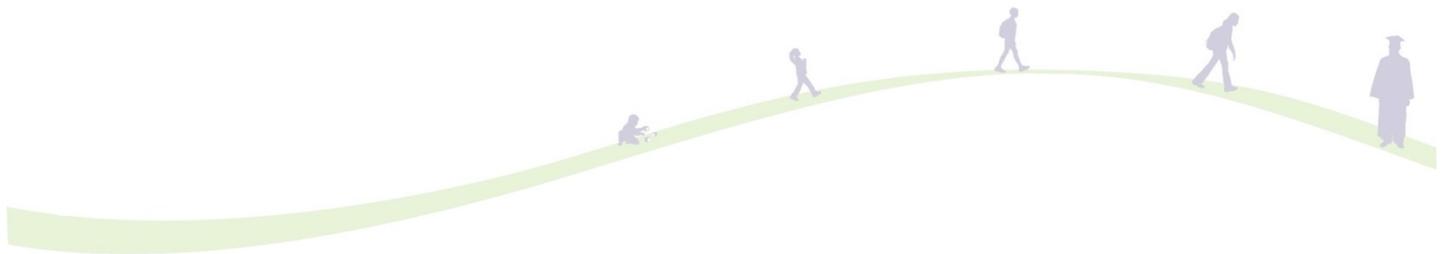


QUICK START GUIDE

**Direct Certification
& Direct Verification**

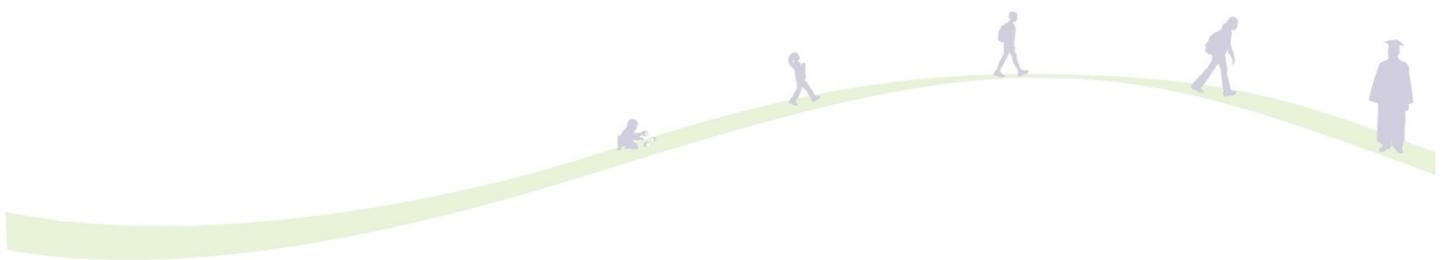
for 2014-2015 School Year



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(Rev. June 2014)

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I. Introduction

This document is intended to get you up and running VERY QUICKLY in our new Direct Certification System. Many pages, but mostly pictures. We'll be augmenting this information within a week, building a more thorough understanding of this new system and the features available. This current document is meant to safely allow you to do the very basic first day tasks that you need to do to get started, hopefully as soon after the **Beginning of July** as possible. We'll talk a little bit about the changes here, and go into much greater detail in the longer document. I encourage you to take the time to read this document and familiarize yourself with the steps.

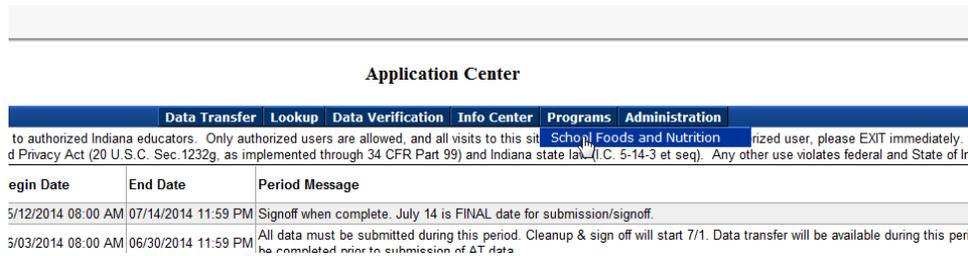
Please watch for revisions, changes, and enhancements to this document in the very near future.

Please continue to offer us feedback on any problems that you encounter, or features that you would like to see. I can be reached at jtodd@doe.in.gov. If you send emails, please put *Direct Certification* on the subject line.

II. Accessing and Logging into the Direct Certification and Direct Verification System

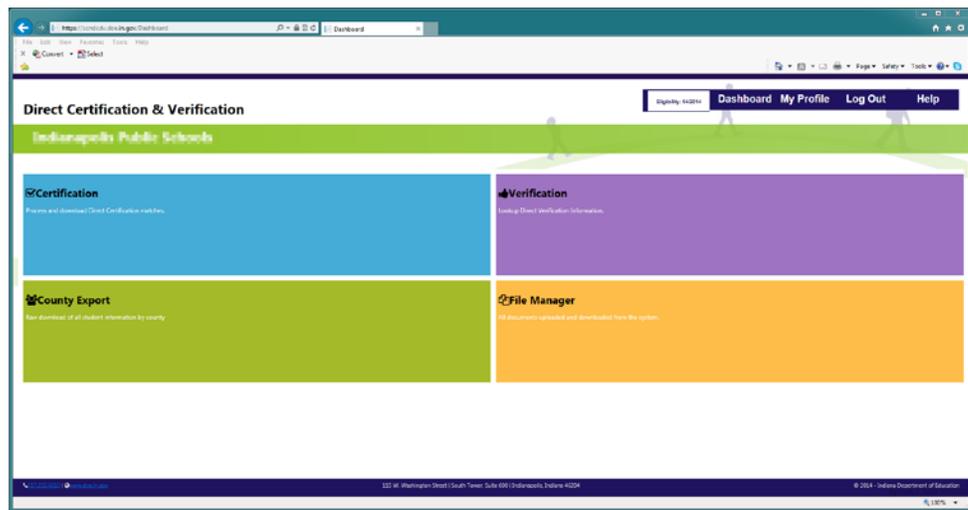
You can reach the Direct Certification (and later, the Direct Verification) systems in one of two ways.

You can continue to reach it by logging into the Application Center, then clicking **Programs | School Foods and Nutrition:**



When you click on School Foods and Nutrition you will essentially be taken out of the familiar Application Center Environment and land in a new web portal. If you are comfortable doing it this way, you can continue to do it this way.

You will land on a page that looks like this and is our new Direct Certification/Verification web portal:



(Illustration 1)

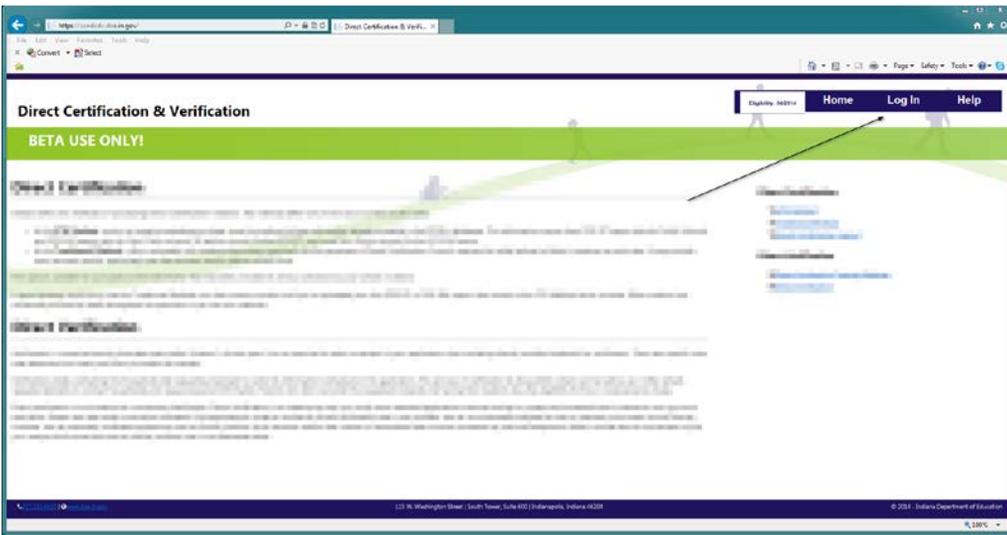
You're in!

Alternatively, you can avoid the extra mouse clicks on the Application Center and log directly into the new web portal directly.

The URL for Direct Certification and Direct Verification services is now:

<http://scndcdv.doe.in.gov>

You can save this URL for future use. If you go to the new portal directly, you will see this when you use the above URL:



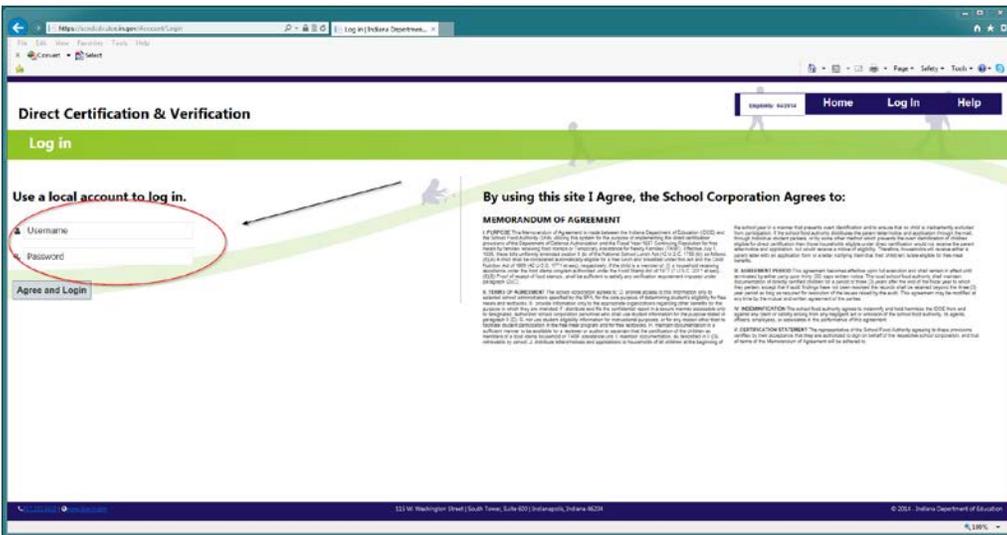
(Illustration 2)

Look here for helpful notices and links to resources.



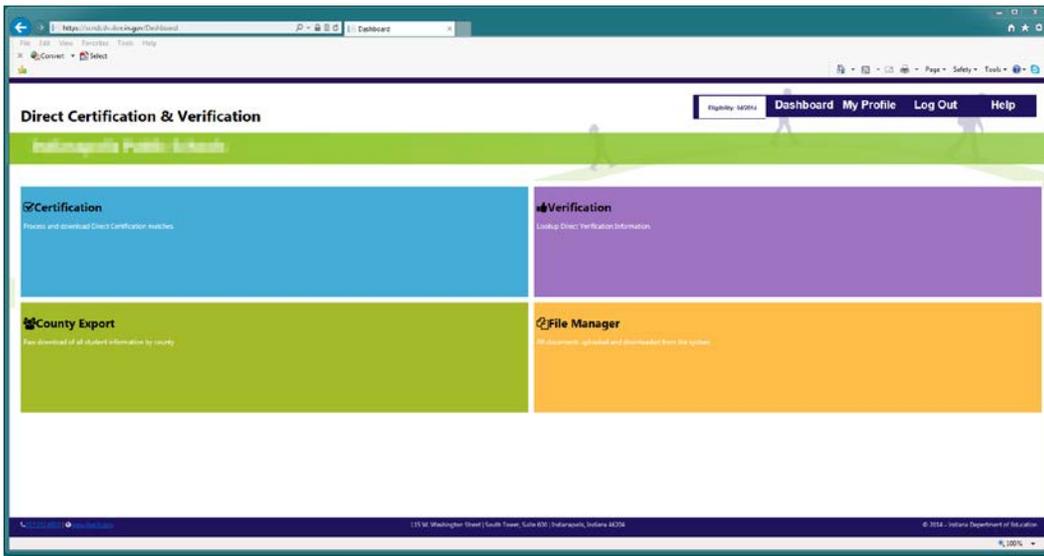
Also, right next to the **HOME|LOGIN|HELP** bar, see the notice “Eligibility : 07/2014”. You can now determine if the state has updated its Program data without even having to complete the login. As many of you know, we update the data, normally at the start of every month, using an end of month file from the previous month. At the beginning of the Direct Certification Year, starting in July, the system will be loaded with June data and report accordingly. The data will be updated monthly and the indicator refreshed. This indicator tells you if this update has occurred.

Clicking on the **Log In** in the upper right corner you’ll be taken to this screen:



(Illustration 3)

You will use the IDENTICAL login that you used with the Application Center. When you login, please note that you’ve also agreed legally to the terms of use. Once you’re logged in you’ll see the same screen that you would see if you entered via the Application Center login. We call this the Dashboard and from here you can navigate to all the functions of the site.



(Illustration 4)

You're also in!

III. Basic Tasks of Direct Certification – STN Matches (See Chapter V for “Traditional Matches”)

Most users can accomplish their immediate needs very simply, and hopefully easier, under the new system.

Your needs can be characterized simply as:

- I don't want to have to upload anything.
 - ❗ (If you want to upload data first, as in the previous Traditional method, read Chapter V and do the upload first.)
- I want to be able to download information on all the students who can be directly certified based on either participation in SNAP/Food Stamps, TANF, or Foster Child status.

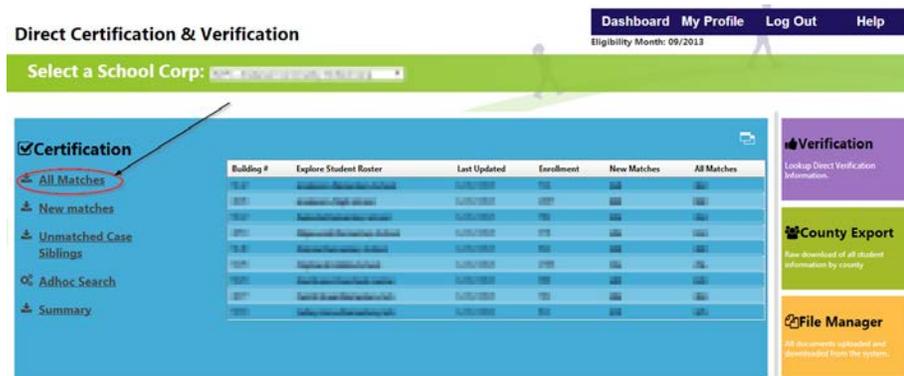
Our old system called this an STN Method match since the process relied on STN information already available in the Indiana State Department of Education State Student Information System¹.

The first chapter on Logging in left us on what we call the Dashboard. The Dashboard looks like the picture below and you should click on the block in the upper left hand corner entitled “**Certification.**”



(Illustration 5)

Whether you want all your matches or only the new matches, you can easily access them here. Since you're reading this Quick Start Guide, I'm assuming that you're using the new system for the first time. Click **All Matches**. (Oddly, it doesn't matter if you click **New Matches**, since it's the first time you've used the system for the upcoming school year All the Matches are **New Matches**!)

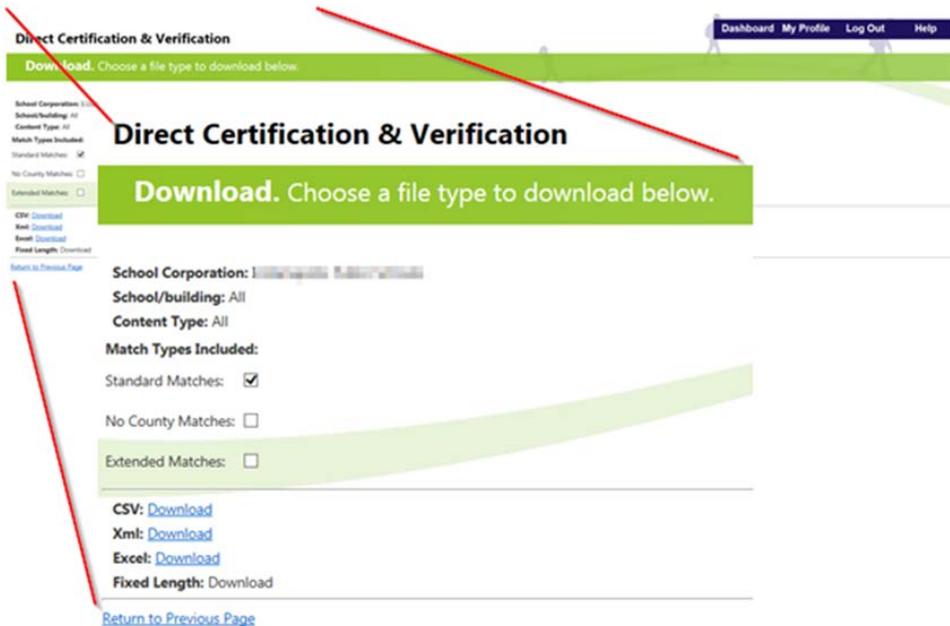


(Illustration 6)

¹ Information used combines STN information with information from the DOE-RT report for public schools and the DOE-EM report for nonpublic/parochial schools, as well as other data collections.

For a complete discussion of New vs. Old Matches, please read the longer complete guide. Generally, the system works as it did in the past version. Once you click on **All Matches** or **New Matches**, and DOWNLOAD the results, we assume that you’ve captured the records and we won’t show you those records again on any subsequent New Matches request.

Once you click on “**All Matches**”, you’ll be taken to this screen:



(Illustration 7)

Remember that if you download “no county” matches, you’re including kids that the data shows may live in a totally different city. In many cases the student’s family has moved recently and the Food Stamp program is still in the process of updating the record. We do know that the student’s first and last name match in some manner and that his birthdate is an exact match. Now there could be a two William Smith babies born in different parts of the state on the same day, but depending on the name it is increasingly unlikely. Very often the No County Matches are perfectly valid, particularly when you have anecdotal evidence that the family has recently moved or the reported address is near to your schools location, but in a different county.

You can process standard matches separately from no county matches in two separate downloads, or combine them in one downloaded file. If you do combine them all in one file by checking **both** Standard and No County Matches, you can separate out the No County Matches with the Assistance Code, which is field 22 in the file:

22	Hard/Soft Match	1	Data Type: Alpha Valid Range: H=Hard (Exact) Match S=Soft (Sound Alike on First Name) Match C="No County" Match X=Extended Match M=Extended- Manual Match
23	Certification Date	10	Data Type: Alpha-Numeric MM/DD/YYYY

(Illustration 8)



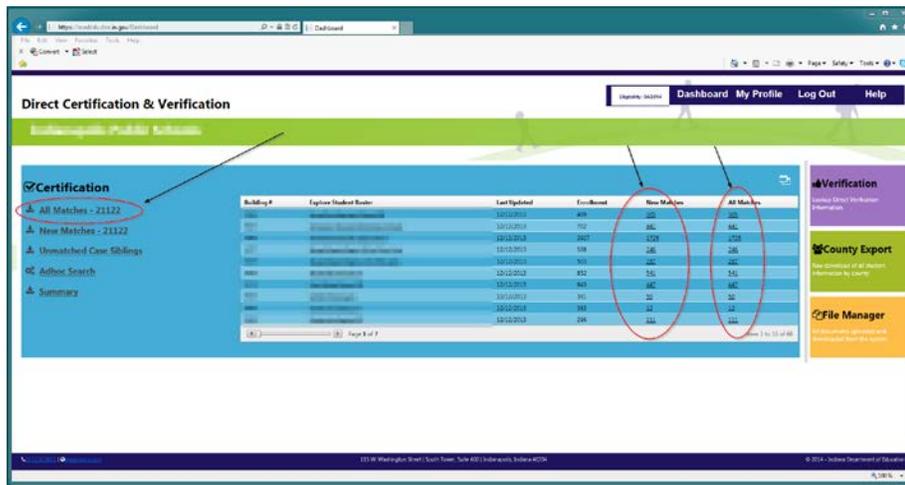
In past years this field only held H and S values. We’ve added C, X, and M. For a complete discussion see the complete guidance manual.



Until you’ve read the complete guidance manual I encourage you to not download extended matches.



Having already briefly discussed New and All matches, I'd like to mention one more feature of the new system:



(Illustration 9)

The new system allows you to download All or New Matches by clicking on the choices on the LEFT side of the screen. A totally new feature is the ability to view/download matches at an individual school level. You'll notice that the numbers of matches in the two columns on the right are "clickable" links. If you click on the number, you'll be set to download the match results **JUST** for that school. (Private/Parochial schools may be "single site sponsors" and in that case, there is only one site/school listed, and clicking links on the right are equivalent to clicking a link on the left.

For just the single school dataset you would still download as above, by selecting Standard matches, No County Matches, etc., and choosing the download format. (See Illustration 7)

The problem, is that if you download just a single school's matches, you've set the "already viewed" marker on those records, and you would not see matches again for that school in the "only the new" set of records. I encourage you to use this feature thoughtfully after you have some experience with the system. You can always in effect reset the system by downloading ALL matches.

There's also the ability to download extended matches. There probably aren't many, and we'll describe that in the longer manual.

Where are the "Un-Matched Siblings?" They are available, but **from** a slightly different place. It is important to realize that these are not matches in the normal sense. The Standard, No County, and Extended (All or New) involve matches to some degree, with various degrees of strictness, moving progressively down the scale from exact matches, to matches where the first name sounds similar, to matches that the county doesn't match etc. The Unmatched Siblings represent children (usually younger or older brothers or sisters of your students) who are not currently reported in the state's student information system. We are supplying you with the names of other members of the SNAP or TANF case where you have at least one member of the case that has been identified as one of your students. It's a good place to look for baby sisters or brothers who may enroll in the fall for the first time. Find them here:

Direct Certification & Verification

Equity: 06/20/14 Dashboard My Profile Log Out Help

Indianapolis Public Schools

Certification

- All Matches - 21122
- New Matches - 21122
- Unmatched Case Siblings**
- Adhoc Search
- Summary

Building #	Explore Student Roster	Last Updated	Enrollment	New Matches	All Matches
0000	[Link]	12/12/2013	489	205	205
0001	[Link]	12/12/2013	702	451	451
0002	[Link]	12/12/2013	2987	1728	1728
0003	[Link]	12/12/2013	568	295	295
0004	[Link]	12/12/2013	369	242	242
0005	[Link]	12/12/2013	852	541	541
0006	[Link]	12/12/2013	943	447	447
0007	[Link]	12/12/2013	381	33	33
0008	[Link]	12/12/2013	383	12	12
0009	[Link]	12/12/2013	296	111	111

Page 1 of 7 Items 1 to 10 of 18

Verification
Link to Direct Verification Information.

County Export
Raw download of all student information by county.

File Manager
All documents uploaded and downloaded from the system.

(Illustration 9)

The Unmatched Siblings can be downloaded using the same general scheme as other downloads. See Illustration 7.

IV. Basic Tasks of Direct Certification – Ad Hoc Searches

There will always be students who you suspect are potentially directly certifiable but that don't appear on the list. This could be for a number of reasons. Perhaps you know that the last name in the SNAP/Food Stamp system varies from the last name in the school STN records. (We've improved the handling of hyphenated names though and will now match SMITH or WILLIAMS with SMITH-WILLIAMS.) Maybe other errors such as birth date key entry errors keep the matching algorithms from working. There are many reasons. While it is not a "matching process" because we are not using any school side data at all, you can in effect "browse" the SNAP, TANF, and Foster Child Records, by using the *Ad Hoc* lookup feature.

You'll navigate to this feature from the Dashboard...



Then...



And you'll get to the search entry screen. The old system had three separate search styles: Case, Student Information, or Parent Guardian Information. The new system has a unified search interface. Put down the information that you know and press search. Often you'll be searching on Student First, Student Last, DOB and County. Leave out DOB, and it will work, but you may get more matches, depending on the commonness of the name. You should general search by a specific county UNLESS you know that a family recently moved and you want to search for a student that you think may still be listed in a recently moved from county. .

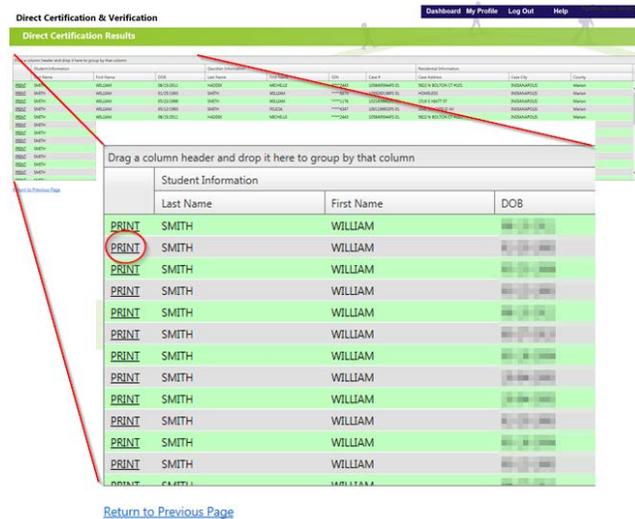


If you do search on case, I suggest that you only enter the Case Number and nothing else. Complete Case numbers in Indiana look like this:

1099999999ADCR01 or
1099999999FS 01

Even if you do have the 2 or 4 letter suffix and the last two digits, I suggest that you search only on the first 10 digits, that also begin with “10”, as indicated above by underline. This is the same as in the old system.

Once you hit the search button your results will be displayed in short order in a results grid:



(Illustration 13)

How many results you get will depend on how “open” your search criteria were. Further refine your search by using the additional information displayed in each row: Addresses, Parent Guardian information etc, and find the student you’re looking for.

Once you’ve identified your student from the available records, click the “print” button found on the left. You’ll then have displayed a page like this:

Direct Certification

Search Date: 7/2/2014

Child Information
 Name: SMITH, WILLIAM T
 D.O.B.: [REDACTED]

Guardian Information
 Name: [REDACTED]
 Case #: [REDACTED]
 Address: [REDACTED]

Eligibility
 Direct Certification Based on program participation in month of: [REDACTED]
 Eligible Federal Programs: SNAP/Food Stamp-All other members of household can also be considered Directly Certified

(Illustration 14)



As in past years, you should save this printed statement as “Proof” that the child/student is directly certified. This saved document is as valid a proof as a student being listed in any of the downloaded lists.

V. Uploading the “Traditional Direct Certification Data File

Everything so far as assumed that you want to do what in the past was called an STN Match. These matching processes require no additional data to be uploaded and rely on existing IDOE STN data: DOE-RT, DOE-EM, and others.

Some of you in the past used an enhanced method and uploaded a data file that improved on what we have available over the summer months at DOE. The idea was that YOU, having rolled over your student master, know some things that we don't. Fall semester grades and buildings, perhaps some preregistered new students etc.

This feature is still available, but in a different sense. We know longer have STN vs Traditional Matching Processes. There is one unified matching process. However, if you do the supplemental and optional upload, STN records will be augmented with that data, having some benefits in the matches made, and the information returned in downloaded files.

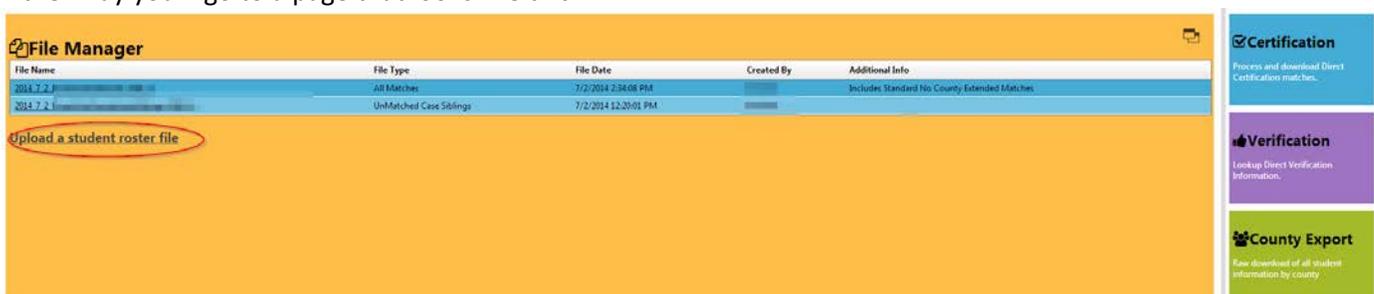
To do the file upload, go to the **File Manager**:



Or alternately something like this as the tiles rotate around depending on previous choices.....



Either way you'll go to a page that looks like this:



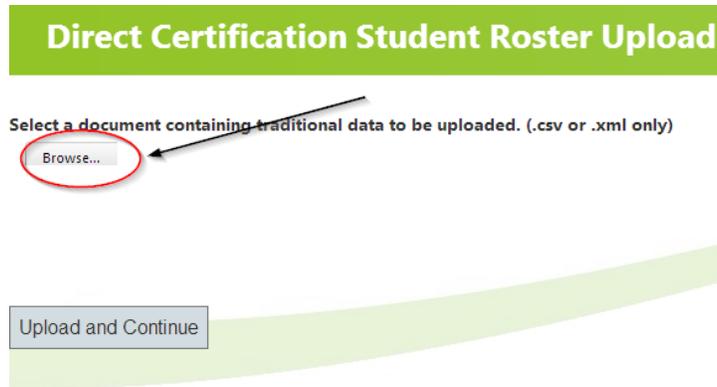
You'll see previous files downloaded on this page, similar to the old "Archive", but it's also the place that you'll upload **Traditional** Data files from.

Click on **“Upload a student roster file”**, and you’ll be at a simple browse/upload dialog box similar to the past. You do not need to select the file upload type, it determines that automatically.

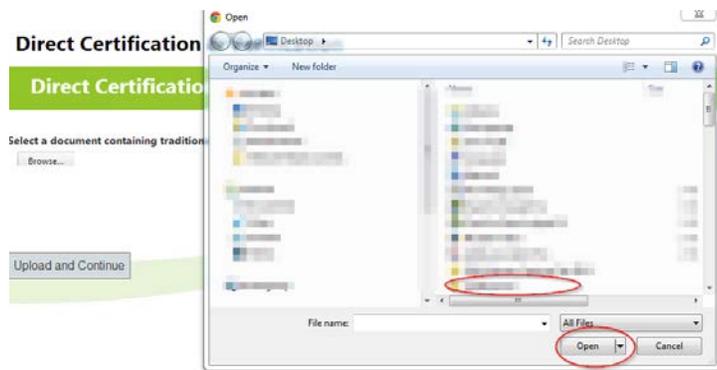
Follow the uploading directions carefully. They’re logical, but different than in the past. There are four steps:

① Select the File

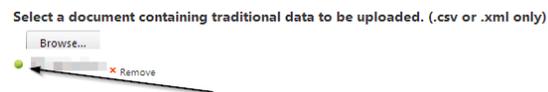
Click Browse



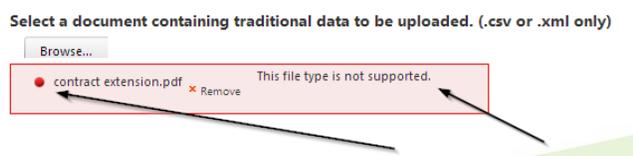
Find the file on your local file system



The system will confirm that it’s a supported file type and display its name with a green dot.

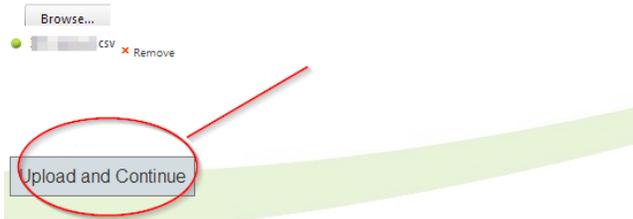


Or show it’s displeasure with a red dot and warning message! If so, remove and try again



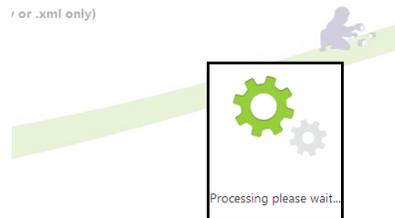
② Upload the file for parsing and processing against business rules

Select a document containing traditional data to be uploaded. (.csv or .xml only)



Wait while this happens.....

(.csv or .xml only)



③ View Success and errors

Direct Certification Studer Roster File

Summary Errors Raw CSV

- Good Student Records: 29568
- Bad Student Records: 0

To confirm this roster and post it to the system please review the below information and click the continue button below.

Confirm and Post this Roster to Corp 5385 OR Cancel and Return to Dashboard

Direct Certification & Verification

Direct Certification Studer Roster File

Summary Errors Raw CSV

Drag a column header and drop it here to group by that column

Item

No records to display.

To confirm this roster and post it to the system please review the below information and click the continue button to

Confirm and Post this Roster to Corp 5385 OR Cancel and Return to Dashboard

Direct Certification Studer Roster File

Summary Errors Raw CSV

Drag a column header and drop it here to group by that column

Item
48.5385.5012.Pendgraf,John A., 2/11/2000, 3337 49th ST NW, BETHLEHEM POLICE PL 48224,282568,Pendgraf,John A., 810610,C
48.5385.5668.Johnson,Alan E, 26/29/2000, 6308 WEDGEWOOD WAY, BETHLEHEM POLICE PL 48224,24736,2481361,Johnson,Alan E., 232107,C
48.5385.5511.Lutenmoot,Sean Dean, 8/31/1986, 200 N. TERRY AVE, BETHLEHEM POLICE PL 48222684,251553,Lutenmoot,Sean, 8.370961,C
48.5385.5538.Ford,Kenya, 8/15/2000, 2130 N. LESLEY AVE, BETHLEHEM POLICE PL 482281737,2472958,Ford,Kenya, 7,8196020,C
48.5385.5507.Young,Brennan T., 1/20/2004, 3509 Apache Walk, Apt. 448,Bethlehem,PA 48024,2473388,Young,Brennan, 4,1200787,C
48.5385.5512.Matko,Kamari L., 3/4/2000, 3611 N. KEYSTONE AVE, BETHLEHEM POLICE PL 48202,2499677,Matko,Kamari, 8,1306926,C
48.5385.5558.Williams,Dorothy C., 3/24/1982, 2428 E. 18TH ST, BETHLEHEM POLICE PL 48204,2464888,Williams,Dorothy, 3,1306500,C
48.5385.5556.Sullivan,Bryanna, 3/8/2004, 782 N. DRAPER ST, BETHLEHEM POLICE PL 48202,2512777,Sullivan,Bryanna, 4,1305058,C
48.5385.5553.Jackson,Kristanna L., 3/26/2005, 361 N. KEYSTONE AVE, BETHLEHEM POLICE PL 48202,2499677,Jackson,Kristanna, 3,1304923,C
48.5385.5514.Williams,Leticia T., 1/16/2005, 1813 Mendham PL, Bethlehem,PA 48024,2495436,Williams,Leticia, 1,1411153,C
48.5385.5586.Williams,Cassie L., 3/26/2007, 3575 SCARLETT TER, BETHLEHEM POLICE PL 48224,2515530,Williams,Cassie, 1,1411153,C
48.5385.5643.Obenay,Sarahannah Nichole, 10/30/1987, 2601 Cold Spring Rd, BETHLEHEM POLICE PL 482222502,2504242,Obenay,Sarahannah, 1,1494451,C

To confirm this roster and post it to the system please review the below information and click the continue button below.

Confirm and Post this Roster to Corp 5385 OR Cancel and Return to Dashboard

④ Finish Things up by choosing to load data or reject

Direct Certification & Verification

Direct Certification Studer Roster File

Summary Errors Raw CSV

- Good Student Records: 29568
- Bad Student Records: 0

To confirm this roster and post it to the system please review the below information and click the continue button below.

OR

You can now return to Chapter III and process your matches.

VI. Contact Information:

John Todd
Indiana Department of Education
317/232-0865
jtodd@doe.in.gov