



**Texas Education Agency**

TSDS UNIQUE ID

## **TSDS Unique ID User Guide, ver. 1.0**

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# 1 About This Manual

This manual is designed as a reference guide for the TSDS Unique ID system. It includes descriptions of components, stepped directions, and screenshots to assist with using the application. The manual includes detailed information on error messages, file formats, and other application-specific details. Each major topic begins on a new page to make it easier to find information in this manual. All screenshots provided throughout this manual were produced using demonstration data and all SSNs on screenshots are invalid.

## 1.1 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.

State ID: (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 state ID.

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.

## 2 About the Application

### 2.1 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 the user to:

- Assign a unique statewide identifier for every staff member and student in pre-kindergarten, kindergarten, elementary, and secondary public education.
- Generate random State IDs 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 State ID, 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.

### 2.2 System Requirements

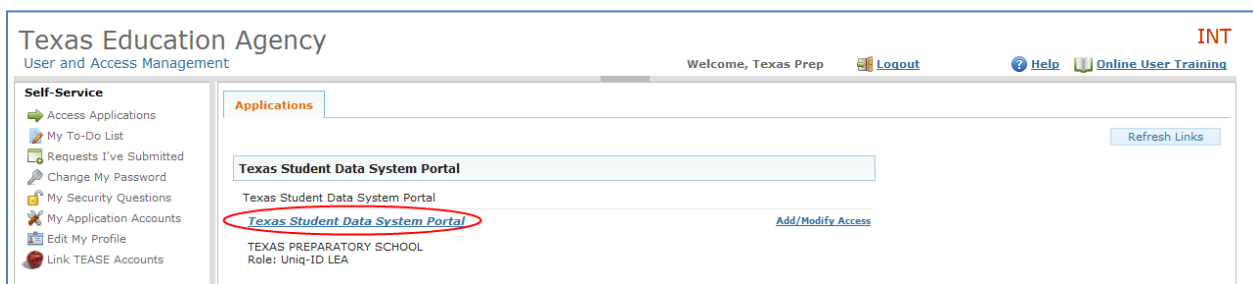
The application utilizes Adobe Acrobat and Microsoft Excel for reports provided in the application. If needed, the user should download Adobe Acrobat from <http://get.adobe.com/reader/>. Microsoft Excel or an Excel reader can be used.

## 2.3 Logging In

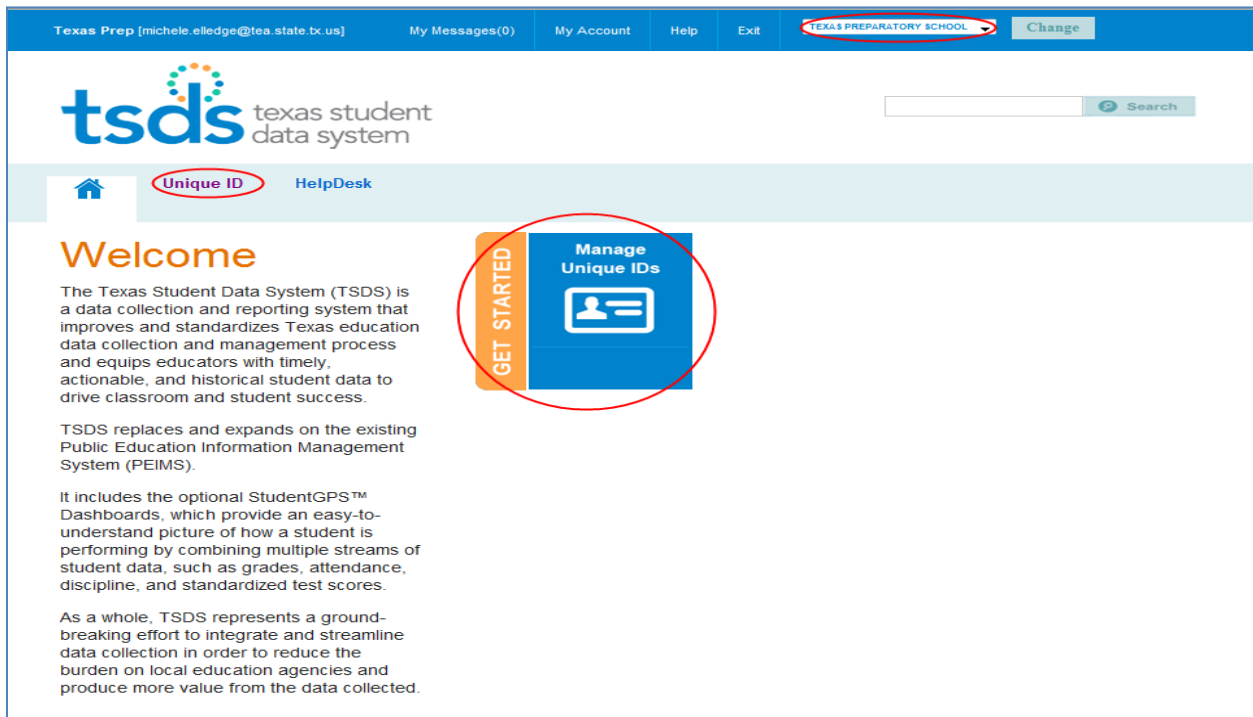
In order to access the TSDS Unique ID system, if you have not already done so, you must first set up a TEAL account and submit an account request to get access the TSDS Portal. When requesting access to the TSDS Portal, you must specify which Unique ID role is needed. This role controls the level of 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.



When clicked, the TSDS Portal page is displayed:



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.

## 2.4 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 the role of the user. 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 the user 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 the user to perform the actions associated with the Unique ID Search role.**

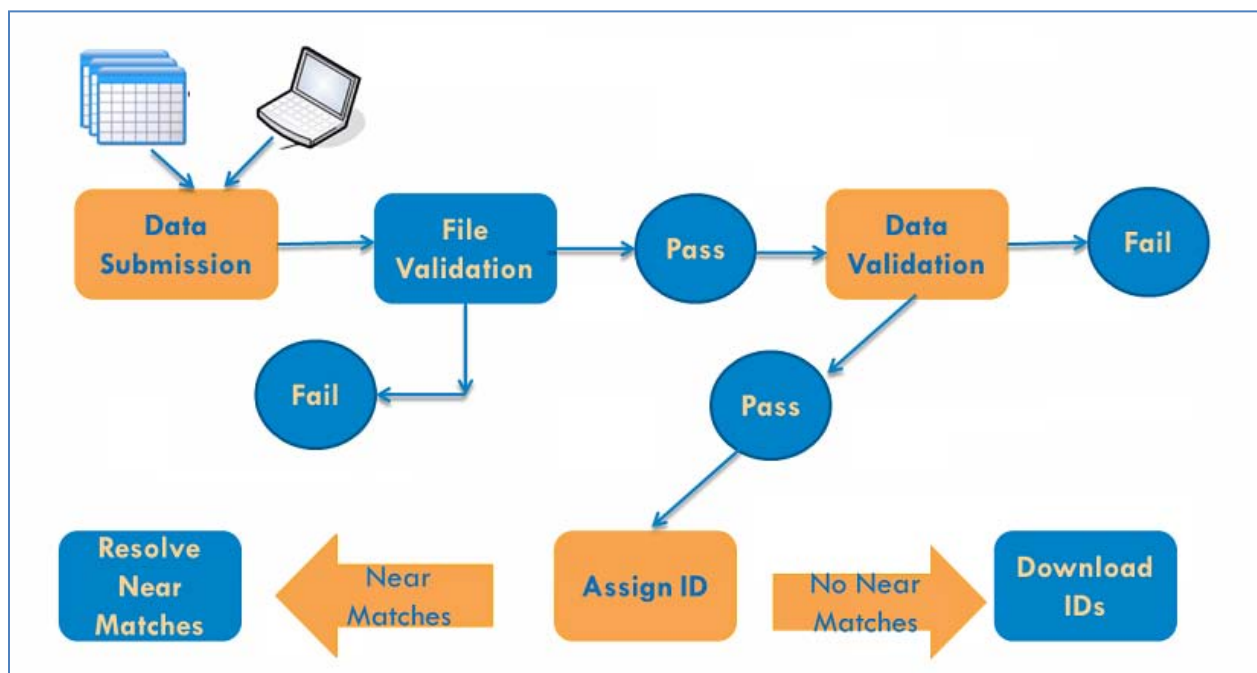
**Unique ID LEA** - role allows the user to search the Unique ID database, download Unique IDs, and update demographic information for the local education agency (LEA—Texas school district or charter school) students and staff via the Unique ID application. When this role is selected, the user must enter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



## 2.5 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



## 3 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.

### 3.1 Home Page

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

### 3.2 Upload Batch File

This feature allows the user 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.

### 3.3 Enter Individual Person

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

### 3.4 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.

### 3.5 Batch Search

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

### 3.6 Extract & Download Batch

This feature provides the user 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

### 3.7 Download by Location

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

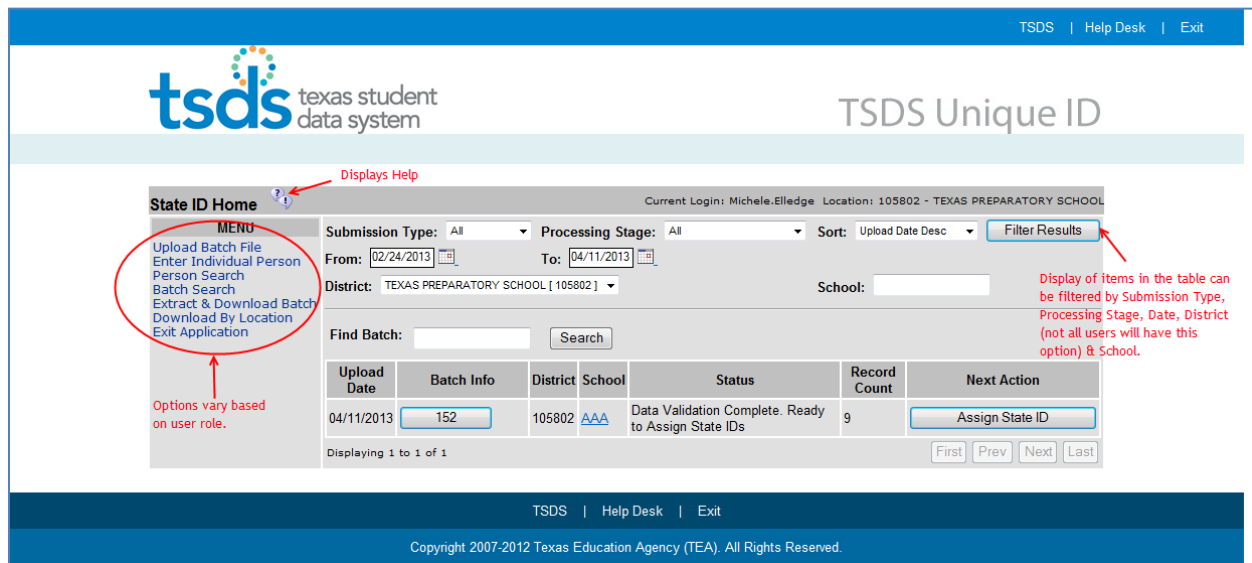
### 3.8 Exit Application

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

## 4 Home Page

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

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



State ID Home

Current Login: Michele.Elledge Location: 105802 - TEXAS PREPARATORY SCHOOL

**MENU**

- Upload Batch File
- Enter Individual Person
- Person Search
- Batch Search
- Extract & Download Batch
- Download By Location
- Exit Application

Options vary based on user role.

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

From: 02/24/2013 To: 04/11/2013

District: TEXAS PREPARATORY SCHOOL [ 105802 ] School:

Find Batch: Search

Upload Date	Batch Info	District	School	Status	Record Count	Next Action
04/11/2013	152	105802	AAA	Data Validation Complete. Ready to Assign State IDs	9	Assign State ID

Displaying 1 to 1 of 1

First Prev Next Last

TSDS | Help Desk | Exit

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### 4.1 Accessing Feature Menu Items

The **Menu** displayed on the top left side of the page contains links that provide 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.

### 4.2 Viewing Previously Submitted Batches

The right-hand section of the **State ID 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, batch ID, current status, number of records in the batch, and the next action. This list only displays batches the user has access to for their current location. The button in the **Next Action** column allows the user to continue where they left off in the ID assignment process.

The screenshot shows the 'State ID Home' page of the TSDS Unique ID system. The page includes a header with the TSDS logo and 'TSDS Unique ID' text. A navigation bar at the top right contains links for 'TSDS', 'Help Desk', and 'Exit'. The main content area features a 'MENU' on the left with options like 'Upload Batch File', 'Enter Individual Person', 'Person Search', 'Batch Search', 'Extract & Download Batch', 'Download By Location', and 'Exit Application'. The central section contains filters for 'Submission Type' (All), 'Processing Stage' (All), 'Sort' (Upload Date Desc), and a 'Filter Results' button. Below these are date range filters ('From: 02/24/2013', 'To: 04/11/2013'), a 'District' dropdown (TEXAS PREPARATORY SCHOOL [105802]), and a 'School' input field. A 'Find Batch' search bar is also present. The main data area displays a table with the following columns: Upload Date, Batch Info, District, School, Status, Record Count, and Next Action. The table lists four batches with their respective dates, IDs (155, 154, 153, 152), district (105802), school (AAA), and status (Near Matches / Duplicates Found, ID Assigned, ID Assigned, Data Validation Complete). Each row has a 'Next Action' button (Resolve Near Matches, Download State ID, Download State ID, Assign State ID). At the bottom of the table, it says 'Displaying 1 to 4 of 4' and includes navigation buttons: First, Prev, Next, Last.

Upload Date	Batch Info	District	School	Status	Record Count	Next Action
04/11/2013	155	105802	AAA	Near Matches / Duplicates Found	1	Resolve Near Matches
04/11/2013	154	105802	AAA	ID Assigned	1	Download State ID
04/11/2013	153	105802	AAA	ID Assigned	1	Download State ID
04/11/2013	152	105802	AAA	Data Validation Complete. Ready to Assign State IDs	9	Assign State ID

**Note:** The **Status** column always displays the current status of the batch and guides the user to the next action. The **Next Action** column has a button that enables the user 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.

### 4.3 Filtering Batches

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

This is a partial screenshot of the 'State ID Home' page, focusing on the filter section. It shows the 'MENU' on the left, the 'Submission Type' (All), 'Processing Stage' (All), and 'Sort' (Upload Date Desc) dropdowns, and the 'Filter Results' button. Below these are the date range filters ('From: 03/02/2013', 'To: 04/17/2013'), the 'District' dropdown (TEXAS PREPARATORY SCHOOL [105802]), and the 'School' input field. The 'Find Batch' search bar is also visible.

The **State ID Home** page includes the following filters:

- **Submission Type:** 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 options are **All**, **Validate Data**, **Fix Errors**, **Assign State ID**, **Resolve Near Matches**, **Download State ID**, **Canceled**, **Validation in Progress**, **Assignment in Progress**, **Continue Validation**, and **Continue Assignment**. (**Fix Errors** is not applicable to TSDS Unique ID.)
- **Submission Date:** Date ranges must be valid.
- **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.

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:

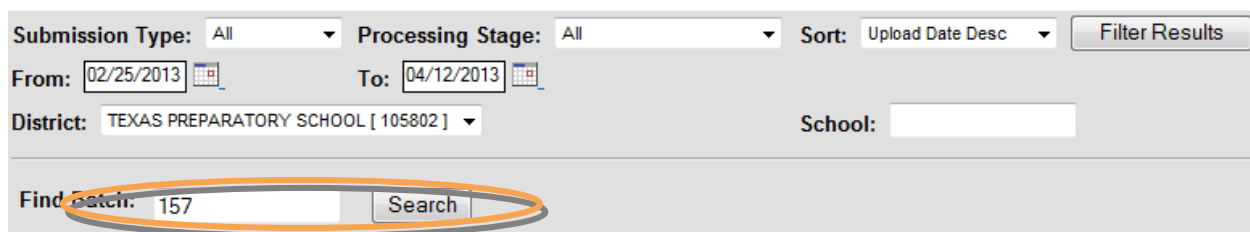
1. Access the **State ID Home** page by either logging in or clicking **State ID Home**.
2. Click the dropdown arrow or use the date picker and select the appropriate option for each of the filters.
3. Click **Filter Results**.

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

## 4.4 Finding a Batch

The **Find Batch** feature, located immediately above the list of submissions on the application's main page, allows you to view and work on a specific batch. The **State ID 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 **Find Batch** field and then click **Search**.

In the following example, the user wants to locate batch 157:



The screenshot shows the TSDS Unique ID application interface. At the top, there are several filter options: 'Submission Type' (All), 'Processing Stage' (All), 'Sort' (Upload Date Desc), and a 'Filter Results' button. Below these are date pickers for 'From' (02/25/2013) and 'To' (04/12/2013). There is also a 'District' dropdown menu (TEXAS PREPARATORY SCHOOL [ 105802 ]) and a 'School' text input field. At the bottom, there is a 'Find Batch' section with a text input field containing '157' and a 'Search' button. The 'Find Batch' text and the input field are circled in orange.

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

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

From: 02/25/2013 To: 04/12/2013

District: TEXAS PREPARATORY SCHOOL [ 105802 ] School:

Find Batch: Search

Upload Date	Batch Info	District	School	Status	Record Count	Next Action
04/12/2013	157	105802	AAA	IDs Assigned	1	Download State ID

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

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

From: 02/25/2013 To: 04/12/2013

District: TEXAS PREPARATORY SCHOOL [ 105802 ] School:

Find Batch: Search

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

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

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

TSDS | Help Desk | Exit

**tsds** texas student data system TSDS Unique ID

State ID Home

Current Login: Multi-District Location: 105802 - TEXAS PREPARATORY SCHOOL

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

From: 03/15/2013 To: 04/29/2013

District: TEXAS PREPARATORY SCHOOL [ 105802 ] School:

Find Batch: Search

Upload Date	Batch Info	District	School	Status	Record Count	Next Action
Click <a href="#">here</a> to change your current district to: ( 227901 - AAA ) and go to batch: 211						

TSDS | Help Desk | Exit

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In the above example, the batch the user searched for is in another district. They 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.

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



## 5 Assign IDs via Batch File

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

### 5.1 Uploading a Batch File

To upload a batch file, follow these steps:

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

3. Click **Browse** to view the local computer system directory structure. The file must be located on the local computer system in order to upload the file.

4. Browse through the directory structure and choose the directory/folder where the batch file is stored.
5. Select the appropriate file from the local system and click **Open**.
6. 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.

### 5.1.1 File Upload Failure

If the system encounters any issues during the file validation stage it provides details about the error(s) and the file is not be uploaded. The status column displays the reasons why the file failed to upload as illustrated below:

The screenshot displays the 'Upload Batch File' interface within the TSDS Unique ID system. At the top, the TSDS logo and 'texas student data system' are visible, along with the title 'TSDS Unique ID'. The interface includes a navigation bar with 'TSDS | Help Desk | Exit' and a 'State ID Home' button. Below the navigation bar, the current login is 'Michele.Elledge' and the location is '105802-TEXAS PREPARATORY SCHOOL'. The main content area features a table with columns: 'Upload Date', 'Batch Info', 'Status', 'Number of Records', and 'Next Action'. The 'Status' column contains a detailed error message: 'File Upload failed for the following reasons: The uploaded file has too many data errors to proceed. The maximum number of allowable data errors in any one file is 30'. Below this, a list of 'Data Errors' is provided: 'Date Of Birth is not valid on 9 line(s): 2,3,4,5,6,7,8,9,10', 'Gender is not valid on 6 line(s): 5,6,7,8,9,10', 'Race/Ethnic Code is not valid on 9 line(s): 2,3,4,5,6,7,8,9,10', 'Grade Level is not valid on 5 line(s): 3,7,8,9,10', 'SSN is not valid on 4 line(s): 4,5,7,10', and 'Invalid Ethnicity Indicator. on 5 line(s): 3,7,8,9,10'. The message concludes with: 'The file you attempted to upload has been saved to the database and can be downloaded using the Extract & Download Batch feature. The batch number assigned to this file is 168. Fix The Above Errors And Resubmit New File. Contact DE for Assistance.' The 'Next Action' column contains a button labeled 'Upload New File'.

TSDS | Help Desk | Exit

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

### 5.1.2 File Upload Success

If the system does not encounter any issues with the batch file during the file validation stage, the system allows the user to view details about the batch (see 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:

Validate Data				
Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL				<a href="#">State ID Home</a>
Upload Date	Batch Info	Status	Number of Records	Next Action
04/15/2013	163	Data Validation is in progress.	In Progress	Check for completion later.

## 5.2 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.

### 5.2.1 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 as illustrated below:

Upload Batch File				
Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL				<a href="#">State ID Home</a>
Upload Date	Batch Info	Status	Number of Records	Next Action
		<p>File Upload failed for the following reasons: The uploaded file has too many data errors to proceed. The maximum number of allowable data errors in any one file is 30</p> <p>Data Errors: Date Of Birth is not valid on 9 line(s): 2,3,4,5,6,7,8,9,10 Gender is not valid on 6 line(s): 5,6,7,8,9,10 Race/Ethnic Code is not valid on 9 line(s): 2,3,4,5,6,7,8,9,10 Grade Level is not valid on 5 line(s): 3,7,8,9,10 SSN is not valid on 4 line(s): 4,5,7,10 Invalid Ethnicity Indicator. on 5 line(s): 3,7,8,9,10</p> <p>The file you attempted to upload has been saved to the database and can be downloaded using the Extract &amp; Download Batch feature. The batch number assigned to this file is 166 Fix The Above Errors And Resubmit New File Contact DE for Assistance.</p>		<a href="#">Upload New File</a>

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

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

## 5.3 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 State ID**.

State ID Home

Current Login: Michele.Elledge Location: 105802 - TEXAS PREPARATORY SCHOOL

**MENU**

- Upload Batch File
- Enter Individual Person
- Person Search
- Batch Search
- Extract & Download Batch
- Download By Location
- Exit Application

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

From: 03/02/2013 To: 04/17/2013

District: TEXAS PREPARATORY SCHOOL [ 105802 ] School:


Find Batch: Search

Upload Date	Batch Info	District	School	Status	Record Count	Next Action
04/15/2013	165	105802	AAA	Data Validation Complete. Ready to Assign State IDs	8	Assign State ID

To assign Unique IDs, perform the following steps:

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

TSDS | Help Desk | Exit


TSDS Unique ID

---

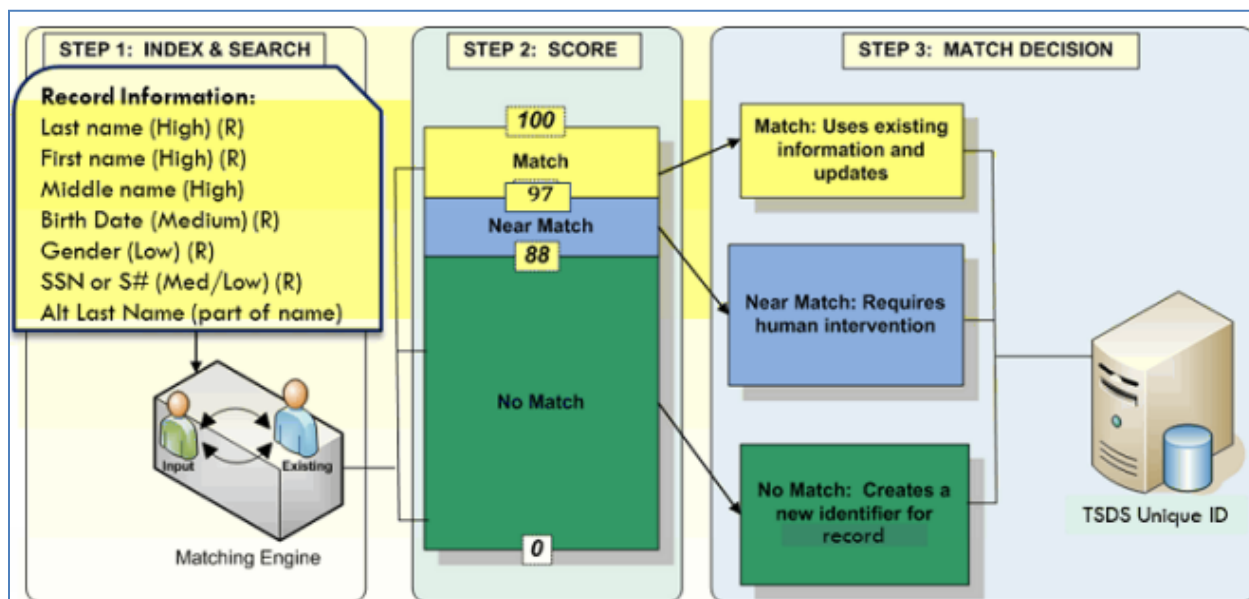
**Assign IDs**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL State ID Home

Upload Date	Batch Info	Status	Number of Records	Next Action
04/15/2013	165	ID Assignment is in progress.	In Progress	Check for completion later.

- To review the updated status of the assignment process, return to the system home page by clicking **State ID Home**.
- Review the “Status” column for the updated status or click **Batch Info** to review batch information. See Batch Information section below for more details about this.
- Review the **Next Action** column for the appropriate next step.

When the user clicks **Assign State 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.
5. Complete the next action step by clicking the button displayed in the **Next Action** column.
- a. 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**:

The screenshot shows the TSDS Unique ID application interface. At the top, there is a blue header with the TSDS logo and the text 'TSDS Unique ID'. Below the header, there is a navigation bar with 'TSDS | Help Desk | Exit'. The main content area has a 'State ID Home' section with a 'MENU' on the left containing links like 'Upload Batch File', 'Enter Individual Person', 'Batch Search', 'Extract & Download Batch', 'Download By Location', and 'Exit Application'. The main area contains search filters for 'Submission Type', 'Processing Stage', 'Sort', 'From', 'To', 'District', and 'School'. Below these filters is a 'Find Batch' search bar. A table displays the results of the search, with columns for 'Upload Date', 'Batch Info', 'District', 'School', 'Status', 'Record Count', and 'Next Action'. The table shows one batch with an upload date of 04/16/2013, batch info 167, district 105802, school AAA, status 'Near Matches / Duplicates Found', and record count 1. The 'Next Action' column for this batch contains a button labeled 'Resolve Near Matches'.

Upload Date	Batch Info	District	School	Status	Record Count	Next Action
04/16/2013	167	105802	AAA	Near Matches / Duplicates Found	1	Resolve Near Matches

- b. 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 State ID**:

State ID Home

Current Login: Michele.Elledge Location: 105802 - TEXAS PREPARATORY SCHOOL

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

From: 03/02/2013 To: 04/17/2013

District: TEXAS PREPARATORY SCHOOL [ 105802 ] School:

Find Batch: Search

Upload Date	Batch Info	District	School	Status	Record Count	Next Action
04/15/2013	165	105802	AAA	IDs Assigned	8	Download State ID

TSDS | Help Desk | Exit

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**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.

## 5.4 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, the user 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.

### 5.4.1 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 **Assign Selected** is selected in error, please alert your System Administrator so he/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 the user 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 the user 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 the user is 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 the user reviews 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.

#### 5.4.2 Processing Near Matches

To resolve near matches, perform the following steps:

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

Upload Date	Batch Info	District	School	Status	Record Count	Next Action
04/11/2013	155	105802	<a href="#">AAA</a>	Near Matches / Duplicates Found	1	<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 four records that resulted in a near match:

**Resolve Near Matches / Duplicates**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL [State ID Home](#)

☐ Select All On Page [Cancel All Checked Records](#) [Cancel All Near Match Records For This Batch](#)

Last Name:  [Filter Results](#)

Last Name	First Name	Middle Name	Alt Last Name	Suffix	Date Of Birth	Gender	District	School	Res District	Local ID	
<a href="#">Campus</a>	Mary	Sue			05/23/1996	FEMALE	105802	105802041		787455815298	<a href="#">Review and Select</a>
<a href="#">Schoolhouse</a>	Timothy	Ronald			08/04/1996	MALE	105802	105802041		123456789	<a href="#">Review and Select</a>
<a href="#">Student</a>	John				10/25/2004	MALE	105802	105802041		615758988995	<a href="#">Review and Select</a>
<a href="#">Student</a>	Jane				12/29/1998	FEMALE	105802	105802041		167847772313	<a href="#">Review and Select</a>

Displaying 1 to 4 of 4 [First](#) [Prev](#) [Next](#) [Last](#)

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- Click **Review and Select** or the hyperlinked name to view the **Resolve Near Matches / Duplicates** details page.
- 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**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL [State ID Home](#)

**Person Record to Review and Select**

Last Name	First Name	Middle Name	Alt Last Name	Suffix	Date Of Birth	Gender	District	School	Local ID
Campus	Mary	Sue			05/23/1996	FEMALE	105802	105802041	787455815298

[Assign Selected](#) [Create New ID](#) [Cancel Record](#) [Select Another Record](#)

**Near Matches / Duplicates Found**

Last Name	First Name	Middle Name	Alt Last Name	Suffix	Date Of Birth	Gender	District	School	Local ID	Match Probability
<a href="#">Campus</a>	Mary				05/23/1996	FEMALE	105802	105802041	787455815298	96 (NEAR MATCH)

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The purpose of the above page is simply to provide information to help the user 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.)

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tsds texas student data system

## TSDS Unique ID

**Compare Person Information**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL
[State ID Home](#)

	Person Record being reviewed.	Master Person Record [ State ID: 1318633729 - 96.0 ] <a href="#">Add Note</a>
First Name:	Mary	Mary
Last Name:	Campus	Campus
Middle Name:		Sue
Suffix:		
Alt Last Name:		
Date of Birth:	05/23/1996	05/23/1996
Gender:	FEMALE	FEMALE
SSN:	912001234	912001234
Ethnicity Indicator:	Non-Hispanic/Latino	Non-Hispanic/Latino
Ethnicity/Race:	Black or African American	Black or African American
Race 2 Code:		
Race 3 Code:		
Race 4 Code:		
Race 5 Code:		
District:	105802-TEXAS PREPARATORY SCHOOL	105802-TEXAS PREPARATORY SCHOOL
School:	105802041-TEXAS PREPARATORY SCHOOL	105802041-TEXAS PREPARATORY SCHOOL
Res District:		
Grade:	8	8
School Year:	2013	2013
Source System:	Default	Default
Local ID:	787455815298	787455815298
State ID		1318633729
Alternate Id		
Alternate Source		
Serial #	1857414	1857393
Created:	04/18/2013	04/18/2013
Last Updated	04/18/2013	04/18/2013
Comments	1318633729; 3493395388;	
Match Notes		
Update Master	<input checked="" type="radio"/> Yes <input type="radio"/> No	

Assign Selected
Create New ID
Cancel Record
Return to List of Near Matches

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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 the user clicks a decision button, the near match is resolved. Once a decision is submitted, the user cannot change it.

### Assign Selected

If the person under review is the same as master record, click **Assign Selected**. When **Assign Selected** is clicked, this 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 the user has authorization to update the master data, the application displays **Update Master** radio buttons (**Yes** and **No**)

If **No** is selected, then the master record *is not* updated with the submission record information.

If **Yes** is selected, 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.

### 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.

**⚠ WARNING! WHEN REVIEWING NEAR MATCHES, LOOK AT THE MATCH PROBABILITY, 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 **Cancel Record** is clicked, 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

The user can also navigate back to the list of Near Matches by clicking **Return to List of Near Matches**.

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


## 5.5 Scenarios That Always Result in Near Match

The following scenarios always produce a result of near match:

### 5.5.1 Multiple Matches:

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

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TSDS Unique ID

Compare Person Information

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL
State ID Home

	Person Record being reviewed.	Master Person Record [ State ID: 8744871678 - 94.0 ] <a href="#">Add Note</a>
First Name:	Tom	Thomas
Last Name:	Teacher	Teacher
Middle Name:		
Suffix:		
Alt Last Name:		
Date of Birth:	07/29/1970	07/29/1970
Gender:	MALE	MALE
SSN:	666121234	904115123
Ethnicity Indicator:	Non-Hispanic/Latino	Non-Hispanic/Latino
Ethnicity/Race:	White	White
Race 2 Code:		
Race 3 Code:		
Race 4 Code:		
Race 5 Code:		
District:	105802-TEXAS PREPARATORY SCHOOL	105802-TEXAS PREPARATORY SCHOOL
School:	105802041-TEXAS PREPARATORY SCHOOL	105802041-TEXAS PREPARATORY SCHOOL
Res District:		
Grade:	Unknown	Unknown
School Year:	2013	2013
Source System:	Default	Default
Local ID:	123456	234234
State ID:		8744871678
Alternate Id		
Alternate Source		
Serial #	2280	2279
Created:	04/29/2013	04/29/2013
Last Updated	04/29/2013	04/29/2013
Comments	8744871678, 7242687675, 6143427739, ← Multiple Matches	
Match Notes		

Assign Selected
Create New ID
Cancel Record
Return to List of Near Matches

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### 5.5.2 Twins Rule

If a match is found and the district code between the submitted record and a master record is the same, but the local ID is different, the result is a near match, as illustrated below:

Compare Person Information			
Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL			<a href="#">State ID Home</a>
	Person Record being reviewed.	Master Person Record [ State ID: 2648647422 - 97.0 ]	<a href="#">Add Note</a>
First Name:	Timothy	Timothy	
Last Name:	Schoolhouse	Schoolhouse	
Middle Name:	Ronald	Ronald	
Suffix:			
Alt Last Name:			
Date of Birth:	08/04/1996	08/04/1996	
Gender:	MALE	MALE	
SSN:	903451234	903451234	
Ethnicity Indicator:	Non-Hispanic/Latino	Non-Hispanic/Latino	
Ethnicity/Race:	White	White	
Race 2 Code:			
Race 3 Code:			
Race 4 Code:			
Race 5 Code:			
District:	105802-TEXAS PREPARATORY SCHOOL	105802-TEXAS PREPARATORY SCHOOL	
School:	105802041-TEXAS PREPARATORY SCHOOL	105802041-TEXAS PREPARATORY SCHOOL	
Res District:			
Grade:	10	10	
School Year:	2013	2013	
Source System:	Default	Default	
Local ID:	123456789	178936995417	
State ID		2648647422	
Alternate Id			
Alternate Source			
Serial #	2030	2029	
Created:	04/19/2013	04/11/2013	
Last Updated	04/19/2013	04/19/2013	
Comments	2648647422;		
Match Notes	Twins Rule		
<input type="button" value="Assign Selected"/> <input type="button" value="Create New ID"/> <input type="button" value="Cancel Record"/> <input type="button" value="Return to List of Near Matches"/>			

### 5.5.3 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:

Compare Person Information		
Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL		<a href="#">State ID Home</a>
	Person Record being reviewed.	Master Person Record [ State ID: 7247711663 - 88.0 ] <a href="#">Add Note</a>
First Name:	Jane	Jane
Last Name:	Doe	Doe
Middle Name:		
Suffix:		
Alt Last Name:		
Date of Birth:	10/10/1999	10/10/1999
Gender:	FEMALE	FEMALE
SSN:	<b>666124454</b>	<b>666579787</b>
Ethnicity Indicator:	Non-Hispanic/Latino	Non-Hispanic/Latino
Ethnicity/Race:	White	White
Race 2 Code:		
Race 3 Code:		
Race 4 Code:		
Race 5 Code:		
District:	105802-TEXAS PREPARATORY SCHOOL	105802-TEXAS PREPARATORY SCHOOL
School:	105802041-TEXAS PREPARATORY SCHOOL	105802041-TEXAS PREPARATORY SCHOOL
Res District:		
Grade:	6	6
School Year:	2013	2013
Source System:	Default	Default
Local ID:	122333	122333
State ID		<b>7247711663</b>
Alternate Id		
Alternate Source		
Serial #	2081	2036
Created:	04/19/2013	04/19/2013
Last Updated	04/19/2013	04/19/2013
Comments	7247711663	
Match Notes	<b>SSN No Match</b>	
Update Master	<input checked="" type="radio"/> Yes <input type="radio"/> No	
<a href="#">Assign Selected</a> <a href="#">Create New ID</a> <a href="#">Cancel Record</a> <a href="#">Return to List of Near Matches</a>		

In the example above, since the only data element that is different is the SSN, then the persons are most likely the same. If the user determines 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 Update Master.</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>



Compare Person Information		
Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL		<a href="#">State ID Home</a>
	Person Record being reviewed.	Master Person Record [ State ID: 7247711663 - 88.0 ] <a href="#">Add Note</a>
First Name:	Jane	Jane
Last Name:	Doe	Doe
Middle Name:		
Suffix:		
Alt Last Name:		
Date of Birth:	10/10/1999	10/10/1999
Gender:	FEMALE	FEMALE
SSN:	666158798	666579787
Ethnicity Indicator:	Non-Hispanic/Latino	Non-Hispanic/Latino
Ethnicity/Race:	White	White
Race 2 Code:		
Race 3 Code:		
Race 4 Code:		
Race 5 Code:		
District:	105802-TEXAS PREPARATORY SCHOOL	105802-TEXAS PREPARATORY SCHOOL
School:	105802041-TEXAS PREPARATORY SCHOOL	105802041-TEXAS PREPARATORY SCHOOL
Res District:		
Grade:	6	6
School Year:	2013	2013
Source System:	Default	Default
Local ID:	321321	122333
State ID		7247711663
Alternate Id		
Alternate Source		
Serial #	2082	2036
Created:	04/19/2013	04/19/2013
Last Updated	04/19/2013	04/19/2013
Comments	7247711663:	
Match Notes	SSN No Match	
Update Master	<input checked="" type="radio"/> Yes <input type="radio"/> No	
<a href="#">Assign Selected</a> <a href="#">Create New ID</a> <a href="#">Cancel Record</a> <a href="#">Return to List of Near Matches</a>		

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

### 5.5.4 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:

Compare Person Information		
Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL		<a href="#">State ID Home</a>
	<b>Person Record being reviewed.</b>	<b>Master Person Record [ State ID: 3637156881 - 88.0 ] <a href="#">Add Note</a></b>
	A potential duplicate near match exists for this record in at least one other batch. Batch Number(s):177	
First Name:	John	Jack
Last Name:	Student	Schoolkid
Middle Name:		
Suffix:		
Alt Last Name:		
Date of Birth:	08/25/2001	10/10/2005
Gender:	MALE	MALE
SSN:	932164444	932164444
Ethnicity Indicator:	Non-Hispanic/Latino	Non-Hispanic/Latino
Ethnicity/Race:	White	Asian
Race 2 Code:		
Race 3 Code:		
Race 4 Code:		
Race 5 Code:		
District:	105802-TEXAS PREPARATORY SCHOOL	105802-TEXAS PREPARATORY SCHOOL
School:	105802041-TEXAS PREPARATORY SCHOOL	105802041-TEXAS PREPARATORY SCHOOL
Res District:		
Grade:	3	2
School Year:	2013	2013
Source System:	Default	SIS
Local ID:	615758988995	875479797455
State ID		3637156881
Alternate Id		
Alternate Source		
Serial #	2034	2033
Created:	04/19/2013	04/19/2013
Last Updated	04/19/2013	04/19/2013
Comments	3637156881;	
Match Notes	SSN Match	
Update Master	<input checked="" type="radio"/> Yes <input type="radio"/> No	
<a href="#">Assign Selected</a> <a href="#">Create New ID</a> <a href="#">Cancel Record</a> <a href="#">Return to List of Near Matches</a>		

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

IF:	THEN:
The SSN is not correct for your person in your district source system, for the submitted record ( <b>Person Record being reviewed</b> ).	<ol style="list-style-type: none"><li>1. Click <b>Cancel Record</b></li><li>2. Correct the SSN in the source system.</li><li>3. Resubmit/re-enter the record</li></ol>
The person record submitted has the correct SSN.	<ol style="list-style-type: none"><li>1. Click <b>Cancel Record</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 as shown below. In this example, the user updated the SSN on the master record after the near match was created.

Compare Person Information		
Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL		<a href="#">State ID Home</a>
Person Record being reviewed.		Master Person Record [ State ID: 3637156881 - 88.0 ] <a href="#">Add Note</a>
A potential duplicate near match exists for this record in at least one other batch. Batch Number(s):177		
First Name:	John	Jack
Last Name:	Student	Schoolkid
Middle Name:		
Suffix:		
Alt Last Name:		
Date of Birth:	08/25/2001	10/10/2005
Gender:	MALE	MALE
SSN:	932164444	922548888
Ethnicity Indicator:	Non-Hispanic/Latino	Non-Hispanic/Latino
Ethnicity/Race:	White	Asian
Race 2 Code:		
Race 3 Code:		
Race 4 Code:		
Race 5 Code:		
District:	105802-TEXAS PREPARATORY SCHOOL	105802-TEXAS PREPARATORY SCHOOL
School:	105802041-TEXAS PREPARATORY SCHOOL	105802041-TEXAS PREPARATORY SCHOOL
Res District:		
Grade:	3	2
School Year:	2013	2013
Source System:	Default	SIS
Local ID:	615758988995	875479797455
State ID		3637156881
Alternate Id		
Alternate Source		
Serial #	2034	2035
Created:	04/19/2013	04/19/2013
Last Updated	04/19/2013	04/19/2013
Comments	3637156881;	Please note that the information for this ID has changed after the application created this near match/duplicate.
Match Notes	SSN Match	
Update Master	<input checked="" type="radio"/> Yes <input type="radio"/> No	
<a href="#">Assign Selected</a> <a href="#">Create New ID</a> <a href="#">Cancel Record</a> <a href="#">Return to List of Near Matches</a>		

## 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 state ID 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 Twins Rule or SSN Rule. This information may help the user 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:

**Resolve Near Matches / Duplicates**

Current Login: Michele.Elledge Location: 105802-Texas Preparatory School [State ID Home](#)

Person Record to Review and Select.									
Last Name	First Name	Middle Name	Alt Last Name	Suffix	Date Of Birth	Gender	District	School	Local ID
Doe	Jane				10/10/1999	FEMALE	105802	105802041	321321

[Assign Selected](#) [Create New ID](#) [Cancel Record](#) [Select Another Record](#)

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 checked="" type="radio"/> Doe	Jane				10/10/1999	FEMALE	105802	105802041	122333	88 [NEAR MATCH]

TSDS | [Help Desk](#) | [Exit](#)

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If the school code link is clicked, the school information is displayed as illustrated below:

SCHOOL INFORMATION	
District	105802
District Name	TEXAS PREPARATORY SCHOOL
School	AAA
School Name	TEXAS PREPARATORY SCHOOL
Street	400 UHLAND RD
City	SAN MARCOS
State	TX
Zip	78666
Contact	Stan Superintndent
Title	SUPERINTENDENT
Phone	123-123-1234
Fax	123-123-1235
Email	superinendent@school.com

Close Window

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

TSDS | Help Desk | Exit


TSDS Unique ID

**Resolve Near Matches / Duplicates**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL
 State ID Home

Person Record to Review and Select.									
Last Name	First Name	Middle Name	Alt Last Name	Suffix	Date Of Birth	Gender	District	School	Local ID
Doe	Jane				10/10/1999	FEMALE	105802	105802041	321321

Assign Selected
Create New ID
Cancel Record
Select Another Record

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"/> Doe	Jane				10/10/1999	FEMALE	105802	105802041	122333	88 [NEAR MATCH]

TSDS | Help Desk | Exit

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

## 5.6 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 the user cancels 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 record(s), check the box(es) to the left of the record(s) that is/are to be canceled and then click **Cancel All Checked Records**. To cancel all records displayed 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. Clicking **Cancel All Checked Records** only cancels those records that are selected.

## 5.7 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:

The screenshot displays the 'Resolve Near Matches / Duplicates' interface. At the top, there's a header with 'tsds texas student data system' and 'TSDS Unique ID'. Below this, a navigation bar contains 'TSDS | Help Desk | Exit'. The main content area has a title 'Resolve Near Matches / Duplicates' and a sub-header 'Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL'. There are three buttons: 'Select All On Page', 'Cancel All Checked Records', and 'Cancel All Near Match Records For This Batch'. A 'Last Name' search box with a 'Filter Results' button is present. The table below lists three records:

Last Name	First Name	Middle Name	Alt Last Name	Suffix	Date Of Birth	Gender	District	School	Res District	Local ID	
Freshman	Freida				06/10/1998	MALE	105802	105802041		987654321	Review and Select
Student	John				10/25/2004	MALE	105802	105802041		615758988995	Review and Select
Student	Jane				12/29/1998	FEMALE	105802	105802041		167847772313	Review and Select

At the bottom, it says 'Displaying 1 to 3 of 3' and includes navigation buttons 'First', 'Prev', 'Next', and 'Last'. The footer contains 'TSDS | Help Desk | Exit', 'Copyright 2007-2012 Texas Education Agency (TEA). All Rights Reserved.', and 'Copyright © 2012, eScholar LLC'.

Example of the list with a filter of "Student":

**Resolve Near Matches / Duplicates**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL

[State ID Home](#)

☐ Select All On Page [Cancel All Checked Records](#) [Cancel All Near Match Records For This Batch](#)

Last Name: Student [Filter Results](#)

Last Name	First Name	Middle Name	Alt Last Name	Suffix	Date Of Birth	Gender	District	School	Res District	Local ID	Next Action
Student	John				10/25/2004	MALE	105802	105802041		615758988995	<a href="#">Download State ID</a>

Displaying 1 to 1 of 1

[First](#) [Prev](#) [Next](#) [Last](#)

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## 5.8 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 State ID Home page displays the status of the batch as “ID Assigned” and **Download State ID** in the **Next Action** column.

**State ID Home**

Current Login: Michele.Elledge Location: 105802 - TEXAS PREPARATORY SCHOOL

[State ID Home](#)

**MENU**

- Upload Batch File
- Enter Individual Person
- Batch Search
- Extract & Download Batch
- Download By Location
- Exit Application

Submission Type: All Processing Stage: All Sort: Upload Date Desc [Filter Results](#)

From: 03/07/2013 To: 04/22/2013

District: TEXAS PREPARATORY SCHOOL [ 105802 ] School:

Find Batch:  [Search](#)

Upload Date	Batch Info	District	School	Status	Record Count	Next Action
04/15/2013	165	105802	AAA	IDs Assigned	8	<a href="#">Download State ID</a>

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

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



[TSDS](#) | [Help Desk](#) | [Exit](#)

 **tsds** texas student data system

TSDS Unique ID

**Download ID**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL [State ID Home](#)

Upload Date	Batch Info	Status	Record Count	Next Action
04/15/2013	<a href="#">165</a>	File Extract Complete. Click <a href="#">here</a> to download the file.	8	<a href="#">Return To State ID Home</a>

[TSDS](#) | [Help Desk](#) | [Exit](#)

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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.

## 6 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 the user 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.

### 6.1 Entering Individual Persons

To enter persons, perform the following steps:

- Click the **Enter Individual Person** link on the **Menu**.
- Complete the **Person Data Entry** form:

TSOS | Help Desk | Exit

tsds texas student data system

TSDS Unique ID

Enter Individual Person

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL State ID Home

Person Data Entry

General Information	Enrollment Information
First Name:*	Grade:*
Middle Name:	School:*
Last Name:*	District:*
Alt Last Name:	Res District:
Suffix:	School Years:*
Gender:*	Local ID:*
Date Of Birth:*	Source System:*
Ethnicity Indicator:*	Alternate ID:
Ethnicity/Race:*	Alternate Source:
Race 2 Code:	
Race 3 Code:	
Race 4 Code:	
Race 5 Code:	
SSN:*	

Required Fields Assign State ID Clear

TSOS | Help Desk | Exit

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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. (i.e. 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

Once the form has been completed, including all required fields, click **Assign State ID**.

## 6.2 Validating and Fixing Data

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

The screenshot displays the 'Enter Individual Person' form in the TSDS Unique ID system. The form is titled 'Enter Individual Person' and includes a 'System Message' section with a red error message: 'The person information has not been updated. Validation errors.' Below this, the form is divided into two main sections: 'General Information' and 'Enrollment Information'. The 'General Information' section contains fields for First Name, Middle Name, Last Name, Alt Last Name, Suffix, Gender, Date of Birth, Ethnicity Indicator, Ethnicity/Race, Race 2 Code, Race 3 Code, Race 4 Code, Race 5 Code, and SSN. The 'Enrollment Information' section contains fields for Grade, School, District, Res District, School Year, Local ID, Source System, Alternate ID, and Alternate Source. Several fields have red error messages next to them, indicating validation failures. At the bottom of the form, there is a 'Customer Defined Fields' section and a row of buttons: 'Required Fields', 'Assign State ID', and 'Clear'. The footer of the page includes the TSDS logo, the Texas Education Agency (TEA) copyright notice, and the page number.

General Information		Enrollment Information	
First Name: *	Sally	Grade: *	* Invalid: Required
Middle Name:		School: *	* Invalid: Required
Last Name: *	Student	District: *	* Invalid: Required
Alt Last Name:		Res District:	
Suffix:		School Year: *	* Invalid: Required
Gender: *	* Invalid: Required	Local ID: *	* Invalid: Required
Date Of Birth: *	01 / 01 / 1999	Source System: *	Default
Ethnicity Indicator: *	* Invalid Ethnicity Indicator * Ethnicity Indicator is invalid for selected grade level.	Alternate ID:	
Ethnicity/Race: *	* At least one race should be selected when race code is required.	Alternate Source:	
Race 2 Code:		Customer Defined Fields	
Race 3 Code:			
Race 4 Code:			
Race 5 Code:			
SSN: *	* SSN is not present		

Required Fields Assign State ID Clear

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

## 6.3 Assigning IDS

The TSDS Unique ID system takes the **Enter Individual Person** 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 the determines a status of match, near match, or no match during the ID Assignment process.

## 6.4 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 by the user.

## 6.5 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 Student**.

The screenshot shows the TSDS Unique ID assignment interface. At the top, there is a blue header with the TSDS logo and the text "TSDS Unique ID". Below the header, there is a section titled "Assign ID" with a "State ID Home" button. The main content area displays a table with the following data:

Upload Date	Batch Info	Status	Number of Records	Next Action
04/23/2013	193	ID Assigned. New State ID Created for the Person is 6945636453 Click <a href="#">here</a> to download records.	1	Enter Another Person

At the bottom of the interface, there is a footer with the text "Copyright 2007-2012 Texas Education Agency (TEA). All Rights Reserved." and "Copyright © 2012, eScholar LLC".

The user can obtain the Unique ID that is assigned from the Status column or can download the file by clicking the **here** link in that Status column.

## 7 Person Search

You can search for persons online by clicking the **Person Search** link in the **Menu**:

- This feature allows the user to:
- Search for persons
- View person information
- Edit person information
- Add Person Notes

The screenshot shows the TSDS Unique ID web application interface. At the top, there is a blue header bar with 'TSDS | Help Desk | Exit' on the right. Below this is a light blue banner with the 'tsds' logo (texas student data system) on the left and 'TSDS Unique ID' on the right. The main content area is titled 'Search Individual Person' and includes a 'State ID Home' button. Below the title, there are four tabs: 'Simple Search', 'Advanced Search', 'State ID Search', and 'Alternate ID Search'. The 'Simple Search' tab is active, showing fields for 'First Name', 'Middle Name', 'Last Name', and 'Suffix'. Below these is a 'Date Of Birth' field with dropdowns for month (mm), day (dd), and year (yyyy). A 'Search' button and a 'Clear' button are at the bottom of the form. A footer bar at the bottom contains 'TSDS | Help Desk | Exit', 'Copyright 2007-2012 Texas Education Agency (TEA). All Rights Reserved.', and 'Copyright © 2012, eScholar LLC'.

- View Person Notes

### 7.1 Searching for a Person

To search for persons perform the following:

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

#### 7.1.1 Simple 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.

### 7.1.2 Advanced Search

**Advanced Search** allows the user to search for a person using all available fields.

The screenshot displays the 'Search Individual Person' interface. At the top, there's a navigation bar with 'TSDS | Help Desk | Exit'. Below it, the 'tsds' logo and 'texas student data system' are on the left, and 'TSDS Unique ID' is on the right. The main section is titled 'Search Individual Person' and shows the current login as 'Michele.Elledge' at '105802-TEXAS PREPARATORY SCHOOL'. There are four tabs: 'Simple Search', 'Advanced Search' (which is active), 'State ID Search', and 'Alternate ID Search'. The 'Advanced Search' form contains two columns of fields. The left column includes: First Name, Middle Name, Last Name, Alt Last Name, Suffix, Gender, Date of Birth (with mm/dd/yyyy dropdowns), Ethnicity Indicator, and five Race Code fields. The right column includes: Grade, School, District, Res District, Local ID, and Source System. A 'Search' button and a 'Clear' button are at the bottom of the form. A footer bar contains 'TSDS | Help Desk | Exit', copyright text 'Copyright 2007-2012 Texas Education Agency (TEA). All Rights Reserved.', and 'Copyright © 2012, eScholar LLC'.

### 7.1.3 State ID Search

**State ID Search** allows you to search for persons by State ID.

The screenshot displays the 'Search Individual Person' interface with the 'State ID Search' tab selected. The navigation bar and header are identical to the previous screenshot. The 'State ID Search' tab is active, showing a single input field for 'State ID' and a 'Search' button. The other tabs ('Simple Search', 'Advanced Search', 'Alternate ID Search') are visible but not active. The footer bar remains the same, showing 'TSDS | Help Desk | Exit', copyright text, and 'Copyright © 2012, eScholar LLC'.

### 7.1.4 Alternate ID Search

**Alternate ID Search** allows the user to find persons by alternate ID or local ID.

Search Individual Person ?

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL [State ID Home](#)

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

Source:

\* Alternate ID:

\* Required Fields

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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.

## 7.2 Viewing the Search Results

After **Search** is clicked, the system displays the search results. This can include **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.

Search Individual Person ?

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL [State ID Home](#)

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

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

Date Of Birth: mm / dd / yyyy

\* Required Fields

**No records found.**


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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:



TSDS | Help Desk | Exit



TSDS Unique ID

**Search Individual Person**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL
State ID Home

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

\* First Name:

Middle Name:

\* Last Name:

Suffix:

Date Of Birth:  /  /

\*Required Fields

**Search Results**

State ID	Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District	School	Ethnicity Indicator	Race (s)	SSN	Match Probability
9874231874	Freshman	Freida			06/10/1998	MALE	105802	105802041	Hispanic/Latino	Asian	666124505	75
2163719421	Freshman	Freddie			06/10/1998	MALE	105802	105802041	Hispanic/Latino	Asian	901123457	72

TSDS | Help Desk | Exit  
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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 one result is returned with and the **Match Probability** is 77.

The screenshot shows the 'Search Individual Person' interface. The 'Simple Search' tab is active. The search criteria are: First Name: Fred, Last Name: Freshman. The Date of Birth is not entered. The search results table shows one result with a Match Probability of 77.

State ID	Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District	School	Ethnicity Indicator	Race (s)	SSN	Match Probability
2163719421	Freshman	Freddie			06/10/1998	MALE	105802	105802041	Hispanic/Latino	Asian	901123457	77


**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** is 98; this is a Match.

The screenshot shows the 'Search Individual Person' interface. The 'Simple Search' tab is active. The search criteria are: First Name: Freddie, Last Name: Freshman, Date Of Birth: 06/10/1998. The search results table shows two results with Match Probabilities of 98 and 86.

State ID	Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District	School	Ethnicity Indicator	Race (s)	SSN	Match Probability
2163719421	Freshman	Freddie			06/10/1998	MALE	105802	105802041	Hispanic/Latino	Asian	666124585	98 [MATCH]
9874231874	Freshman	Freida			06/10/1998	MALE	105802	105802041	Hispanic/Latino	Asian	901123457	86

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 the security profile of the user).

TSDS | Help Desk | Exit


TSDS Unique ID

---

**Search Individual Person**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL
 State ID Home

Simple Search
Advanced Search
State ID Search
Alternate ID Search

\* First Name:

Middle Name:

\* Last Name:

Suffix:

Date Of Birth:  /  /

\* Required Fields
 Search
Clear
Enter New Person


Search Results												
State ID	Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District	School	Ethnicity Indicator	Race (s)	SSN	Match Probability
5514694682	<a href="#">Student</a>	<a href="#">John</a>			10/01/1996	MALE	227901	<a href="#">227901002</a>	Non-Hispanic/Latino	White	924515798	80

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When results are returned, perform the following:

To view more detailed information about the person, click the hyperlink in the **Last Name** or **First Name** column. Upon clicking the hyperlink, the **Search Individual Person** information page is displayed. The **Search Individual Person** information page displays the person's current information.

TSDS | Help Desk | Exit


TSDS Unique ID

---

**Search Individual Person**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL
 State ID Home

Person Information: [State ID : 2163719421] Created: 04/12/2013 [Add Note](#)

General Information

First Name:	Freddie
Middle Name:	
Last Name:	Freshman
Alt Last Name:	
Suffix:	
Gender:	MALE
Date Of Birth:	06/10/1998
Ethnicity Indicator:	Hispanic/Latino
Ethnicity/Race:	Asian
Race 2 Code:	
Race 3 Code:	
Race 4 Code:	
Race 5 Code:	
SSN:	666124585

Enrollment Information


Grade:	09
School:	105802041 TEXAS PREPARATORY SCHOOL
District:	105802 TEXAS PREPARATORY SCHOOL
Res District:	
Sch Yr:	2013
Local ID:	987654321
Source System:	Default
Alternate ID:	
Alternate Source:	

<div style="text-align: center; font-weight: bold; font-size: 10pt;">Batch Information</div> <table style="width: 100%;"> <tr><td>Last Batch #:</td><td>157</td></tr> <tr><td>Last Updated:</td><td>04/12/2013</td></tr> <tr><td>Update Ref #:</td><td><a href="#">1996</a></td></tr> </table>	Last Batch #:	157	Last Updated:	04/12/2013	Update Ref #:	<a href="#">1996</a>	<div style="display: flex; justify-content: space-around;"> <span>Edit Person</span> <span>Back To Search Results</span> </div>
Last Batch #:	157						
Last Updated:	04/12/2013						
Update Ref #:	<a href="#">1996</a>						

A section named **Associated Retired IDs Information** is on bottom of the results page. This section displays any IDs along with the person information that have been retired and associated to the ID under review.

1. The user can view additional information, edit the person, return to the search results or return to the home page.
2. The user can view additional information about the record by clicking the link in the **Update Ref #** field or the **History Date** column.

[TSDS](#) | [Help Desk](#) | [Exit](#)


TSDS Unique ID

---

**Search Individual Person**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL [State ID Home](#)

Person Information: [State ID : 9874231874] Created: 04/23/2013 [Add Note](#)

General Information	
First Name:	Freida
Middle Name:	
Last Name:	Freshman
Alt Last Name:	
Suffix:	
Gender:	FEMALE
Date Of Birth:	06/10/1998
Ethnicity Indicator:	Hispanic/Latino
Ethnicity/Race:	Asian
Race 2 Code:	
Race 3 Code:	
Race 4 Code:	
Race 5 Code:	
SSN:	901123457

Enrollment Information	
Grade:	09
School:	105802041 TEXAS PREPARATORY SCHOOL
District:	105802 TEXAS PREPARATORY SCHOOL
Res District:	
Sch Yr:	2013
Local ID:	987654321
Source System:	Default
Alternate ID:	
Alternate Source:	

Batch Information	
Last Batch #:	194
Last Updated:	04/24/2013
Update Ref #:	<a href="#">2107</a>

[Edit Person](#)   [Back To Search Results](#)

History Information											
History Date	Last Name	First Name	Middle Name	Suffix	Gender	Date Of Birth	Ethnicity Indicator	Race(s)	SSN	District	School
<a href="#">04/23/2013</a>	Freshman	Freida			MALE	06/10/1998	Hispanic/Latino	Asian	901123457	105802	<a href="#">105802041</a>
<a href="#">04/24/2013</a>	Freshman	Freida			MALE	10/01/1998	Non-Hispanic/Latino	White	901123457	105802	<a href="#">105802041</a>

Associated Retired ID's Information											
Retired Id	Last Name	First Name	Middle Name	Suffix	Gender	Date Of Birth	Ethnicity Indicator	Race(s)	SSN	District	School
1823542166	Freshman	Freida			MALE	10/01/1998	Non-Hispanic/Latino	White	901123457	105802	<a href="#">105802041</a>

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**Screenshot from History Date link:**

History Date: 04/24/2013 Created: 04/24/2013	
<b>General Information</b>	
First Name:	Freda
Middle Name:	
Last Name:	Freshman
Alt Last Name:	
Suffix:	
Gender:	MALE
Date Of Birth:	10/01/1998
Ethnicity Indicator:	Non-Hispanic/Latino
Ethnicity/Race:	White
Race 2 Code:	
Race 3 Code:	
Race 4 Code:	
Race 5 Code:	
<b>Enrollment Information</b>	
Grade:	09
School:	105802041 TEXAS PREPARATORY SCHOOL
District:	105802 TEXAS PREPARATORY SCHOOL
Res District:	
Sch Yr:	2013
Local ID:	1648977
Source System:	SIS
Alternate ID:	
Alternate Source:	
<b>Batch Information</b>	
Last Batch #:	195
Last Updated:	04/24/2013
Update Ref #:	2108

[Close Window](#)

Screenshot from Update Ref #: link:

Search Input Record	
Person Information [ Reference No : 2107 ]	
<b>General Information</b>	
First Name:	Freida
Middle Name:	
Last Name:	Freshman
Alt Last Name:	
Suffix:	
Gender:	FEMALE
Date Of Birth:	06/10/1998
Ethnicity Indicator:	Hispanic/Latino
Ethnicity/Race:	Asian
Race 2 Code:	
Race 3 Code:	
Race 4 Code:	
Race 5 Code:	
State ID:	9874231874
SSN:	901123457
<b>Enrollment Information</b>	
Grade:	09
School:	105802-105802041 TEXAS PREPARATORY SCHOOL
District:	105802
Res District:	
Sch Yr:	2013
Local ID:	987654321
Source System:	Default
Alternate ID:	
Alternate Source:	
<b>Batch Information</b>	
Batch Number:	194
Input Type:	EDIT
Created By:	Michele.Elledge
Created:	04/24/2013
Last Updated:	04/24/2013
Status:	PERSON UPDATED AND HISTORY CREATED - DIRECT EDIT
Processed:	04/24/2013
Comments:	ID Updated - Direct Edit
<input type="button" value="Close Window"/>	

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

## 7.3 Editing a Person Record

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

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


### AND

The person is in the user's district and/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.

TSDS | Help Desk | Exit



TSDS Unique ID

---

**Search Individual Person**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL State ID Home

Person Information: [State ID : 9874231874] Created: 04/23/2013 [Add Note](#)

General Information										Enrollment Information	
First Name:	Freida									Grade:	08
Middle Name:										School:	105802041 TEXAS PREPARATORY SCHOOL
Last Name:	Freshman									District:	105802 TEXAS PREPARATORY SCHOOL
Alt Last Name:										Res District:	
Suffix:										Sch Yr:	2013
Gender:	FEMALE									Local ID:	987654321
Date Of Birth:	06/10/1998									Source System:	Default
Ethnicity Indicator:	Hispanic/Latino									Alternate ID:	
Ethnicity/Race:	Asian									Alternate Source:	
Race 2 Code:											
Race 3 Code:											
Race 4 Code:											
Race 5 Code:											
SSN:	901123457										

Batch Information	
Last Batch #:	194
Last Updated:	04/24/2013
Update Ref #:	<a href="#">2107</a>

Edit Person
Back To Search Results

History Information										
History Date	Last Name	First Name	Middle Name	Suffix	Gender	Date Of Birth	Ethnicity Indicator	Race(s)	SSN	School
<a href="#">04/23/2013</a>	Freshman	Freida			MALE	06/10/1998	Hispanic/Latino	Asian	901123457	105802 <a href="#">105802041</a>
<a href="#">04/24/2013</a>	Freshman	Freida			MALE	10/01/1998	Non-Hispanic/Latino	White	901123457	105802 <a href="#">105802041</a>

Associated Retired ID's Information										
Retired Id	Last Name	First Name	Middle Name	Suffix	Gender	Date Of Birth	Ethnicity Indicator	Race(s)	SSN	School
1823542166	Freshman	Freida			MALE	10/01/1998	Non-Hispanic/Latino	White	901123457	105802 <a href="#">105802041</a>


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**NOTE:** *Edit Person* always displayed on the above page but may not always be enabled.

- Review the **Edit Person** page. This page displays the person record and allows the user to make corrections/additions to the information.





TSDS Unique ID

---

**Edit Person**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL
State ID Home

**Person Information**

General Information	
First Name: *	Freida
Middle Name:	
Last Name: *	Freshman
Alt Last Name:	
Suffix:	
Gender: *	FEMALE
Date Of Birth: *	06 / 10 / 1998
Ethnicity Indicator: *	Hispanic/Latino
Ethnicity/Race: *	Asian
Race 2 Code:	
Race 3 Code:	
Race 4 Code:	
Race 5 Code:	
SSN: *	901 - 12 - 3457
State ID :	9874231874

Enrollment Information	
Grade: *	9
School: *	105802041
District: *	105802
Res District:	
School Year: *	2013
Local ID: *	987654321
Source System: *	Default
Alternate ID:	
Alternate Source:	

\* Required Fields
Update Person Record
Back To Search Results


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4. Update information as necessary. **School** code and **District** code are not editable, but all other fields can be updated.
5. To save the changes, click **Update Person Record**.
  - a. To cancel the changes, click **Back to Search Results**.

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 entered by the user is an invalid, the system displays the following page:

TSDS | Help Desk | Exit



tsds texas student data system

TSDS Unique ID

**Edit Person**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL
State ID Home

**System Message**

The person information has not been updated. Validation errors.

**Person Information**

**General Information**

First Name: *	Freida
Middle Name:	
Last Name: *	Freshman
Alt Last Name:	
Suffix:	
Gender: *	FEMALE
Date Of Birth: *	06 / 10 / 1998
Ethnicity Indicator: *	Hispanic/Latino
Ethnicity/Race: *	Asian
Race 2 Code:	
Race 3 Code:	
Race 4 Code:	
Race 5 Code:	
SSN: *	666 - 66 - 6666
State ID :	9874231874

**Enrollment Information**

Grade: *	9
School: *	105802041
District: *	105802
Res District:	
School Year: *	2013
Local ID: *	987654321
Source System: *	Default
Alternate ID:	
Alternate Source:	

\* Required Fields
Update Person Record
Back To Search Results

TSDS | Help Desk | Exit

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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:

**Edit Person**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL [State ID Home](#)

**System Message**

The person record has been updated. Batch: 202. You can download this information using Extract & Download.

**Person Information**

General Information		Enrollment Information	
First Name: *	Freida	Grade: *	9
Middle Name:		School: *	105802041
Last Name: *	Freshman	District: *	105802
Alt Last Name:		Res District:	
Suffix:		School Year: *	2013
Gender: *	FEMALE	Local ID: *	987654321
Date Of Birth: *	06 / 10 / 1998	Source System: *	Default
Ethnicity Indicator: *	Hispanic/Latino	Alternate ID:	
Ethnicity/Race: *	White	Alternate Source:	
Race 2 Code:			
Race 3 Code:			
Race 4 Code:			
Race 5 Code:			
SSN: *	901 - 12 - 3457		
State ID :	9874231874		

\* Required Fields [Update Person Record](#) [Back To Search Results](#)

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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, the user can download the record they updated in the extract & download batch module.

## 7.4 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. Upon clicking the hyperlinks, the **Person Search** information page is displayed.

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TSDS Unique ID

**Search Individual Person**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL
[State ID Home](#)

Person Information: [State ID : 9874231874]
Created: 04/23/2013 [Add Note](#)

**General Information**

First Name:	Freida
Middle Name:	
Last Name:	Freshman
Alt Last Name:	
Suffix:	
Gender:	FEMALE
Date Of Birth:	06/10/1998
Ethnicity Indicator:	Hispanic/Latino
Ethnicity/Race:	Asian
Race 2 Code:	
Race 3 Code:	
Race 4 Code:	
Race 5 Code:	
SSN:	901123457

**Enrollment Information**

Grade:	09
School:	105802041 TEXAS PREPARATORY SCHOOL
District:	105802 TEXAS PREPARATORY SCHOOL
Res District:	
Sch Yr:	2013
Local ID:	987654321
Source System:	Default
Alternate ID:	
Alternate Source:	

**Batch Information**

Last Batch #:	194
Last Updated:	04/24/2013
Update Ref #:	<a href="#">2107</a>

[Edit Person](#)
[Back To Search Results](#)

**History Information**

History Date	Last Name	First Name	Middle Name	Suffix	Gender	Date Of Birth	Ethnicity Indicator	Race(s)	SSN	District	School
<a href="#">04/23/2013</a>	Freshman	Freida			MALE	06/10/1998	Hispanic/Latino	Asian	901123457	105802	<a href="#">105802041</a>
<a href="#">04/24/2013</a>	Freshman	Freida			MALE	10/01/1998	Non-Hispanic/Latino	White	901123457	105802	<a href="#">105802041</a>

**Associated Retired ID's Information**

Retired Id	Last Name	First Name	Middle Name	Suffix	Gender	Date Of Birth	Ethnicity Indicator	Race(s)	SSN	District	School
1823542166	Freshman	Freida			MALE	10/01/1998	Non-Hispanic/Latino	White	901123457	105802	<a href="#">105802041</a>

[TSDS](#) | [Help Desk](#) | [Exit](#)

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4. Click **Add Note**.
5. The **Add Person Note** page is displayed. This page allows up to 255 characters of text.
6. Enter note text.

The screenshot shows the 'Add Person Note' page in the TSDS Unique ID system. At the top, there is a blue header with the TSDS logo and the text 'texas student data system'. To the right of the logo, it says 'TSDS Unique ID'. Below the header, there is a navigation bar with links for 'TSDS', 'Help Desk', and 'Exit'. The main content area has a title 'Add Person Note' and a sub-header 'General Note for State ID: 9874231874'. Below this, there is a text input field labeled 'Note Text:' containing the text 'This is a note for Freida Freshman.'. To the right of the input field is a 'State ID Home' button. At the bottom of the form, there are 'Save' and 'Back' buttons. The footer of the page contains copyright information: 'Copyright 2007-2012 Texas Education Agency (TEA). All Rights Reserved.' and 'Copyright © 2012, eScholar LLC'.

7. Click **Save**.
8. A confirmation page is displayed allowing the user to view the note that was added.
9. Click **Back** to return to the **Search Individual Person** page.

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

## 7.5 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, the user should:

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, a magnifying glass icon is displayed to the right of the Person Information and ID in the top row of the details.
4. Click the magnifying glass icon to view the notes.
5. A new window opens displaying 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.

Admin Notes		General Notes	
<b>Freida Freshman [State ID: 9874231874]</b>			
Creation User ID	Creation Date	Note Text	Note Type
Michele.Elledge	04/24/2013	This is a note for Freida Freshman.	General
<input type="button" value="Close Window"/>			

## 8 Batch Search

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

This feature allows the user to:

- Search for students with 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 will search against the current information for Persons 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.*

### 8.1 Searching for Persons with a Batch File

The **Batch Search** feature requires that a TSDS Unique ID person file is uploaded into the system. The format/structure of the search file is 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 the user may choose to use batch search instead of person search is:

If an LEA only wants to assign Unique IDs once a week, they 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 goes thru the same logic as if the user is 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**.
3. Click on the **Basic** or **Advanced** tab based on the search to be performed.

### 8.1.1 Basic Batch Search

The screenshot shows the 'Basic' tab of the 'Upload Batch File' form. The header includes the TSDS logo and 'TSDS Unique ID'. The current login is 'Michele.Elledge' at '105802-TEXAS PREPARATORY SCHOOL'. A 'State ID Home' button is visible. The 'File to Upload' field has a 'Browse...' button and an 'Upload' button. The footer contains copyright information for the Texas Education Agency (TEA) and eScholar LLC.

### 8.1.2 Advanced Batch Search

The screenshot shows the 'Advanced' tab of the 'Upload Batch File' form. The header is identical to the Basic tab. The 'Template' is set to 'eScholar Uniq-ID® v2.1'. The 'File to Upload' field has a 'Browse...' button. The 'Delimiter' is set to 'TAB'. The 'Qualifier' is set to a dropdown menu. The 'Source System' is set to a dropdown menu. The 'Ignore First Row' option is set to 'No'. The 'Filters' section includes checkboxes for 'District', 'School', 'Grade', 'Date Of Birth', and 'School Year'. An 'Upload' button is at the bottom. The footer contains copyright information for the Texas Education Agency (TEA) and eScholar LLC.

4. Click **Browse** and select the file from your desktop; complete the upload form as necessary.
  - a. 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.
  - b. The **Filters** capability removes matches from the results where the selected field does not match the potential match. This capability allows the user to select one or many filters to apply to the batch search, and if the submission record does not match the value(s) 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.

5. Click **Upload**.

- a. The system analyzes the file, similar to the process described in the **File Upload** section above and display any file errors.
- b. If a file error is found during the processing, 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**.

6. 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**.

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

**Batch Search**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL [State ID Home](#)

[Upload Batch File](#) [Extract & Download Batch](#)

From: 03/15/2013 To: 04/29/2013 Processing Stage: All [Filter Results](#)

Date	Batch Info	Status	Number Of Records	Next Action
04/29/2013	218	File Uploaded. Begin Validation Stage	2	<a href="#">Validate</a>
04/25/2013	205	Download Search results	1	<a href="#">Download</a>
04/25/2013	204	Download Search results	1	<a href="#">Download</a>

Displaying 1 to 3 of 3 [First](#) [Prev](#) [Next](#) [Last](#)

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- a. 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.
  - b. The records in the batch also auto-cancel if they include the ID.
8. The system returns to the **Batch Search** page displaying the status of the process.
9. Click **Search** to perform the search. If **Search** is not visible, click **Filter Results** to refresh the page.

**Batch Search**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL [State ID Home](#)

[Upload Batch File](#) [Extract & Download Batch](#)

From: 03/15/2013 To: 04/29/2013 Processing Stage: All [Filter Results](#)

Date	Batch Info	Status	Number Of Records	Next Action
04/29/2013	218	Search validation complete. Ready to begin search.	2	<a href="#">Search</a>
04/25/2013	205	Download Search results	1	<a href="#">Download</a>
04/25/2013	204	Download Search results	1	<a href="#">Download</a>

Displaying 1 to 3 of 3 [First](#) [Prev](#) [Next](#) [Last](#)

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10. 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:
  - a. No matching persons - The **State ID** column is blank for these types of records in the downloaded file.
  - b. A single matching person - The **State ID** column contains the State ID of the matching person for these types of records in the downloaded file.
  - c. Multiple matching persons – The record is auto-canceled and is not listed in the downloaded file.
  - d. 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 State IDs in the comments column. Please see *Extracting & Downloading Batch Search Files* at the end of this section for further instructions.

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

**Batch Search**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL [State ID Home](#)

[Upload Batch File](#) [Extract & Download Batch](#)

From: 03/15/2013 To: 04/29/2013 Processing Stage: All [Filter Results](#)

Date	Batch Info	Status	Number Of Records	Next Action
04/29/2013	218	Download Search results	1	<a href="#">Download</a>
04/25/2013	205	Download Search results	1	<a href="#">Download</a>
04/25/2013	204	Download Search results	1	<a href="#">Download</a>

Displaying 1 to 3 of 3

[First](#) [Prev](#) [Next](#) [Last](#)

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

**Download ID**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL [State ID Home](#)

Upload Date	Batch Info	Status	Record Count	Next Action
04/29/2013	218	File Extract Complete. Click <a href="#">here</a> to download the file.	1	<a href="#">Return To Search Home</a>

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

## 8.2 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 and/or **Processing Stage**. Once the selections are made, click **Filter Results**.

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL

From: 03/15/2013 To: 04/29/2013 Processing Stage: All Filter Results

Date	Batch Info	Status	Number Of Records	Next Action
04/29/2013	218	Download Search results	1	Download
04/25/2013	205	Download Search results	1	Download
04/25/2013	204	Download Search results	1	Download

Displaying 1 to 3 of 3

### 8.3 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.

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL

From: 03/15/2013 To: 04/29/2013 Processing Stage: All Filter Results

Date	Batch Info	Status	Number Of Records	Next Action
04/29/2013	218	Download Search results	1	Download
04/25/2013	205	Download Search results	1	Download
04/25/2013	204	Download Search results	1	Download

Displaying 1 to 3 of 3

By accessing the **Extract & Download** component through the **Batch Search** component, the filters 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.

As illustrated above, 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 **Extract Records** is clicked, the system displays the file download page allowing the user to download the file by clicking [here](#). Clicking **Extract Another Batch** displays the **Extract & Download Batch** page.

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**tsds** texas student data system TSDS Unique ID

**Extract & Download Batch**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL [State ID Home](#)

Upload Date	Batch Info	Status	Record Count	Next Action
04/29/2013	218	File Extract Complete. Click <a href="#">here</a> to download the file.	1	<a href="#">Extract Another Batch</a>

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TSDS | Help Desk | Exit

**tsds** texas student data system TSDS Unique ID

**Extract & Download Batch**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL [State ID Home](#)

**Submission Type:** Search **Extract Type:** IDs Found - Search **Sort:** Upload Date Desc [Filter Results](#)  
**From:** 03/15/2013 **To:** 04/29/2013

[Back To Batch Search](#) [View Download Cart](#)

Upload Date	Batch Info	Status	Record Count	Next Action
04/29/2013	218	IDs Found - Search	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/25/2013	205	IDs Found - Search	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/25/2013	204	IDs Found - Search	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>

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## 9 Extract & Download Batch

The user can download files related to the TSDS Unique ID system by clicking the **Extract & Download Batch** link in the *Menu*:

This module allows the user to:

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

### 9.1 Note: **The ability to extract and download batches is dependent on the security profile of the user. If the security profile does not permit the user to perform this function, then the Extract & Download Batch link is not displayed.**

#### **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:

1. **IDs Assigned** – includes all of the submission records with the assigned state identifiers for the batch.
2. **Near Matches** – includes all of the submission records in the near match stage for the batch.
3. **Canceled** - includes all of the submission records that were canceled for the batch.
4. **Rejected** – includes all of the submission records that were rejected for the batch.
5. **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** page, perform the following:

1. Click **Extract & Download** link on the **Menu**.
2. Select filter criteria. The following filters are available:
  - a. **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)
  - b. **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.)
  - c. **Sort:** By **Upload Date** or **Batch Number**
  - d. **From/To:** To specify date range
3. Click **Filter Results**.

**Extract & Download Batch**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL

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

From: 03/11/2013 To: 04/25/2013

District: TEXAS PREPARATORY SCHOOL [ 105802 ] School:

View Download Cart

Upload Date	Batch Info	District	School	Status	Record Count	Next Action
04/15/2013	164	105802	AAA	IDs Assigned	8	Extract Records Add To Download Cart
04/12/2013	160	105802	AAA	ID Assigned	1	Extract Records Add To Download Cart
04/12/2013	159	105802	AAA	ID Assigned	1	Extract Records Add To Download Cart
04/12/2013	158	105802	AAA	IDs Assigned	1	Extract Records Add To Download Cart
04/12/2013	157	105802	AAA	IDs Assigned	1	Extract Records Add To Download Cart
04/11/2013	155	105802	AAA	IDs Assigned	8	Extract Records Add To Download Cart
04/11/2013	154	105802	AAA	ID Assigned	1	Extract Records Add To Download Cart
04/11/2013	153	105802	AAA	ID Assigned	1	Extract Records Add To Download Cart

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4. Once the filters are applied, proceed to the **Downloading a File** instructions below.
5. The user 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.




## 9.2 Downloading a Single File

The system allows the user 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.

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tsds texas student data system

# TSDS Unique ID

Extract & Download Batch

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL
[State ID Home](#)

Submission Type: All

From: 03/11/2013

District: TEXAS PREPARATORY SCHOOL [ 105802 ]

Extract Type: IDs Assigned

To: 04/25/2013

School:

Sort: Upload Date Desc

[Filter Results](#)

[View Download Cart](#)

Upload Date	Batch Info	District	School	Status	Record Count	Next Action
04/15/2013	<span>164</span>	105802	<span>AAA</span>	IDs Assigned.	8	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/12/2013	<span>160</span>	105802	<span>AAA</span>	ID Assigned.	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/12/2013	<span>159</span>	105802	<span>AAA</span>	ID Assigned.	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/12/2013	<span>158</span>	105802	<span>AAA</span>	IDs Assigned.	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/12/2013	<span>157</span>	105802	<span>AAA</span>	IDs Assigned.	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/11/2013	<span>155</span>	105802	<span>AAA</span>	IDs Assigned.	8	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/11/2013	<span>154</span>	105802	<span>AAA</span>	ID Assigned.	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/11/2013	<span>153</span>	105802	<span>AAA</span>	ID Assigned.	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>

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- Download the file by clicking the **here** link in the **Status** column. Doing so opens a file download dialogue box that enables you to either open the file or save it to your local computer.

The screenshot displays the TSDS Unique ID web application. At the top, there is a blue header bar with links for 'TSDS', 'Help Desk', and 'Exit'. Below this, the 'tsds' logo and 'texas student data system' text are on the left, and 'TSDS Unique ID' is on the right. The main content area is titled 'Extract & Download Batch'. It shows the current login as 'Michele.Elledge' and location as '105802-TEXAS PREPARATORY SCHOOL'. A 'State ID Home' button is present. Below this is a table with columns: 'Upload Date', 'Batch Info', 'Status', 'Record Count', and 'Next Action'. The table contains one row with the following data: Upload Date '04/25/2013', Batch Info '203', Status 'File Extract Complete. Click [here](#) to download the file.', Record Count '1', and Next Action 'Extract Another Batch' button. At the bottom, there is a dark blue footer bar with the same 'TSDS | Help Desk | Exit' links, copyright information 'Copyright 2007-2012 Texas Education Agency (TEA). All Rights Reserved.', and 'Copyright © 2012, eScholar LLC'.

Upload Date	Batch Info	Status	Record Count	Next Action
04/25/2013	203	File Extract Complete. Click <a href="#">here</a> to download the file.	1	<a href="#">Extract Another Batch</a>


- To extract another batch, click **Extract Another Batch**.

### 9.3 Downloading Multiple Files

To download multiple files, perform the following steps:

- Perform steps 1 through 5 from the above Filtering the List of Downloads section.
- Click **Add to Download Cart** for the appropriate batch.

TSDS | Help Desk | Exit



TSDS Unique ID

**Extract & Download Batch**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL

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

From: 03/11/2013 To: 04/25/2013

District: TEXAS PREPARATORY SCHOOL [ 105802 ] School:

[State ID Home](#)  
[Filter Results](#)

[View Download Cart](#)

Upload Date	Batch Info	District	School	Status	Record Count	Next Action
04/15/2013	164	105802	AAA	IDs Assigned.	8	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/12/2013	160	105802	AAA	ID Assigned.	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/12/2013	159	105802	AAA	ID Assigned.	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/12/2013	158	105802	AAA	IDs Assigned.	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/12/2013	157	105802	AAA	IDs Assigned.	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/11/2013	155	105802	AAA	IDs Assigned.	8	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/11/2013	154	105802	AAA	ID Assigned.	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/11/2013	153	105802	AAA	ID Assigned.	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>


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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.

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TSDS Unique ID

**Download Cart**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL

[State ID Home](#)

Download Cart - IDs Assigned Extract Type

	Upload Date	Batch Number	Record Count
<input type="checkbox"/>	04/15/2013	164	8
<input type="checkbox"/>	04/24/2013	201	1
<input type="checkbox"/>	04/25/2013	203	1

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

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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 the **here** link in the **Status** column. Doing so opens a **File Download** dialogue box that enables you to either open the file or save it to your local computer.

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL [State ID Home](#)

Upload Date	Batch Info	Status	Record Count	Next Action
04/15/2013	201, 164, 203	File Extract Complete. Click <a href="#">here</a> to download the file.	10	<a href="#">Extract Another Batch</a>

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## 9.4 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.

The following options are available:

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

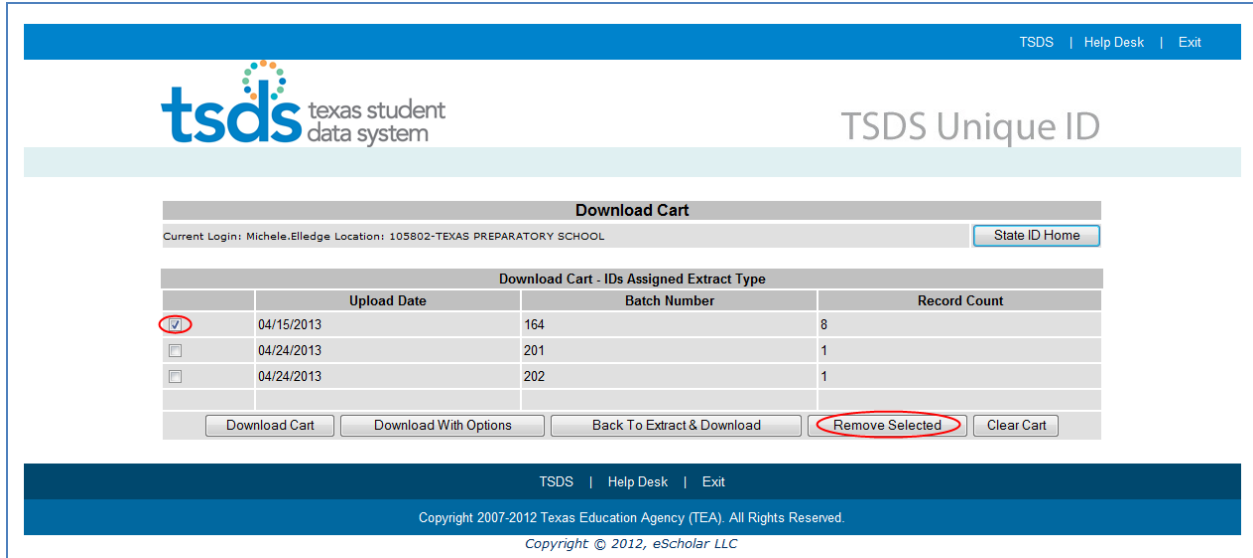
**NOTE:** The selected date format is not applied to the Canceled Extract Types. These dates are extracted in the format that they were submitted. Since the dates for this Extract Type could be invalid, the system must extract the data as it was submitted.

- e. **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**.

## 9.5 Removing Batches from the Download Cart

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



**Download Cart**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL [State ID Home](#)

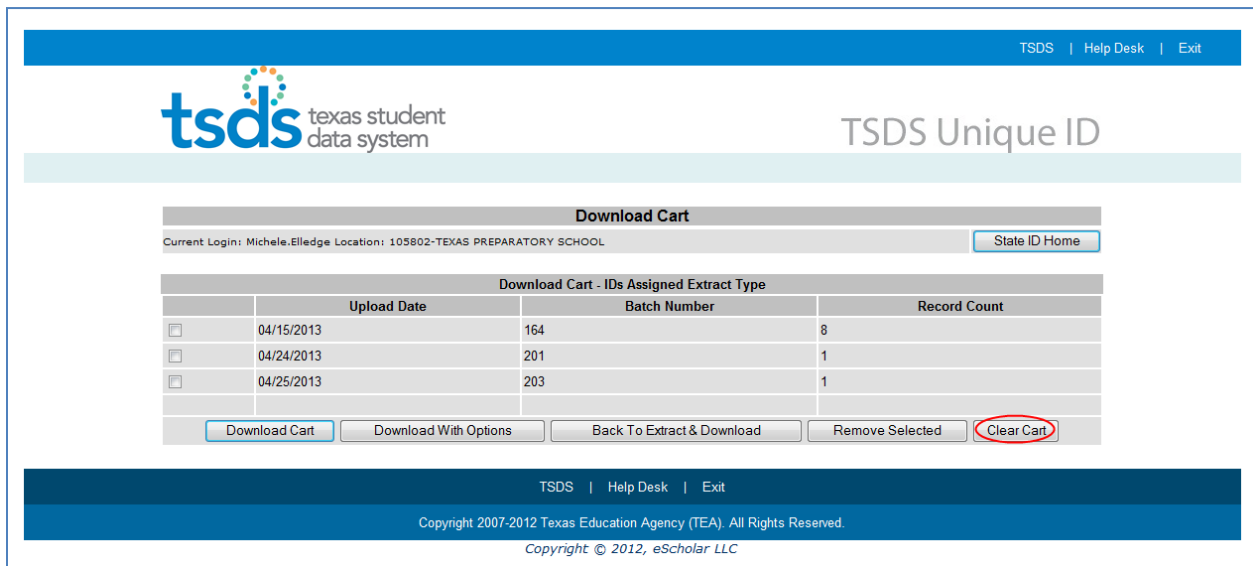
Download Cart - IDs Assigned Extract Type			
	Upload Date	Batch Number	Record Count
<input checked="" type="checkbox"/>	04/15/2013	164	8
<input type="checkbox"/>	04/24/2013	201	1
<input type="checkbox"/>	04/24/2013	202	1

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

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



**Download Cart**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL [State ID Home](#)

Download Cart - IDs Assigned Extract Type			
	Upload Date	Batch Number	Record Count
<input type="checkbox"/>	04/15/2013	164	8
<input type="checkbox"/>	04/24/2013	201	1
<input type="checkbox"/>	04/25/2013	203	1

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


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## 9.6 Viewing the Download Cart

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

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TSDS Unique ID

**Extract & Download Batch**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL

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

From: 03/11/2013 To: 04/25/2013

District: TEXAS PREPARATORY SCHOOL [ 105802 ] School:

[State ID Home](#)  
[Filter Results](#)

Upload Date	Batch Info	District	School	Status	Record Count	Next Action
04/15/2013	164	105802	AAA	IDs Assigned.	8	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/12/2013	160	105802	AAA	ID Assigned.	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/12/2013	159	105802	AAA	ID Assigned.	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/12/2013	158	105802	AAA	IDs Assigned.	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/12/2013	157	105802	AAA	IDs Assigned.	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/11/2013	155	105802	AAA	IDs Assigned.	8	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/11/2013	154	105802	AAA	ID Assigned.	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>
04/11/2013	153	105802	AAA	ID Assigned.	1	<a href="#">Extract Records</a> <a href="#">Add To Download Cart</a>

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View Download Cart

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The **Download Cart** page is displayed:

TSDS | Help Desk | Exit



TSDS Unique ID

**Download Cart**

Current Login: Michele.Elledge Location: 105802-TEXAS PREPARATORY SCHOOL

[State ID Home](#)

Download Cart - IDs Assigned Extract Type			
	Upload Date	Batch Number	Record Count
<input type="checkbox"/>	04/29/2013	216	1

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

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## 10 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.

### 10.1 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 **Download By Location** from the **Menu**.

The screenshot shows the TSDS Unique ID application interface. At the top, there is a blue header bar with 'TSDS | Help Desk | Exit'. Below this is the 'tsds texas student data system' logo and the text 'TSDS Unique ID'. The main content area is titled 'State ID Home' and includes a 'MENU' on the left with options: 'Upload Batch File', 'Enter Individual Person', 'Batch Search', 'Extract & Download Batch', 'Download By Location' (highlighted with a red circle), and 'Exit Application'. The main area contains search filters: 'Submission Type: All', 'Processing Stage: All', 'Sort: Upload Date Desc', and 'Filter Results'. There are date pickers for 'From: 03/15/2013' and 'To: 04/29/2013'. A 'District' dropdown is set to 'AUSTIN ISD [ 227901 ]', and a 'School' field is empty. A 'Find Batch:' search bar is also present. Below the filters is a table with the following data:

Upload Date	Batch Info	District	School	Status	Record Count	Next Action
04/26/2013	211	227901	AAA	Near Matches / Duplicates Found	1	Resolve Near Matches
04/26/2013	210	227901	AAA	IDs Assigned	9	Download State ID

2. The system displays a list of districts and locations / schools to which you have access has access to on the **Download By Location** details page.



**Download By Location**

Current Login: Michele.Elledge Location: 227901-AUSTIN ISD [State ID Home](#)

[Search](#)

District	School	Agency Name	
227901	227901000	AUSTIN ISD-AUSTIN ISD	<a href="#">Download</a>
227901	227901002	AUSTIN ISD-AUSTIN H S	<a href="#">Download</a>
227901	227901003	AUSTIN ISD-JOHNSTON H S	<a href="#">Download</a>
227901	227901004	AUSTIN ISD-LANIER H S	<a href="#">Download</a>
227901	227901005	AUSTIN ISD-MCCALLUM H S	<a href="#">Download</a>
227901	227901006	AUSTIN ISD-REAGAN H S	<a href="#">Download</a>
227901	227901007	AUSTIN ISD-TRAVIS H S	<a href="#">Download</a>
227901	227901008	AUSTIN ISD-CROCKETT H S	<a href="#">Download</a>
227901	227901009	AUSTIN ISD-ANDERSON H S	<a href="#">Download</a>
227901	227901010	AUSTIN ISD-JOHNSON H S	<a href="#">Download</a>

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3. The search feature allows you to search by the district code, school code or agency name (i.e. school name).
4. Enter the text to search for in the Search form.
  - a. When a *number* is typed into the search form, the system searches for all of the districts and schools with that code.
  - b. When *partial numbers* are typed into the search form, the system searches for all of the districts and schools with that partial number.
  - c. When *text* is used, the system searches for all of the agency names matching the search phrase.
5. Click **Search**.
6. The system displays the results on the **Download By Location** details page.
- 7.

Proceed to the **Downloading Persons By Location** section below.

## 10.2 Downloading Persons by Location


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

- Follow steps 1 through 7 above.
- Click **Download** for the location to be extracted. The system displays a **Download Options** page.

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

- 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 Uniq-ID® v1.0, eScholar Uniq-ID® v2.0, or eScholar Uniq-ID® v2.1 (only eScholar Uniq-ID® v2.1 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.
- Select the appropriate download options.
- Click **Download**.
- The **Download By Location** download page is displayed. Click the **here** link in the Status column.

TSDS | Help Desk | Exit

 **TSDS Unique ID**

**Download By Location**

Current Login: Michele.Elledge Location: 227901-AUSTIN ISD [State ID Home](#)

Upload Date	Batch Info	Status	Record Count	Next Action
		File Extract Complete. Click <a href="#">here</a> to download the file.	2	<a href="#">Extract Another Location</a>

TSDS | Help Desk | Exit

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

## 11 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.

## 12 Change Districts

If you have access to more than one LEA, you can change the LEA currently displayed by clicking the **Change District** from the **Admin Menu**. This menu item is only visible if you are authorized to change LEAs. This is typically available to ESC users who have the Unique ID LEA role for more than one LEA.

### 12.1 Changing a District Selection

The application maintains a current district reference that controls what data can be uploaded into the system. For uploads, the application requires you to work with only one LEA at a time. If you who have access to two or more LEAs, the **Change District** module allows the user to switch between districts for file uploads/person entry. To change LEAs:

1. Click **Change District** from the **Admin Menu**.

State ID Home

Current Login: Multi-District Location: 227901 - AUSTIN ISD

**MENU**

- Upload Batch File
- Enter Individual Person
- Person Search
- Extract & Download Batch
- Exit Application

**ADMIN MENU**

- Change District
- Review All Batches

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

From: 03/12/2013 To: 04/26/2013

District: AUSTIN ISD [227901] School:

Find Batch: Search

Upload Date	Batch Info	District	School	Status	Record Count	Next Action
04/26/2013	210	227901	AAA	IDs Assigned	9	Download State ID

TSDS | Help Desk | Exit

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2. Select a district from the **District** dropdown list to change the current district.

Change District

Current Login: Multi-District Location: 227901-AUSTIN ISD State ID Home

Search: Submit Clear

District: AUSTIN ISD [227901-AAA] Select this District

AUSTIN ISD [227901-AAA]

TEXAS PREPARATORY SCHOOL [105802-AAA]

TSDS | Help Desk | Exit

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3. Click **Select This District**.

## 12.2 Searching for a District

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

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

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

2. Click **Filter Results**.
3. The system displays a page listing all of the batches that match the search criteria.

## 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:

State ID Home

Current Login: Michele.Elledge Location: 105802 - TEXAS PREPARATORY SCHOOL

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

From: 03/12/2013 To: 04/26/2013

District: TEXAS PREPARATORY SCHOOL [ 105802 ] School:

Find Batch: Search

Upload Date	Batch Info	District	School	Status	Record Count	Next Action
04/26/2013	207	105802	AAA	IDs Assigned	9	Download State ID

TSDS | Help Desk | Exit

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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 displays where each record in a submission is within the ID Assignment Process or a Batch Search:

The screenshot shows a web interface for 'Batch Information : Batch 207'. It features four tabs: 'Batch Statistics' (selected), 'Processing Info', 'Download Info', and 'General Info'. Below the tabs, a table displays 'ID Assignment Complete' statistics. The table has two columns: 'Person Found and History Created During Assign ID Stage' and a numerical value '9'. At the bottom of the window is a 'Close Window' button.

ID Assignment Complete	
Person Found and History Created During Assign ID Stage	9

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:

The screenshot shows the 'Processing Info' tab for 'Batch Information : Batch 207'. It features the same four tabs as the previous screenshot, with 'Processing Info' now selected. Below the tabs, a table displays a timeline of processing steps. The table has two columns: a timestamp and a description of the step. At the bottom of the window is a 'Close Window' button.

04/26/2013 11:39:49 AM	Validation Started
04/26/2013 11:39:49 AM	Upload Completed
04/26/2013 11:39:49 AM	Validation Completed
04/26/2013 05:05:50 PM	Assignment Started
04/26/2013 05:05:50 PM	Assignment Completed

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



## Download Info 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:

Batch Information : Batch 207	
<u>Batch Statistics</u>	<u>Processing Info</u>
<u>Download Info</u>	<u>General Info</u>
04/26/2013 05:11:57 PM	Michele.Elledge
04/26/2013 05:12:07 PM	Michele.Elledge
Close Window	

## General Info Tab

The General Info tab displays basic information about a submission:

Batch Information : Batch 207

Batch Statistics

Processing Info

Download Info

General Info

Batch Number	207
Submission Type	File
Batch Status	ID CREATION COMPLETE
District	105802
School	AAA
Extract Date	12/25/2012
Extract File	105802_041_STUDENT_201212250800_training_scenarios_Train09.txt
Transmission ID	0000000009
Creation User ID	Multi.District
Creation Date	04/26/2013
Total Records	9
Record Delimiter	.
Header Delimiter	0x09
File Version	2.1
Source System	Default

Close Window

## Appendix B – Batch Record Statuses

Below is a list of all possible statuses that an individual record can have. A record status indicates exactly where in the ID Assignment or Batch Search process a particular record is. Included in the list are the **Status Title**, a **Description**, and what the **Grouping** for the particular record is. The actual **Status Titles** can be found in the application whenever a 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 Uniq-ID <sup>®</sup> for Students system back into the local source systems. In addition, this field is used in a limited capacity to match student records within the eScholar Uniq-ID <sup>®</sup> for Students system. This field can be set to optional for Online Entry only.
Social Security Number	No	VarChar (11)		It is not required for matching, but will be used if it is supplied. <i>Matching Field</i>
Race / Ethnicity	No	VarChar (4)		If a value is submitted, it is validated. State-defined Race / Ethnic code. Can be optional if Make Ethnic Code Option System Property is enabled.
State ID	No	VarChar (25)		Batch Search will fail if the State ID is submitted.
Current District Code	No	VarChar (20)		If a value is submitted, it is validated. District Code where the student is currently enrolled. State-defined valid
Current School Year	No	VarChar (10)		Must have a 'yyyy' format.
Alternate Last Name	No	VarChar (60)	V2 only	This field should be used for the birth surname, alternate last name, or former last name of the student. Blank submissions are ignored if an Alternate Last Name was previously submitted. To clear an Alternate Last Name, the word NULL in all capital letters must be supplied during submission for this field. <i>Matching Field</i>
Alternate ID	No	VarChar (50)	V2 only	This is an ID used in the system defined in the Alternate Source field. If Alternate Source is

				provided, this field is required.
Alternate Source	No	VarChar (60)	V2 only	This is the source name for the Alternate ID field. This can be used to track additional local identifiers or other state identifiers. If Alternate ID is required, this field is required.
Customer Defined Field 1	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 2	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 3	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 4	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 5	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 6	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 7	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be supplied during submission for this field. This field should not be used for Social Security Numbers.
Customer Defined Field 8	No	VarChar (25)	V2 only	This field can be defined by a system administrator for system-wide use. To clear this Customer Defined Field, the word NULL in all capital letters must be



				supplied during submission for this field. This field should not be used for Social Security Numbers.
Record Status	No		V2 only	This field is the internal transaction status result for the record and is provided in the output file. This field should be blank on input. Any values on input will be ignored.
Record Reference Number	No		V2 only	This field is the internal transaction identifier for the record as part of the output file. This field should be blank on input. Any values on input will be ignored.
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.

## 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 (e.g., 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.

## Version History

Version	Date	Name	Description
0.1	4/30/2013	Michele Elledge	Initial draft (eScholar Unique ID User Guide customized for TEA).
.02	5/10/2013	Michele Elledge	Incorporated changes based on feedback received from review of initial draft.
1.0	5/21/2013	Michele Elledge	