



*Office of Data System Management*

# DirectMatch User Guide

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MOSIS ID Direct Certification Match

Updated 6/30/2020



Office of Data System Management

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## DirectMatch Overview

Please use this guide to navigate the DirectMatch module for completing the process of direct certification of your students. This guide will walk you through the processes of signing into the MOSIS: ID Assignment system (DirectMatch module), matching options, resolving near matches and downloading a completed direct certification report.

The DirectMatch module is located within MOSIS: ID Assignment. MOSIS State IDs can easily be sourced for direct certification when they are up to date with the current school year and current enrollment information. When IDs are up to date, there is no need to upload any student record files into the system.

DirectMatch has been made available to public and non-public LEAs for the use of direct certification.

***Note to non-public LEAs:*** Non-public LEAs will only have access to the DirectMatch module of MOSIS: ID Assignment and will only have the matching options of uploading a file and entering online.

### Direct Certification

The direct certification process for public LEAs should now be completed in the new DirectMatch module of MOSIS: ID Assignment.

Non-publics will still have access to the zip code file but also have the option of using DirectMatch.

All Food and Nutrition program requirements have remained the same.

### Updates

If you are not the MOSIS or Core Data contact for your district, please sign up for the MOSIS listserv. You will receive all email notifications sent out in relation to MOSIS: ID Assignment/ DirectMatch trainings, webinars and announcements. Subscribe here: <https://dese.mo.gov/data-system-management/listservs>.

### Matching

The DirectMatch module takes student information that is sourced or uploaded to the module and matches against the Department of Social Services (DSS) file. The DSS file is uploaded to the DirectMatch module every Monday. It is important to complete all batches created within the week to ensure all information is accurate in comparison to the specific weekly DSS file.

## Non-Public LEA DirectMatch Guidance

*This information pertains only to non-public LEAs in Missouri.*

The DirectMatch module within MOSIS: ID Assignment has been made available to non-public LEAs to direct certify students for free lunch. Non-Public LEAs will follow the same process noted above in steps 1-4. However, please be aware that the State ID Source matching option will not be available to non-public LEAs.

### DirectMatch File Upload

Matching Option 3 (File Upload) is the recommended option for Non-Public LEAs. The DirectMatch module has specific data and file layout requirements when using this option. Please see the following file creation options below that will meet these data requirements:

- Existing Vendor Export: Student Information System (SIS) vendors that service Missouri public schools have been made aware of the data and file layout requirements needed to upload files to the DirectMatch module. Please contact your SIS representative to see if they are one of these vendors.
- Create Vendor Export: If your vendor is not currently servicing Missouri public schools but is interested in creating an export from their SIS, documentation and testing can be provided by the Office of Data System Management. Please see our contact information below.
- Template Upload: An Excel DirectMatch 3.0 template can be used to upload student information. The file layout template can be found at <https://dese.mo.gov/data-system-management/core-datamosis/file-layouts-2020-2021>. Instructions for creating the file can be found within the Excel file layout template and in Appendix I of this manual.

## Matching Overview

DirectMatch allows three options for matching: State ID Sourcing, Enter Online and File Upload. Step-by-step instructions for these matching options can be found throughout this manual.

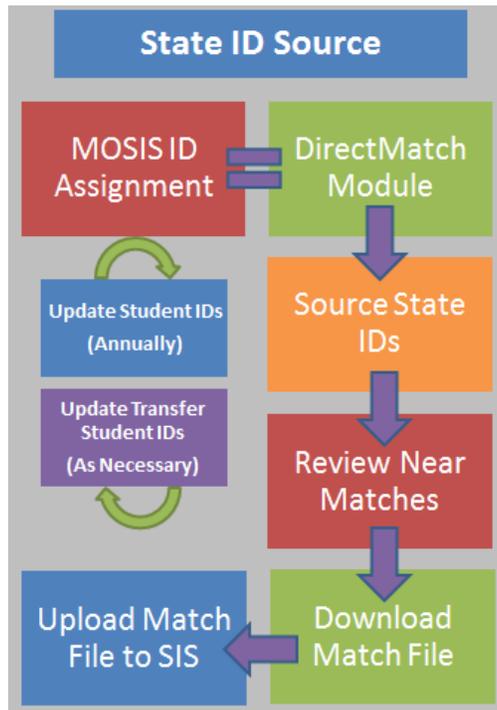
The Department of Elementary and Secondary Education (DESE) recommends the State ID Sourcing matching option. The procedure for this matching option can be found in Step 2: Option 1.

### State ID Sourcing (Option 1)

This option allows districts to “source” the MOSIS ID Assignment System to direct certify students. This means that DirectMatch is matching currently enrolled students with a current school year within the MOSIS ID System against DSS’s file.

Student information must be up to date and reflect the current school year to utilize this option. This process can be completed by uploading a batch file to MOSIS: ID Assignment. **IDs must be updated at least annually to reflect current information.** Please refer to the MOSIS: ID

Assignment procedures located on the Core Data/MOSIS training webpage for instructions on how to update student State IDs. This option is only available to public LEAs.



**Enter Online (Option 2)**

The Enter Online matching option allows LEAs to direct certify one student at a time.

**File Upload (Option 3)**

The File Upload matching option requires a file that meets the requirements of the 3.0 layout. Please contact your SIS vendor to inquire if they have an export available. A template for this file layout can be found at <https://dese.mo.gov/data-system-management/core-datamosis/file-layouts-2020-2021>.

Non-public LEAs will only have the matching options of uploading a file and entering online.



## Exclude Previously Matched Records

The DirectMatch module has been enabled to exclude previously matched records from the matching process within a school year. What does this mean?

1. **The first batch submitted for the year:** The matching engine will look at all students submitted in a batch (State ID Sourcing, Enter Online and File Upload).
2. The system will return a list of Near Matches that must be resolved.
  - a. Near Matches that are marked as a **Match** will have the match decision maintained for one year and excluded from all future batches.
  - b. Near Matches that are marked as a **No Match** will be ran through future batches to ensure matches are made if applicable.
3. The first Match download for the year will contain all matches for the students submitted in that batch.
4. Additional batches created throughout the year will excluded all previously matched records. Near Matches will still need to be resolved.
5. The subsequent Match download files will only contain newly matched students.
  - a. If no students were matched, the system will show the following when the Download button is selected:

DirectMatch - **Download with Options** - Batch 670768

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No records exist for the default batch status: Match. Please select a different available record status to extract and download.

6. The batch number in the Batch Info column on the DirectMatch dashboard can also be selected to show whether there are any matches within the batch.

Batch Information: <b>Batch 670768</b>	
STATISTICS PROCESSING DOWNLOADS GENERAL	
<b>MATCH / NO MATCH</b>	
No Match	4761
No Match - Selected during Match Resolution stage	3

*Note: It is important to remember that a full list of matched students for the year will only be available for download with the My Students report.*

# DirectMatch Step by Step

Complete the following steps to complete your direct certification process in DirectMatch.

## Step 1: Sign In

### Sign in to DirectMatch

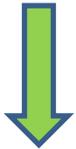


**Note to Public LEAs:** Access to the DirectMatch module must be granted to the user by the district user manager. **The user manager will have to verify the district PIN code before the new security role of MOSIS Direct Certification Match can be assigned.** If your user manager does not know the district PIN code, the district's superintendent must contact [wepappsloginassistance@dese.mo.gov](mailto:wepappsloginassistance@dese.mo.gov) and request the PIN code.

**Note to Non-public LEAs:** Access to DirectMatch has been granted to the school's food service representative by DESE. If you have any questions, please contact your DESE food service representative.

## Step 2 Matching

### Select a Matching Option



**Option 1** – State ID Sourcing

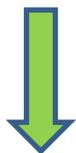
**Option 2** – Enter Online

**Option 3** – File Upload

Canceled Records Review (must be reviewed for Matching Options 2 and 3)

## Step 3: Resolve Near Matches

### Resolve Near Matches



– Match Record

– No Match Record

– Cancel Record

## Step 4: Download File

### Select a File Download Option

**Option 1** – Match

**Option 2** – No Match

**Option 3** – Canceled Records

## Step 1: Sign In

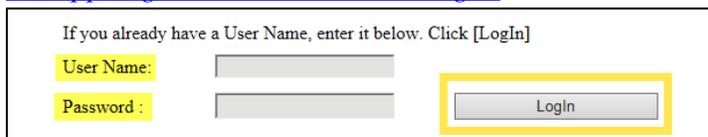
### DirectMatch Sign In

1. Start at <https://dese.mo.gov/> and click on the Web Applications icon in the middle of the webpage.

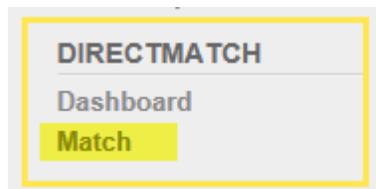
*If you do not have access, please contact your district user manager to gain access to Web Applications.*



2. Sign in to Web Applications with your username and password, and then click LogIn.  
*Having trouble logging into your account? Please email [webappsloginassistance@dese.mo.gov](mailto:webappsloginassistance@dese.mo.gov) or call 573-522-3207.*

A login form with the text 'If you already have a User Name, enter it below. Click [LogIn]'. Below this are two input fields: 'User Name:' and 'Password :'. To the right of the password field is a 'LogIn' button, which is highlighted with a yellow border.

3. Depending on the level of access that the user has been granted, click the link that is available to you.
  - **MOSIS: ID Assignment** (*MOSIS ID Assignment and DirectMatch*)
  - **MOSIS: Direct Certification Match** (*DirectMatch only. If you do not see this option, contact your district user manager for access.*)
4. Click the “I Agree” button to agree to the terms and enter the system.
5. Click on the menu button  at the top of the screen. You will see the DirectMatch section below. Select Match to start the direct certification matching process.



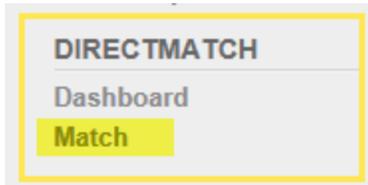
6. You will have the option to “source” the State ID System, Upload a File or Enter Online.

## Step 2.1 Matching Option 1

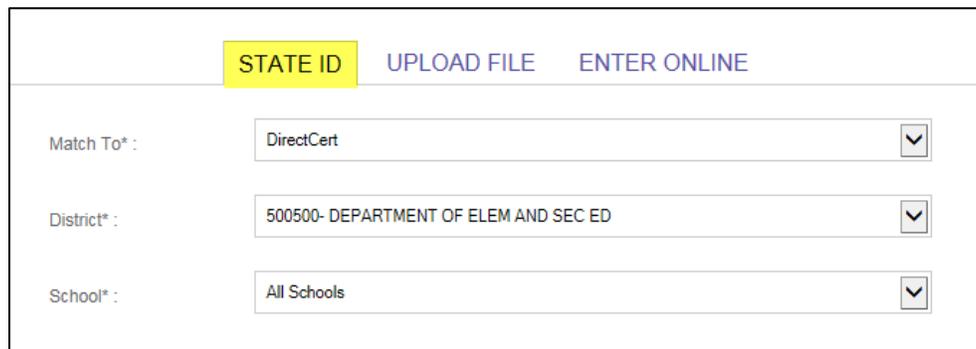
### State ID Sourcing (*Recommended Option*)

DirectMatch State ID Sourcing uses the student data in the MOSIS: ID Assignment module to match against the information provided by DSS. *This option is only available for public LEAs.*

1. Click on the menu button  at the top left of the screen. You will see the DirectMatch section below. Select Match to start the direct certification matching process.



2. Select the STATE ID tab to source the MOSIS ID system.
  - a. Match To: Always DirectCert.
  - b. District: The system is defaulted to the user's district.
  - c. School: Always All Schools.

A screenshot of a web form. At the top, there are three tabs: 'STATE ID' (highlighted in yellow), 'UPLOAD FILE', and 'ENTER ONLINE'. Below the tabs are three dropdown menus. The first is labeled 'Match To\*' and has 'DirectCert' selected. The second is labeled 'District\*' and has '500500- DEPARTMENT OF ELEM AND SEC ED' selected. The third is labeled 'School\*' and has 'All Schools' selected.

3. Click Match to start the matching process.
4. Click Back To Dashboard.
5. **The data validation and matching time will depend on the size of the enrollment that was submitted. Please click the Refresh button  at the top of your browser or select Dashboard from the menu to check the matching status.**

*If there are near matches that need to be resolved, the  button will be displayed. Please refer to Step 3: Resolve Near Matches for further information in relation to resolving DirectMatch Near Matches.*

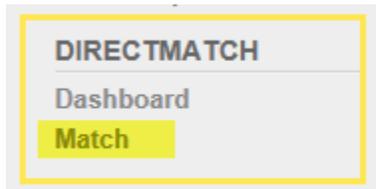
6. If there are no Near Matches, the file is ready to download. Please refer to Step 4: File Download for further information in relation to downloading the DirectMatch direct certification file.

## Step 2.1 Matching Option 2

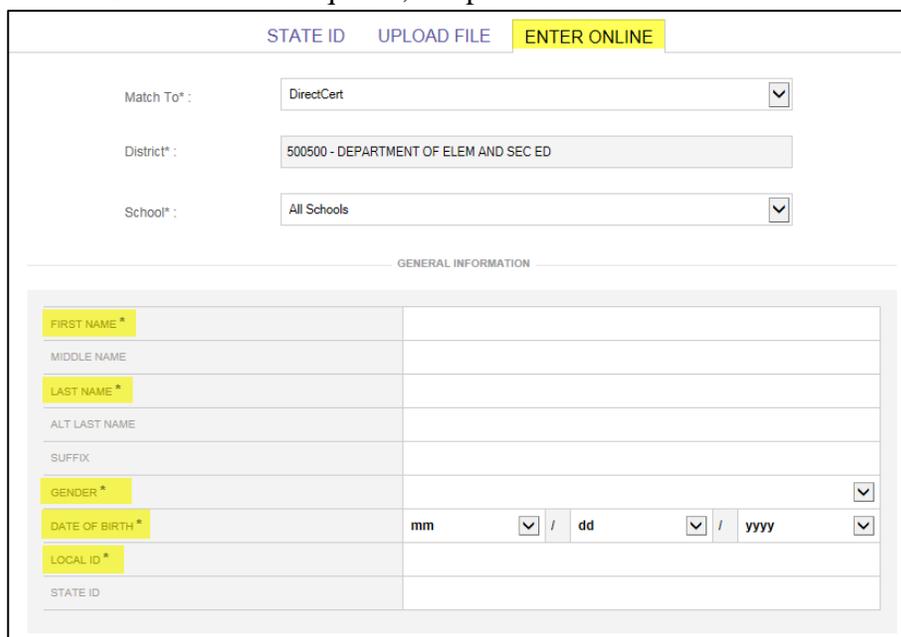
### Enter Online

The Enter Online matching option allows LEAs to match students one at a time.

1. Click on the menu button  at the top left of the screen. You will see the DirectMatch section below. Select Match to start the direct certification matching process.



2. Select the Enter Online tab to match a single student.
  - a. Match To: Always DirectCert.
  - b. District: The system is defaulted to your district.
  - c. School: Always All Schools.
3. Complete the required fields highlighted in yellow and click .
  - a. Middle Name is not required but will be used in matching if provided.
  - b. State ID is not required, but please enter if available.

A screenshot of the "ENTER ONLINE" form. At the top, there are tabs for "STATE ID", "UPLOAD FILE", and "ENTER ONLINE". Below the tabs are three dropdown menus: "Match To\*" (set to "DirectCert"), "District\*" (set to "500500 - DEPARTMENT OF ELEM AND SEC ED"), and "School\*" (set to "All Schools"). Below these is a section titled "GENERAL INFORMATION" with a table of input fields. The fields are: "FIRST NAME \*", "MIDDLE NAME", "LAST NAME \*", "ALT LAST NAME", "SUFFIX", "GENDER \*", "DATE OF BIRTH \*", "LOCAL ID \*", and "STATE ID". The "DATE OF BIRTH" field is split into "mm", "dd", and "yyyy" dropdowns. The "FIRST NAME", "LAST NAME", "GENDER", and "DATE OF BIRTH" fields are highlighted in yellow.

If there are near matches that need to be resolved, the  button will be displayed. Please refer to Step 3: Resolve Near Matches for further information in relation to resolving DirectMatch Near Matches.

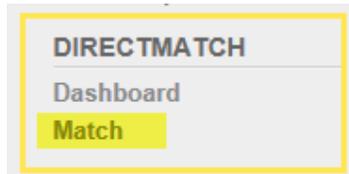
4. If there are no near matches, the file is ready to download. Please refer to Step 4: File Download for further information in relation to downloading the DirectMatch direct certification file.

## Step 2.1: Matching Option 3

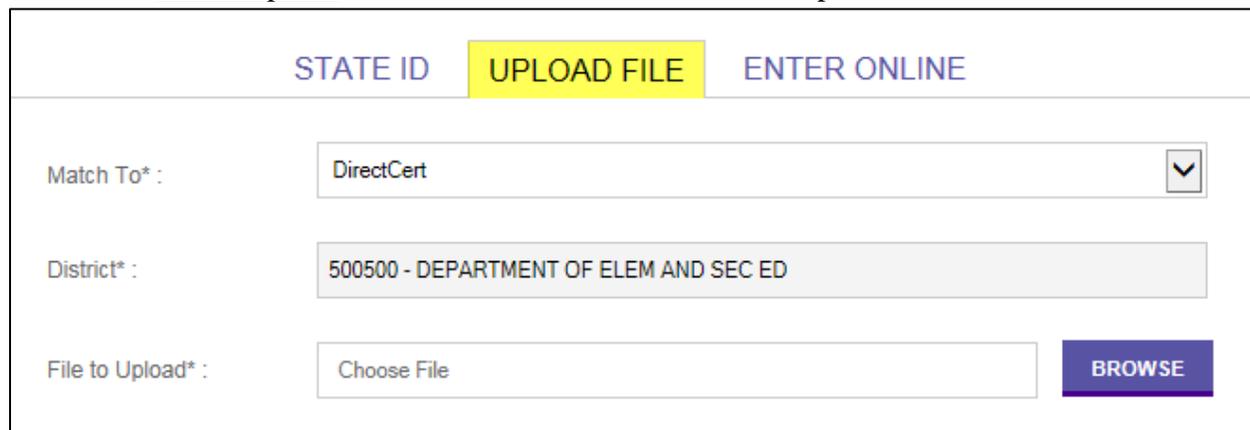
### File Upload

This matching option requires a 3.0 version file layout. Please contact your vendor for a file extract that meets these file requirements, or see the 3.0 DirectMatch template located on the DESE webpage: <https://dese.mo.gov/data-system-management/core-datamosis/file-layouts-2020-2021>. Template instructions can also be found in Appendix I of this manual.

1. Click on the menu button  at the top left of the screen. You will see the DirectMatch section below. Select Match to start the direct certification matching process.



2. Select the Upload File tab to upload a batch file exported from your SIS vendor or template.
  - a. Match To: Always DirectCert.
  - b. District: The system is defaulted to your district.
  - c. File to Upload: Click Browse and select the file to upload.

A screenshot of the DirectMatch upload form. At the top, there are three tabs: 'STATE ID', 'UPLOAD FILE' (highlighted in yellow), and 'ENTER ONLINE'. Below the tabs, there are three input fields: 'Match To\*' with a dropdown menu showing 'DirectCert', 'District\*' with a text field containing '500500 - DEPARTMENT OF ELEM AND SEC ED', and 'File to Upload\*' with a text field containing 'Choose File' and a 'BROWSE' button. At the bottom of the form, there is a 'MATCH' button.

3. Click  to start the matching process. (Please see the note below if your file is not being accepted.)
4. Click Back To Dashboard.
5. **The data validation and matching time will depend on the size of the enrollment that was submitted. Please click your Refresh button  at the top of your internet browser or select Dashboard from the  to check the matching status.**

*If there are near matches that need to be resolved, the  button will be displayed. Please refer to Step 3: Resolve Near Matches for further information in relation to resolving DirectMatch Near Matches.*

6. If there are no near matches, the file is ready to download. Please refer to Step 4: File Download for further information in relation to downloading the DirectMatch direct certification file.

*Note: Please be aware that the DirectMatch module will only accept the 3.0 file layout. All other file layouts will be rejected or be stuck in a Continue Validation stage that will not complete. A 3.0 file layout template containing the required fields can be viewed at <https://dese.mo.gov/data-system-management/core-datamosis/file-layouts-2020-2021>.*

*Contact your SIS vendor to determine if you have the correct file layout.*

*See Appendix II of this manual for more information.*

## Step 2.2: Canceled Records

### Reviewing Canceled Records

Canceled records can occur throughout the DirectMatch direct certification processes. It is important to know what records have been canceled to ensure all the required students are being run through the matching process. Please see the different classes of canceled records below.

### Canceled – During Data Validation Stage

Records uploaded to DirectMatch must pass system data validation to ensure all the information submitted meets the data requirements. When a student record does not meet all the data requirements, the record is canceled and will not proceed through the matching process. Below are the common canceled record messages that can occur during data validation and the reason why records may be canceled during this process.

- **Required fields are not present:** All required fields must be included in the student record and in the correct format.
- **User is not authorized to submit person for the specified district:** DirectMatch is looking for the user's ResidentDistrictCode and CurrentDistrictCode. If you are feeding students that do not reside in your district, there are two options:
  - **To use the State ID Sourcing option (Option 1):** Update the student information in MOSIS: ID Assignment to reflect your district.
  - **To use the File Upload option (Option 3):** Update the file to reflect your district in the ResidentDistrictCode and CurrentDistrictCode fields.
- **SSN is not allowed:** The state of Missouri does not collect social security numbers. If any information is located in the SSN field, the record will be canceled.

**Attention:** There is **NO** prompt to determine if any records within a batch have been canceled. To determine if records within a batch have been canceled, click on the batch number in the Batch Info column located on the DirectMatch dashboard. Canceled record statuses will be listed in the Canceled section.

Batch Information: **Batch 670731**

STATISTICS **PROCESSING** DOWNLOADS GENERAL

MATCH / NO MATCH

No Match	1
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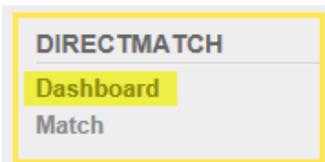
**CANCELED**

Canceled - During data validation stage	2
Canceled During Data Validation Stage - SSN is not allowed	1

CLOSE WINDOW

**To view the specific reason a record was canceled:**

1. Click on the menu button  at the top left of the screen. You will see the DirectMatch section below. Select Dashboard.



2. Select the wheel icon  in the specific batch row to select the canceled records that you want to download.
3. Select the radio button next to Canceled to review all the canceled records within the batch.

STATUS	STATUS RECORD COUNT	TOTAL BATCH RECORD COUNT
<input type="radio"/> Match / No Match	1817	1821
<input type="radio"/> Match	39	1821
<input type="radio"/> No Match	1778	1821
<input checked="" type="radio"/> Canceled	4	1821

4. Click the **DOWNLOAD** button at the bottom of the page. Then click **DOWNLOAD** again. You will then be able to open or save your file.
5. Once the file has been downloaded, open the text file and scroll to the far right of the file. The canceled record reasons will be noted here.

File	Edit	Format	View	Help
Canceled - During data validation stage			User is not authorized to submit student for the specified district.(002017)	7687 04/25/2018
Canceled - During data validation stage			Gender is not present	7687 04/25/2018
Canceled During Data Validation Stage - SSN is not allowed			SSN is not valid at validation	7687 04/25/2018

6. Correct the errors listed in the canceled records file and re-upload your DirectMatch 3.0 upload file, or use the Enter Online matching option.

## Step 3: Resolve Near Matches

### Near Match Resolution

DirectMatch Near Matches occur when the student information located in the MOSIS: ID Assignment system or batch upload is compared to the DSS direct certification information and has a match probability less than what is required to be considered an exact match (less than 94%). *Note: Near matches must be resolved before student direct certification information can be downloaded.*

To begin the Near Match Resolution process:

1. Select the RESOLVE button to review all the near matches in your batch.
2. All Near Matches that need to be resolved will appear.
3. Click on the student's first name, last name or the REVIEW AND SELECT button to review the near match.
4. Click on the student's first name or last name to compare the submission record (*MOSIS ID/upload record*) and the master record (*DSS record*).
5. The DirectMatch Compare Near Match page contains the submission record (*MOSIS ID/upload record*) and the master record (*DSS record*) that is considered as a near match. The highlighted fields shown in yellow below note the differences between the two records. See the sample comparison below.

FIELDS	SUBMISSION RECORD	DIRECTCERT INDEX RECORD (DSS)
STUDENT FIRST NAME	CARRIE	CARRIE
STUDENT LAST NAME	BRADSHAW	BRADSHAW
STUDENT MIDDLE INITIAL		MARIE
SUFFIX		
PREVIOUS LAST NAME		
DATE OF BIRTH	12/12/2001	12/12/2001
GENDER	FEMALE	FEMALE
RACE	WHITE	
DISTRICT CODE	500500	
SCHOOL CODE	1050	
GRADE	07	
SOURCE	Default	
LOCAL STUDENT ID	1234	
STATE STUDENT ID	1234567891	
ADDRESS 1		66 PERRY ST
ADDRESS 2		
CITY		NEW YORK
STATE		NEW YORK
CASE NUMBER		222222
GUARDIAN FIRST NAME		GRACE
GUARDIAN LAST NAME		BRADSHAW
MATCH DATE		1/12/2015
MATCH NOTES	{NEAR MATCH}	

6. Once the comparison information has been reviewed, you have the following options below:

CANCEL RECORD

**Be aware that if a near match record is canceled, that student will not be matched against the DSS master file.**

The canceled student will need to be matched again to determine direct certification eligibility. This can be done by utilizing the Enter Online function of DirectMatch matching options.

**Example:** “There was an error in the information that was sourced or uploaded; this record should be canceled.”

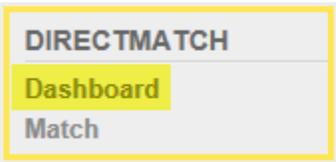
NO MATCH

**Example:** “The student in the master record (DSS) resides in another city and has a different date of birth. I know that this is not a student that is enrolled in our district.”

MATCH

**Example:** “The student’s name was reported slightly different in the master record (DSS), but I know for a fact that the student is enrolled in our district.”

7. Once all near matches are resolved, the DirectMatch certification file can be downloaded. Select the menu  icon and select Dashboard to review your download options.



DIRECTMATCH  
Dashboard  
Match

*Please refer to Step 4: File Download for further information in relation to downloading the direct certification student information.*

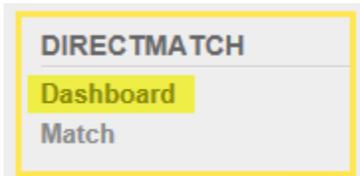
*Note: A new DSS file is loaded to DirectMatch every Monday morning. Because of this, all near matches within a batch must be resolved before the new file is loaded. If near matches are not resolved, they will be automatically canceled by the system.*

## Step 4: File Download

### DirectMatch File Download

Once the system has been sourced or a batch has been uploaded and near matches have been resolved, the direct certification file is ready to download.

1. Start at the DirectMatch Dashboard.



2. Select the wheel icon  in the batch row to select information that you want to download. You will have the option to download information with the statuses pictured below. (If there are no canceled records, the Canceled option will not be shown.)

STATUS	STATUS RECORD COUNT	TOTAL BATCH RECORD COUNT
<input type="radio"/> Match / No Match	1810	1819
<input checked="" type="radio"/> Match	30	1819
<input type="radio"/> No Match	1780	1819
<input type="radio"/> Canceled	9	1819

*Note: This screen also shows the number of records per status field and the total number of records in the batch.*

3. Once the download records have been specified, the file format will need to be defined. Please contact your SIS vendor to determine if their system requires a specified format for the fields highlighted in yellow (most vendor systems are programmed with the default settings noted below and fields will not need to be selected):
  - Delimiter: Tab or Comma
  - Qualifier: " or ' (or leave blank)
  - Include Header/Footer: Yes or No

All other fields are defaulted and require no action.

AVAILABLE OPTIONS TO DOWNLOAD

Batch Number:

Template:  ▼

Delimiter:  ▼

Qualifier:  ▼

Date Format:  ▼

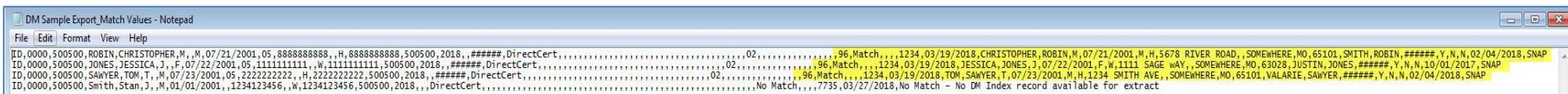
Include Header/Footer:  Yes  No

4. Click the **DOWNLOAD** button at the bottom of the page. Then click **DOWNLOAD** again. You will then be able to open or save your file.
5. A sample download file in the 3.0+ format can be viewed below. Scroll to the far right of the file to view the direct certification and recommended program information.

*Note: The DirectMatch 3.0+ template can be used to view the downloaded information more clearly by copying and pasting the information into the template. The 3.0+ template can be viewed at <https://dese.mo.gov/data-system-management/core-datamosis/file-layouts-2020-2021>. The template will be found in the DirectMatch section of the webpage.*

### Sample 3.0+ Match File Download Review

A sample 3.0+ layout can be viewed below. This is the full file containing all 98 fields. The last 27 fields of the file pertain to the student's direct certification information (highlighted in yellow). These fields are also described below.



	DOWNLOAD FIELDS	MATCH RESULTS	FIELD DESCRIPTION	NO MATCH RESULTS
Match / No Match Information	Match Score	96	Match Score Percentage	N/A
	ID Record Status	MATCH	Match / No Match	No Match
	Location Status	N/A	N/A	N/A
	Event Status	N/A	N/A	N/A
	Record Reference Number	N/A	N/A	N/A
	Last Updated User ID	1234	User That Ran the Report	1234
	Record Update Date	3/19/2018	DirectMatch Match Date	3/27/2018
Comments	Comments will only appear for "No Matches"		No Match-No DM Index Record Available for Extract	
Student Information	First Name	Christopher	Student Information	
	Last Name	Robin	"	
	Middle Initial	M	"	
	Date of Birth	7/21/2001	"	
	Gender	M	"	
	Race	H	"	
	Address Line 1	5678 River Road	"	
	Address Line 2		"	
	City	Somewhere	"	
	State Code	MO	"	
	Postal Code	65101	"	
Guardian First Name	Smith	"		
Guardian Last Name	Robin	"		
Program Information	DSS ID	#####	Fictitious # /Not True DSS ID	
	SNAP	Y	Program the Student Qualifies For	
	TANF	N	"	
	Foster	N	"	
	Match Date	2/4/2018	Date the Student Qualified for Services	
	Recommended Program	SNAP	Recommended Program (SNAP, TANF, Foster)	

## My Students Report

The My Students report is a new function within DirectMatch that allows users to view, search and download students who have been matched in DirectMatch.

### To Access My Students:

1. Click on the menu button at the top left of the screen. You will see the DirectMatch section below. Select My Students.



2. The My Students page lists out all the students that have been matched within a specified school year.
3. Users can select the following filters to build the My Students report:
  - a. **District:** Users will only see their district.
  - b. **School:** Users have the ability to filter for Match and No Match students by school building. Click on the School dropdown to select which school you want to view. If you want to view students in all buildings, select All Schools.
  - c. **Match Type:** Always DirectCert.
  - d. **Status:** Users can select to view students with a Match or No Match status.
  - e. **Group By:**
    - **Public LEAs:** Users should select LOCAL ID/Source in the Group By dropdown to ensure all students are represented. If a match file was uploaded or student was entered online without a State ID, the record would not appear if the Group By was filtered with State ID.
    - **Non-Public LEAs:** Users must select LOCAL ID/Source in the Group By filter to ensure all students are represented.
  - f. **ID:** This allows users to search for a single student's Match and/or No Match records.
  - g. **School Year:** User can select a school year and display the students that were matched or not matched within that school year. Click in the School Year box to change the school year.
  - h. **Sort:** Users can select how the file will be sorted.
    - Last Name (Ascending/Descending)
    - State ID (Ascending/Descending)
    - Local ID (Ascending/Descending)
    - Match Date (Ascending/Descending)
4. Once the user has selected the applicable filters, click the FILTER RESULTS button. The results will be shown on that same page.
5. Scroll to the bottom of the page and select DOWNLOAD OPTIONS.
6. The download options are defaulted to the correct requirements needed to import the file into a vendor SIS.

7. Select GENERATE EXTRACT(S) and click OK.
8. The My Students report is now generating. Click on REFRESH until the download button appears.
9. Click DOWNLOAD to view your file.
10. The downloaded My Students report can be imported back into the vendor SIS if needed.

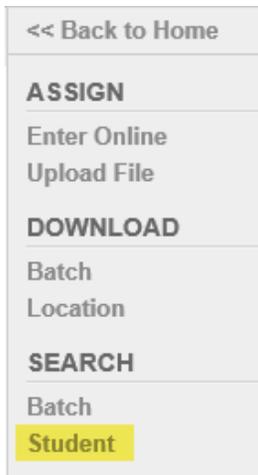
## Deleting Match Records

If a student is matched in error, the match record can be deleted. *(This option is only available public LEAs with MOSIS: ID Assignment **and** DirectMatch access.)*

**IMPORTANT:** It is recommended that the match student record be reviewed and investigated before the record is deleted. It is recommended that a process be developed to monitor the deletion of match records.

To delete a matched record, follow the steps below:

1. Click on the menu button at the top left of the screen. Select Student under the Search section.



2. Search for the student in question using the Basic, Advanced or ID Search options.
3. Select the correct student from your district.
4. The webpage will default to the Master Record tab for the student. Select the DirectMatch tab to view the Match/No Match records for the student.
5. A listing of Match/No Match records will be listed for the student.
6. Select the radio button next to the match record that was made in error.
7. Click the DELETE MATCH button to delete the match.

# DirectMatch Tab Overview

*Reminder:* This option is only available to public LEAs with MOSIS: ID Assignment and DirectMatch access.

STATE ID HOME

Student Search - Individual Student Information

GENDER: [REDACTED] DATE OF BIRTH: [REDACTED] LOCAL ID: [REDACTED] PERSON TYPE: Student LAST UPDATED: 07/05/2018 11:00 ID CREATED: 07/21/2018 11:30

MASTER RECORD HISTORY ASSOCIATED RETIRED ID: **DIRECTMATCH** #1 ADD NOTE

MATCH TO: ALL SCHOOL YEAR: [REDACTED] SORT: Match Date Desc FILTER RESULTS

MATCH DATE	MATCH TO	MATCH DECISION	SCHOOL YEAR	DISTRICT	SCHOOL	LOCAL ID	SOURCE	BATCH NUMBER	CASE NUMBER
07/10/2018 15:50	DirectCert	Match - Selected during Match Resolution stage	2019	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
04/09/2018 14:20	DirectCert	Near Match pending resolution	2018	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Displaying 1 - 2 of 2 << FIRST < PREVIOUS PAGE 1 OF 1 NEXT >> LAST >>

\* - A person record will not be sent to match again once it has been tagged as a "Match" within the same school year

BACK TO SEARCH RESULTS DELETE MATCH #3

*Personal information is blocked from viewing in this example.*

## **IMPORTANT**

- The DirectMatch tab shows all dates and batches a student was matched/not matched.
- The user must have access to both MOSIS: ID Assignment and DirectMatch to delete a match.
- Matches can only be deleted by the district that created the match record and within the current school year.
- Once a match is deleted, the record will no longer appear on the My Students report for that school year.

## Appendix I: DirectMatch Batch 3.0 Template

The Office of Data System Management has created a template that can be used to upload student information for DirectMatch direct certification for public and non-public LEAs that do not have a SIS vendor system 3.0 file export. The DirectMatch template can be found at <https://dese.mo.gov/data-system-management/core-datamosis/file-layouts-2020-2021>.

### Data Requirements

The DirectMatch system requires 78 field positions to be included in the 3.0 DirectMatch file layout. DESE only requires 17 of the 78 fields to be populated with information.

The required fields noted below are highlighted in yellow in the DirectMatch Batch 3.0 Template. (The remaining 61 field columns have been hidden in the Excel file. These fields must be present in all uploads but may remain hidden.)

Four of the 16 required fields have a specific code that must be used. These codes are highlighted in gray below. The available code sets can be found on the third tab of the DirectMatch Batch File 3.0 Template.

Field	Description	Specifications	Column
RecordType	Always "ID"	2 characters	A
CurrentSchoolCode	Where the student is currently enrolled	4-digits	B
ResidentDistrictCode	DESE assigned County District Code	6-digits	C
LegalLastName	Legal Last Name		D
LegalFirstName	Legal First Name		E
LegalMiddleName	Legal Middle Name (not required, but provide if applicable)		F
Gender	Student Gender	M,F	H
DateofBirth	Date of Birth	MM/DD/YYYY format	I
CurrentGradeLevel	Current Grade Level	See available codes	J
LocalStudentID	Local Student ID		K
RaceEthnicity	Race/Ethnicity (1 character)	See available codes	M
CurrentDistrictCode	DESE assigned County District Code were the student is enrolled	6-digits	O
CurrentSchoolYear	The current school year (exp: 2018-2019, use 2019)	4-digits	P
SubmissionPurpose	Always "001"	3-digits	BC
Person Type	Person Type	See available codes	BD
ActiveInactiveIndicato	Active / Inactive Indicator	See available codes	BE
RecordUpdateDate	Always "1"	1-digit	BZ

## Header and Trailer Requirements

The file must also include header and trailer rows.

### Header

TH	3/6/2018	08:22:00	N/A	3.0	Delimiter=0x09	source=Default
----	----------	----------	-----	-----	----------------	----------------

The header row should look like the sample above. The date and time in the header row need to be updated to reflect the current date and time that the file is being uploaded. (You do not have to complete the Seconds field, but leave the 00 as a place holder.)

### Trailer

TT	N/A	5
----	-----	---

The trailer row should look like the sample above. The third cell containing the 5 is the total number of records in the file, including the header and trailer rows. This field will need to be updated to reflect the total number of records in the file.

## Completing the DirectMatch Batch 3.0 Template

1. Open the DirectMatch file template. The template can be found at <https://dese.mo.gov/data-system-management/core-datamosis/file-layouts-2020-2021>.
2. Copy and paste the required student information in the Excel spreadsheet.
3. Ensure all fields are formatted correctly.
  - a. ResidentDistrictCode and CurrentDistrictCode should include a leading zero in the file if applicable. Example: 001001 (columns B and O)
  - b. Grades 01-09 should contain the leading zero in the file (column J).
  - c. The SubmissionPurpose and PersonType should include a leading zero (columns BC and BD).
4. Update the header date and time. (See Header information above.)
5. Delete row 2 of the template that contains the column headers. (These cannot be uploaded.)
6. Add the trailer record to the last three cells in your template:
  - a. First cell: Always TT
  - b. Second cell: Always N/A
  - c. Third cell: Total number of rows in the template (including the header and trailer rows)
7. Save the template as Text (tab delimited).
8. Upload your file using the File Upload matching option (option 3).

# Appendix II: DirectMatch Troubleshooting Guide

## DirectMatch Access

1. “I do not see DirectMatch when I sign into Web Applications.”

Public LEAs must be granted access to DirectMatch by the LEA’s user manager. The LEA user manager **must** verify the district’s PIN code **before** the MOSIS: Direct Certification Match access will appear in the access listing.

Non-public LEA authorized representatives have been granted access to DirectMatch. For questions, please contact Food and Nutrition Services at 573-751-3526 or [foodandnutritionservices@dese.mo.gov](mailto:foodandnutritionservices@dese.mo.gov).

2. “The user manager does not know the district’s PIN code.”

If the user manager does not know your PIN code, the LEA’s superintendent must email the DESE User Manager group to retrieve the PIN code. The email must state that the sender is the superintendent and that they are requesting the PIN code for their LEA. Please contact the DESE User Manager group at [webappsloginassistance@dese.mo.gov](mailto:webappsloginassistance@dese.mo.gov).

3. Will users with DirectMatch access be able to view information within the MOSIS ID system?

### Public LEAs

The only MOSIS ID Assignment information that a user with DirectMatch only access will see is the MOSIS: ID Assignment dashboard. They will not be able to view ID batches, see any additional student information or be able to make changes to MOSIS student IDs. The user must have access to MOSIS: ID Assignment to have privileges to the MOSIS: ID Assignment system.

### Non-Public LEAs

Non-public LEAs have been given DirectMatch-only access. MOSIS: ID Assignment student information will not be visible.

## Batch Status Information

1. Batch Status: Rejected

The file that was uploaded is not in the correct 3.0 format layout that is required for DirectMatch. *Note: The old file layout that was used in the Direct Cert Lookup file will not work in the DirectMatch module.*

2. Batch Status: Batch does not contain any records to process.

The file that was uploaded does not contain any records.

## Resolve Near Matches

1. “When I click on the Resolve button, the next page does not contain any near matches.”

This happens when the DirectMatch file that was uploaded by the LEA contains the wrong header information. An example of the incorrect and correct header section can be found below. Please contact your SIS vendor for more information on correcting this issue.

Incorrect: batch\_indicator=S

Correct: batch\_indicator=D

2. “My Near Matches have disappeared before I could resolve them.”

The DSS file is uploaded to DirectMatch weekly (Monday mornings). If a batch was matched against a previously loaded DSS file, the system will automatically cancel the near matches for that batch. It is important to complete all near matches before the next Monday when a new DSS file is uploaded.

## Transferred Students Included in Match Results

1. If the State ID Source matching option was used: The “transferred to” school has not updated the student’s information in MOSIS: ID Assignment to reflect the current school year and enrollment information. The transferred to district can be contacted to update this information.
2. If the File Upload matching option was used: The export file from the SIS vendor is including students that are not currently enrolled. Contact your SIS vendor for the recommended process for excluding these students from the export file.

## Template Information

DirectMatch templates can be found at <https://dese.mo.gov/data-system-management/core-datamosis/file-layouts-2020-2021>.

## My Students

“I am not seeing a full list of my matched students for the current school year.”

- a. Ensure the correct school year is selected.
- b. Ensure the Group By filter is set to LOCAL ID/Source.

## Students Matched in Error

“I have a student that was matched by mistake.”

- a. A student’s match record can be deleted by following the steps listed in Deleting Match Records, p. 19.

## **Training Information**

1. DirectMatch training information can be found at <https://dese.mo.gov/data-system-management/core-datamosis/training>.
2. If you would like to be notified via email about upcoming trainings, webinars and system notifications, please ensure you are subscribed to the MOSIS listserv. Subscribe at <http://lists.mo.gov/mailman/listinfo/mosis>.
3. If you are subscribed to the MOSIS listserv but are not receiving notifications, please check to see if these messages may be in your spam folder. The sender will be “DESE-MOSIS.”

## **Other Questions**

Please contact the Office of Data System Management at 573-522-3207, option 2, or [coredata-mosis@dese.mo.gov](mailto:coredata-mosis@dese.mo.gov) for any additional questions you may have.