Batch 29**

**Batch Statistics** | Processing Info | Download Info | General Info

**Ready to Resolve Near Matches/Duplicates**  
Ready to Resolve Near Matches/Duplicates 3

**ID Assignment Complete**  
Student Found and History Created During Assign ID Stage 2 2

This group displays the number of records that encountered Near Matches that need to be resolved in order to proceed.

This group displays the records in the batch that have completed ID Assignment. In this example, the system found a single matching student for two records.

### Resolving Near Matches

All Near Match records must be resolved before the user can continue to the next step in the ID Assignment process. Near Match records can be resolved by assigning an ID, creating a new ID, or by canceling the record(s).

#### Processing Near Matches

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

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

01/09/2008	190	IDs Assigned	1	Download State ID
01/09/2008	189	Near Matches / Duplicates Found	1	Resolve Near Matches

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

**Resolve Near Matches / Duplicates**

Current Login: 0000supr Location: 998-NC Juvenile Justice Uniq-ID

Select All In Page Cancel All Checked Records Cancel All Near Match Records For This Batch

Last Name:  Filter Results

	Last Name	First Name	Middle Name	Alt Last Name	Suffix	Date Of Birth	Gender	District Code	School Code	Res District Code	
<input type="checkbox"/>	<a href="#">Harmant</a>	<a href="#">Johanna</a>				11/05/1983	Female	998	702	998	<a href="#">Review and Select</a>
<input type="checkbox"/>	<a href="#">Harmant</a>	<a href="#">Johanna</a>				11/05/1983	Male	998	702	998	<a href="#">Review and Select</a>

Displaying 1 to 2 of 2 First Prev Next Last

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



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

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

**Resolve Near Matches / Duplicates**

Current Login: superuser Location: 423460504-Arcadia University State ID Home

Student Record to Review and Select.

Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District	School
<a href="#">HAEFFNER</a>	<a href="#">SCOT</a>	L		01/03/1993	MALE	423460504	0000

Near Matches / Duplicates Found.

Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District	School	Match Probability
<a href="#">HAEFFNER</a>	<a href="#">SCOT</a>			01/03/1993	MALE	423460504	<a href="#">9999</a>	91 [NEAR MATCH]

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

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

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

- Click the hyperlinked **Last Name** or **First Name** to view the Compare Student Information page. The page, as shown below, displays the submitted student at the top of the page and the matching student at the bottom of the page.

Compare Student Information									
Current Login: superuser Location: 423460504-Arcadia University									State ID Home
Student Record being reviewed.									
First Name:	SCOT	Middle Name:	L	Last Name:	HAEFFNER				
Suffix:		District:	423460504 Arcadia University	School:	<i>0000 Arcadia University</i>				
Gender:	MALE	Date Of Birth:	01/03/1993	Ethnicity:	American Indian/ Alaskan Native	Sch. Yr.:	2008		
Res District:	423460504	SSN:	Not Present	Local ID:	11844443	Grade:	Grade 1		
Created:	12/17/2009	Last Updated:	12/17/2009	Serial#:	8111488	State ID:			
Comments:	2124295772								
Near Match / Duplicate Student [ State ID: 2124295772 - 01.0 ] <a href="#">Add Note</a>									
First Name:	SCOTT	Middle Name:		Last Name:	HAEFFNER				
Suffix:		District:	423460504 Arcadia University	School:	<i>9999 Arcadia Main Campus</i>				
Gender:	MALE	Date Of Birth:	01/03/1993	Ethnicity:	American Indian/ Alaskan Native	Sch. Yr.:	2010		
Res District:	423460504	SSN:	Not Present	Local ID:	11844443	Grade:	Grade 1		
Created:	12/11/2009	Last Updated:	12/17/2009	Serial#:	8111414	State ID:	2124295772		
Matching Note:									
Return to List of Near Matches									

Background shading and/or italicized text indicates that the values for that field differ between the two students.



**TIP:** All fields in which the information differs between two students is highlighted as follows:

- Values in the fields, if any, are italicized.
- Background color for the field is yellow.



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



**NOTE:** The screen above will include additional fields if the default File Format is Version 2.0.



**NOTE:** Users can add Student Notes from the page above. For more information on Student Notes, please refer to the **Claiming Process** or **Search Individual Student** sections.



**TIP:** The **Compare Student Information** page has a Matching Note section under the matching student's information. That section will display a message when the information for the matching student has changed after the particular Near Match was created.

- Click the **RETURN TO LIST OF NEAR MATCHES** button to return to the Resolve Near Matches / Duplicates details page.
- View additional details if necessary. On the Resolve Near Matches/Duplicates interface, users can view information about the school of the matching student by clicking the link in the School Code column:

**Resolve Near Matches / Duplicates** 

Current Login: superuser Location: 423460504-Arcadia University State ID Home

Student Record to Review and Select.							
Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District	School
HAEFFNER	SCOT	L		01/03/1993	MALE	423460504	0000
<a href="#">Assign Selected</a>		<a href="#">Create New ID</a>		<a href="#">Cancel Record</a>		<a href="#">Select Another Record</a>	

Near Matches / Duplicates Found.									
	Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District	School	Match Probability
<input type="radio"/>	<a href="#">HAEFFNER</a>	<a href="#">SCOTT</a>			01/03/1993	MALE	423460504	<a href="#">9999</a>	91 [NEAR MATCH]

**SCHOOL INFORMATION**

District	009
District Name	Allentown School District
School	101
School Name	James Madison High School
Street	
City	Mock City
State	XL
Zip	10605
Contact	Mr. Principal
Title	Principal
Phone	2125550000
Fax	2126660000
Email	<a href="mailto:0101@0009.abc">0101@0009.abc</a>

[Close Window](#)

- Decide how the near match will be resolved. As mentioned above, to resolve a near match a user can assign an ID, create a new ID or cancel the record.

**Resolve Near Matches / Duplicates** 

Current Login: superuser Location: 423460504-Arcadia University State ID Home

Student Record to Review and Select.							
Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District	School
HAEFFNER	SCOT	L		01/03/1993	MALE	423460504	0000
<a href="#">Assign Selected</a>		<a href="#">Create New ID</a>		<a href="#">Cancel Record</a>		<a href="#">Select Another Record</a>	

	Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District	School	Match Probability
<input type="radio"/>	<a href="#">HAEFFNER</a>	<a href="#">SCOTT</a>			01/03/1993	MALE	423460504	<a href="#">9999</a>	91 [NEAR MATCH]

- a) If the student under review is the same as one of the matching students, the user should select the radio button to the left of the matching student and then click **ASSIGN SELECTED**.
- b) If the student under review is different from the matching students, the user should click **CREATE NEW ID**.
- c) If the user wishes to cancel the record under review, the user should click the **CANCEL RECORD** button.
- d) Users can also navigate back to the list of Near Matches by clicking **SELECT ANOTHER RECORD**.



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

### Canceling Near Matches

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

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

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

**Resolve Near Matches / Duplicates** ?

Current Login: superuser Location: 423460504-Arcadia University State ID Home

Select All On Page
 **CANCEL ALL CHECKED RECORDS**
**CANCEL ALL NEAR MATCH RECORDS FOR THIS BATCH**

Last Name:  Filter Results

Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District Code	School Code	Res District Code	
<input type="checkbox"/> HAEFFNER	SCOT			01/03/1993	MALE	423460504	0000	423460504	Review and Select
<input type="checkbox"/> LE	LYN	3		01/09/1987	FEMALE	423460504	0000	423460504	Review and Select
<input type="checkbox"/> MOOIZ	MELONY	Roni		10/02/1994	FEMALE	423460504	0000	423460504	Review and Select
<input type="checkbox"/> MORIARITI	MICHAEL			09/22/1997	MALE	423460504	0000	423460504	Review and Select
<input type="checkbox"/> RODOLPH	CURTIS	B		06/27/1996	MALE	423460504	0000	423460504	Review and Select
<input type="checkbox"/> WOOD	DOROTHY	Susan		03/04/1989	FEMALE	423460504	0000	423460504	Review and Select

Displaying 1 to 6 of 6 First Prev Next Last



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

Once all records are resolved, the next step in the process is to download the ID.

## Filtering Near Matches

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

Example of the list before the filter:

Resolve Near Matches / Duplicates									
Current Login: superuser Location: 423460504-Arcadia University									State ID Home
<input type="checkbox"/> Select All On Page		Cancel All Checked Records			Cancel All Near Match Records For This Batch				
Last Name:									Filter Results
Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District Code	School Code	Res District Code	
<input type="checkbox"/> HAEFFNER	SCOT	L		01/03/1993	MALE	423460504	0000	423460504	Review and Select
<input type="checkbox"/> LE	LYN	3		01/09/1987	FEMALE	423460504	0000	423460504	Review and Select
<input type="checkbox"/> MOOTZ	MELONY	Roni		10/02/1994	FEMALE	423460504	0000	423460504	Review and Select
<input type="checkbox"/> MORIARITI	MICHAEL			09/22/1997	MALE	423460504	0000	423460504	Review and Select
<input type="checkbox"/> RODOLPH	CURTIS	B		06/27/1996	MALE	423460504	0000	423460504	Review and Select
<input type="checkbox"/> WOOD	DOROTHY	Susan		03/04/1989	FEMALE	423460504	0000	423460504	Review and Select

Displaying 1 to 6 of 6

First Prev Next Last

Example of the list with a filter of “Rod”:

Resolve Near Matches / Duplicates									
Current Login: superuser Location: 423460504-Arcadia University									State ID Home
<input type="checkbox"/> Select All On Page		Cancel All Checked Records			Cancel All Near Match Records For This Batch				
Last Name: Rod									Filter Results
Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District Code	School Code	Res District Code	
<input type="checkbox"/> RODOLPH	CURTIS	B		06/27/1996	MALE	423460504	0000	423460504	Review and Select

Displaying 1 to 1 of 1

First Prev Next Last

## Downloading IDS

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

Current Login: 0000supr Location: 009 - Allentown School District

Submission Type: All Processing Stage: All Sort: Upload Date Desc Filter Results

From: 12/22/2007 To: 01/21/2008

Find Batch: Search

Upload Date	Batch Info	Status	Record Count	Next Action
01/21/2008	802	ID Assigned.	1	Download State ID

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

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

Download ID

Current Login: 0009admn Location: 0009-Allentown School District

State ID Home

Upload Date	Batch Info	Status	Record Count	Next Action
06/13/2006	42	File Extract Complete. Click <a href="#">here</a> to download the file.	11	Return To State ID Home

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



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

### Batch Information

Users can click **BATCH INFO** to display the status of the batch file and its records. A pop-up window similar to the following displays:

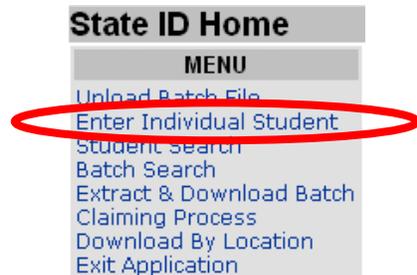
Batch Information : Batch 42	
<b>Batch Statistics</b>	Processing Info    Download Info    General Info
ID Assignment Complete	
New ID Assigned - No Matching Record Found	10
Student Found and History Created During Assign ID Stage 1	
Canceled	
Canceled During Fix Errors Stage	1
<input type="button" value="Close Window"/>	

This group displays the number of records that completed ID Assignment. In this example, 10 records were assigned a brand new ID and 1 record found a single matching student.

This group displays the records in the batch that have been canceled. In this example, one record was canceled during the Fix Errors step.

## ENTER INDIVIDUAL STUDENT

Users can process a single student record for ID Assignment by clicking the **Enter Individual Student** link in the *Menu*:



This feature allows users to:

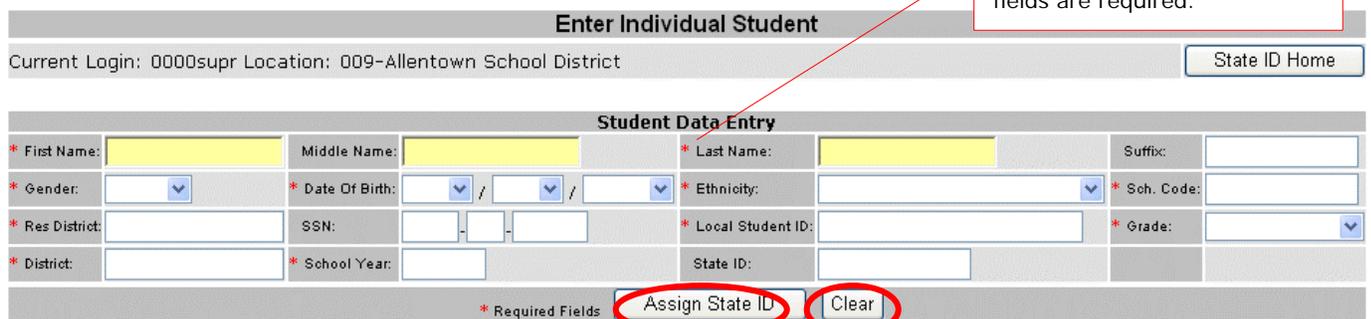
- Manually enter one student at a time.
- Validate and fix data.
- Assign IDs.
- Resolve Near Matches.
- Download IDs.

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

## Entering Individual Students

To enter students online, users should perform the following steps:

1. Click the **Enter Individual Student** link on the *Menu*.
2. Complete the “Enter Individual Student” form.



**Enter Individual Student**

Current Login: 0000supr Location: 009-Allentown School District State ID Home

**Student Data Entry**

* First Name:	<input type="text"/>	Middle Name:	<input type="text"/>	* Last Name:	<input type="text"/>	Suffix:	<input type="text"/>
* Gender:	<input type="text"/>	* Date Of Birth:	<input type="text"/> / <input type="text"/> / <input type="text"/>	* Ethnicity:	<input type="text"/>	* Sch. Code:	<input type="text"/>
* Res District:	<input type="text"/>	SSN:	<input type="text"/> - <input type="text"/> - <input type="text"/>	* Local Student ID:	<input type="text"/>	* Grade:	<input type="text"/>
* District:	<input type="text"/>	* School Year:	<input type="text"/>	State ID:	<input type="text"/>		

\* Required Fields

A red asterisk indicates which fields are required.

**Figure 1: Enter Individual Student (File Format 1.0)**

**Enter Individual Student** 

Current Login: superuser Location: 423460504-Arcadia University [State ID Home](#)

Student Data Entry					
* First Name:	<input type="text"/>	Middle Name:	<input type="text"/>	* Last Name:	<input type="text"/>
Suffix:	<input type="text"/>	* Gender:	<input type="text" value="v"/>	* Date Of Birth:	<input type="text" value="v"/> / <input type="text" value="v"/> / <input type="text" value="v"/>
* Sch. Code:	<input type="text"/>	Res District:	<input type="text"/>	SSN:	<input type="text" value="v"/> - <input type="text" value="v"/> - <input type="text" value="v"/>
* Grade:	<input type="text" value="v"/>	* District:	<input type="text"/>	* School Year:	<input type="text"/>
* Source System:	<input type="text" value="Default"/>	Alternate ID:	<input type="text"/>	Alternate Source:	<input type="text" value="v"/>
Birth City:	<input type="text"/>	Birth Country:	<input type="text"/>	Guardian Name:	<input type="text"/>
Exit Date:	<input type="text"/>			Enrollment Date:	<input type="text"/>

\* Required Fields

**Figure 2: Enter Individual Student (File Format 2.0 with Customer Defined Fields)**

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



**NOTE:** Due to the importance of SSN in matching, users should only provide valid SSNs for student records. If the SSN is unknown, the SSN should remain null.



**NOTE:** Some implementations may not include the **State ID** field on the above page. In addition, the **State ID** field is to be used only for IDs that have been previously assigned by the eUID system.

## Validating and Fixing Data

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 page as shown below.

**Enter Individual Student**

Current Login: 0000supr Location: 009-Allentown School District State ID Home

---

**System Message**

The student information has not been updated. Validation errors.

---

**Student Data Entry**

* First Name: <input type="text" value="George"/>	Middle Name: <input type="text"/>	* Last Name: <input type="text" value="Polton"/>	Suffix: <input type="text"/>
* Gender: <input type="text" value="M"/> <span style="color: red;">* Invalid:Required</span>	* Date Of Birth: <input type="text" value="12"/> / <input type="text" value="26"/> / <input type="text" value="1980"/> <span style="color: red;">* Invalid:Invalid Date</span>	* Ethnicity: <input type="text" value="Black (Non-Hispanic)"/>	* Sch. Code: <input type="text" value="0102"/>
* Res District: <input type="text" value="003"/>	SSN: <input type="text"/>	* Local Student ID: <input type="text" value="124578"/>	* Grade: <input type="text" value="Second Grade"/>
* District: <input type="text" value="0009"/> <span style="color: red;">* Invalid</span>	* School Year: <input type="text" value="2008"/>	State ID: <input type="text"/>	

\* Required Fields

User should correct the information on the form and then click the **ASSIGN STATE ID** button again. The system will not go to the next step of assigning the IDs until all fields successfully pass validation.

## Assigning IDS

The eUID system takes the “Enter Individual Student” data submission through all the stages of the ID Assignment Process, similar to the processing of a Student Batch File. As such, the system will review for a match, near match or no match during the ID Assignment process.

## Resolving Near Matches

If the submission encounters any Near Matches during the ID Assignment process, the application will display the status as “Near Matches / Duplicates found” and will display a **RESOLVE NEAR MATCHES** button in the Next Action column. For more information on resolving near matches, please review the **Upload Batch File - Resolving Near Matches** section above.

Assign ID				
Current Login: 0000supr Location: 009-Allentown School District				State ID Home
Upload Date	Batch Info	Status	Number of Records	Next Action
01/21/2008	808	Near Matches / Duplicates found Click <a href="#">here</a> to download records.	1	Resolve Near Matches



**NOTE:** The system implements the same set of procedures, business rules, and processing for a record entered online as with an upload batch record. The application creates a virtual batch for every record entered online through the Enter Individual Student feature. That batch, however, only contains the one record that was entered by the user.

## Downloading IDS

Upon completion of the steps described above, the system will display the status of the batch as “ID Assigned”, the number of records, a download link and an **ENTER ANOTHER STUDENT** button.

Assign ID				
Current Login: 0000supr Location: 009-Allentown School District				State ID Home
Upload Date	Batch Info	Status	Number of Records	Next Action
01/21/2008	809	ID Assigned. New ID Created for the Student is 422283341. Click <a href="#">here</a> to download records.	1	Enter Another Student

Users can obtain the ID that was assigned from the Status column or can download the same as in the file by clicking the **here** link in that Status column.

## Batch Information

Users can click the button in the **BATCH INFO** column to display information about the online batch file created for the entered student. A pop-up window displays similar to the following:

**Batch Information : Batch 43**

Batch Statistics
Processing Info
Download Info
General Info

**ID Assignment Complete**

**New ID Assigned - No Matching Record Found**      1

Close Window

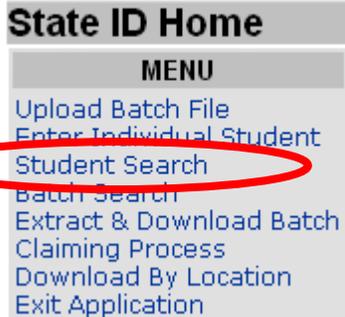
This message indicates that there is only one record in the batch and that the **State ID** was created without encountering any Near Matches or duplicates.

---

## STUDENT SEARCH

---

Users can search for students online by clicking the **Student Search** link in the *Menu*:



This feature allows users to:

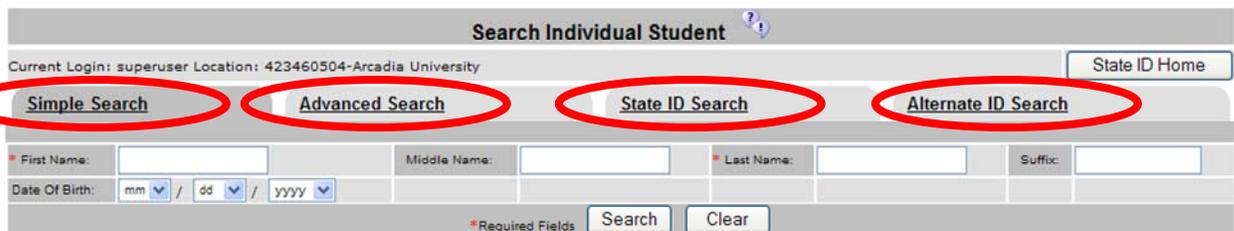
- Search for students online.
- View student information.
- Edit student information.
- Add a student note.
- View student notes.

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

### Searching for a Student

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

1. Click on the **Student Search** link on the *Menu*.
2. Click on the appropriate search tab. This module has three types of searches available: Simple Search, Advanced Search, State ID Search, and Alternate ID Search.



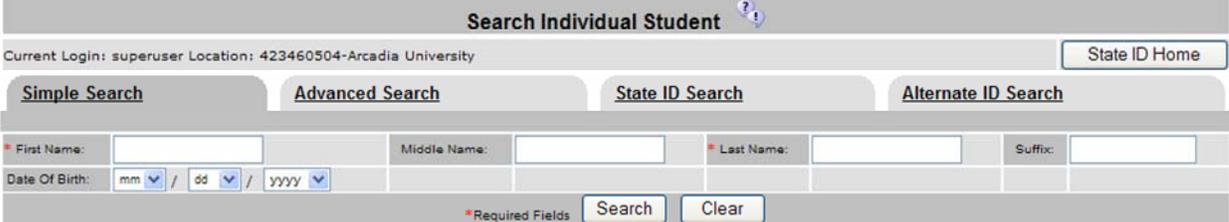
The image shows the "Search Individual Student" interface. At the top, it says "Current Login: superuser Location: 423460504-Arcadia University" and "State ID Home". Below this are four search tabs: Simple Search, Advanced Search, State ID Search, and Alternate ID Search, all of which are circled in red. Below the tabs are input fields for First Name, Middle Name, Last Name, and Suffix, and a Date of Birth field with dropdown menus for month, day, and year. At the bottom, there are "Search" and "Clear" buttons, and a note that asterisks indicate required fields.



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

## Simple Search

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



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

## Advanced Search

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



Figure 3: Advanced Search (File Format 2.0 with Customer Defined Fields)

Customer Defined Fields are also displayed.

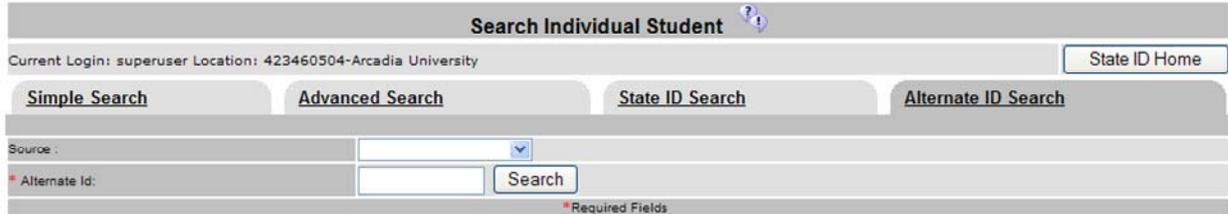
## State ID Search

*State ID Search* allows users to find students using a State ID.



## Alternate ID Search

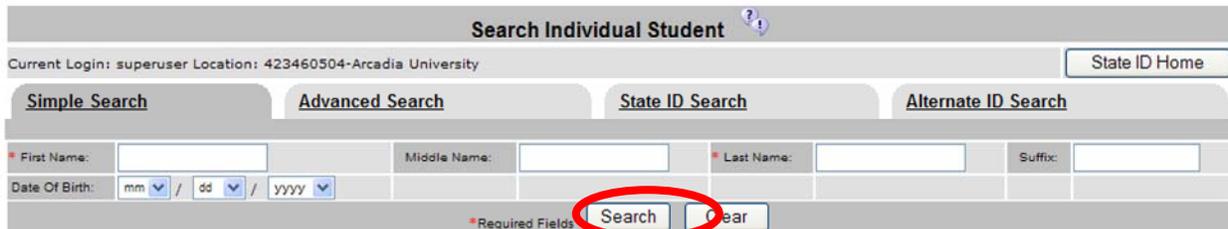
The *Alternate ID Search* allows users to find students by Alternate ID or Local ID.



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

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

4. Click the **SEARCH** button.




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

## Viewing the Search Results

After the Search button is clicked, the system will display the results of the search. This can include a "No Records Found" status or a list of matching results. If no matches are found for the search criteria, the system displays a message under the search form. When this occurs, users should adjust the search criteria if necessary.



When one or more students are found, the application displays the matching records, along with the match probability. The closest match displays as the first result in the list.

Search without a date of birth:

**Search Individual Student**

Current Login: superuser Location: 123460001-Pennsylvania Virtual CS State ID Home

**Simple Search**    **Advanced Search**    **State ID Search**    **Alternate ID Search**

\* First Name:     Middle Name:     \* Last Name:     Suffix:

Date Of Birth: mm / dd / yyyy

\* Required Fields    Search    Clear    Enter New Student

---

**Search Results**

Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	SSN	Match Probability
<a href="#">Koren</a>	<a href="#">Iris</a>			11/07/1992	FEMALE	Not Present	80

Search with date of birth:

**Search Individual Student**

Current Login: superuser Location: 123460001-Pennsylvania Virtual CS State ID Home

**Simple Search**    **Advanced Search**    **State ID Search**    **Alternate ID Search**

\* First Name:     Middle Name:     \* Last Name:     Suffix:

Date Of Birth: 11 / 07 / 1997

\* Required Fields    Search    Clear    Enter New Student

---

**Search Results**

Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	SSN	Match Probability
<a href="#">Koren</a>	<a href="#">Iris</a>			11/07/1992	FEMALE	Not Present	92 [NEAR MATCH]

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

**Search Individual Student**

Current Login: superuser Location: 423460504-Arcadia University State ID Home

**Simple Search**    **Advanced Search**    **State ID Search**    **Alternate ID Search**

\* First Name:     Middle Name:     \* Last Name:     Suffix:

Date Of Birth: mm / dd / yyyy

\* Required Fields    Search    Clear    **Enter New Student**

---

**No records found.**



**NOTE:** There is an application-level setting that allows clients to change the type of search users can perform. One type is a Matching Engine Search that uses the eUID

system matching engine to find students. The other type is a SQL Engine Search that uses basic database queries to find students. With the latter, this module will perform right truncation searches. For example, searching for the student “Smith” will also return the student “Smithson.” In addition, no Match Probability will display with SQL Engine Searches.

To view more detailed information about the student, users should click the hyperlink in the “Last Name” or the “First Name” column. Upon clicking the hyperlinks, the **Search Individual Student** information page will be displayed. The **Search Individual Student information** page will display the student’s current information in the top section and the history information in the bottom section. Users can view additional information, edit the student, return to the search results or return to the home page. Users can view additional information about the record by clicking the link in the “Update Ref #” field or the “History Date” column.

**Search Individual Student** 

Current Login: superuser Location: 423460504-Arcadia University State ID Home

---

**Student Information: [State ID : 433-2690168] Created: 12/11/2009** [Add Note](#)

First Name:	SABRA	Middle Name:	L	Last Name:	FARMER	Alt Last Name:	
Suffix:		School:	9999 Arcadia Main Campus	Gender:	FEMALE	Local ID:	106632359
Grade:	005	Dist:	423460504 Arcadia University	Date Of Birth:	08/14/1990	Ethnicity:	Black (Non-Hispanic)
SSN:	Not Present	Sch Yr:	2010	Res Dist:	423460504 Arcadia University	Last Updated:	12/17/2009
Update Ref #:	<a href="#">8111391</a>	Last Batch #:	157592	Source System:	Default	Alternate ID:	
Alternate Source:							

**History Information**

History Date	Last Name	First Name	Middle Name	Suffix	Gender	Date Of Birth	Race/Ethnicity	SSN	District	School
<a href="#">12/11/2009</a>	FARMER	SABRA	L		FEMALE	08/14/1990	Black (Non-Hispanic)	Not Present	423460504	9999
<a href="#">12/11/2009</a>	FARMER	SABRA	L		FEMALE	08/14/1990	Black (Non-Hispanic)	Not Present	423460504	0000

**Screenshot from History Date link:**

**History Date: 12/11/2009 Created: 12/11/2009**

First Name:	SABRA	Middle Name:	L	Last Name:	FARMER	Alt Last Name:	
Suffix:		School:	9999 Arcadia Main Campus	Gender:	FEMALE	Local ID:	106632359
Grade:	005	Dist:	423460504 Arcadia University	Date Of Birth:	08/14/1990	Ethnicity:	Black (Non-Hispanic)
Sch Yr:	2010	Res Dist:	423460504 Arcadia University	Last Updated:	12/11/2009	Update Ref #:	8110828
Last Batch #:	157482	Source System:	Default				

**Screenshot from Update Ref #: link:**

Search Input Record							
Student Information [ Reference No : 8111391 ]							
First Name:	SABRA	Middle Name:	L	Last Name:	FARMER	Alt Last Name:	
Suffix:		School:	423480504-9999 Arcadia Main Campus	Res. Dist:	423480504	Local ID:	106632359
Grade:	005	Gender:	FEMALE	Date Of Birth:	08/14/1990	Ethnicity:	Black (Non-Hispanic)
Sch Yr:	2010	Input Type:	Batch	Batch Number:	157592	Created By:	superuser
Created:	12/17/2009	Last Updated:	12/17/2009	State ID:	4332890168	Status:	STUDENT FOUND AND HISTORY CREATED DURING ASSIGN ID STAGE
Processed:	12/17/2009	Source System:	Default				
Comments:							



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

## Editing Student

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

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

### AND

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

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

1. Perform a search as described above.
2. Click the **EDIT STUDENT** button on the Search Individual Student results page.



**Search Individual Student** State ID Home

Current Login: superuser Location: 423460504-Arcadia University

**Student Information: [State ID : 433-2690168] Created: 12/11/2009** [Add Note](#)

First Name:	SABRA	Middle Name:	L	Last Name:	FARMER	Alt Last Name:	
Suffix:		School:	9999 Arcadia Main Campus	Gender:	FEMALE	Local ID:	106632359
Grade:	005	Dist:	423460504 Arcadia University	Date Of Birth:	08/14/1990	Ethnicity:	Black (Non-Hispanic)
SSN:	Not Present	Sch Yr:	2010	Res Dist:	423460504 Arcadia University	Last Updated:	12/17/2009
Update Ref #:	<a href="#">8111391</a>	Last Batch #:	157592	Source System:	Default	Alternate ID:	
Alternate Source:							

History Information										
History Date	Last Name	First Name	Middle Name	Suffix	Gender	Date Of Birth	Race/Ethnicity	SSN	District	School
<a href="#">12/11/2009</a>	FARMER	SABRA	L		FEMALE	08/14/1990	Black (Non-Hispanic)	Not Present	423460504	9999
<a href="#">12/11/2009</a>	FARMER	SABRA	L		FEMALE	08/14/1990	Black (Non-Hispanic)	Not Present	423460504	0000

**Figure 4: Search Results Student Information (File Format 1.0)**

**Search Individual Student** ?

Current Login: superuser Location: 423460504-Arcadia University State ID Home

**Student Information: [State ID : 433-2690168] Created: 12/11/2009** [Add Note](#)

First Name:	SABRA	Middle Name:	L	Last Name:	FARMER	Local ID:	106632359
Suffix:		School:	9999 Arcadia Main Campus	Gender:	FEMALE	Ethnicity:	Black (Non-Hispanic)
Grade:	005	Dist:	423460504 Arcadia University	Date Of Birth:	08/14/1990	Last Updated:	12/17/2009
SSN:	Not Present	Sch Yr:	2010	Res Dist:	423460504 Arcadia University		
Update Ref #:	<a href="#">8111391</a>	Last Batch #:	157592				

**History Information**

History Date	Last Name	First Name	Middle Name	Suffix	Gender	Date Of Birth	Race/Ethnicity	SSN	District	School
<a href="#">12/11/2009</a>	FARMER	SABRA	L		FEMALE	08/14/1990	Black (Non-Hispanic)	Not Present	423460504	9999
<a href="#">12/11/2009</a>	FARMER	SABRA	L		FEMALE	08/14/1990	Black (Non-Hispanic)	Not Present	423460504	0000

**Figure 5: Search Results Student Information (File Format 2.0 with Customer Defined Fields)**



**NOTE:** The **Edit Student** button will always display on the above page but may not always be enabled.

- Review the Edit Student screen. This screen displays the student record and allows the user to make corrections/additions to the information.

**Edit Student** ?

Current Login: superuser Location: 423460504-Arcadia University State ID Home

**Student Information**

* First Name:	<input type="text" value="SABRA"/>	Middle Name:	<input type="text" value="L"/>	* Last Name:	<input type="text" value="FARMER"/>		
Suffix:	<input type="text"/>	* Gender:	<input type="text" value="FEMALE"/>	* Date Of Birth:	<input type="text" value="08"/> / <input type="text" value="14"/> / <input type="text" value="1990"/>	Ethnicity:	<input type="text" value="Black (Non-Hispanic)"/>
* Sch. Code:	<input type="text" value="9999"/>	Res District:	<input type="text" value="423460504"/>	SSN:	<input type="text"/>	Local ID:	<input type="text" value="106632359"/>
* Grade:	<input type="text" value="Grade 5"/>	* District:	<input type="text" value="423460504"/>	* School Year:	<input type="text" value="2010"/>	State ID :	<input type="text" value="4332690168"/>

\* Required Fields

**Figure 6: Edit Student (File Format 1.0)**

**Edit Student** ?

Current Login: superuser Location: 423460504-Arcadia University State ID Home

**Student Information**

* First Name:	<input type="text" value="SABRA"/>	Middle Name:	<input type="text" value="L"/>	* Last Name:	<input type="text" value="FARMER"/>	Alt Last Name:	<input type="text"/>
Suffix:	<input type="text"/>	* Gender:	<input type="text" value="FEMALE"/>	* Date Of Birth:	<input type="text" value="08"/> / <input type="text" value="14"/> / <input type="text" value="1990"/>	Ethnicity:	<input type="text" value="Black (Non-Hispanic)"/>
* Sch. Code:	<input type="text" value="9999"/>	Res District:	<input type="text" value="423460504"/>	SSN:	<input type="text"/>	Local ID:	<input type="text" value="106632359"/>
* Grade:	<input type="text" value="Grade 5"/>	* District:	<input type="text" value="423460504"/>	* School Year:	<input type="text" value="2010"/>	State ID :	<input type="text" value="4332690168"/>
* Source System:	<input type="text" value="Default"/>	Alternate ID:	<input type="text"/>	Alternate Source:	<input type="text"/>		
Birth City:	<input type="text"/>	Birth Country:	<input type="text"/>	Guardian Name:	<input type="text"/>	Enrollment Date:	<input type="text"/>
Exit Date:	<input type="text"/>						

\* Required Fields

**Figure 7: Edit Student (File Format 2.0 with Customer Defined Fields)**

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



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

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

**Edit Student** ? !

Current Login: superuser Location: 423460504-Arcadia University State ID Home

**System Message**

The student information has not been updated. Validation errors.

---

**Student Information**

* First Name: SABRA	Middle Name: L	* Last Name: FARMER	Alt Last Name:
Suffix:	* Gender: <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">Invalid: Required</span>	Day Of Birth: 08 / 14 / 1990	Ethnicity: Black (Non-Hispanic)
* Sch. Code: 9999	Res District: 423460504	SSN:	Local ID: 106632359
* Grade: Grade 5	* District: 423460504	* School Year: 2010	State ID : 433-2690168
* Source System: Default	Alternate ID:	Alternate Source:	
Birth City:	Birth Country:	Guardian Name:	Enrollment Date:
Exit Date:			

\* Required Fields Update Student Record Back To Search Results

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

**Edit Student** 

Current Login: superuser Location: 423460504-Arcadia University State ID Home

---

**System Message**

The student record has been updated. Batch: 157594. You can download this information using Extract & Download.

---

**Student Information**

* First Name: SABRA	Middle Name: LAUREN	* Last Name: FARMER	Alt Last Name:
Suffix:	* Gender: FEMALE	* Date Of Birth: 08 / 14 / 1990	Ethnicity: Black (Non-Hispanic)
* Sch. Code: 9999	Res District: 423460504	SSN:	Local ID: 106632359
* Grade: Grade 5	* District: 423460504	* School Year: 2010	State ID : 4332690168
* Source System: Default	Alternate ID:	Alternate Source:	
Birth City:	Birth Country:	Guardian Name:	Enrollment Date:
Exit Date:			

Update Student Record
Back To Search Results

\* Required Fields

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



**NOTE:** The number for the batch that the system creates will display on the screen above.

## Adding Student Notes

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

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



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

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

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

**Search Individual Student** State ID Home

Current Login: superuser Location: 423460504-Arcadia University

---

Student Information: [State ID : 433-2690168] Created: 12/11/2009 [Add Note](#)

First Name:	SABRA	Middle Name:	L	Last Name:	FARMER	Local ID:	106832359
Suffix:		School:	9999 Arcadia Main Campus	Gender:	FEMALE	Local ID:	106832359
Grade:	005	Dist:	423460504 Arcadia University	Date Of Birth:	08/14/1990	Ethnicity:	Black (Non-Hispanic)
SSN:	Not Present	Sch Yr:	2010	Res Dist:	423460504 Arcadia University	Last Updated:	12/17/2009
Update Ref #:	<a href="#">8111391</a>	Last Batch #:	157592				

---

History Information

History Date	Last Name	First Name	Middle Name	Suffix	Gender	Date Of Birth	Race/Ethnicity	SSN	District	School
<a href="#">12/11/2009</a>	FARMER	SABRA	L		FEMALE	08/14/1990	Black (Non-Hispanic)	Not Present	423460504	9999
<a href="#">12/11/2009</a>	FARMER	SABRA	L		FEMALE	08/14/1990	Black (Non-Hispanic)	Not Present	423460504	0000

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

**Add Student Note** State ID Home

Current Login: 0000supr Location: 0009-Allentown School District

---

General Note for State ID: 031-999-7474

\* Note Text:

6. Enter Note Text.
7. Click the **SAVE** button.
8. A confirmation page will be displayed allowing the user to view the note that was added.



9. Click the **BACK** button to return to the Claim Details or the **STATE ID HOME** button to return to the system home page.

Student notes can be added throughout the application where the “Add Note” link exists.

## Viewing Student Notes

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

1. Click the **Student Search** link on the *Menu*.
2. Search for a student as described above.
3. Click the hyperlinked Last Name or First Name to view the search details. Upon clicking the hyperlinks, the **Student Search** information page will be displayed.
4. If notes have been added, a magnifying glass icon will be displayed to the right of the Student Information and ID in the top row of the details. 

**Search Individual Student** 

Current Login: superuser Location: 423460504-Arcadia University State ID Home

---

Student Information: [State ID : 433-2690168] Created: 12/11/2009  [Add Note](#)

First Name:	SABRA	Middle Name:	LAUREN	Last Name:	FARMER	Alt Last Name:	
Suffix:		School:	9999 Arcadia Main Campus	Gender:	FEMALE	Local ID:	106632359
Grade:	005	Dist:	423460504 Arcadia University	Date Of Birth:	08/14/1990	Ethnicity:	Black (Non-Hispanic)
SSN:	Not Present	Sch Yr:	2010	Res Dist:	423460504 Arcadia University	Last Updated:	12/17/2009
Update Ref #:	<a href="#">8111489</a>	Last Batch #:	157594	Source System:	Default	Alternate ID:	
Alternate Source:							

Edit Student Back To Search Results

**History Information**

History Date	Last Name	First Name	Middle Name	Suffix	Gender	Date Of Birth	Race/Ethnicity	SSN	District	School
<a href="#">12/11/2009</a>	FARMER	SABRA	L		FEMALE	08/14/1990	Black (Non-Hispanic)	Not Present	423460504	9999
<a href="#">12/11/2009</a>	FARMER	SABRA	L		FEMALE	08/14/1990	Black (Non-Hispanic)	Not Present	423460504	0000
<a href="#">12/17/2009</a>	FARMER	SABRA	L		FEMALE	08/14/1990	Black (Non-Hispanic)	Not Present	423460504	9999

5. Click the magnifying glass icon to view the notes.
6. A new window will open displaying the available notes for the student. The system provides information on the user ID, creation date, the text of the note and the note type.

Admin Notes		General Notes	
<b>SABRA FARMER [State ID : 433-2690168]</b>			
<b>Creation User ID</b>	<b>Creation Date</b>	<b>Note Text</b>	<b>Note Type</b>
superuser	12/17/2009	This student transferred from district ABC.	General

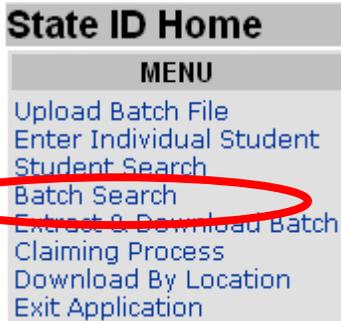


**NOTE:** The system contains Administrator and General notes. Administrator notes are visible only to Administrators while General notes are viewable by anyone with authorization to view general notes.



## BATCH SEARCH

Users can search for students with a batch file by clicking the **Batch Search** link in the *Menu*:



This feature allows users to:

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

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

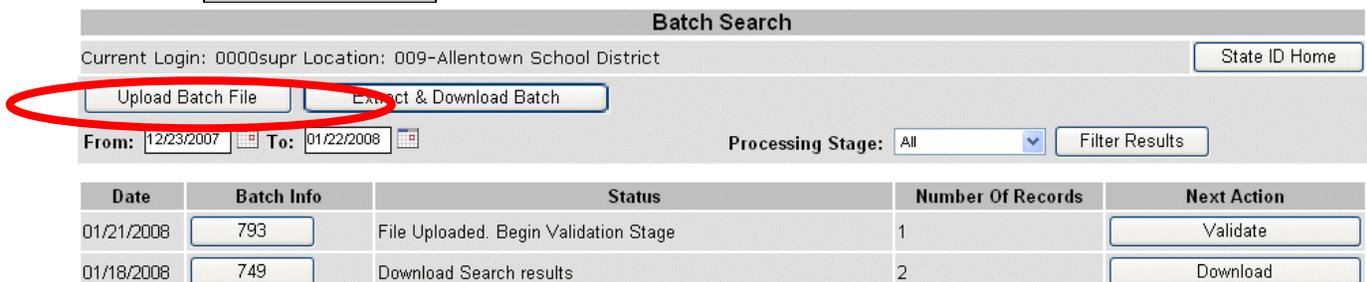


**NOTE:** In this module, the application will search against the current information for students who have been assigned an ID.

### Searching for Students with a Batch File

The **Batch Search** feature requires that a file containing students is uploaded into the system. The format/structure of the search file is exactly the same as **the Student Batch File** format, but not all fields are required. Please refer to the Batch Search File Format in Appendix D. To search for students using a batch files, users should perform the following steps:

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



**Batch Search**

Current Login: 0000supr Location: 009-Allentown School District State ID Home

**Upload Batch File** **Extract & Download Batch**

From: 12/23/2007 To: 01/22/2008 Processing Stage: All Filter Results

Date	Batch Info	Status	Number Of Records	Next Action
01/21/2008	793	File Uploaded. Begin Validation Stage	1	Validate
01/18/2008	749	Download Search results	2	Download

3. Click on the appropriate upload tab: *Basic or Advanced*. This functions the same way as described in the **Uploading a Student Batch File** section above.

**Upload Batch File**

Current Login: 0000supr Location: 009-Allentown School District State ID Home

**Basic** **Advanced**

File to Upload:

4. Browse for the file and complete the upload form as necessary.
5. Click the **UPLOAD** button.
  - a. The system will analyze the file, similar to the process described in the **File Upload** section above and display any file errors.
  - b. If a file error is found during the processing, the user should click the **UPLOAD NEW FILE** button to submit a new file.



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



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

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



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

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

**Batch Search**

Current Login: 0000supr Location: 0009-Allentown School District State ID Home

From: 12/22/2007 To: 01/22/2008 Processing Stage: All

Date	Batch Info	Status	Number Of Records	Next Action
01/22/2008	241	File Uploaded. Begin Validation Stage	1	<input type="button" value="validate"/>

- a. If any data errors are found during validation, the records containing the data errors are auto-canceled. Those records will not be included in the rest of the search process.
  - b. The records in the batch will also auto-cancel if they include the ID.
8. The system will return to the Batch Search screen displaying the status of the process.
  9. Click the **SEARCH** button to perform the search. If the **SEARCH** button is not visible, click the **FILTER RESULTS** button to refresh the page.
  10. The system will return to the Batch Search screen displaying the status of the process, along with the **BATCH INFORMATION** button. The application will find one of the following for each record in a batch:
    - a. No matching students - The **State ID** column will be blank for these types of records in the downloaded file.
    - b. A single matching student - The **State ID** column will contain the State ID of the matching student for these types of records in the downloaded file.
    - c. Multiple matching students – The record will be auto-canceled and will not be listed in the downloaded file.
    - d. One or more near matching students – The record will be auto-canceled and will not be listed in the downloaded file.



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

11. Click the **DOWNLOAD** button to generate the file for download. If the **DOWNLOAD** button is not visible, click the **FILTER RESULTS** button to refresh the page.
12. Download the search results file by clicking the **here** link in the Status column. Doing so will open a File Download dialogue box that enables the user to either open the file or save it to the local computer.
13. The format of the downloaded file will be exactly the same as the Student Batch File and each student record will include the State ID that was assigned to that student.

Download ID				
Current Login: 0000supr Location: 0009-Allentown School District				<a href="#">State ID Home</a>
Upload Date	Batch Info	Status	Record Count	Next Action
01/08/2008	132	File Extract Complete. Click <a href="#">here</a> to download the file.	1	<a href="#">Return To Search Home</a>

## Batch Information

Users can click **BATCH INFO** to display the status of the batch file and its records. A pop-up window similar to the following displays:

Batch Information : Batch 251	
<b>Batch Statistics</b>	<b>Processing Info</b>
<b>Download Info</b>	<b>General Info</b>
Search	
Ready to Search IDs	1
Canceled During Data Validation Stage - Search	1

This section indicates the current status of all records in the batch. In this example, one record passed validation and one record was canceled because it contained at least one data error.

## Viewing Previous Batch Searches

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

Batch Search				
Current Login: 0000supr Location: 0009-Allentown School District				State ID Home
Upload Batch File		Extract & Download Batch		
From:	01/22/2007	To:	01/22/2008	Processing Stage: All Filter Results
Date	Batch Info	Status	Number Of Records	Next Action
01/22/2008	241	File Uploaded. Begin Validation Stage	1	Validate

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



## Extracting & Downloading Batch Search Files

The **Extract & Download** component can be accessed from within the **Batch Search** component. The **Extract & Download** component is detailed further in the **Extract & Download** section below.

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

**Batch Search**

Current Login: 0000supr Location: 0009-Allentown School District State ID Home

From:  To: 
 Processing Stage:

Date	Batch Info	Status	Number Of Records	Next Action
01/22/2008	<input type="text" value="241"/>	File Uploaded. Begin Validation Stage	1	<input type="button" value="Validate"/>

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

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

**Extract & Download Batch**

Current Login: 0000supr Location: 0009-Allentown School District State ID Home

Submission Type: 
 Extract Type: 
 Sort:

From:  To:

Upload Date	Batch Info	Status	Record Count	Next Action
01/22/2008	<input type="text" value="247"/>	IDs Found - Search	1	<input type="button" value="Extract Records"/> <input type="button" value="Add To Download Cart"/>
01/22/2008	<input type="text" value="246"/>	IDs Found - Search	1	<input type="button" value="Extract Records"/> <input type="button" value="Add To Download Cart"/>
01/08/2008	<input type="text" value="132"/>	IDs Found - Search	1	<input type="button" value="Extract Records"/> <input type="button" value="Add To Download Cart"/>

Displaying 1 to 3 of 3

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

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

**Extract & Download Batch**

Current Login: 0000supr Location: 0009-Allentown School District State ID Home

Upload Date	Batch Info	Status	Record Count	Next Action
01/22/2008	<input type="text" value="247"/>	File Extract Complete. Click <a href="#">here</a> to download the file.	1	<input type="button" value="Extract Another Batch"/>



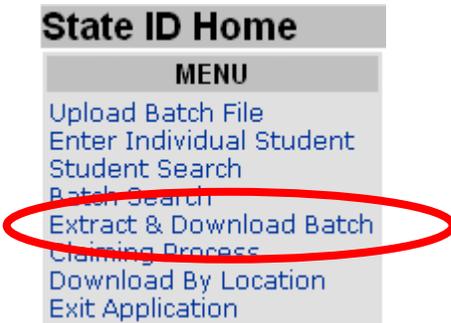
For more information on using the Download Cart please refer to the **Extract & Download Batch** section of this document.

---

## EXTRACT & DOWNLOAD BATCH

---

Users can download files related to the eUID system by clicking the **Extract & Download Batch** link in the *Menu*:



This module allows users to:

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

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



**NOTE:** Some implementations may disable this feature for certain or all users. In such an instance, the **Extract & Download Batch** link will not appear on the Menu.

### Filtering the List of Downloads

All downloads in this module pertain to the ID Assignment Process. Below is a list of the six types of downloads available:

- *IDs Assigned*
- *Errors to Fix*
- *Near Matches*
- *Canceled*
- *Rejected*
- *Fixed Records*

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

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

**Extract & Download Batch**

Current Login: 0000supr Location: 0009-Allentown School District State ID Home

Submission Type:  Extract Type:  Sort:  **Filter Results**

From:  To:

View Download Cart

Upload Date	Batch Info	Status	Record Count	Next Action
01/14/2008	<input type="text" value="218"/>	ID Assigned.	1	<input type="button" value="Extract Records"/> <input type="button" value="Add To Download Cart"/>
01/14/2008	<input type="text" value="217"/>	ID Assigned.	1	<input type="button" value="Extract Records"/> <input type="button" value="Add To Download Cart"/>
01/14/2008	<input type="text" value="216"/>	ID Assigned.	1	<input type="button" value="Extract Records"/> <input type="button" value="Add To Download Cart"/>

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

**Batch Information : Batch 254**

---

**Ready to Fix Data Errors**

Ready to Fix Data Errors 6

## Downloading a Single File

The system allows users to download a single file from the Extract & Downloads component. To download a single file, users should perform the following steps:

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

**Extract & Download Batch**

Current Login: 0000supr Location: 0009-Allentown School District State ID Home

Submission Type: All Extract Type: IDs Assigned Sort: Upload Date Desc Filter Results

From: 12/22/2007 To: 01/22/2008

View Download Cart

Upload Date	Batch Info	Status	Record Count	Next Action
01/14/2008	218	ID Assigned.	1	Extract Records <span style="float: right;">Add To Download Cart</span>
01/14/2008	217	ID Assigned.	1	Extract Records <span style="float: right;">Add To Download Cart</span>
01/14/2008	216	ID Assigned.	1	Extract Records <span style="float: right;">Add To Download Cart</span>

4. Download the **Extract & Download** file by clicking the **here** link in the Status column. Doing so will open a **File Download** dialogue box that enables users to either open the file or save it to your local computer.

**Extract & Download Batch**

Current Login: 0000supr Location: 0009-Allentown School District State ID Home

Upload Date	Batch Info	Status	Record Count	Next Action
06/13/2006	42	File Extract Complete. Click <a href="#">here</a> to download the file.	11	Extract Another Batch

Displays the link to the newly created student file ready for download.

Represents the total number of detail records in this download.

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



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

## Downloading a Multiple Files

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

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

**Extract & Download Batch**

Current Login: 0000supr Location: 0009-Allentown School District State ID Home

Submission Type: All Extract Type: IDs Assigned Sort: Upload Date Desc Filter Results

From: 12/22/2007 To: 01/22/2008

[View Download Cart](#)

Upload Date	Batch Info	Status	Record Count	Next Action
01/14/2008	218	ID Assigned.	1	Extract Records <a href="#">Add To Download Cart</a>
01/14/2008	217	ID Assigned.	1	Extract Records <a href="#">Add To Download Cart</a>
01/14/2008	216	ID Assigned.	1	Extract Records <a href="#">Add To Download Cart</a>

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

**Download Cart**

Current Login: 0000supr Location: 0009-Allentown School District State ID Home

**Download Cart - Errors to Fix Extract Type**

	Upload Date	Batch Number	Record Count
<input type="checkbox"/>	01/18/2008	234	8
<input type="checkbox"/>	01/21/2008	239	1

[Download Cart](#) [Download With Options](#) [Back To Extract & Download](#) [Remove Selected](#) [Clear](#)

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

- To continue adding batches to the cart, click the **BACK TO EXTRACT & DOWNLOAD** button.
- Repeat steps 1 through 4 as necessary until all files are added to the cart.
- The Download Cart will not allow users to download batches together in one file if the File Format versions are different between the batches.

**Download Cart**

Current Login: 0000supr Location: 998-NC Juvenile Justice Uniq-ID

**Download Cart - IDs Assigned Extract Type**

	Upload Date	Batch Number	Record Count
<input type="checkbox"/>	03/31/2009	28	2
<input type="checkbox"/>	04/09/2009	44	26

[Download Cart](#) [Download With Options](#) [Back To Extract & Download](#) [Remove Selected](#) [Clear Cart](#)

One or more of batches selected were created in different versions

**Download Cart**

Current Login: 0000supr Location: 0009-Allentown School District State ID Home

Download Cart - Errors to Fix Extract Type			
	Upload Date	Batch Number	Record Count
<input type="checkbox"/>	01/18/2008	234	8
<input type="checkbox"/>	01/21/2008	239	1

7. If there are no errors with the files placed in the Download Cart, the system will allow the batches to be downloaded. All of the batches in the Download Cart will be combined into one file. Files using different File Formats cannot be combined.
8. Click the **DOWNLOAD CART** button to generate the download file.
9. Download the **Download Cart** file by clicking the **here** link in the Status column. Doing so will open a **File Download** dialogue box that enables users to either open the file or save it to your local computer.

**Extract & Download Batch**

Current Login: 0000supr Location: 0009-Allentown School District State ID Home

Upload Date	Batch Info	Status	Record Count	Next Action
01/18/2008	234,239	File Extract Complete Click <a href="#">here</a> to download the file.	9	<input type="button" value="Extract Another Batch"/>

## Downloading with Options

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

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

Download Cart			
Current Login: 0000supr Location: 0009-Allentown School District			State ID Home
Download Cart - Errors to Fix Extract Type			
	Upload Date	Batch Number	Record Count
<input type="checkbox"/>	01/18/2008	234	8
<input type="checkbox"/>	01/21/2008	239	1
<input type="button" value="Download Cart"/> <input type="button" value="Download With Options"/> <input type="button" value="Back To Extract &amp; Download"/> <input type="button" value="Remove Selected"/> <input type="button" value="Clear"/>			

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

Download Options	
Current Login: 0000supr Location: 998-NC Juvenile Justice	
Uniq-ID	
Template:	eScholar Uniq-ID® v2.0
Field Delimiter:	TAB
Field Qualifier:	
Date Format:	mm/dd/yyyy
Include Header/Footer:	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="button" value="Download"/> <input type="button" value="Back"/>	

- a. *Template:* eScholar Uniq-ID® v1.0 or eScholar Uniq-ID® v2.0
- b. *Field Delimiter:* The options for this selection are Tab or Comma.
- c. *Field Qualifier:* The options for this selection are “ and ‘.
- d. *Date Format:* The options for this selection are:
  - mm/dd/yyyy
  - mm/d/yyyy
  - ISO YYYY-MM-DD
  - m/d/yyyy
  - m/dd/yyyy



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

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

4. Select the download options.
5. Click the **DOWNLOAD** button.

## Removing Batches from the Download Cart

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

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

Download Cart - Errors to Fix Extract Type			
	Upload Date	Batch Number	Record Count
<input checked="" type="checkbox"/>	01/18/2008	234	8
<input checked="" type="checkbox"/>	01/21/2008	239	1

## Viewing the Download Cart

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

Extract & Download Batch					
Current Login: 0000supr Location: 0009-Allentown School District					<input type="button" value="State ID Home"/>
Submission Type:	<input type="button" value="All"/>	Extract Type:	<input type="button" value="IDs Assigned"/>	Sort:	<input type="button" value="Upload Date Desc"/>
From:	<input type="text" value="12/22/2007"/>	To:	<input type="text" value="01/22/2008"/>	<input type="button" value="Filter Results"/>	
					<input type="button" value="View Download Cart"/>
Upload Date	Batch Info	Status	Record Count	Next Action	
01/14/2008	<input type="text" value="218"/>	ID Assigned.	1	<input type="button" value="Extract Records"/>	<input type="button" value="Add To Download Cart"/>
01/14/2008	<input type="text" value="217"/>	ID Assigned.	1	<input type="button" value="Extract Records"/>	<input type="button" value="Add To Download Cart"/>
01/14/2008	<input type="text" value="216"/>	ID Assigned.	1	<input type="button" value="Extract Records"/>	<input type="button" value="Add To Download Cart"/>

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

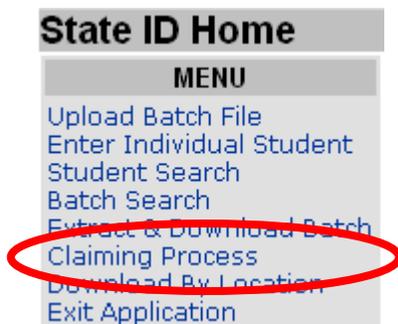
Download Cart - Errors to Fix Extract Type			
	Upload Date	Batch Number	Record Count
<input checked="" type="checkbox"/>	01/18/2008	234	8
<input checked="" type="checkbox"/>	01/21/2008	239	1

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## CLAIMING PROCESS

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Users can download files related to the eUID system by clicking the **Claiming Process** link in the *Menu*:



This feature allows users to:

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

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

### Claiming Overview

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



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



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



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

## Viewing Claims

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

To view and filter claims, users should perform the following steps:

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

Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status	Verified	Next Action
01/16/2008	<a href="#">37</a>	<a href="#">293-212-4684</a>	PERNSLEY, NATARO	Franklin Roosevelt Elementary School (0009-0102)	Pleasantville District (0007-0301)	Claimed	No	<a href="#">Respond</a>
01/16/2008	<a href="#">36</a>	<a href="#">696-317-6784</a>	ELKO, KAILYN	Franklin Roosevelt Elementary School (0009-0102)	Pleasantville District (0007-0302)	Claimed	No	<a href="#">Respond</a>
01/16/2008	<a href="#">35</a>	<a href="#">393-263-7062</a>	NICKALLS, CAILAN	James Madison High School (0009-0101)	Pleasantville District (0007-0501)	Claimed	No	<a href="#">Respond</a>
01/16/2008	<a href="#">34</a>	<a href="#">173-162-1477</a>	UTTERBACK, MARKESH	James Madison High School (0009-0101)	Pleasantville District (0007-0301)	Claimed	No	<a href="#">Respond</a>

- To display details about an individual claim, click the link in the Claim ID column on the Claim Process page.
- To display details about a specific student, click the link in the State ID column.

Student Information: [State ID : 100-113-7698] Created: 10/26/2007					
<b>First Name:</b>	JENNA K	<b>Middle Name:</b>		<b>Last Name:</b>	JONES-ALI
<b>School:</b>	0102 Franklin Roosevelt Elementary School	<b>Gender:</b>	MALE	<b>Local Student ID:</b>	6383612486
<b>Dist:</b>	0009 Allentown School District	<b>Date Of Birth:</b>	05/21/1995	<b>Ethnicity:</b>	Asian or Pacific Islander
<b>Res Dist:</b>	0009 Allentown School District	<b>Last Updated:</b>	10/26/2007	<b>Update Ref #:</b>	22145
				<b>Suffix:</b>	
				<b>Grade:</b>	10
				<b>Sch Yr:</b>	2007
				<b>Last Batch #:</b>	63

[Close Window](#)

- To display details about a Losing or Gaining School, click the link in the appropriate Losing or Gaining School column.
- To filter the list of claims displayed on this page, set the appropriate filters and click the **FILTER RESULTS** button. Users can filter on the following:
  - Claim Type:* This includes Auto Claim and Manual Claim.
  - Claim Status:* This includes All, Claimed, Responded and Deleted
  - Student Status:* This includes Active and Retired.
  - Verified States:* This includes All, Yes and No.
  - Date Range:* This allows the user to specify any valid date range.
  - School:* This includes All Schools and a list of available schools for the user.
- To sort the list of claims, set the appropriate sort filter and click the **FILTER RESULTS** button.

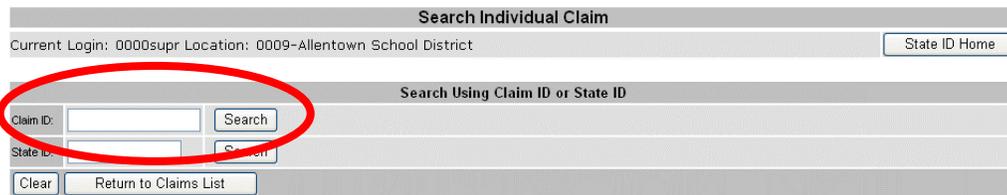
## Searching for a Claim

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

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



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



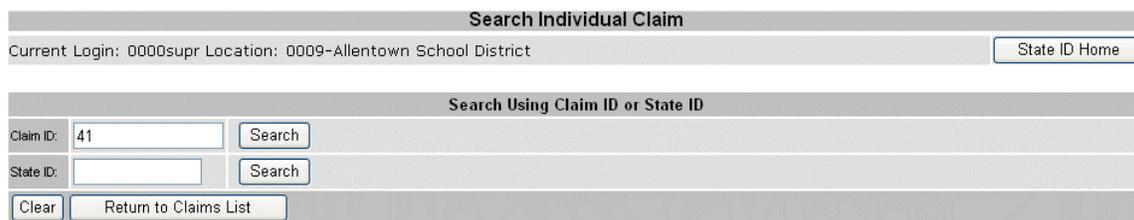
**Search Individual Claim**  
Current Login: 0000supr Location: 0009-Allentown School District [State ID Home](#)

**Search Using Claim ID or State ID**

Claim ID:

State ID:

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



**Search Individual Claim**  
Current Login: 0000supr Location: 0009-Allentown School District [State ID Home](#)

**Search Using Claim ID or State ID**

Claim ID: 41

State ID:

Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status	Verified	Next Action
01/23/2008	<a href="#">41</a>	<a href="#">106-579-8938</a>	BRUNO, CRISIA	Greenville District ( <a href="#">0008-0202</a> )	Franklin Roosevelt Elementary School ( <a href="#">0009-0102</a> )	Claimed	No	<a href="#">Details</a>

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

## Creating a Claim

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

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

**Claiming Process**

Current Login: 0000supr Location: 0009-Allentown School District State ID Home

Claim Type:  Claim Status: All Student Status: Active Verified Status: All

From: 12/23/2007 To: 01/23/2008 School: All Schools Sort: Claim Date Desc

Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status	Verified	Next Action
01/16/2008	37	293-212-4684	PERNSLEY, NATARO	Franklin Roosevelt Elementary School (0009-0102)	Pleasantville District (0007-0302)	Claimed	No	<input type="button" value="Respond"/>
01/16/2008	36	695-317-6784	ELKO, KAILYN	Franklin Roosevelt Elementary School (0009-0102)	Pleasantville District (0007-0302)	Claimed	No	<input type="button" value="Respond"/>
01/16/2008	35	393-263-7062	NICKALLS, CAILAN	James Madison High School (0009-0101)	Pleasantville District (0007-0301)	Claimed	No	<input type="button" value="Respond"/>
01/16/2008	34	173-162-1477	UTTERBACK, MARKESH	James Madison High School (0009-0101)	Pleasantville District (0007-0301)	Claimed	No	<input type="button" value="Respond"/>

3. To proceed with creating a claim, click the **CREATE A NEW CLAIM** button.

**Create A New Claim**

Current Login: 0000supr Location: 0009-Allentown School District State ID Home

**Search For Student To Be Claimed**

State ID:

4. Enter a valid State ID for the student transferring to the Gaining School.
5. Click the **SEARCH** button.



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

6. Verify the student details listed on the Student Information page.
7. Select / Enter details about the claim. The user should select / enter the following options:

- a. *School*: Use the dropdown menu to select the school the student is transferring to. This is a required field.
- b. *Grade Level*: Use the dropdown menu to select the grade level. This is a required field.
- c. *Claim Date*: Either type a valid date or use the calendar button to select a date. This is a required field.
- d. *Email*: Either type a valid email address of the Gaining School contact person or use the **...** button to the right of the email field to select an email address. Users can select the email from the list and click **FINISH**. Upon doing so, the email address the user selected will be placed in the Gaining School's email address. This is a required field.



This window will list all schools in the gaining district. If a school is selected prior to opening this window, the school's email address will be pre-selected. Otherwise, nothing will be selected.

- e. *CC1 - CC3*: Enter a valid email address.
- f. *Comments*: Enter any necessary comments.
- g. *Email Option*: Click the checkbox to send a copy of the email to the sender.

Student Information [634-300-7474] <a href="#">Add Note</a>					
First Name:	Georg	Middle Name:	U	Last Name:	Jetson
School:	0009-0102 Franklin Roosevelt Elementary School	Res. Dist:	0009	Local Student ID:	112
Gender:	MALE	Date Of Birth:	07/19/1980	Ethnicity:	
Created:	01/22/2008	Last Updated:	01/22/2008	Update Ref #:	613007
				Less Batch#:	218

New Claim Entry			
Gaining School		Losing School	
District:	Greenville District (0008)	District:	Allentown School District (0009)
* School:	Select A School	School:	Franklin Roosevelt Elementary School (0102)
* Grade Level:	Grade 4	Grade Level:	Grade 4
* Claim Date:	01/23/2008	Response Date:	
* Email:	jkoren@escholar.com <b>...</b>	* Email:	0102@0009.abc
CC1:		CC1:	
CC2:		CC2:	
CC3:		CC3:	
Comments: (maximum length 255 characters)		Comments: (maximum length 255 characters)	
<input type="checkbox"/> Email Option: Copy Mail to Sender			
* Required Fields		<input type="button" value="Create Claim"/> <input type="button" value="Return To Claims List"/>	

8. Click the **CREATE CLAIM** button to complete the claim request.

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

Create A New Claim									
Current Login: 0000supr Location: 0009-Allentown School District								<a href="#">State ID Home</a>	
System Message									
<div style="border: 2px solid red; border-radius: 50%; padding: 10px; display: inline-block;">           Claim Created.E-mail has been sent.         </div>									
Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status	Verified	Next Action	
01/23/2008	<a href="#">41</a>	<a href="#">106-579-8938</a>	BRUNO, CRISIA	Greenville District ( <a href="#">0008-0202</a> )	Franklin Roosevelt Elementary School ( <a href="#">0009-0102</a> )	Claimed	No	<a href="#">Details</a>	
<a href="#">Return To Claims List</a>									

11. Click the **STATE ID HOME** button or the **RETURN TO CLAIMS LIST** button to exit the confirmation page.



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

## Responding to a Claim

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

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

### Accepting Claims

When a Losing School accepts the claim, the student record is updated and the Gaining School obtains control of that student record. The Gaining School receives

an email from the system indicating the acceptance of the claim. To accept a claim, users should perform the following steps:

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



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

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

**Claiming Process**

Current Login: 0000supr Location: 0009-Allentown School District State ID Home

Claim Type: All 
 Claim Status: All 
 Student Status: Active 
 Verified Status: All

From: 12/23/2007 
 To: 01/23/2008 
 School: All Schools 
 Sort: Claim Date Desc

Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status	Verified	Next Action
01/23/2008	<a href="#">38</a>	<a href="#">634-300-7474</a>	Jetson, Georg	Franklin Roosevelt Elementary School ( <a href="#">0009-0102</a> )	Greenville District ( <a href="#">0008-0201</a> )	Claimed	No	<input type="button" value="Respond"/>
01/23/2008	<a href="#">39</a>	<a href="#">409-355-1308</a>	Moideen, Nishad	Greenville District ( <a href="#">0008-0201</a> )	Franklin Roosevelt Elementary School ( <a href="#">0009-0102</a> )	Claimed	No	<input type="button" value="Details"/>

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

Student Information [634-300-7474] <a href="#">Add Note</a>							
First Name:	Georg	Middle Name:	U	Last Name:	Jetson	Suffix:	
School:	0009-0102 Franklin Roosevelt Elementary School	Res. Dist:	0009	Local Student ID:	112	Grade:	Grade 4
Gender:	MALE	Date Of Birth:	07/19/1980	Ethnicity:		Sch. Yr.:	2008
Created:	01/22/2008	Last Updated:	01/22/2008	Update Ref #:	613007	Last Batch#:	218

Claim Information [Claim ID: 38]			
Gaining School		Losing School	
District:	Greenville District (0008)	District:	Allentown School District (0009)
School:	Greenville District (0201)	School:	Franklin Roosevelt Elementary School (0102)
Grade Level:	Grade 4	Grade Level:	Grade 4
Claim Date:	01/23/2008	Response Date:	01/23/2008
Email:	ikoren@escholar.com	Email:	0102@0009.abc
CC1:		CC1:	
CC2:		CC2:	
CC3:		CC3:	
Comments: (maximum length 255 characters)			Comments: (maximum length 255 characters)
Claim Status: Claimed		Email Status: Not Sent	
Email Option: <input type="checkbox"/> Copy Mail to Sender			
* Required Fields			
<input type="button" value="Accept Claim"/>		<input type="button" value="Dispute Claim"/>	
<input type="button" value="Return To Claims List"/>			

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

7. Click the **ACCEPT CLAIM** button.

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

- If JavaScript is enabled in the browser, users will be prompted with a confirmation dialog box and should click the **OK** button. If JavaScript is not enabled no prompt is displayed.
- The Claims Details page will display a System Message along with other details about the claim.

Create A New Claim									
Current Login: 0000supr Location: 0009-Allentown School District								<input type="button" value="State ID Home"/>	
System Message									
<b>Claim Created.E-mail has been sent.</b>									
Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status	Verified	Next Action	
01/23/2008	<a href="#">42</a>	<a href="#">880-162-2163</a>	HEPAK, MICHEAL OR	Greenville District ( <a href="#">0008-0202</a> )	Franklin Roosevelt Elementary School ( <a href="#">0009-0102</a> )	Claimed	No	<input type="button" value="Details"/>	
<input type="button" value="Return To Claims List"/>									

10. Click the **RETURN TO CLAIMS LIST** to continue processing claims or click the **STATE ID HOME** button to return to the home page.

## Disputing Claims

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

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

## Deleting a Claim

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

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

Search Individual Claim									
Current Login: 0000supr Location: 0009-Allentown School District									State ID Home
Search Using Claim ID or State ID									
Claim ID:	41	Search							
State ID:		Search							
Clear	Return to Claims List								
Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status	Verified	Next Action	
01/23/2008	<a href="#">41</a>	<a href="#">106-579-8938</a>	BRUNO, CRISIA	Greenville District <a href="#">(0008-0202)</a>	Franklin Roosevelt Elementary School <a href="#">(0009-0102)</a>	Claimed	No	<a href="#">Details</a>	

4. The Claims Details page will be displayed allowing the user to delete a claim, view transaction information and return to the claims list.

- Click the **DELETE CLAIM** button.

Claim Details					
Current Login: 0000supr Location: 0009-Allentown School District					State ID Home
Student Information [640-047-4552]					
First Name:	John	Middle Name:		Last Name:	Petterson
School:	0008-0201 John Kennedy High School	Res. Dist:	0008	Local Student ID:	213213a
Gender:	MALE	Date Of Birth:	01/01/1992	Ethnicity:	WHITE, NOT OF HISPANIC ORIGIN
Created:	06/07/2006	Last Updated:	06/07/2006	Update Ref #:	237
				Suffix:	
				Grade:	10
				Sch. Yr:	2006
				Last Batch#:	33
Claim Information [Claim ID : 1]					
Gaining School			Losing School		
District:	Springfield School District (0009)		District:	Springfield School District (0008)	
School:	James Madison High School (0101)		School:	John Kennedy High School (0201)	
Grade Level:	10		Grade Level:	10	
Claim Date:	06/12/2006		* Response Date:	06/19/2006	
Email:	0101@0009.abc		* Email:	0201@0008.abc	
CC1:			CC1:		
CC2:			CC2:		
CC3:			CC3:		
Comments: (maximum length 255 characters)			Comments: (maximum length 255 characters)		
<input type="text"/>			<input type="text"/>		
Email Option: <input type="checkbox"/> Copy Mail to Sender					
* Required Fields			Delete Claim	Return to Claims List	

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

## Verifying a Claim

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

available for Accepted Claims. To verify a claim, users should perform the following steps:

1. Click the **Claiming Process** link on the *Menu*.
2. Click the **DETAILS** button for an Accepted Claim. The status of the claim is displayed in the Status column.
3. Review the details of the accepted claim.

Student Information [634-300-7474] <a href="#">Add Note</a>					
First Name:	Georg	Middle Name:	U	Last Name:	Jetson
School:	0009-0201 Franklin Roosevelt Elementary School	Res. Dist:	0009	Local Student ID:	112
Gender:	MALE	Date Of Birth:	07/19/1980	Ethnicity:	
Created:	01/22/2008	Last Updated:	01/23/2008	Update Ref #:	643100
				Last Batch#:	258

Claim Information [Claim ID: 38 ]			
Gaining School		Losing School	
District:	Greenville District (0008)	District:	Allentown School District (0009)
School:	Greenville District (0201)	School:	Franklin Roosevelt Elementary School (0102)
Grade Level:	Grade 4	Grade Level:	Grade 4
Claim Date:	01/23/2008	Response Date:	01/23/2008
Email:	ikoren@escholar.com	Email:	0102@0009.abc
CC1:		CC1:	
CC2:		CC2:	
CC3:		CC3:	
Comments: (maximum length 255 characters)		Comments: (maximum length 255 characters)	
<input type="text"/>		<input type="text"/>	
Claim Status: Accepted			
Email Status: Not Sent			
<input type="button" value="Mark Verified"/>		<input type="button" value="Return To Claims List"/>	

4. Click the **MARK VERIFIED** button.
5. The system will update the Verified status to Yes for the claim.

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

6. Click the **RETURN TO CLAIMS LIST** to continue processing claims or click the **STATE ID HOME** button to return to the home page.

## Resending a Claim-Related Email

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

1. Click the **Claiming Process** link on the *Menu*.

- The **Claiming Process** page will display a list of claims. This list will include any claims that apply to the district / school either as the Gaining or Losing School.
- Identify the Claim ID that requires the email to be resent.
- Click the **RESEND EMAIL** button on the Claiming Process page.

**Claiming Process**

Current Login: 0000supr Location: 0009-Allentown School District State ID Home

Claim Type: All 
 Claim Status: All 
 Student Status: Active 
 Verified Status: All

From: 12/23/2007  To: 01/23/2008 
 School: All Schools  Sort: Claim Date Desc

Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status	Verified	Next Action
01/23/2008	<a href="#">38</a>	<a href="#">634-300-7474</a>	Jetson, Georg	Franklin Roosevelt Elementary School ( <a href="#">0009-0102</a> )	Greenville District ( <a href="#">0008-0201</a> )	Claimed	No	<input type="button" value="Respond"/>
01/23/2008	<a href="#">39</a>	<a href="#">409-355-1308</a>	Moideen, Nishad	Greenville District ( <a href="#">0008-0201</a> )	Franklin Roosevelt Elementary School ( <a href="#">0009-0102</a> )	Claimed	No	<input type="button" value="Details"/>

- A Resend Email page will be displayed, requiring the user to enter the appropriate Claim ID. Enter this Claim ID.
- Click the **SEARCH** button.

**Resend E-mail**

Current Login: 0000supr Location: 0009-Allentown School District State ID Home

**Search Claim To Resend Email**

Claim ID:

- Review the Claim Details page. This page lists all the details about the selected claim and a link to view the transaction reference information.

**Resend E-mail**

Current Login: 0000supr Location: 0009-Allentown School District State ID Home

**Student Information [106-579-8938]**

First Name: CRISIA	Middle Name:	Last Name: BRUNO	Suffix:
School: 0008-0202 Greenville District	Res. Dist: 0008	Local Student ID: 838869332164	Grade: Grade 4
Gender: MALE	Date Of Birth: 04/23/1990	Ethnicity: Black (Not Hispanic)	Sch. Yr: 2009
Created: 01/10/2008	Last Updated: 01/10/2008	Update Ref #: 578182	Last P...: 209

**Claim Information [Claim ID: 41]**

Gaining School		Losing School	
District:	Allentown School District (0009)	District:	Greenville District (0008)
School:	Franklin Roosevelt Elementary School (0102)	School:	Greenville District (0202)
Grade Level:	Grade 4	Grade Level:	Grade 4
Claim Date:	01/23/2008	* Response Date:	
Email:	0000@0009.abc	Email:	ikoren@escholar.com
CC1:		CC1:	
CC2:		CC2:	
CC3:		CC3:	
Comments: (maximum length 255 characters)	<input type="text"/>	Comments: (maximum length 255 characters)	<input type="text"/>

Claim Status: Deleted  
 Email Status: Sent

8. Click **SEND EMAIL** to resend the most recent email for that claim.
9. The Claims Details page will display a System Message along with other details about the claim.

Resend E-mail									
Current Login: 0000supr Location: 0009-Allentown School District									State ID Home
System Message									
E-mail has been sent.									
Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status	Verified	Next Action	
01/23/2008	41	106-579-8938	BRUNO, CRISIA	Greenville District (0008-0202)	Franklin Roosevelt Elementary School (0009-0102)	Deleted	No	Details	
Return To Claims List									

10. Click the **RETURN TO CLAIMS LIST** to continue processing claims or click the **STATE ID HOME** button to return to the home page.



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



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

## Extracting & Downloading Claim-Related Files

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

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

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

1. Click the **Claiming Process** link on the *Menu*.

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

**Claiming Process**

Current Login: 0000supr Location: 0009-Allentown School District State ID Home

Claim Type: 
 Claim Status: 
 Student Status: 
 Verified Status:

From:  To: 
 School: 
 Sort:

Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status	Verified	Next Action
01/23/2008	<a href="#">38</a>	<a href="#">634-300-7474</a>	Jetson, Georg	Franklin Roosevelt Elementary School ( <a href="#">0009-0102</a> )	Greenville District ( <a href="#">0008-0201</a> )	Claimed	No	<input type="button" value="Respond"/>
01/23/2008	<a href="#">39</a>	<a href="#">409-355-1308</a>	Moideen, Nishad	Greenville District ( <a href="#">0008-0201</a> )	Franklin Roosevelt Elementary School ( <a href="#">0009-0102</a> )	Claimed	No	<input type="button" value="Details"/>

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

**Extract & Download Batch**

Current Login: 0000supr Location: 0009-Allentown School District State ID Home

Claim Type: 
 Extract Type: 
 Sort:

From:  To:

Upload Date	Batch Info	Status	Record Count	Next Action
01/23/2008	<input type="text" value="262"/>	Deleted Claims.	1	<input type="button" value="Extract Records"/> <input type="button" value="Add To Download Cart"/>
01/23/2008	<input type="text" value="261"/>	Deleted Claims.	1	<input type="button" value="Extract Records"/> <input type="button" value="Add To Download Cart"/>

Displaying 1 to 2 of 2

- All of the claims matching the filter options will be displayed in the list.
- The **Claiming Extract & Download** functionality works the same as the **Extract & Download** process described above in the **Extract & Download**

section, with the exception of the available filters. That is, users can extract and download individual files or multiple files, delete files from the cart, or clear the cart. Please review **Extract & Download** section above for detailed information.

8. Extract individual or multiple records as described in the **Extract & Download** section above.

## Adding Student Notes

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

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

Student Information [887-626-7171] <a href="#">Add Note</a>					
First Name:	STYL	Middle Name:		Last Name:	RENY
School:	0009-0102 Franklin Roosevelt Elementary School	Res. Dist:	0009	Local Student ID:	1002
Gender:	FEMALE	Date Of Birth:	12/12/1999	Ethnicity:	HISPANIC
Created:	01/29/2008	Last Updated:	01/29/2008	Update Ref #:	2
				Suffix:	
				Grade:	01
				Sch. Yr:	2008
				Last Batch#:	4
Claim Information [Claim ID: 1]					
Gaining School			Losina School		

Figure 8: Student Information (File Format 1.0)

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

## Viewing Student Notes

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

1. Click the **Claiming Process** link on the *Menu*.
2. The Claiming Process page will display a list of claims.
3. Click the Details button.
4. If notes have been added, a magnifying glass icon will be displayed to the right of the Student Information and State ID in the top row of the details.

Student Information [887-686-7171]  Add Note					
First Name:	STYL	Middle Name:		Last Name:	RENZY
School:	0009-0102 Franklin Roosevelt Elementary School	Res. Dist:	0009	Local Student ID:	1002
Gender:	FEMALE	Date Of Birth:	12/12/1999	Ethnicity:	HISPANIC
Created:	01/29/2008	Last Updated:	01/29/2008	Update Ref #:	2
				Last Batch#:	4

Claim Information [Claim ID: 1]	
Gaining School	Losing School

Figure 9: Student Information (File Format 1.0)

Student Information: [Internal ID : 7524595212] Created: 03/31/2009  Add Note					
First Name:	Johan	Middle Name:		Last Name:	Haarman
Suffix:		School:	702 C A Dillon School	Gender:	Male
Grade:	KG	Dist:	998 NC Juvenile Justice	Date Of Birth:	11/05/1983
SSN:	Not Present	Sch Yr:	2009	Res Dist:	998 NC Juvenile Justice
Update Ref #:	43	Last Batch #:	21	Source System:	NCW
Alternate Source:	NCW			NCWISE:	100-11583

History Information										
History Date	Last Name	First Name	Middle Name	Suffix	Gender	Date Of Birth	Race/Ethnicity	SSN	District	School
03/31/2009	Haarman	Johan			Female	11/05/1983	Asian or Pacific Islander	Not Present	998	702

Figure 10: Student Information (File Format 2.0 with Customer Defined Fields)

5. Click the magnifying glass icon to view the notes.
6. A new window will open displaying the available notes for the student. The system will provide information on the user ID, creation date, the text of the note and the note type.

Admin Notes		General Notes	
STYL RENZY [GTID: 887-686-7171]			
Creation User ID	Creation Date	Note Text	Note Type
0000supr	01/29/2008	These are student notes added by a general user.	General



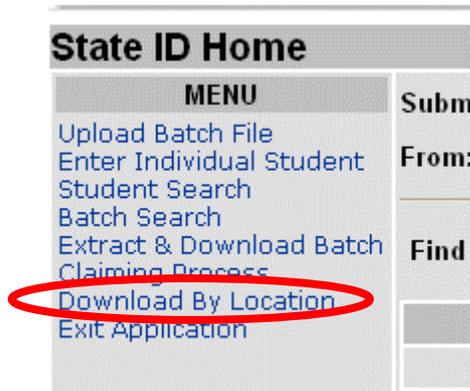
**NOTE:** The system contains Administrator and General Notes. Administrator Notes are visible only to administrators while General Notes are viewable by anyone with authorization to view General Notes.

---

## DOWNLOAD BY LOCATION

---

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



This feature will allow user to perform the following actions:

- Search for a location.
- Download students from a specific location.

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

### Searching for a Location

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

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

**Download By Location** 

Current Login: 0000supr Location: 998-NC Juvenile Justice Uniq-ID

**Search**

District Code	School Code	Agency Name	
001	000	-District 001	<b>Download</b>
002	000	-District 002	<b>Download</b>
003	000	-District 003	<b>Download</b>
008		District 008	<b>Download</b>
009	101	District 009A-School 101	<b>Download</b>
009	102	District 009A-School 102	<b>Download</b>
009		District 009A	<b>Download</b>
010	303	Alamance-Burlington-Alamance-Burlington	<b>Download</b>

Displaying 1 to 8 of 2722 First Prev Next Last

3. The search feature allows users to search by the district code, school code or agency name.
4. Enter the text to search for in the Search form.

**Download By Location**

Current Login: 0000supr Location: 009-Allentown School District State ID Home

**Search**

District Code	School Code	Agency Name	
007		Pleasantville School District	<b>Download</b>
007	301	Pleasantville School District-Abraham Lincoln High School	<b>Download</b>
007	302	Pleasantville School District-George Washington Middle School	<b>Download</b>
008		Springfield School District	<b>Download</b>
008	301	Springfield School District-John Kennedy High School	<b>Download</b>
008	302	Springfield School District-Thomas Jefferson Elementary School	<b>Download</b>
009		Allentown School District	<b>Download</b>
009	101	Allentown School District-James Madison High School	<b>Download</b>

Displaying 1 to 8 of 9 First Prev Next Last

- a. When a *number* is typed into the search form, the system searches for all of the districts and schools with that code.
- b. When *partial numbers* are typed into the search form, the system searches for all of the districts and schools with that partial number.
- c. When *text* is used, the system searches for all of the agency names matching the search phrase.



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

5. Click the **SEARCH** button.

6. The system will display the results on the **Download By Location** details page.

Download By Location 			
Current Login: 0000supr Location: 998-NC Juvenile Justice			Uniq-ID
<input type="text"/>			Search
District Code	School Code	Agency Name	
001	000	-District 001	Download
002	000	-District 002	Download
003	000	-District 003	Download
008		District 008	Download
009	101	District 009A-School 101	Download
009	102	District 009A-School 102	Download
009		District 009A	Download
010	303	Alamance-Burlington-Alamance-Burlington	Download
Displaying 1 to 8 of 2722			First Prev Next Last

7. To fine tune the search, add addition search text / numbers as needed.

8. Proceed to the **Downloading Students By Location** section below.

## Downloading Students By Location

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

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

Download By Location 			
Current Login: 0000supr Location: 998-NC Juvenile Justice			Uniq-ID
<input type="text"/>			Search
District Code	School Code	Agency Name	
001	000	-District 001	Download
002	000	-District 002	Download
003	000	-District 003	Download
008		District 008	Download
009	101	District 009A-School 101	Download
009	102	District 009A-School 102	Download
009		District 009A	Download
010	303	Alamance-Burlington-Alamance-Burlington	Download
Displaying 1 to 8 of 2722			First Prev Next Last

3. The system will display a **Download Options** screen.

Download Options	
Current Login: 0000supr Location: 998-NC Juvenile Justice	
Template:	eScholar Uniq-ID <sup>®</sup> v2.0 ▼
Field Delimiter:	TAB ▼
Field Qualifier:	▼
Date Format:	mm/dd/yyyy ▼
Include Header/Footer:	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="button" value="Download"/> <input type="button" value="Back"/>	

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

Download Options	
Current Login: 0000supr Location: 998-NC Juvenile Justice	
Template:	eScholar Uniq-ID <sup>®</sup> v2.0 ▼
Field Delimiter:	TAB ▼
Field Qualifier:	▼
Date Format:	mm/dd/yyyy ▼
Include Header/Footer:	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="button" value="Download"/> <input type="button" value="Back"/>	

- a. *Template* - eScholar Uniq-ID<sup>®</sup> v1.0 or eScholar Uniq-ID<sup>®</sup> v2.0
- b. *Field Delimiter*: The options for this selection are Tab or Comma.
- c. *Field Qualifier*: The options for this selection are “ and ‘.
- d. *Date Format*: The options for this selection are:
  - mm/dd/yyyy
  - mm/d/yyyy
  - ISO YYYY-MM-DD
  - m/d/yyyy
  - m/dd/yyyy



- e. *Include Header / Footer*. The options for this selection are Yes and No. When No is selected, the header and footer will not be included in the extracted file.
- 4. Select the appropriate download options.
- 5. Click the **DOWNLOAD** button.
- 6. The Download By Location download page will be displayed. Click the **here** link in the Status column.

Download By Location				
Current Login: uid_staff Location: 001-ALBUQUERQUE				State ID Home
Upload Date	Batch Info	Status	Record Count	Next Action
		File Extract Complete. Click <a href="#">here</a> to download the file.	127202	Extract Another Location

- 7. Click the **EXTRACT ANOTHER LOCATION** button to return to the Download By Location page or click the **STATE ID HOME** button to return to the system home page.



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## EXIT APPLICATION

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

---

## CHANGE DISTRICTS

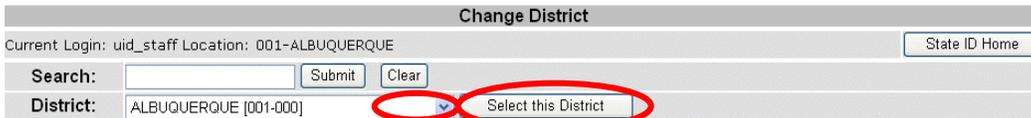
---

Users can change their current location by clicking the **Change District** link in the Admin Menu. This feature, when enabled, allows authorized users to change the current district access. This menu item will only be visible to those users who are authorized to change districts. This is typically available to the Multi District and Multiple District with Specific School user roles.

### Changing a District Selection

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

1. Click on the **Change District** link on the *Admin Menu*.
2. Select a district from the **District** dropdown list to change the current district.
3. Click the **SELECT THIS DISTRICT** button.



### Searching for a District

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

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

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

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

---

## **NEAR MATCH NOTIFICATIONS**

---

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

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

---

## **AUTOMATIC FILE PROCESSING (AFP)**

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

## APPENDIX A – BATCH INFO WINDOW

Throughout the eUID system, users can view detailed information about a particular submission by opening the **Batch Info** window:

**State ID Home** Current Login: 0101usr1 Location: 0009 - James Madison High School

**MENU**  
[Upload Batch File](#)  
[Enter Individual Student](#)  
[Student Search](#)  
[Batch Search](#)  
[Extract & Download Batch](#)  
[Claiming Process](#)  
[Download By Location](#)  
[Exit Application](#)

Submission Type: All Processing Stage: All Sort: Upload Date Desc

From: 12/24/2007 To: 01/24/2008

Find Batch:

Upload Date	Batch Info	Status	Record Count	Next Action
01/24/2008	268	Near Matches / Duplicates Found	1	<input type="button" value="Resolve Near Matches"/>
01/24/2008	266	Data Validation Incomplete. Fix Data Errors	8	<input type="button" value="Fix Errors"/>
01/24/2008	265	Data Validation Complete. Ready to Assign State IDs	1	<input type="button" value="Assign State ID"/>

Displaying 1 to 3 of 3

**Batch Information : Batch 233**

<b>Batch Number</b>	233
<b>Submission Type</b>	File
<b>Batch Status</b>	DATA ERRORS PENDING
<b>District Code</b>	0009
<b>School Code</b>	0000
<b>Extract Date</b>	10/31/2007
<b>Extract File</b>	DataErrors3.txt
<b>Transmission ID</b>	0071262134
<b>Creation User ID</b>	0000supr
<b>Creation Date</b>	01/18/2008
<b>Total Records</b>	9
<b>Record Delimiter</b>	0x09
<b>Header Delimiter</b>	0x09
<b>File Version</b>	1.0

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

## Batch Statistics Tab

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

Batch Information : Batch 8	
<u>Batch Statistics</u>	<u>Processing Info</u>
<b>ID Assignment Complete</b>	
New ID Assigned - No Matching Record Found	49080
<b>Canceled</b>	
Canceled During Match Resolution Stage	2
Canceled During Fix Errors Stage	918

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

## Processing Info Tab

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

Batch Information : Batch 8	
<u>Batch Statistics</u>	<u>Processing Info</u>
01/28/2008 05:50:22 PM	Upload Completed
01/28/2008 05:51:54 PM	Validation Started
01/28/2008 06:06:32 PM	Validation Completed
01/28/2008 06:09:46 PM	Fix Error Started
01/28/2008 06:09:46 PM	Fix Error Completed
01/28/2008 06:09:53 PM	Assignment Started
01/28/2008 07:06:07 PM	Assignment Continued
01/28/2008 11:25:19 PM	Assignment Completed
01/29/2008 10:45:07 AM	Resolve Near Match Started
01/29/2008 10:45:07 AM	Resolve Near Match Completed

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

## Download Info Tab

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

**Batch Information : Batch 8**

[Batch Statistics](#)   
 [Processing Info](#)   
 [Download Info](#)   
 [General Info](#)

---

01/29/2008 10:45:58 AM                      0000supr

## General Info Tab

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

**Batch Information : Batch 8**

[Batch Statistics](#)   
 [Processing Info](#)   
 [Download Info](#)   
 [General Info](#)

<b>Batch Number</b>	8
<b>Submission Type</b>	File
<b>Batch Status</b>	ID CREATION COMPLETE
<b>District Code</b>	0009
<b>School Code</b>	1111
<b>Extract Date</b>	03/10/2004
<b>Extract File</b>	1_student.txt
<b>Transmission ID</b>	0071262134
<b>Creation User ID</b>	0000supr
<b>Creation Date</b>	01/28/2008
<b>Total Records</b>	49082
<b>Record Delimiter</b>	,
<b>Header Delimiter</b>	0x09
<b>File Version</b>	1.0

---

## APPENDIX B – BATCH RECORD STATUSES

---

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

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

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## APPENDIX C – CANCELED RECORDS ERROR MESSAGES

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### Canceled Record Comments

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

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



<b>Canceled Record Comments</b>
User is not authorized to submit student for the specified district.(XXXinvalid valueXXX)
Record Type is not present.
Record Type is not valid.(XXXinvalid valueXXX)
Data not valid in a customer defined field.
Alternate Last Name is not valid.(XXXinvalid valueXXX)
Alternate Last Name is not present.
Data not present in a required customer defined field.
Alternate source is not present.
Alternate ID is not present.

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

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

## APPENDIX D: BATCH SEARCH FILE FORMAT

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

Field Name	Required	System - Data type	File Format Version	Notes/Format Details
Record Type	Yes	VarChar (2)		Always 'ID'.
Current School Code	No	VarChar (20)		School Code where the student is currently enrolled. If a value is submitted, it is validated.
Resident District Code	No	VarChar (20)		District where the student is currently a resident. A System Property can make this field optional. If a value is submitted, it is validated.
Last Name	Yes	VarChar (60)		Legal last name of the student. <i>Matching Field</i> .
First Name	Yes	VarChar (60)		Legal first name of the student. <i>Matching Field</i>
Middle Name	No	VarChar (60)		Legal middle name of the student. <i>Matching Field</i>
Name Suffix	No	VarChar (10)		
Gender	No	VarChar (6)		If a value is submitted, it is validated. State-defined Gender Codes. This should be submitted when available since it will impact the match results. <i>Matching Field</i>
Date of Birth	No	VarChar (10)		If a value is submitted, it is validated. This should be submitted when available since it will impact the match results. Can be in one of the following formats: <ul style="list-style-type: none"> <li>• mm/dd/yyyy</li> <li>• m/d/yyyy</li> <li>• mm/d/yyyy</li> <li>• m/dd/yyyy</li> <li>• yyyy-dd-mm</li> </ul> <i>Matching Field</i>
Current Grade Level	No	VarChar (2)		If a value is submitted, it is validated. State-defined Grade Level Code.
Local Student ID	No	VarChar (20)		ID used in the local Student Information System to uniquely identify the student in the submitting system. The primary purpose of this field is to provide a mechanism to import student data from the eScholar Uniq-ID <sup>®</sup> for Students system back into the local source systems. In addition, this field is used in a limited capacity to match student records within the eScholar Uniq-ID <sup>®</sup> for Students system. This field can be set to optional for Online Entry only.
Social Security Number	No	VarChar (11)		It is not required for matching, but will be used if it is supplied. <i>Matching Field</i>

Race / Ethnicity	No	VarChar (4)		If a value is submitted, it is validated.State-defined Race / Ethnic code. Can be optional if Make Ethnic Code Option System Property is enabled.
State ID	No	VarChar (25)		Batch Search will fail if the State ID is submitted.
Current District Code	No	VarChar (20)		If a value is submitted, it is validated. District Code where the student is currently enrolled. State-defined valid
Current School Year	No	VarChar (10)		Must have a 'yyyy' format.
Alternate Last Name	No	VarChar (60)	V2 only	This field should be used for the birth surname, alternate last name, or former last name of the student. Blank submissions are ignored if an Alternate Last Name was previously submitted. To clear an Alternate Last Name, the word NULL in all capital letters must be supplied during submission for this field. <i>Matching Field</i>
Alternate ID	No	VarChar (50)	V2 only	This is an ID used in the system defined in the Alternate Source field. If Alternate Source is provided, this field is required.
Alternate Source	No	VarChar (60)	V2 only	This is the source name for the Alternate ID field. This can be used to track additional local identifiers or other state identifiers. If Alternate ID is required, this field is required.
Customer Defined Field 1	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 2	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 3	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 4	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 5	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 6	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined

				Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 7	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 8	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Record Status	No		V2 only	This field is the internal transaction status result for the record and is provided in the output file. This field should be blank on input. Any values on input will be ignored.
Record Reference Number	No		V2 only	This field is the internal transaction identifier for the record as part of the output file. This field should be blank on input. Any values on input will be ignored.