



# PAsecureID

## Introduction to the Redesigned User Interface

eScholar Uniq-ID® v9

POWERED BY



Participants will be able to use the redesigned user interface for PAsecureID (eScholar Uniq-ID® v9) to:

- Upload a file of student records to PAsecureID.
- Resolve near matches.
- Download a file of student records, including new IDs, from PAsecureID.
- Access files with file and data validation errors.
- Search for students.



- PAsecureID Assignment Process
- Near Match Resolution Process
- Viewing File and Data Validation Errors
- Searching for Students

# Overview of PAsecureID Assignment Process

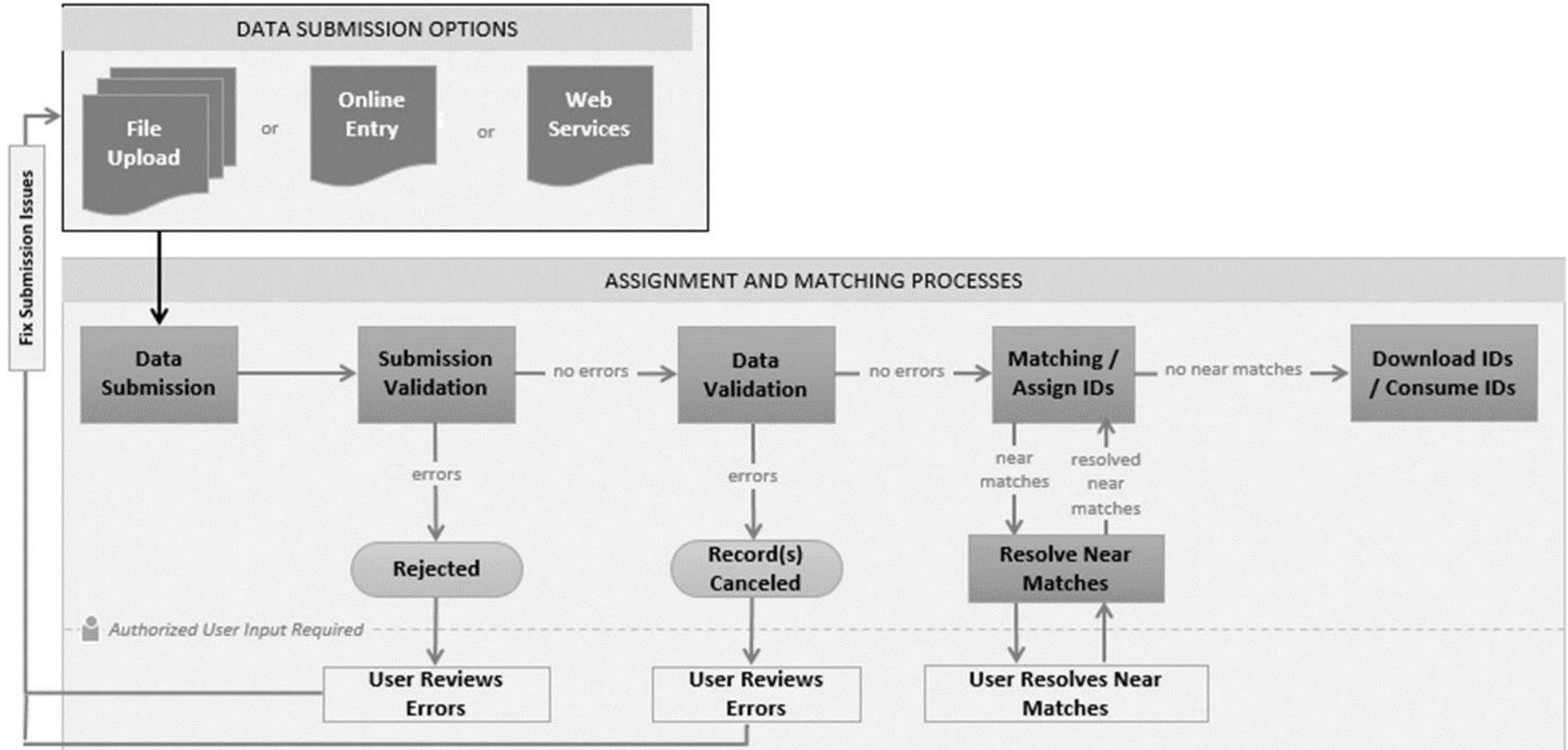
# What Does PAsecureID do?



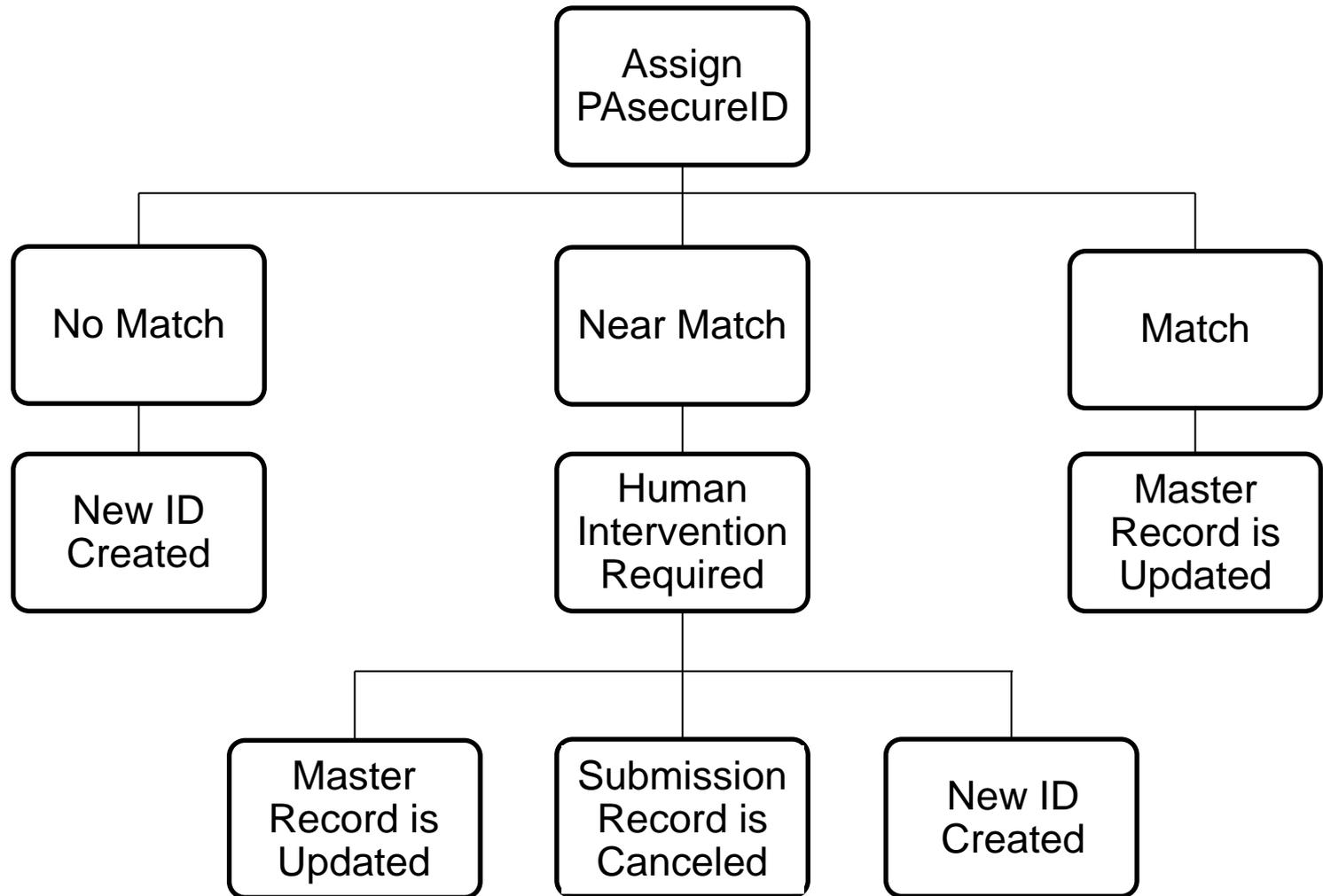
- Creates and assigns new IDs for students who do not have one.
- Finds an existing ID for students who already have one.
- “Assigns” a new or existing ID to a student record in an output file, so it can be consumed by other systems.

- **Master Record** – The current active record in the repository which is used for matching.
- **Submission Record or Input Record** – A record submitted to be matched against the master records.
- **Batch** – A group of submission records submitted to the system at the same time which are stored as unique entries and can be referred back to by batch number. A batch can consist of a single submission record or many submission records.
- **PAsecureID** – The state ID that is assigned.
- **Match Threshold** – Values set by the system administrator that determines the Match, Near Match and No Match scores.

# ID Assignment Process: Overview



# Assign PAsecureID: Possible Outcomes





# ID Assignment Process

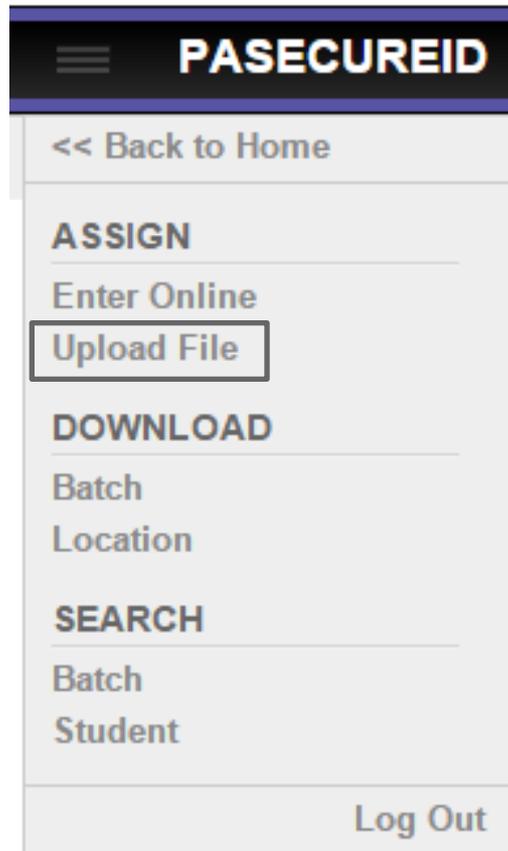
## Locate Drop Down Menu

- Use the menu icon to locate the drop down menu.



# Upload Batch File

- Select Upload File from the menu.



# Basic and Advanced Upload



☰ PASECUREID

Upload file

BASIC ADVANCED

File to Upload \*:

- Two types of batch uploads: Basic and Advanced.
- Basic Upload requires a header and trailer record.
- Advanced Upload requires user to specify the file parameters prior to upload, including:
  - Delimiter
  - Template
  - Qualifier
  - Source system

# Upload A File

☰ **PASECUREID** ExampleUser, PDE

Upload file ?

BASIC    ADVANCED

File to Upload \*:



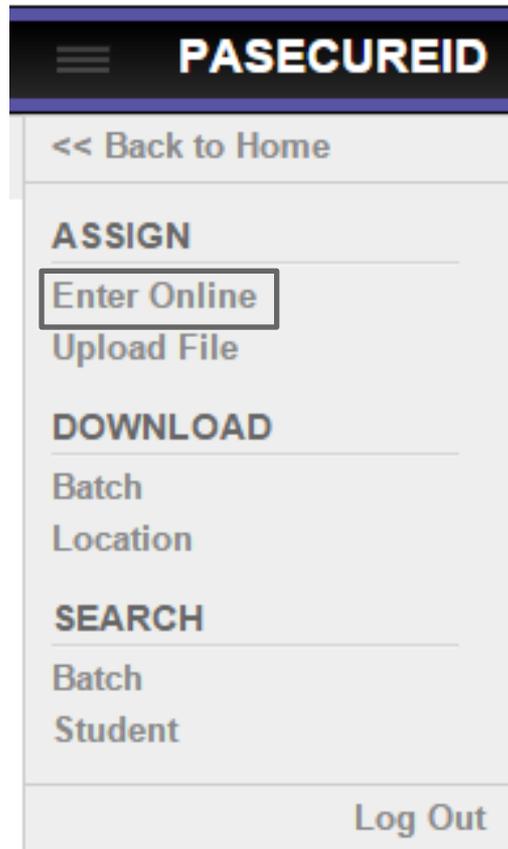
(\*) Required

- Use browse button to navigate to the desired file to be uploaded.
- Click Upload.
- Basic Upload requires a header and trailer record in the uploaded file.

# Submit A Single Entry: Enter Online



- To submit a single person use the Enter Online option.



# Enter Student Information



- Enter information and click: Assign PAsecureID button.

**PAsecureID** ExampleUser, PDE

Enter Online - **Data Entry** ?

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GENERAL INFORMATION

FIRST NAME *			
MIDDLE NAME			
LAST NAME *			
SUFFIX			
GENDER *	▼		
DATE OF BIRTH*	mm ▼	/	dd ▼ / yyyy ▼
ETHNICITY/RACE	▼		
SSN	-	-	
PAsecureID			

ENROLLMENT INFORMATION

GRADE: *	▼		
SCHOOL: *			
DISTRICT *			
RES DISTRICT *			
SCHOOL YEAR *			
LOCAL ID *			

(\*) Required

# Data Validation



Upload File - **Validate Data** - Batch 150

UPLOAD DATE	BATCH INFO	STATUS	NUMBER OF RECORDS	NEXT ACTION
04/14/2015 17:57	150	Data Validation is in progress.	In Progress	<a href="#">BACK TO HOME</a>

- Batch passed file validation and has been assigned an individual Batch ID.
- The file proceeds automatically to data validation if the file successfully passed file validation.
- Status indicates that data validation is in progress.
- PAsecureID screens do not refresh automatically; returning to the home page, using the Back to Home button, will update the status.

# Access Batch Information



- Detailed batch information is accessed by drilling into the batch number in the batch info column on any screen.

**PASECUREID** JohnSmith, Acadia Parish

Home ?

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FILTER

LEA CODE:  SCHOOL/SITE CODE:  BATCH NUMBER:

SUBMISSION TYPE:  PROCESSING STAGE:  FROM:  TO:  SORT:

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	LEA CODE	SCHOOL/SITE CODE	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
04/14/2015 16:44	File	<b>202</b>	001	LEA	SIS	Data Validation Complete. Ready to Assign Uniq IDs	1 of 1	<input type="button" value="ASSIGN PASECUREID"/>

- The Batch Information provides additional information about the batch:
  - Batch statistics
  - Processing information
  - Download information
  - General information about the batch

Batch Information: **Batch 202**

STATISTICS   PROCESSING   DOWNLOADS   GENERAL

**READY TO ASSIGN IDS**

Ready to Assign IDs	1
---------------------	---

CLOSE WINDOW

# Assign PAsecureID

- The status indicates that data validation is complete.
- The next action is Assign PAsecureID.
- Click on the Assign PAsecureID button.

PAsecureID JohnSmith, Acadia Parish

Home ?

FILTER

LEA CODE:  SCHOOL/SITE CODE:  BATCH NUMBER:

SUBMISSION TYPE:  PROCESSING STAGE:  FROM:  TO:  SORT:  FILTER RESULTS

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	LEA CODE	SCHOOL/SITE CODE	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
04/14/2015 16:44	File	202	001	LEA	SIS	Data Validation Complete. Ready to Assign Uniq IDs	1 of 1	ASSIGN PASECUREID



# ID Assignment in Progress



- System indicates that ID Assignment is in progress.

PASECUREID <span style="float: right;">John Smith, Acadia Parish</span>				
Upload File - Assign IDs - Batch 198				
UPLOAD DATE	BATCH INFO	STATUS	NUMBER OF RECORDS	NEXT ACTION
04/14/2015 15:50	198	ID Assignment is in progress.	In Progress	<a href="#">BACK TO HOME</a>

# Download PAsecureID

- The status is ID(s) Assigned, which means the process is complete.
- The next action is Download PAsecureID.
- Click the Download PAsecureID button.

**PAsecureID** John Smith, Acadia Parish

Home ?

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FILTER

LEA CODE:  SCHOOL/SITE CODE:  BATCH NUMBER:

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

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	LEA CODE	SCHOOL/SITE CODE	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
04/14/2015 15:58	File	199	001	LEA	SIS	ID(s) Assigned.	1 of 1	<a href="#">DOWNLOAD PASECUREID</a>

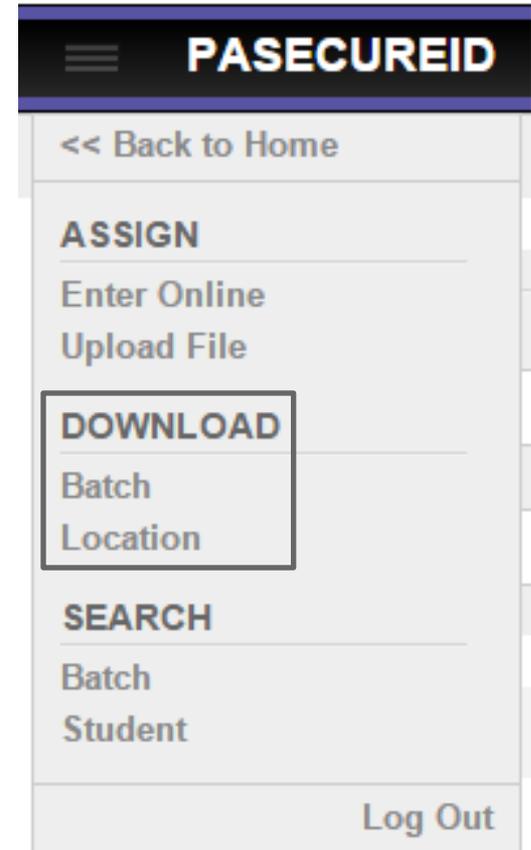


# Download File

- User can extract records from this batch with the download button.

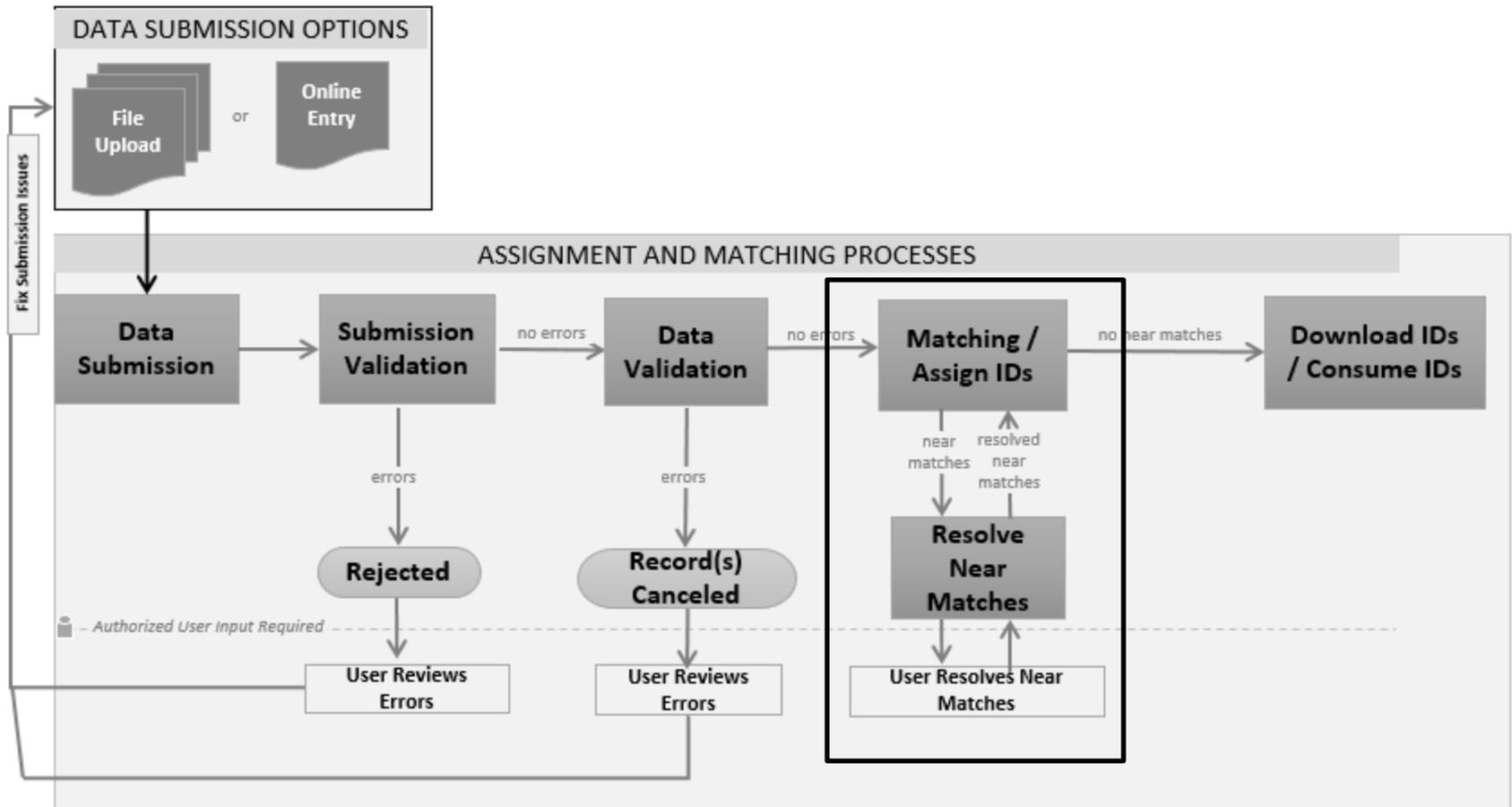
PASECUREID <span style="float: right;">JohnSmith, Acadia Parish</span>				
Download ID - Batch 199				
UPLOAD DATE	BATCH INFO	STATUS	RECORD COUNT	NEXT ACTION
04/14/2015 15:58	199	File Extract Complete.	1	<a href="#">DOWNLOAD</a>

- Download by Batch
  - From the menu, select Download, then Batch.
  - Records retrieved by Download by Batch will return all of the student records with IDs that were assigned in a given batch.
- Download by Location
  - From the menu, select Download, then Location.
  - Records can be downloaded by location/agency for students who are currently enrolled.



# Near Match Resolution Process

# ID Assignment Process



# Resolve Near Matches



PASECUREID

JohnSmith, Acadia Parish

Home

FILTER

LEA CODE:

SCHOOL/SITE CODE:

BATCH NUMBER:

SUBMISSION TYPE:

PROCESSING STAGE:

FROM:

TO:

SORT:

[FILTER RESULTS](#)

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	LEA CODE	SCHOOL/SITE CODE	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
04/07/2015 11:39	File	55	001	LEA	SIS	Near Matches / Duplicates Found	3 of 4	<a href="#">RESOLVE NEAR MATCHES</a>

- The status of Batch 55 indicates there are near matches/duplicates found.
- The next action is Resolve Near Matches.
- Human intervention is required for Near Match resolution.

# List of Near Matches

- There are three instances of a Near Match from this batch.
- Review and Select allows users to drill down into the comparison details for each near match.

**PASECUREID** JohnSmith, Acadia Parish

Near Match - Batch 55 ?

FILTER

LAST NAME  FILTER RESULTS

Select All On Page

LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	LEA CODE	SCHOOL/SITE CODE	RESIDING PARISH CODE	LOCAL ID	NEXT ACTION
<input type="checkbox"/> Agile	Sophia	A			05/10/2002	FEMALE	001	001001		798575	<input type="button" value="REVIEW AND SELECT"/>
<input type="checkbox"/> Johnson	Jacob	Michael			11/02/2005	FEMALE	001	001014		23413241	<input type="button" value="REVIEW AND SELECT"/>
<input type="checkbox"/> Johnson	John	M			05/05/2006	MALE	001	001014		847575	<input type="button" value="REVIEW AND SELECT"/>

Displaying 1 - 3 of 3 << FIRST < PREV PAGE 1 OF 1 NEXT > LAST >>

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# Initial Near Match Comparison



Resolve Near Matches / Duplicates - Batch 55 ?

STUDENT RECORD TO REVIEW AND SELECT

LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	LEA CODE	SCHOOL/SITE CODE	LOCAL ID
Agile	Sophia	A			05/10/2002	FEMALE	001	001001	798575

NEAR MATCHES / DUPLICATES FOUND

	LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	LEA CODE	SCHOOL/SITE CODE	LOCAL ID	MATCH PROBABILITY
<input checked="" type="radio"/>	Agile	Sophie	Ann			05/10/2002	FEMALE	001	001001	798575	91 [NEAR MATCH]

- Student Record to Review and the Near Match Found are displayed.
- Actions are: Assign Selected, Create New ID, Cancel Record or Select Another Record.
- Student Record name is a drill down to the detailed comparison screen.

# Compare Student Information



☰ PASECUREID

Near Match - Compare - Batch 55

91

MATCH SCORE

Sophia A Agile (SUBMISSION)

GENDER: FEMALE    DATE OF BIRTH: 05/10/2002    LOCAL ID: 798575    SSN: Not Present

vs

Sophie Ann Agile (#2769125311)

GENDER: FEMALE    DATE OF BIRTH: 05/10/2002    LOCAL ID: 798575    SSN: Not Present

## COMPARE RECORDS

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

FIELDS	SUBMISSION RECORD	MASTER RECORD (STATE ID: 2769125311)
FIRST NAME	Sophia	Sophie
LAST NAME	Agile	Agile
MIDDLE NAME	A	Ann

- The match score and the primary student information from both the master record and the submission record are displayed side by side.

# Compare Student Information



- In side-by-side comparison, fields that differ between submission record and master record are highlighted in yellow.

## COMPARE RECORDS

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

FIELDS	SUBMISSION RECORD	MASTER RECORD (PASECUREID: 123456XXXX)	ADD NOTE
FIRST NAME	Test	Test	
LAST NAME	Student	Student	
MIDDLE NAME	Z	T	
SUFFIX			
DATE OF BIRTH	01/18/2007	01/17/2007	
GENDER	MALE	MALE	
SSN	Not Present	Not Present	
RACE/ETHNICITY	White (Non-Hispanic)	White (Non-Hispanic)	
DISTRICT	123456789 Example SD	123456789 Example SD	
SCHOOL	1234 Example SHS	4321 Example El Sch	
RES DISTRICT	123456789	123456789	
GRADE	Grade 1	Early Childhood	
SCHOOL YEAR	2014	2014	
LOCAL ID	123456	123456	
PASECUREID		123456XXXX	
ALTERNATE ID			
SERIAL #	6625517	6625516	
CREATED	02/03/2015	02/03/2015	
LAST UPDATED	02/03/2015	02/03/2015	
COMMENTS	123456XXXX;		
MATCH NOTES			

# Make a Match Decision



CREATED	02/03/2015	02/03/2015
LAST UPDATED	02/03/2015	02/03/2015
COMMENTS	123456XXXX;	
MATCH NOTES		

RETURN TO LIST

CANCEL SUBMISSION

CREATE NEW ID

ASSIGN SELECTED

- Decide whether or not these two records are a match.
- If no match, then Create New ID.
- If match, then Assign Selected.
- Can also cancel submission or return to list of near matches.

# Match Decision: Assign Selected



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JohnSmith, Acadia Parish

Resolve Near Matches / Duplicates - **Batch 55**



ID successfully assigned - A match was found.[ State ID: 276-912-5311 ]

STUDENT RECORD RESOLVED

LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	LEA CODE	SCHOOL/SITE CODE	LOCAL ID	STATE ID
Agile	Sophia	A			05/10/2002	FEMALE	001	001001	798575	2769125311

[SELECT ANOTHER RECORD](#)

- PAsecureID from the master record has been assigned to the submission record.
- Select another record to continue resolving near matches.

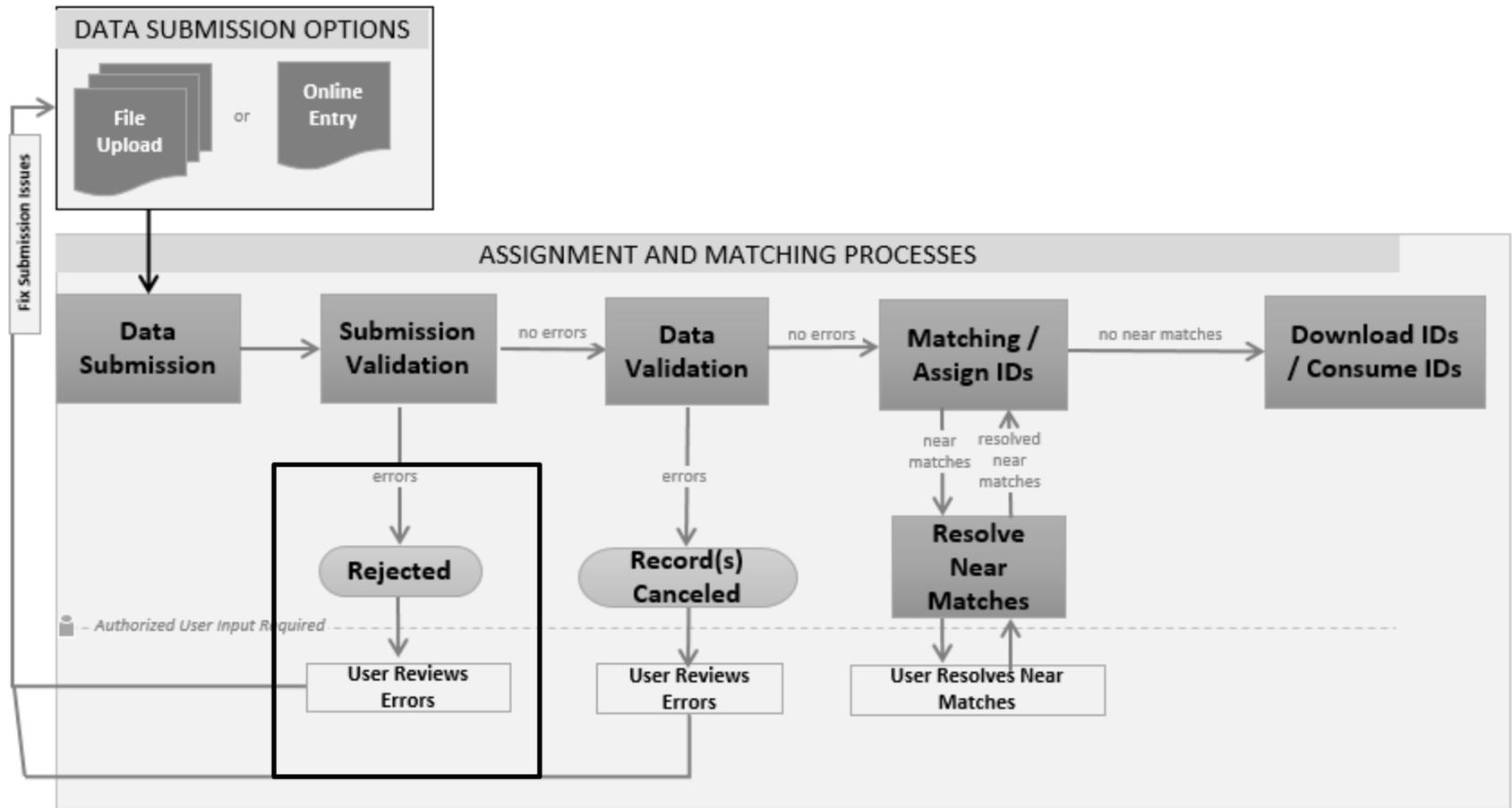
# ID Successfully Assigned

PASECUREID				JohnSmith, Acadia Parish
Resolve Near Matches / Duplicates - Batch 55				?
UPLOAD DATE	BATCH INFO	STATUS	NUMBER OF RECORDS	NEXT ACTION
04/07/2015 11:39	55	ID(s) Assigned.	4	<a href="#">DOWNLOAD UNIQU ID</a>

- After all near matches in a batch have been resolved then the batch moves automatically to assign PAsecureIDs.
- The status indicates that all IDs have been assigned and are ready to be downloaded.
- All the near matches in a batch must be resolved or canceled before the batch moves automatically to assign PAsecureIDs.

# Viewing File and Data Validation Errors

# File Validation Errors



# File Failed Upload Message

Upload file



**Batch Error Information** - File upload failed. Fix the errors below and resubmit new file.

*\*The file you attempted to upload has been saved to the database and can be downloaded using the Extract & Download Batch feature. The batch number assigned to this file is 92219*

## ERRORS TO FIX (2) [HIDE ALL](#)

The record count in the trailer record of the uploaded file is incorrect. The record count must equal the total number of records in the file, including the header and trailer.

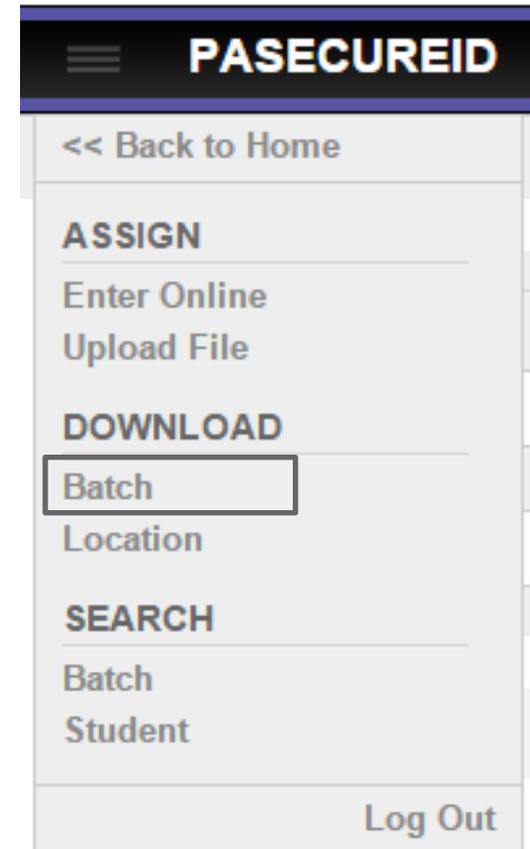
School Code is not valid for the specified district on 1 line(s):3

UPLOAD NEW FILE

- The status indicates the file failed to upload because the record count in the uploaded file is incorrect.
- The status also indicates that the rejected file can be downloaded under the Extract & Download Batch feature.

# Download Batch

- To access the rejected file select the Batch link under the Download section of the menu.



# Extract and Download Batch

☰ PASECUREID

Extract and Download Batch

FILTER

LEA CODE

SCHOOL/SITE CODE

SUBMISSION TYPE

EXTRACT TYPE   
IDs Assigned  
Errors to Fix  
Near Matches  
Canceled  
Rejected  
Fixed Records  
Near Match Details

FROM

TO

SORT

UPLOAD DATE	LEA CODE	SCHOOL/SITE CODE	STATUS	RECORD COUNT	NEXT ACTION
04/07/2015 15:34	61	LEA	Rejected.	0	EXTR
04/07/2015 15:32	60	001 LEA	Rejected.	0	EXTR

- Filter by extract type.
- Rejected-Files rejected by the system due to file validation errors.
- Canceled-Records auto canceled by the system due to data validations errors.

# Extract Type Filter Example: Rejected

**PASECUREID** JohnSmith, Acadia Parish

Extract and Download Batch ?

FILTER

LEA CODE

SCHOOL/SITE CODE

SUBMISSION TYPE

**EXTRACT TYPE**

FROM

TO

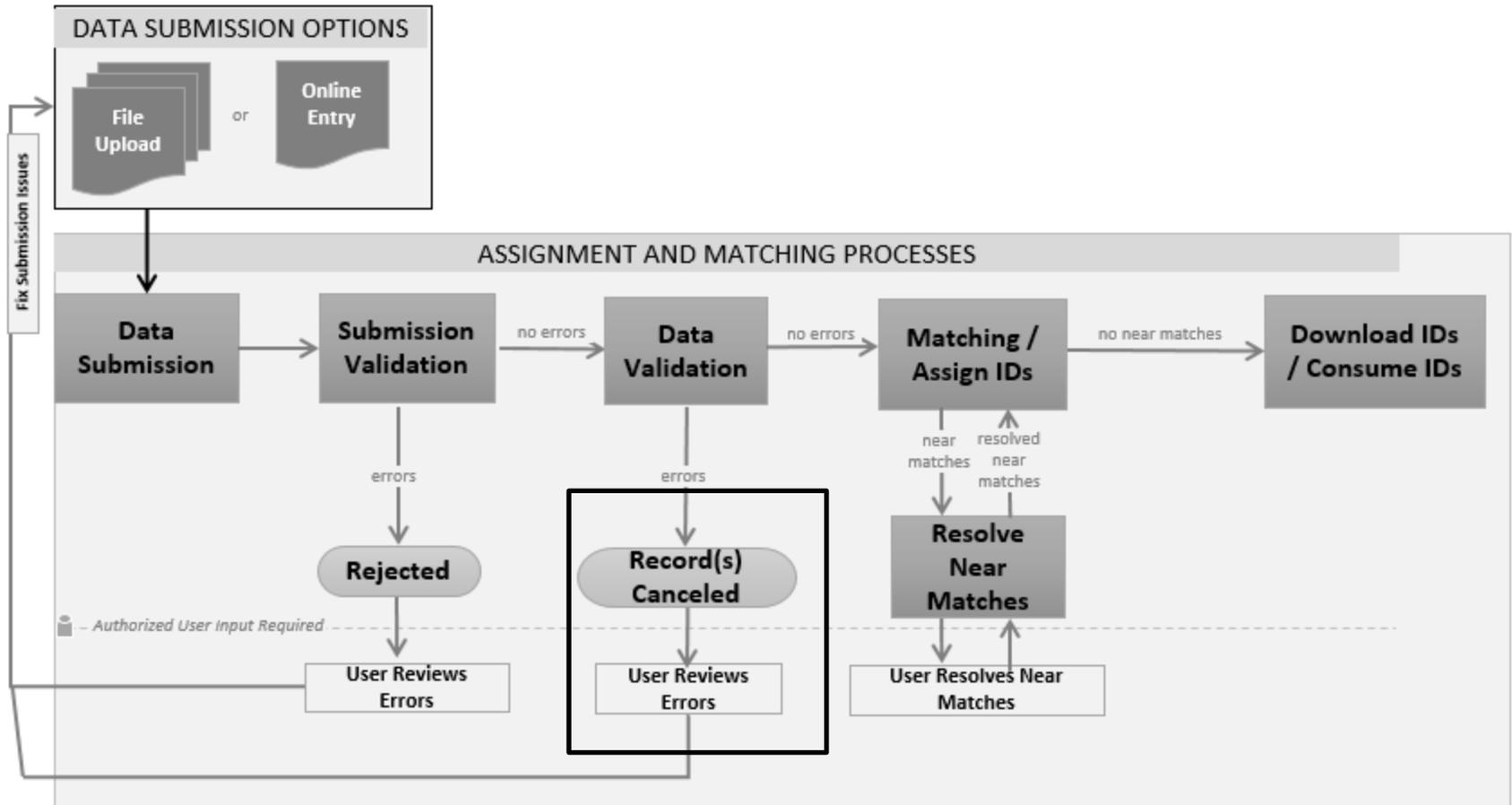
SORT

**FILTER RESULTS**

UPLOAD DATE	BATCH INFO	LEA CODE	SCHOOL/SITE CODE	STATUS	RECORD COUNT	NEXT ACTION
04/07/2015 15:34	61	001	LEA	Rejected.	0	<a href="#">EXTRACT RECORDS</a> <a href="#">ADD TO DOWNLOAD CART</a>
04/07/2015 15:32	60	001	LEA	Rejected.	0	<a href="#">EXTRACT RECORDS</a> <a href="#">ADD TO DOWNLOAD CART</a>

- Under the Extract Type filter, select Rejected.
- This returns all the batches that failed file validation.
- Click the Extract Records button to extract and then download the rejected batch.
- Fix any errors and resubmit the file.

# Data Validation Errors



# Status: Data Validation Incomplete



**PASECUREID** ExampleUser, PDE

Home ?

FILTER

DISTRICT:	SCHOOL	BATCH NUMBER		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
SUBMISSION TYPE	PROCESSING STAGE	FROM	TO	SORT
All	All	01/13/2016	02/12/2016	Upload Date Desc

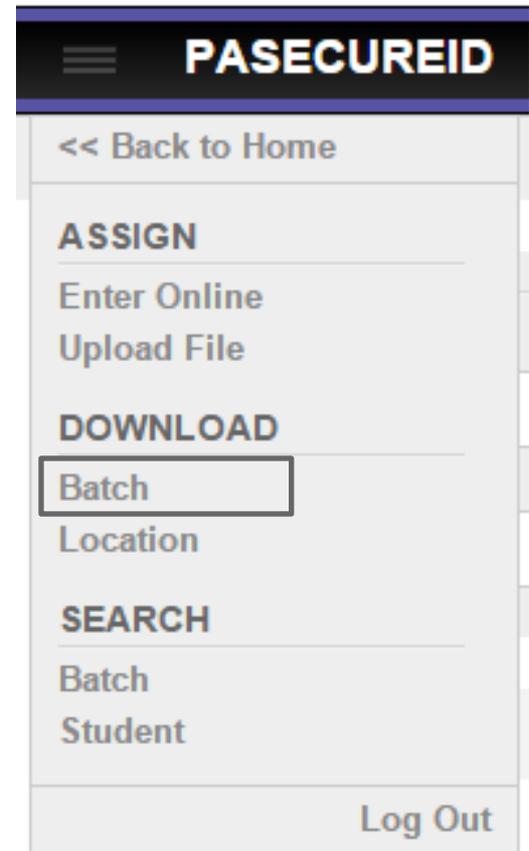
**FILTER RESULTS**

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
02/12/2016 13:52	File	92218	123456789	0000	Default	Data Validation Incomplete. Fix Data Errors	2 of 411	<b>FIX ERRORS</b>

- Status indicates that data validation is incomplete due to data errors.
- The Next Action is highlighted. Selecting the Fix Errors button will present you with data errors that need corrected.
- This batch can also be downloaded from Download Batch so that you can see the errors and determine what needs to be fixed.

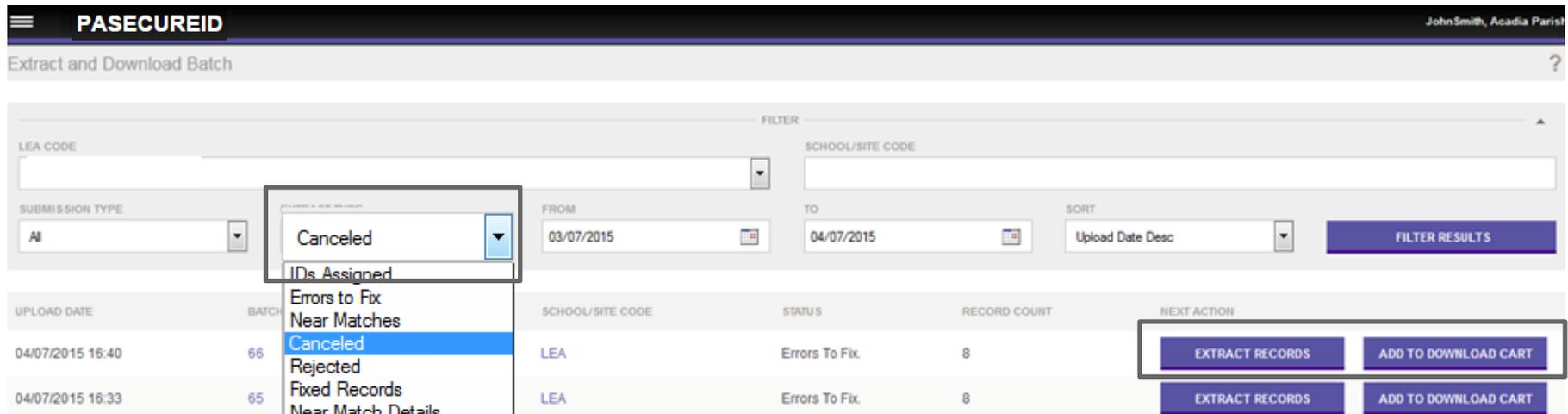
# Download Batch

- Select the Batch link under the menu.



# Downloading Files with Errors

- Batches that failed data validation may be downloaded with the filter types:
  - Canceled
  - Errors to Fix
- Under the Extract Type filter, select Canceled or Errors to Fix.
- Extract the records and download.
- Add to download cart if there is more than one batch to fix.



The screenshot shows the PASECUREID web application interface. At the top, there is a navigation bar with the PASECUREID logo and the user name "John Smith, Acadia Parish". Below the navigation bar, there is a header "Extract and Download Batch" with a help icon. The main content area is divided into a filter section and a table section.

The filter section includes the following fields:

- LEA CODE: [Text input field]
- SUBMISSION TYPE: [Dropdown menu with "All" selected]
- FROM: [Date picker with "03/07/2015" selected]
- TO: [Date picker with "04/07/2015" selected]
- SCHOOL/SITE CODE: [Text input field]
- SORT: [Dropdown menu with "Upload Date Desc" selected]
- FILTER RESULTS: [Purple button]

The table section displays the following data:

UPLOAD DATE	BATCH	SCHOOL/SITE CODE	STATUS	RECORD COUNT	NEXT ACTION
04/07/2015 16:40	66	LEA	Errors To Fix	8	<a href="#">EXTRACT RECORDS</a> <a href="#">ADD TO DOWNLOAD CART</a>
04/07/2015 16:33	65	LEA	Errors To Fix	8	<a href="#">EXTRACT RECORDS</a> <a href="#">ADD TO DOWNLOAD CART</a>

A dropdown menu is open over the SUBMISSION TYPE field, showing the following options:

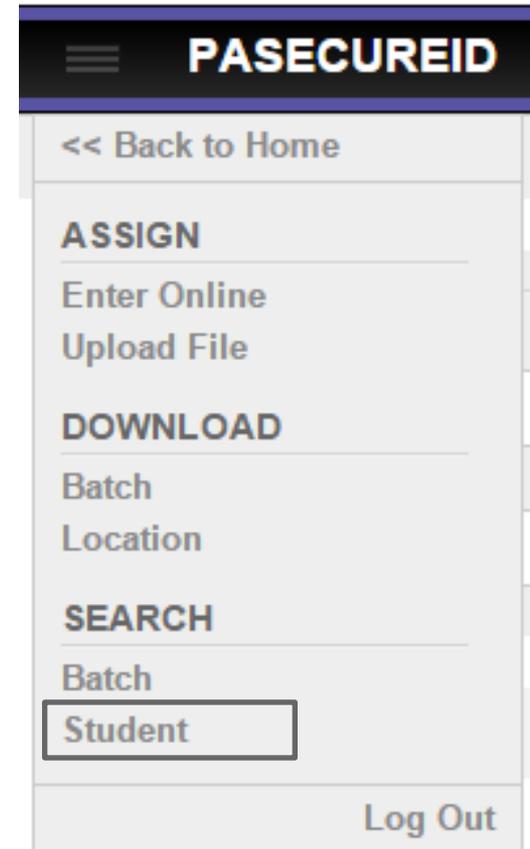
- Canceled
- IDs Assigned
- Errors to Fix
- Near Matches
- Canceled
- Rejected
- Fixed Records
- Near Match Details



# Searching for Students

# Search by Student

- Choose search by student from the drop down menu.



# Student Search Overview



- Student search allows users to search the master repository using demographic information.

**PASECUREID** ExampleUser, PDE

Student Search - Individual Student ?

BASIC SEARCH   ADVANCED SEARCH   ID SEARCH

First Name:\*

Middle Name:

Last Name:\*

Suffix:

Date Of Birth:  /  /

Search History

(\*) Required

# Basic Student Search



- First and last name are required at a minimum.
- Adding additional data elements improves the search results.

**PASECUREID** ExampleUser, PDE

Student Search - Individual Student ?

BASIC SEARCH   ADVANCED SEARCH   ID SEARCH

First Name:\*

Middle Name:

Last Name:\*

Suffix:

Date Of Birth:  /  /

Search History

(\*) Required

# Student Search Results



- The system returns potential matches according to the search parameters.
- Each record is returned with a match probability score.
- Names link to the detailed person records.

SEARCH RESULTS

STATE ID	LAST NAME	FIRST NAME	MIDDLE NAME	SUFFIX	DATE OF BIRTH	GENDER	LEA CODE	SCHOOL/SITE CODE	ETHNICITY INDICATOR	RACE(S)	SSN	MATCH PROBABILITY
482-954-1863	<a href="#">Adams</a>	<a href="#">Michelle</a>	Ann		03/15/2001	FEMALE	001	001001		Non-Hispanic (HI7), Black (BL7)	Not Present	77
351-382-5143	<a href="#">Adams</a>	<a href="#">Ann</a>	M		03/15/2000	FEMALE	001	001001		Non-Hispanic (HI7), Black (BL7)	Not Present	73



# ID Search

- The ID Search allows the user to search for a person by PAsecureID or Alias ID.
- The user may also search for a record by any ID associated with the master record from a specific source system.

**PAsecureID** ExampleUser, PDE

Student Search - Individual Student ?

BASIC SEARCH   ADVANCED SEARCH   **ID SEARCH**

ID:\*

ID Type:\*  PAsecureID    Alias ID

Source:

(\*) Required

For more information on PAsecureID, please visit PDE's website at [www.education.pa.gov](http://www.education.pa.gov)

*The mission of the department is to academically prepare children and adults to succeed as productive citizens. The department seeks to ensure that the technical support, resources and opportunities are in place for all students, whether children or adults, to receive a high quality education.*