



Resolving Near Matches

Near matches are caused when data entered during the creation of a PAsecureID closely approximates data in an existing record, and indicates possible duplicate records. Indication of a near match should be researched in order to avoid duplication of records for a student who may already be in the system.

If a near match proves that a student already exists in PAsecureID, do not create a new record; use the active (existing) ID.

Step 1: Examine each possible near match

The screenshot shows the PAsecureID search interface. At the top, there are filter fields for LEA CODE, SCHOOL/SITE CODE, and BATCH NUMBER. Below these are fields for SUBMISSION TYPE (set to 'All'), PROCESSING STAGE (set to 'All'), and date ranges (FROM: 03/07/2015, TO: 04/07/2015). A 'FILTER RESULTS' button is present. The results table below has columns: UPLOAD DATE, SUBMISSION TYPE, BATCH B#/O, LEA CODE, SCHOOL/SITE CODE, SOURCE SYSTEM, STATUS, RECORD COUNT, and NEXT ACTION. The 'STATUS' column for the first row is highlighted with a box and contains the text 'Near Matches / Duplicates Found'. The 'NEXT ACTION' column for the same row has a button labeled 'RESOLVE NEAR MATCHES'.

- The status of Batch 55(shown above) indicates there are near matches/duplicates found.
- The next action is “Resolve Near Matches.”

The screenshot shows a detailed view of near matches for Batch 55. It features a search filter for 'LAST NAME' and a 'FILTER RESULTS' button. Below the filter is a 'Select All On Page' checkbox. The main area contains a table with columns: LAST NAME, FIRST NAME, MIDDLE NAME, ALT LAST NAME, SUFFIX, DATE OF BIRTH, GENDER, LEA CODE, SCHOOL/SITE CODE, RESIDING PARISH CODE, LOCAL ID, and NEXT ACTION. Three rows of student data are shown, each with a 'REVIEW AND SELECT' button in the 'NEXT ACTION' column. The first row is for 'Agle, Sophia A', the second for 'Johnson, Jacob Michael', and the third for 'Johnson, John M'. At the bottom, there are two buttons: 'CANCEL ALL NEAR MATCH RECORDS FOR THIS BATCH' and 'CANCEL ALL CHECKED RECORDS'.

- 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.



Step 2: Compare student information

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 |
|-----------|------------|-------------|---------------|--------|---------------|--------|----------|------------------|----------|-------------------|
| Agile | Sophia | Ann | | | 05/10/2002 | FEMALE | 001 | 001001 | 798575 | 91 [NEAR MATCH] |

CANCEL RECORD SELECT ANOTHER RECORD CREATE NEW ID ASSIGN SELECTED

- “Student Record to Review” and the “Near Match Found” are displayed.
- “Student Record Name” is a drill down to the detailed comparison screen.

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 |

**Fictitious Student Information used in this example.*

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

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 | |

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



Step 3: Make a match decision

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

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

PAsecureID John Smith, Acadia Parish

Resolve Near Matches / Duplicates - Batch 65 ?

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 |

- If the “Assign Selected” option is chosen during the near match resolution process, then the input record is matched to the master record and the PAsecureID from the master record is assigned to the submission record.
- Select another record to continue resolving near matches.

Frequently Asked Questions

Q. Why do I receive a near match for a record with 100 percent match probability?

A. If more than one record is above the lower near match probability threshold you will end up with a near match.

Example:

| STUDENT RECORD TO REVIEW AND SELECT | | | | | | | | | | |
|-------------------------------------|------------|-------------|--------|---------------|--------|-----------|--------|-----------|-------------------|--|
| LAST NAME | FIRST NAME | MIDDLE NAME | SUFFIX | DATE OF BIRTH | GENDER | DISTRICT | SCHOOL | LOCAL ID | | |
| Konyar | Melissa | | | 11/15/2010 | FEMALE | 347228932 | 9999 | 55555555 | | |
| NEAR MATCHES / DUPLICATES FOUND | | | | | | | | | | |
| LAST NAME | FIRST NAME | MIDDLE NAME | SUFFIX | DATE OF BIRTH | GENDER | DISTRICT | SCHOOL | LOCAL ID | MATCH PROBABILITY | |
| <input type="radio"/> | Konyar | Melissa | | 11/15/2010 | FEMALE | 347228932 | 9999 | 55555555 | 100 [MATCH] | |
| <input type="radio"/> | Konyar | Missy | W | 11/15/2010 | FEMALE | 347228932 | 9999 | 654321665 | 87 [NEAR MATCH] | |
| <input type="radio"/> | Konyard | Melissa | Ann | 01/15/2010 | FEMALE | 113380303 | 2723 | 12345 | 85 [NEAR MATCH] | |



Threshold Settings in PAsecureID:

Lower Near-Match Probability Threshold: 85 percent

Upper Near-Match Probability Threshold: 94 percent

If the submission is uploaded with a state ID, it will not have had a near match.

Q. *How do you report a duplicate that is found during a near match?*

A. Contact Application Support PIMS Help Desk: 800-661-2423 to open a ticket.