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About This Guide

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

Definitions, Acronyms, and Abbreviations

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

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

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

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

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

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

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

**SIS:** Student Information System.

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

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

Purpose

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

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

The application allows you to:

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

The system also offers:

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

System Requirements

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

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

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

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

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

**TSDS Unique ID System Roles**

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

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

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

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

**TSDS Unique ID Assignment Process**

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

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

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

Home Page

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

Upload Batch File

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

Enter Individual Person

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

Person Search

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

Batch Search

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

Extract & Download Batch

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

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

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

Exit Application

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

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

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

Accessing Feature Menu Items

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

Viewing Previously Submitted Batches

The table at the bottom of the Home page displays a list of submissions to the TSDS Unique ID system that have been uploaded via a batch file or entered online. This list displays the upload date, submission type, batch ID (a link to batch information), current status, number of records in the batch, and buttons for the next action. This list only displays batches you have access to for your current location. The button in the Next Action column allows you to continue where you left off in the ID assignment process.
Note: The Status column always displays the current status of the batch and guides you to the next action. The Next Action column has a button that enables you to initiate the next action. The TSDS Unique ID system contains many pages that display lists of items. If the list cannot be displayed on one page, you can navigate to other pages in the list by clicking the First, Prev, Next, and Last bottom of each list.

Filtering Batches

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

The Home page includes the following filters:

- **District**: The applicable district. The application displays all of the LEAs that a user has access to so that the page can be filtered by a specific LEA.
- **School**: The name of the school. The application can find batches for a specific school if you enter it by name or number.
- **Batch Number**: The application can find batches by number.
• **Submission Type:** The type of data submission. The options are All, File, Online, SLF, Edit, WebService, and Automation. (Only All, File and Online are applicable for TSDS Unique ID).

• **Processing Stage:** The stage of processing the submission is in. The options are All, Validate Data, Fix Errors, Assign Home, Resolve Near Matches, Download Unique ID, Canceled, Validation in Progress, Assignment in Progress, Continue Validation, and Continue Assignment. (Fix Errors is not applicable to TSDS Unique ID.)

• **Submission Date:** The dates for the submission. Date ranges must be valid.

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

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

1. Access the Home page by either logging in or clicking Back to Home on the menu.

2. Click the dropdown arrow or use the date picker and select the appropriate option for each of the filters.

3. Click Filter Results.

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

**Finding a Batch**

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

In the following example, suppose you want to locate batch 1300:
If the application finds a matching batch, the system displays the page listing only that batch, as illustrated below:

![Filter page](image1)

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

![No Batches Found](image2)

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

If you have access to more than one LEA, the application has an additional feature. If the batch number submitted is for an LEA other than the current LEA and you have access to that other LEA, the application displays a message indicating you should change your current district setting.
You can switch to the other district automatically by clicking on the here link. Upon doing so, the system changes the district and also displays the batch.

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

**Viewing the Batch Information**

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

Batches uploaded by LEA and campus users show information that is similar to the following example:
In the example above, the key fields show the following information:

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

However, batch files are occasionally created during an administrative operation such as to separate shared IDs. These records look like the following:
This example shows a file that was automatically created by a Separate Shared ID admin operation. This operation takes place when two students are assigned the same ID. The system automatically generates a file to create a new ID for one of the students. The resulting file shows significantly different information in the following fields:

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

Once the Unique IDs are assigned, you can view and download the file by clicking **Download Unique ID** in the **Next Action** column:
The system extracts the file and provides a **Download** button. Click the button to download the file:

![Download button example]

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

![Example of file with Unique-ID]

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TSDS Unique ID User Guide
Version 11.0.1
Feb. 19, 2020

Texas Education Agency
Assign IDs via Batch File

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

Uploading a Batch File

To upload a batch file, follow these steps:

1. Click on the Upload File link in the Menu.

2. If the Basic tab isn’t already selected, select it.

3. Click Browse to find the file on your local computer system. The file must be located on the local computer system in order to upload the file.

4. Select the file from the local system and click Open.

5. Click Upload. This uploads the file listed in the File to Upload field to the TSDS Unique ID system for processing.

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

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

To view the errors, click View All.

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

File Upload Success

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

Data Validation

As illustrated in the screenshot above, once a file has passed file validation, the system automatically advances it to the next step, data validation. This process loads the records in the
file into the staging database tables, where further validation checks are performed on the data. This includes validation of data elements such as dates and gender and race codes.

**More Than Thirty Data Validation Errors:**

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

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

**Less Than Thirty Data Validation Errors:**

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

**Note:** When there are less than thirty data validation errors, you are not alerted on the page that records have been canceled, but can check the disposition of any batch by clicking **Batch Info** (see
NOTE: If the system is interrupted (for example, connectivity to the database is lost) during data validation, the batch returns a message stating the same. Click Continue Validation in the Next Action column to restart the process. This may be the case even if all the records, according to their status, appear to have finished validation. In this instance, you should still click Continue Validation.

Assigning IDs

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

To assign Unique IDs, perform the following steps:

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

2. To review the updated status of the assignment process, click the batch number under Batch Info to review batch information. See Batch Information section below for more details about this.

3. Review the Next Action column for the appropriate next step.

When you click Assign Unique ID the matching logic is initiated. This compares the data on the submitted record with existing master records and assigns a match score to each
record. For each person record submitted, the matching logic can produce one of three results: match, near match, or no match. The result is dependent on the match score for the record. If the match score is 98% to 100%, then the result is match. If the match score for the record is 89% to 97%, then the result is near match. If the match score is below 89%, then the result is no match. The following is an illustration:

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

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

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

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

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

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

Resolving Near Matches

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

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

**Special Note about Near Matches:**

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

**Selecting Assign Selected**

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

**Selecting Create New**

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

<table>
<thead>
<tr>
<th>Results of a Unique-ID Add Person for an enrolling student</th>
<th>Associated action to take for an enrolling student in Unique ID:</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSN/S# Match</td>
<td>Last Name Match</td>
<td>First Name Match</td>
</tr>
<tr>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>N</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>N</td>
<td>Y</td>
<td>Y</td>
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<td>Y</td>
</tr>
<tr>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
</tbody>
</table>

The previous district should be notified of the demographic change whenever the Master record is updated.
The following buttons/functions are available when resolving a pending near match:

- **Cancel All Checked Records**: On the initial near match page for the batch, the near match records include a check box. When Cancel All Check Records is clicked, all near match records that have a checked check box are canceled. Any unselected near matches remain in the pending near match queue.

- **Cancel All Near Match Records For This Batch**: On the initial near match page for the batch, all of the pending near matches can be canceled. When the Cancel All Near Match Records For This Batch is clicked, all pending near matches for the entire batch is canceled and are removed for the batch.

- **Assign ID**: This decision is the same as a match decision described above. When the Assign ID is clicked, the submission record retrieves the identifier of the selected person. When this is clicked, all other near matches for the submission record are removed.

- **Create New ID**: This decision is the same as the no match decision described above. When Create New ID is clicked, the submission record generates a new identifier for the person. When this is clicked, all other near matches for the submission record are removed.

- **Cancel Record**: When this is clicked, the pending near match is canceled. All pending near matches for this submission record are canceled. This only cancels the specific near match you are reviewing and does not affect other pending near matches in the batch.

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

**Processing Near Matches**

To resolve near matches, perform the following steps:

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

2. Review the **Resolve Near Matches/Duplicates** page for information about the records. This page lists all of the near matches for the batch. In the example below, the submitted batch has eight records that resulted in a near match:
3. Click Review and Select or the hyperlinked name to view the Resolve Near Matches/Duplicates details page.

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

The purpose of the above page is simply to provide information to help you determine if the submitted person record is the same person as one of the near match records.
found, or if the submitted person record is a brand new person record submitted to the TSDS Unique ID System. The Person Record to Review and Select is the submitted record. Clicking the link in the **Last Name** or **First Name** column displays the Compare Person Information page. The link in the **School** column provides details about the school, including school name and contact information.

5. 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.)

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

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

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

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

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

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

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

**Create New ID**

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

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

**Cancel Record**

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

**Return to List of Near Matches**

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

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

The following scenarios always produce a result of near match:

**Multiple Matches**

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

![Comparison of records](image)

**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:
In the previous example, since the only data element that is different is the SSN, then the persons are most likely the same. If you determine that these are the same people then:
<table>
<thead>
<tr>
<th>IF:</th>
<th>THEN:</th>
</tr>
</thead>
</table>
| The SSN on the existing Master Record is correct. | 1. Select No for Update Master.  
2. Select Assign Selected.  
3. Download the record to update the information in the SIS. |
| The SSN on the existing Master Record is incorrect. | 1. Select Yes for Update Master.  
2. Select Assign Selected. |
In the example above, since, in addition to the SSN, the Local ID is different, the person records may actually belong to different people. You must do some further checking to determine the appropriate action to take.

**SSNs Same**

If no match is found but the SSNs are the same between a submitted record and a master record, the result is near match, as illustrated below:
In this scenario, as illustrated above, these are most likely two different persons and you should use the following table to determine what action to take:

<table>
<thead>
<tr>
<th>IF:</th>
<th>THEN:</th>
</tr>
</thead>
<tbody>
<tr>
<td>The SSN is not correct for your person in your district source system, for the submitted record (Person Record being reviewed).</td>
<td>1. Click <strong>Cancel Submission</strong>.</td>
</tr>
<tr>
<td>2. Correct the SSN in the source system.</td>
<td></td>
</tr>
<tr>
<td>3. Resubmit/re-enter the record.</td>
<td></td>
</tr>
<tr>
<td>The person record submitted has the correct SSN.</td>
<td>1. Click <strong>Cancel Submission</strong>.</td>
</tr>
<tr>
<td>2. Contact the LEA who owns the Master Record with the incorrect SSN and ask them to correct it.</td>
<td></td>
</tr>
<tr>
<td>3. After the conflict is resolved by the other LEA, then resubmit the record. *</td>
<td><strong>Resolve the conflict by emailing the district holding the record with the incorrect SSN. Use the PET hyperlink inside the EDIT Plus application.</strong></td>
</tr>
</tbody>
</table>

If the Master Person Record is updated after the near match is created, the application displays a message in the **Comments** row.
Field Descriptions on the Compare Person Information page:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source System</td>
<td>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.</td>
</tr>
<tr>
<td>Serial #</td>
<td>The serial number is the reference ID for this record. Administrators can use this ID to review additional details.</td>
</tr>
<tr>
<td>Created</td>
<td>The date the record was created in the application.</td>
</tr>
<tr>
<td>Last Update</td>
<td>The date the record was last updated by a submission record in the application.</td>
</tr>
<tr>
<td>Comments</td>
<td>If the master record has been updated since the near match was created or if there are other record comments, the application will display the comments in this section. For the submission record, the Home of the matched record will be displayed.</td>
</tr>
<tr>
<td>Match Notes</td>
<td>If a near match was forced due to a rule configured by the System Administrator, the Match Notes section will display the reason. This may include the SSN Rule. This information may help you identify why a record is a near match if it is not clear based upon the data.</td>
</tr>
<tr>
<td>Update Master</td>
<td>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.</td>
</tr>
</tbody>
</table>

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

![School Information](image)

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

![Near Match Summary](image)

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

**Canceling Near Matches**

In addition to canceling a record from the **Resolve Near Matches/Duplicates** detail page shown above, records can also be canceled from the **Resolve Near Matches/Duplicates** home page shown below. When you cancel the near match record, it is removed from Unique ID processing and you must resubmit the record in order to process the record.
• To cancel specific records, check the boxes to the left of the records that are to be canceled and then click **Cancel All Checked Records**.

• To cancel all records on the page, check the **Select All on Page** checkbox and then click **Cancel All Checked Records**.

• To cancel all records in the batch, click **Cancel All Near Match Records For This Batch**. The list of Near Match records may span two or more pages. Clicking **Cancel All Near Match Records for This Batch** cancels all near matches in the batch list, not just the batches displayed on an individual page.

**Filtering Near Matches**

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

Example of the list before the filter:

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

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

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

1. Click **Download Unique ID** on the application home page for the appropriate batch.

2. Download the file by clicking the **Download** button in the Next Action column. Doing so opens a file download dialogue box that allows the file to be saved to your local computer or opened.

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

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

This feature allows you to:

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

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

### Entering Individual Persons

To enter persons, perform the following steps:

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

![](unique_id_menu.png)

2. Complete the **Person Data Entry** form:
As illustrated above, the form includes the following sections:

- **General Information** – includes basic information such as name, date of birth, gender, ethnicity, and other demographic fields

- **Enrollment Information** – includes the grade, school, district, local ID, alternate ID and other enrollment fields.

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

- SSN is required and must be valid.

- If the person is a staff member, Grade must be 00

- School must be the nine-digit code associated with the school. (the six-digit LEA code and the three-digit school code) e.g. 227901002.

- If the person is a staff member and not assigned to a campus, then enter the six-digit district number and a campus code of 000. (e.g. 227901000)

- District must be the six-digit number. e.g. 227901

3. Once the form has been completed, including all required fields, return to the Home page

4. Click **Assign Unique ID**.
Validating and Fixing Data

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

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

Assigning IDS

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

Resolving Near Matches

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

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

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

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

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

This feature allows you to:

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

Searching for a Person

To search for persons perform the following:

1. Click on the Person Search link on the Menu.

2. Select the appropriate search tab. This module has four types of searches available: Simple Search, Advanced Search, Home Search, and Alternate ID Search.

   - Simple Search allows you to search for a person using basic demographic information.

**NOTE:** First Name and Last Name are required for both the Simple Search and Advanced Search. Wild card characters (e.g., *, %, _, ?) are not supported.
• **Advanced Search** allows you to search for a person using all available fields.

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.

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

4. Click **Search**.

• **ID Search** allows you to search for persons by Home.
Viewing the Search Results

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

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:

Providing additional search criteria may result in different search results and also impacts the match score that is displayed in the Match Probability column. The following examples illustrate how searching with or without a date of birth impacts the match probability.
Search without a date of birth: In the example below three results are returned and the Match Probability is 71-75.

Search with date of birth: In the example below, by adding date of birth to the search criteria, an additional search result is returned and the Match Probability for the correct match is 94; this is a Match.
When a valid search is performed but there are no matches or only one near match below the upper near match threshold, the system displays the **Enter New Person** button (the display of the button is dependent upon your security profile).

To view more detailed information about the person when search results are returned, click the link in the **Last Name** or **First Name** column. Doing so opens the Search Individual Person information page.
The Individual Person Information page displays the person’s current information. The name of the person and related information are displayed in the Person Panel at the top of the page.

The Individual Person Information page is referred to as the Master Record. The Person Panel also includes links to the History section and the Associated Retired IDs section.
The **History** section displays additional historical information about the person from any previous records that exist in the database.

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

- You can view additional information, edit the person, return to the search results, or return to the home page.
See Appendix B for the possible statuses that a batch record may have.
Editing a Person Record

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

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

AND

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

To edit a person, perform the following steps:

1. Perform a search as described above.

2. Click Edit Person on the Search Individual Person results page.

Note: Edit Person may not be enabled.
3. Review the **Edit Person** page. This page displays the person record and allows you to make corrections/additions to the information.

4. Update information as necessary. **School** and **District** are not editable, but all other fields can be updated.

5. To save the changes, click **Update Person Record**.

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

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

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

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

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

- Search Individual Person Detail Results
- Near Match Review

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

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

1. Click the Person Search link on the Menu.

2. Search for a person as described above.

3. Click the hyperlinked Last Name or First Name to view the search details. The Person Search information page appears.

4. Click Add Note.

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

7. A confirmation page is displayed allowing you to view the note that was added.

8. Click **Back** to return to the Individual Person Information page.

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

**Viewing Person Notes**

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

1. Search for a person as described above.

2. Click the hyperlinked **Last Name** or **First Name** to view the search details. Upon clicking the hyperlinks, the **Person Search** information page is displayed.

3. If notes have been added, **View Note** appears beneath the Person Information and ID in the top row of the details. Click **View Note**.

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

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

This feature allows you to:

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

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

Searching for Persons within a Batch File

The Batch Search feature requires that a TSDS Unique ID person file is uploaded into the system. The format and structure of the search file are exactly the same as the person batch file format, but only first name and last name are required. However, if more information is provided, there is a better chance of the system finding a matching person. In addition, if a value for an optional field is provided, the application validates the format of that value. If the system determines that the format is not correct it auto-cancels the record. Batch search includes basic search and an advanced search capability, along with the ability to download the results. An example of when you may choose to use batch search instead of person search is:

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

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

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

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

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

   The **Filters** capability removes matches from the results where the selected field does not match the potential match. This capability allows you to select one or many filters to apply to the batch search, and if the submission record does not match the values for those fields to the master record, the record is not returned as a match. The application applies filters with an “or” condition, so if multiple filters are selected and only one of the values is different between the master and the submission record, it is a no match. For example, if the **District** and **School** filters are applied to a batch search, which includes Jonathan Student in district 105802 and school 041, and the system finds a
Jonathan Student record in district 227901 and school 016 as a match, the 227901 record is filtered out of the results and is not returned as a match.

2. Click **Upload**.

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

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

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

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

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

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

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

The system returns to the **Batch Search** page displaying the status of the process:
4. Click **Search** to perform the search. If **Search** is not visible, click **Filter Results** to refresh the page.

5. The system returns to the **Batch Search** page, displaying the status of the process, along with the **Batch Information** button. The result for each record in the process is one of the following:

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

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

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

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

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

6. Click **Download** to download the file. If the **Download** button is not visible, click **Filter Results** to refresh the page.
7. Download the search results file by clicking Download in the Next Action column. Doing so opens a File Download dialogue box that enables you to either open the file or save it to your local computer.

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

**Viewing Previous Batch Searches**

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

**Extracting & Downloading Batch Search Files**

The Extract & Download functionality available within the Batch Search component is specifically designed to extract and download the results of Batch Search files.
To perform an extract and download within the **Batch Search** component, click **Extract & Download** on the **Batch Search** page.

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

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

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

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

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

This module allows you to:

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

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

Filtering the List of Downloads

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

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

**Note:** Errors to Fix and Fixed Records also appear in the Extract Type dropdown, but these are not applicable to TSDS Unique ID.
To filter results displayed on the Extract & Download Batch page, perform the following:

1. Click Batch link under Download on the menu.

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

3. Click Filter Results.

4. Once the filters are applied, proceed to the Downloading a File instructions below.

5. You can also get details about the submission the download is for by clicking the button in the Batch Info column. For more information about this refer to Appendix A.
Downloading a Single File

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

1. Perform steps 1 through 5 from the “Filtering the List of Downloads” section.

2. Click Extract Records for the appropriate batch.

3. Download the file by clicking the Download. Doing so opens a file download dialogue box that enables you to either open the file or save it to your local computer.

4. To extract another batch, click Extract Another Batch.

Downloading Multiple Files

To download multiple files, perform the following steps:

1. Filtering the List of Downloads section.

2. Click Add to Download Cart for the appropriate batch.

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.

4. To continue adding batches to the cart, click Back to Extract & Download.
5. Repeat steps 1 through 4 as necessary until all files are added to the cart.

6. Click **Download Cart** to generate the download file.

7. Download the file by clicking **Download Cart**. Doing so opens a File Download dialogue box that enables you to either open the file or save it to your local computer.

### Download 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:

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

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

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

3. **Click Download**.

**Removing Batches from the Download Cart**

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

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

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

The Download Cart page appears:
Download by Location

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

With this feature, you can:

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

Searching for a Location

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

1. Click Location under Download from the menu.

The system displays a list of districts and locations or schools for which you have access.
The search feature allows you to search by the district code, school code, or agency name (for example, school name).

2. Enter the text to search for in the Search form.
   
   • When you enter a number into the search form, the system searches for all of the districts and schools with that code.
   
   • When you enter partial numbers into the search form, the system searches for all of the districts and schools with that partial number.
   
   • When you enter text, the system searches for all of the agency names matching the search phrase.

3. Click Search.

4. The system displays the results.

5. Proceed to the Downloading Persons by Location section below.

**Downloading Persons by Location**

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

1. Follow steps 1 through 5 above.

2. Click Download for the location to be extracted. The system displays a Download Options page.

3. The Download Options page displays the available options in a form, allowing you to select specific download options. The step for Downloading with Options for Download by Location is the exact same as the Extract & Download - Download with Options section above. You can select from the following options:
• **Template:** eScholar Unique ID® v1.0, eScholar Unique ID® v2.0, or eScholar Unique ID® v2.1 (only eScholar Unique ID® v3.0 is applicable for the TSDS Unique ID system)

• **Field Delimiter:** The options for this selection are Tab or Comma.

• **Field Qualifier:** The options for this selection are ‘‘ and ‘‘.

• **Date Format:** The options for this selection are:
  - mm/dd/yyyy
  - mm/d/yyyy
  - ISO YYYY-MM-DD
  - m/d/yyyy
  - m/dd/yyyy

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

4. Select the appropriate download options.

5. Click **Download**.

6. The **Download by Location** download page appears. Click **Download**.

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

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

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

### Upload Enrollment Events

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

**File Layout:** eScholar UID File Format 3.0  
**Submission Purpose:** 002 – Enrollment Events

When the file is uploaded a batch # is provided to the user and the file is visible through the Enrollment Event Dashboard while it processes.
Note: Concurrent files from the same LEA will not be processed at the same time. A file will be sent back to the queue if a different file is running for the same LEA and will be processed at a later time.

Validate Events

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

File Validation

A batch file is updated to rejected status if:

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

Data Validation

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

A record is also canceled if:

- Unique ID is invalid, retired, or not present
- School Year is invalid
- Field requirements are not met
- Lookup codes are invalid or inactive
- Data Type is invalid
- First, Middle, Last Name contains anything other than the following values: A-Z, a-z, Á-Ú, á-ú, 0-9, ', -, [space]

Canceled records are added to the Canceled group of records that are available for user download once the file completes processing. All canceled records include a canceled status and the reason they were canceled within the file.
Enrollment Sequence Validation
The Enrollment Sequence Validation ensures that an Entry event exists before a Withdrawal event is added for the same Unique ID, LEA/Campus, and School Year. The process builds a complete enrollment sequence per student within the file and validates against the existing enrollment events in the system table. If the proper enrollment sequence does not exist, then all the enrollment records in the file for the affected Unique ID are canceled. When there is a proper sequence of enrollment events, the record moves to the next validation stage. Additionally, duplicate events are identified in this stage and tagged as such.

Master/History Update Validation

Master Record Ownership Switch
The Master Record is updated to reflect the latest enrollment entry event information which can include changes to LEA, Campus, Grade Level, Local ID and school year. The Entry/Exit Date must fall on the current school year. As an example, a school year runs from 8/1/2019 – 07/31/2020.

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

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

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

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

1. An event is assigned a Processed status when an event is:
   a. added
   b. updated
   c. added – master record updated
   d. added – history record inserted

2. The main reasons an event is assigned a Canceled status are when there is:
   a. an incorrect enrollment sequence
   b. a duplicate event
   c. an invalid Unique ID
   d. an invalid school year
   e. an invalid lookup code
Deleting Entry Events – Master Record Ownership Rollback
When the rollback option is available, deleting an Entry event rolls the Master Record ownership back to the ownership listed on the previously saved most recent master record. The process validates the deletion against established criteria before deleting the event and rolling back the master record.

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

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

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

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

Steps

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

1. Follow steps 1-4 above.
2. Click the Add Enrollment button. The Add Enrollment page will display.
3. Complete the required information and click on the Add Enrollment button.
4. If validation errors exist, the page will display all errors at the top and highlight the same within the page.
5. If there are no validation errors, the Add Enrollment Information page will refresh and display the following message:

**Editing Person Enrollment Events**

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

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

**Steps**

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

1. Follow steps 1-4 above.
2. Click the **Edit Enrollment** button. The Edit Enrollment page will display.
3. Update the information and click on the **Edit Enrollment** button.
4. If validation errors exist, the page will display all errors at the top and highlight the same within the page.
If there are no validation errors, the Edit Enrollment Information page will refresh and display the following message:

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

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

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

**Steps (send email)**

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

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

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

Exit Application

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

Change Districts

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

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

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

Batch Statistics Tab

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

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

Processing Info Tab

The Processing Info tab displays a timeline of each step in the ID Assignment Process or a Batch Search:
Each step except for the Upload step contains a start date/time and an end date/time.

**Downloads Tab**

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

The General tab displays basic information about a submission:
Appendix B – Batch Record Statuses

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

<table>
<thead>
<tr>
<th>Status Message (used in output file)</th>
</tr>
</thead>
<tbody>
<tr>
<td>New ID Assigned - No Matching Record Found</td>
</tr>
<tr>
<td>Ready to Resolve Near Matches/Duplicates</td>
</tr>
<tr>
<td>New ID Assigned During Match Resolution Stage</td>
</tr>
<tr>
<td>Person Found and History Created During Match Resolution Stage</td>
</tr>
<tr>
<td>Canceled During Match Resolution Stage</td>
</tr>
<tr>
<td>Person Found and History Created - Exact Match</td>
</tr>
<tr>
<td>Person Found but No Change in Data - Exact Match</td>
</tr>
<tr>
<td>CANCELED DURING DATA VALIDATION STAGE - ID CONTAINED IN RECORD NOT FOUND IN SYSTEM</td>
</tr>
<tr>
<td>CANCELED DURING DATA VALIDATION STAGE</td>
</tr>
<tr>
<td>CANCELED DURING ASSIGN ID STAGE</td>
</tr>
<tr>
<td>PERSON FOUND DURING ASSIGN ID STAGE BUT HISTORY NOT CREATED</td>
</tr>
<tr>
<td>PERSON FOUND DURING MATCH RESOLUTION STAGE BUT HISTORY NOT CREATED</td>
</tr>
<tr>
<td>PERSON FOUND AND HISTORY CREATED DURING ASSIGN ID STAGE</td>
</tr>
<tr>
<td>EXISTING ID ASSIGNED DURING MATCH RESOLUTION STAGE - NO EXACT MATCH</td>
</tr>
<tr>
<td>NEW ID CREATED DURING MATCH RESOLUTION STAGE - NO EXACT MATCH</td>
</tr>
</tbody>
</table>
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:

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Required</th>
<th>System - Data type</th>
<th>File Format Version</th>
<th>Notes/Format Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record Type</td>
<td>Yes</td>
<td>VarChar (2)</td>
<td></td>
<td>Always ‘ID’.</td>
</tr>
<tr>
<td>Current School Code</td>
<td>No</td>
<td>VarChar (20)</td>
<td></td>
<td>School Code where the person is currently enrolled. If a value is submitted, it is validated.</td>
</tr>
<tr>
<td>Resident District Code</td>
<td>No</td>
<td>VarChar (20)</td>
<td></td>
<td>District where the person is currently a resident. A System Property can make this field optional. If a value is submitted, it is validated.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Yes</td>
<td>VarChar (60)</td>
<td></td>
<td>Legal last name of the person. <strong>Matching Field</strong></td>
</tr>
<tr>
<td>First Name</td>
<td>Yes</td>
<td>VarChar (60)</td>
<td></td>
<td>Legal first name of the person. <strong>Matching Field</strong></td>
</tr>
<tr>
<td>Middle Name</td>
<td>No</td>
<td>VarChar (60)</td>
<td></td>
<td>Legal middle name of the person. <strong>Matching Field</strong></td>
</tr>
<tr>
<td>Name Suffix</td>
<td>No</td>
<td>VarChar (10)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td>No</td>
<td>VarChar (6)</td>
<td></td>
<td>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. <strong>Matching Field</strong></td>
</tr>
</tbody>
</table>
| 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:  
  - mm/dd/yyyy  
  - m/d/yyyy  
  - mm/d/yyyy  
  - m/dd/yyyy |
### Matching Field

- yyyy-dd-mm

<table>
<thead>
<tr>
<th>Field</th>
<th>Required</th>
<th>Type</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Grade Level</td>
<td>No</td>
<td>VarChar(2)</td>
<td>If a value is submitted, it is validated. State-defined Grade Level Code. Note – Grade will be validated against Ethnicity Indicators.</td>
</tr>
<tr>
<td>Local Student ID</td>
<td>No</td>
<td>VarChar(20)</td>
<td>ID used in the local Student Information System to uniquely identify the student in the submitting system. The primary purpose of this field is to provide a mechanism to import student data from the eScholar Unique ID® for Students system back into the local source systems. In addition, this field is used in a limited capacity to match student records within the eScholar Unique ID® for Students system. This field can be set to optional for Online Entry only.</td>
</tr>
<tr>
<td>Social Security Number</td>
<td>No</td>
<td>VarChar(11)</td>
<td>It is not required for matching, but will be used if it is supplied. Matching Field</td>
</tr>
<tr>
<td>Race / Ethnicity</td>
<td>No</td>
<td>VarChar(4 )</td>
<td>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.</td>
</tr>
<tr>
<td>Home</td>
<td>No</td>
<td>VarChar(25)</td>
<td>Batch Search will fail if the Home is submitted.</td>
</tr>
<tr>
<td>Current District Code</td>
<td>No</td>
<td>VarChar(20)</td>
<td>If a value is submitted, it is validated. District Code where the student is currently enrolled. State-defined valid</td>
</tr>
<tr>
<td>Current School Year</td>
<td>No</td>
<td>VarChar(10)</td>
<td>Must have a ‘yyyy’ format.</td>
</tr>
<tr>
<td>Alternate Last Name</td>
<td>No</td>
<td>VarChar(60)</td>
<td>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.</td>
</tr>
<tr>
<td>Alternate ID</td>
<td>No</td>
<td>VarChar(50)</td>
<td>V2 only  This is an ID used in the system defined in the Alternate Source field. If Alternate Source is not applicable then this field is ignored.</td>
</tr>
</tbody>
</table>

**Note:**

- yyyy: Year
- dd: Day
- mm: Month
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Required</th>
<th>Type</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alternate Source</td>
<td>No</td>
<td>VarChar (60)</td>
<td>This is the source name for the Alternate ID field. This can be used to track additional local identifiers or other identifiers. If Alternate ID is required, this field is required.</td>
</tr>
<tr>
<td>Customer Defined Field 1</td>
<td>No</td>
<td>VarChar (25)</td>
<td>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.</td>
</tr>
<tr>
<td>Customer Defined Field 2</td>
<td>No</td>
<td>VarChar (25)</td>
<td>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.</td>
</tr>
<tr>
<td>Customer Defined Field 3</td>
<td>No</td>
<td>VarChar (25)</td>
<td>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.</td>
</tr>
<tr>
<td>Customer Defined Field 4</td>
<td>No</td>
<td>VarChar (25)</td>
<td>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.</td>
</tr>
<tr>
<td>Customer Defined Field 5</td>
<td>No</td>
<td>VarChar (25)</td>
<td>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.</td>
</tr>
<tr>
<td>Customer Defined Field 6</td>
<td>No</td>
<td>VarChar (25)</td>
<td>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.</td>
</tr>
<tr>
<td>Customer Defined Field 7</td>
<td>No</td>
<td>VarChar (25)</td>
<td>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.</td>
</tr>
<tr>
<td>Field</td>
<td>Required</td>
<td>Data Type</td>
<td>Notes</td>
</tr>
<tr>
<td>-------</td>
<td>----------</td>
<td>-----------</td>
<td>-------</td>
</tr>
<tr>
<td>8</td>
<td></td>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Record Status</td>
<td>No</td>
<td>V2 only</td>
<td>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.</td>
</tr>
<tr>
<td>Record Reference Number</td>
<td>No</td>
<td>V2 only</td>
<td>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.</td>
</tr>
<tr>
<td>Ethnicity Indicator</td>
<td>No</td>
<td>VarChar (4)</td>
<td>No</td>
</tr>
<tr>
<td>Race 2 Code</td>
<td>No</td>
<td>VarChar (10)</td>
<td>No</td>
</tr>
<tr>
<td>Race 3 Code</td>
<td>No</td>
<td>VarChar (10)</td>
<td>No</td>
</tr>
<tr>
<td>Race 4 Code</td>
<td>No</td>
<td>VarChar (10)</td>
<td>No</td>
</tr>
<tr>
<td>Race 5 Code</td>
<td>No</td>
<td>VarChar (10)</td>
<td>No</td>
</tr>
<tr>
<td>Record Update Date</td>
<td>No</td>
<td>VarChar (10)</td>
<td>No</td>
</tr>
</tbody>
</table>
Appendix E: Section 508 of the Rehabilitation Act Compliancy

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