



# Uniq-ID System Version 5.0.x Application User's Guide

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## ABOUT THIS MANUAL

This manual is designed as a reference guide for the eScholar Uniq-ID System™ (State ID System). This application helps you to:

- Assign a unique statewide student identifier for every student in pre-kindergarten, kindergarten, elementary, and secondary public education.
- Identify and locate a student from the statewide Uniq-ID database either using the State ID, student demographics (e.g., last name), or with a batch file.
- Claim students who have transferred to a new school and/or district. In addition, the schools involved are able to communicate with each other through emails generated by the State ID System.

This manual includes some notes and tips that are designed to highlight important topics. Each topic begins on a new page to make it easier to find information in this manual.



**NOTE:** This box mentions 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 State ID System. The pointing hand always indicates a **TIP**.

## OPENING THE WEB APPLICATION

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### LOGGING INTO THE UNIQ-ID WEB APPLICATION

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The following *Login* screen displays when a user opens a browser and enters the eScholar Uniq-ID System URL:

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

Login	
Login ID:	<input type="text"/>
Password:	<input type="password"/>
<input type="button" value="Clear"/> <input type="button" value="Submit"/>	

1. Enter a login and password.
2. Click **SUBMIT**.



**TIP:** The user should not use the **REFRESH**, **BACK**, or **FORWARD** browser buttons with the eScholar Uniq-ID System. There are links on every page to direct the user to other screens.



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

Below is the Uniq-ID System main page:

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

<p><b>MENU</b></p> <ul style="list-style-type: none"> <li>Upload Batch File</li> <li>Enter Individual Student</li> <li>Student Search</li> <li>Batch Search</li> <li>Extract &amp; Download Batch</li> <li>Claiming Process</li> <li>Exit Application</li> </ul>	<p>Submission Type: <input type="text" value="All"/> Processing Stage: <input type="text" value="All"/> Sort: <input type="text" value="Upload Date Desc"/> <input type="button" value="Filter Results"/></p> <p>From: <input type="text" value="05/22/2006"/> To: <input type="text" value="06/21/2006"/></p> <p>Find Batch: <input type="text"/> <input type="button" value="Search"/></p> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th>Upload Date</th> <th>Batch Info</th> <th>Status</th> <th>Record Count</th> <th>Next Action</th> </tr> </thead> <tbody> <tr><td>06/21/2006</td><td><input type="text" value="198"/></td><td>IDs Assigned</td><td>1</td><td><input type="button" value="Download State ID"/></td></tr> <tr><td>06/21/2006</td><td><input type="text" value="197"/></td><td>IDs Assigned</td><td>1</td><td><input type="button" value="Download State ID"/></td></tr> <tr><td>06/21/2006</td><td><input type="text" value="196"/></td><td>ID Assigned</td><td>1</td><td><input type="button" value="Download State ID"/></td></tr> <tr><td>06/21/2006</td><td><input type="text" value="195"/></td><td>IDs Assigned</td><td>1</td><td><input type="button" value="Download State ID"/></td></tr> <tr><td>06/21/2006</td><td><input type="text" value="194"/></td><td>ID Assigned</td><td>1</td><td><input type="button" value="Download State ID"/></td></tr> <tr><td>06/21/2006</td><td><input type="text" value="193"/></td><td>IDs Assigned</td><td>1</td><td><input type="button" value="Download State ID"/></td></tr> <tr><td>06/21/2006</td><td><input type="text" value="192"/></td><td>IDs Assigned</td><td>1</td><td><input type="button" value="Download State ID"/></td></tr> <tr><td>06/21/2006</td><td><input type="text" value="191"/></td><td>IDs Assigned</td><td>1</td><td><input type="button" value="Download State ID"/></td></tr> </tbody> </table> <p>Displaying 1 to 8 of 67 <span style="float: right;"><input type="button" value="First"/> <input type="button" value="Prev"/> <input type="button" value="Next"/> <input type="button" value="Last"/></span></p>	Upload Date	Batch Info	Status	Record Count	Next Action	06/21/2006	<input type="text" value="198"/>	IDs Assigned	1	<input type="button" value="Download State ID"/>	06/21/2006	<input type="text" value="197"/>	IDs Assigned	1	<input type="button" value="Download State ID"/>	06/21/2006	<input type="text" value="196"/>	ID Assigned	1	<input type="button" value="Download State ID"/>	06/21/2006	<input type="text" value="195"/>	IDs Assigned	1	<input type="button" value="Download State ID"/>	06/21/2006	<input type="text" value="194"/>	ID Assigned	1	<input type="button" value="Download State ID"/>	06/21/2006	<input type="text" value="193"/>	IDs Assigned	1	<input type="button" value="Download State ID"/>	06/21/2006	<input type="text" value="192"/>	IDs Assigned	1	<input type="button" value="Download State ID"/>	06/21/2006	<input type="text" value="191"/>	IDs Assigned	1	<input type="button" value="Download State ID"/>
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06/21/2006	<input type="text" value="191"/>	IDs Assigned	1	<input type="button" value="Download State ID"/>																																										

The State ID System main page consists of two main sections:

- The left-hand Menu contains links that allow users to upload Student Batch Files, enter individual students, perform student searches, download various types of output files, claim/release transferring students, and exit the application.
- The right-hand section provides the user with a list of all submissions to the Uniq-ID System that have been either uploaded via a batch file, entered online, submitted using SLF, or edited online. This list displays the current status of each batch and the next action to be performed on that batch. In addition, a button in the last column allows the user to continue where they left off in the State ID assignment process.
- The right-hand section also provides a number of different ways to filter the submission list.



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



**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.

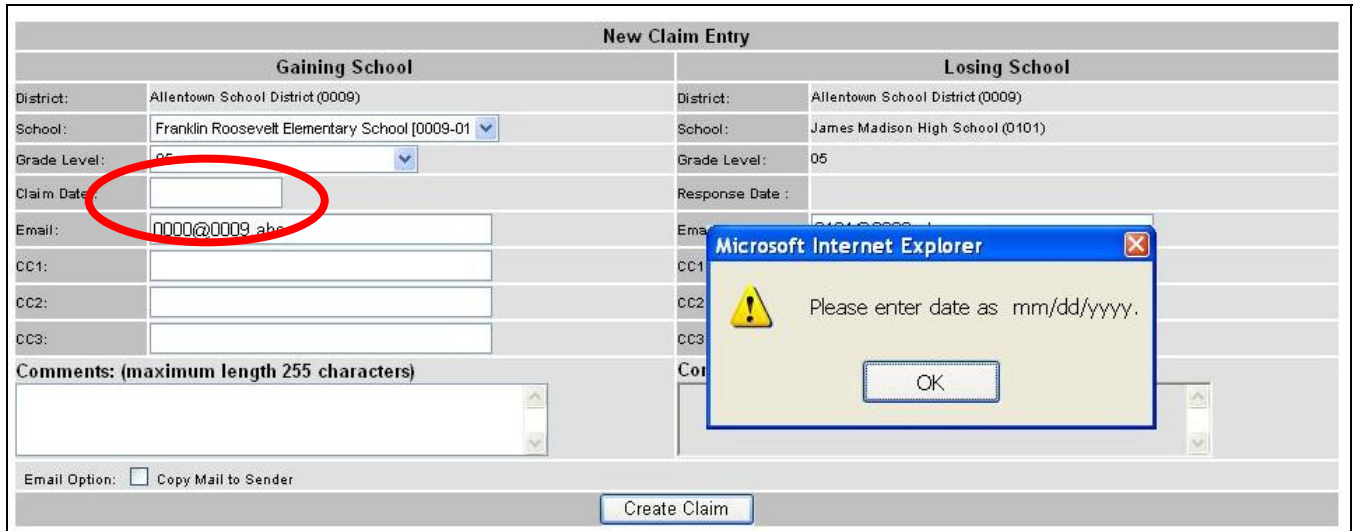


**TIP:** The eScholar Uniq-ID System contains many pages which display lists of items. All lists are page loaded and may not show all rows on one page. Users can navigate to other pages in a list using the **FIRST**, **PREV**, **NEXT**, and **LAST** buttons on the bottom of each page.



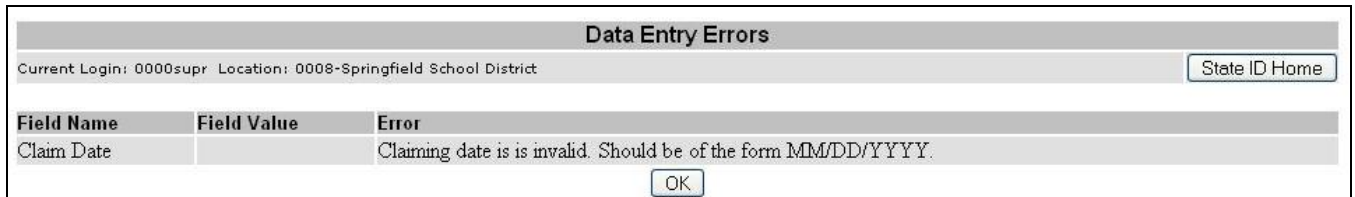
**NOTE:** In order for the eScholar Uniq-ID System to be fully compliant with Section 508 of the Rehabilitation Act, all functionality must work as intended if client-side scripting languages (e.g., JavaScript) are disabled. Below are some sample screenshots depicting what a user sees with scripting enabled and what they see with scripting 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.



The screenshot shows the 'New Claim Entry' form with two columns: 'Gaining School' and 'Losing School'. The 'Gaining School' column has fields for District, School, Grade Level, Claim Date, Email, CC1, CC2, CC3, and Comments. The 'Losing School' column has fields for District, School, Grade Level, Response Date, Email, CC1, CC2, CC3, and Comments. A red circle highlights the 'Claim Date' field in the 'Gaining School' column. A pop-up message from Microsoft Internet Explorer is displayed over the form, stating: 'Please enter date as mm/dd/yyyy.' with an 'OK' button.

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. However, the error described on the page is usually the same as the pop-up message. An example displays below.



The screenshot shows the 'Data Entry Errors' page. At the top, it displays 'Current Login: 0000supr Location: 0008-Springfield School District' and a 'State ID Home' button. Below this is a table with the following data:

Field Name	Field Value	Error
Claim Date		Claiming date is is invalid. Should be of the form MM/DD/YYYY.

An 'OK' button is located below the table.

## FUNCTIONS OVERVIEW

The main page is the starting point of the Uniq-ID application. Users can perform a desired function by clicking the appropriate link in the *Menu*.

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### UPLOAD BATCH FILE

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This feature allows a user to upload a Student Batch File and feed it into the eScholar Uniq-ID System for ID assignment.

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### ENTER INDIVIDUAL STUDENT

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

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### STUDENT SEARCH

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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 eScholar Uniq-ID System.

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### BATCH SEARCH

---

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

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### EXTRACT & DOWNLOAD BATCH

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

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







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## CLAIMING PROCESS

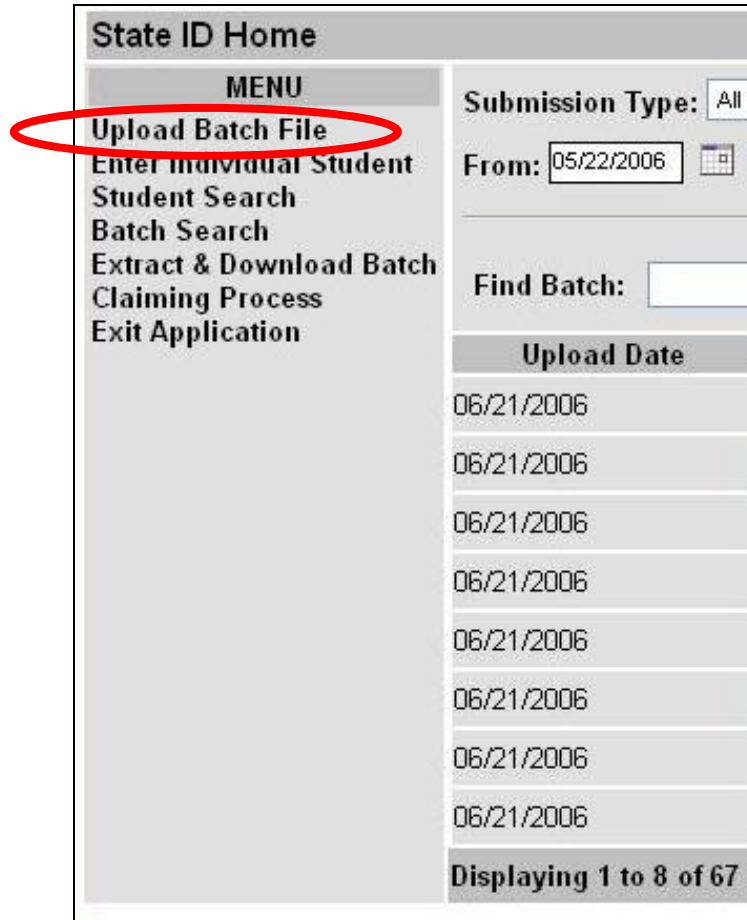
---

This module provides users the ability to handle situations when a student transfers from one public school to another within the state. It provides a mechanism for the schools involved to communicate with each other through automated emails in order to create and respond to claims for a transferring student.

## PROCESSING A BATCH FILE

### UPLOAD BATCH FILE

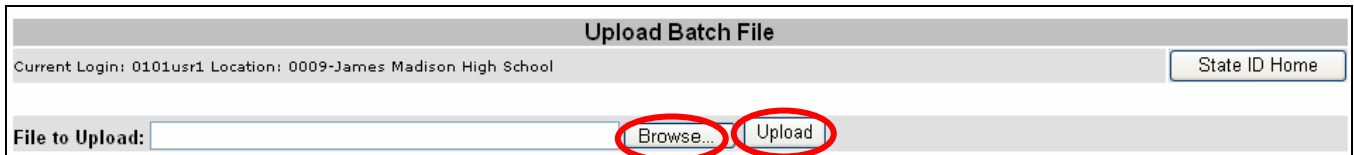
Users can submit Student Batch Files by clicking the **Upload Batch File** link in the *Menu*:



This feature will allow user to perform the following actions:

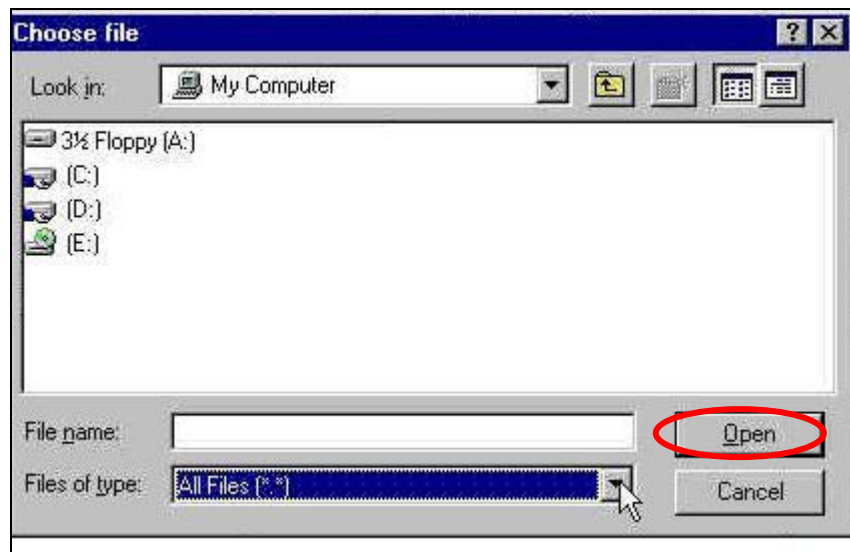
- Choose a Student Batch File from his/her local computer system
- Upload that file for ID Assignment

## UPLOADING A STUDENT BATCH FILE



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

1. The file must first be located on the local computer system in order to upload the file. Click **BROWSE** to see the local computer system's directory structure.
2. Browse through the directory structure and choose the directory/folder where the batch file is stored.



3. Select the correct file from your local system and click **OPEN**.
4. Click **UPLOAD** once the file path is in the **File to Upload** text box. This uploads the file to the Uniq-ID System server for subsequent processing.

If the system encounters any errors while attempting to upload the Student Batch File, it will provide the user with a page similar to the following:

Upload Batch File				
Current Login: 0009admn Location: 0009-Allentown School District				State ID Home
Upload Date	Batch Info	Status	Number of Records	Next Action
		<p><b>File Upload failed for the following reasons:</b>            Version is not valid.            Extract date is not valid.            Extract time is not valid.</p> <p>The header and trailer records in the uploaded file have different Transmission IDs.            Record(s) does not contain all fields on 1 line(s):            2</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 41</p> <p>Fix The Above Errors And Resubmit New File            Contact DE for Assistance.</p>		Upload New File

The application will display the reasons why the file failed to upload in the *Status* column. In addition, the file the user attempted to upload will be saved in the database and can be downloaded in the **Extract & Download Batch** module.



**NOTE:** The application will store all Student Batch Files rejected because of a fatal file error in the database. 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**.

## VALIDATING THE DATA

The following screen displays if the batch file upload is successful:

Upload Batch File				
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 Uploaded. Begin Validation Stage	12	Validate Data

The current status of the batch file

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

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			
Batch Statistics	Processing Info	Download Info	<u>General Info</u>
Batch Number	42		
Batch Type	Batch		
Batch Status	FILE UPLOAD COMPLETE		
District Code	0009		
School Code	0000		
Extract Date	03/10/2004		
Extract File	0009_0102_Elementary_School_3.txt		
Transmission ID	0071262136		
Creation User ID	0009admn		
Creation Date	06/13/2006		
Total Records	12		
Record Delimiter	0x09		
Header Delimiter	0x09		
File Version	1.0		

Close Window



**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.

Users can click **VALIDATE DATA** to proceed to the next step. This loads the records in the batch file from the Uniq-ID System application server to the staging database tables, where further validation checks are performed on the data.



**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.



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

After clicking **VALIDATE DATA**, a user will see a screen similar to the following:

**Student Identifier and Locator System**

---

**Validate Data**

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

Upload Date	Batch Info	Status	Number of Records	Next Action
07/13/2005	<input type="button" value="Batch Info"/>	Data Validation is in progress.	In Progress/1	Check for completion later.

Users can check if validation is complete by navigating to the application's main page and finding the batch at issue.



**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**.

## VERIFYING THE STATUS OF THE VALIDATION

If the batch file contained one or more records that failed validation, the main page will inform the user in the Status column of the main page:

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

**MENU**

- Upload Batch File
- Enter Individual Student
- Student Search
- Batch Search
- Extract & Download Batch
- Claiming Process
- Exit Application

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

From: 05/22/2006  To: 06/21/2006

Find Batch:

Upload Date	Batch Info	Status	Record Count	Next Action
06/21/2006	<input type="button" value="200"/>	Data Validation Incomplete. Fix Data Errors	3	<input type="button" value="Fix Errors"/>

Displaying 1 to 1 of 1

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. In addition, users can download a list of all records that contain errors in the **Extract & Download Batch** module.

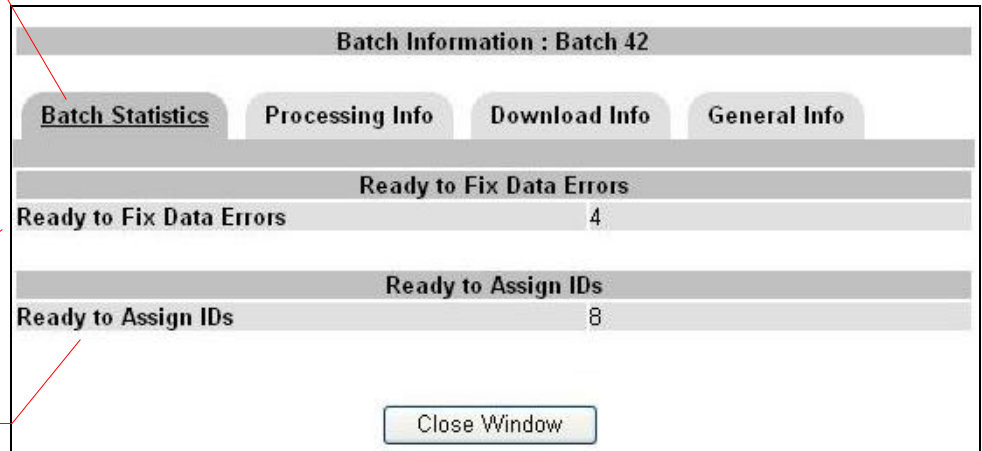


Click the button in the *Batch Info* column to display the status of the batch file and its records. This displays a pop-up window similar to the following:

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 D.

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>Ready to Fix Data Errors</b>	4
<b>Ready to Assign IDs</b>	8

Users can click **FIX ERRORS** to proceed to the next step.



**NOTE:** If no errors are found during the validation process, the system navigates to the ID assignment screen.



## VIEWING THE VALIDATION ERRORS

The next page will display all records in a batch that failed validation. Each record has hyperlinks and an **EDIT** button that enables you to choose the corresponding record to review and fix:

**Fix Errors**

Current Login: 0009admn 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"/>	<a href="#">DENNIS</a>	<a href="#">TRAVIS</a>				MALE	<a href="#">Edit</a>
<input type="checkbox"/>	<a href="#">EDWARDS</a>	<a href="#">HANNAH</a>	F		11/10/1994	FEMALE	<a href="#">Edit</a>
<input type="checkbox"/>	<a href="#">LEEPER</a>	<a href="#">SHENNA</a>	N		04/03/1988	FEMALE	<a href="#">Edit</a>
<input type="checkbox"/>	<a href="#">LEISTMAN</a>	<a href="#">ERIC</a>	J		04/22/1994	MALE	<a href="#">Edit</a>

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 State ID assignment.



**TIP:** The hyperlinks in the **Last Name** and **First Name** columns and the **EDIT** button all navigate to the Edit Student Record page.

Records from the above list can also be canceled. (The effect of canceling a record is discussed in more detail later in this manual). To cancel a record, users can check the box to the left of the record and then click the **CANCEL ALL CHECKED RECORDS** button. Multiple records can also be canceled by selecting more than one record on this page. Users can select all records on this page by selecting the **SELECT ALL IN PAGE** link. Users can also cancel all error records for the batch by clicking the **Cancel All Error Records For This Batch** button.



**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 the error records that would normally appear on other pages in the list.

## ADDRESSING THE VALIDATION ERRORS

The application will display the screen below if a user clicks the **EDIT** button or clicks on one of the hyperlinks in the **Last Name** or **First Name** columns:

**Fix Errors**

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

**Edit Student Record**

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

* First Name: TRAVIS	Middle Name:	* Last Name: DENNIS	Suffix:
* Gender: MALE	* Date Of Birth: <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">mm / dd / yyyy</span> <span style="color: red; font-size: small;">* Invalid: Required</span>	* Ethnicity: HISPANIC	* Sch. Code: 0102
* Res District: 0009	SSN: 123 - 22 - 2222	* Local Student ID: 103458687	* Grade: 08
* District: 0009	* School Year: 2004		

\* Required Fields
Update Student Record
Cancel Student Record
Back To Fix Error List
Records Remaining to Fix :4

**Original Validation Errors**

- Date Of Birth is not present

Displays the original validation error(s)

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

The application will notify the users of the data errors by displaying a message directly below the field. 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.

Users can follow these steps to fix the data error:

1. Change the fields marked as having data errors
2. Click the **Update Student Record** button.

The system will present the user will a confirmation page informing him/her that the record was successfully fixed:

**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

From the above page, users can return to the list of records with data errors by clicking **BACK TO FIX ERRORS LIST**. In addition, users can immediately navigate to the next record that has a data error by clicking the **NEXT ERROR RECORD** button.

**Fix Errors**

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

**Edit Student Record**

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

* First Name: TRAVIS	Middle Name:	* Last Name: DENNIS	Suffix:
* Gender: MALE	* Date Of Birth: mm / dd / yyyy <span style="color: red; font-size: small;">* Invalid: Required</span>	* Ethnicity: HISPANIC	* Sch. Code: 0102
* Res District: 0009	SSN: 123 - 22 - 2222	* Local Student ID: 103458687	* Grade: 08
* District: 0009	* School Year: 2004		

\* Required Fields
Update Student Record
Cancel Student Record
Back To Fix Error List
Records Remaining to Fix: 4

**Original Validation Errors**

- Date Of Birth is not present

From the *Fix Errors* page, users can return to the list of records with data errors by clicking **BACK TO FIX ERRORS LIST**. In addition, users can cancel the record by clicking the **CANCEL STUDENT RECORD** button. The system will mark that record as canceled and present the user with a confirmation page informing him/her of the same:

**Fix Errors**

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

**System Message**

**Student Record Canceled. No ID will be assigned.**

Back To Fix Error List
Next Error Record



**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.

Once all the records have been reviewed and fixed, the button on the confirmation page will change to **PROCEED TO ID ASSIGNMENT**.

**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 could be disabled.

## ASSIGNING STATE 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 display the status of the batch file and its records, users can click the button in the *Batch Info* column:

**Batch Information : Batch 42**

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

**Ready to Assign IDs**

Ready to Assign IDs	11
---------------------	----

**Canceled**

Canceled During Fix Errors Stage	1
----------------------------------	---

Represents the number of records in the batch file that are valid and that will be considered for ID assignment.

This displays the number of records that were canceled during the Fix Errors stage. These records will not be considered for ID assignment.



Users can start the process of assigning IDs by clicking the **ASSIGN STATE ID** button. When this process is initiated, the Uniq-ID System displays an intermediate page as follows:

Assign 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	ID Assignment is in progress.	In Progress	Check for completion later.

The status of ID assignment can be checked by going to the application's main page and navigating to the batch at issue.

The State ID System takes one of the following actions for each record in the file:

- If the system finds no matching student, it will assign a new State ID. These records do not need to be reviewed.
- 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.
- 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 will become the ID's current information and the information of the matching student will become part of that ID's history. 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**.



**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**.



## REVIEWING THE OUTCOME OF ID ASSIGNMENT

Upon completion of ID Assignment, the application displays the outcome of the process and guides you to the next action. If one or more Near Matches are encountered, the system will display a message stating the same in the *Status* column:

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

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

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

From: 05/22/2006 To: 06/21/2006

Find Batch:  Search

Upload Date	Batch Info	Status	Record Count	Next Action
06/20/2006	165	Near Matches / Duplicates Found	310	Resolve Near Matches
06/20/2006	140	Near Matches / Duplicates Found	977	Resolve Near Matches
06/20/2006	128	Near Matches / Duplicates Found	7	Resolve Near Matches
06/20/2006	106	Near Matches / Duplicates Found	2	Resolve Near Matches

Displaying 1 to 4 of 4 First Prev Next Last



**TIP:** If the application does not find any Near Matches, the Status for the batch will be "IDs Assigned" and the Next Action will be "Download State ID."

All Near Match records must be resolved before the user can continue to the next step in the ID Assignment process. In addition, users can download a list of all Near Match records in the **Extract & Download Batch** module.

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

**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

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/DUPLICATES

The screen below displays all records in a batch that need to be resolved because Near Matches have been found:

Resolve Near Matches / Duplicates									
Current Login: 0009admn Location: 0009-Allentown School District									State ID Home
<input type="checkbox"/> Select All In Page <input type="button" value="Cancel All Checked Records"/> <input type="button" value="Cancel All Near Match Records For This Batch"/>									
Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District Code	School Code	Res District Code	
<a href="#">FARMER</a>	<a href="#">SABRA</a>	RR		08/14/1990	FEMALE	0009	0101	0009	<input type="button" value="Review and Select"/>
<input type="checkbox"/>	<a href="#">MOOTZ</a>	MELANIE	QW	10/02/1994	FEMALE	0009	0101	0009	<input type="button" value="Review and Select"/>
<input type="checkbox"/>	<a href="#">VOSS</a>	BRANDON	QB	06/26/1991	MALE	0009	0101	0009	<input type="button" value="Review and Select"/>

Displaying 1 to 3 of 3



**TIP:** The hyperlinks in the **Last Name** and **First Name** columns and the **REVIEW AND SELECT** button all navigate to the Resolve Near Match page.

Records from the above list can also be canceled. To cancel a record, users can check the box to the left of the record and then click the **CANCEL ALL CHECKED RECORDS** button. Multiple records can also be canceled by selecting more than one record on this page. Select all records on this page by selecting the **SELECT ALL IN PAGE** link. Users can also cancel all error records for the batch by clicking the **Cancel All Near Match Records For This Batch** button.



**NOTE:** The list of Near Match records may span two or more pages. The **Cancel All Near Match Records for This Batch** button can be used to cancel the error records that would normally appear on other pages in the list.

If a user clicks the **REVIEW AND SELECT** button or one of the hyperlinks in the **Last Name** or **First Name** columns, the application will display the screen below. The top section displays the submitted student and the bottom section will display a list of matching students:

Resolve Near Matches / Duplicates									
Current Login: 0009admn Location: 0009-Allentown School District									State ID Home
Student Record to Review and Select									
Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District Code	School Code		
VOSS	BRANDON	QB		06/26/1991	MALE	0009	0101		
<input type="button" value="Assign Selected"/> <input type="button" value="Create New ID"/> <input type="button" value="Cancel Record"/> <input type="button" value="Select Another Record"/>									
Near Matches / Duplicates Found									
Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District Code	School Code	Match Probability	
<input type="radio"/>	<a href="#">VOSS</a>	BRANDON	WW	06/26/1991	MALE	0009	<a href="#">0101</a>	0.587 [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 bring a user to the **Compare Student Information** interface. That page will display both the record to be resolved along with the matching student's record in detail:

Compare Student Information									
Current Login: 0009admn Location: 0009-Allentown School District									State ID Home
<b>Student Record being reviewed.</b>									
<b>First Name:</b>	BRANDON	<b>Middle Name:</b>	<i>QB</i>	<b>Last Name:</b>	VOSS	<b>Suffix:</b>			
<b>District :</b>	0009 Allentown School District			<b>School :</b>	0101 James Madison High School				
<b>Gender:</b>	MALE	<b>Date Of Birth:</b>	06/26/1991	<b>Ethnicity:</b>	WHITE, NOT OF HISPANIC ORIGIN	<b>Sch. Yr:</b>	2005		
<b>Res. Dist:</b>	0009	<b>SSN</b>	<i>###-##-####</i>	<b>Local Student ID:</b>	106641963	<b>Grade:</b>	07		
<b>Created:</b>	06/13/2006	<b>Last Updated:</b>	06/13/2006	<b>Serial#:</b>	270	<b>State ID</b>	2468922492		
<b>Comments:</b>	2468922492;								
<b>Near Match/ Duplicate Student [ State ID: 246-892-2492 - 0.58760566 ]</b>									
<b>First Name:</b>	BRANDON	<b>Middle Name:</b>	<i>WW</i>	<b>Last Name:</b>	VOSS	<b>Suffix:</b>			
<b>District :</b>	0009 Allentown School District			<b>School :</b>	0101 James Madison High School				
<b>Gender:</b>	MALE	<b>Date Of Birth:</b>	06/26/1991	<b>Ethnicity:</b>	WHITE, NOT OF HISPANIC ORIGIN	<b>Sch. Yr:</b>	2005		
<b>Res. Dist:</b>	0009	<b>SSN</b>	<i>###-##-####</i>	<b>Local Student ID:</b>	106641963	<b>Grade:</b>	07		
<b>Created:</b>	06/01/2006	<b>Last Updated:</b>	06/13/2006	<b>Serial#:</b>	267	<b>State ID</b>	2468922492		
<b>Matching Note:</b>									
Return to List of Near Matches									
<b>Background shading and/or italicized text indicates that the values for that field differ between the two students.</b>									

The above page displays the submitted student at the top of the page and the matching student at the bottom of the page. Users can return to the previous page by clicking **RETURN TO LIST OF NEAR MATCHES**.



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

1. Values in the fields, if any, are italicized.
2. Background color for the fields are yellow.



**TIP:** With some implementations the **Social Security Number** field will display as an actual value and in other implementations that field will be masked (e.g., ###-##-####). Regardless, if social security number differs between the two students, the application will highlight that field with italics and render the background color yellow.



**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. For example, a Near Match with a match probability of 85% may appear reasonable at the time that it was created. However, if that matching student's date of birth and gender changes as a result of a different submission, the 85% match probability may not seem correct

The Uniq-ID System provides additional information to help users to resolve Near Matches. On the **Resolve Near Matches/Duplicates** interface, users can view information about the matching student's school by clicking the link in the **School Code** column:

Resolve Near Matches / Duplicates									
Current Login: 0009admn Location: 0009-Allentown School District								<a href="#">State ID Home</a>	
Student Record to Review and Select									
Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District Code	School Code		
VOSS	BRANDON	QB		06/26/1991	MALE	0009	0101		
<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									
<input type="radio"/>	Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District Code	School Code	Match Probability
<input type="radio"/>	<a href="#">VOSS</a>	<a href="#">BRANDON</a>	WW		06/26/1991	MALE	0009	<a href="#">0101</a>	0.587 [NEAR MATCH]

SCHOOL INFORMATION	
<b>District</b>	0009
<b>District Name</b>	Allentown School District
<b>School</b>	0101
<b>School Name</b>	James Madison High School
<b>Street</b>	Maddison St
<b>City</b>	Mock City
<b>State</b>	XL
<b>Zip</b>	10605
<b>Contact</b>	Mr. Principal
<b>Title</b>	Principal
<b>Phone</b>	(212)555-0000
<b>Fax</b>	(212)666-0000
<b>Email</b>	<a href="mailto:0101@0009.abc">0101@0009.abc</a>
<a href="#">Close Window</a>	

When a user is ready to resolve the Near Match, he/she can do so using the buttons on the **Resolve Near Matches/Duplicates** interface. The following options are available:



**Resolve Near Matches / Duplicates**

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

---

**Student Record to Review and Select**

Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District Code	School Code
VDSS	BRANDON	QB		06/26/1991	MALE	0009	0101

---

**Near Matches / Duplicates Found**

	Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District Code	School Code	Match Probability
<input type="radio"/>	VDSS	BRANDON	WWW		06/26/1991	MALE	0009	0101	0.587 [NEAR MATCH]

1. If the student under review is the same as one of the matching students, the user can select the matching student using the radio buttons to the left and then click **ASSIGN SELECTED**.
2. If the student under review is different from any of the matching students, the user can click **CREATE NEW ID**.
3. If the user wishes to cancel the record under review, he/she can do so with the **CANCEL RECORD** button.
4. Users can also navigate back to the list of Near Matches by clicking **SELECT ANOTHER RECORD**.



**NOTE:** With some implementations, the **Assign Selected**, **Create New ID** or **Cancel Record** buttons could be disabled.

Once all records are resolved, the next step in the process is **DOWNLOAD STATE ID**.

## DOWNLOADING STATE IDS

Upon completion of Near Match resolution, the application displays the status of the batch as follows:

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

**MENU**

- Upload Batch File
- Enter Individual Student
- Student Search
- Batch Search
- Extract & Download Batch
- Claiming Process
- Exit Application

Submission Type: All

Processing Stage: Download State ID

Sort: Upload Date Desc

From: 05/22/2006 To: 06/19/2006

Find Batch:

Upload Date	Batch Info	Status	Record Count	Next Action
06/19/2006	58	IDs Assigned	98	Download State ID
06/19/2006	53	IDs Assigned	9816	Download State ID

Displaying 25 to 26 of 26 First Prev Next Last

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**

Batch Statistics
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
----------------------------------	---

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.

Users can download the records that completed ID Assignment by clicking the **DOWNLOAD STATE ID** button. This will bring up the following interface:

**Download ID**

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

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

Users can 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.



**NOTE:** The *IDs Assigned* file contains the State IDs for those students in the Student Batch File for whom an ID was assigned. The file can be used to update a user's Student Information System.

The format of the *IDs Assigned* file will be exactly the same as the Student Batch File and each student record will contain the State ID that was assigned to that student.



**Note:** This completes the processing of a batch file for creating and downloading State IDs.





Below is the screen that is used for entering student information online:

Enter Individual Student					
Current Login: 0009admn Location: 0009-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:	mm / dd / yyyy	* Ethnicity:	<input type="text"/>
* Res District:	<input type="text"/>	SSN:	<input type="text"/>	* Local Student ID:	<input type="text"/>
* District:	<input type="text"/>	* School Year:	<input type="text"/>	State ID:	<input type="text"/>
* Required Fields <input type="button" value="Assign State ID"/> <input type="button" value="Clear"/>					

Red asterisks note which fields are required.



**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 Uniq-ID System.

Users can enter information for a student in the above page. All required fields must be entered. The **CLEAR** button will refresh the page and remove all values from all fields. After entering in the student's information, users can click **ASSIGN STATE ID**.

The application will validate all the data entered by the user. If one or more data errors are found, the application will return a page similar to the following:

Enter Individual Student					
Current Login: 0009admn Location: 0009-Allentown School District					State ID Home
System Message					
The student information has not been updated. Validation errors.					
Student Data Entry					
* First Name:	Joe	Middle Name:	<input type="text"/>	* Last Name:	Student
Suffix:	<input type="text"/>				
* Gender:	<input type="text"/>	* Date Of Birth:	03 / 03 / 1993	* Ethnicity:	WHITE, NOT OF HISPANIC ORIGIN
* Res District:	0009	SSN:	111 - 11 - 1111	* Local Student ID:	32424a
* District:	0009	* School Year:	2006	State ID:	<input type="text"/>
* Required Fields <input type="button" value="Assign State ID"/> <input type="button" value="Clear"/>					

The application will notify the users of the data errors by displaying a message directly below the field.

The Uniq-ID System takes the student record through all the stages of the ID Assignment Process, similar to the processing of a Student Batch File. If the student record encounters any Near Matches, the application will display the relevant screen for resolution during the ID assignment process.



**NOTE:** The State ID System implements the same set of procedures, business rules, and processing for a record entered online as with a batch record. The application creates a virtual batch for every record entered online. However, that batch contains only the one record that was entered by the user.

The interface below is the screen that displays after a successful online ID assignment:

Assign ID				
Current Login: 0009admin Location: 0009-Allentown School District				State ID Home
Upload Date	Batch Info	Status	Record Count	Next Action
06/14/2006	43	ID Assigned. New ID Created for the Student is 353-089-6713. Click <a href="#">here</a> to download records.	1	Enter Another Student

Displays the student's **State ID**.

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

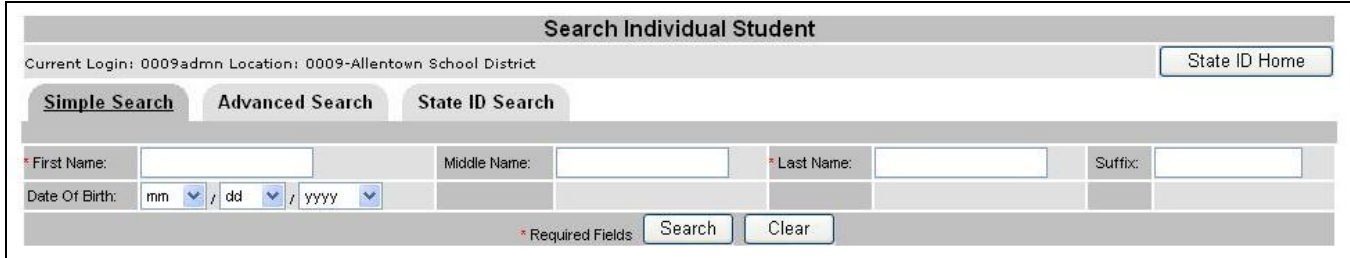
This message indicates that there is only one record in the batch and that the **State ID** was created without encountering any Near Matches or duplicates.

Users can obtain the assigned ID from the **Status** column manually or download the same as a file (similar to a normal batch file) by clicking the link in that same column.





The first page of **Student Search** will look like the following:



**Search Individual Student**

Current Login: 0009admn Location: 0009-Allentown School District [State ID Home](#)

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

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

Date Of Birth: mm / dd / yyyy

\* Required Fields

This module allows for three types of searches:

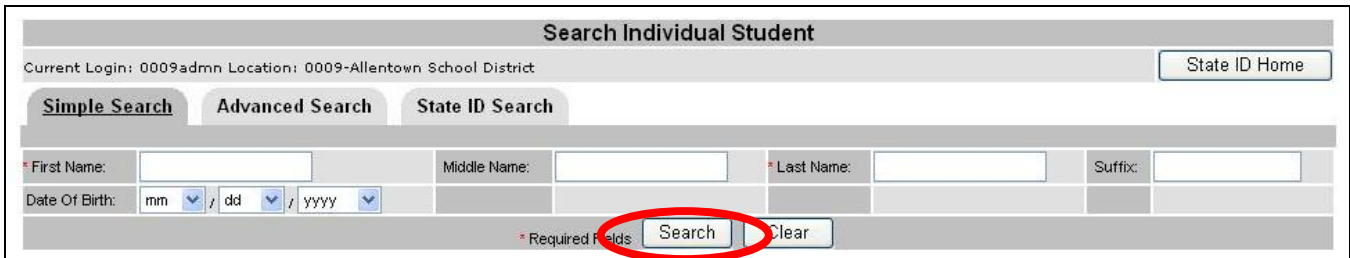
- *Simple Search* allows users to find students using basic demographics
- *Advanced Search* allows users to find students using any Uniq-ID System field
- *State ID Search* allows users to find students using a State ID



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

## SIMPLE SEARCH

The **Simple Search** interface looks like the following:



**Search Individual Student**

Current Login: 0009admn Location: 0009-Allentown School District [State ID Home](#)

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

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

Date Of Birth: mm / dd / yyyy

\* Required Fields

Users can find students by entering in information in the fields provided and clicking **SEARCH**.

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

If no matches are found, the system displays feedback confirming the same. 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 Individual Student**

Current Login: 0009admn Location: 0009-Allentown School District [State ID Home](#)

[Simple Search](#)   [Advanced Search](#)   [State ID Search](#)

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

Date Of Birth: mm  / dd  / yyyy

\* Required Fields     

---

**Search Results**

Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	Match Probability
<a href="#">MOOTZ</a>	<a href="#">MELANIE</a>	R		10/02/1994	FEMALE	0.985 [MATCH]



**NOTE:** *There is an application-level setting that allows clients to change the type of search users can perform. One type is a Matching Engine Search that uses the Uniq-ID 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 see more detailed information about a student, users can click the hyperlink in the **Last Name** or the **First Name** column. Upon doing so, the application will display the **Student Information** page:

**Search Individual Student**

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

**Student Information [127-509-4902]**

First Name: CURTIS	Middle Name:	Last Name: RODOLPH	Suffix:
School: 0009-0101 James Madison High School	Res. Dist: 0009	Local Student ID: 110506307	Grade: 04
Gender: MALE	Date Of Birth: 03/27/1996	Ethnicity: HISPANIC	Sch. Yr: 2005
Created: 06/01/2006	Last Updated: 06/08/2006	Update Ref #: <a href="#">219</a>	Last Batch#: 28

---

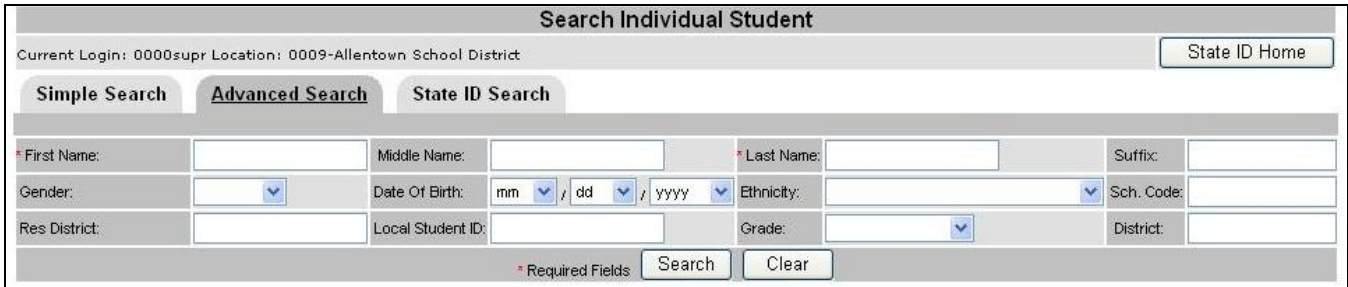
**History Information**

History Date	Last Name	First Name	Middle Name	Suffix	Gender	Date Of Birth	Race/Ethnicity	District	School
<a href="#">06/08/2006</a>	RODOLPH	CURTIS			MALE	03/27/1996	HISPANIC	0009	0101
<a href="#">06/08/2006</a>	RODOLPH	CURTIS			MALE	03/27/1996	HISPANIC	0009	0101

The above page will display the student's current information in the top section and the history information in the bottom section. Users can view information about the submission that created the current or any of the history records by clicking the link in the **Update Ref #** field or the **History Date** column.

## ADVANCED SEARCH

The **Advanced Search** interface looks like the following:



The screenshot shows the "Search Individual Student" interface. At the top, it displays the current login and location: "Current Login: 0000supr Location: 0009-Allentown School District". There is a "State ID Home" button in the top right. Below this are three tabs: "Simple Search", "Advanced Search" (which is selected), and "State ID Search". The main search area contains several fields:
 

- \* First Name: [text input]
- Middle Name: [text input]
- \* Last Name: [text input]
- Suffix: [text input]
- Gender: [dropdown menu]
- Date Of Birth: [mm] [dd] [yyyy] (with dropdowns for each)
- Ethnicity: [dropdown menu]
- Sch. Code: [text input]
- Res District: [text input]
- Local Student ID: [text input]
- Grade: [dropdown menu]
- District: [text input]

 At the bottom of the form, there is a "\* Required Fields" label, a "Search" button, and a "Clear" button.

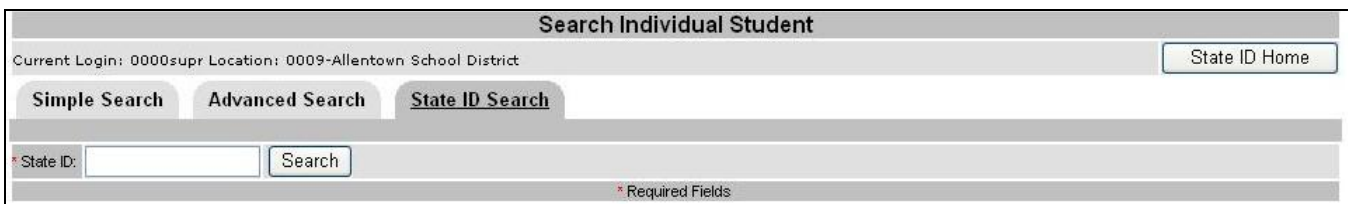
The feature works primarily the same way as **Simple Search** except the user has more fields in which to work with.



**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. When 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.*

## STATE ID SEARCH

The **State ID Search** interface looks like the following:



The screenshot shows the "Search Individual Student" interface with the "State ID Search" tab selected. It displays the same login and location information as the previous screenshot. The search area is simplified, featuring only one field:
 

- \* State ID: [text input]

 Below the field is a "Search" button. At the bottom of the form, there is a "\* Required Fields" label.

Users can find students by entering in the State ID in the field provided and clicking **SEARCH**. When one or more students are found, the application displays the matching records at the bottom of the page:

**Search Individual Student**

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

Simple Search
Advanced Search
State ID Search

\* State ID:

\* Required Fields

Search Results						
Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	Match Probability
RODOLPH	CURTIS			03/27/1996	MALE	

The remainder of this feature works primarily the same way as **Simple Search**.

## EDIT 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). Below is the **Student Information** page within the **Student Search** module:

**Search Individual Student**

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

**Student Information [127-509-4902]**

First Name:	CURTIS	Middle Name:		Last Name:	RODOLPH	Suffix:	
School:	0009-0101 James Madison High School	Res. Dist:	0009	Local Student ID:	110506307	Grade:	04
Gender:	MALE	Date Of Birth:	03/27/1996	Ethnicity:	HISPANIC	Sch. Yr:	2005
Created:	06/01/2006	Last Updated:	06/08/2006	Update Ref #:	<a href="#">219</a>	Last Batch#:	28

Edit Student
Back To Search Results

**History Information**

History Date	Last Name	First Name	Middle Name	Suffix	Gender	Date Of Birth	Race/Ethnicity	District	School
<a href="#">06/08/2006</a>	RODOLPH	CURTIS			MALE	03/27/1996	HISPANIC	0009	0101
<a href="#">06/08/2006</a>	RODOLPH	CURTIS			MALE	03/27/1996	HISPANIC	0009	0101

The above screen will display and enable the **EDIT STUDENT** button if:

- The user has the rights to edit students. An administrator can give a user role the rights to edits 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.





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

If the **EDIT STUDENT** button is enabled and a user clicks it, the application will navigate to the **Edit Student** page:

Edit Student					
Current Login: 0000supr Location: 0009-Allentown School District					State ID Home
Student Information					
* First Name:	MELANIE	Middle Name:	R	* Last Name:	MOOTZ
* Gender:	FEMALE	* Date Of Birth:	10 / 02 / 1994	Ethnicity:	WHITE, NOT OF HISPANIC ORIGIN
* Res District:	0009	SSN:	### ## ####	* Local Student ID:	110406667
District:	0009	* School Year:	2005	State ID:	4562205644
* Required Fields			Update Student Record	Back To Search Results	

From the above screen, users can change any of the student's information except **School Code** or **District Code**. Users can follow these steps to update the student:

- Change the values in the fields you want to edit
- Click **UPDATE STUDENT RECORD**



**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.

The application will validate any changes made to the student's information. If a value entered by the user is an invalid one, the system will display the following screen:

Edit Student					
Current Login: 0000supr Location: 0009-Allentown School District					State ID Home
System Message					
The student information has not been updated. Validation errors.					
Student Information					
* First Name:	MELANIE	Middle Name:	R	* Last Name:	MOOTZ
* Gender:	FEMALE	* Date Of Birth:	mm / dd / yyyy * Invalid: Invalid Date	* Ethnicity:	WHITE, NOT OF HISPANIC ORIGIN
* Res District:	0009	SSN:	### ## ####	* Local Student ID:	110406667
District:	0009	* School Year:	2005	State ID:	4562205644
* Required Fields		Update Student Record		Back To Search Results	

If the user's changes pass validation, the application will update the student record and display the screen below:

Edit Student					
Current Login: 0000supr Location: 0009-Allentown School District					State ID Home
System Message					
The student record has been updated. Batch:44. You can download this information using Extract & Download.					
Student Information					
* First Name:	MELANIE	Middle Name:	R	* Last Name:	MOOTZ
* Gender:	FEMALE	* Date Of Birth:	02 / 06 / 1983	* Ethnicity:	WHITE, NOT OF HISPANIC ORIGIN
* Res District:	0009	SSN:	### ## ####	* Local Student ID:	110406667
District:	0009	* School Year:	2005	State ID:	4562205644
* Required Fields		Update Student Record		Back To Search Results	

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.

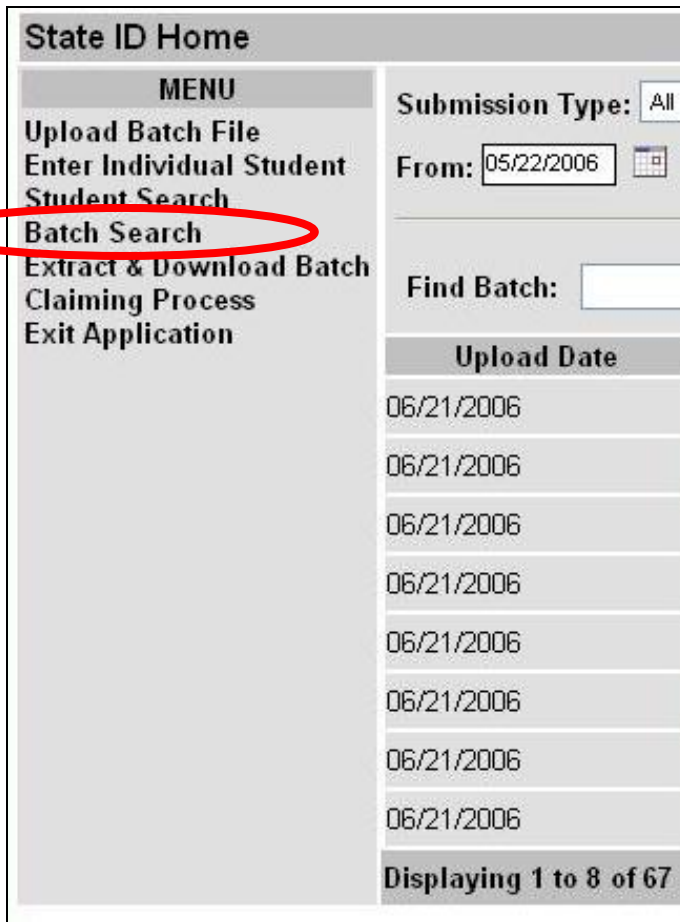


**NOTE:** The number for the batch that the system creates will display on the screen above.

## SEARCHING FOR STUDENTS WITH A BATCH FILE

### BATCH SEARCH

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



Upload Date
06/21/2006
06/21/2006
06/21/2006
06/21/2006
06/21/2006
06/21/2006
06/21/2006
06/21/2006
06/21/2006

This module allows users to search for students using a Student Batch File. Batch Searches can be conducted in the same manner as uploading batch files for ID Assignment.



**NOTE:** Some implementations may disable batch searching for certain or all users. In such an instance, the **Batch Search** 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 a State ID. Searching for a student's history information (e.g., previous school code) may not return desired results.

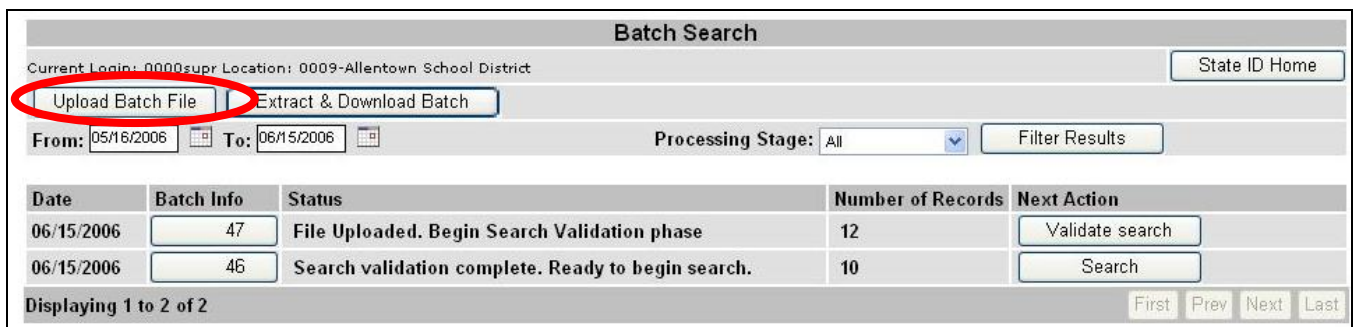


## SEARCHING FOR STUDENTS WITH A BATCH FILE

Batch searching requires that a user upload a file containing students that they want to search for. Below is a list of the steps for this type of search:

- Batch file upload
- Data validation
- Perform search
- Download *IDs Found* file

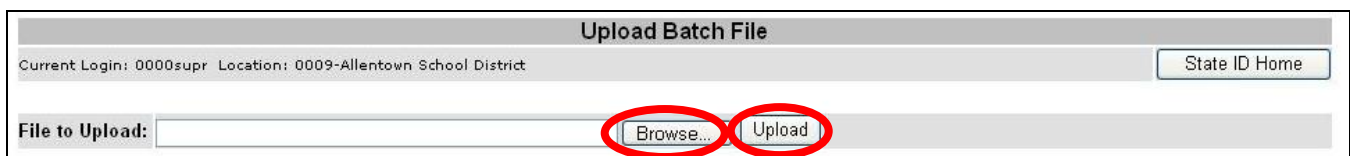
Below is the initial **Batch Search** interface:



Date	Batch Info	Status	Number of Records	Next Action
06/15/2006	47	File Uploaded. Begin Search Validation phase	12	Validate search
06/15/2006	46	Search validation complete. Ready to begin search.	10	Search

From the above page, users can upload a file for searching, download batch search-related files (e.g., *IDs Found* file) and view previous batch searches.

Upon clicking **UPLOAD BATCH FILE**, a user can browser their local system and upload a file for batch searching:



**NOTE:** *The files to be used for batch searching are in the same format as the normal Student Batch File used for ID assignment.*

Any fatal file errors encountered during upload are communicated to the user.

Upload Batch File			
Current Login: 0000supr Location: 0009-Allentown School District			State ID Home
Upload Date	Batch Info	Status	Next Action
		<b>File Upload failed for the following reasons:</b> Extract date is not valid.  <b>Fix The Above Errors And Resubmit New File</b> Contact DE for Assistance.	<input type="button" value="Upload 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.

If the application successfully uploads a file for batch searching, the system navigates back to the initial page of the module. The batch search file can be found in the list at the bottom of the page:

Batch Search				
Current Login: 0000supr Location: 0009-Allentown School District			State ID Home	
<input type="button" value="Upload Batch File"/>		<input type="button" value="Extract &amp; Download Batch"/>		
From:	05/16/2006	To:	06/15/2006	Processing Stage: All <input type="button" value="Filter Results"/>
Date	Batch Info	Status	Number of Records	Next Action
06/15/2006	47	File Uploaded. Begin Search Validation phase	12	<input type="button" value="Validate search"/>
06/15/2006	46	Search validation complete. Ready to begin search.	10	<input type="button" value="Search"/>
Displaying 1 to 2 of 2				<input type="button" value="First"/> <input type="button" value="Prev"/> <input type="button" value="Next"/> <input type="button" value="Last"/>



**NOTE:** This list is ordered from most recent to oldest batch. Therefore, the batch currently being worked on is most likely to be the first one on the list.

Users can begin the process of validating the data in the batch search file by clicking **VALIDATE SEARCH**. 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.



**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.

When validation is complete, the application again navigates back to the module's initial page. The results of validation can be viewed by reviewing the batch information:

**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
06/15/2006	47	Search validation complete. Ready to begin search.	11	<input type="button" value="Search"/>
06/15/2006	46	Search validation complete. Ready to begin search.	10	<input type="button" value="Search"/>

Displaying 1 to 2 of 2

**Batch Information : Batch 47**

**Search**

Ready to Search IDs	11
Canceled During Data Validation Stage - Search	1

This section indicates the current status of all records in the batch. In this example, 11 records passed validation and one record was canceled because it contained at least one data error.

Users can click **SEARCH** to continue the batch search process.



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

The application will find one of the following for each record in a batch:

- No matching students
- A single matching student
- Multiple matching students
- One or more near matching students

When the search completes, the application navigates back to the module's initial page. Results of the search can be reviewed by viewing batch information:

**Batch Search**

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

From: 05/16/2006 To: 06/15/2006
 Processing Stage: All

Date	Batch Info	Status	Number of Records	Next Action
06/15/2006	47	Download Search results	10	Download
06/15/2006	46	Search validation complete. Ready to begin search.	10	Search

Displaying 1 to 2 of 2 First Prev Next Last

**Batch Information : Batch 51**

**Search**

No Matching Record Found - Search	1
Canceled During ID Search Stage - Multiple Records Found	1
Matching Record Found - Search	8
Canceled During Data Validation Stage - Search	2

This section indicates the current status of all records in the batch. In this example, one record found no matching students, one record was canceled during the search because multiple matches were found, eight records found a single matching student, and two records were canceled during data validation.

Users can click **DOWNLOAD** in the **Next Action** column to download the *IDs Found* file. Click the link in the **Status** column to download the file containing the search results.

Download ID				
Current Login: 0000supr Location: 0009-Allentown School District				State ID Home
Upload Date	Batch Info	Status	Record Count	Next Action
06/15/2006	51	File Extract Complete. Click <a href="#">here</a> to download the file.	9	Return To Search Home

The *IDs Found* file will contain the following:

- Records where no matching student was found. The **State ID** column will be blank for these types of records.
- Records where a single matching student was found. The **State ID** column will contain the State ID of the matching student for these types of records.



**NOTE:** During a search, the eScholar Uniq-ID 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. Please see **Downloading Search Result Files** at the end of this section for further instructions.

## DOWNLOADING SEARCH RESULT FILES

Users can click **EXTRACT & DOWNLOAD BATCH** from within the **Batch Search** module to begin downloading search result files.

Batch Search				
Current Login: 0000supr Location: 0009-Allentown School District				State ID Home
Upload Batch File		Extract & Download Batch		
From: 05/16/2006	To: 06/15/2006	Processing Stage: All	Filter Results	
Date	Batch Info	Status	Number of Records	Next Action
06/15/2006	47	Download Search results	10	Download
06/15/2006	46	Search validation complete. Ready to begin search.	10	Search
Displaying 1 to 2 of 2				First Prev Next Last

Three types of search result files are available:

- IDs Found File
- Records Canceled During Searching
- Rejected files



The following page displays a list of search result files that are available for download:

**Extract & Download Batch**

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

**Submission Type:** Search **Extract Type:** IDs Found - Search **Sort:** Upload Date Desc Filter Results

**From:** 05/16/2006 **To:** 06/15/2006

View Download Cart

Upload Date	Batch Info	Status	Record Count	Next Action
06/15/2006	51	IDs Found - Search	9	Extract Records
06/15/2006	50	IDs Found - Search	10	Extract Records
06/15/2006	49	IDs Found - Search	10	Extract Records
06/15/2006	48	IDs Found - Search	9	Extract Records
06/15/2006	47	IDs Found - Search	10	Extract Records
06/15/2006	46	IDs Found - Search	10	Extract Records

Displaying 1 to 6 of 6 First Prev Next Last

Users can filter the above list by the following:

- *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*

To filter the list, users can change one of the above and then click **FILTER RESULTS**.

Users can download a file for a single batch by clicking **EXTRACT RECORDS** or combine multiple files together by using the **Download Cart** feature. For more information on using the **Download Cart** please refer to the *Extract & Download Batch* section of this document.



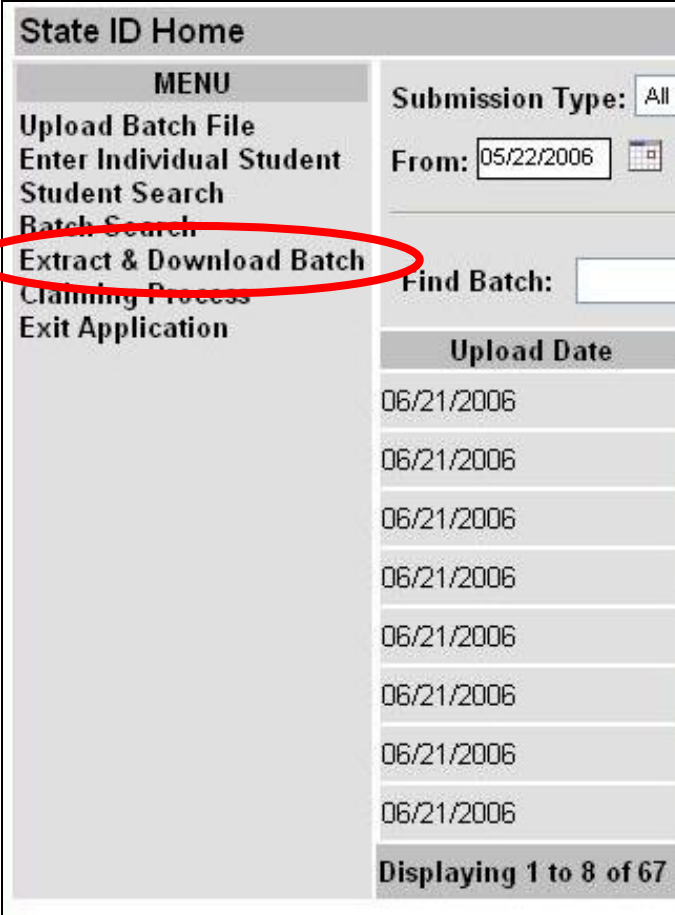
**NOTE:** As IDs for a given search batch are downloaded, the download dates and times and the user who downloaded the file are captured in the database. In addition, that information displays in the **Batch Information** pop-up for each search batch in the **Download Info** tab.



## DOWNLOADING OUTPUT BATCH FILES

### EXTRACT & DOWNLOAD BATCH

Users can download files related to the Uniq-ID System by clicking the **Extract & Download Batch** link in the *Menu*:



State ID Home	
MENU	
Upload Batch File	Submission Type: All
Enter Individual Student	From: 05/22/2006
Student Search	Find Batch: <input type="text"/>
Batch Search	
<b>Extract &amp; Download Batch</b>	
Claiming Process	
Exit Application	
Upload Date	
06/21/2006	
06/21/2006	
06/21/2006	
06/21/2006	
06/21/2006	
06/21/2006	
06/21/2006	
06/21/2006	
Displaying 1 to 8 of 67	

This module allows users to download files related to their work within the Uniq-ID System.



**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/Duplicates to Resolve*
- *Canceled Records*
- *Rejected Files*
- *Fixed Records*



**NOTE:** For complete descriptions of the above files, please refer to Appendix B of this document.

Below is the initial page for the **Extract & Download Batch** module:

**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:** 05/15/2006 **To:** 06/15/2006

[View Download Cart](#)

Upload Date	Batch Info	Status	Record Count	Next Action
06/15/2006	51	IDs Found - Search	9	Extract Records <span style="float: right;"><a href="#">Add To Download Cart</a></span>
06/15/2006	50	IDs Found - Search	10	Extract Records <span style="float: right;"><a href="#">Add To Download Cart</a></span>
06/15/2006	49	IDs Found - Search	10	Extract Records <span style="float: right;"><a href="#">Add To Download Cart</a></span>
06/15/2006	48	IDs Found - Search	9	Extract Records <span style="float: right;"><a href="#">Add To Download Cart</a></span>
06/15/2006	47	IDs Found - Search	10	Extract Records <span style="float: right;"><a href="#">Add To Download Cart</a></span>
06/15/2006	46	IDs Found - Search	10	Extract Records <span style="float: right;"><a href="#">Add To Download Cart</a></span>

Displaying 1 to 6 of 6 [First](#) [Prev](#) [Next](#) [Last](#)

Users can filter the above list by the following:

- *Submission Type:* The options are **All**, **File**, **Online**, **SLF** or **Edit**.
- *Extract Type:* The options are **IDs Assigned**, **Errors to Fix**, **Near Matches**, **Canceled**, **Rejected**, or **Fixed Records**.
- *Sort:* Users can sort by **Upload Date** or **Batch Number**
- *Batch Upload Date*

To filter the list, users can change one of the above and then click **FILTER RESULTS**. Users can also get details about the submission the download is for by clicking the button in the **Batch Info** column.

## DOWNLOADING A FILE FOR A SINGLE SUBMISSION

Users can download a single extract file by clicking the **EXTRACT RECORDS** button:

**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: 05/16/2006 To: 06/15/2006

View Download Cart

Upload Date	Batch Info	Status	Record Count	Next Action
06/15/2006	51	IDs Found - Search	9	Extract Records
06/15/2006	50	IDs Found - Search	10	Extract Records
06/15/2006	49	IDs Found - Search	10	Extract Records
06/15/2006	48	IDs Found - Search	9	Extract Records
06/15/2006	47	IDs Found - Search	10	Extract Records
06/15/2006	46	IDs Found - Search	10	Extract Records

Displaying 1 to 6 of 6 First Prev Next Last

After selecting the batch to download, the **Extract & Download** screen similar to the following displays:

**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.

Users can click the link in the **Status** section to download the file.

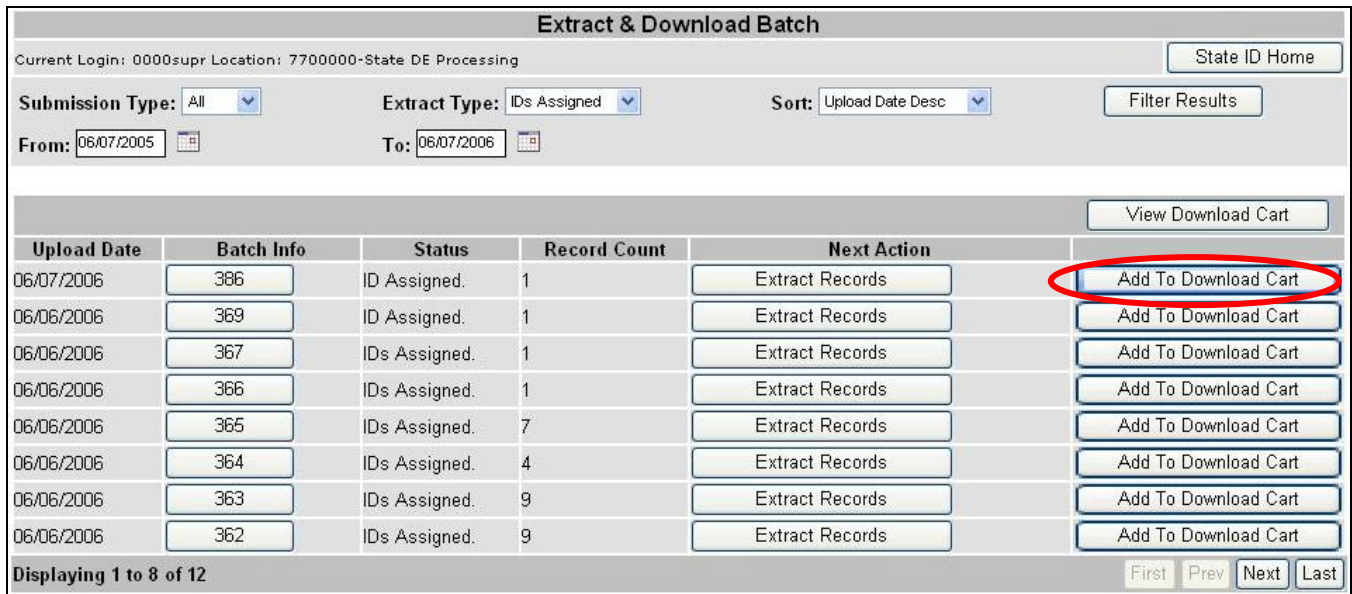
Once downloaded and opened in a text editor, the contents of the file are similar to the following:

```

sid_13_0009_0101_High_School_20050309_110158_ide_id[1].txt - Notepad
File Edit Format View Help
ITH 03/09/2005 11:01:58 0071262134 1.0 delimiter=0x09
ID 0101 0009 FARMER SABRA L F 08/14/1990 UK 106632359 106632359 H 7242697441 0009 2004
ID 0101 0009 VOSS BRANDON M 06/26/1992 07 106641963 106641963 W 1781992185 0009 2004
ID 0101 0009 LEONARD NICHOLAS P F 10/16/1999 01 110397063 110397063 W 5098019508 0009 2004
ID 0101 0009 MOOTZ MELANIE R F 10/02/1994 05 110406667 110406667 W 8319355737 0009 2004
ID 0101 0009 WOOD DOROTHY F 03/04/1993 07 110418271 110418271 W 9447215068 0009 2004
ID 0101 0009 BATTIS TIFFANY N F 02/09/1998 02 110427075 110427075 B 2418206394 0009 2004
ID 0101 0009 ADEPEGBA ZAHIR M 12/11/1989 10 110448283 110448283 H 5328743903 0009 2004
ID 0101 0009 MORIARITY MICHAEL D M 09/22/1997 02 110466691 110466691 W 4117391488 0009 2004
ID 0101 0009 TRAVERS KEITH M 06/18/1992 08 110496703 110496703 W 1399846876 0009 2004
ID 0101 0009 RODOLPH CURTIS M 03/27/1996 04 110506307 110506307 H 1936997827 0009 2004
ID 0101 0009 MOOTZ MELANIE R F 10/02/1994 05 110406667 110406667 W 7810604848 0009 2004
TT 0071262134 13
  
```

## DOWNLOADING A FILE FOR MULTIPLE SUBMISSIONS

Users can easily download Uniq-ID files across submissions. Below is a screenshot from the initial page of **Extract & Download Batch**:



Current Login: 0000supr Location: 7700000-State DE Processing State ID Home

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

From: 06/07/2005 To: 06/07/2006

Upload Date	Batch Info	Status	Record Count	Next Action
06/07/2006	386	ID Assigned.	1	Extract Records <span style="float: right; border: 1px solid red; border-radius: 50%; padding: 2px;">Add To Download Cart</span>
06/06/2006	369	ID Assigned.	1	Extract Records <span style="float: right;">Add To Download Cart</span>
06/06/2006	367	IDs Assigned.	1	Extract Records <span style="float: right;">Add To Download Cart</span>
06/06/2006	366	IDs Assigned.	1	Extract Records <span style="float: right;">Add To Download Cart</span>
06/06/2006	365	IDs Assigned.	7	Extract Records <span style="float: right;">Add To Download Cart</span>
06/06/2006	364	IDs Assigned.	4	Extract Records <span style="float: right;">Add To Download Cart</span>
06/06/2006	363	IDs Assigned.	9	Extract Records <span style="float: right;">Add To Download Cart</span>
06/06/2006	362	IDs Assigned.	9	Extract Records <span style="float: right;">Add To Download Cart</span>

Displaying 1 to 8 of 12 First Prev Next Last

The **ADD TO DOWNLOAD CART** button allows users to download files across multiple submissions. Clicking that button will bring a user to the Download Cart interface:

Each row in the list represents a different ID Assignment submission

Download Cart				
Current Login: 0000supr Location: 7700000-State DE Processing				State ID Home
Download Cart - IDs Assigned Extract Type				
	Upload Date	Batch Number		Record Count
<input type="checkbox"/>	06/07/2006	386		1
				1 : Total Records
Download Cart		Back To Extract & Download		Remove Selected Batches From Cart
				Clear Download Cart

The above page will display all the submissions that are in the Download Cart. In addition, users can:

- Download all the records in the cart using the **DOWNLOAD CART** button.
- Return to the main page of **Extract & Download Batch** using the **BACK TO EXTRACT & DOWNLOAD** button.
- Remove submissions from the cart using the checkboxes next to each submission and the **REMOVE SELECTED BATCHES FROM CART** button.
- Clear the cart using the **CLEAR DOWNLOAD CART** button.

Downloading the cart will bring the user to the download page mentioned above:

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



**NOTE:** If a user is attempting to download records for two or more submissions, the **Batch Info** pop-up will not be available.



The **Extract & Download Batch** main page also contains a **VIEW DOWNLOAD CART** button:

**Extract & Download Batch**

Current Login: 0000supr Location: 7700000-State DE Processing State ID Home

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

From: 06/07/2005  To: 06/07/2006

Upload Date	Batch Info	Status	Record Count	Next Action	View Download Cart
06/07/2006	386	ID Assigned.	1	<input type="button" value="Extract Records"/>	<input type="button" value="Add To Download Cart"/>
06/06/2006	369	ID Assigned.	1	<input type="button" value="Extract Records"/>	<input type="button" value="Add To Download Cart"/>
06/06/2006	367	IDs Assigned.	1	<input type="button" value="Extract Records"/>	<input type="button" value="Add To Download Cart"/>
06/06/2006	366	IDs Assigned.	1	<input type="button" value="Extract Records"/>	<input type="button" value="Add To Download Cart"/>
06/06/2006	365	IDs Assigned.	7	<input type="button" value="Extract Records"/>	<input type="button" value="Add To Download Cart"/>
06/06/2006	364	IDs Assigned.	4	<input type="button" value="Extract Records"/>	<input type="button" value="Add To Download Cart"/>
06/06/2006	363	IDs Assigned.	9	<input type="button" value="Extract Records"/>	<input type="button" value="Add To Download Cart"/>
06/06/2006	362	IDs Assigned.	9	<input type="button" value="Extract Records"/>	<input type="button" value="Add To Download Cart"/>

Displaying 1 to 8 of 12

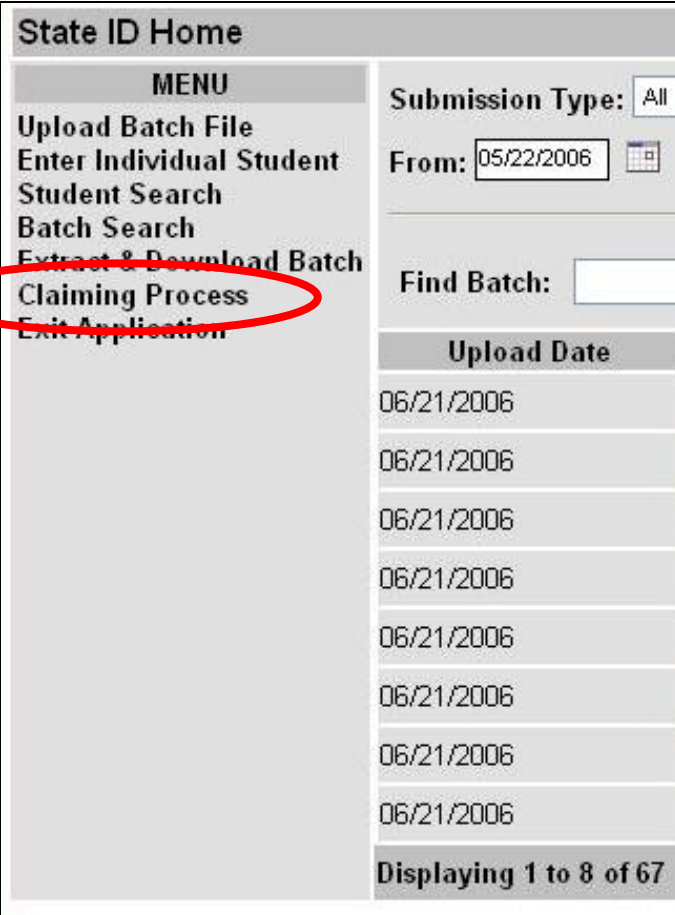
Clicking that button will bring the user to the Download Cart page mentioned above.



## CREATING AND RESPONDING TO A CLAIM FOR A TRANSFERRING STUDENT

### CLAIMING PROCESS

Users can create and respond to claims for a transferring student by clicking the **Claiming Process** link in the *Menu*:



State ID Home

MENU	Submission Type:
Upload Batch File	All
Enter Individual Student	From: 05/22/2006
Student Search	
Batch Search	
Extract & Download Batch	Find Batch: <input type="text"/>
<b>Claiming Process</b>	
Exit Application	

Upload Date
06/21/2006
06/21/2006
06/21/2006
06/21/2006
06/21/2006
06/21/2006
06/21/2006
06/21/2006
06/21/2006
06/21/2006

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This module is designed to handle situations when a student transfers from one public school to another within the state. It provides a mechanism for the Gaining and Losing Schools to communicate with each other via automated emails in order to create and respond to claims for a transferring student.



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

In this module, users can:

- Claim a transferring student
- Respond to a claim
- Search for a claim
- Delete a claim
- Resend a claim-related email
- Download a claim-related extract file

## CREATING A CLAIM

When a user first enters the Claiming Process module, the following interface displays:

**Claiming Process**

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

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

From: 05/16/2006 
 To: 06/15/2006 
 School: All Schools 
 Sort: Claim Date Desc

Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status/Action
06/12/2006	1	6400474552	Petterson, John	John Kennedy High School(0008-0201)	James Madison High School(0009-0101)	<input type="button" value="Details"/>

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Users can click **CREATE NEW CLAIM** to begin creating a new claim. A page used to enter the student's State ID displays:

**Create A New Claim**

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

**Search For Student To Be Claimed**

State ID:



**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.*

Once a user enters a State ID and clicks **SEARCH**, a page displays with all the details needed in order to create a claim:

Create A New Claim					
Current Login: 0000supr Location: 0009-Allentown School District					State ID Home
Student Information [456-220-5644]					
First Name:	MELANIE	Middle Name:	R	Last Name:	MOOTZ
School:	0009-0101 James Madison High School	Res. Dist:	0009	Local Student ID:	110406667
Gender:	FEMALE	Date Of Birth:	01/06/1983	Ethnicity:	WHITE, NOT OF HISPANIC ORIGIN
Created:	06/01/2006	Last Updated:	06/15/2006	Update Ref #:	273
				Last Batch#:	25
New Claim Entry					
Gaining School			Losing School		
District:	Allentown School District (0009)		District:	Allentown School District (0009)	
* School:	Select A School		School:	James Madison High School (0101)	
* Grade Level:	05		Grade Level:	05	
* Claim Date:	06/15/2006		Response Date:		
* Email:			* Email:	0101@0009.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			Create Claim		Return to Claims List

A user can follow these steps to create a claim:

1. Confirm the student's information.
2. Select the Gaining School's name.
3. Select the student's current grade level.
4. Select the Gaining School's email address. In some cases, this value will be pre-populated. In other cases, the **...** button can be used to look-up email addresses.
5. Comments may be entered. These comments display in the body of the email that is sent to the Losing School.
6. Click **Create Claim**.



**NOTE:** The dropdown list of school names contains only those schools to which a user has access. For example, for a district level user, all schools in that district display.



Users can lookup email addresses using the **...** button. Upon doing so, the following pop-up window displays:



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.

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.

After a user clicks **Create Claim**, the system will display the *Claim Creation Confirmation* screen. This interface 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:

**Claim A New Claim**

Current Login: 0000supr Location: 0008-Springfield School District State ID Home

**System Message**

Claim Created. E-mail has been sent.

Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status/Action
06/15/2006	<a href="#">2</a>	<a href="#">4562205644</a>	MOOTZ, MELANIE	James Madison High School( <a href="#">0009-0101</a> )	Thomas Jefferson Elementary School( <a href="#">0008-0202</a> )	<a href="#">Details</a>

[Return to Claims List](#)

## DELETING A CLAIM

At any time before the Losing School responds to a claim, the Gaining School can delete a claim:

Claiming Process						
Current Login: 0000supr Location: 0008-Springfield School District						State ID Home
Create A New Claim		Search Individual Claim		Extract & Download		Resend Email
Claim Type: All	Claim Status: All	Student Status: Active		Filter Results		
From: 05/16/2006	To: 06/15/2006	School: All Schools		Sort: Claim Date Desc		
Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status/Action
06/15/2006	2	4562205644	MOOTZ, MELANIE	James Madison High School(0009-0101)	Thomas Jefferson Elementary School(0008-0201)	Details
06/12/2006	1	6400474552	Petterson, John	John Kennedy High School(0008-0201)	James Madison High School(0009-0101)	Respond
Displaying 1 to 2 of 2						First Prev Next Last

If a user clicks **Details**, the system displays the *Claim Details* interface. They can click **DELETE CLAIM** to delete a claim or **RETURN TO CLAIMS LIST** to navigate back to the previous page:

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
					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

After deleting the claim, the application displays a claim ID deletion confirmation page and an email is automatically sent to the Losing School notifying them that the claim was deleted.



## RESPONDING TO A CLAIM

Once a claim is created, the State ID System automatically sends an email to the Losing School. The email informs the school that one of their former students is being claimed by another school. The Losing School then has to respond to or confirm the validity of the claim. To do so, they can log into the State ID System and navigate to the **Claiming Process** module.

When a user initially enters the **Claiming Process** module, the application displays a list of claims at the bottom of the page. That list contains claims in which their school/district is either 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.

If the school/district needs to respond to any claims, there is a **Respond** button in the list's **Status/Next Action** column:

**Claiming Process**

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

Claim Type: All 
 Claim Status: All
 Student Status: Active
 From: 05/20/2006 To: 06/19/2006
 School: All Schools Sort: Claim Date Desc

Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status/Action
06/15/2006	2	<a href="#">4562205644</a>	MOOTZ, MELANIE	James Madison High School( <a href="#">0009-0101</a> )	Thomas Jefferson Elementary School( <a href="#">0008-0102</a> )	<b>Respond</b>
06/12/2006	1	<a href="#">6400474552</a>	Petterson, John	John Kennedy High School( <a href="#">0008-0201</a> )	James Madison High School( <a href="#">0009-0101</a> )	Deleted

Displaying 1 to 2 of 2 First Prev Next Last

Users can click **RESPOND** to respond to the claim. The **Respond to A Claim** page displays:

Claim Details					
Current Login: 0000supr Location: 0009-Allentown School District					State ID Home
Student Information [456-220-5644]					
First Name:	MELANIE	Middle Name:	R	Last Name:	MOOTZ
School:	0009-0101 James Madison High School	Res. Dist:	0009	Local Student ID:	110406667
Gender:	FEMALE	Date Of Birth:	01/06/1983	Ethnicity:	WHITE, NOT OF HISPANIC ORIGIN
Created:	06/01/2006	Last Updated:	06/15/2006	Update Ref #:	<a href="#">273</a>
Suffix:		Grade:	05	Sch. Yr:	2005
				Last Batch#:	25
Claim Information [Claim ID : 2]					
Gaining School			Losing School		
District:	Allentown School District (0008)		District:	Allentown School District (0009)	
School:	Thomas Jefferson Elementary School (0202)		School:	James Madison High School (0101)	
Grade Level:	05		Grade Level:	05	
Claim Date:	06/15/2006		* Response Date:	06/19/2006	
Email:	0202@0008.abc		* Email:	0101@0009.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			<input type="button" value="Accept Claim"/> <input type="button" value="Dispute Claim"/> <input type="button" value="Return to Claims List"/>		

The above interface contains all the information needed to enable someone from the Losing School to make a determination as to whether or not to **Accept** or **Dispute** a claim. If the claim is accepted, the application automatically updates the student's school and district code to reflect that the student has transferred. That is, the student's school and district of record is set to the gaining school/district. However, if the claim is disputed, an email is sent to the Gaining School stating that the losing school has disputed the claim. The Losing School can enter text in the Comments section that is placed in the body of the email that is sent to the Gaining School.

Regardless if the claim is accepted or rejected, the application displays a confirmation page similar to the page below:

Claim Details						
Current Login: 0000supr Location: 0009-Allentown School District						State ID Home
System Message						
<input type="button" value="Claim Closed."/>						
Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status/Action
06/15/2006	<a href="#">2</a>	<a href="#">4562205644</a>	MOOTZ, MELANIE	James Madison High School( <a href="#">0009-0101</a> )	Thomas Jefferson Elementary School( <a href="#">0008-0202</a> )	<input type="button" value="Details"/>
<input type="button" value="Return to Claims List"/>						

## SEARCHING FOR A CLAIM

The Claiming Process module also provides the ability to search for a claim. Click **SEARCH INDIVIDUAL CLAIM** from the module's main page to start:

**Claiming Process**

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

Claim Type: 
 Claim Status: 
 Student Status:

From: 
 To: 
 School: 
 Sort:

Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status/Action
06/15/2006	<a href="#">2</a>	<a href="#">4562205644</a>	MOOTZ, MELANIE	James Madison High School( <a href="#">0009-0101</a> )	Thomas Jefferson Elementary School( <a href="#">0008-0202</a> )	<input type="button" value="Respond"/>
06/12/2006	<a href="#">1</a>	<a href="#">6400474552</a>	Petterson, John	John Kennedy High School( <a href="#">0008-0201</a> )	James Madison High School( <a href="#">0009-0101</a> )	Deleted

Displaying 1 to 2 of 2

Users can enter either the transferring student's **Claim ID** or **State ID** to initiate a search:

**Search Individual Claim**

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

**Search Using 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.

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:

State ID:

Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status/Action
06/15/2006	<a href="#">2</a>	<a href="#">4562205644</a>	MOOTZ, MELANIE	James Madison High School( <a href="#">0009-0101</a> )	Thomas Jefferson Elementary School( <a href="#">0008-0202</a> )	<input style="border: 2px solid red;" type="button" value="Details"/>

The button in the **Status/Action** column will change depending on the status of the claim (similar to the module's main page). For example, if the user searches for a pending claim for which they are from the Losing School, the button will be **RESPOND**.

Users can click the button in the last column to obtain additional information on a particular claim and also perform an action on the claim (e.g., delete or respond to a claim):

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
				Last Batch#:	33
Claim Information [Claim ID : 3 ]					
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:	06/19/2006		* 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	

Users can also click **RETURN TO CLAIMS LIST** to return to the module's main page.

## RESENDING A CLAIM-RELATED EMAIL

The **Claiming Process** module allows you 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.

Users can click **RESEND E-MAIL** from the module's main page to resend an email:



**Claiming Process**

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

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

From: 05/20/2006 
 To: 06/19/2006 
 School: All Schools 
 Sort: Claim Date Desc

Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status/Action
06/15/2006	<a href="#">2</a>	<a href="#">4562205644</a>	MOOTZ, MELANIE	James Madison High School(0009-0101)	Thomas Jefferson Elementary School(0008-0202)	<input type="button" value="Respond"/>
06/12/2006	<a href="#">1</a>	<a href="#">6400474552</a>	Petterson, John	John Kennedy High School(0008-0201)	James Madison High School(0009-0101)	Deleted

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Users can enter a **Claim ID** and click **SEARCH** on the next page:

**Resend E-mail**

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

**Search Claim To Resend Email**

Claim ID:

The next interface lists all the details about a particular claim. Click **SEND EMAIL** to resend the most recent email for that claim.

**Resend E-mail**

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

**Student Information [640-047-4552]**

First Name: John	Middle Name:	Last Name: Petterson	Suffix:
School: 0008-0201 John Kennedy High School	Res. Dist: 0008	Local Student ID: 213213a	Grade: 10
Gender: MALE	Date Of Birth: 01/01/1992	Ethnicity: WHITE, NOT OF HISPANIC ORIGIN	Sch. Yr: 2006
Created: 06/07/2006	Last Updated: 06/07/2006	Update Ref #: <a href="#">237</a>	Last Batch#: 33

**Resend Email for Claimed claim [ Claim ID : 3 ]**

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:	06/19/2006	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)	

**Claim Status: Claimed**  
**Claim Status: Sent**  
 Email Option:  Copy Mail to Sender

An email resend confirmation page displays if an email is resent.



**NOTE:** The Uniq-ID 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.

## DOWNLOADING CLAIM-RELATED FILES

The **Claiming Process** module allows users to download the following claim-related files:

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

Users can click **EXTRACT & DOWNLOAD** from the module's main page:

**Claiming Process**

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

Claim Type: 
 Claim Status: 
 Student Status:

From: 
 To: 
 School: 
 Sort:

Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status/Action
06/15/2006	<a href="#">2</a>	<a href="#">4562205644</a>	MOOTZ, MELANIE	James Madison High School(0009-0101)	Thomas Jefferson Elementary School(0008-0202)	<input type="button" value="Respond"/>
06/12/2006	<a href="#">1</a>	<a href="#">6400474552</a>	Petterson, John	John Kennedy High School(0008-0201)	James Madison High School(0009-0101)	Deleted

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Users can download claim-related files from the page below:



**Extract & Download Batch**

Current Login: 0000supr Location: 0008-Springfield School District State ID Home

**Submission Type:** All **Extract Type:** Accepted Claims **Sort:** Upload Date Desc Filter Results

**From:** 05/20/2004 **To:** 06/19/2007

View Download Cart

Upload Date	Batch Info	Status	Record Count	Next Action
06/15/2006	52	Accepted Claims	1	Extract Records <span style="float: right; border: 1px solid gray; padding: 2px;">Add To Download Cart</span>

Displaying 1 to 1 of 1 First Prev Next Last

Users can filter the above list 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.

To filter the list, users can change one of the above and then click **FILTER RESULTS**. Users can also get details about the batch the download is for by clicking the button in the **Batch Info** column.



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



**NOTE:** The actual downloading of the claim-related files is exactly the same as the process in the **Extract & Download Batch** module. Please see that module's section in this document for instructions on downloading.

## VIEWING PREVIOUS CLAIMS

The **Claiming Process** main page allows users to view and work on previous claims in which that user's school/district is the Gaining School or Losing School. The list of claims will appear in a list at the bottom of the page

**Claiming Process**

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

Claim Type: 
 Claim Status: 
 Student Status:

From: 
 To: 
 School: 
 Sort:

Claim Date	Claim ID	State ID	Student Name	Losing School	Gaining School	Status/Action
06/15/2006	<a href="#">2</a>	<a href="#">4562205644</a>	MOOTZ, MELANIE	James Madison High School(0009-0101)	Thomas Jefferson Elementary School(0008-0202)	<input type="button" value="Respond"/>
06/12/2006	<a href="#">1</a>	<a href="#">6400474552</a>	Petterson, John	John Kennedy High School(0008-0201)	James Madison High School(0009-0101)	Deleted

Displaying 1 to 2 of 2

Users can change the claims that appear in the above list by using the numerous filters in the middle of the page:

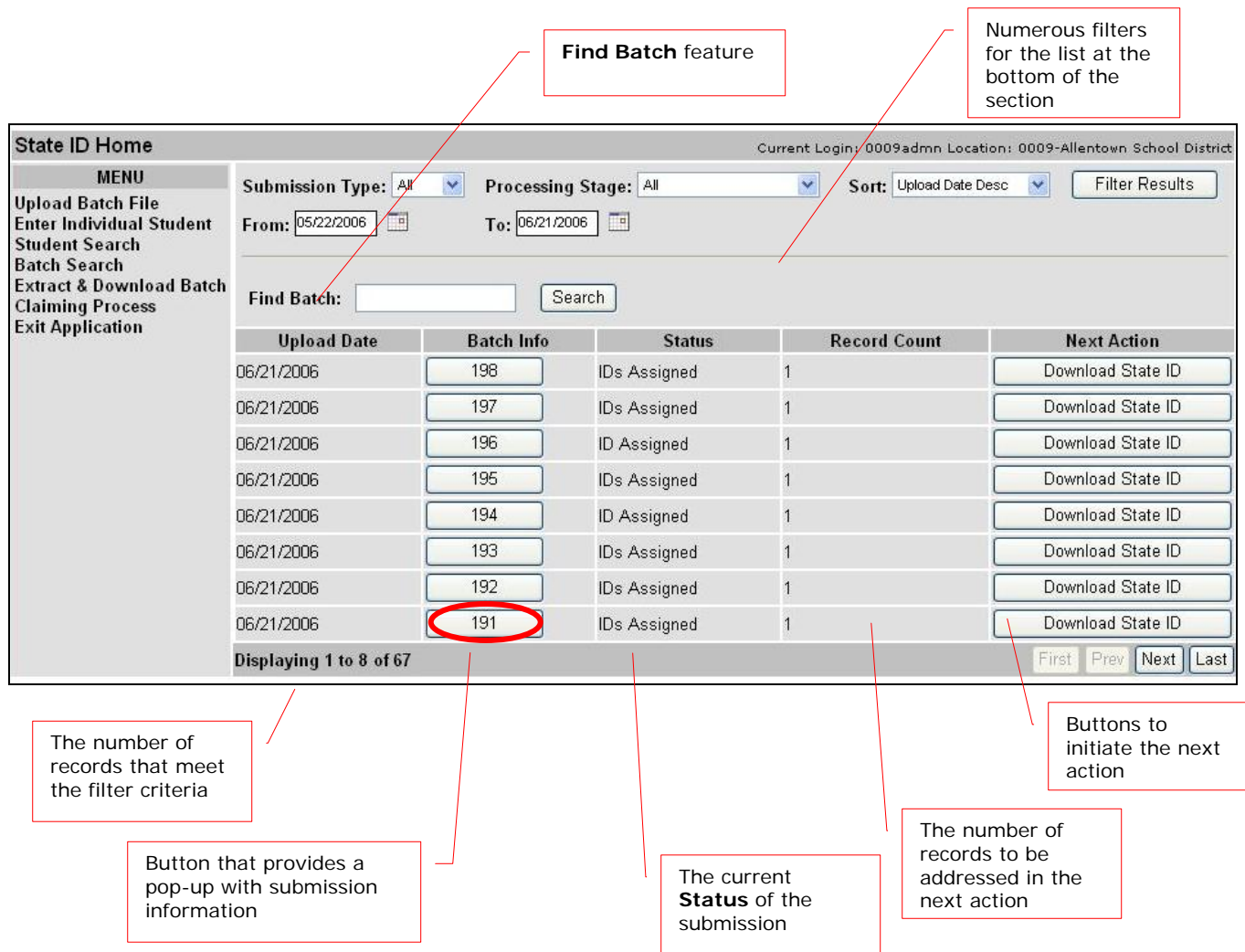
- *Claim Type:* The options are **All**, **Auto Claim**, or **Manual Claim**.
- *Claim Status:* The options are **All**, **Claimed**, **Responded**, or **Deleted**.
- *Student Status:* The options are **Active** or **Retired**.
- *Sort:* Users can sort by **Claim Date**, **Claim ID**, **State ID**, **Last Name**, or **Claim Status**.
- *School:* The dropdown list will contain all the schools that the user has access to.
- *Claim Date*

To filter the list, users can change one of the above and then click **FILTER RESULTS**. Users can also get details about the batch the download is for by clicking the button in the **Batch Info** column.

## WORKING WITH PREVIOUS SUBMISSIONS

### VIEW/CONTINUE PROCESSING PREVIOUS SUBMISSIONS

The main page is the first screen that displays when logging into the State ID System. The right section of that page will contain all the previous submissions that a user has access to. This allows users to begin working exactly where they left off the last time they were in the system:



**Find Batch feature**

Numerous filters for the list at the bottom of the section

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

**MENU**

- Upload Batch File
- Enter Individual Student
- Student Search
- Batch Search
- Extract & Download Batch
- Claiming Process
- Exit Application

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

From: 05/22/2006 To: 06/21/2006

Find Batch:  Search

Upload Date	Batch Info	Status	Record Count	Next Action
06/21/2006	198	IDs Assigned	1	Download State ID
06/21/2006	197	IDs Assigned	1	Download State ID
06/21/2006	196	ID Assigned	1	Download State ID
06/21/2006	195	IDs Assigned	1	Download State ID
06/21/2006	194	ID Assigned	1	Download State ID
06/21/2006	193	IDs Assigned	1	Download State ID
06/21/2006	192	IDs Assigned	1	Download State ID
06/21/2006	191	IDs Assigned	1	Download State ID

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The number of records that meet the filter criteria

Button that provides a pop-up with submission information

The current Status of the submission

The number of records to be addressed in the next action

Buttons to initiate the next action

## SIMPLE FILTERS

Users can change the submissions that appear in the above list by using the numerous filters at the top of the page:

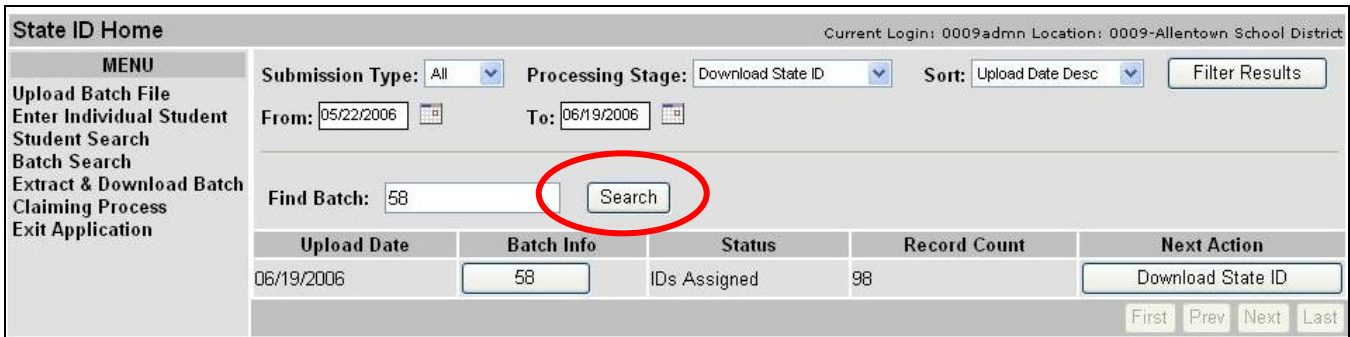
- *Submission Type:* The options are **All**, **File**, **Online**, **SLF**, or **Edit**.
- *Processing Stage:* The options are **All**, **Validate Data**, **Fix Errors**, **Assign State ID**, **Resolve Near Matches**, **Download State ID**, **Canceled**, **Validation in Progress**, **Assignment in Progress**,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

To filter the list, users can change one of the above and then click **FILTER RESULTS**.

## FIND BATCH FEATURE

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.

Users can enter a batch number in the **Find Batch** field and click **SEARCH**. If the application finds the batch and it is one the user has rights to work with, it will appear in the list:



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

**MENU**  
 Upload Batch File  
 Enter Individual Student  
 Student Search  
 Batch Search  
 Extract & Download Batch  
 Claiming Process  
 Exit Application

Submission Type: All Processing Stage: Download State ID Sort: Upload Date Desc

From: 05/22/2006 To: 06/19/2006

Find Batch: 58

Upload Date	Batch Info	Status	Record Count	Next Action
06/19/2006	58	IDs Assigned	98	<input type="button" value="Download State ID"/>

If the application cannot find the batch the user specifies, they will be given proper feedback:

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

**MENU**  
 Upload Batch File  
 Enter Individual Student  
 Student Search  
 Batch Search  
 Extract & Download Batch  
 Claiming Process  
 Exit Application

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

From: 05/22/2006 To: 06/21/2006

Find Batch: 22222

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 it, they will be given proper feedback:

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

**MENU**  
 Upload Batch File  
 Enter Individual Student  
 Student Search  
 Batch Search  
 Extract & Download Batch  
 Claiming Process  
 Exit Application

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

From: 05/22/2006 To: 06/21/2006

Find Batch: 9

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 the user is searching for is for a district that is other than the user's current district and the user has access to that other district, the application will display the following:

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

**MENU**  
 Upload Batch File  
 Enter Individual Student  
 Student Search  
 Batch Search  
 Extract & Download Batch  
 Claiming Process  
 Exit Application

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

From: 05/22/2006 To: 06/21/2006

Find Batch: 176

Upload Date	Batch Info	Status	Record Count	Next Action
Click <a href="#">here</a> to change your current district to: (0008 - Springfield School District) and go to batch:176				

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 he/she was searching for.



## APPENDIX A - ERROR & INFORMATIONAL MESSAGES

The following is a list of error messages that may be encountered while working in the eScholar Uniq-ID System™. There are two types of errors: fatal file error and data errors. Fatal file errors prevent a Student Batch File from being uploaded. If the application encounters a data error, the Student Batch File can be uploaded unless the maximum number of allowable data errors has been exceeded.

Message	Description	Error Type
The filename for the uploaded file has already been used for this district. Districts cannot submit files having the same <b>Name, Extract Date, and Extract Time</b> more than once.	The purpose of this error is to protect against the uploading of a duplicate file. If the file has not already been uploaded, the user can rename the file and try again.	Fatal File Error
The uploaded file does not appear to be for this application.	The uploaded file is in such a state that the application cannot process it whatsoever.	Fatal File Error
The header record in the uploaded file is not valid.	The header record is in such a state that the application cannot process it whatsoever.	Fatal File Error
The header record in the uploaded file is missing at least one field.	The header record must contain all fields.	Fatal File Error
The header record in the uploaded file is missing a <b>Transmission ID</b> .	<b>Transmission ID</b> is a required field.	Fatal File Error
The trailer record in the uploaded file is missing a <b>Transmission ID</b> .	<b>Transmission ID</b> is a required field.	Fatal File Error
The uploaded file has too many records. The maximum number of allowable records in any one file is XXX.	There is a limit to the total number of records a Student Batch File may have and that limit was exceeded. The file should be limited to less than or equal to the limit and resubmit.	Fatal File Error
The uploaded file has too many data errors to proceed. The maximum number of allowable data errors in any one file is XXX.	There is a limit to the total number of data errors a Student Batch File may have and that limit was exceeded. When this error is encountered, the application provides feedback in reference to the line numbers on which the errors occurred and the errors themselves.	Fatal File Error
At least one detail record in the uploaded file is missing the <b>Record Type</b> field.	<b>Record Type</b> is a required field.	Fatal File Error





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Message	Description	Error Type
The trailer record in the uploaded file is missing at least one field.	The trailer record must contain all fields.	Fatal File Error
The trailer record in the uploaded file is not valid.	The trailer record is in such a state that the application cannot process it whatsoever.	Fatal File Error
The header and trailer records in the uploaded file have different <b>Transmission IDs</b> .	The <b>Transmission ID</b> in the header and trailer must match.	Fatal File Error
The uploaded file does not contain a header record.	The <b>Student Batch File</b> must contain a header record.	Fatal File Error
The uploaded file does not contain a trailer record.	The <b>Student Batch File</b> must contain a trailer record.	Fatal File Error
The record count in the trailer record of the uploaded file is incorrect.	The record count must equal the total number of records in the file, including the header and trailer.	Fatal File Error
<b>First Name</b> is not present	Each detail record must contain a value in <b>First Name</b> .	Data Error
<b>Last Name</b> is not present	Each detail record must contain a value in <b>Last Name</b> .	Data Error
<b>Date Of Birth</b> is not present	Each detail record must contain a value in <b>Date of Birth</b> .	Data Error
<b>Date Of Birth</b> is not valid	The value in <b>Date of Birth</b> is in an incorrect format. The format must be MM/DD/YYYY.	Data Error
<b>Gender</b> is not present	Each detail record must contain a value in <b>Gender</b> .	Data Error
<b>Gender</b> is not valid	The value in <b>Gender</b> is not a state-defined gender.	Data Error
<b>Race/Ethnic Code</b> is not present	Each detail record must contain a value in <b>Race/Ethnic Code</b> .	Data Error
<b>Race/Ethnic Code</b> is not valid	The value in <b>Race/Ethnic Code</b> is not a state-defined race/ethnic code.	Data Error
<b>Local Student ID</b> is not present	Each detail record must contain a value in <b>Local Student ID</b> .	Data Error
<b>Grade Level</b> is not present	Each detail record must contain a value in <b>Grade Level</b> .	Data Error
<b>Grade Level</b> is not valid	The value in <b>Grade Level</b> is not a state-defined grade level.	Data Error
<b>Residential District</b> is not present	Each detail record must contain a value in <b>Residential District</b> .	Data Error
<b>Residential District</b> is not valid	The value in <b>Residential District</b> is not a state-defined residential district.	Data Error
<b>School Code</b> is not valid for the specified district	The value in <b>School Code</b> is not a school within the specified district code.	Data Error
<b>School Code</b> is not present	Each detail record must contain a value in <b>School Code</b> .	Data Error
<b>SSN</b> is not valid	<b>Social Security Number</b> may not a required field but, if provided, it must contain non-numeric characters and must be nine characters in length.	Data Error

Message	Description	Error Type
State ID System is busy. Try again later.	The application has reached its limit with respect to the number of batch submissions it may process at one time. You should attempt to process your batch submission at a later time.	Other
Invalid File Name	The filename of the Student Batch File can contain upper and lower case alphanumeric characters, periods, underscores, or hyphens. Spaces and any other special characters are not allowed.	Fatal File Error
<b>State Student ID</b> is invalid	The value in the <b>State ID</b> field is in a valid format but is not an ID assigned to any student in the state. This error only displays for online submissions. If this error is encountered during a batch submission, the system auto-cancels the record.	Data Error
<b>District Number</b> is not present	Each detail record must contain a <b>District Number</b> value.	Data Error
<b>District Number</b> is not valid	The value in <b>District Number</b> is not a state-defined <b>District Number</b> .	Data Error
<b>School Year</b> is not present	Each detail record must contain a <b>School Year</b> value.	Data Error
<b>School Year</b> is not valid	The <b>School Year</b> value is contains an incorrect format. Format must be YYYY.	Data Error
<b>Version</b> is not valid.	The <b>Version</b> value in the header record is not valid.	Fatal File Error
<b>First Name</b> is not valid.	The value in <b>First Name</b> has too many characters. <b>First Name</b> must be 60 characters or less in length.	Data Error
<b>Last Name</b> is not valid.	The value in <b>Last Name</b> has too many characters. <b>Last Name</b> must be 60 characters or less in length.	Data Error
<b>Middle Name</b> is not valid.	The value in <b>Middle Name</b> has too many characters. <b>Middle Name</b> must be 60 characters or less in length.	Data Error
<b>Name Suffix</b> is not valid.	The value in <b>Name Suffix</b> field has too many characters. <b>Name Suffix</b> must be ten characters or less in length.	Data Error
<b>Local Student ID</b> is not valid.	The value in the <b>Local Student ID</b> field has too many characters. <b>Local Student ID</b> must be 20 characters or less in length.	Data Error
<b>Delimiter</b> is not valid.	The value in the <b>Delimiter</b> of the uploaded file is not valid.	Fatal File Error
<b>Extract Date</b> is not valid.	The value in the <b>Extract Date</b> of the uploaded file is not valid. Format must be MM/DD/YYYY.	Fatal File Error
<b>Extract Time</b> is not valid.	The value in the <b>Extract Time</b> of the uploaded file is not valid. Format must be HH:MM:SS.	Fatal File Error

## APPENDIX B - INPUT AND OUTPUT FILES

The Uniq-ID System accepts two types of files and outputs thirteen types of files. The file types fall into three categories:

Seven files for ID Assignment:

- Input **Student Batch File**
- Output **IDs Assigned** file
- Output **Errors to Fix** file
- Output **Near Matches/Duplicates to Resolve** file
- Output **Canceled Records** file
- Output **Rejected** file
- Output **Fixed Records** file

Four files for the Claiming Process:

- Output **Accepted Claims** file
- Output **Disputed Claims** file
- Output **Deleted Claims** file
- Output **Pending Claims** file

Four files for Batch Search:

- Input **Student Batch File - Search**
- Output **IDs Found - Search** file
- Output **Canceled - Search** file
- Output **Rejected - Search** file

The input file can be from any outside data source but will most likely come from a local SIS (Student Information System). The output files are extracted and downloaded from the State ID System.

a) All of these files contain three different types of records in the following order:

- A header record with **TH** as the record type
- One or more student detail records with **ID** as the record type
- A trailer record with **TT** as the record type

b) All record types have a predefined list of fields.

For a file to be valid, all the requirements must be met.



**NOTE:** The files related to the Claiming Process and Batch Search will be accepted and/or available only if those features are enabled.



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## **INPUT STUDENT BATCH FILE**

---

This file is used for assigning IDs.

The following is a list of the detail fields, in order:

- Record Type
- Current School Code
- Resident District Code
- Legal Last Name
- Legal First Name
- Legal Middle Name
- Legal Name Suffix
- Gender
- Date of Birth
- Current Grade Level
- Local Student ID
- Social Security Number
- Race/Ethnicity
- State ID
- Current District Code
- Current School Year

## OUTPUT IDS ASSIGNED FILE

---

Once a **Student Batch File** is completely processed by the application, users can extract and download an **IDs Assigned** file from the State ID System. The format of this file is exactly the same as the input file, except the **State ID** column will always contain the **State ID** assigned to the student by the application. This file will only contain those students that were assigned a brand new or pre-existing State ID.

The following is a list of detail fields, in order:

- Record Type
- Current School Code
- Resident District Code
- Legal Last Name
- Legal First Name
- Legal Middle Name
- Legal Name Suffix
- Gender
- Date of Birth
- Current Grade Level
- Local Student ID
- Social Security Number
- Race/Ethnicity
- State ID
- Current District Code
- Current School Year



## OUTPUT ERRORS TO FIX FILE

---

This file can be downloaded for offline analysis purposes after the data validation stage. As records are repaired in the **Fix Errors** stage, the application will remove them from this file.

This file has all the fields in the **Student Batch File** in the same order. In addition, the following fields will be appended to the end of each detail record:

**Record Status** - always has the value *Ready to Fix Errors*.

**Record Reference Number** - an internally generated number assigned to every input record to uniquely identify it within the State ID System. This is not the State ID.

**Error List** - contains a list of validation errors that the application encountered for this input record during the validation process. If more than one error was found in a record, all errors are listed with each one delimited from the other by a semicolon.

The following is a list of detail fields, in order:

- Record Type
- Current School Code
- Resident District Code
- Legal Last Name
- Legal First Name
- Legal Middle Name
- Legal Name Suffix
- Gender
- Date of Birth
- Current Grade Level
- Local Student ID
- Social Security Number
- Race/Ethnicity
- State ID
- Current District Code
- Current School Year
- Record Status
- Record Reference Number
- Error List

---

**OUTPUT NEAR MATCH/DUPLICATES TO RESOLVE FILE**

---

This file can be downloaded for offline analysis purposes. As Near Matches are resolved, the application will remove them from this file.

This file has all the fields in the **Student Batch File** in the same order. In addition, the following fields will be appended to the end of each detail record:

**Record Status** - always has the value *Ready to Resolve Near Matches*.

**Record Reference Number** - an internally generated number assigned to every input record to uniquely identify it within the State ID System. This is **not** the **State ID**.

**Near Match/ Match List** - Contains a list of student **State IDs** in the State ID System database for which the application has returned as a Near Match or Match. If more than one Near Match or Match is found, all corresponding IDs are listed with each one delimited from the other by a semicolon.

The following is a list of fields, in order:

- Record Type
- Current School Code
- Resident District Code
- Legal Last Name
- Legal First Name
- Legal Middle Name
- Legal Name Suffix
- Gender
- Date of Birth
- Current Grade Level
- Local Student ID
- Social Security Number
- Race/Ethnicity
- State ID
- Current District Code
- Current School Year
- Record Status
- Record Reference Number

## OUTPUT CANCELED RECORDS FILE

---

This file can be downloaded to obtain a list of all records that have been canceled during the ID Assignment process.

This file has all the fields in the **Student Batch** file in the same order. In addition, the following fields will be appended to the end of each detail record:

**Record Status** – The value in this field can vary. Examples of values are: *Canceled During Match Resolution Stage* or *Canceled During Fix Errors Stage*.

**Record Reference Number** - an internally generated number assigned to every input record to uniquely identify it within the State ID System. This is **not** the **State ID**.

**Record Comments** - the value in this field can vary. For example, if the record was canceled at the fix errors stage, this field contains a list of all the errors.

The following is a list of detail fields, in order:

- Record Type
- Current School Code
- Resident District Code
- Legal Last Name
- Legal First Name
- Legal Middle Name
- Legal Name Suffix
- Gender
- Date of Birth
- Current Grade Level
- Local Student ID
- Social Security Number
- Race/Ethnicity
- State ID
- Current District Code
- Current School Year
- Record Status
- Record Reference Number
- Record Comments



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## OUTPUT REJECTED FILE

---

This file can be downloaded to obtain the same exact file that a user attempted to upload for ID Assignment but ultimately failed due to some fatal file error. This feature will be particularly useful for a client who is attempting to troubleshoot a fatal file error.

**OUTPUT FIXED RECORDS FILE**

---

This file can be downloaded to obtain a list of all records that were repaired during the *Fix Errors* step of the ID Assignment Process.

This new file will contain only:

- Records that had data errors that were corrected during *Fix Errors*
- Records that completed ID Assignment (not canceled)

The format of this file will be exactly the same as the **IDs Assigned** file except it will contain only those records that were corrected for data errors during the ID Assignment Process.

The following is a list of detail fields, in order:

Record Type  
Current School Code  
Resident District Code  
Legal Last Name  
Legal First Name  
Legal Middle Name  
Legal Name Suffix  
Gender  
Date of Birth  
Current Grade Level  
Local Student ID  
Social Security Number  
Race/Ethnicity  
State ID  
Current District Code  
Current School Year



## OUTPUT CLAIMING PROCESS FILES

---

Any one of these files can be downloaded to obtain a list of records that have been processed using the **Claiming Process** feature. Lists of accepted claims, disputed claims, deleted claims, and pending claims are available.

These files have all the fields in the **Student Batch File** in the same order. There are an additional three fields added at the end of the record that contain the following information:

**Record Status** - the value in this field can vary. For example, if a claim was accepted, the value would be *ID Updated and History Created - Auto Claim Created and Accepted*.

**Record Reference Number** - an internally generated number assigned to every input record to uniquely identify it within the State ID System. This is **not** the **State ID**.

**Record Comments** - this is always the internally generated **Claim ID**.

The following is a list of detail fields, in order:

- Record Type
- Current School Code
- Resident District Code
- Legal Last Name
- Legal First Name
- Legal Middle Name
- Legal Name Suffix
- Gender
- Date of Birth
- Current Grade Level
- Local Student ID
- Social Security Number
- Race/Ethnicity
- State ID
- Current District Code
- Current School Year
- Record Status
- Record Reference Number
- Record Comments

**BATCH SEARCH FILES**

---

These files pertain to the **Batch Search** feature of the Uniq-ID System:

**Student Batch File – Search:** The system accepts this file for batch searching. The format for this file is *exactly* the same as the **Student Batch File** for ID assignment.

**IDs Found – Search:** This file can be downloaded by users. It contains the results from a batch search. For more information on the contents of this file, please see the section of this document on batch searching.

**Canceled – Search:** This file can be downloaded by users. It contains all records that were canceled during a batch search.

**Rejected – Search:** This file can be downloaded by users. It contains the contents of a **Student Batch File – Search** that was rejected due to a fatal file error.

## APPENDIX C – BATCH INFO WINDOW

Throughout the Uniq-ID System, users can view detailed information about a particular submission by opening the **Batch Info** window:

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

**MENU**  
 Upload Batch File  
 Enter Individual Student  
 Student Search  
 Batch Search  
 Extract & Download Batch  
 Claiming Process  
 Exit Application

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

From: 05/22/2006 To: 06/21/2006

Find Batch:  Search

Upload Date	Batch Info	Status	Record Count	Next Action
06/21/2006	198	IDs Assigned	1	Download State ID
06/21/2006	197	IDs Assigned	1	Download State ID
06/21/2006	196	ID Assigned	1	Download State ID
06/21/2006	195	IDs Assigned	1	Download State ID
06/21/2006	194	ID Assigned	1	Download State ID
06/21/2006	193	IDs Assigned	1	Download State ID
06/21/2006	192	IDs Assigned	1	Download State ID
06/21/2006	191	IDs Assigned	1	Download State ID

Displaying 1 to 8 of 67 First Prev Next Last

Batch Information : Batch 28

Batch Statistics Processing Info Download Info General Info

Batch Number	28
Batch Type	Batch
Batch Status	ID CREATION COMPLETE
District Code	0009
School Code	0000
Extract Date	03/15/2005
Extract File	CreateMasterRecords.txt
Transmission ID	0071262134
Creation User ID	0000supr
Creation Date	06/07/2006
Total Records	10
Record Delimiter	0x09
Header Delimiter	0x09
File Version	1.0

Close Window

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 28	
<b>Batch Statistics</b>	Processing Info    Download Info    General Info
ID Assignment Complete	
Student Found but No Change in Data - Exact Match	6
New ID Assigned During Match Resolution Stage	2
Student Found and History Created During Assign ID Stage	2
<input type="button" value="Close Window"/>	

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

## PROCESSING INFO TAB

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

Batch Information : Batch 28	
<b>Batch Statistics</b>	<b>Processing Info</b> Download Info    General Info
06/07/2006 03:25:36 PM	Upload Completed
06/07/2006 03:25:40 PM	Validation Started
06/07/2006 03:25:41 PM	Validation Completed
06/08/2006 09:37:35 AM	Assignment Started
06/08/2006 09:37:36 AM	Assignment Completed
06/08/2006 09:41:48 AM	Resolve Near Match Started
06/08/2006 10:35:39 AM	Resolve Near Match Completed
<input type="button" value="Close Window"/>	

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

## DOWNLOAD INFO TAB

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

Batch Information : Batch 28			
Batch Statistics	Processing Info	<u>Download Info</u>	General Info
06/19/2006 04:13:11 PM		0000supr	
06/19/2006 04:15:15 PM		0000adm	
06/19/2006 04:15:30 PM		0009adm	

Close Window

## GENERAL INFO TAB

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

Batch Information : Batch 28			
Batch Statistics	Processing Info	Download Info	<u>General Info</u>
<b>Batch Number</b>		28	
<b>Batch Type</b>		Batch	
<b>Batch Status</b>		ID CREATION COMPLETE	
<b>District Code</b>		0009	
<b>School Code</b>		0000	
<b>Extract Date</b>		03/15/2005	
<b>Extract File</b>		CreateMasterRecords.txt	
<b>Transmission ID</b>		0071262134	
<b>Creation User ID</b>		0000supr	
<b>Creation Date</b>		06/07/2006	
<b>Total Records</b>		10	
<b>Record Delimiter</b>		0x09	
<b>Header Delimiter</b>		0x09	
<b>File Version</b>		1.0	

Close Window

## APPENDIX D – 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.

Status	Description	Grouping
Ready to Validate Data	The record was successfully uploaded and is ready for data validation.	Ready to Validate Data
Ready to Assign IDs	The record was successfully validated for data errors and is ready for ID assignment.	Ready to Assign IDs
Ready to Fix Data Errors	The record has data errors which need to be repaired.	Ready to Fix Data Errors
Canceled During Fix Errors Stage	The record was canceled during the Fix Errors step.	Canceled
New ID Assigned - No Matching Record Found	Matching Engine found no matching records and assigned a new ID to the student.	ID Assignment Complete
Ready to Resolve Near Matches/Duplicates	Matching Engine found at least one matching record that needs to be resolved by a user.	Ready to Resolve Near Matches/Duplicates
New ID Assigned During Match Resolution Stage	<b>Create New ID</b> was used during match resolution. Application assigned a new ID to student.	ID Assignment Complete



Status	Description	Grouping
Student Found and History Created During Match Resolution Stage	<b>Assign Selected</b> was used during match resolution. The <b>ID</b> of the selected student was assigned to the submitted student.	ID Assignment Complete
Canceled During Match Resolution Stage	The record was canceled during the Near Match Resolution step.	Canceled
No Information Available - ID Retired	The <b>State ID</b> was either assigned or created for this record was subsequently retired. For example, if the application created ID 1234567890 for a record, but that ID was later retired, any subsequent attempts to view the batch info for that record would show this status.	Other
Student Found and History Created - Exact Match	The record was identified as an <b>Exact Match</b> , as defined by the client. The student's information was updated with the new information and history was created.	ID Assignment Complete
Student Found but No Change in Data - Exact Match	The application found a matching student in the database. However, there was no change to the data and, therefore, no update to the student's information. A record can obtain this status whether or not the record was submitted with a <b>State ID</b> .	ID Assignment Complete
Canceled During Data Validation Stage - ID Contained in Record Not Found in System	The record was submitted with a <b>State ID</b> but it was invalid. That is, there was no student in the database with that <b>State ID</b> . There is no next step because the record was removed from the submission.	Canceled
Ready to Assign IDs - Exact Match	The record was submitted with a <b>State ID</b> and there is no change in the name fields or date of birth. Application marks the record with this status to help with processing during ID assignment.	Ready to Assign IDs
Waiting for Claim Response - Auto Claim Created	A claim was automatically created for this record but there has been no response. This status is used only if Auto Claiming is enabled.	Other

Status	Description	Grouping
ID Updated and History Created - Auto Claim Created and Accepted	A claim was automatically created for this record and the claim was accepted. The student's information was updated with the new information and history was created. This status is used only if Auto Claiming is enabled.	ID Assignment Complete
ID Not Updated - Auto Claim Created but Disputed	A claim was automatically created for this record but the claim was disputed. No change to the student's information. This status is used only if Auto Claiming is enabled.	ID Assignment Complete
Canceled During Assign ID Stage - Claim Required	The record was canceled because it required a claim. When Auto Claiming is disabled, any records that need a claim are auto-canceled.	Canceled
Canceled During Data Validation Stage	The record was canceled because it contained data errors. This will occur if Auto Cancel Errors is enabled or the submission type is SLF.	Canceled
Canceled During Assign ID Stage	The record was canceled because of some unexpected error during ID assignment.	Canceled
Ready to Assign IDs - ID Present in Record - No Exact Match	The record was submitted with a <b>State ID</b> and there is at least one change in the <b>Name</b> fields or <b>Date of Birth</b> . The application marks the record with this status to help with processing during ID assignment.	Ready to Assign IDs
Ready to Assign IDs - Possible Claim	The record is a transfer from one <b>District/School</b> to another and could be a possible claim. The application marks the record with this status to help with processing during ID assignment. This status is used only if Auto Claiming is enabled.	Ready to Assign IDs
Canceled During Assign ID Stage - Claim Already Exists	The record requires a claim but a claim for the student of this record already exists. This status is used only if Auto Claiming is enabled.	Canceled

Status	Description	Grouping
ID Not Updated - Auto Claim Created but Deleted	A claim was automatically created for this record but before the claim was responded to, the claim was deleted. No change to the student's information. This status is used only if Auto Claiming is enabled.	ID Assignment Complete
Canceled During Claim Creation	The record requires a claim but an unexpected error occurred during claim creation. This status is used only if Auto Claiming is enabled.	Canceled
Student Found During Assign ID Stage but History Not Created	The application found the student in its database during ID assignment but did not update that student's information. This status is used for special education districts.	ID Assignment Complete
Student Found During Match Resolution Stage but History Not Created	<b>Assign Selected</b> was clicked during match resolution but the application did not update the student's information. This status is used for special education districts.	ID Assignment Complete
New ID Assigned - Administrator	The System Administrator assigned a new ID for the student.	ID Assignment Complete
Ready to Validate Data - Search	The records are ready for data validation. This status is used for batch searches.	Search
Ready to Search IDs	The records are ready for searching. This status is used for batch searches.	Search
Canceled During Fix Errors Stage - Search	Not in use at this time.	Search

Status	Description	Grouping
No Matching Record Found - Search	The records were completely searched and the application found no matching record in its database. This status is used for batch searches.	Search
Canceled During ID Search Stage - Multiple Records Found	The records were canceled during searching because the application returned more than one match. This status is used for batch searches.	Search
Matching Record Found - Search	The records completed searching and the application found a single matching record in its database. This status is used for batch searches.	Search
Canceled During Data Validation Stage - Search	The records were canceled during data validation because they contained at least one data error. This status is used for batch searches.	Search
Canceled During ID Search Stage - Near Match(es) Found	The records were canceled during searching because the application returned at least one Near Match. This status is used for batch searches	Search
Ready to Fix Data Errors - Search	Not in use at this time.	
Ready to Assign IDs - Possible Claim Found During Assign ID Stage	The record is a transfer from one district/school to another and could be a possible claim. The application marks the record with this status during ID assignment. This status is used only if Auto Claiming is enabled.	Ready to Assign IDs
ID Updated - Administrator	The System Administrator updated the information for an ID.	ID Assignment Complete

Status	Description	Grouping
Student Found and History Created During Assign ID Stage	When this record was processed, the use of the upper threshold was enabled and that threshold was breached. The <b>ID</b> of the matching student was assigned to the submitted student.	ID Assignment Complete
Student Updated and History Created - Direct Edit	A user updated the information for an ID through the <b>Edit Student</b> feature.	ID Assignment Complete