EDUID User Manual

IDAHO STATE DEPARTMENT OF EDUCATION
TECHNOLOGY SERVICES | ISEE

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INTRODUCTION

The Education Unique Identifier (EDUID) application is used to assign and verify unique IDs (nine-digit numbers) for individuals associated with educational programs in the State of Idaho. All students attending and staff, including substitutes (certified as well as non-certified), in Idaho publicly funded K-12 educational institutions are required to have an EDUID number.

Information can be submitted in a batch via a CSV file or individually on the EDUID website. The EDUID application compares submitted name information with current data contained in the Idaho State Department of Education (SDE) database with four potential results. The matching process will produce one of four results:

1. If the submitted new person's **name** is very similar to a person already in the database, a match is made and the EDUID is returned to the submitter (either displayed on the screen or in a CSV file). However, if the date of birth (DOB) is not exact, no match is found – even if the submitted name is exactly the same as in the database.
2. If no strong match is found, but one or more existing people are fairly close matches, the submitter is asked to determine if one of them appears to be a correct match. If none are a correct match, a new record and identifier should be created.
3. If the new person's submitted information is very similar to multiple people already in the database, then the submitter is asked to determine which of the matches would be the best match or whether a new record and identifier should be created.
4. If the new person's submitted information is NOT sufficiently similar to a person already in the database, a new record and EDUID can be created and the EDUID is sent back to the submitter (automatically, without input from the submitter).

Important: If the birthdate is not exact, there will be no matches returned. If the person is coming from another Idaho district and you have no matches listed, verify the correct birthdate. Submit an OTIS ticket to SDE Support if the DOB is incorrect in the SDE database. Instructions for submitting an OTIS ticket can be found on the ISEE homepage under the Training tab.

The EDUID system relies on this data to determine if the submitted name is a match to an existing person. The primary comparison data is:

- Legal Name
- Given (a combination of first, middle and any suffix) and
- Family (last name)
- Gender
- Date of Birth
- State code of Last School Attended (optional)

Idaho statue § 18-4511 (2) mandates that names be obtained from legal documents.
- Use complete legal names – full middle names and maternal and paternal family names where applicable.
- Names can be obtained by a certified copy of the person's birth certificate, a passport, a visa, or other government documentation of the person's identity
- A document can be found on the ISEE homepage under Program Information titled Naming Guidelines to assist districts in reporting names correctly.

If you are searching for someone who you know was previously an Idaho student or staff, but cannot retrieve a matching EDUID, DO NOT CREATE A NEW EDUID. Contact SDE Support for assistance.

ACCESSING THE EDUID APPLICATION

Before accessing any SDE application, users must first obtain a login and password. Please refer to the New SDE Applications User document.

Navigate to the SDE homepage www.sde.idaho.gov/
- Click on the ISEE tile
- Click on the SDE Applications Portal tile
- After correctly logging onto the portal, the user will be directed to the Applications page (as noted in the graphic below).
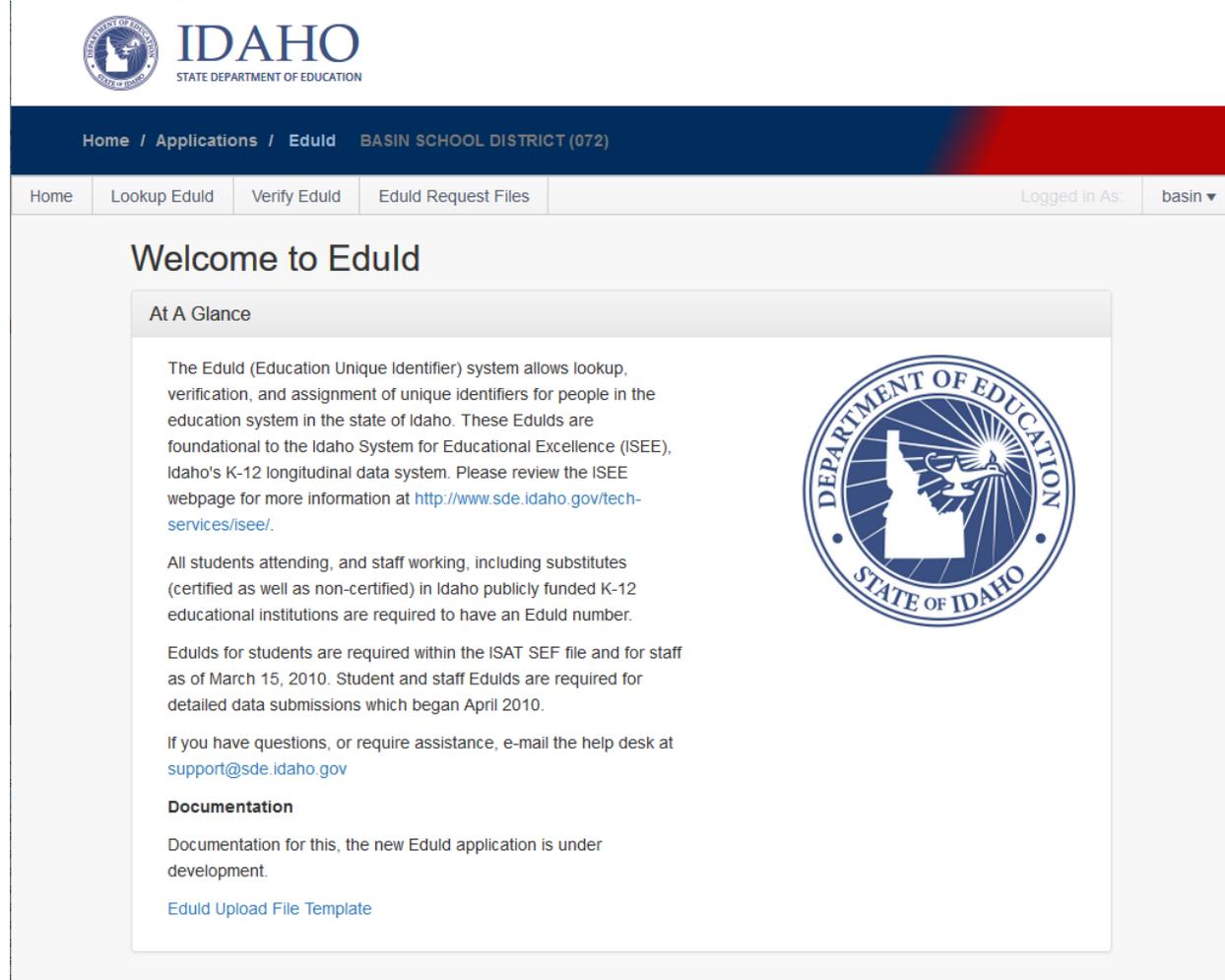
SDE Applications Portal Page
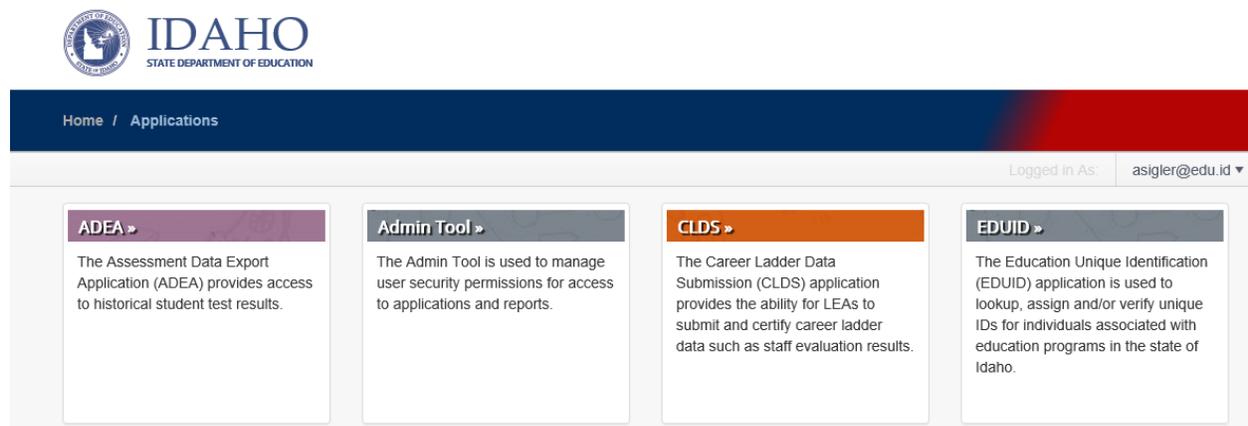
This is a single landing page where the user accesses the application(s) he/she is authorized to use. The list of authorized applications varies between individuals based on their roles and responsibilities, as well as their school district, charter school, or school structure.
- Click "EDUID" to be directed to the EDUID application page.

OVERVIEW OF THE EDUID APPLICATION

Important: Your browser (Chrome, Edge, Firefox, etc.) or window size may alter your view of the application from the images below.

Welcome page of the EDUID application

The EDUID application has three functional areas:

- Lookup EDUID – By entering information that closely matches an existing record, a resulting EDUID or result indication of multiple matches are immediately returned.
- Verify EDUID – By entering information that closely matches an existing record, an EDUID can be verified, If the match is close enough, the results will indicate how it aligns with the EDUID record.
- EDUID Request Files – using the template, multiple EDUIDs can be submitted through a csv file to batch process EDUID requests and creations.

LOOKUP EDUID

The EDUID application provides the ability to request a single EDUID after providing accurate demographic data including Given Names (first and middle), Family Names (last name), Birth Date, and Gender. The Name Guidance document, found on the ISEE homepage under Program Information, provides more detail on gathering names from legal documents.

- Use full legal Given Names including middle name (if it exists)
- Do not use nicknames
- If the student's legal last name is explicitly defined and contains more than one name separated by a space, enter those names, but do not hyphenate unless hyphens are present on the legal document.
- Zip Code and Recent School# are optional and may be used to help narrow results.

Important - Suffixes such as Jr. are entered as part of the Given Names rather than the Family Names.

Lookup EDUID page

After entering Given Names, Family Names, Birth Date, and Gender, click the Lookup button.

The application will display the name and EDUID of a person it believes matches the information given. You can use the displayed EDUID.

Lookup EDUID Search with close enough match

If a close enough match is found, the results will display the known ISEE demographic with the resulting EDUID in green. If, as in this example, the given name is within an acceptable variance, the results will indicate how ISEE has the name stored. Here, a match was found even though the Given Name(s) field did not match exactly and result indicates what ISEE has for name, "John William Jr." instead of the submitted "John William" in the search field.

If the demographic information submitted matches multiple records or the results are close but not enough to return a single match, the results will indicate this by stating a definitive match could not be found in blue. A button will also be available to create a new EDUID if you are sure you have the demographic information correct and complete.

Lookup EDUID Search without a definitive match

If the demographic information submitted does not closely match an EDUID record, a response of "No match found" will be returned highlighted in yellow.

Lookup EDUID Search with no match

If you know the person was previously a student or employee in another district and should have an EDUID, you should verify the demographic information and either:

- Click **Clear** and correct the data
- Submit an OTIS ticket to correct the SDE database based on verified, legal documentation.

In some cases, the user's information will not yet be in the database such as kindergarten students, students moving in from out of state that have never attended school in Idaho, new teachers, new volunteers, etc. In this case, the user should verify that the data entered is correct based on verified, legal documentation. If it is correct, click the **Create New EDUID** button to generate an EDUID for that person.

If you are searching for someone who you know was previously an Idaho student or staff, but cannot retrieve a matching EDUID, DO NOT CREATE A NEW EDUID. Contact SDE Support for assistance.

VERIFY EDUID

At times, you may need to verify that the information you have about an individual is correct. The verify link is designed to assist you with this. Enter the EDUID and complete the other fields just as you would to request an EDUID. Required fields include EDUID, Given Names, Family Names, and Birth Date. Full names are preferred, including middle name and both family names if they exist.

Verify EDUID

If the information entered matches a record in the database, the name and EDUID results will be displayed including the variance of the record compared to the search criteria.

If the data entered DOES NOT match a record in the database, the results will be displayed as shown below indicating an EDUID match could not be verified. Notice in this case, the Birth Date is incorrect and that is enough to result in no verification match.

Verify EDUID with no match

STOP

If you are searching for someone who you know was previously an Idaho student or staff, but cannot retrieve a matching EDUID, DO NOT CREATE A NEW EDUID. Contact SDE Support for assistance.

EDUID BATCH PROCESSING USING EDUID REQUEST FILES

By using the provided template to upload multiple student and staff information, you are able retrieve matching EDUIDs and from those results, troubleshoot data errors and/or create EDUID records for new students or staff with verifiable, legal documentation.

The EDUID Request Files allows a batch upload of student and staff information and a download of resulting EDUIDs. The Upload Request File button will assist you in navigating to the file of names you saved in the template file on your computer, uploading the file to the EDUID application, and the downloading of a results file after the EDUID batch retrieval/assignment process. As long as you create your file from the file template, the batch process will validate the format, match names with names already in the system, and you'll have the option to create EDUIDs for those that are not in the ISEE system.

History and Results Window

In the layout of the EDUID Request Files there is a link to the template file in the top center. After you have added date to the template and saved it to your computer, the Upload Request File button in the top right will open the file browsing tool to locate your updated template and upload it to the application.

Included on this screen is a history of previous uploads indicating the filename, number of rows in the submitted file, number of errors or warnings that resulted from validating the file, whether the system was directed to create EDUIDs for identities that did not already have an EDUID match, the status of the submission and the results that can be downloaded, deleted, or matched with existing EDUIDs. Additionally, there is an indication if the results were downloaded and who/when the submission was uploaded to the application.

CREATING AN UPLOAD FILE

Create a CSV (comma separated values) file containing individual student or staff information from your district data systems (i.e. Student Information System, HR System etc.) using or based on the template. You must save the file to use the upload function so save the file to a location you can easily find. Below is an example of the provided EDUID Upload Template loaded into Excel.

EDUID Template Headers

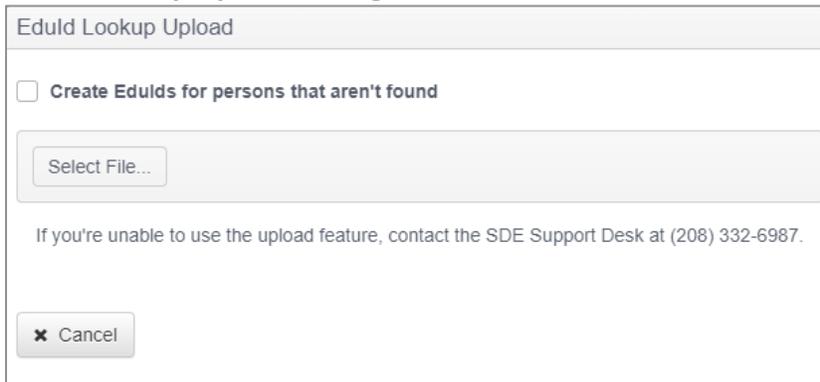|	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	LocalPersonId	EduId	FirstName	MiddleName	SuffixName	LastName	BirthDate	Gender	LastSchoolCode	ZipCode	AltLastName1	AltLastName2	AltLastName3	AltLastName4
2														

In the provided template, there are tooltips on each field that, in Excel, will give additional information on that column including if data in that field is required. **FirstName, LastName,**

BirthDate, and **Gender** are fields that require data. The rest assist in the matching of existing EDUIDs and the **LocalPersonId** is provided to store your local system person identifier information. You must save as a CSV file to upload the file to the system.

SUBMIT A FILE TO THE APPLICATION

When you have saved your completed CSV file, click the Upload Request File button. A dialog box will come up that enables you to browse for the saved file.

EDUID Lookup Upload Dialog Box

In this dialog box, you are given the option to create EDUIDs for entries that do not match an EDUID in the ISEE System. It is important to be careful not to create duplicate EDUIDs for individuals who already have an EDUID. For instance, requesting a new EDUID for a teacher who already has one will create an EDUID that is not associated with their credentials and will cause multiple errors regarding certification. A good practice is run the file once to see errors and warnings as well as observe the list of non-matches. Confirm with legal documentation and use the full legal name to the greatest extent possible to avoid creating duplicate EDUIDs.

Examples of legal documentation include:
- Birth Certificate
- Court Document
- Marriage Certificate
- State Driver's License
- State Issued ID
- Tribal Identification

When you are confident that the non-match entries in your file require new EDUIDs, check the box **Create EduIds for persons that are not found** and those new EDUIDs will be returned to you in the result set.

Press the **Select File…** button to browse to your file and select for upload. The process will automatically upload your file and respond with a result indication that includes any errors, warnings, or success.

Example of Errors or Warnings
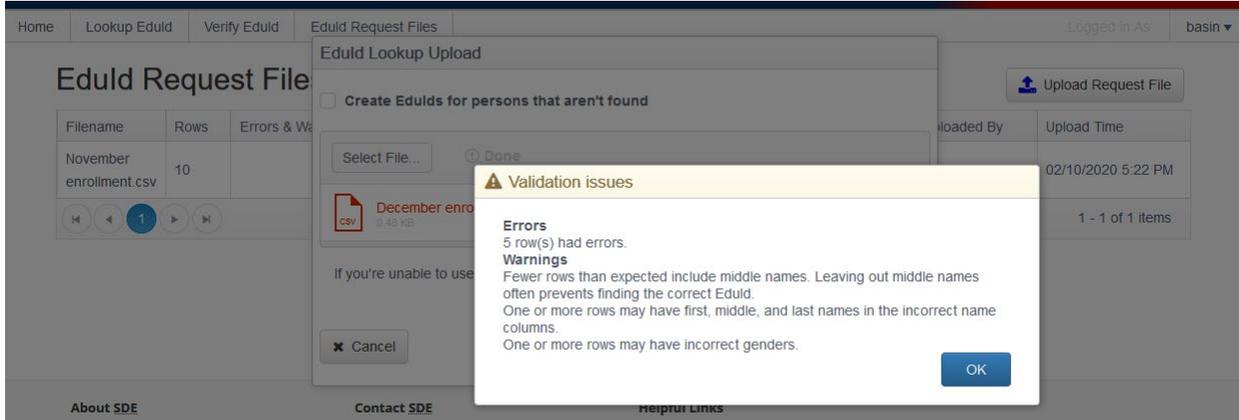
Important: If you are unable to use the upload feature because of browser limitations or system/network issues, contact the SDE Support Desk at (208) 332-6987 or start an OTIS ticket.

SUBMISSION HISTORY AND RESULTS WINDOW

After each submission to the EDUID application, a result is displayed in the results window that not only identifies who submitted what, but also the results of that submission. If there are errors or warnings, the result set of EDUID matches, and whether the result set has been downloaded are all indicated in this window.

History and Results Window

Filename	Rows	Errors & Warnings	Create	Status	Results	Downloaded?	Uploaded By	Upload Time
December enrollment corrected.csv	10		No	Matching Complete	⬇ Results	No	basin	02/10/2020 5:31 PM
December enrollment.csv	10	⬇ 5 Errors/ 2 Warnings	No	Data Problems	👥 Match 🗑 Delete		basin	02/10/2020 5:29 PM
November enrollment.csv	10		No	Matching Complete	⬇ Results	Yes	basin	02/10/2020 5:22 PM

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By clicking on the Errors/Warnings button, you will download the file you submitted with 2 new columns appended to the beginning indicating Warnings and Errors that the system encountered. Errors/Warnings may include file header problems, missing required fields, etc. Review the errors and warnings to resolve the issues with those records.

If there were rows that did not include errors and warnings, under the results column in the results window, you can click on Match and the system will process those rows and return EDUIDs that have matching demographic records in the ISEE system.

If there are no errors or warnings, a result set of matching EDUIDs and any new EDUIDs you requested to be created can be downloaded and reconciled with your information system.

Important - a good practice is to submit a file without creating new EDUIDs first, and thoroughly confirming demographic information with legal documents for non-matches. After confirming new EDUIDs are required, submit the file with the checkbox to create new EDUIDs and the result set will include new values that now exist in the ISEE EDUID database.

DUPLICATE EDUIDS OR INCORRECT DEMOGRAPHIC INFORMATION

Sometimes, despite thoroughly checking with legal documentation, duplicate EDUIDs are created. Or, you may discover that some demographics are incorrect - perhaps a nickname was used, or the wrong birthdate was submitted when the EDUID was created. Confirm with legal documentation and submit these errors or merges in an OTIS ticket to the SDE.

Directions for submitting an OTIS ticket can be found on the ISEE homepage under the Training tab. Please include the name, date of birth, and gender for the people in question and the action you are requesting (merge, DOB correction, name change, etc.).

ASSISTANCE

SDE Tech Support
    Support@sde.idaho.gov
    208.332.6987