



**Texas Education Agency**

TSDS UNIQUE ID

## **TSDS Unique ID User Guide**

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## About This Guide

This guide is a user guide for the TSDS Unique ID system. It includes descriptions of components, stepped directions, and screenshots to assist with using the application. The guide includes detailed information on error messages, file formats, and other application-specific details. All screenshots provided throughout this guide were produced using demonstration data and all SSNs on screenshots are invalid.

### Definitions, Acronyms, and Abbreviations

**Alternate ID:** A search parameter that may be used to search for a person in the TSDS Unique ID system. (Local ID can be used in this field.)

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

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

**Local ID:** The identifier that is created by the source of the data. For example, if the data is generated by the SIS, the Local ID would be the internal identifier created by that SIS.

**Master Record:** This is the active record for the person and includes the ID and all of the latest data.

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

**Pending Match:** A person record that may be a match for a submitted record.

**SIS:** Student Information System.

**Home (also referred to as the "Unique ID" or "UID"):** The internal person identifier generated by the TSDS Unique ID system. This is a generic term used by eScholar for their multi-state product, and is not the same as the Texas Home.

**Submission Record/Submitted Record:** A person record that is submitted via the batch process or that is entered into the TSDS Unique ID system by a user.

# About the Application

## Purpose

A Unique ID is required for all students and staff members in order to load information into the Texas Student Data System (TSDS) Education Data Warehouse (EDW). The TSDS Unique ID system is designed for Texas educational agencies to assign and maintain unique identifiers for student and staff members.

The TSDS Unique ID system offers more powerful matching logic than previous TEA ID management systems, reducing duplication in the database and providing more accurate data.

The application allows you to:

- Assign a unique statewide identifier for every staff member and student in pre-kindergarten, kindergarten, elementary, and secondary public education.
- Generate random Homes that are not constructed on any demographic details.
- Identify and locate a staff member or student from the TSDS Unique ID system either using the Home, Alias ID, or demographic information (e.g., last name).
- Download unique identifiers by batch or by location.
- Search by batch or by person name.
- Access the TSDS Unique ID system processing power via batch mode, manual entry, or web services (web services is not currently available).

The system also offers:

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

## System Requirements

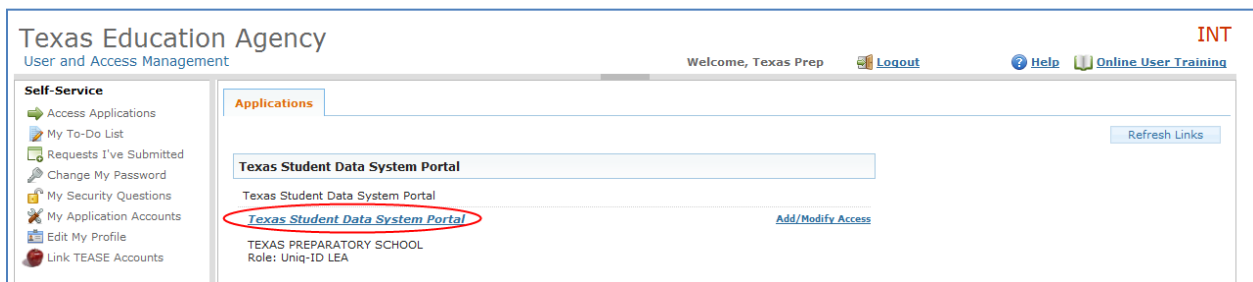
The application utilizes Adobe Acrobat and Microsoft Excel for reports provided in the application. If needed, download Adobe Acrobat from <http://get.adobe.com/reader/>. Microsoft Excel or an Excel reader can be used.

## Logging In

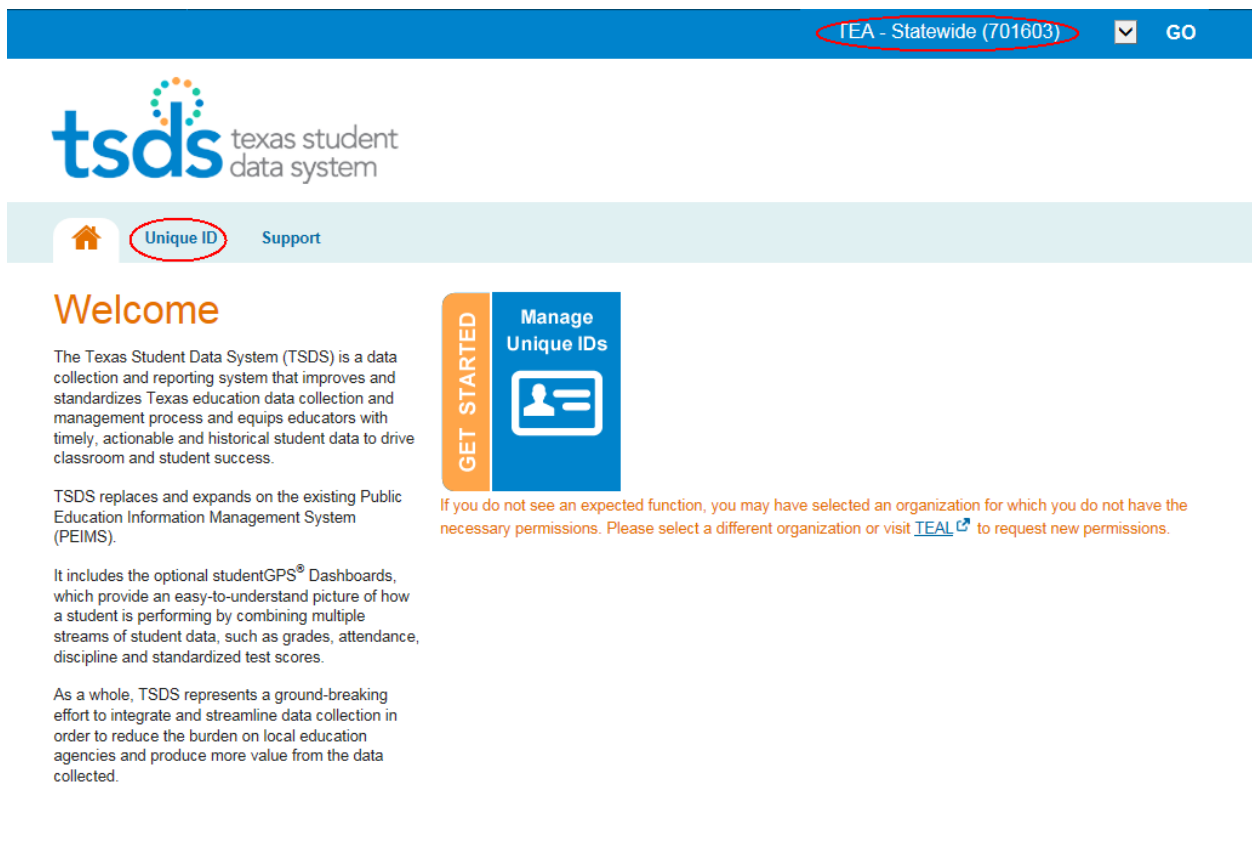
In order to access the TSDS Unique ID system, if you have not already done so, you must first set up a TEAL account and submit an account request to get access the TSDS Portal. When requesting access to the TSDS Portal, you must specify which Unique ID role is needed. This role controls the level of access they have within the TSDS Unique ID system. Once TSDS Portal Account Access is established, you log in to TEAL and select TSDS Portal, where you can access the TSDS Unique ID system.

Here is a link to TEAL: <https://pryor.tea.state.tx.us/>

After setting up your TEAL account with access to the TSDS Portal, click the **Texas Student Data System Portal** link.



The TSDS Portal page appears:



The dropdown at the top of the page displays the LEAs to which you have access. Click the **Unique ID** link or the **Get Started Manage Unique IDs** link to display the TSDS Unique ID system.

## TSDS Unique ID System Roles

Each user that has access to the TSDS Unique ID system has a specific level of access within the system. This access is based on your user role. Each user has one of the following roles:

**Unique ID Search** – this role provides search only capability of all records stored in the Unique ID database.

**Unique ID Campus** – this role allows you to search the Unique ID database, download Unique IDs, and update demographic information for a selected campus only. When this role is selected, you must enter the campus name or nine-digit number of the campus for which you are performing Unique ID tasks. **Note: This role also allows you to perform the actions associated with the Unique ID Search role.**

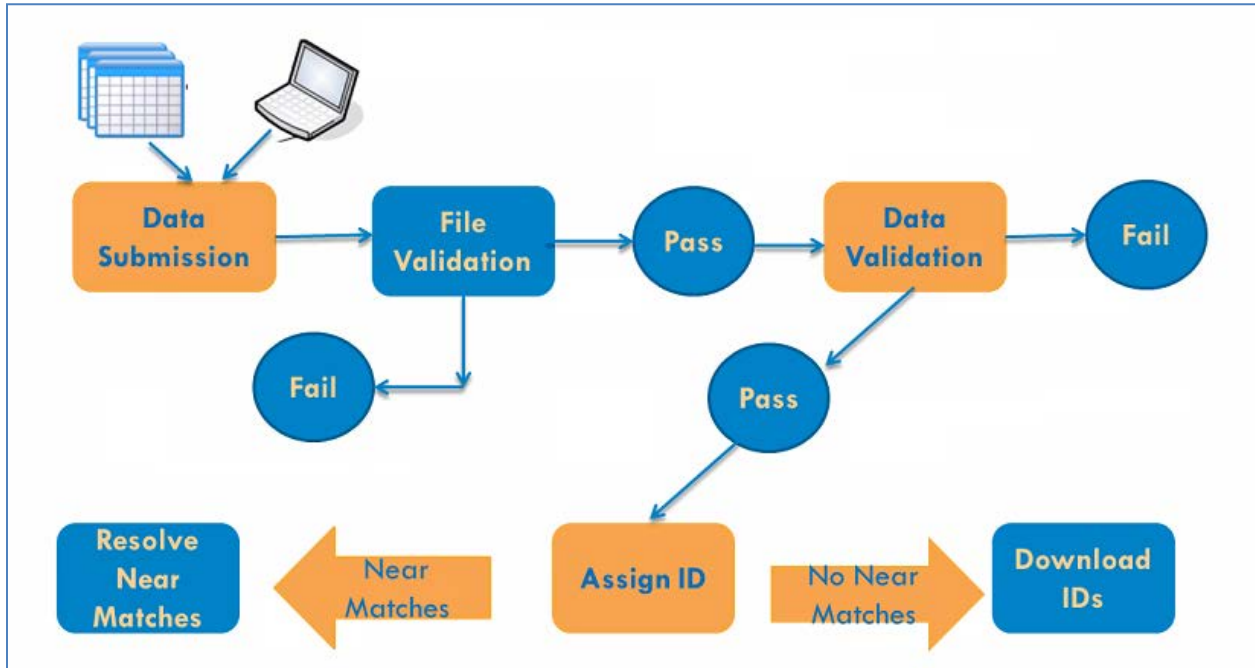
**Unique ID LEA** – this role allows you to search the Unique ID database, download Unique IDs, and update demographic information for the local education agency (LEA—Texas school district or charter school) students and staff via the Unique ID application. When this role is selected, you must enter the applicable district name or six digit county district number. **Note: This role also allows you to perform the actions associated with the Unique ID Campus and Unique ID Search roles.**

## TSDS Unique ID Assignment Process

The Unique ID assignment process within the TSDS Unique ID system consists of six distinct steps:

1. Data submission
2. File validation
3. Data validation
4. Assign ID
5. Resolving near matches
6. Download IDs





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## Features Overview

The following highlights the main features of the TSDS Unique ID system. It provides an explanation of the functionality included within each feature.

### Home Page

The Home Page provides easy access to previously submitted batches and to the application menu. Most pages throughout the application contain a **Home** button in the top right corner of the application to access the home page.

### Upload Batch File

This feature allows you to upload a student or staff batch file into the TSDS Unique ID system for Unique ID assignment. See the File section to learn more about this process.

### Enter Individual Person

This feature provides the ability to input the information for one person online and assign a Unique ID.

### Person Search

This feature allows a user to search for persons through an online interface. This function can be used to verify the details of a person already in the TSDS Unique system.

### Batch Search

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

### Extract & Download Batch

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

- Errors to fix
- Near matches/duplicates to resolve
- IDs assigned
- Canceled records
- Rejected batch files
- Fixed records
- Near match details

## Download by Location

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

## Exit Application

This link allows you to log out of the TSDS Unique ID system. Clicking **Exit Application** displays the TSDS portal page.


## Home Page

Once a user successfully logs into the system, the TSDS Unique ID system, the Home page is displayed. This page is also accessible throughout the application by clicking Home. From the Home page, you can:

- Access system components / menu items
- View previously submitted batches
- Filter batches
- Find batches
- Perform next action steps

	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
	File	1307	227901	AAA	SIS	Batch does not contain any records to process.	0 of 1	
11/24/2015 15:36	File	1300	227901	AAA	SIS	ID(s) Assigned.	9 of 10	<a href="#">DOWNLOAD UNIQUE ID</a>
11/19/2015 10:32	File	1299	227901	AAA	SIS	Batch does not contain any records to process.	0 of 10	
11/19/2015 09:38	File	1297	227901	AAA	SIS	Batch does not contain any records to process.	0 of 10	
11/06/2015 09:10	File	1296	227901	AAA	SIS	Batch does not contain any records to process.	0 of 10	

### Accessing Feature Menu Items

The menu on the top left side of the page opens when you click the  symbol. It provides access to the system components including uploading batch files, entering individual persons, performing person searches, downloading various types of output files, and exiting the application. These menu options are based on system roles and assigned privileges. Some of the menu items described throughout this manual may not be available for all users. All of the features listed on the menu above are described in further detail later in this document.

### Viewing Previously Submitted Batches

The table at the bottom of the Home page displays a list of submissions to the TSDS Unique ID system that have been uploaded via a batch file or entered online. This list displays the upload date, submission type, batch ID (a link to batch information), current status, number of records in the batch, and buttons for the next action. This list only displays batches you have access to for your current location. The button in the **Next Action** column allows you to continue where you left off in the ID assignment process.

The screenshot shows the 'UNIQUE ID' interface for Kay.Robart, AUSTIN ISD. The 'Home' page features a 'FILTER' section with the following controls:

- DISTRICT:** AUSTIN ISD [ 227901 ]
- SCHOOL:** (Empty)
- BATCH NUMBER:** (Empty)
- SUBMISSION TYPE:** All
- PROCESSING STAGE:** All
- FROM:** 08/25/2015
- TO:** 10/09/2015
- SORT:** Upload Date Desc
- FILTER RESULTS** button

Below the filters is a table with the following columns: UPLOAD DATE, SUBMISSION TYPE, BATCH INFO, DISTRICT, SCHOOL, SOURCE SYSTEM, STATUS, RECORD COUNT, and NEXT ACTION.

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
10/09/2015 09:44	File	1282	227901	AAA	SIS	Batch does not contain any records to process.	0 of 10	
10/09/2015 09:40	File	1281	227901	AAA	SIS	Batch does not contain any records to process.	0 of 1	
09/30/2015 11:57	File	1278	227901	AAA	SIS	Batch does not contain any records to process.	0 of 10	
09/30/2015 11:52	File	1277	227901	AAA	SIS	Batch does not contain any records to process.	0 of 10	
09/09/2015 10:26	Online	1275	227901	AAA	Default	ID(s) Assigned.	1 of 1	<a href="#">DOWNLOAD UNIQUE ID</a>
09/09/2015 10:19	Online	1274	227901	AAA	Default	ID(s) Assigned.	1 of 1	<a href="#">DOWNLOAD UNIQUE ID</a>
09/09/2015 10:01	Online	1273	227901	AAA	Default	ID(s) Assigned.	1 of 1	<a href="#">DOWNLOAD UNIQUE ID</a>

**Note:** The **Status** column always displays the current status of the batch and guides you to the next action. The **Next Action** column has a button that enables you to initiate the next action. The TSDS Unique ID system contains many pages that display lists of items. If the list cannot be displayed on one page, you can navigate to other pages in the list by clicking the **First**, **Prev**, **Next**, and **Last** bottom of each list.

## Filtering Batches

You can narrow display of batches in the list by using the batch filters on the Home page as illustrated in the partial screenshot below:

This partial screenshot shows the 'FILTER' section with the following controls:

- DISTRICT:** LEWISVILLE ISD [ 061902 ]
- SCHOOL:** (Empty)
- BATCH NUMBER:** (Empty)
- SUBMISSION TYPE:** All
- PROCESSING STAGE:** All
- FROM:** 08/14/2015
- TO:** 09/28/2015
- SORT:** Upload Date Desc
- FILTER RESULTS** button

The Home page includes the following filters:

- **District:** The applicable district. The application displays all of the LEAs that a user has access to so that the page can be filtered by a specific LEA.
- **School:** The name of the school. The application can find batches for a specific school if you enter it by name or number.
- **Batch Number:** The application can find batches by number.

- **Submission Type:** The type of data submission. The options are **All, File, Online, SLF, Edit, WebService,** and **Automation.** (Only **All, File** and **Online** are applicable for TSDS Unique ID).
- **Processing Stage:** The stage of processing the submission is in. The options are **All, Validate Data, Fix Errors, Assign Home, Resolve Near Matches, Download Unique ID, Canceled, Validation in Progress, Assignment in Progress, Continue Validation,** and **Continue Assignment.** (**Fix Errors** is not applicable to TSDS Unique ID.)
- **Submission Date:** The dates for the submission. Date ranges must be valid.

In addition to the filter criteria, the results can be sorted by upload date, batch number, or batch status.

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

1. Access the Home page by either logging in or clicking **Back to Home** on the menu.
2. Click the dropdown arrow or use the date picker and select the appropriate option for each of the filters.
3. Click **Filter Results.**

The page refreshes and displays results based on the filters specified.

## Finding a Batch

Using the **Batch Number** filter, you can view and work on a specific batch. The Home page displays the batch ID for each batch on the list. This batch ID is unique to the batch and can be used for finding a batch. To search for a specific batch, enter a batch ID in the **Batch Number** field and then click **Filter Results.**

In the following example, suppose you want to locate batch 1300:

The screenshot shows a filter interface with the following fields and values:

- DISTRICT:** AUSTIN ISD [ 227901 ]
- SCHOOL:** (Empty)
- BATCH NUMBER:** 1300 (highlighted with a red circle)
- SUBMISSION TYPE:** All
- PROCESSING STAGE:** All
- FROM:** 10/01/2015
- TO:** 06/09/2016
- SORT:** Upload Date Desc
- FILTER RESULTS:** (Button)

If the application finds a matching batch, the system displays the page listing only that batch, as illustrated below:

The screenshot shows a search interface with the following fields and values:

- DISTRICT: AUSTIN ISD [ 227901 ]
- SCHOOL: (empty)
- BATCH NUMBER: (empty)
- SUBMISSION TYPE: All
- PROCESSING STAGE: All
- FROM: 10/01/2015
- TO: 06/09/2016
- SORT: Upload Date Desc

A purple button labeled "FILTER RESULTS" is visible. Below the filters is a table with the following data:

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
11/24/2015 15:36	File	1300	227901	AAA	SIS	ID(s) Assigned.	9 of 10	<a href="#">DOWNLOAD UNIQUE ID</a>

If the application cannot find the batch, the system displays a message stating that no batches were found as illustrated below:

The screenshot shows a search interface with the following fields and values:

- DISTRICT: LEWISVILLE ISD [ 061902 ]
- SCHOOL: (empty)
- BATCH NUMBER: (empty)
- SUBMISSION TYPE: All
- PROCESSING STAGE: Validate Data
- FROM: 08/14/2015
- TO: 09/28/2015
- SORT: Upload Date Desc

A purple button labeled "FILTER RESULTS" is visible. Below the filters is a table with the following data:

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
No Batches Found.								

If the application finds the batch, but you do not have the appropriate rights to view it, the system displays a message stating you are not authorized to view the batch.

If you have access to more than one LEA, the application has an additional feature. If the batch number submitted is for an LEA other than the current LEA and you have access to that other LEA, the application displays a message indicating you should change your current district setting.

The screenshot shows the 'UNIQUE ID' application interface. At the top, there is a navigation bar with a hamburger menu icon and the text 'UNIQUE ID'. On the right side of the navigation bar, it says '0000supr, Springfield School District'. Below the navigation bar, there is a 'Home' link and a question mark icon. The main content area features a 'FILTER' section with several input fields: 'DISTRICT' (set to 'Springfield School District [ 800 ]'), 'SCHOOL', 'BATCH NUMBER', 'SUBMISSION TYPE' (set to 'All'), 'PROCESSING STAGE' (set to 'All'), 'FROM' (set to '02/16/2015'), 'TO' (set to '03/19/2015'), and 'SORT' (set to 'Upload Date Desc'). A 'FILTER RESULTS' button is located to the right of the filter section. Below the filter section, there is a table header with columns: 'UPLOAD DATE', 'SUBMISSION TYPE', 'BATCH INFO', 'DISTRICT', 'SCHOOL', 'SOURCE SYSTEM', 'STATUS', 'RECORD COUNT', and 'NEXT ACTION'. A link is highlighted in the 'BATCH INFO' column of the first row, with the text: 'Click here to change your current district to: ( 900 - LEA ) and go to batch: 125'.

You can switch to the other district automatically by clicking on the **here** link. Upon doing so, the system changes the district and also displays the batch.

To refresh the page to display all batches, click **Filter Results**.

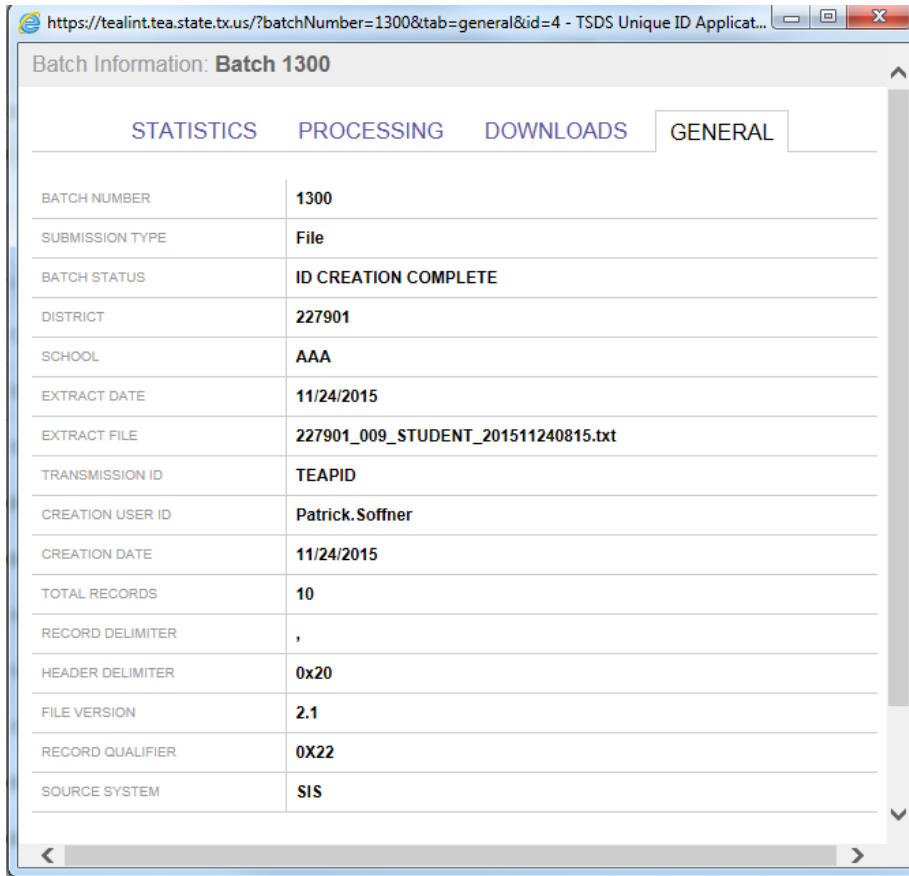
## Viewing the Batch Information

To view the information for a batch file that you have successfully loaded, click the batch number (designating all schools) in the **Batch Info** field.

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
11/24/2015 15:36	File	1300	227901	AAA	SIS	ID(s) Assigned.	9 of 10	<a href="#">DOWNLOAD UNIQUE ID</a>

Batches uploaded by LEA and campus users show information that is similar to the following example:





Batch Information: <b>Batch 1300</b>	
BATCH NUMBER	1300
SUBMISSION TYPE	File
BATCH STATUS	ID CREATION COMPLETE
DISTRICT	227901
SCHOOL	AAA
EXTRACT DATE	11/24/2015
EXTRACT FILE	227901_009_STUDENT_201511240815.txt
TRANSMISSION ID	TEAPID
CREATION USER ID	Patrick.Soffner
CREATION DATE	11/24/2015
TOTAL RECORDS	10
RECORD DELIMITER	,
HEADER DELIMITER	0x20
FILE VERSION	2.1
RECORD QUALIFIER	0X22
SOURCE SYSTEM	SIS

In the example above, the key fields show the following information:

- **Batch Status:** ID Creation Complete
- **District:** district number 227901
- **School/Site Code:** AAA, indicating that a user with LEA-wide access loaded the file, which could include information from multiple schools
- **Extract File:** name given by user to the file being loaded
- **Creation User ID:** TEAL user name ID of user loading the file

However, batch files are occasionally created during an administrative operation such as to separate shared IDs. These records look like the following:

Batch Information: **Batch 122**

STATISTICS PROCESSING DOWNLOADS **GENERAL**

Batch Number	122
Submission Type	File
Batch Status	ID CREATION COMPLETE
LEA	061902
School/Site Code	061902001
Extract Date	03/10/2004
Extract File	ADMIN_BATCH_.txt
Transmission ID	N/A
Creation User ID	10107
Creation Date	04/30/2015
Total Records	3
Record Delimiter	,
Header Delimiter	0x09
File Version	2.1
Source System	SIS

CLOSE WINDOW

This example shows a file that was automatically created by a **Separate Shared ID** admin operation. This operation takes place when two students are assigned the same ID. The system automatically generates a file to create a new ID for one of the students. The resulting file shows significantly different information in the following fields:

- **School/Site Code:** school ID of the file loaded at the school level
- **Extract File:** name given by the system for the automatically generated file
- **Creation User ID:** user ID assigned by the system

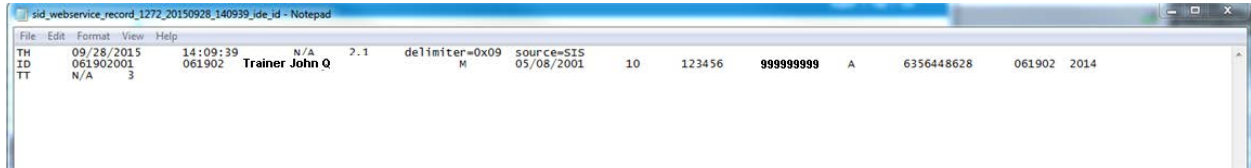
Once the Unique IDs are assigned, you can view and download the file by clicking **Download Unique ID** in the **Next Action** column:

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
03/22/2016 13:37	File	1307	227901	AAA	SIS	Batch does not contain any records to process.	0 of 1	
11/24/2015 15:36	File	1300	227901	AAA	SIS	ID(s) Assigned.	9 of 10	<a href="#">DOWNLOAD UNIQUE ID</a>


The system extracts the file and provides a **Download** button. Click the button to download the file:

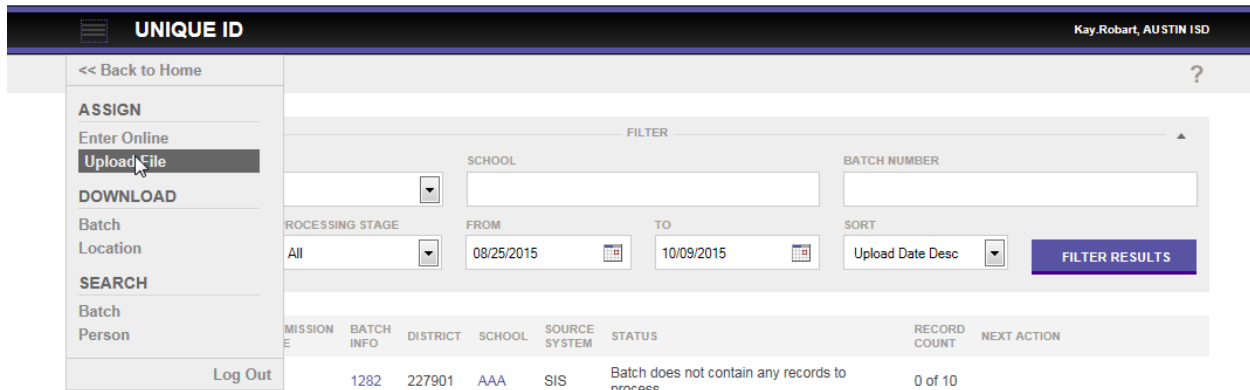
UPLOAD DATE	BATCH INFO	STATUS	RECORD COUNT	NEXT ACTION
09/02/2015 14:28	1272	File Extract Complete.	1	<a href="#">DOWNLOAD</a>

If you choose to open the file, the system displays the information with the Unique-ID added.



## Assign IDs via Batch File

You can upload batch files of student and staff records for ID assignment by clicking the **Upload File** in the menu. (Click the  symbol to bring up the menu.) Batch files must conform to the [TSDS Unique ID Specifications](#):

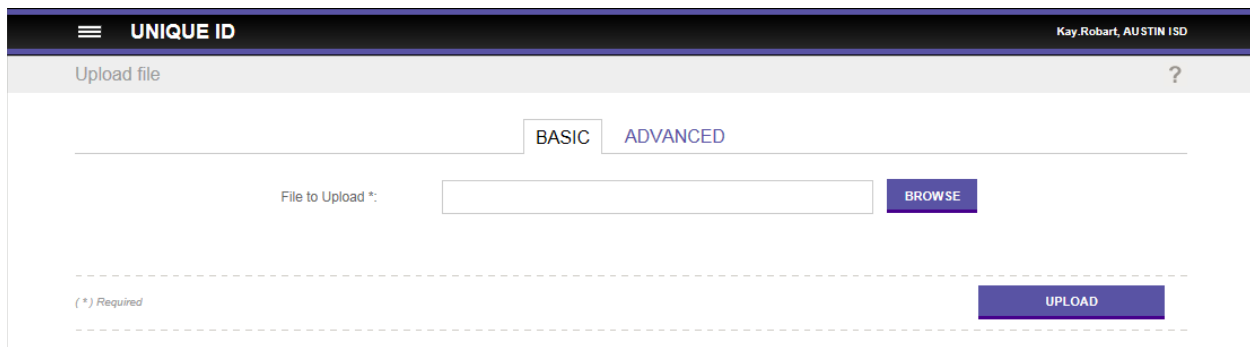


The screenshot shows the 'UNIQUE ID' system interface. On the left is a navigation menu with options: '<< Back to Home', 'ASSIGN' (with sub-options 'Enter Online' and 'Upload File'), 'DOWNLOAD' (with sub-options 'Batch' and 'Location'), 'SEARCH' (with sub-options 'Batch' and 'Person'), and 'Log Out'. The main area features a 'FILTER' section with fields for 'SCHOOL', 'BATCH NUMBER', 'PROCESSING STAGE' (set to 'All'), 'FROM' (08/25/2015), 'TO' (10/09/2015), and 'SORT' (Upload Date Desc). A 'FILTER RESULTS' button is present. Below the filter is a table with columns: MISSION, BATCH INFO, DISTRICT, SCHOOL, SOURCE SYSTEM, STATUS, RECORD COUNT, and NEXT ACTION. The table contains one row with values: 1282, 227901, AAA, SIS, and a status message 'Batch does not contain any records to process.' with a record count of '0 of 10'.

### Uploading a Batch File

To upload a batch file, follow these steps:

1. Click on the **Upload File** link in the **Menu**.
2. If the **Basic** tab isn't already selected, select it.



The screenshot shows the 'Upload file' interface. At the top, there are tabs for 'BASIC' and 'ADVANCED'. Below the tabs is a 'File to Upload \*:' field with a 'BROWSE' button. At the bottom, there is an 'UPLOAD' button. A note at the bottom left says '(\*) Required'.

3. Click **Browse** to find the file on your local computer system. The file must be located on the local computer system in order to upload the file.
4. Select the file from the local system and click **Open**.
5. Click **Upload**. This uploads the file listed in the **File to Upload** field to the TSDS Unique ID system for processing.

Once the file is uploaded, it passes through file validation in which the system performs a review of the file for issues in format and layout.

## File Upload Failure

If the system encounters any issues during the file validation stage it provides details about the errors and the file is not be uploaded. The status column displays the number of reason why the file failed to upload as illustrated below:

To view the errors, click **View All**.

As illustrated in the screenshot above, the system stores all rejected batch files in the database when they fail to upload. You can download these files using the extract and download functionality that is available from the **Home** page and filtering the view by extract type of rejected. Refer to the Extract and Download Batch section for more information about this process.

## File Upload Success

If the system does not encounter any issues with the batch file during the file validation stage, the system supplies a link under Batch Info that allows you to view details about the batch (see the Batch Information section). In addition, the file automatically proceeds to the data validation stage. The following is an example of the display if the batch file upload is successful:

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

## Data Validation

As illustrated in the screenshot above, once a file has passed file validation, the system automatically advances it to the next step, data validation. This process loads the records in the

file into the staging database tables, where further validation checks are performed on the data. This includes validation of data elements such as dates and gender and race codes.

**More Than Thirty Data Validation Errors:**

If the file has more than thirty data validation errors, then the processing of the file is canceled and the system displays first 30 errors on the page.

In this scenario, you can use the download functionality that is available from the Home page to fix the individual records that failed data validation and then resubmit the entire file.

**Less Than Thirty Data Validation Errors:**

If the file has less than thirty data validation errors, then the system automatically cancels the processing of any record within the batch file that fails data validation, but continues to process all remaining records that pass data validation.

**Note:** When there are less than thirty data validation errors, you are not alerted on the page that records have been canceled, but can check the disposition of any batch by clicking **Batch Info** (see

Appendix A – Batch Info Window). In addition, you can use the extract and download functionality to fix the individual records that failed data validation and then resubmit the file of previously canceled records.

**NOTE:** If the system is interrupted (for example, 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, you should still click **Continue Validation**.

## Assigning IDs

Once a file successfully passes data validation, the process of assigning Unique IDs can begin. Notice in the screenshot below, the **Next Action** is **Assign Unique ID**.

The screenshot shows a web interface for filtering and viewing data. At the top, there is a 'FILTER' section with fields for DISTRICT (AUSTIN ISD [ 227901 ]), SCHOOL, BATCH NUMBER, SUBMISSION TYPE (All), PROCESSING STAGE (All), FROM (04/25/2016), TO (06/09/2016), and SORT (Upload Date Desc). A 'FILTER RESULTS' button is on the right. Below this is a table with the following columns: UPLOAD DATE, SUBMISSION TYPE, BATCH INFO, DISTRICT, SCHOOL, SOURCE SYSTEM, STATUS, RECORD COUNT, and NEXT ACTION. The table contains one row with the following data: 06/09/2016 10:30, File, 1403, 227901, AAA, SIS, Data Validation Complete. Ready to Assign Unique IDs, 10 of 0. The 'ASSIGN UNIQUE ID' button in the 'NEXT ACTION' column is circled in red. At the bottom, there is a pagination bar showing 'Displaying 1 - 1 of 1' and navigation links: << FIRST, < PREV, PAGE 1 OF 1, NEXT >, LAST >>.

To assign Unique IDs, perform the following steps:

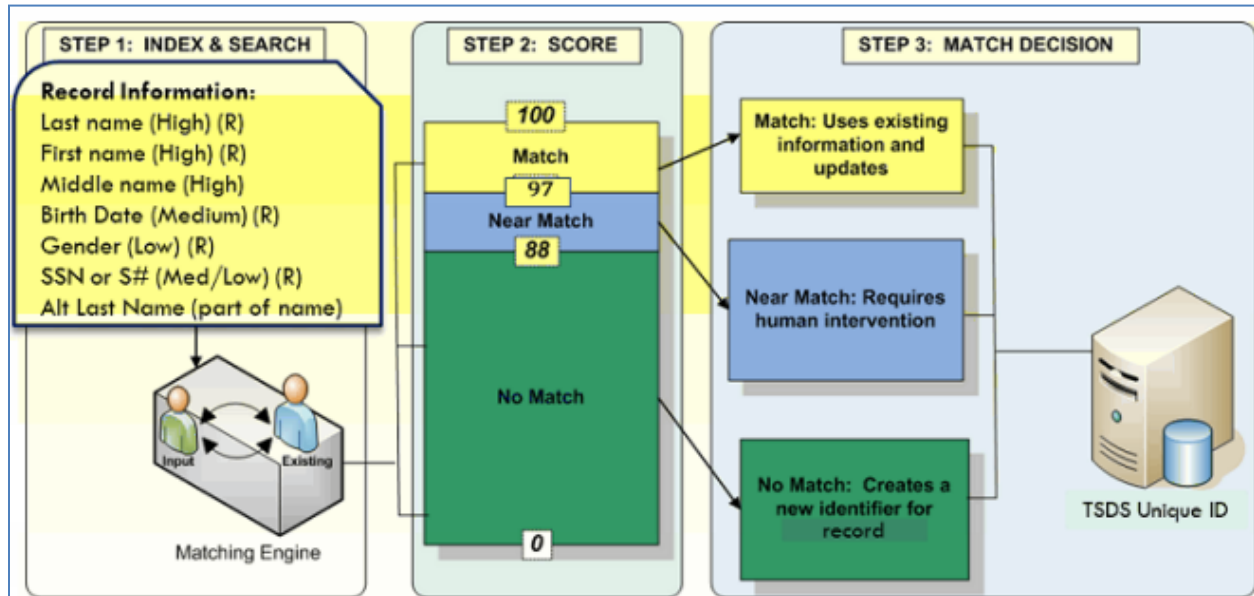
1. Click **Assign Unique ID** in the **Next Action** column. When this process is initiated, the system displays an intermediate page as illustrated below:

UPLOAD DATE	BATCH INFO	STATUS	NUMBER OF RECORDS	NEXT ACTION
06/09/2016 10:30	1403	ID Assignment is in progress.	In Progress	<a href="#">BACK TO HOME</a>

2. To review the updated status of the assignment process, click the batch number under **Batch Info** to review batch information. See Batch Information section below for more details about this.
3. Review the **Next Action** column for the appropriate next step.

When you click **Assign Unique ID** the matching logic is initiated. This compares the data on the submitted record with existing master records and assigns a match score to each

record. For each person record submitted, the matching logic can produce one of three results: match, near match, or no match. The result is dependent on the match score for the record. If the match score is 98% to 100%, then the result is match. If the match score for the record is 89% to 97%, then the result is near match. If the match score is below 89%, then the result is no match. The following is an illustration:



If the system encounters a single match, it assigns the unique ID of the matching person to the record submitted. The information contained in the submitted record becomes the current information on the record and the existing information of the matching person becomes part of that unique ID's history. These records do not need to be reviewed.

**NOTE:** If the system encounters a near match, multiple matches, or any combination of both, a unique ID is not assigned. These records need to be reviewed and resolved by a user.

If the system finds no matching person, it assigns a new unique ID. These records do not need to be reviewed.

4. Complete the next action step by clicking the button displayed in the **Next Action** column.

If one or more near matches are encountered during the assign ID stage, then the Status for the batch is **Near Matches/Duplicates Found** and the **Next Action** column displays **Resolve Near Matches**:



FILTER

DISTRICT: AUSTIN ISD [ 227901 ] SCHOOL: BATCH NUMBER:

SUBMISSION TYPE: All PROCESSING STAGE: All FROM: 04/25/2016 TO: 06/09/2016 SORT: Upload Date Desc FILTER RESULTS

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
06/09/2016 10:30	File	1403	227901	AAA	SIS	Near Matches / Duplicates Found	8 of 10	RESOLVE NEAR MATCHES

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

If the application does not find any near matches during the assign ID stage, then the **Status** for the batch is **IDs Assigned** and the **Next Action** column displays **Download Unique ID**:

FILTER

DISTRICT: AUSTIN ISD [ 227901 ] SCHOOL: BATCH NUMBER:

SUBMISSION TYPE: All PROCESSING STAGE: All FROM: 04/26/2016 TO: 06/10/2016 SORT: Upload Date Desc FILTER RESULTS

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
06/10/2016 15:05	File	1445	227901	AAA	SIS	Data Validation Complete. Ready to Assign Unique IDs	2 of 3	ASSIGN UNIQUE ID
06/10/2016 13:25	Online	1439	227901	AAA	Default	ID(s) Assigned.	1 of 1	DOWNLOAD UNIQUE ID
06/09/2016 15:07	Edit	1426	227901	AAA	SIS	ID(s) Assigned.	1 of 1	DOWNLOAD UNIQUE ID
06/09/2016 14:45	File	1425	227901	AAA	SIS	ID(s) Assigned.	2 of 2	DOWNLOAD UNIQUE ID

**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.

## Resolving Near Matches

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

When resolving pending near matches, you must decide whether or not the submission record is the same or different than the pending near matches. The submission record either matches

one of the potential matches or does not match any of them. This is a critical step in the process. See “Special Note about Near Matches.” If the submission record matches a pending near match, the assign ID button is used to indicate a match. If the submission record does not match any of the pending near matches, a new ID should be created by clicking the Create New ID button.

### **Special Note about Near Matches:**

The process of making a near match decision is *critical* to the unique identification of staff and students. When making a decision, it is important to review the information in detail to ensure the correct decision is made. The following issues can arise from poor near match decisions:

#### **Selecting Assign Selected**

Matching a submission record (i.e. selecting **Assign Selected**) to the wrong master record creates a shared identifier. That is, if the submission record is actually a different person than the one being compared and assigned, the submission record is linked to the wrong master record. This results in two different persons sharing the same unique identifier. If you select **Assign Selected** in error, please alert your System Administrator so he or she can review and resolve the identifier issue.

#### **Selecting Create New**

LEAs should *rarely* select the option to create a new unique ID. Only if the person has never been a student or staff member in a Texas LEA or charter school would this be necessary. Most of the new IDs created are done so by mistake when you really should work a near match. Creating new IDs by mistake results in serious downstream problems, and these have to be resolved and retired one-by-one.

The following chart should be used to determine the appropriate action you should take in Near Match situations:

Results of a Unique-ID Add Person for an enrolling student								Associated action to take for an enrolling student in Unique ID:				Comment
SSN/S# Match	Last Name Match	First Name Match	DOB Match	Middle Name Match	Generation Match	Gender Match	Ethnicity /Race Match	Assign Selected	Update Master See Note 1	Create New	Contact Unique-ID Champion	
N	N	N	N	-	-	-	-	-	-	-	N	No match, system will create a new UID record
N	Y	Y	Y	-	-	-	-	N	N	N	Y	Do not assign selected/Update Master unless parent wants to change ssn to S# or visa-versa. Previous district must be notified so PID error can be avoided.
N	Y	Y	N	-	-	-	-	N	N	N	Y	Do not assign selected/Update Master without notifying previous district of major demographic change so PID error can be avoided.
N	Y	N	Y	-	-	-	-	N	N	N	Y	Do not assign selected/Update Master without notifying previous district of major demographic change so PID error can be avoided.
N	N	Y	Y	-	-	-	-	N	N	N	Y	Do not assign selected/Update Master without notifying previous district of major demographic change so PID error can be avoided.
Y	Y	Y	Y	-	-	-	-	-	-	-	-	100% Match. System will assign selected.
Y	N	N	N	-	-	-	-	N	N	N	Y	Do not create a duplicate SSN record
Y	Y	Y	N	-	-	-	-	Y	Y	N	N	
Y	Y	N	Y	-	-	-	-	Y	Y	N	N	
Y	N	Y	Y	-	-	-	-	Y	Y	N	N	
Y	Y	Y	Y	Y	Y	Y	N	Y	Y	N	N	
Y	Y	Y	Y	Y	Y	N	Y	Y	Y	N	N	
Y	Y	Y	Y	Y	N	Y	Y	Y	Y	N	N	
Y	Y	Y	Y	N	Y	Y	Y	Y	Y	N	N	

The previous district should be notified of the demographic change whenever the Master record is updated.

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

- **Cancel All Checked Records:** On the initial near match page for the batch, the near match records include a check box. When **Cancel All Check Records** is clicked, all near match records that have a checked check box are canceled. Any unselected near matches remain in the pending near match queue.
- **Cancel All Near Match Records For This Batch:** On the initial near match page for the batch, all of the pending near matches can be canceled. When the **Cancel All Near Match Records For This Batch** is clicked, all pending near matches for the entire batch is canceled and are removed for the batch.
- **Assign ID:** This decision is the same as a match decision described above. When the **Assign ID** is clicked, the submission record retrieves the identifier of the selected person. When this is clicked, all other near matches for the submission record are removed.
- **Create New ID:** This decision is the same as the no match decision described above. When **Create New ID** is clicked, the submission record generates a new identifier for the person. When this is clicked, all other near matches for the submission record are removed.
- **Cancel Record:** When this is clicked, the pending near match is canceled. All pending near matches for this submission record are canceled. This only cancels the specific near match you are reviewing and does not affect other pending near matches in the batch.

When resolving pending near matches, clicking **Assign ID**, **Create New ID**, or **Cancel Record** resolves the pending near match for that submission record. That is, if one of these buttons is clicked, all other pending near matches for the submission record are considered resolved. For example, if you review a submission record that has three records that may be a match for the submitted record and clicks **Assign ID** for one of the three near matches, then the other two records are eliminated as possible near matches and the Unique ID for the selected ID is assigned. Additional details on these buttons are provided below.

### Processing Near Matches

To resolve near matches, perform the following steps:

1. Click **Resolve Near Matches** on the Home page.

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
06/09/2016 10:30	File	1403	227901	AAA	SIS	Near Matches / Duplicates Found	8 of 10	<a href="#">RESOLVE NEAR MATCHES</a>

2. Review the **Resolve Near Matches/Duplicates** page for information about the records. This page lists all of the near matches for the batch. In the example below, the submitted batch has eight records that resulted in a near match:

Near Match - Batch 1403 ?

FILTER

LAST NAME

[FILTER RESULTS](#)

Select All On Page

LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	DISTRICT	SCHOOL	RES DISTRICT	LOCAL ID	NEXT ACTION
<input type="checkbox"/>	Pupil	John	Michael		01/01/2005	MALE	227901	227901009		101010	<a href="#">REVIEW AND SELECT</a>
<input type="checkbox"/>	Student	Amy	Ann		01/01/2002	FEMALE	227901	227901009		101010	<a href="#">REVIEW AND SELECT</a>
<input type="checkbox"/>	Student	Annie	Megan		01/01/2003	FEMALE	227901	227901009		101010	<a href="#">REVIEW AND SELECT</a>
<input type="checkbox"/>	Teacher	Mary	Louise		01/01/2005	FEMALE	227901	227901009		101010	<a href="#">REVIEW AND SELECT</a>
<input type="checkbox"/>	Test	Lonnie	Lawrence		01/01/2007	MALE	227901	227901009		101010	<a href="#">REVIEW AND SELECT</a>
<input type="checkbox"/>	Tested	Mark	Matthew		01/01/2008	MALE	227901	227901009		101010	<a href="#">REVIEW AND SELECT</a>
<input type="checkbox"/>	Trainee	Janette	Emily		01/01/2008	FEMALE	227901	227901009		101010	<a href="#">REVIEW AND SELECT</a>
<input type="checkbox"/>	Trainer	Fred	J.		01/01/2004	MALE	227901	227901009		101010	<a href="#">REVIEW AND SELECT</a>

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

3. Click **Review and Select** or the hyperlinked name to view the **Resolve Near Matches/Duplicates** details page.
4. Review the **Resolve Near Matches/Duplicates** details page. As illustrated below, the top section of the page displays the submitted person record and the bottom section of the page displays a list of potential matches. Notice the match score is displayed in the **Match Probability** column:

Resolve Near Matches / Duplicates - Batch 1403 ?

PERSON RECORD TO REVIEW AND SELECT

LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	DISTRICT	SCHOOL	LOCAL ID
Trainee	Janette	Emily			01/01/2008	FEMALE	227901	227901009	101010

NEAR MATCHES / DUPLICATES FOUND

LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	DISTRICT	SCHOOL	LOCAL ID	MATCH PROBABILITY
<input type="radio"/>	Trainee	Jane	Emily		01/01/2008	FEMALE	227901	227901009	101010	88 [NEAR MATCH]

CANCEL RECORD
SELECT ANOTHER RECORD
CREATE NEW ID
ASSIGN SELECTED

The purpose of the above page is simply to provide information to help you determine if the submitted person record is the same person as one of the near match records

found, or if the submitted person record is a brand new person record submitted to the TSDS Unique ID System. The Person Record to Review and Select is the submitted record. Clicking the link in the **Last Name** or **First Name** column displays the Compare Person Information page. The link in the **School** column provides details about the school, including school name and contact information.

- Click the hyperlinked **Last Name** or **First Name** to view the Compare Person Information page. The page, as shown below, displays the submitted person in the **Person Record being reviewed** column on the left and the master person record in the **Master Person Record** column on the right of the page. All fields where information differs between the two records are highlighted. (Not all highlighted fields contribute to the near match.)

88  
MATCH SCORE

**Janette Emily Trainee** (SUBMISSION)  
GENDER: FEMALE DATE OF BIRTH: 01/01/2008 LOCAL ID: 101010 SSN: ##-##-0077

vs

**Jane Emily Trainee** (#509451661)  
GENDER: FEMALE DATE OF BIRTH: 01/01/2008 LOCAL ID: 101010 SSN: ##-##-0077

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

FIELDS	SUBMISSION RECORD	MASTER RECORD <small>(UNIQUE ID: 509451661)</small>	ADD NOTE
FIRST NAME	Janette	Jane	
LAST NAME	Trainee	Trainee	
MIDDLE NAME	Emily	Emily	
SUFFIX			
ALT LAST NAME			
DATE OF BIRTH	01/01/2008	01/01/2008	
GENDER	FEMALE	FEMALE	
SSN	900-99-0077	900-99-0077	
ETHNICITY	Non-Hispanic/Latino	Non-Hispanic/Latino	
RACE/ETHNICITY	Native Hawaiian/Other Pacific Islander	Native Hawaiian/Other Pacific Islander	
RACE 2			
RACE 3			
RACE 4			
RACE 5			
DISTRICT	227901-AUSTIN ISD	227901-AUSTIN ISD	

Notice that that system assigns a **Match Score**, indicating how much of the person’s data matches. In the example above, everything matches except the person’s first name, which is similar.

Decide how the near match should be resolved. To resolve a near match a user can assign an ID, create a new ID or cancel the record. A near match is only resolved once, so once you click a decision button, the near match is resolved. Once a decision is submitted, you cannot change it.

### Assign Selected

If the person under review is the same as master record, click **Assign Selected**. This choice indicates that the submitted person record is the same as the master record and the Unique ID of the master record is assigned to the submission record (i.e. a new unique ID is not created).

If you have authorization to update the master data, the application displays **Update Master** radio buttons (**Yes** and **No**).

If you select **Yes**, then the master record *is* updated with the submission record information. By changing a master record, the previous LEA needs to be notified of the change in order to prevent a future PID error.

The system asks you **Are you sure the selected person is your person?** If you are sure, click **OK**; otherwise, click **Cancel**. If you click **Yes**, the ID is assigned. If you click **Cancel**, it is not.

If you select **Cancel**, then the master record *is not* updated with the submission record information.

### Create New ID

If the submitted record is different from the master record, click **Create New ID**. This indicates the submitted person is different than the master record and a new Unique ID is created for the submission record.

**Important!** When reviewing near matches, look at the Match Score, the District code, and the School ID. These items will help to *determine if* this is the same person. In most cases, the near match record is the same person as the submitted record. Discrepancies between the submitted record and an existing near match record found by the system do not mean that a new Unique ID should be created. In most cases, the near match record is the same person as the record submitted and the correct course of action is to click **Assign Selected**.

### Cancel Record

To cancel the record under review, click **Cancel Record**. When you click **Cancel Record**, the pending near match is canceled. If a pending near match is canceled, no Unique ID is assigned or created and the record must be resubmitted to the application.

### Return to List of Near Matches

You can also navigate back to the list of Near Matches by clicking **Select Another Record**.

6. Click the appropriate decision button (**Assign Selected**, **Create New ID**, or **Cancel Submission**).
7. Return to the Home page, or click **Select Another Record** to return to the Resolve Near Matches/Duplicates details page.

## Scenarios That Always Result in Near Match

The following scenarios always produce a result of near match:

### Multiple Matches:

If two or more potential matches are found, the result is near match, as illustrated below:

88  
MATCH SCORE

**Janette Emily Trainee** (SUBMISSION)  
GENDER: FEMALE DATE OF BIRTH: 01/01/2008 LOCAL ID: 101010 SSN: ###-##-0077

vs

**Jane Emily Trainee** (W0699451661)  
GENDER: FEMALE DATE OF BIRTH: 01/01/2008 LOCAL ID: 101010 SSN: ###-##-0077

### COMPARE RECORDS

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

FIELDS	SUBMISSION RECORD	MASTER RECORD (UNIQUE ID: 5699451661)	ADD NOTE
FIRST NAME	Janette	Jane	
LAST NAME	Trainee	Trainee	
MIDDLE NAME	Emily	Emily	
SUFFIX			
ALT LAST NAME			
DATE OF BIRTH	01/01/2008	01/01/2008	
GENDER	FEMALE	FEMALE	
SSN	900-99-0077	900-99-0077	
ETHNICITY	Non-Hispanic/Latino	Non-Hispanic/Latino	
RACE/ETHNICITY	Native Hawaiian/Other Pacific Islander	Native Hawaiian/Other Pacific Islander	
RACE 2			
RACE 3			
RACE 4			
RACE 5			
DISTRICT	227901-AUSTIN ISD	227901-AUSTIN ISD	

Texas Education Agency

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### SSNs Different

If a match is found but the SSNs are different between the submitted record and the master record, the result is a near match as illustrated below:

**88**  
MATCH SCORE

**Annabelle J. Trainee** (SUBMISSION)  
GENDER: FEMALE DATE OF BIRTH: 01/01/2004 LOCAL ID: 202020 SSN: 999-11-0022

**Annabelle J. Trainee** (1362197327)  
GENDER: FEMALE DATE OF BIRTH: 01/01/2004 LOCAL ID: 202020 SSN: 999-11-0023

#### COMPARE RECORDS

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

FIELDS	SUBMISSION RECORD	MASTER RECORD (UNIQUE ID: 1362197327)	ADD NOTE
FIRST NAME	Annabelle	Annabelle	
LAST NAME	Trainee	Trainee	
MIDDLE NAME	J.	J.	
SUFFIX			
ALT LAST NAME			
DATE OF BIRTH	01/01/2004	01/01/2004	
GENDER	FEMALE	FEMALE	
SSN	999-11-0022	999-11-0023	
ETHNICITY	Non-Hispanic/Latino	Non-Hispanic/Latino	
RACE/ETHNICITY	Native Hawaiian/Other Pacific Islander	Native Hawaiian/Other Pacific Islander	
RACE 2			
RACE 3			
RACE 4			
RACE 5			
DISTRICT	227901-AUSTIN ISD	227901-AUSTIN ISD	
SCHOOL	227901009-ANDERSON H S	227901009-ANDERSON H S	
RES DISTRICT			
GRADE LEVEL	7	7	
SCHOOL YEAR	2014	2014	
SOURCE SYSTEM	SIS	SIS	
LOCAL ID	202020	202020	
UNIQUE ID		1362197327	
ALTERNATE ID			
ALTERNATE SOURCE			
SERIAL #	476641	476640	
CREATED	06/09/2016	06/09/2016	
LAST UPDATED	06/09/2016	06/09/2016	
COMMENTS	1362197327		
MATCH NOTES	SSN No Match		
UPDATE MASTER	<input checked="" type="radio"/> Yes <input type="radio"/> No		

RETURN TO LIST CANCEL SUBMISSION CREATE NEW ID ASSIGN SELECTED

RETURN TO LIST CANCEL SUBMISSION CREATE NEW ID ASSIGN SELECTED

In the previous example, since the only data element that is different is the SSN, then the persons are most likely the same. If you determine that these are the same people then:

IF:	THEN:
The SSN on the existing Master Record is correct.	<ol style="list-style-type: none"> <li>1. Select <b>No</b> for <b>Update Master</b>.</li> <li>2. Select <b>Assign Selected</b>.</li> <li>3. Download the record to update the information in the SIS.</li> </ol>
The SSN on the existing Master Record is incorrect.	<ol style="list-style-type: none"> <li>1. Select <b>Yes</b> for Update Master.</li> <li>2. Select <b>Assign Selected</b>.</li> </ol>

97

**Randy James Pupil** (SUBMISSION)

GEN: MALE DATE OF BIRTH: 01/01/2006 LOCAL ID: 101010 SSN: 999-06-4333

**vs**

**Randy James Pupil** (1324656269)

GEN: MALE DATE OF BIRTH: 01/01/2006 LOCAL ID: 202020 SSN: 999-06-4433

### COMPARE RECORDS

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

FIELD	SUBMISSION RECORD	MASTER RECORD (UNIQUE ID: 1324656269)	ADD NOTE
FIRST NAME	Randy	Randy	
LAST NAME	Pupil	Pupil	
MIDDLE NAME	James	James	
SUFFIX			
ALT LAST NAME			
DATE OF BIRTH	01/01/2006	01/01/2006	
GEN	MALE	MALE	
SSN	999-12-1234	999-12-1224	
ETHNICITY	Non-Hispanic/Latino	Non-Hispanic/Latino	
RACE/ETHNICITY	Native Hawaiian/Other Pacific Islander	Native Hawaiian/Other Pacific Islander	
RACE 2			
RACE 3			
RACE 4			
RACE 5			
DISTRICT	227901-AUSTIN ISO	227901-AUSTIN ISO	
SCHOOL	227901009-ANDERSON H S	227901009-ANDERSON H S	
RES DISTRICT			
GRADE LEVEL	6	6	
SCHOOL YEAR	2014	2014	
SOURCE SYSTEM	SIS	SIS	
LOCAL ID	101010	202020	
UNIQUE ID		1324656269	
ALTERNATE ID			
ALTERNATE SOURCE			
SERIAL #	476675	476674	
CREATED	06/09/2016	06/09/2016	
LAST UPDATED	06/09/2016	06/09/2016	
COMMENTS	1324656269;		
MATCH NOTES			
UPDATE MASTER	<input checked="" type="radio"/> Yes <input type="radio"/> No		

RETURN TO LIST
CANCEL SUBMISSION
CREATE NEW ID
ASSIGN SELECTED

In the example above, since, in addition to the SSN, the Local ID is different, the person records may actually belong to different people. You must do some further checking to determine the appropriate action to take.

### SSNs Same

If no match is found but the SSNs are the same between a submitted record and a master record, the result is near match, as illustrated below:

88  
MATCH SCORE

**Able Benjamin Tested** (SUBMISSION)

GENDER: FEMALE DATE OF BIRTH: 01/01/2009 LOCAL ID: 101010 SSN: 999-22-2441

**Lloyd Henry Tester** (UNIQUE ID: 5354374713)

GENDER: MALE DATE OF BIRTH: 01/01/2008 LOCAL ID: 101010 SSN: 999-22-2441

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

FIELD	SUBMISSION RECORD	MASTER RECORD <small>(UNIQUE ID: 5354374713)</small>	ADD NOTE
FIRST NAME	Able	Lloyd	
LAST NAME	Tested	Tester	
MIDDLE NAME	Benjamin	Henry	
SUFFIX			
ALT LAST NAME			
DATE OF BIRTH	01/01/2009	01/01/2008	
GENDER	FEMALE	MALE	
SSN	999-22-2444	999-22-2444	
ETHNICITY	Non-Hispanic/Latino	Non-Hispanic/Latino	
RACE/ETHNICITY	Native Hawaiian/Other Pacific Islander	Native Hawaiian/Other Pacific Islander	
RACE 2			
RACE 3			
RACE 4			
RACE 5			
DISTRICT	227901-AUSTIN ISD	227901-AUSTIN ISD	
SCHOOL	227901009-ANDERSON H S	227901009-ANDERSON H S	
RES DISTRICT			
GRADE LEVEL	8	5	
SCHOOL YEAR	2014	2014	
SOURCE SYSTEM	SIS	SIS	
LOCAL ID	101010	101010	
UNIQUE ID		5354374713	
ALTERNATE ID			
ALTERNATE SOURCE			
SERIAL #	476697	476644	
CREATED	06/09/2016	06/09/2016	
LAST UPDATED	06/09/2016	06/09/2016	
COMMENTS	5354374713:		
MATCH NOTES	SSN Match		
UPDATE MASTER	<input checked="" type="radio"/> YES <input type="radio"/> NO		

RETURN TO LIST
CANCEL SUBMISSION
CREATE NEW ID
ASSIGN SELECTED

In this scenario, as illustrated above, these are most likely two different persons and you should use the following table to determine what action to take:

IF:	THEN:
<p>The SSN is not correct for your person in your district source system, for the submitted record (<b>Person Record being reviewed</b>).</p>	<ol style="list-style-type: none"> <li>1. Click <b>Cancel Submission</b>.</li> <li>2. Correct the SSN in the source system.</li> <li>3. Resubmit/re-enter the record.</li> </ol>
<p>The person record submitted has the correct SSN.</p>	<ol style="list-style-type: none"> <li>1. Click <b>Cancel Submission</b>.</li> <li>2. Contact the LEA who owns the Master Record with the incorrect SSN and ask them to correct it.</li> <li>3. After the conflict is resolved by the other LEA, then resubmit the record. *</li> </ol> <p>*Resolve the conflict by emailing the district holding the record with the incorrect SSN. Use the PET hyperlink inside the EDIT Plus application.</p>

If the **Master Person Record** is updated after the near match is created, the application displays a message in the **Comments** row.

**Field Descriptions on the Compare Person Information page:**

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

On the **Resolve Near Matches/Duplicates** page, information about the school of the matching person is displayed by clicking the school code link in the **School** column:

PERSON RECORD TO REVIEW AND SELECT

LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	DISTRICT	SCHOOL	LOCAL ID
Pupil	Randy	James			01/01/2005	MALE	227901	227901009	101010

NEAR MATCHES / DUPLICATES FOUND

	LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	DISTRICT	SCHOOL	LOCAL ID	MATCH PROBABILITY
<input type="radio"/>	Pupil	Randy	James			01/01/2005	MALE	227901	227901009	202020	97 [NEAR MATCH]

CANCEL RECORD
SELECT ANOTHER RECORD
CREATE NEW ID
ASSIGN SELECTED

If you click the school code link, the school information appears as illustrated below:

The screenshot shows a web browser window with the URL <https://tealint.tea.state.tx.us/?district=227901&school=227901009>. The page title is "SCHOOL INFORMATION: ANDERSON H S". The information is presented in a table format:

DISTRICT	227901
DISTRICT NAME	AUSTIN ISD
SCHOOL	227901009
SCHOOL NAME	ANDERSON H S
STREET	8403 MESA DR
CITY	AUSTIN
STATE	TX
ZIP	78759-8199
CONTACT	M S DONNA HOUSER
TITLE	PRINCIPAL
PHONE	(512) 414-2538
FAX	(512) 338-1293
EMAIL	
EMAIL 2	

At the bottom of the window is a "CLOSE WINDOW" button.

If you do not make a decision on the **Compare Person Information** page and **Return to List of Near Matches** is clicked, you can make a decision on the near match summary page as shown below:

The screenshot shows the "Resolve Near Matches / Duplicates - Batch 1422" page. A warning message states: "WARNING: A potential duplicate near match exists for this record in at least one other batch. Batch Number(s): 1420, 1421".

The page displays a table for "PERSON RECORD TO REVIEW AND SELECT":

LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	DISTRICT	SCHOOL	LOCAL ID
Pupil	Randy	James			01/01/2005	MALE	227901	227901009	101010

Below this is a section for "NEAR MATCHES / DUPLICATE FOUND":

	LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	DISTRICT	SCHOOL	LOCAL ID	MATCH PROBABILITY
<input type="radio"/>	Pupil	Randy	James			01/01/2005	MALE	227901	227901009	202020	97 [NEAR MATCH]

At the bottom are four buttons: "CANCEL RECORD", "SELECT ANOTHER RECORD", "CREATE NEW ID", and "ASSIGN SELECTED".

For more details on the **Assign Selected** and **Create New ID**, refer to the Resolving Near Matches section.

## Canceling Near Matches

In addition to canceling a record from the **Resolve Near Matches/Duplicates** detail page shown above, records can also be canceled from the **Resolve Near Matches/Duplicates** home page shown below. When you cancel the near match record, it is removed from Unique ID processing and you must resubmit the record in order to process the record.

- To cancel specific records, check the boxes to the left of the records that are to be canceled and then click **Cancel All Checked Records**.
- To cancel all records on the page, check the **Select All on Page** checkbox and then click **Cancel All Checked Records**.
- To cancel all records in the batch, click **Cancel All Near Match Records For This Batch**. The list of Near Match records may span two or more pages. Clicking **Cancel All Near Match Records for This Batch** cancels all near matches in the batch list, not just the batches displayed on an individual page.

## Filtering Near Matches

To filter the list of names on the **Resolve Near Match/Duplicates** page, type the last name or partial last name of the person in the **Last Name** text box and click **Filter Results**. This filters the listing to only the last names matching the filter.

Example of the list before the filter:

FILTER

LAST NAME  
|

FILTER RESULTS

Select All On Page

LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	DISTRICT	SCHOOL	REG DISTRICT	LOCAL ID	NEXT ACTION
<input type="checkbox"/> Pupil	Randy	James			01/01/2005	MALE	227901	227901009		101010	<a href="#" style="background-color: #4a7ebb; color: white; padding: 2px 5px; border-radius: 3px;">REVIEW AND SELECT</a>
<input type="checkbox"/> Smith	Jonathan	Frederick			06/06/2002	MALE	227901	227901009		202020	<a href="#" style="background-color: #4a7ebb; color: white; padding: 2px 5px; border-radius: 3px;">REVIEW AND SELECT</a>
<input type="checkbox"/> Tested	Able	Benjamin			01/01/2009	FEMALE	227901	227901009		101010	<a href="#" style="background-color: #4a7ebb; color: white; padding: 2px 5px; border-radius: 3px;">REVIEW AND SELECT</a>
<input type="checkbox"/> Trainee	Annabelle	J.			01/01/2004	FEMALE	227901	227901009		202020	<a href="#" style="background-color: #4a7ebb; color: white; padding: 2px 5px; border-radius: 3px;">REVIEW AND SELECT</a>

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CANCEL ALL NEAR MATCH RECORDS FOR THIS BATCH

CANCEL ALL CHECKED RECORDS

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

FILTER

LAST NAME  
Pupil

FILTER RESULTS

Select All On Page

LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	DISTRICT	SCHOOL	REG DISTRICT	LOCAL ID	NEXT ACTION
<input type="checkbox"/> Pupil	Randy	James			01/01/2005	MALE	227901	227901009		101010	<a href="#" style="background-color: #4a7ebb; color: white; padding: 2px 5px; border-radius: 3px;">REVIEW AND SELECT</a>

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CANCEL ALL NEAR MATCH RECORDS FOR THIS BATCH

CANCEL ALL CHECKED RECORDS

## Downloading IDs

Once all Near Match records for a batch are resolved (or canceled), the next step in the process is to download the ID. The Home page displays the status of the batch as “ID Assigned” and **Download Unique ID** in the **Next Action** column.

The screenshot shows a filter panel at the top with fields for DISTRICT (AUSTIN ISD [ 227901 ]), SCHOOL, BATCH NUMBER, SUBMISSION TYPE (All), PROCESSING STAGE (All), FROM (04/26/2016), TO (06/10/2016), and SORT (Upload Date Desc). A 'FILTER RESULTS' button is on the right. Below the filter panel is a table with the following data:

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
06/09/2016 15:07	Edit	1426	227901	AAA	SIS	ID(s) Assigned.	1 of 1	<a href="#">DOWNLOAD UNIQUE ID</a>

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

1. Click **Download Unique ID** on the application home page for the appropriate batch.
2. Download the file by clicking the **Download** button in the **Next Action** column. Doing so opens a file download dialogue box that allows the file to be saved to your local computer or opened.

The screenshot shows a table row with the following data:

UPLOAD DATE	BATCH INFO	STATUS	RECORD COUNT	NEXT ACTION
06/09/2016 14:05	1422	File Extract Complete.	6	<a href="#">DOWNLOAD</a>

The format of the downloaded file includes the same data as the batch file with the additional data element of Unique ID for each person record.



## Assign an ID for an Individual Person

Authorized users can process a single person record for ID Assignment by clicking the Enter Individual Person link in the Menu:

This feature allows you to:

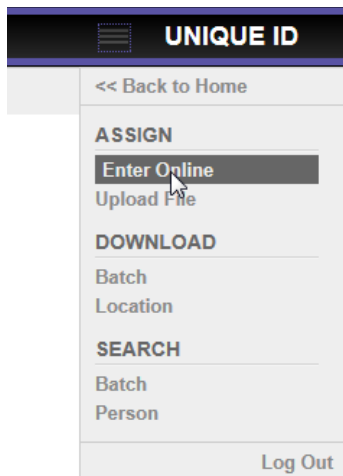
- Manually enter one person at a time
- Validate and fix data
- Assign IDs
- Resolve Near Matches
- Download IDs

**Note:** The ability to enter persons is dependent on your security profile. If the security profile does not permit you to enter persons, you not see the **Enter Individual Person** link.

### Entering Individual Persons

To enter persons, perform the following steps:

1. Select **Enter Online** from the menu:



2. Complete the **Person Data Entry** form:

Enter Online - Data Entry ?

---

GENERAL INFORMATION		ENROLLMENT INFORMATION	
FIRST NAME *	<input type="text"/>	GRADE *	<input type="text"/>
MIDDLE NAME	<input type="text"/>	SCHOOL *	<input type="text"/>
LAST NAME *	<input type="text"/>	DISTRICT *	<input type="text"/>
ALT LAST NAME	<input type="text"/>	RES DISTRICT	<input type="text"/>
SUFFIX	<input type="text"/>	SCHOOL YEAR *	<input type="text"/>
GENDER *	<input type="text"/>	LOCAL ID *	<input type="text"/>
DATE OF BIRTH *	<input type="text" value="mm"/> / <input type="text" value="dd"/> / <input type="text" value="yyyy"/>	SOURCE SYSTEM *	Default
ETHNICITY INDICATOR *	<input type="text"/>	ALTERNATE ID	<input type="text"/>
ETHNICITY/RACE *	<input type="text"/>	ALTERNATE SOURCE	<input type="text"/>
RACE 2 CODE	<input type="text"/>		
RACE 3 CODE	<input type="text"/>		
RACE 4 CODE	<input type="text"/>		
RACE 5 CODE	<input type="text"/>		
SSN *	<input type="text"/>		

(\*) Required

As illustrated above, the form includes the following sections:

- **General Information** – includes basic information such as name, date of birth, gender, ethnicity, and other demographic fields
- **Enrollment Information** – includes the grade, school, district, local ID, alternate ID and other enrollment fields.

Red asterisks indicate which fields are required. Note the following:

- SSN is required and must be valid.
  - If the person is a staff member, Grade must be 00
  - School must be the nine-digit code associated with the school. (the six-digit LEA code and the three-digit school code) e.g. 227901002.
  - If the person is a staff member and not assigned to a campus, then enter the six-digit district number and a campus code of 000. (e.g. 227901000)
  - District must be the six-digit number. e.g. 227901
3. Once the form has been completed, including all required fields, return to the Home page
  4. Click **Assign Unique ID**.

## Validating and Fixing Data

The TSDS Unique ID system validates all the data entered. If one or more data errors are found, the system displays errors as shown below.

Enter Online - Data Entry
?

**Validation Errors :** Ethnicity Indicator is required , School is invalid , SSN is invalid

GENERAL INFORMATION

FIRST NAME *	Johanna
MIDDLE NAME	Mendelssohn
LAST NAME *	Trainer
ALT LAST NAME	
SUFFIX	<input type="text"/>
GENDER *	FEMALE <input type="text"/>
DATE OF BIRTH*	05 / 15 / 2005
ETHNICITY INDICATOR *	<input type="text"/>
ETHNICITY/RACE *	Asian
RACE 2 CODE	<input type="text"/>
RACE 3 CODE	<input type="text"/>
RACE 4 CODE	<input type="text"/>
RACE 5 CODE	<input type="text"/>
SSN *	999 - 99 - 9999

ENROLLMENT INFORMATION

GRADE: *	5
SCHOOL: *	Concord Alternate
DISTRICT *	061902
RES DISTRICT	<input type="text"/>
SCHOOL YEAR *	2015
LOCAL ID *	062901553
SOURCE SYSTEM *	SIS
ALTERNATE ID	<input type="text"/>
ALTERNATE SOURCE	<input type="text"/>

CUSTOMER DEFINED FIELDS

(\*) Required

CLEAR

ASSIGN UNIQUE ID

If errors are displayed, they must be corrected. Once all errors are corrected, click **Assign Unique ID**. The system does not go to the next step of assigning the IDs until all fields successfully pass validation.

## Assigning IDS

The TSDS Unique ID system takes the Enter Online data submission through all the stages of the ID assignment process, just as if the information was submitted via the batch process. As such, the system reviews then determines a status of match, near match, or no match during the ID Assignment process.

## Resolving Near Matches

If the submission encounters any near matches during the ID assignment process, the application displays the status as **Near Matches/Duplicates found** and displays a **Resolve Near Matches** in the **Next Action** column. For more information on resolving near matches, please review the Processing Near Matches section above.

**Note:** The application creates a virtual batch for every record entered online through the Enter Individual Person feature. That batch, however, only contains the one record that was entered.

## Downloading IDS

Upon completion of the steps described above, the system displays the status of the batch as “ID Assigned”, the number of records (which is always 1), a download link and **Enter Another Person**.

Assign ID				
UPLOAD DATE	BATCH INFO	STATUS	NUMBER OF RECORDS	NEXT ACTION
06/10/2016 13:25	1439	ID(s) Assigned. New Unique ID Created for the Person is 4336254982	1	<a href="#">ENTER ANOTHER PERSON</a>

You can obtain the Unique ID that is assigned from the Status column or can download the file by returning to the Home page and selecting **Download Unique ID**.

## Person Search

You can search for persons online by clicking the **Person** under **Search** in the menu:

Person Search - Individual Person ?

BASIC SEARCH   ADVANCED SEARCH   ID SEARCH

First Name:\*

Middle Name:

Last Name:\*

Suffix:

Date Of Birth:  /  /

(\*) Required

CLEAR   SEARCH

This feature allows you to:

- Search for persons
- View person information
- Edit person information
- Add Person Notes
- View Person Notes

### Searching for a Person

To search for persons perform the following:

1. Click on the **Person Search** link on the **Menu**.
2. Select the appropriate search tab. This module has four types of searches available: **Simple Search**, **Advanced Search**, **Home Search**, and **Alternate ID Search**.
  - **Simple Search** allows you to search for a person using basic demographic information.

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

- **Advanced Search** allows you to search for a person using all available fields.

BASIC SEARCH   ADVANCED SEARCH   ID SEARCH

---

GENERAL INFORMATION   ENROLLMENT INFORMATION

FIRST NAME *	
MIDDLE NAME	
LAST NAME *	
ALT LAST NAME	
SUFFIX	<input type="checkbox"/>
GENDER	<input type="checkbox"/>
DATE OF BIRTH	mm <input type="checkbox"/> / dd <input type="checkbox"/> / yyyy <input type="checkbox"/>
ETHNICITY INDICATOR	<input type="checkbox"/>
ETHNICITY/RACE	<input type="checkbox"/>
RACE 2 CODE	<input type="checkbox"/>
RACE 3 CODE	<input type="checkbox"/>
RACE 4 CODE	<input type="checkbox"/>
RACE 5 CODE	<input type="checkbox"/>
SSN	- - -

GRADE LEVEL	<input type="checkbox"/>
SCHOOL	
DISTRICT	
RES DISTRICT	
SCHOOL YEAR	
LOCAL ID	
SOURCE SYSTEM	<input type="checkbox"/>

CUSTOMER DEFINED FIELDS

(\*) Required

CLEAR   SEARCH

- **ID Search** allows you to search for persons by Home.

BASIC SEARCH   ADVANCED SEARCH   ID SEARCH

---

ID:\*

ID Type:\*  Unique ID    Alias ID

Source:

(\*) Required

CLEAR   SEARCH

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

**Note:** The application searches against the *current information* for persons who have been assigned an ID. Searching for a person’s history information (e.g., previous school code) does not return results.

## Viewing the Search Results

After you click **Search**, the system displays the search results. These results can be either **No records found** or a list of matching results. If no matches are found for the search criteria, the system displays a message under the search form.

BASIC SEARCH
ADVANCED SEARCH
ID SEARCH

First Name:\*

Middle Name:

Last Name:\*

Suffix:

Date Of Birth:  /  /

(\*) Required

---

SEARCH RESULTS  
 No records found.

When one or more persons are found, the application displays the matching records. The match score is displayed in the **Match Probability** column. Records are displayed in descending order based on the match score as illustrated below:

BASIC SEARCH
ADVANCED SEARCH
ID SEARCH

First Name:\*

Middle Name:

Last Name:\*

Suffix:

Date Of Birth:  /  /

(\*) Required

---

SEARCH RESULTS

UNIQUE ID	LAST NAME	FIRST NAME	MIDDLE NAME	SUFFIX	DATE OF BIRTH	GENDER	DISTRICT	SCHOOL	ETHNICITY INDICATOR	RACE(E)	SSN	MATCH PROBABILITY
9772315785	Trainee	Anna	Jane		06/02/2002	FEMALE	227901	227901009	Non-Hispanic/Latino	Native Hawaiian/Other Pacific Islander	***-**-****	75
1362197327	Trainee	Annabelle	J.		01/01/2004	FEMALE	227901	227901009	Non-Hispanic/Latino	Native Hawaiian/Other Pacific Islander	***-**-****	73
3181156193	TRAN	ANN MARIE	T		10/26/1995	FEMALE	057909	057909000	Non-Hispanic/Latino	Asian	***-**-****	71

Providing additional search criteria may result in different search results and also impacts the match score that is displayed in the Match Probability column. The following examples illustrate how searching with or without a date of birth impacts the match probability.

**Search without a date of birth:** In the example below three results are returned and the **Match Probability** is 71-75.

BASIC SEARCH
ADVANCED SEARCH
ID SEARCH

---

First Name\*   
 Middle Name:   
 Last Name\*   
 Suffix:   
 Date Of Birth:

CLEAR
SEARCH

SEARCH RESULTS

UNIQUE ID	LAST NAME	FIRST NAME	MIDDLE NAME	SUFFIX	DATE OF BIRTH	GENDER	DISTRICT	SCHOOL	ETHNICITY INDICATOR	RACE(S)	SSN	MATCH PROBABILITY
9772315785	Trainee	Anna	Jane		06/02/2002	FEMALE	227901	227901009	Non-Hispanic/Latino	Native Hawaiian/Other Pacific Islander	■■■■■ ■■■	75
1362197327	Trainee	Annabelle	J.		01/01/2004	FEMALE	227901	227901009	Non-Hispanic/Latino	Native Hawaiian/Other Pacific Islander	■■■■■ ■■■	73
3181156183	TRAN	ANN MARIE	T		10/26/1995	FEMALE	057909	057909008	Non-Hispanic/Latino	Asian	■■■■■ ■■■	71

**Search with date of birth:** In the example below, by adding date of birth to the search criteria, an additional search result is returned and the **Match Probability** for the correct match is 94; this is a Match.

BASIC SEARCH
ADVANCED SEARCH
ID SEARCH

---

First Name\*   
 Middle Name:   
 Last Name\*   
 Suffix:   
 Date Of Birth:

CLEAR
SEARCH

SEARCH RESULTS

UNIQUE ID	LAST NAME	FIRST NAME	MIDDLE NAME	SUFFIX	DATE OF BIRTH	GENDER	DISTRICT	SCHOOL	ETHNICITY INDICATOR	RACE(S)	SSN	MATCH PROBABILITY
9772315785	Trainee	Anna	Jane		06/02/2002	FEMALE	227901	227901009	Non-Hispanic/Latino	Native Hawaiian/Other Pacific Islander	■■■■■ ■■■	94 [NEAR MATCH]
1362197327	Trainee	Annabelle	J.		01/01/2004	FEMALE	227901	227901009	Non-Hispanic/Latino	Native Hawaiian/Other Pacific Islander	■■■■■ ■■■	79
8993473121	SIMON	NEVAEH	TRANESE ANN		07/01/2007	FEMALE	101912	101912225	Non-Hispanic/Latino	Black or African American	■■■■■ ■■■	74
3181156183	TRAN	ANN MARIE	T		10/26/1995	FEMALE	057909	057909008	Non-Hispanic/Latino	Asian	■■■■■ ■■■	71



When a valid search is performed but there are no matches or only one near match below the upper near match threshold, the system displays the **Enter New Person** button (the display of the button is dependent upon your security profile).

The screenshot displays a search interface with three tabs: 'BASIC SEARCH' (selected), 'ADVANCED SEARCH', and 'ID SEARCH'. The form includes the following fields:

- First Name:\* (Text input: John)
- Middle Name: (Text input: empty)
- Last Name:\* (Text input: Pupil)
- Suffix: (Dropdown menu: empty)
- Date Of Birth: (Date picker: mm/dd/yyyy)

Below the form, there is a note: (\*) Required. To the right of this note are three buttons: 'CLEAR', 'SEARCH', and 'ENTER NEW PERSON'. The 'ENTER NEW PERSON' button is circled in red. Below the buttons, the text 'SEARCH RESULTS' is displayed, followed by 'No records found.'

To view more detailed information about the person when search results are returned, click the link in the **Last Name** or **First Name** column. Doing so opens the Search Individual Person information page.

The **Individual Person Information** page displays the person’s current information. The name of the person and related information are displayed in the Person Panel at the top of the page.

UNIQUE ID
John Reese, TEXAS EDUCATION AGENCY

Person Search - Individual Person Information ?

---

**John Reese**  
GENDER: MALE    DATE OF BIRTH: 02/15/1961    LOCAL ID: 12345    SSN: 402-15-1961    PERSON TYPE: Student

**3179816872**  
LAST UPDATED: 08/10/2015 13:12    ID CREATED: 08/10/2015 13:12

[MASTER RECORD](#)   [HISTORY](#)   [ASSOCIATED RETIRED IDs](#)   [ADD NOTE](#)

GENERAL INFORMATION

FIRST NAME	John
MIDDLE NAME	
LAST NAME	Reese
ALT LAST NAME	
SUFFIX	
GENDER	MALE
DATE OF BIRTH	02/15/1961
ETHNICITY INDICATOR	Non-Hispanic/Latino
ETHNICITY/RACE	White
RACE 2 CODE	
RACE 3 CODE	
RACE 4 CODE	
RACE 5 CODE	
SSN	402-15-1961
UNIQUE ID	3179816872

BATCH INFORMATION

LAST BATCH #	414425
LAST UPDATED	08/10/2015 13:12
UPDATE REFERENCE #	2291893
INPUT TYPE	Online
CREATED BY	michelle.banks
EMAIL ADDRESS - CREATED BY	michelle.banks@tea.state.tx.us
CREATED	08/10/2015 13:12
STATUS	New ID Assigned - No Matching Record Found
COMMENTS	

LOCATION / ENROLLMENT INFORMATION

GRADE LEVEL	Unknown
SCHOOL	00000000 TEXAS EDUCATION AGENCY
DISTRICT	000000 TEXAS EDUCATION AGENCY
RES DISTRICT	
SCHOOL YEAR	2015
LOCAL ID	12345
SOURCE SYSTEM	Default
ALTERNATE ID	
ALTERNATE SOURCE	
LAST UPDATED	08/10/2015 13:12
CREATED	08/10/2015 13:12

BACK TO SEARCH RESULTS
EDIT PERSON

The Individual Person Information page is referred to as the **Master Record**. The Person Panel also includes links to the **History** section and the **Associated Retired IDs** section.

UNIQUE ID HOME
John Reese, TEXAS EDUCATION AGENCY

Person Search - Individual Person Information ?

---

**Test Student**  
GENDER: FEMALE    DATE OF BIRTH: 04/17/2003    LOCAL ID: 12312    SSN: 348-65-6874    PERSON TYPE: Student

**3981591593**  
LAST UPDATED: 03/08/2016 16:01    ID CREATED: 09/27/2017 11:27

[MASTER RECORD](#)   [HISTORY](#)   [ASSOCIATED RETIRED IDs](#)   [ENROLLMENT](#)   [ADD NOTE](#)

The **History** section displays additional historical information about the person from any previous records that exist in the database.

The screenshot shows the 'UNIQUE ID HOME' interface. At the top, there is a navigation bar with 'UNIQUE ID HOME' and 'john.ross, TEXAS EDUCATION AGENCY'. Below this is a search bar with 'Person Search - Individual Person Information'. The main content area displays details for a 'Test Student' with ID '3981591593'. Key information includes: GENDER: FEMALE, DATE OF BIRTH: 04/17/2003, LOCAL ID: 12212, SSN: 348-55-5874, PERSON TYPE: Student, LAST UPDATED: 03/08/2018 16:01, and ID CREATED: 09/27/2017 11:27. There are tabs for 'MASTER RECORD', 'HISTORY', 'ASSOCIATED RETIRED IDs', and 'ENROLLMENT'. Below the tabs is a table with columns: LAST UPDATED, LAST NAME, FIRST NAME, MIDDLE NAME, SUFFIX, DATE OF BIRTH, GENDER, LEA, CAMPUS, ETHNICITY INDICATOR, RACE(S), and SSN. A single row of data is visible: 09/27/2017 11:27, Student, Test, , , 04/17/2003, FEMALE, 101912, 101912001, Hispanic/Latine, Black or African American, 348-55-5874. A 'BACK TO SEARCH RESULTS' button is located at the bottom right of the table area.

The **Associated Retired IDs** section displays any IDs along with the person information that have been retired and associated to the ID under review.

- You can view additional information, edit the person, return to the search results, or return to the home page.

Search Input Record

PERSON INFORMATION [ REFERENCE NO : 476713 ]

GENERAL INFORMATION		ENROLLMENT INFORMATION	
FIRST NAME	Anna	GRADE	10
MIDDLE NAME	Jane	SCHOOL	227901-227901009 ANDERSON H S
LAST NAME	Trane	DISTRICT	227901
ALT LAST NAME		REG DISTRICT	
SUFFIX		SCHOOL YEAR	2014
SEX	FEMALE	LOCAL ID	101010
DATE OF BIRTH	06/02/2002	COURSE SYSTEM	818
ETHNICITY INDICATOR	Non-Hispanic/Latino	ALTERNATE ID	
ETHNICITY/RACE	Native Hawaiian/Other Pacific Islander	ALTERNATE SOURCE	
RACE 2 CODE			
RACE 3 CODE			
RACE 4 CODE			
RACE 5 CODE			
SSN	481081889		
UNIQUE ID	972515765		

BATCH INFORMATION	
BATCH NUMBER	1426
LAST UPDATED	06/09/2016 14:45
BATCH TYPE	Batch
CREATED BY	Kay Robert
EMAIL ADDRESS - CREATED BY	kay.robert@tea.state.tx.us
CREATED	06/09/2016 14:45
STATUS	NEW ID ASSIGNED - NO MATCHING RECORD FOUND
PROCESSED DATE	06/09/2016 14:45
COMMENTS	

CLOSE WINDOW

See Appendix B for the possible statuses that a batch record may have.

## Editing a Person Record

The **Person Search** module also contains a feature that allows you to edit person records without performing a formal submission for ID assignment (that is, uploading a person batch file). The ability to edit a person is dependent on the following:

You have the rights to edit persons. An administrator can give your role the rights to edit persons with the **Security Manager** module.

### AND

The person is in your district or school. If you have the role of Unique ID LEA, the person has to be in your LEA. If you who have the role of Unique ID Campus, the person has to be in the your school.

To edit a person, perform the following steps:

1. Perform a search as described above.
2. Click **Edit Person** on the **Search Individual Person** results page.

Edit Person Information ?

*Edit Person Record - Any corrections to data should also be made in your local person information system.*

GENERAL INFORMATION		ENROLLMENT INFORMATION	
FIRST NAME *	Anna	GRADE LEVEL *	10
MIDDLE NAME	Jane	SCHOOL *	227901009
LAST NAME *	Trainee	DISTRICT *	227901
ALT LAST NAME		RES DISTRICT	
SUFFIX		SCHOOL YEAR *	2014
GENDER *	FEMALE	LOCAL ID *	101010
DATE OF BIRTH *	06 / 02 / 2002	SOURCE SYSTEM *	SIS
ETHNICITY INDICATOR *	Non-Hispanic/Latino	ALTERNATE ID	
ETHNICITY/RACE *	Native Hawaiian/Other Pacific Islander	ALTERNATE SOURCE	
RACE 3 CODE			
RACE 3 CODE			
RACE 4 CODE			
RACE 5 CODE			
SSN *			

(\*) Required

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

**Note:** Edit Person may not be enabled.

3. Review the **Edit Person** page. This page displays the person record and allows you to make corrections/additions to the information.
4. Update information as necessary. **School** and **District** are not editable, but all other fields can be updated.
5. To save the changes, click **Update Person Record**.

To cancel the changes, click **Back to Person Information**.

Similar to the way the system validates data in the Enter Individual Person module, the application validates any changes made to the person’s information in the edit person module. If a value is invalid, the system displays the following page:

If the changes pass validation, the application displays a message stating that the record has been updated. It also includes the batch number and information on how to download the updated record, as illustrated in the screenshot below:

The screenshot shows the 'Edit Person Information' page. At the top, a yellow banner contains a message: 'The person record has been updated. Batch: 1426. You can download this information using Extract & Download.' Below this, a sub-header reads 'Edit Person Record - Any corrections to data should also be made in your local person information system.' The page is divided into two main sections: 'GENERAL INFORMATION' and 'ENROLLMENT INFORMATION'. The 'GENERAL INFORMATION' section includes fields for First Name (Anna), Middle Name (Jane), Last Name (Trainee), Gender (FEMALE), Date of Birth (06/02/2002), Ethnicity (Non-Hispanic/Latino), and Race (American Indian or Alaska Native). The 'ENROLLMENT INFORMATION' section includes fields for Grade Level (10), School (227501009), District (227501), School Year (2014), and Local ID (101010). At the bottom right, there are two buttons: 'BACK TO PERSON INFORMATION' and 'UPDATE PERSON RECORD'.

For every person record that is edited, the application generates a batch number for that change. Batches generated via this feature always contain one record and the status for that one record is always be “Person Updated and History Created - Direct Edit.” In addition, you can download the record they updated in the download batch module.

## Adding Person Notes

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

- Search Individual Person Detail Results
- Near Match Review

**NOTE:** The Person Notes are viewable by users with authorization. Person Notes can only be added and viewed. They cannot be updated or deleted. The system contains Administrator and General notes. Administrator notes are visible only to Administrators while General notes are viewable by anyone with authorization to view general notes.

To add person notes from the **Person Search** component, perform the following steps:

1. Click the **Person Search** link on the **Menu**.
2. Search for a person as described above.
3. Click the hyperlinked **Last Name** or **First Name** to view the search details. The **Person Search** information page appears.
4. Click **Add Note**.

PERSON INFORMATION (UNIQUE ID : 9772315785) CREATED 06/09/2016 14:45

[ADD NOTE](#)

GENERAL INFORMATION		ENROLLMENT INFORMATION	
FIRST NAME	Anna	GRADE LEVEL	10
MIDDLE NAME	Jane	SCHOOL	227501009 ANDERSON H S
LAST NAME	Trainee	DISTRICT	227501 AU STIN ISD

5. The **Add Person Note** page appears. This page allows up to 255 characters of text. Enter note text.

Add Person Note

GENERAL NOTE (UNIQUE ID: 9772315785)

NOTE TEXT*	(maximum length 255 characters)
------------	---------------------------------

(\*) Required

[BACK](#) [SAVE](#)

6. Click **Save**.
7. A confirmation page is displayed allowing you to view the note that was added.
8. Click **Back** to return to the Individual Person Information page.

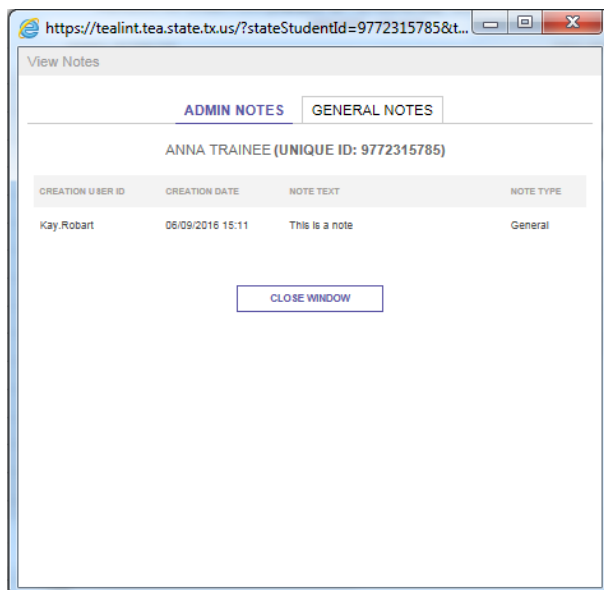
Person notes can be added throughout the application where the **Add Note** link exists.

## Viewing Person Notes

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

1. Search for a person as described above.
2. Click the hyperlinked **Last Name** or **First Name** to view the search details. Upon clicking the hyperlinks, the **Person Search** information page is displayed.
3. If notes have been added, **View Note** appears beneath the Person Information and ID in the top row of the details. Click **View Note**.

A new dialog box displays the available notes for the person. The system provides information on the user ID, creation date, the text of the note and the note type.





## Batch Search

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

This feature allows you to:

- Search for students within a batch file and download results of the search
- View previous batch search results
- Extract and download results of a batch search

**Note:** In this module, the application searches against the current information for people who have been assigned a Unique ID. Although a Batch Search performs a similar search to the ID Assignment search, it is not exactly the same and may produce different results.

### Searching for Persons within a Batch File

The **Batch Search** feature requires that a TSDS Unique ID person file is uploaded into the system. The format and structure of the search file are exactly the same as the person batch file format, but only first name and last name are required. However, if more information is provided, there is a better chance of the system finding a matching person. 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. Batch search includes basic search and an advanced search capability, along with the ability to download the results. An example of when you may choose to use batch search instead of person search is:

If you only want to assign Unique IDs once a week, you could send the file of all students/staff that have not been assigned a Unique ID as opposed to entering them one by one through the **Enter Individual Person** option. Files that are uploaded via the **Batch Search** process go through the same logic, as if you are adding a person via the **Enter Individual Person** menu option.

To search for persons using a batch file, perform the following steps:

1. Click the **Batch Search** link on the **Menu**.
2. Click **Upload Batch File** and upload the file.
3. Click on the **Basic** or **Advanced** tab based on the search to be performed.

## Basic Batch Search

Upload Search File ?

---

**BASIC**   **ADVANCED**

---

File to Upload \*:  **BROWSE**

---

(\*) Required **UPLOAD**

## Advanced Batch Search

**BASIC**   **ADVANCED**

---

Template \*:

File to Upload \*:  **BROWSE**

Delimiter \*:

Qualifier:

Source System:

Ignore First Row:  Yes    No

Filters:  LEA    CAMPUS    GRADE LEVEL    DATE OF BIRTH  
 SCHOOL YEAR

---

**UPLOAD**

1. Click **Browse** and select the file from your desktop; complete the upload form as necessary.

For **Advanced** batch search, you must select the **Delimiter**, **Qualifier**, **Source System**, the Ignore First Row option (always select **No**), and you may select one or more of the Filters checkboxes.

The **Filters** capability removes matches from the results where the selected field does not match the potential match. This capability allows you to select one or many filters to apply to the batch search, and if the submission record does not match the values for those fields to the master record, the record is not returned as a match. The application applies filters with an “or” condition, so if multiple filters are selected and only one of the values is different between the master and the submission record, it is a no match. For example, if the **District** and **School** filters are applied to a batch search, which includes Jonathan Student in district 105802 and school 041, and the system finds a

Jonathan Student record in district 227901 and school 016 as a match, the 227901 record is filtered out of the results and is not returned as a match.

2. Click **Upload**.

The system analyzes the file, similar to the process described in the **File Upload** section above and display any file errors.

If a file error is found during the processing, click **Upload New File** submit a new file.

**NOTE:** If the system is interrupted (e.g., connectivity is lost to the database) while it is doing search validation, the batch returns a message. The process can be restarted by clicking **Continue Validation** 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, click **Continue Validation**.

The system displays the **Batch Search** page once the file validation is complete. This page displays the following information related to the file uploaded: **Date** the file is uploaded, the batch number in the **Batch Info** column, **Status**, **Number of Records** and the **Next Action**.

3. Click the **Validate** to validate the data included in the batch search submission.

Batch Search ?

UPLOAD BATCH FILE
EXTRACT & DOWNLOAD BATCH

FILTER

PROCESSING STAGE: All v

FROM: 04/26/2016 📅 TO: 06/10/2016 📅 BATCH NUMBER:  

FILTER RESULTS

DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
06/10/2016 14:10	Search	1444	227901	AAA	SIS	Search Validation is in progress.	In Progress of 3	
06/10/2016 14:10	Search	1443	227901	AAA	SIS	File Uploaded. Begin Validation Stage	3 of 3	<span style="background-color: #4a5568; color: white; padding: 5px 10px; border-radius: 3px;">VALIDATE</span>
06/10/2016 14:03	Search	1441	227901	AAA	SIS	File Uploaded. Begin Validation Stage	3 of 3	<span style="background-color: #4a5568; color: white; padding: 5px 10px; border-radius: 3px;">VALIDATE</span>
06/09/2016 15:19	Search	1428	227901	AAA	SIS	File Uploaded. Begin Validation Stage	10 of 10	<span style="background-color: #4a5568; color: white; padding: 5px 10px; border-radius: 3px;">VALIDATE</span>

Displaying 1 - 4 of 4

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

If any data errors are found during validation, the records containing the data errors are auto-canceled. Those records are not included in the rest of the search process.

The records in the batch also auto-cancel if they include the ID.

The system returns to the **Batch Search** page displaying the status of the process:

Batch Search ?

---

FILTER

PROCESSING STAGE:    
 FROM:    
 TO:    
 BATCH NUMBER:

---

DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
06/10/2016 14:10	Search	1444	227901	AAA	SIS	Search validation complete. Ready to begin search.	2 of 3	<input type="button" value="SEARCH"/>

- Click **Search** to perform the search. If **Search** is not visible, click **Filter Results** to refresh the page.
- The system returns to the **Batch Search** page, displaying the status of the process, along with the **Batch Information** button. The result for each record in the process is one of the following:

No matching persons: The **Home** column is blank for these types of records in the downloaded file.

A single matching person: The **Home** column contains the Home of the matching person for these types of records in the downloaded file.

Multiple matching persons: The record is auto-canceled and is not listed in the downloaded file.

One or more near matching persons: The record is auto-canceled and is not listed in the downloaded file.

**Note:** During a search, the TSDS Unique ID system auto-cancels any record having multiple matching persons or at least one near matching person. However, all records auto-canceled during a batch search are available for download. This file includes a listing of all of the potential match Homes in the comments column. Please see Extracting & Downloading Batch Search Files at the end of this section for further instructions.

- Click **Download** to download the file. If the **Download** button is not visible, click **Filter Results** to refresh the page.

Batch Search ?

[UPLOAD BATCH FILE](#)    [EXTRACT & DOWNLOAD BATCH](#)

---

FILTER

PROCESSING STAGE:    
 FROM:    
 TO:    
 BATCH NUMBER:    
[FILTER RESULTS](#)

DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
06/10/2016 14:10	Search	1444	227901	AAA	SIS	Download Search results	2 of 3	<a href="#">DOWNLOAD</a>

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

Batch Search - Download ID Batch

UPLOAD DATE	BATCH INFO	STATUS	RECORD COUNT	NEXT ACTION
06/10/2016 14:10	1444	File Extract Complete.	2	<a href="#">DOWNLOAD</a>

[BACK TO BATCH SEARCH](#)

- The format of the downloaded file is exactly the same as the Person Batch File and each person record includes the Home that was assigned to that person.

## Viewing Previous Batch Searches

All batch searches submitted are displayed on the **Batch Search** home page. The page can be filtered by a specific date range or **Processing Stage** to narrow down the results list. To filter the results, select the appropriate date range or **Processing Stage**. Once the selections are made, click **Filter Results**.

FILTER

PROCESSING STAGE:    
 FROM:    
 TO:    
 BATCH NUMBER:    
[FILTER RESULTS](#)

DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
06/10/2016 14:10	Search	1444	227901	AAA	SIS	Download Search results	2 of 3	<a href="#">DOWNLOAD</a>

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

## Extracting & Downloading Batch Search Files

The **Extract & Download** functionality available within the **Batch Search** component is specifically designed to extract and download the results of Batch Search files.

To perform an extract and download within the **Batch Search** component, click **Extract & Download** on the **Batch Search** page.

The screenshot shows the 'Batch Search' interface. At the top right, there are two buttons: 'UPLOAD BATCH FILE' and 'EXTRACT & DOWNLOAD BATCH'. Below these is a 'FILTER' section with the following fields: 'PROCESSING STAGE' (set to 'Download'), 'FROM' (06/08/2016), 'TO' (06/10/2016), and 'BATCH NUMBER'. A 'FILTER RESULTS' button is to the right. Below the filter section is a table with the following data:

DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
06/10/2016 14:10	Search	1444	227901	AAA	SIS	Download Search results	2 of 3	DOWNLOAD

At the bottom, there is a pagination bar showing 'Displaying 1 - 1 of 1' and navigation links: '<< FIRST', '< PREV', 'PAGE 1 OF 1', 'NEXT >', and 'LAST >>'.

The filters for Extract & Download Batch specific to the **Batch Search** are available as follows:

- **Submission Type:** The only option for this page is **Search**.
- **Extract Type:** The options are **IDs Found – Search**, **IDs Canceled – Search**, and **Rejected**
- **Sort:** By **Upload Date** or **Batch Number**
- **From/To:** Enter a specific date range to filter the results.

The screenshot shows the 'Batch Search - Extract and Download Batch' interface. The filter section is circled in red and includes: 'SUBMISSION TYPE' (Search), 'EXTRACT TYPE' (IDs Found - Search), 'FROM' (04/26/2016), 'TO' (06/10/2016), and 'SORT' (Upload Date Desc). A 'FILTER RESULTS' button is to the right. Below the filter section is a table with the following data:

UPLOAD DATE	BATCH INFO	STATUS	RECORD COUNT	NEXT ACTION
06/10/2016 14:10	1444	IDs Found - Search	2	EXTRACT RECORDS, ADD TO DOWNLOAD CART

At the bottom, there is a pagination bar showing 'Displaying 1 - 1 of 1' and navigation links: '<< FIRST', '< PREV', 'PAGE 1 OF 1', 'NEXT >', and 'LAST >>'. Below the pagination bar are two buttons: 'BACK TO BATCH SEARCH' and 'VIEW DOWNLOAD CART'.

A single file batch file can be downloaded by clicking **Extract Records** or multiple files can be combined by clicking **Add to Download Cart**.

When you click **Extract Records**, the file download page allows you to download the file by clicking **Download**. Clicking **Extract Another Batch** opens the **Extract & Download Batch** page again.

## Download Batch

You can download files related to the TSDS Unique ID system by clicking the **Download Batch** link in the menu:

This module allows you to:

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

**Note:** The ability to extract and download batches is dependent on your security profile. If the security profile does not permit you to perform this function, then the **Download Batch** link does not appear.

### Filtering the List of Downloads

All file downloads in this module pertain to the ID assignment process. Below is a list of the five types of downloads available, each are by batch:

- **IDs Assigned** – includes all of the submission records with the assigned Home Identifiers for the batch.
- **Near Matches** – includes all of the submission records in the near match stage for the batch.
- **Canceled** - includes all of the submission records that were canceled for the batch.
- **Rejected** – includes all of the submission records that were rejected for the batch.
- **Near Match Details** – includes all of the submission records in the near match stage along with any matched records in the batch.

**Note:** Errors to Fix and Fixed Records also appear in the Extract Type dropdown, but these are not applicable to TSDS Unique ID.

To filter results displayed on the Extract & Download Batch page, perform the following:

1. Click **Batch** link under **Download** on the menu.
2. Select filter criteria. The following filters are available:
  - **Submission Type:** The options are All, File, Online, SLF, Edit, Web Service, or Automation. (Only **All**, **File** and **Online** are applicable for TSDS Unique ID)
  - **Extract Type:** The options are **IDs Assigned**, **Errors to Fix**, **Near Matches**, **Canceled**, **Rejected**, or **Fixed Records**. (Although **Fixed Records** is displayed, it is not applicable for TSDS Unique ID.)
  - **Sort:** By **Upload Date** or **Batch Number**
  - **From/To:** To specify date range
3. Click **Filter Results**.

Extract and Download Batch ?

FILTER

DISTRICT: AUSTIN ISD [ 227901 ] ▼

SCHOOL:

SUBMISSION TYPE: File ▼

EXTRACT TYPE: IDs Assigned ▼

FROM: 04/26/2016 📅

TO: 06/10/2016 📅

SORT: Upload Date Desc ▼

**FILTER RESULTS**

UPLOAD DATE	BATCH INFO	DISTRICT	SCHOOL	STATUS	RECORD COUNT	NEXT ACTION
06/09/2016 14:45	1425	227901	AAA	ID(s) Assigned.	2	<div style="display: flex; justify-content: space-between;"> <span>EXTRACT RECORDS</span> <span>ADD TO DOWNLOAD CART</span> </div>
06/09/2016 14:05	1422	227901	AAA	ID(s) Assigned.	6	<div style="display: flex; justify-content: space-between;"> <span>EXTRACT RECORDS</span> <span>ADD TO DOWNLOAD CART</span> </div>
06/09/2016 13:28	1419	227901	AAA	ID(s) Assigned.	8	<div style="display: flex; justify-content: space-between;"> <span>EXTRACT RECORDS</span> <span>ADD TO DOWNLOAD CART</span> </div>
06/09/2016 11:36	1415	227901	AAA	ID(s) Assigned.	9	<div style="display: flex; justify-content: space-between;"> <span>EXTRACT RECORDS</span> <span>ADD TO DOWNLOAD CART</span> </div>
06/09/2016 11:15	1408	227901	AAA	ID(s) Assigned.	5	<div style="display: flex; justify-content: space-between;"> <span>EXTRACT RECORDS</span> <span>ADD TO DOWNLOAD CART</span> </div>
06/09/2016 10:30	1403	227901	AAA	ID(s) Assigned.	3	<div style="display: flex; justify-content: space-between;"> <span>EXTRACT RECORDS</span> <span>ADD TO DOWNLOAD CART</span> </div>

Displaying 1 - 6 of 6 << FIRST < PREV PAGE 1 OF 1 NEXT > LAST >>

**VIEW DOWNLOAD CART**

4. Once the filters are applied, proceed to the **Downloading a File** instructions below.
5. You can also get details about the submission the download is for by clicking the button in the **Batch Info** column. For more information about this refer to Appendix A.



## Downloading a Single File

The system allows you to download a single file from the Extract & Downloads component. To download a single file, do the following:

1. Perform steps 1 through 5 from the “Filtering the List of Downloads” section.
2. Click **Extract Records** for the appropriate batch.

UPLOAD DATE	BATCH INFO	DISTRICT	SCHOOL	STATUS	RECORD COUNT	NEXT ACTION
06/09/2016 14:45	1425	227901	AAA	ID(s) Assigned.	2	<a href="#">EXTRACT RECORDS</a> <a href="#">ADD TO DOWNLOAD CART</a>

3. Download the file by clicking the **Download**. Doing so opens a file download dialogue box that enables you to either open the file or save it to your local computer.
4. To extract another batch, click **Extract Another Batch**.

## Downloading Multiple Files

To download multiple files, perform the following steps:

Perform steps 1 through 5 from the above

1. Filtering the List of Downloads section.
2. Click **Add to Download Cart** for the appropriate batch.

UPLOAD DATE	BATCH INFO	DISTRICT	SCHOOL	STATUS	RECORD COUNT	NEXT ACTION
06/09/2016 14:45	1425	227901	AAA	ID(s) Assigned.	2	<a href="#">EXTRACT RECORDS</a> <a href="#">ADD TO DOWNLOAD CART</a>

3. The system displays the **Download Cart** page listing all batches in the cart. For each batch in the list, the **Upload Date**, **Batch Number**, and **Record Count** is displayed. You can also download the files in the cart, download with options, return to the Extract & Download page, remove selected records from the cart, and clear the cart.

### Download Cart - IDs Assigned Extract Type

UPLOAD DATE	BATCH INFO	RECORD COUNT
<input type="checkbox"/> 06/09/2016 14:45	1425	2

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

4. To continue adding batches to the cart, click **Back to Extract & Download**.

5. Repeat steps 1 through 4 as necessary until all files are added to the cart.
6. Click **Download Cart** to generate the download file.
7. Download the file by clicking **Download Cart**. Doing so opens a File Download dialogue box that enables you to either open the file or save it to your local computer.

Download Cart - IDs Assigned Extract Type		
UPLOAD DATE	BATCH INFO	RECORD COUNT
<input type="checkbox"/> 06/09/2016 14:05	1422	6
<input type="checkbox"/> 06/09/2016 14:45	1425	2

-----

## Download with Options

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

1. Click **Download With Options** on the **Download Cart** page.
2. The **Download Options** page displays the available selections in a form, allowing you to select specific download options.

Download - Location

DOWNLOAD OPTIONS

Template: eScholar Uniq-ID® v3.0

Delimiter: TAB

Qualifier:

Date Format: mm/dd/yyyy

Include Header/Footer:  Yes  No

(\*) Required

The following options are available:

- **Template:** eScholar Unique ID® v1.0, eScholar Unique ID® v2.0, or eScholar Unique ID® v2.1 (only eScholar Unique ID® v3.0 is supported by the TSDS Unique ID system)
- **Field Delimiter:** The options for this selection are **Tab** and **Comma**.
- **Field Qualifier:** The options for this selection are “ and ‘.
- **Date Format:** The options for this selection are:
  - mm/dd/yyyy
  - mm/d/yyyy
  - ISO YYYY-MM-DD
  - m/d/yyyy
  - m/dd/yyyy

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

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

3. Click **Download**.

## Removing Batches from the Download Cart

To remove individual batches from the cart, select the checkboxes to the left of the batch and then click **Remove Selected**.

Download Cart - IDs Assigned Extract Type		
UPLOAD DATE	BATCH INFO	RECORD COUNT
<input checked="" type="checkbox"/> 06/09/2016 14:05	1422	6
<input type="checkbox"/> 06/09/2016 14:45	1425	2

BACK TO EXTRACT & DOWNLOAD   CLEAR CART   REMOVE SELECTED   DOWNLOAD WITH OPTIONS   DOWNLOAD CART

To remove all batches from the cart, click **Clear Cart**.

Download Cart - IDs Assigned Extract Type		
UPLOAD DATE	BATCH INFO	RECORD COUNT
<input type="checkbox"/> 06/09/2016 14:05	1422	6
<input type="checkbox"/> 06/09/2016 14:45	1425	2

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

## Viewing the Download Cart

From the **Extract and Download Batch** main page click **View Download Cart**.

Extract and Download Batch ?

FILTER ▲

DISTRICT:  SCHOOL:

SUBMISSION TYPE:  EXTRACT TYPE:  FROM:  TO:  SORT:  [FILTER RESULTS](#)

UPLOAD DATE	BATCH INFO	DISTRICT	SCHOOL	STATUS	RECORD COUNT	NEXT ACTION
06/09/2016 14:45	1425	227901	AAA	ID(s) Assigned.	2	<a href="#">EXTRACT RECORDS</a> <a href="#">ADD TO DOWNLOAD CART</a>
06/09/2016 14:05	1422	227901	AAA	ID(s) Assigned.	6	<a href="#">EXTRACT RECORDS</a> <a href="#">ADD TO DOWNLOAD CART</a>
06/09/2016 13:28	1419	227901	AAA	ID(s) Assigned.	8	<a href="#">EXTRACT RECORDS</a> <a href="#">ADD TO DOWNLOAD CART</a>
06/09/2016 11:36	1415	227901	AAA	ID(s) Assigned.	9	<a href="#">EXTRACT RECORDS</a> <a href="#">ADD TO DOWNLOAD CART</a>
06/09/2016 11:15	1408	227901	AAA	ID(s) Assigned.	5	<a href="#">EXTRACT RECORDS</a> <a href="#">ADD TO DOWNLOAD CART</a>
06/09/2016 10:30	1403	227901	AAA	ID(s) Assigned.	3	<a href="#">EXTRACT RECORDS</a> <a href="#">ADD TO DOWNLOAD CART</a>

Displaying 1 - 6 of 6 
[<< FIRST](#)
[< PREV](#)
PAGE 1 OF 1
[NEXT >](#)
[LAST >>](#)

[VIEW DOWNLOAD CART](#)

The **Download Cart** page appears:

Download Cart - IDs Assigned Extract Type		
UPLOAD DATE	BATCH INFO	RECORD COUNT
<input type="checkbox"/> 06/09/2016 14:05	1422	6
<input type="checkbox"/> 06/09/2016 14:45	1425	2

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

## Download by Location

The **Download by Location** component allows you to download all of the persons from a specific district or school, rather than by batch. This component is only available to authorized users and is restricted only to the locations to which they have access.

With this feature, you can:

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

### Searching for a Location

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

1. Click **Location** under **Download** from the menu.

The screenshot shows the 'Download - Location' interface. At the top, there is a search filter section with the text 'FILTER' and 'SEARCH BY CODE OR NAME'. Below this is a search input field and a 'SEARCH' button. The main content is a table with four columns: 'DISTRICT', 'SCHOOL', 'SCHOOL NAME', and 'NEXT ACTION'. The table lists ten rows of data, each with a 'DOWNLOAD' button in the 'NEXT ACTION' column. At the bottom of the table, there is a pagination bar showing 'Displaying 1 - 10 of 204' and navigation links: '<< FIRST', '< PREV', 'PAGE 1 OF 21', 'NEXT >', and 'LAST >>'.

DISTRICT	SCHOOL	SCHOOL NAME	NEXT ACTION
227901	227901000	AUSTIN ISD-AUSTIN ISD	DOWNLOAD
227901	227901002	AUSTIN ISD-AUSTIN H S	DOWNLOAD
227901	227901003	AUSTIN ISD-JOHNSTON H S	DOWNLOAD
227901	227901004	AUSTIN ISD-LANIER H S	DOWNLOAD
227901	227901005	AUSTIN ISD-MCCALLUM H S	DOWNLOAD
227901	227901006	AUSTIN ISD-REAGAN H S	DOWNLOAD
227901	227901007	AUSTIN ISD-TRAVIS H S	DOWNLOAD
227901	227901008	AUSTIN ISD-CROCKETT H S	DOWNLOAD
227901	227901009	AUSTIN ISD-ANDERSON H S	DOWNLOAD
227901	227901010	AUSTIN ISD-JOHNSON H S	DOWNLOAD

The system displays a list of districts and locations or schools for which you have access.

The search feature allows you to search by the district code, school code, or agency name (for example, school name).

2. Enter the text to search for in the Search form.
  - When you enter a *number* into the search form, the system searches for all of the districts and schools with that code.
  - When you enter *partial numbers* into the search form, the system searches for all of the districts and schools with that partial number.
  - When you enter *text*, the system searches for all of the agency names matching the search phrase.
3. Click **Search**.
4. The system displays the results.
5. Proceed to the **Downloading Persons by Location** section below.

## Downloading Persons by Location

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

1. Follow steps 1 through 5 above.
2. Click **Download** for the location to be extracted. The system displays a **Download Options** page.

Download - Location

DOWNLOAD OPTIONS

Template: eScholar Uniq-IDB v3.0

Delimiter: TAB

Qualifier:

Date Format: mm/dd/yyyy

Include Header/Footer:  Yes  No

(\*) Required

BACK DOWNLOAD

3. The **Download Options** page displays the available options in a form, allowing you to select specific download options. The step for Downloading with Options for Download by Location is the exact same as the **Extract & Download - Download with Options** section above. You can select from the following options:

- **Template:** eScholar Unique ID® v1.0, eScholar Unique ID® v2.0, or eScholar Unique ID® v2.1 (only **eScholar Unique ID® v3.0** is applicable for the TSDS Unique ID system)
  - **Field Delimiter:** The options for this selection are **Tab** or **Comma**.
  - **Field Qualifier:** The options for this selection are “ and ‘.
  - **Date Format:** The options for this selection are:
    - mm/dd/yyyy
    - mm/d/yyyy
    - ISO YYYY-MM-DD
    - m/d/yyyy
    - m/dd/yyyy
  - **Include Header/Footer:** The options for this selection are **Yes** and **No**. When **No** is selected, the header and footer are not be included in the extracted file.
4. Select the appropriate download options.
  5. Click **Download**.
  6. The **Download by Location** download page appears. Click **Download**.

Download - **Location**

UPLOAD DATE	BATCH INFO	STATUS	RECORD COUNT	NEXT ACTION
		File Extract Complete.	2	<a href="#">DOWNLOAD</a>

---

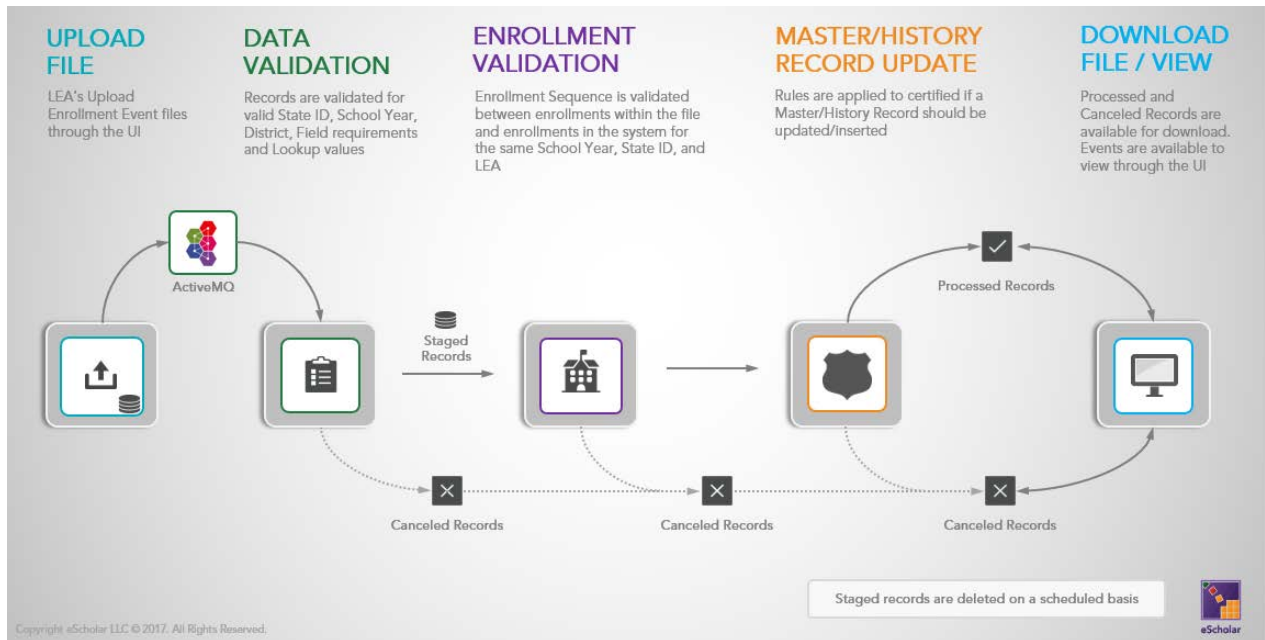
[EXTRACT ANOTHER LOCATION](#)

7. Click **Extract Another Location** to return to the Download By Location page or click **Home** to return to the system home page.

## Enrollment Events

Enrollment events can be added in UID to capture information such as Entry/Exit Dates and Entry/Exit Types. This information can be used during the Near Match Resolution process or to assist in the research of students who were enrolled in a location but that have not enrolled in the location during the current school year.

The diagram below provides an overview of the data flow and the main components.



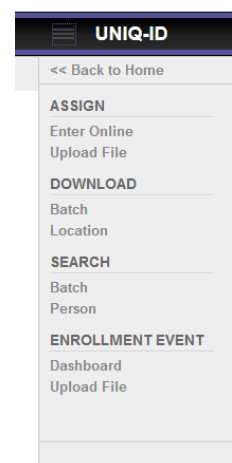
### Upload Enrollment Events

LEA users can upload enrollment events through the Enrollment Event – Upload File component. This component is accessible through the Main Menu for all Unique ID user roles excluding Unique ID Search and Web Services accounts.

**File Layout:** eScholar UID File Format 3.0

**Submission Purpose:** 002 – Enrollment Events

When the file is uploaded a batch # is provided to the user and the file is visible through the Enrollment Event Dashboard while it processes.





The screenshot shows the 'UNIQUE ID HOME' header with the user 'john.roose1, TEXAS EDUCATION AGENCY'. Below the header is the page title 'Enrollment Event- Upload File' and a help icon. The main content area has a tab labeled 'ENROLLMENT EVENT'. Underneath, there is a 'File to Upload \*:' label, a 'Choose File' input field, and a 'BROWSE' button. At the bottom right, there is a 'PROCESS FILE' button. A dashed line separates the main content from the footer, which contains a note: '(\*): Required'.

**Note:** Concurrent files from the same LEA will not be processed at the same time. A file will be sent back to the queue if a different file is running for the same LEA and will be processed at a later time.

## Validate Events

When you load a batch, your Enrollment Event files are automatically validated in four different stages: File Validation, Data Validation, Enrollment Sequence Validation, and the Master/History Record Update Validation.

### File Validation

A batch file is updated to rejected status if:

- A file has an incorrect header
- A file has an incorrect record layout
- A file has an incorrect footer
- A file has records for an unauthorized LEA

### Data Validation

Data is validated for submission purpose 002 – Enrollment Events. Any records without Submission Purpose 002 are automatically canceled.

A record is also canceled if:

- Unique ID is invalid, retired, or not present
- School Year is invalid
- Field requirements are not met
- Lookup codes are invalid or inactive
- Data Type is invalid

Canceled records are added to the Canceled group of records that are available for user download once the file completes processing. All canceled records include a canceled status and the reason they were canceled within the file.

## **Enrollment Sequence Validation**

The Enrollment Sequence Validation ensures that an Entry event exists before a Withdrawal event is added for the same Unique ID, LEA/Campus, and School Year.

The process builds a complete enrollment sequence per student within the file and validates against the existing enrollment events in the system table. If the proper enrollment sequence does not exist, then all the enrollment records in the file for the affected Unique ID are canceled. When there is a proper sequence of enrollment events, the record moves to the next validation stage.

Additionally, duplicate events are identified in this stage and tagged as such.

## **Master/History Update Validation**

### **Master Record Ownership Switch –**

The Master Record is updated to reflect the latest enrollment entry event information which can include changes to LEA, Campus, Grade Level, Local ID and school year.

When the master record is updated through this process, an ‘Event Added – Master Record Updated’ status is associated with the master record.

## **Monitor Batch Progress**

Users can monitor Enrollment Event Files through the Enrollment Event Dashboard. The Dashboard is accessible through the Main Menu. The Event Dashboard includes all files that have passed the File Validation stage. It includes filtering options to allow users to find the batch they are looking for with ease. LEAs will only be able to see batches for their own LEA.

The Enrollment Event Dashboard also allows you to drill down to more detailed information on each individual batch via the Batch Info pop-up. You can access the Batch Info pop-up by clicking the hyperlinked number for a batch.

UNIQUE ID HOME
john.reese1, TEXAS EDUCATION AGENCY

Enrollment Events - Dashboard ?

---

FILTER

LEA  
TEXAS EDUCATION AGENCY [ 000000 ]

CAMPUS

BATCH NUMBER

SUBMISSION TYPE  
ALL

PROCESSING STAGE  
All

FROM  
02/24/2018

TO  
04/11/2018

SORT  
Upload Date Desc

**FILTER RESULTS**

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	LOCATION	BUILDING	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
04/02/2018 09:25	File	1167	000000	AAA	SIS	Batch does not contain any records to process	0 of 1	<a href="#">DOWNLOAD</a> <span style="float: right; font-size: x-small;">⚙️</span>
03/27/2018 10:51	File	1085	000000	AAA	SIS	Rejected	0 of 0	<a href="#">DOWNLOAD</a> <span style="float: right; font-size: x-small;">⚙️</span>
03/27/2018 10:36	File	1084	000000	AAA	SIS	Batch does not contain any records to process	0 of 1	<a href="#">DOWNLOAD</a> <span style="float: right; font-size: x-small;">⚙️</span>
03/27/2018 08:35	File	1068	000000	AAA	SIS	Batch does not contain any records to process	0 of 1	<a href="#">DOWNLOAD</a> <span style="float: right; font-size: x-small;">⚙️</span>
03/27/2018 08:34	File	1067	000000	AAA	SIS	Rejected	0 of 0	<a href="#">DOWNLOAD</a> <span style="float: right; font-size: x-small;">⚙️</span>
03/27/2018 08:32	File	1066	000000	AAA	SIS	Batch does not contain any records to process	0 of 1	<a href="#">DOWNLOAD</a> <span style="float: right; font-size: x-small;">⚙️</span>
03/27/2018 07:21	Online	1060	000000	AAA	SIS	Event Creation Complete	1 of 1	<a href="#">DOWNLOAD</a> <span style="float: right; font-size: x-small;">⚙️</span>
03/26/2018 18:59	File	1048	000000	AAA	SIS	Rejected	0 of 0	<a href="#">DOWNLOAD</a> <span style="float: right; font-size: x-small;">⚙️</span>
03/26/2018 18:58	File	1047	000000	AAA	SIS	Batch does not contain any records to process	0 of 1	<a href="#">DOWNLOAD</a> <span style="float: right; font-size: x-small;">⚙️</span>
03/26/2018 18:54	File	1046	000000	AAA	SIS	Batch does not contain any records to process	0 of 1	<a href="#">DOWNLOAD</a> <span style="float: right; font-size: x-small;">⚙️</span>

Displaying 1 - 10 of 15 << FIRST < PREV PAGE 1 OF 2 NEXT > LAST >>

## Download Event Results

Enrollment Events are available for download after the Batch has completed processing, not before. Users can click on the Download Event button to download all Processed records, or they can click on the Download Options icon to download Canceled records. Events are split into two buckets; Processed and Canceled.

1. An event is assigned a Processed status when an event is:
  - a. added
  - b. updated
  - c. added – master record updated
  - d. added – history record inserted
  
2. The main reasons an event is assigned a Canceled status are when there is:
  - a. an incorrect enrollment sequence
  - b. a duplicate event
  - c. an invalid Unique ID
  - d. an invalid school year
  - e. an invalid lookup code

UNIQUE ID HOME john.reese1, TEXAS EDUCATION AGENCY

Enrollment Events - Download with Options - Batch 893 ?

DOWNLOAD OPTIONS

---

AVAILABLE BATCH RECORDS TO DOWNLOAD

STATUS	UPLOAD DATE	BATCH #	LEA	CAMPUS	STATUS RECORD COUNT	TOTAL BATCH RECORD COUNT
<input checked="" type="radio"/> Processed	03/20/2018 09:57	893	000000	AAA	1	1

AVAILABLE OPTIONS TO DOWNLOAD

Batch Number:

Template:

Delimiter:

Qualifier:

(\*) Required

## Viewing Person Enrollment Events

The purpose of this feature is to allow authorized users to view Enrollment data.

### Steps

To view Enrollment from the **Person Search** component, a user should perform the following steps:

1. Click the **Person Search** link on the *Menu*.
2. Search for a person as described above.
3. Click the hyperlinked **Last Name** or **First Name** to view the search details.
4. Click on the Enrollment tab link.
5. The Enrollment tab will display all enrollment events that are in the UID system for a student record.

UNIQUE ID HOME john.reese1, TEXAS EDUCATION AGENCY

Person Search - Individual Person Information ?

**Sissy Spacek** 4692817348  
GENDER: FEMALE DATE OF BIRTH: 03/09/2002 LOCAL ID: 043004 SSN: 881-01-0400 PERSON TYPE: Student  
LAST UPDATED: 03/26/2018 11:11 ID CREATED: 02/20/2018 10:37

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

FILTER

LEA: All LEAs PERSON TYPE: All SCHOOL YEAR: 2018 SORT: Entry/Exit Date Desc FILTER RESULTS

LAST UPDATED	LEA	CAMPUS	PERSON TYPE	GRADE LEVEL	SCHOOL YEAR	ENROLL/WITHDRAW DATE	ENROLL/WITHDRAW TYPE	LOCAL ID	SOURCE	ENROLL/WITHDRAW FLAG	EMAIL
03/26/2018	043905	043905005	Student	11	2018	03/25/2018	Entry	043004	SIS		✕
03/23/2018	043905	043905005	Student	12	2018	03/23/2018	Entry	043004	SIS		✕
03/20/2018	043905	043905005	Student	11	2018	03/20/2018	Entry	043004	SIS		✕
03/20/2018	043905	043905005	Student	11	2018	03/19/2018	Exit	043004	SIS		✕
02/20/2018	043905	043905005	Student	11	2018	08/22/2017	Entry	043004	SIS		✕

Displaying 1 - 5 of 5 << FIRST < PREV PAGE 1 OF 1 NEXT > LAST >>

*In order to edit a person enrollment event, you must select a location from the enrollment event information above if you are authorized to do so. Only enrollment events for the current school year can be edited.*

BACK TO SEARCH RESULTS EDIT ENROLLMENT ADD ENROLLMENT

**NOTE:** The Enrollment tab, the Add Enrollment button, and the Edit Enrollment button can be enabled or disabled per user role by the System Administrator.

## Adding Person Enrollment Events

The purpose of this feature is to allow authorized users to add Enrollment Events through the user interface.

### Steps

To add an Enrollment Event from the **Person Search** component, a user should perform the following steps:

1. Follow steps 1-4 above.
2. Click the Add Enrollment button. The Add Enrollment page will display.
3. Complete the required information and click on the Add Enrollment button.

UNIQUE ID HOME john.reese1, TEXAS EDUCATION AGENCY

Add Enrollment Information ?

ENROLLMENT INFORMATION

UNIQUE ID	4692817348
FIRST NAME	Sissy
MIDDLE NAME	
LAST NAME	Spacek
GENDER	FEMALE
DATE OF BIRTH	03/09/2002
PERSON TYPE *	Student <input type="checkbox"/>
GRADE LEVEL: *	11 <input type="checkbox"/>
CAMPUS: *	000000001
LEA *	000000
SCHOOL YEAR *	2018
ENROLL/WITHDRAW DATE *	04/10/2018 <input type="checkbox"/>
ENROLL/WITHDRAW TYPE *	Entry <input type="checkbox"/>
ENROLL/WITHDRAW FLAG	Verified <input type="checkbox"/>
LOCAL ID *	123456
SOURCE SYSTEM *	Default <input type="checkbox"/>

(\*) Required

[BACK TO PERSON INFORMATION](#) [ADD ENROLLMENT](#)

4. If validation errors exist, the page will display all errors at the top and highlight the same within the page.

UNIQUE ID HOME john.reese1, TEXAS EDUCATION AGENCY

Add Enrollment Information ?

The student information has not been updated. Validation errors.

Validation Errors : CAMPUS required

ENROLLMENT INFORMATION

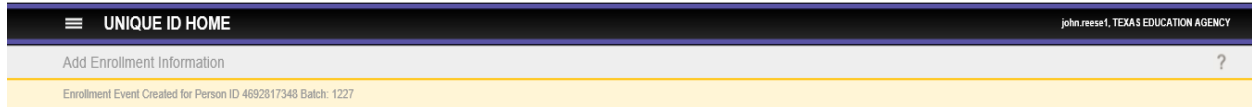
UNIQUE ID	4692817348
FIRST NAME	Sissy
MIDDLE NAME	
LAST NAME	Spacek
GENDER	FEMALE
DATE OF BIRTH	03/09/2002
PERSON TYPE *	Student <input type="checkbox"/>
GRADE LEVEL: *	11 <input type="checkbox"/>
CAMPUS: *	
LEA *	000000
SCHOOL YEAR *	2018
ENROLL/WITHDRAW DATE *	04/10/2018 <input type="checkbox"/>
ENROLL/WITHDRAW TYPE *	Entry <input type="checkbox"/>
ENROLL/WITHDRAW FLAG	Verified <input type="checkbox"/>
LOCAL ID *	123456
SOURCE SYSTEM *	Default <input type="checkbox"/>

(\*) Required

[BACK TO PERSON INFORMATION](#) [ADD ENROLLMENT](#)

4.

5. If there are no validation errors, the Add Enrollment Information page will refresh and display the following message:



## Editing Person Enrollment Events

The purpose of this feature is to allow authorized users to edit Enrollment Events through the user interface.

**NOTE:** Users can only edit Enrollment Events associated to their Location. Additionally, only current school year Enrollment Events can be edited when the School Year validation is enabled.

### Steps

To edit an Enrollment Event from the **Person Search** component, a user should perform the following steps:

1. Follow steps 1-4 above.
2. Click the Edit Enrollment button. The Edit Enrollment page will display.
3. Update the information and click on the Edit Enrollment button.

UNIQUE ID HOME John Reese, FRISCO ISD

Edit Enrollment Information ?

ENROLLMENT INFORMATION

UNIQUE ID	7271653392
FIRST NAME	Student
MIDDLE NAME	
LAST NAME	Text
GENDER	MALE
DATE OF BIRTH	10/05/2002
PERSON TYPE *	Student
GRADE LEVEL *	10
CAMPUS *	043905001 FRISCO H S
LEA *	043905 FRISCO ISD
SCHOOL YEAR *	2018
ENROLL WITHDRAW DATE *	10/05/2002
ENROLL WITHDRAW TYPE *	Entry
ENROLL WITHDRAW PLAN	Calendar
LOCAL ID *	12345
SOURCE SYSTEM *	SIS
CREATED BY	John Reese
CREATED	02/23/2018
LAST UPDATED BY	John Reese
LAST UPDATED	06/11/2018

(\*) Required

[BACK TO PERSON INFORMATION](#) [EDIT ENROLLMENT](#)

4. If validation errors exist, the page will display all errors at the top and highlight the same within the page.



UNIQUE ID HOME john.reese, FRISCO ISD

Edit Enrollment Information ?

The person information has not been updated. Validation errors.

Validation Errors : The enrollment event has not been updated. Information has not changed.

ENROLLMENT INFORMATION

UNIQUE ID	7271853392
FIRST NAME	Student
MIDDLE NAME	
LAST NAME	Test
GENDER	MALE
DATE OF BIRTH	10/05/2002
PERSON TYPE *	Student
GRADE LEVEL *	10
CAMPUS *	043905001
LEA *	043905
SCHOOL YEAR *	2010
ENROLL/WITHDRAW DATE *	10/05/2002
ENTRY / WITHDRAW TYPE *	Entry
ENROLL/WITHDRAW FLAG	Calendar
LOCAL ID *	12345
SOURCE SYSTEM *	SIS
CREATED BY	John Reese
CREATED	02/23/2018
LAST UPDATED BY	John Reese
LAST UPDATED	04/11/2018

(\*) Required

[BACK TO PERSON INFORMATION](#) [EDIT ENROLLMENT](#)

If there are no validation errors, the Edit Enrollment Information page will refresh and display the following message:

STATE ID 0000supr, Jefferson School District

Edit Enrollment Information ?

Enrollment Event Found and Updated for Person ID 7736612757 Batch: 3682

- Users can delete an enrollment event by repeating 1-3 above and selecting the “Delete” option from the dropdown menu for the Entry/Exit Verified Flag field. Deleted events will remain in the student record but will appear with a strikethrough.

The screenshot shows the 'UNIQUE ID HOME' interface. At the top, it says 'Person Search - Individual Person Information'. Below that, the student's details are shown: 'Student Test', GENDER: MALE, DATE OF BIRTH: 10/05/2002, LOCAL ID: 043001, SSN: 881.01.0100, PERSON TYPE: Student, LAST UPDATED: 04/03/2018 13:37, ID CREATED: 01/18/2018 14:20, and ID number 7271653392. There are tabs for MASTER RECORD, HISTORY, ASSOCIATED RETIRED IDs, and ENROLLMENT. Below the tabs is a filter section with dropdowns for LEA (All LEAs), PERSON TYPE (All), SCHOOL YEAR (2018), and SORT (Entry/Exit Date Desc). A 'FILTER RESULTS' button is present. The main part of the page is a table of enrollment events. A red oval highlights the first two rows of the table. The table has columns: LAST UPDATED, LEA, CAMPUS, PERSON TYPE, SCHOOL YEAR, ENROLLMENT DATE, ENROLLMENT SOURCE, LOCAL ID, SOURCE, ENROLL/WITHDRAW FLAG, and EMAIL. The first row shows an enrollment on 04/11/2018 for LEA 643906, CAMPUS 043605001, Student, KG, 2018, with an enrollment date of 02/23/2018, source SIS, and a 'Delete' flag. The second row shows an enrollment on 10/04/2017 for LEA 165901, CAMPUS 165901125, Student, KG, 2018, with an enrollment date of 08/28/2017, source SIS, and a 'Delete' flag. Below the table, there is a note: 'In order to edit a person enrollment event, you must select a location from the enrollment event information above if you are authorized to do so. Only enrollment events for the current school year can be edited.' At the bottom, there are buttons for 'BACK TO SEARCH RESULTS', 'EDIT ENROLLMENT', and 'ADD ENROLLMENT'.

LAST UPDATED	LEA	CAMPUS	PERSON TYPE	SCHOOL YEAR	ENROLLMENT DATE	ENROLLMENT SOURCE	LOCAL ID	SOURCE	ENROLL/WITHDRAW FLAG	EMAIL	
04/11/2018	643906	043605001	Student	KG	2018	02/23/2018	Entry	42346	SIS	Delete	
10/04/2017	165901	165901125	Student	KG	2018	08/28/2017	Entry	878824	SIS		

## Enrollment Event Emails

The purpose of this feature is to allow authorized users to send emails to other LEAs using the eUID email template.

**NOTE:** eUID pulls the email and contact information from the system. The email template will be incomplete or not visible if the email to address, first name, last name, and such are missing

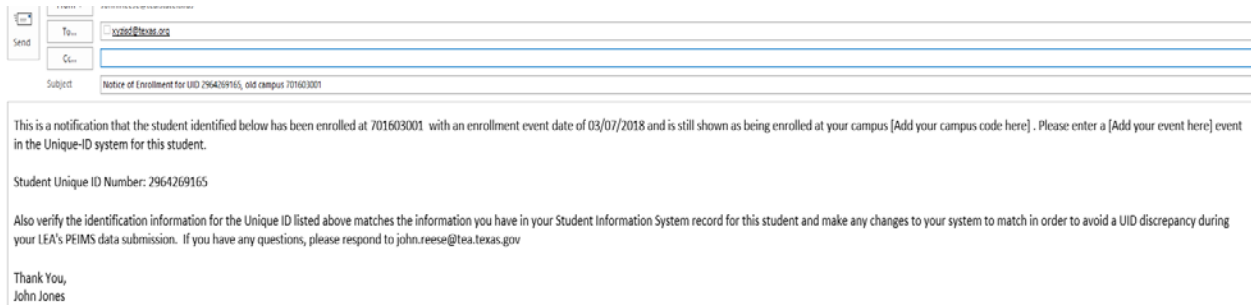
### Steps (send email)

Users will be able to send emails for a Unique ID by following these steps:

1. Access the **Person Search** Menu Option.
2. Search for the person using either Basic, Advanced, or ID search.
3. Click on the **First Name** or **Last Name** of the Person
4. Click on the **Enrollment Tab** once the Person Information page loads
5. Click on the **email** icon

The application will open an email template on the user's default email client. Default email client is configured locally on the user's machine.

When the user clicks on the enrollment event email icon, the following template will open on the user's default email client. Please note that the email To address could be empty if the email address is not populated for that LEA/Campus in the system.



## Exit Application

The **Exit Application** link on the **Menu** allows you to log off of the TSDS Unique ID system. Once **Exit Application** link is clicked, navigation is to the TSDS portal home page.

## Change Districts

If you have access to more than one LEA, you can search for persons in any district. However, for uploads, the application requires you to work with only one LEA at a time. If you have access to more than one district, you must exit out of Unique ID application and change districts in TSDS.

## Appendix A – Batch Info Window

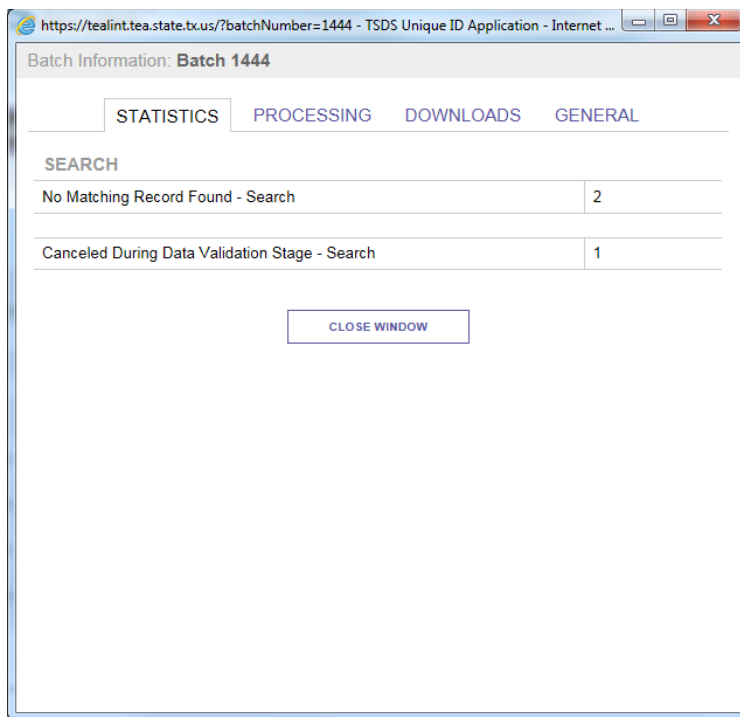
Throughout the TSDS Unique ID System, you can view detailed information about a particular submission by clicking on the batch number displayed in the **Batch Info** column:

UPLOAD DATE	BATCH INFO	DISTRICT	SCHOOL	STATUS	RECORD COUNT	NEXT ACTION
06/09/2016 14:45	1425	227901	AAA	ID(s) Assigned.	2	<a href="#">EXTRACT RECORDS</a> <a href="#">ADD TO DOWNLOAD CART</a>

Doing so displays the Batch **Info** window. There are four sections/tabs in the window: (1) Batch Statistics (2) Processing Info (3) Download Info (4) General Info.

### Batch Statistics Tab

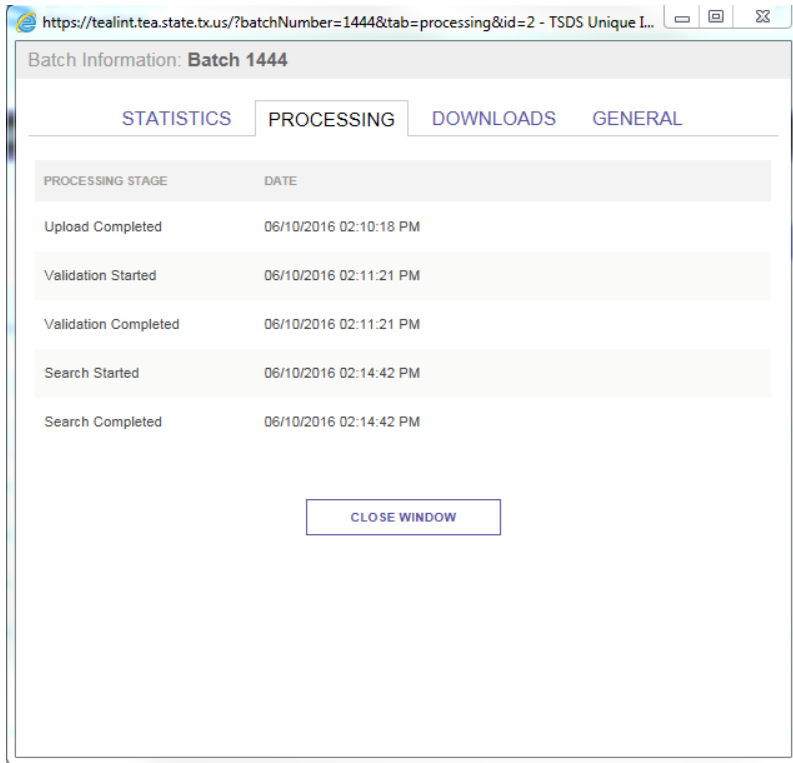
The **Batch Statistics** tab appears where each record in a submission is within the ID Assignment Process or a Batch Search:



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

### Processing Info Tab

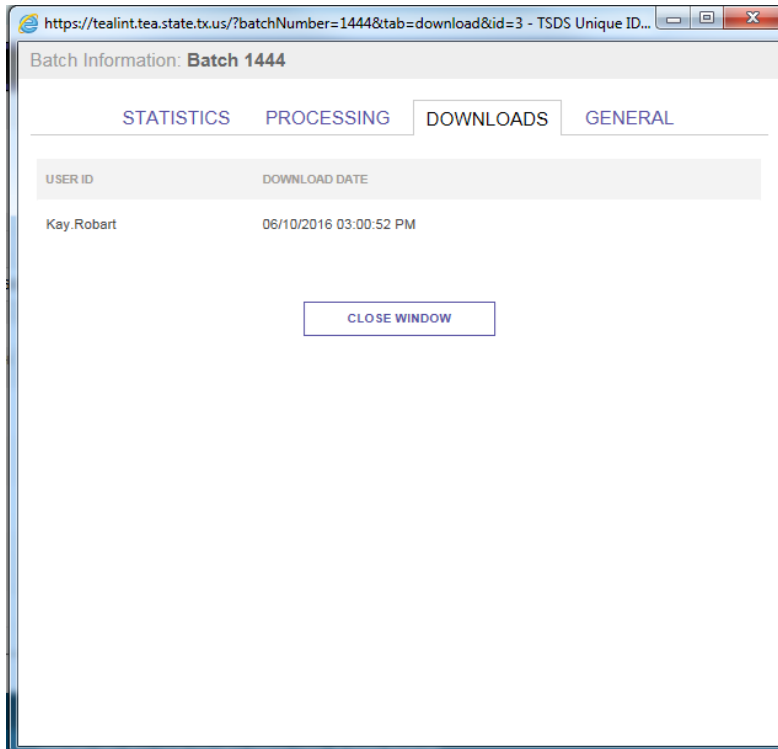
The **Processing Info** tab displays a timeline of each step in the ID Assignment Process or a Batch Search:



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

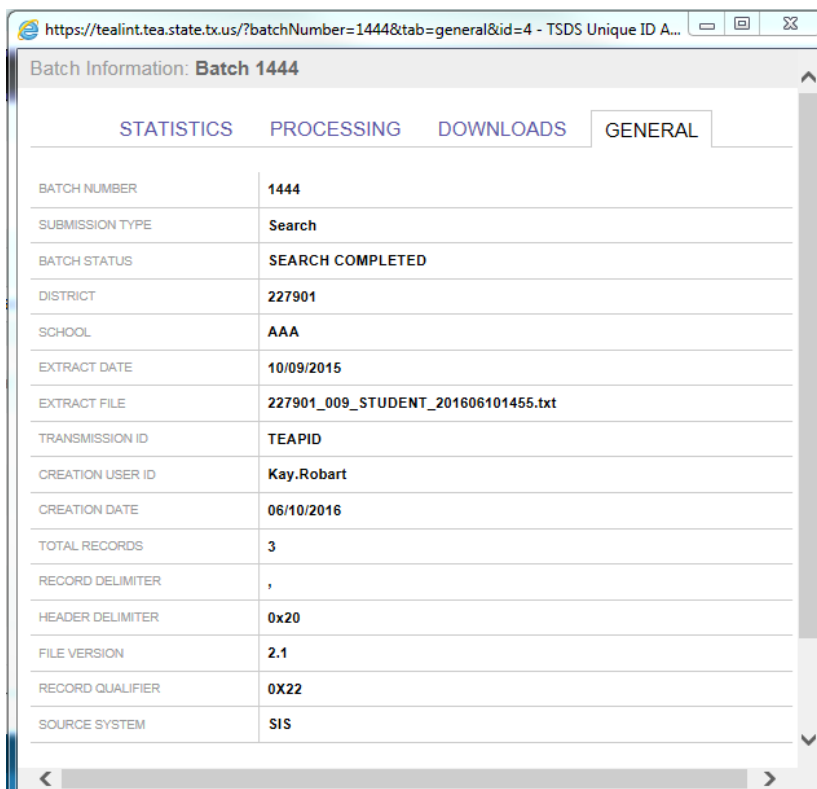
## Downloads Tab

The Download Info tab displays 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 appears in the list:



## General Tab

The General tab displays basic information about a submission:



## Appendix B – Batch Record Statuses

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

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

## Appendix C – Canceled Records Error Messages

### Canceled Record Comments

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

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



SSN is not present.
SSN is not valid.(XXXinvalid valueXXX)
User is not authorized to submit person for the specified district.(XXXinvalid valueXXX)
Record Type is not present.
Record Type is not valid.(XXXinvalid valueXXX)
Data not valid in a customer defined field.
Alternate Last Name is not valid.(XXXinvalid valueXXX)
Alternate Last Name is not present.
Data not present in a required customer defined field.
Alternate source is not present.
Alternate ID is not present.

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

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

## Appendix D: Batch Search File Format

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

Field Name	Required	System - Data type	File Format Version	Notes/Format Details
Record Type	Yes	VarChar (2)		Always 'ID'.
Current School Code	No	VarChar (20)		School Code where the person is currently enrolled. If a value is submitted, it is validated.
Resident District Code	No	VarChar (20)		District where the person is currently a resident. A System Property can make this field optional. If a value is submitted, it is validated.
Last Name	Yes	VarChar (60)		Legal last name of the person. <i>Matching Field</i> .
First Name	Yes	VarChar (60)		Legal first name of the person. <i>Matching Field</i>
Middle Name	No	VarChar (60)		Legal middle name of the person. <i>Matching Field</i>
Name Suffix	No	VarChar (10)		
Gender	No	VarChar (6)		If a value is submitted, it is validated. State-defined Gender Codes. This should be submitted when available since it will impact the match results. <i>Matching Field</i>
Date of Birth	No	VarChar (10)		If a value is submitted, it is validated. This should be submitted when available since it will impact the match results. Can be in one of the following formats: <ul style="list-style-type: none"> <li>• mm/dd/yyyy</li> <li>• m/d/yyyy</li> <li>• mm/d/yyyy</li> <li>• m/dd/yyyy</li> </ul>

				<ul style="list-style-type: none"> <li>• yyyy-dd-mm</li> </ul> <p><i>Matching Field</i></p>
Current Grade Level	No	VarChar (2)		If a value is submitted, it is validated. State-defined Grade Level Code. Note – Grade will be validated against Ethnicity Indicators. If a certain Ethnicity Indicator is only valid for a specific grade range, the application will return an error.
Local Student ID	No	VarChar (20)		ID used in the local Student Information System to uniquely identify the student in the submitting system. The primary purpose of this field is to provide a mechanism to import student data from the eScholar Unique ID® for Students system back into the local source systems. In addition, this field is used in a limited capacity to match student records within the eScholar Unique ID® for Students system. This field can be set to optional for Online Entry only.
Social Security Number	No	VarChar (11)		It is not required for matching, but will be used if it is supplied. <i>Matching Field</i>
Race / Ethnicity	No	VarChar (4)		If a value is submitted, it is validated. State-defined Race / Ethnic code. Can be optional if Make Ethnic Code Option System Property is enabled.
Home	No	VarChar (25)		Batch Search will fail if the Home is submitted.
Current District Code	No	VarChar (20)		If a value is submitted, it is validated. District Code where the student is currently enrolled. State-defined valid
Current School Year	No	VarChar (10)		Must have a 'yyyy' format.
Alternate Last Name	No	VarChar (60)	V2 only	This field should be used for the birth surname, alternate last name, or former last name of the student. Blank submissions are ignored if an Alternate Last Name was previously submitted. To clear an Alternate Last Name, the word NULL in all capital letters must be supplied during submission for this field. <i>Matching Field</i>
Alternate ID	No	VarChar (50)	V2 only	This is an ID used in the system defined in the Alternate Source field. If Alternate Source is

				provided, this field is required.
Alternate Source	No	VarChar (60)	V2 only	This is the source name for the Alternate ID field. This can be used to track additional local identifiers or other Homeentifiers. If Alternate ID is required, this field is required.
Customer Defined Field 1	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 2	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 3	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 4	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 5	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 6	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 7	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined

8				Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Record Status	No		V2 only	This field is the internal transaction status result for the record and is provided in the output file. This field should be blank on input. Any values on input will be ignored.
Record Reference Number	No		V2 only	This field is the internal transaction identifier for the record as part of the output file. This field should be blank on input. Any values on input will be ignored.
Ethnicity Indicator	No	VarChar (4)	No	If a value is submitted, it is validated. State-defined Race codes.
Race 2 Code	No	VarChar (10)	No	If a value is submitted, it is validated. State-defined Race codes.
Race 3 Code	No	VarChar (10)	No	If a value is submitted, it is validated. State-defined Race codes.
Race 4 Code	No	VarChar (10)	No	If a value is submitted, it is validated. State-defined Race codes.
Race 5 Code	No	VarChar (10)	No	If a value is submitted, it is validated. State-defined Race codes.
Record Update Date	No	VarChar (10)	No	This field is the last update for the record and is provided in the output file. This field should be blank on input. Any values on input will be ignored.

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## Appendix E: Section 508 of the Rehabilitation Act Compliance

The TSDS Unique ID System is fully compliant with Section 508 of the Rehabilitation Act, all functionality works as intended if client-side scripting languages (that is, JavaScript) are disabled. If you fail to enter a required field on a page with scripting enabled, the application displays a pop-up message. If you fail to enter a required field on a page with scripting disabled, the application navigates to a new page instead of displaying a pop-up message. The error described on the page is similar to the pop-up message.