EDIS READ – MATCH TOOL TRAINING

EDIS READ FILE SUBMISSION

MATCH TOOL
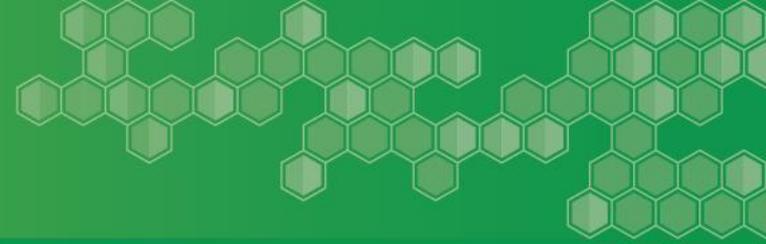
EDIS READ/MATCH TOOL TRAINING

2020
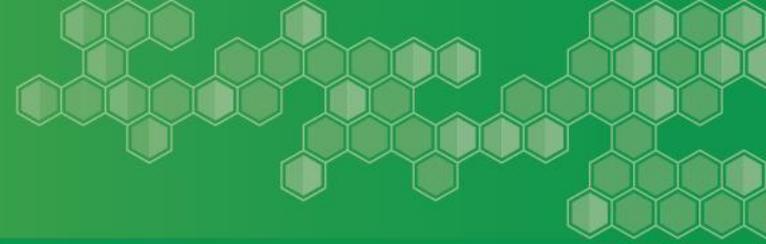
EDIS READ

Purpose of EDIS READ

❑ The purpose of the EDIS READ data submission is to find out if the educator already has an EDID number.

❑ Saves time by searching for a large group of educators at one time

❑ It is always best practice to search for an educator to see if the educator already has an EDID.

❑ Minimizes the opportunity of creating a duplicate

❑ Creates more efficiency with the users workload

EDIS READ/MATCH TOOL TRAINING
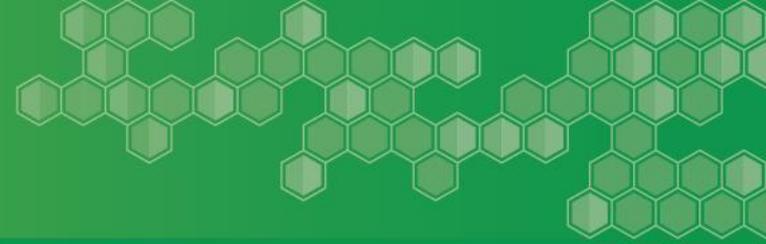
The goal of this training is to help local education agencies (LEAs) obtain EDIDs more efficiently and timely.

This training will include:

◊ EDIS READ File Layout specifications

◊ Submitting an EDIS READ file

◊ Batch Maintenance

◊ Validation Report

◊ Editing a Record

◊ Using the Match Tool when submitting an EDIS READ file

◊ Submitting to EDIS

Tips and Tricks

- You may submit an EDIS READ file anytime of the year regardless of what the school year reads.

- It can take up to several days during the busy time of the year, due to heavy volume, for records in case management to be reviewed.

- Follow the EDIS READ File Layout Protocol when submitting an EDIS READ File. http://www.cde.state.co.us/datapipeline/yr_rits

- You must go to the EDIT Record Screen in order to submit the file to the Match Tool.

- To check the status of your submitted records always check the EDID Download Report
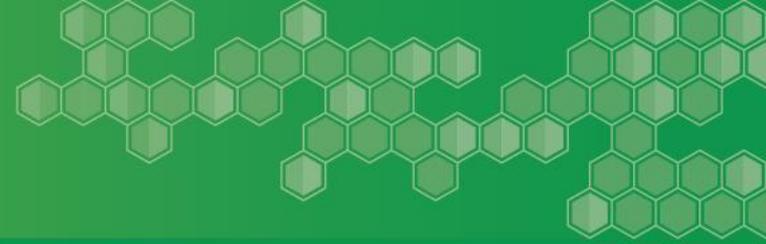
Access to the EDIS System –

To submit and update records via Data Pipeline your district's Local Access Manager (LAM) must grant you permissions under the role of "district admin"

To request access please go to this link:

https://www.cde.state.co.us/idm
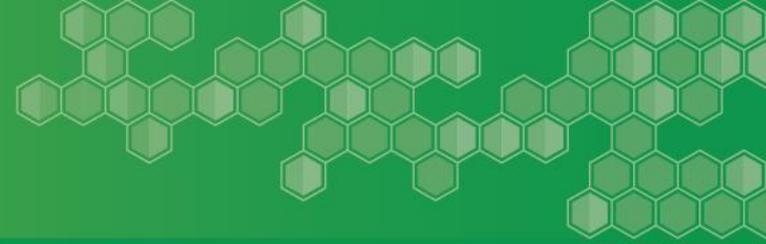
To log into Data Pipeline to submit an EDIS READ File you will use this link: https://www.cde.state.co.us/idm

You can bookmark this link for easier access.

Click on Data Pipeline ➡ Log in to Data Pipeline

Log in to Data Pipeline
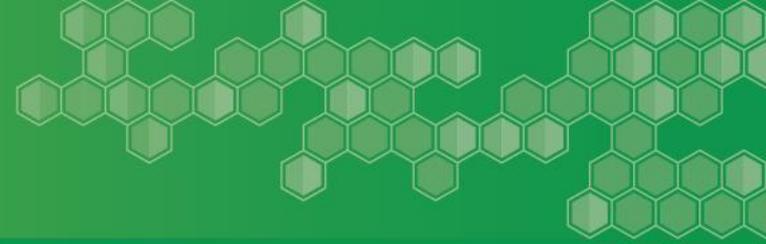
BUILDING THE EDIS READ FILE

To prepare the EDIS READ file follow your vendor's instructions for automatic export from your educators information system/Human Resources System. If your district is not set up for an automated EDIS READ export you will need to build the file yourself following the EDIS READ file layout specifications.

File Layouts can be found at the following link:

http://www.cde.state.co.us/datapipeline/yr_edis
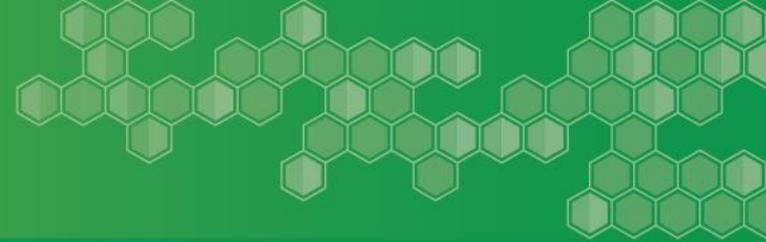
BUILDING THE EDIS READ FILE

You may submit a file in these three formatting choices:

- Text file

- Excel file - must include a header row with text

- CSV File - must include a header row with text

The naming conventions of the file is determined by the user, with the exception of the use of spaces in the file name - spaces are NOT allowed. Once your file is complete save it to a place that you will remember.
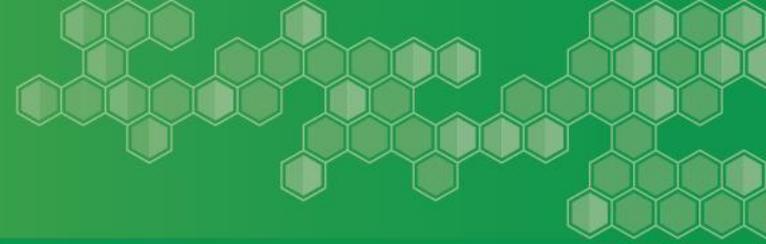
FILE UPLOAD

Click on File Upload- this will open up more choices. We will discuss each sub header as we progress in the training.
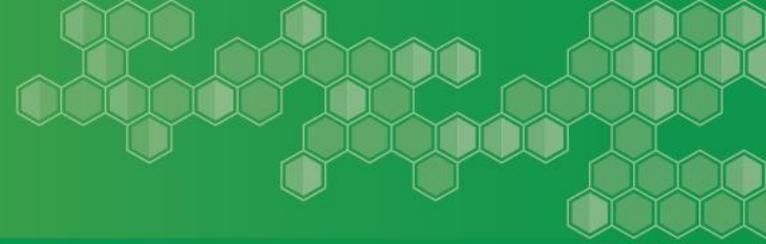
FILE UPLOAD

NEXT STEP: Click on Format Checker

Format Checker checks the first row (not your header row) of your file for formatting errors The system is not checking the formatting of the entire file ONLY the first row.

1. Choose your Data Set- EDIS
2. File Type - In this case EDIS Read
3. School year - current school year
4. Browse to where you saved your file
5. Click Upload

FORMAT CHECKER

The screen will display formatting errors in the first row of your file (not your header row); these errors will be highlighted in red. You will need to go back to your file and correct any formatting errors. Remember to correct your source system as well.

If you have many errors it might be best to correct in your source system and resubmit a file to the Format Checker.

If you have no errors in your file then the screen will show passed in green (see next slide).
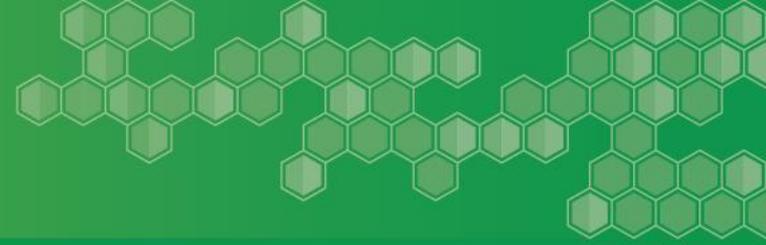
FORMAT CHECKER

Navigation	
• File Upload	
Format Checker	
Data File Upload	
Validation Report	
Batch Maintenance	
+ Directory	
+ EDIS	
+ Non Public Schools	
Report Card March	
+ RITS	
+ Dataset Administration	
+ Pipeline Reports	
+ Cognos Report	

Format Checker

Dataset * [EDIS ▼]

File Type * [EDIS Read ▼]

School Year * [2019-20 ▼]

File Name * [Choose File] No file chosen

[Upload]

| Data Element Name	Excel Column	Data Element Length	Original Length From File	Result
Edid	A2	8	0	Pass
Ssn Staff	B2	9	9	Pass
District Code	C2	4	4	Pass
Laedid	D2	10	10	Pass
Last Name Staff	E2	30	4	Pass
First Name Staff	F2	30	6	Pass
Middle Name Staff	G2	30	3	Pass
Birth Date Staff	H2	8	8	Pass
Gender Staff	I2	2	2	Pass
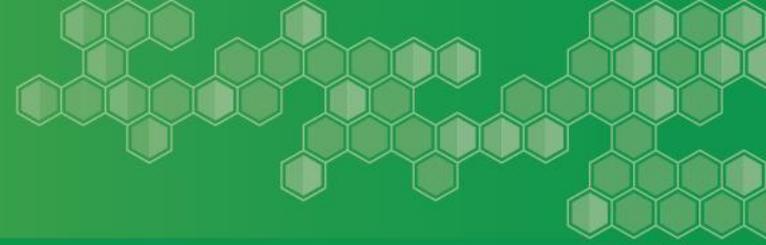
DATA FILE UPLOAD
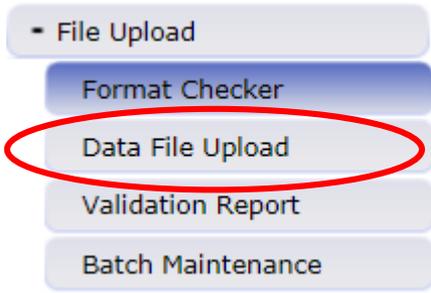

You are ready to upload your file –
Choose Data File Upload

1. Choose your Data Set- EDIS
2. File Type - In this case EDIS Read
3. School year - current school year
4. Browse to where you saved your file
5. Click Upload
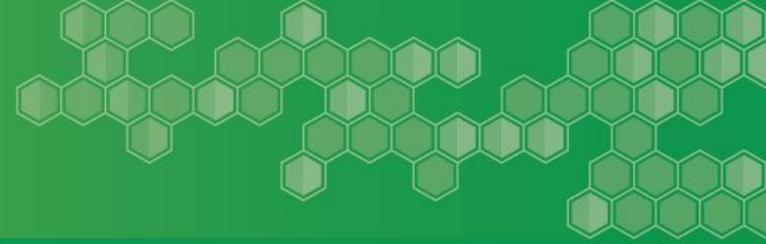
Once submitted you will get this message:


You will want to jot down the Batch ID for reference
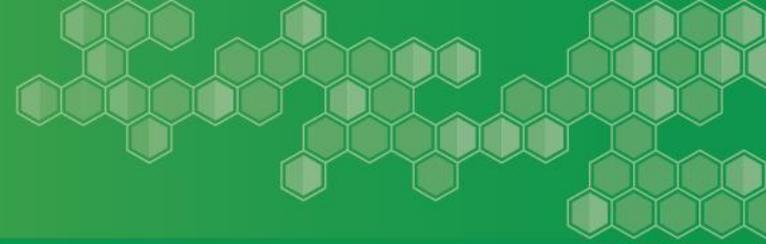
Validation Report
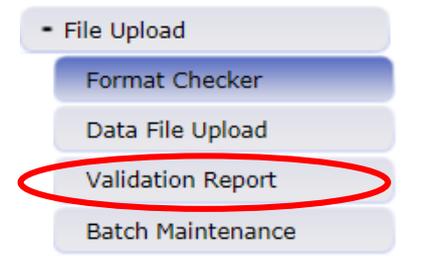
1. Choose your Data Set- EDIS
2. File Type - In this case EDIS Read
3. School year - current school year
4. Organization/LEA will populate with your district
5. Batch ID the one you just submitted
6. Click view Report

The Validation Report will show you what errors you have in your file. If there are no errors you will get a message telling you there are no errors in the batch. Below is an example in which the file has a few errors. This report just displays what the error(s) are in the file. You cannot fix any errors in this report.
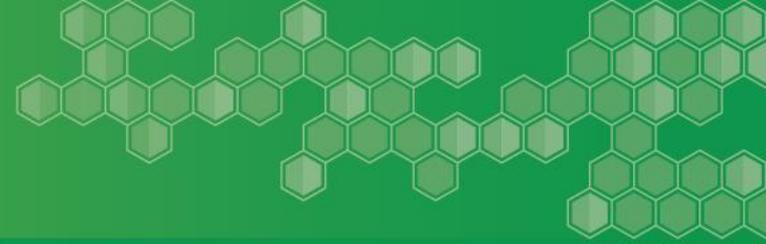
Validation Report

If you receive an error message and you only have a few errors, fix them and move on. If there are more than just a few errors go back to your file and correct the errors and resubmit the file. Remember to correct your source system as well.

Batch Maintenance
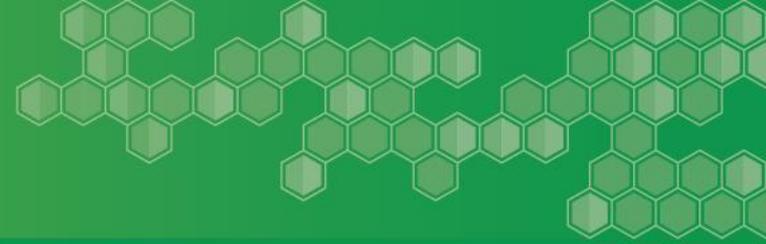
- File Upload
  - Format Checker
  - Data File Upload
  - Validation Report
  - **Batch Maintenance** ⬅

Batch Maintenance can be used when you want to see the error count and if your batch has processed.

If you have a need to delete the batch this can done in Batch Maintenance as well as downloading a submission.
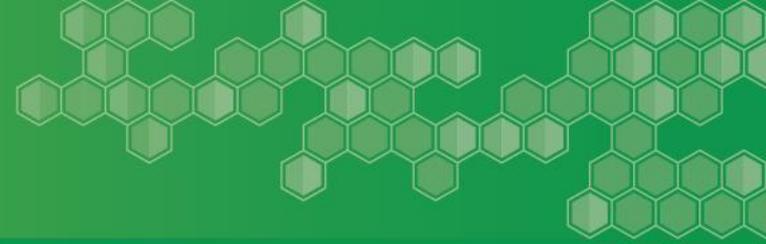
Cleaning up errors displayed from the Validation Report

+ File Upload

+ Directory

- EDIS

    Edit Record

    EDIS Match Tool

    File Extract Download

    EDIS Web System
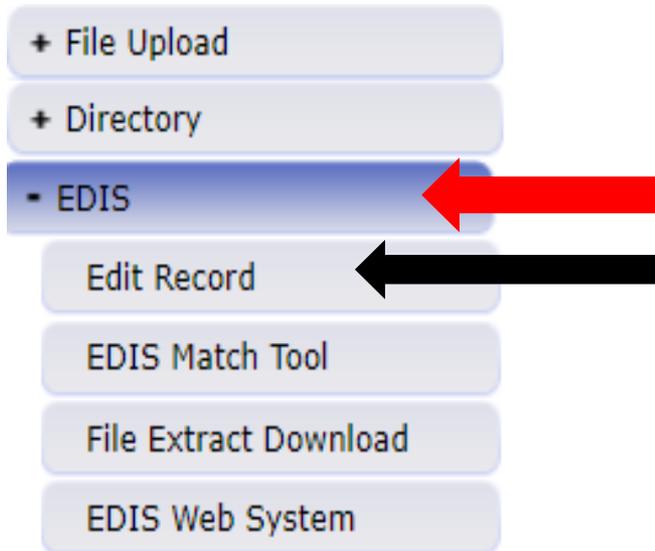
1. Click on EDIS

2. Click on Edit Record
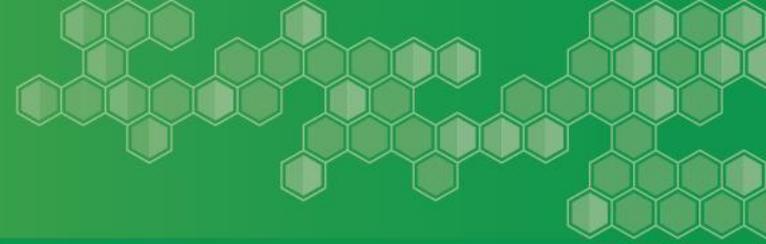
EDIT RECORD

- Choose File Type – EDIS READ
- School Year – Current school year will auto populate
- Organization – your district will auto populate
- Batch ID – Most current will be at the top of the list (this should match the batch ID that you jotted down)
- Error Records – All – selecting all will yield all of your records in the file
- YES – Selecting Yes will yield only records with errors
- NO – Selecting No will yield records with no errors

EDIT RECORD

Using the search fields such as EDID, Educators' First Name etc. you can find a record within your file.

Then Click SEARCH
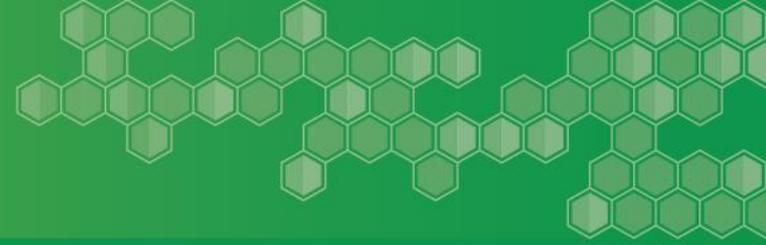
EDIT RECORD

❖ Fields that have an error will show up in red. Errors must be corrected to submit to the EDIS Match Tool.

❖ Fields that have a warning will show up in yellow. Warnings do not need to be corrected to move onto the Match Tool.

Errors - First name has a number in the field and the middle name field is blank

EDIT RECORD

The sort order #1, #2, and #3 offer the user options to sort the rows displayed.

Edit Record (2019-20) : 1420-Jefferson County R-1

Sort Order

#1 Last Name ▼   #2 First Name ▼   #3 EDID ▼   Sort Data

Last Name
First Name
EDID

Fields shown in RED have an error

Total # of Records : 2

Go to Standard View

	#	EDID	Social Security Number	School District/BOCES Code	LAEDID	Last Name	First Name	Middle Name	Date of Birth	Gender
☐	1		111111120	1420-JEFFERSON COUNTY R-1 ▼	1420000009	Princess1	Cinderella	Slipper	08241959	01-Female
☐	2		111111112	1420-JEFFERSON COUNTY R-1 ▼	1420000001	Test	Tester		05231988	02-Male

EDIT RECORD

To correct the errors you need to click the box on each row that needs correcting.

Fix the error(s) and click SAVE, you must click save before moving onto the next page if not your changes will not be saved.

EDIT RECORD

✓ You may delete a record in this screen. Check the box on the record that you would like to delete, click delete. You will get a message saying the record deleted successfully.

✓ If you have many errors in the file it may be better to clean up all your errors in your file then resubmit the batch.

✓ Remember that you need to update/correct your data in your source system as well.

Once your errors are resolved or if you had no errors in the file initially, click on Edit Record find your READ file, you are ready to submit your file to the Match Tool. Click on the submit to EDIS Match Tool.


This message will pop up - Click OK
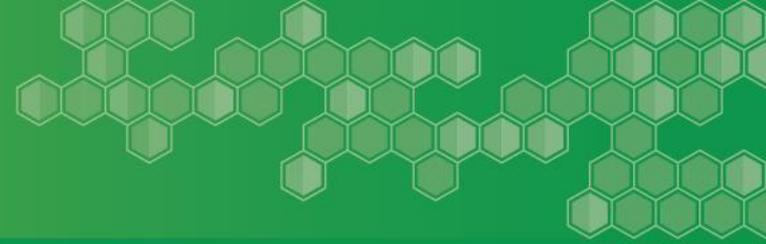
You will receive an email along with this message on your screen:

Edit Record
Data has been submitted to the EDIS Match Tool.

You are ready to work in the EDIS Match Tool –
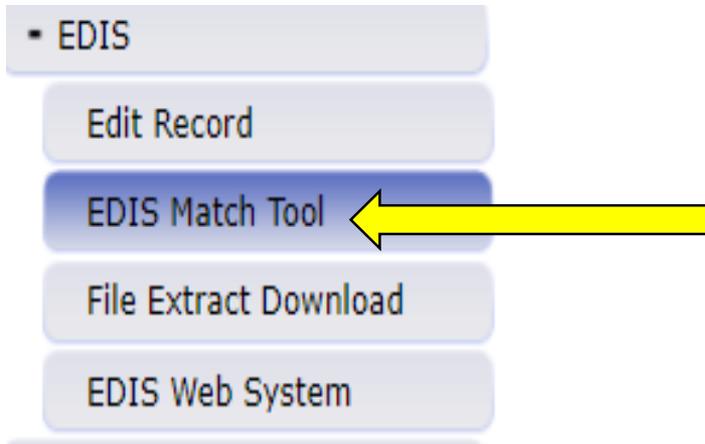
EDIS MATCH TOOL

❑ The Match Tool will show you the submitted record and the possible matches that are currently in the EDIS System.

THERE ARE TWO CHOICES:

❖ Submitted record - by choosing this record you are telling the system no match, give this educator a new EDID (referred to as an 'add').

❖ Possible match - by choosing this record you are telling the system these are the same educators and I want to update on the existing EDID (referred to as an 'update').

❑ You can enter a comment, do your investigation, then come back to these record(s) when you are ready to determine if there is a match or not. It is highly recommended that you enter a comment when there is a very close match and you have done your research. Your comments could be I-9 confirmed, Name change, correcting name, etc. There are many other things that you can add to comments to help when going through case management.

❑ The system will allow you to submit a partially matched batch.

❑ The system will also make matches for you, saving you time.

EDIS Match Tool

EDIS Match Tool

School Year*	2019-20 ▾		Organization/LEA*	1420-Jefferson County R-1 ▾		Batch ID*	362533 - 03/26/2020 12:37 PM ▾
% Match*	All ▾		Include Comments*	All ▾		Matched Records*	All ▾
EDID			First Name			Birth Date	
LAEDID			Last Name			SSN	
Submit Indicator	No ▾			Search			

You can sort by %Matched - >50% or >75

Include Comments – All, Yes and No

Matched Records All, Yes and No

There are many options that the user can choose to sort your data in the Match Tool. These fields are optional.

School year, Organization/LEA and Batch ID are required fields.

Click Search

29

ALL
MEANS
ALL
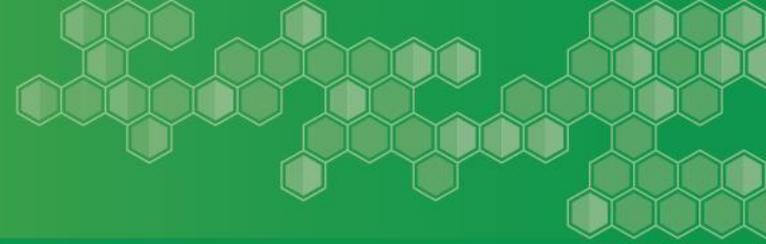
EDIS Match Tool

There are many ways in which to find a record if needed within the Match Tool:

- EDID, LAEDID(if used), First Name, Last Name, Gender, Birth Date, are ways to pin down a record within your file.

- The Submit indicator lets you know if data was already submitted to EDIS

- You may go in and submit a partial EDIS Batch.
    1. Submit the majority of your matched records to EDIS
    2. Go back and review only those remaining records by selecting the indicator to No. This will display only the records that have yet to be submitted to EDIS.

- This can be used when you have some records that need to be researched but want to submit the records that have been resolved. The system allows you to submit a partial batch.

Matching Records in the Match Tool

Screen will show the collapsed view, you can leave the screen like this if you would like to see more records on the screen.

Click on Show Search Criteria, sort options will appear, click on Search and the screen will compress.

EDIS READ/MATCH TOOL TRAINING

Go through each record making your selection between the submitted record and/or the possible match, by clicking on the radial button. Enter comments that will assist the EDIS Consultant while doing case review. Case #3 shows a 100% match, bullet already selected, thus doing the work for you. If there is no match for your submitted record the system will automatically assign a new EDID, the radial button will be filled in for you. Click SAVE once you are done matching.

EDIS Match Tool

+ Show Search Criteria

	#	Submission/ Possible Match	% Match	EDID	Last Name	First Name	Middle Name	Date of Birth	Gender	SSN	LAEDID	Last Updated District	Comments
○	1	Submission			Tesr	Tester	NMN	05/23/1988	02 - Male	111111122	1420000001	1420 - JEFFERSON COUNTY R-1	close the case typo in last name
○		Possible Match	6.4395	83578215	Test	Tester	NMN	05/23/1988	02 - Male		1420000001	1420 - Jefferson County R-1	
○	2	Submission			XXX	YYY	Zoe	04/11/1991	01 - Female	111111113	1420000002	1420 - JEFFERSON COUNTY R-1	MN confirmed per I-9
○		Possible Match	75.7575	28820854	XXX	YYY	Z	04/11/1991	01 - Female		1420000002	1420 - Jefferson County R-1	
○	3	Submission			Roadrunner	Speedy	G	03/11/1990	02 - Male	111111114	1420000003	1420 - JEFFERSON COUNTY R-1	
●		Possible Match	100	79373143	Roadrunner	Speedy	G	03/11/1990	02 - Male		1420000003	1420 - Jefferson County R-1	
○	4	Submission			Duck	Daffy	D	03/12/1989	01 - Female	111111115	1420000004	1420 - JEFFERSON COUNTY R-1	
○		Possible Match	68.9655	36373119	Duck	Daffy	D	02/12/1989	01 - Female		1420000004	1420 - Jefferson County R-1	
○	5	Submission			Dumbledore	Potter	H	01/01/1955	02 - Male	111111116	1420000005	1420 - JEFFERSON COUNTY R-1	
●		Possible Match	100	95612783	Dumbledore	Potter	H	01/01/1955	02 - Male		1420000005	1420 - Jefferson County R-1	
○	6	Submission			Unicorn	Rainbow	NMN	12/27/1981	01 - Female	111111117	1420000006	1420 - JEFFERSON COUNTY R-1	
○		Possible Match	75.7575	44033929	Unicorn	Rainbow	Horn	12/27/1981	01 - Female		1420000006	1420 - Jefferson County R-1	
○	7	Submission			Shiny	Shower	Grimy	10/10/1970	02 - Male	111111118	1420000007	1420 - JEFFERSON COUNTY R-1	legal name change
○		Possible Match	62.5	84749464	Dirty	Shower	Grimy	10/10/1970	02 - Male		1420000007	1420 - Jefferson County R-1	
○	8	Submission			Goliath	Sam	Giant	09/09/1968	02 - Male	111111119	1420000008	1420 - JEFFERSON COUNTY R-1	
○		Possible Match	64.1025	81473463	Goliath	Sampson	Giant	09/09/1968	02 - Male		1420000008	1420 - Jefferson County R-1	
○	9	Submission			Glass	Cinderella	Slipper	08/24/1959	01 - Female	111111120	1420000009	1420 - JEFFERSON COUNTY R-1	legal name change
○		Possible Match	62.5	13905731	Princess	Cinderella	Slipper	08/24/1959	01 - Female		1420000009	1420 - Jefferson County R-1	

Page 1 of 1   Go to page: [____] [Go] |< < > >| [25 ▼] Per Page   Total No. of Groups: 9

Save   Submit to EDIS

MORE OPTIONS
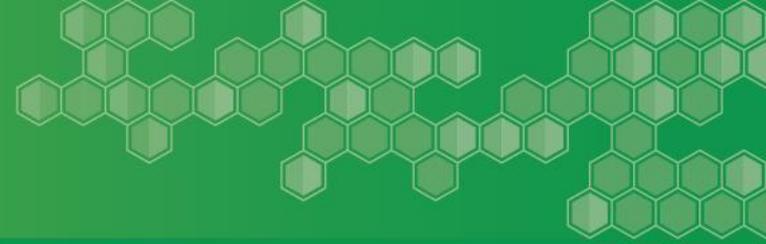
After you are done matching on that page, click SAVE. If there is more than one page of matching to complete, click SAVE after each page has been matched.

You can close out and return to your file, remember to jot down the page number that you last worked on. Always click SAVE before you close out of the Match Tool or you will lose your work.

Once all matches are completed click Save, then click on Submit to EDIS.

This action will send your matched records to the EDIS Web System and populate the EDID Download Report.

Save   Submit to RITS
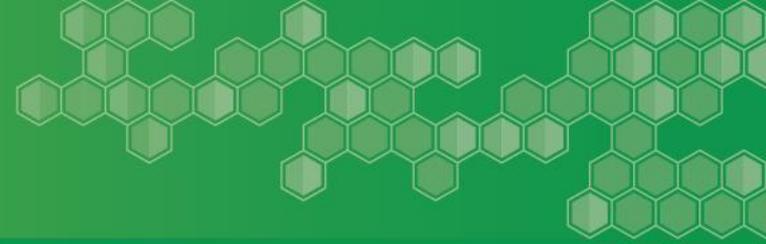
EDID Download Report

The EDID Download Report can be found in the EDIS Web application.
https://www.cde.state.co.us/idm/rits

*Please note this is outside of the Pipeline page.

Reports are on the left under all the navigation links.

Reports

Student Activity Report

Taken Students Report

Student History Report

SASID Download Reports

LASID Download Reports
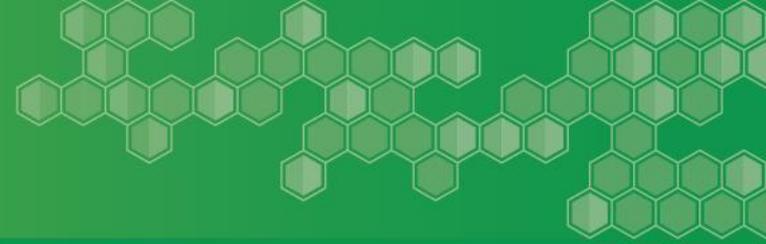
EDID Download Report

Upon navigating to the EDID Download Report you will need to find your file that you submitted:

Your district will automatically default to open in the District Tab

Case type gives you three options to choose: READ, Batch and Web. However you submitted your records they will always flow into the EDID Download Report. In this training we submitted via READ

EDID Download Report

Once you have chosen the case type READ, Batch or Web, you must then find the Batch. Click on the Batch ID and you will see a list of READ Files submitted. Notice they all start with an R for READ. If you submitted a Batch submission all of your submissions would begin with a B. Web will have the submission and date with a W by it.

READ Files

Batch Files

Web Files

EDID Download Report

The EDID Download Report can also be downloaded, there are three file formats when downloading, CSV, Fixed Length and Tab Delimited, in addition you can download the file to include the full SSN.

Sort order 1,2,3 and 4 gives the users the sorting capability within the records submitted

37

EDID Download Report

When viewing the records submitted you will notice that there is a case type.

Review – the record went to case management and the EDIS Consultant will need to look at it.

Update – The record was updated on an existing EDID in the system. The record will indicate which EDID it was updated upon.

Add – A new EDID was assigned to the record. The record will indicate the new EDID assigned.

EDID Download Report

You can download the report with the entire SSN

Case ID assigned to each open record in review

3 types of cases

Organization
Jefferson County R-1

Case Type *(Select Case Type)*
Read

**Data Pipeline Batch ID & Date**
R362534 - [03/27/20 (F)]

Sort Data

SortOrder1: LastName

SortOrder2: SubmittedOrder

SortOrder3: LAEDID

SortOrder4: Last Organization to Update

RefreshReport

☐ Download Report Containing Full SSN

Download File Format
CSV

Download

Total number of records: 3

EDID	Last Name	First Name	Middle Name	DOB	Gender	SSN	Last Organization to Update LAEDID	Case Type	Case ID	Status
	Pout	Pout	Fish	07/26/1957	Female	111111122	Jefferson County R-1	Add		
	Shiny	Shower	Dirty	10/10/1970	Male	221111111	Jefferson County R-1	Add		
	Unicorn	Rainbow	Bright	11/27/1981	Female	111111117	Jefferson County R-1	**Review**	611382	Open
	XXX	YYY	Zoe	04/11/1991	Female	111111113	Jefferson County R-1	Update		

Once the record is processed the status will change from open to closed
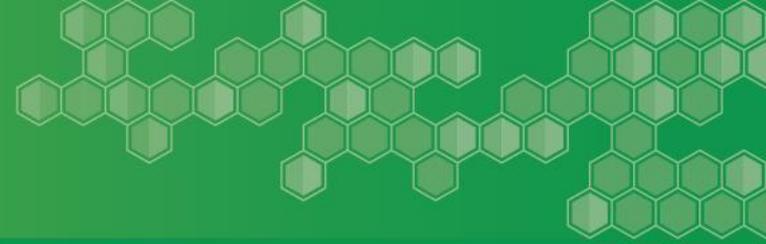
Should you have further questions please contact:

Debbie Puccetti
EDIS Consultant
Puccetti_d@cde.state.co.us
303-866-6612

This training as well as other information can be found at the following website:

http://www.cde.state.co.us/datapipeline/yr_rits