



Office of Data System Management

DirectMatch User Guide

MOSIS ID Direct Certification Match
2018

Updated: 7/1/2018



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 is now to 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. Please follow the link to our website to subscribe <http://lists.mo.gov/mailman/listinfo/mosis>.

Matching

The DirectMatch module takes student information that is sourced or uploaded 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 upload.

Non-Public LEA DirectMatch Guidance

The below information only pertains 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. 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. A specific file layout is required 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 vendor 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 the office’s 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 in the following link <https://dese.mo.gov/data-system-management/core-datamosis/file-layouts-2017-2018>. Instructions for creating the file can be found within the excel file layout template and in **Appendix I** of this manual.

Please contact the Office of Data System Management at 573-526-5287 or coredata-mosis@dese.mo.gov for any additional questions you may have.

Matching Overview

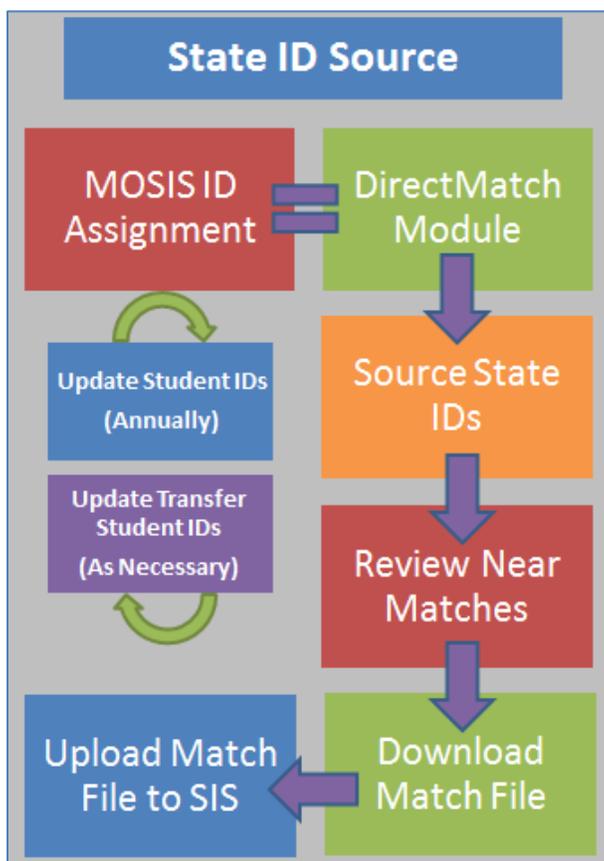
DirectMatch allows three options for matching: “State ID Sourcing”, “Enter Online” and “File Upload”. Step-by-step instructions for these matching options can be found throughout this manual.

DESE recommends the “State ID Source” matching option. The procedure for this matching option can be found in “Step 2: Option 1”. A description of “State ID Source” can be found below.

State ID Source (see 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 Assignment system against the Department of Social Service’s file (DSS 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 the MOSIS ID Assignment System. **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.



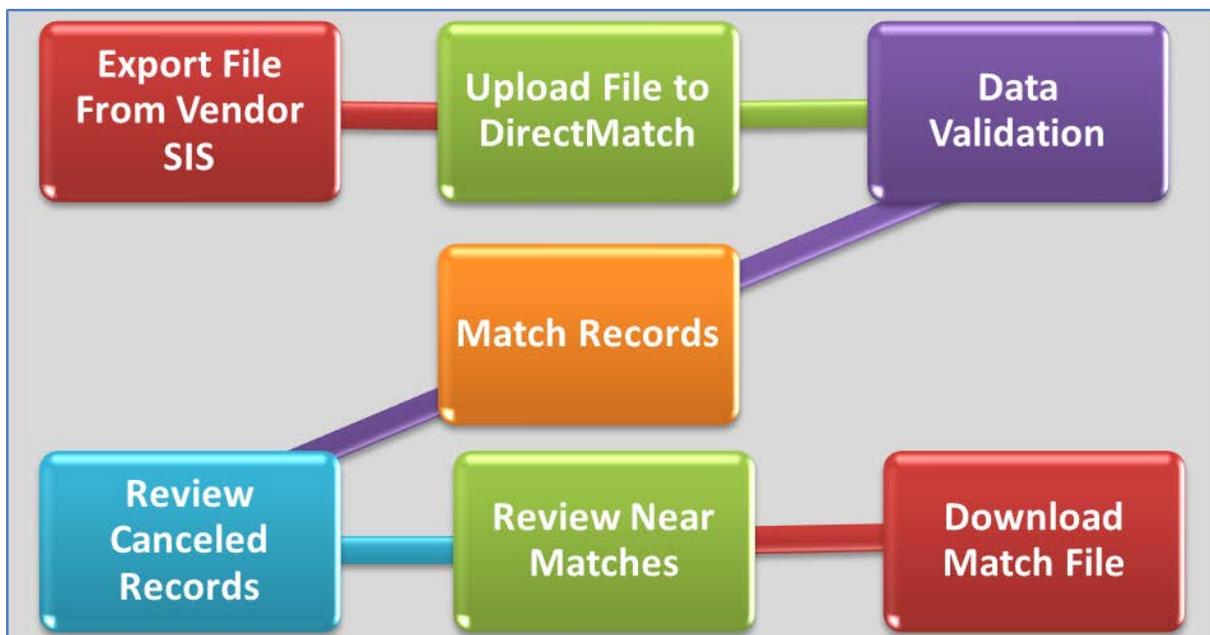
Enter Online Option (see Option 2)

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

File Upload Option (see Option 3)

The “File Upload” matching option requires the 3.0 file layout. Please contact your student information system (SIS) vendor to inquire if they have an export available. A template for this file layout can be viewed at the following link <https://dese.mo.gov/data-system-management/core-datamosis/file-layouts-2017-2018>.

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. So, 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 Source, File Upload, and Enter Online).
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 will be excluded from all future batches.
 - b. Near Matches that are marked as a **“No Match”** will be included in 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 exclude all previously matched records. Near Matches 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

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 the DirectMatch dashboard can also be selected to show whether there are any matches within the batch.

Batch Information: Batch 670768	
<div style="display: flex; justify-content: space-around;"> STATISTICS PROCESSING DOWNLOADS GENERAL </div>	
MATCH / NO MATCH	
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. Please see the “My Students” Report section (pg. 21) for more information.

DirectMatch Step-by-Step Overview

Below is a step-by-step overview of the direct certification process in DirectMatch.

Step 1: Sign In

Sign into DirectMatch



Note to Public LEAs: Access to the DirectMatch module must be granted to the user by the district's user manager. **The user manager will have to verify the district's 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 webappsloginassistance@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

Matching Options



Option 1 – State ID Sourcing

Option 2 – Enter Online

Option 3 – File Upload

Canceled Records Review (must be reviewed for Matching Options 2 & 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

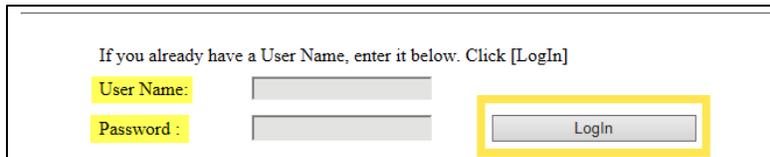
Step 1: Sign In

DirectMatch Sign In

1. Start at the Missouri Department of Elementary and Secondary Education’s website at www.dese.mo.gov and click on the “Web Applications” icon in the middle of the webpage. *If you don’t have access, please contact your district user manager to gain access to “Web Applications”.*



2. Sign into web applications with your user name and password, then click “Login”. *Having trouble logging into your account? Please contact webappsloginassistance@dese.mo.gov or 573-522-3207.*

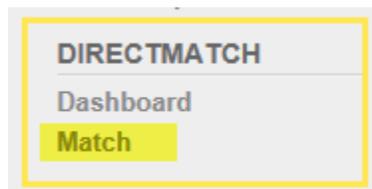


3. Depending on the level of access that the user has been granted, you will click on the link that is available to you.

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 left of the screen. You will see the DirectMatch section below. Select “Match” to start the direct certification matching process.



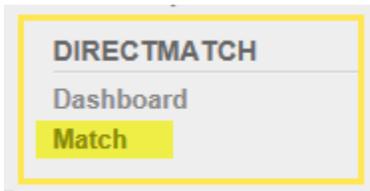
6. You will have the option to “Source” the MOSIS ID System, Upload a File, or Enter Online.

Step 2.1 Matching Option 1

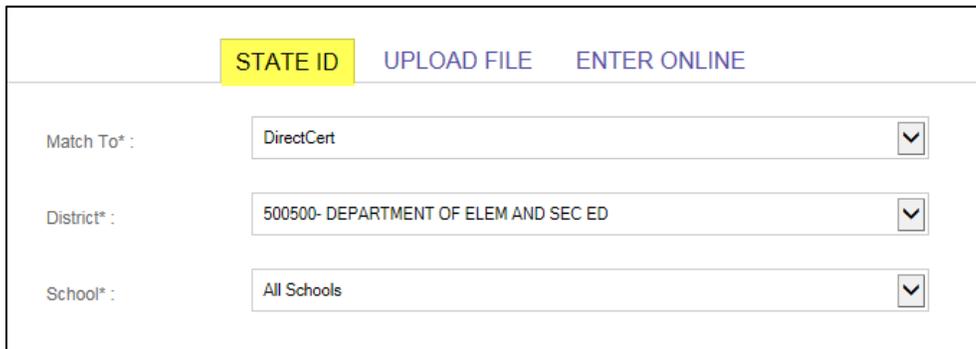
DirectMatch State ID Sourcing (recommended option)

DirectMatch State ID Sourcing uses the student data in the MOSIS ID Assignment system to match against the information provided by the Missouri Department of Social Services (DSS). *This option is only available to 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 “Direct Cert”
 - b. District: the system is defaulted to the User’s district
 - c. School: always “All Schools”



A screenshot of a web application form. The form has three tabs: 'STATE ID' (highlighted in yellow), 'UPLOAD FILE', and 'ENTER ONLINE'. Below the tabs are three dropdown menus:

- Match To*: DirectCert
- District*: 500500- DEPARTMENT OF ELEM AND SEC ED
- School*: All Schools

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 your internet browser’s “refresh button”  at the top of your screen 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 the “Step 3: Resolve Near Matches” procedure for further information in relation to resolving DirectMatch Near Matches.

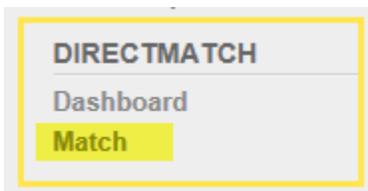
6. If there are no near matches, the file is ready to download. Please refer to the “Step 4: File Download” procedure for further information in relation to downloading the DirectMatch direct certification file.

Step 2.1 Matching Option 2

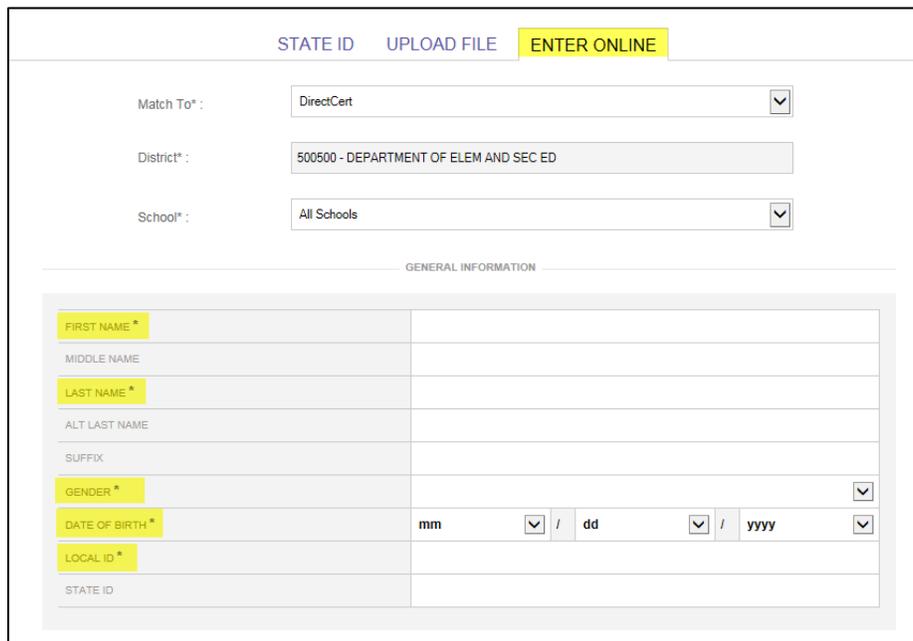
DirectMatch Enter Online

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 “Direct Cert”
 - 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 if available, please use.



STATE ID UPLOAD FILE **ENTER ONLINE**

Match To*: DirectCert

District*: 500500 - DEPARTMENT OF ELEM AND SEC ED

School*: All Schools

GENERAL INFORMATION

FIRST NAME *	
MIDDLE NAME	
LAST NAME *	
ALT LAST NAME	
SUFFIX	
GENDER *	
DATE OF BIRTH *	mm / dd / yyyy
LOCAL ID *	
STATE ID	

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

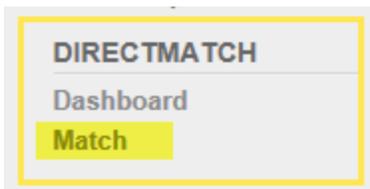
4. If there are no near matches, the file is ready to download. Please refer to the “Step 4: File Download” procedure for further information in relation to downloading the DirectMatch direct certification file.

Step 2.1: Matching Option 3

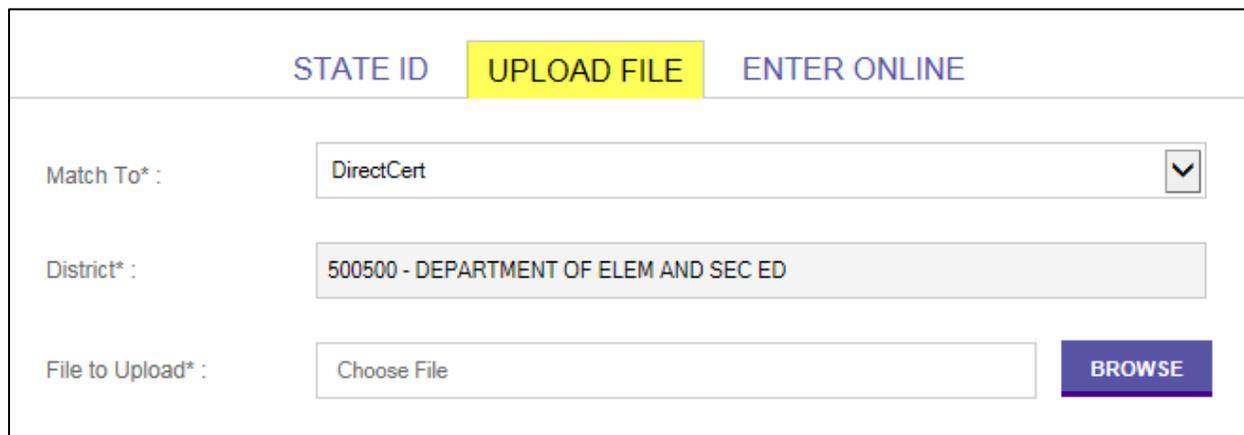
DirectMatch File Upload

This matching option requires a 3.0 version file layout. Please contact your SIS 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-2017-2018>. 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 “Direct Cert”
 - b. District: the system is defaulted to your district
 - c. File to Upload: Click “Browse” and select the file to upload



A screenshot of a web application form for uploading a file. The form has three tabs: 'STATE ID', 'UPLOAD FILE' (highlighted in yellow), and 'ENTER ONLINE'. Below the tabs are three input fields: 'Match To*' with a dropdown menu showing 'DirectCert', 'District*' with a text box containing '500500 - DEPARTMENT OF ELEM AND SEC ED', and 'File to Upload*' with a text box containing 'Choose File' and a 'BROWSE' 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 internet browser’s “refresh button”  at the top of your screen 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 the “Step 3: Resolve Near Matches” procedure 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 the “Step 4: File Download” procedure 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 the data validation. A 3.0 file layout template containing the required fields can be viewed via the link below.

<https://dese.mo.gov/data-system-management/core-datamosis/file-layouts-2017-2018>

Contact your Student Information System (SIS) vendor to determine if you have the correct file layout.

See the “Appendix II DirectMatch Troubleshooting Guide” 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.

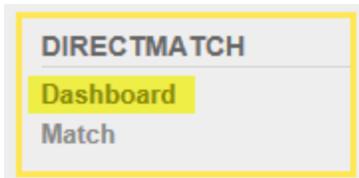
- **Required fields are not present:** All required fields must be included in the student record and in the correct format.
- **User is not authorized to submit person for the specified district:** DirectMatch is looking for the User’s “ResidentDistrictCode” and “CurrentDistrictCode”. If you are feeding 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
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  next to 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  button at the bottom of the page. Then click  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 are noted here. Please see the example file below.

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 2.

Step 3: Resolve Near Matches

DirectMatch Near Match Resolution

DirectMatch near matches occur when the student information located in the MOSIS ID Assignment system or batch file upload is compared to Missouri Department of Social Services (DSS) direct certification information and has a match probability less than what is required to be considered an exact match (less than a 94% match).

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 a near match. The highlighted fields shown in yellow on the comparison page 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.”

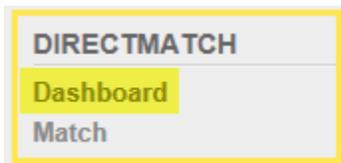
NO MATCH

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.



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

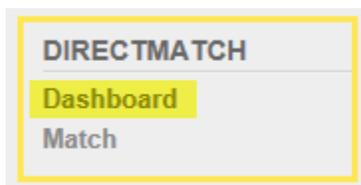
Note: A new DSS file is loaded to DirectMatch every Monday morning. Please resolve all Near Matches within the week.

Step 4: File Download

DirectMatch Certification 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 noted in the picture below:

(If there are no canceled records, the “Canceled” option is not 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.

- 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 in yellow below (*most vendor systems are coded with the default settings noted below and fields will not need to be selected*):

“Delimiter”: Tab or Comma

“Qualifier”: ” or ‘ (*or this field can be left blank*)

“Include Header/Footer”: Yes or No

All other fields are defaulted and require no action.

AVAILABLE OPTIONS TO DOWNLOAD

Batch Number:	670613
Template:	eScholar Uniq-ID® File Format 3.0+ ▼
Delimiter:	TAB ▼
Qualifier:	▼
Date Format:	mm/dd/yyyy ▼
Include Header/Footer:	<input type="radio"/> Yes <input checked="" type="radio"/> No

- 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.
- 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 copy and pasting the information into the template. The 3.0+ template can be viewed in the following link. <https://dese.mo.gov/data-system-management/core-datamosis/file-layouts-2017-2018>. 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 ninety-eight fields. The last twenty-seven fields of the file pertain to the student's direct certification information (highlighted in yellow). These fields are also described below.

```
DM Sample Export_Match Values - Notepad
File Edit Format View Help
ID,0000,500500,ROBIN,CHRISTOPHER,M,,M,07/21/2001,05,8888888888,,H,8888888888,500500,2018,,####,DirectCert,,,,,02,,,,,96,Match,,,1234,03/19/2018,CHRISTOPHER,ROBIN,M,07/21/2001,M,H,5678 RIVER ROAD,,SOMEWHERE,MO,65101,SMITH,ROBIN,####,Y,N,N,02/04/2018,SNAP
ID,0000,500500,JONES,JESSICA,J,,F,07/22/2001,05,1111111111,,W,1111111111,500500,2018,,####,DirectCert,,,,,02,,,,,96,Match,,,1234,03/19/2018,JESSICA,JONES,J,07/22/2001,F,W,1111 SAGE WAY,,SOMEWHERE,MO,63028,JUSTIN,JONES,####,Y,N,N,10/01/2017,SNAP
ID,0000,500500,SAWYER,TOM,T,,M,07/23/2001,05,2222222222,,H,2222222222,500500,2018,,####,DirectCert,,,,,02,,,,,96,Match,,,1234,03/19/2018,TOM,SAWYER,T,07/23/2001,M,H,1234 SMITH AVE,,SOMEWHERE,MO,65101,VALARIE,SAWYER,####,Y,N,N,02/04/2018,SNAP
ID,0000,500500,Smith,Stan,J,,M,01/01/2001,,1234123456,,W,1234123456,500500,2018,,DirectCert,,,,,02,,,,,No Match,,,7735,03/27/2018,No Match - No DM Index record available for extract
```

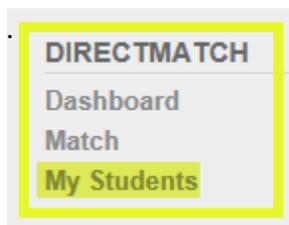
	DOWNLOAD FIELDS	MATCH RESULTS	FIELD DESCRIPTION	NO MATCH RESULTS
Match / No Match Information	Match Score	96	Match Score Percentage	N/A
	ID Record Status	MATCH	Match / No Match	No Match
	Location Status	N/A	N/A	N/A
	Event Status	N/A	N/A	N/A
	Record Reference Number	N/A	N/A	N/A
	Last Updated User ID	1234	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	Additional Information will not be provided for "No Matches"
	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 match within a specified school year.
3. Users can select the following filters to build the “My Students” report:

Filter Information:

- 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 and select which school you want to view. If you want to view students in “all buildings”, select “All School”.
- c. **Match Type:** “Match Type” will always be “DirectCert”
- d. **Status:** Users can select to view students with a “Match” or “No Match” status.
- e. **Group By: IMPORTANT!**
 - i. **Public LEAs:** Users should select “LOCAL ID / Source” in the “Group By” filter to ensure all students are represented. If a match file was uploaded or a student was entered online without a student State ID, the record would not appear if the “Group By” was filtered with “State ID”.
 - ii. **Non-Public LEAs:** Users must select “LOCAL ID / Source” in the “Group By” filter to ensure all students are represented.
- f. **ID:** This filter option allows users to search for a single student’s “match” and/or “no match” records.

Deleting Match Records

*(This option is only available to Public LEAs with MOSIS ID Assignment **and** DirectMatch access.)*

If a student is matched in error, the match record can be deleted.

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:

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

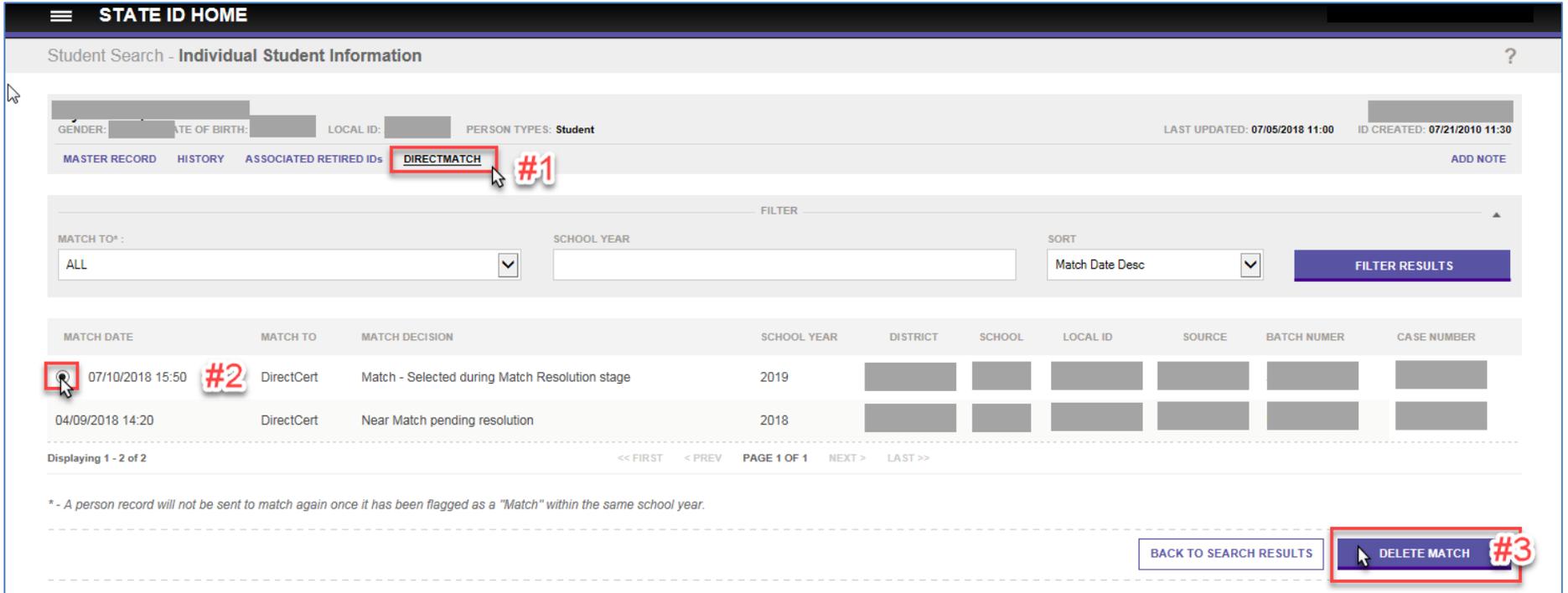


2. Search for the student in question using the Basic, Advanced, or ID search options.
3. Select the correct student from your district.
4. The webpage will default the to “Master Record” tab for the student. Select the “DirectMatch” tab to view the match / no match records for the student.
5. A listing 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  button to delete the match.

Please see the screen shot of the DirectMatch tab on the next page.

DirectMatch Tab Overview:

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



The screenshot shows the 'STATE ID HOME' interface. At the top, there is a navigation bar with 'STATE ID HOME' and a search icon. Below this is the 'Student Search - Individual Student Information' section. The student's information is partially redacted with grey boxes. The 'PERSON TYPES' are listed as 'Student'. There are tabs for 'MASTER RECORD', 'HISTORY', 'ASSOCIATED RETIRED IDs', and 'DIRECTMATCH'. The 'DIRECTMATCH' tab is highlighted with a red box and a '#1' callout. Below the tabs is a 'FILTER' section with dropdown menus for 'MATCH TO*' (set to 'ALL'), 'SCHOOL YEAR', and 'SORT' (set to 'Match Date Desc'). A 'FILTER RESULTS' button is present. Below the filter section is a table with the following columns: MATCH DATE, MATCH TO, MATCH DECISION, SCHOOL YEAR, DISTRICT, SCHOOL, LOCAL ID, SOURCE, BATCH NUMBER, and CASE NUMBER. The table contains two rows of match data. The first row has a match date of '07/10/2018 15:50', match to 'DirectCert', match decision 'Match - Selected during Match Resolution stage', and school year '2019'. This row is highlighted with a red box and a '#2' callout. The second row has a match date of '04/09/2018 14:20', match to 'DirectCert', match decision 'Near Match pending resolution', and school year '2018'. Below the table is a pagination bar showing 'Displaying 1 - 2 of 2' and navigation buttons. At the bottom right, there are two buttons: 'BACK TO SEARCH RESULTS' and 'DELETE MATCH'. The 'DELETE MATCH' button is highlighted with a red box and a '#3' callout. A note at the bottom states: '* - A person record will not be sent to match again once it has been flagged as a "Match" within the same school year.'

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 Instructions

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 the link below.

<https://dese.mo.gov/data-system-management/core-datamosis/file-layouts-2017-2018>

Data Requirements

The DirectMatch system requires 78 field positions to be included in the 3.0 DirectMatch file layout. The Missouri Department of Elementary and Secondary Education (DESE) only requires 17 of the 78 fields to be populated with information.

The required fields that are noted below and are also 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 sixteen 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. An example of both can be found below.

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 viewed at the link below.
<https://dese.mo.gov/data-system-management/core-datamosis/file-layouts-2017-2018>
2. Copy and Paste the required student information in the excel spreadsheet.
3. Ensure all fields are formatted correctly.
 - a. Resident District and Current District Code should include a leading zero in the file if applicable. Example: 001001 (columns B & O)
 - b. Grades 01-09 should contain the leading zero in the file (column J)
 - c. The Submission Purpose and Person Type should include a leading zero.
4. Update the “Header” Record 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 rows in the template (Including the “Header” and “Trailer” records)
7. Save the template as “Text (tab delimited)”
8. Upload your file using the “File Upload” matching Option 3

Appendix II

DirectMatch Troubleshooting Guide

DirectMatch Access

1. “I do not see the DirectMatch link 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 application listing.

Non-Public LEAs 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

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. For questions, please contact the DESE User Manager group at the following address. 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 old “Direct Cert Lookup” file will not work in the DirectMatch module.

2. Batch Status: Batch does not contain and 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 mysteriously disappeared before I could resolve them.

The DSS file is uploaded to DirectMatch weekly (Monday morning). 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 on the recommended process for excluding these students from the export file.

Training Information

1. DirectMatch training information can be found in the link below:

<https://dese.mo.gov/data-system-management/core-datamosis/training>

2. If you would like to be notified via email in relation to upcoming trainings, webinars, and system notifications, please ensure you are signed up for the MOSIS Listserv. The link to the subscription page can be found below.

<http://lists.mo.gov/mailman/listinfo/mosis>

3. If you are subscribed to the MOSIS Listserv, but are not receiving notification, please check your SPAM / junk file to ensure that you are receiving these emails. The sender for these emails is “DESE-MOSIS”.

Template Information

1. Direct Certification / DirectMatch Templates can be found at the link below:

<https://dese.mo.gov/data-system-management/core-datamosis/file-layouts-2017-2018>

“My Students” Report

1. “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

1. “I have a student that was matched in error.”
 - a. A student’s match record can be deleted by following the steps listed in the “Deleting Match Records” section of this manual.