

About iMATCH

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- •System compares enrollment information from Infinite Campus and DSS data nightly
- Identical entries between the two files are matched, and listed on the corresponding school district list

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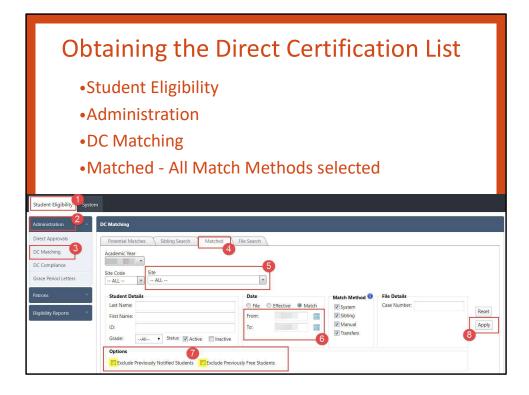
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Features to Cover

- •Obtaining Direct Certification List
- •Direct Certification Notification Letters
- •New Match Notification Email to SFA
- •Determine daily change of Direct Cert List
- •Direct Certification by school site
- •File Search feature
- •How to use the Potential Matches tab

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We will be covering a few basic topics in the training, as displayed.



We will first touch on how to obtain the direct certification list for your SFA, or school district.

After logging in, select Student Eligibility, Administration, and then DC Matching.

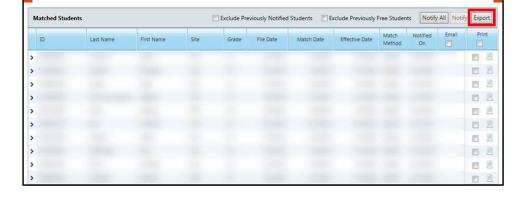
- Click the Matched tab.
- f preferred, you can use the Site Drop Down to only display a single site, or leave as All to have results for all sites display.
- Next, you can use the Date Range to zero in on student matches made within a particular timeframe, or leave blank to display all current matches.
- Be sure to un-check the two Exclude checkboxes in order to make sure that all students would display.
- Click Apply when ready.

After clicking apply, the system will display all students in your SFA that are identified as directly certified for free meal benefits that correspond with the options specified.

The following slide will discuss how to export the direct certification list into Excel format.



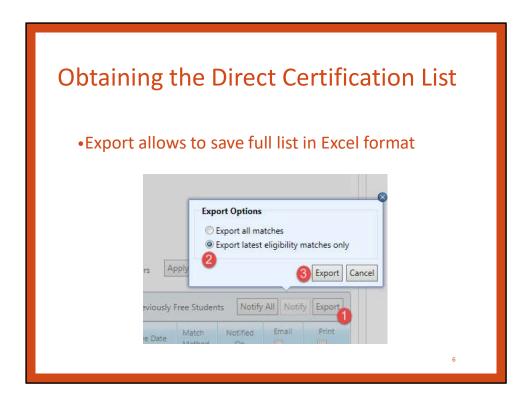
•Export allows to save full list in Excel format



After getting your direct certification list, schools are able to export the information. Export allows to save full list in Excel format

- This may be helpful for electronic point of service system uploading. Discuss with your school's technology coordinator.

We will continue on the following slide.



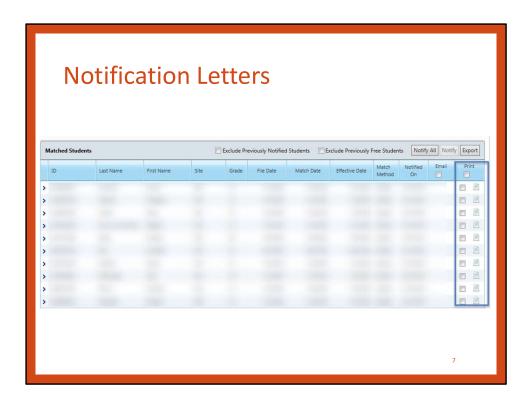
After clicking 'Export' an 'Export Options' window will appear.

Select the radio button indicating 'Export latest eligibility matches only'. This will allow for your export to capture the most updated benefit information and will limit to a single entry display per student.

For explanation purposes, we observed that some schools would previously receive multiple student records displayed in the direct certification export – this can be due to students transferring in to the district or if a household is considered as eligible for TANF at one point of the year, and later qualifies for SNAP

Using the 'Most recent matches' button will ensure the most updated student eligibility is exported.

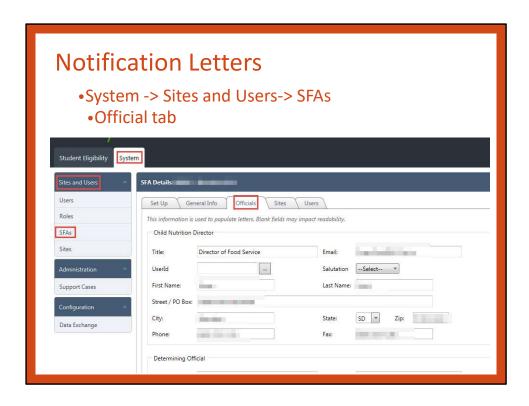
We will touch on notification letters on the following slide.



Going back to our Direct Certification list, the software has capability to generate notification letters. These notification letters can be printed in full, or individually. The letters can be printed by clicking on the Paper icon to the right of the student's name.

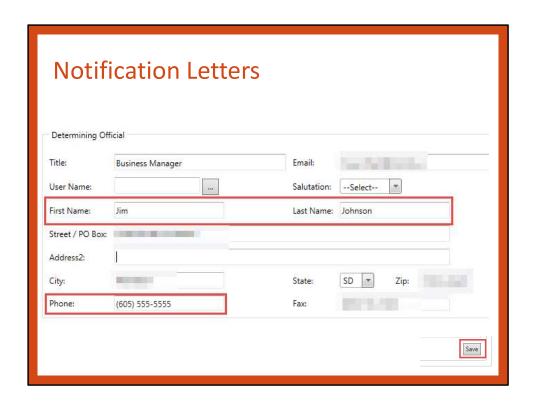
Please note – only use these notification letters if your agreement with CANS has identified that these letters will be used.

We will touch on how to set up your official fields for notification letters within the system on the next slide.



If you are going to use the automated letters to notify households of direct certification benefits from the iMATCH system, select System at the top, then click Sites and Users. Next, click SFAs. You will next click the 'Officials' tab.

We will look closer on the next slide.



Now that you are on the Officials tab, scroll down the page, and add information as needed. Remember, you would only need to do this if your SFA is planning on using the automated notification letters, and have indicated as such in your annual agreement with CANS.

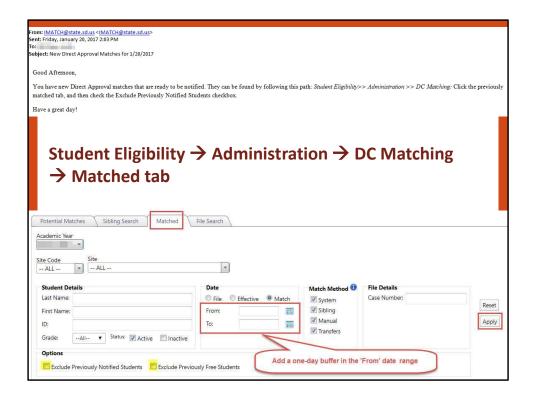
Only the Determining Official information would need to be completed, as the iMATCH system is not set up for any processes other than Direct Certification. Remember to include a phone number, in the event of a household needing to contact the school regarding the addition of a student to the household or refusal of benefits.

When you are completed providing information for your determining official, scroll to the bottom, and click Save.

The determining official's information provided in iMATCH will be automatically populated on the Direct Certification notification letters. Remember to include the same Determining official name in your annual iCAN application, for consistency.

If you are using the notification letters from iMATCH, it is suggested to look at the Print Preview prior to printing. Your school computer administrator may need to install a plug-in. If you run into system problems, contact PrimeroEdge may be of some assistance.

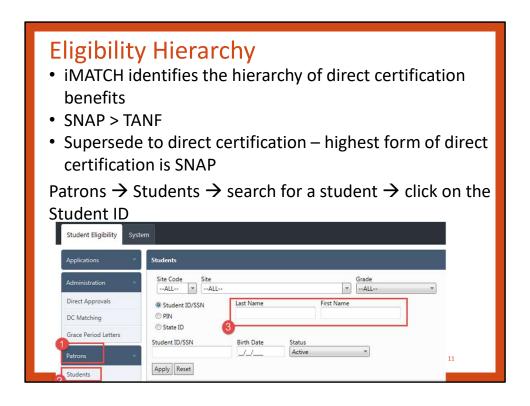
We will circle back to the Direct Certification List on the following slide.



The iMATCH system has a notification email, which sends a basic notification to all users in your SFA when a new match has been determined. The notification is not specific, but is to be used as an alert to check the system. Use the date range feature from the Matched tab to observe the new matches.

Be sure to uncheck the Exclude checkboxes again, and use the date modifier to zero in on the new match. Due to one file being 'scanned' before midnight and the other file being 'scanned' after midnight, add an extra day on the front-end of your date range for best results.

If you have multiple school employees with an active iMATCH User ID, back-up users may consider reaching out to their technology coordinator to set up an email rule for automatic filing of these notifications. This said, it is still important for the primary user to keep an eye on these email notifications, and update the schools benefit issuance accordingly.



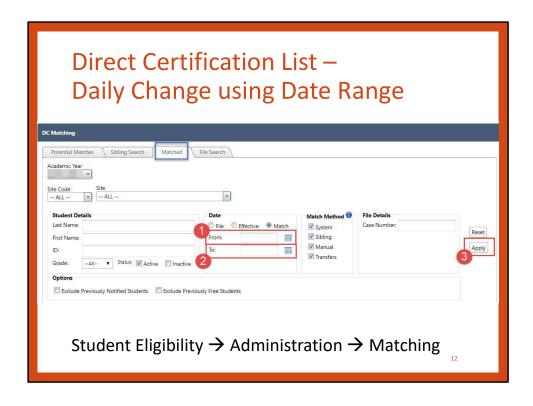
One design aspect of the iMATCH system that we haven't really discussed before is IMATCH identifies the hierarchy of direct certification benefits for the assistance programs that it has access to.

- The system has access to SNAP and TANF although these are commonly lumped together since they both yield free meal benefits, they are two distinct assistance programs for households.
- SNAP is considered the highest form of direct certification we would always want to supersede to direct certification whenever available, but to take it a step further, supersede to SNAP.

Please keep this in mind, as a student may be matched with TANF early in the year – as the year goes on, if the student is matched with SNAP, you will receive an email alert.

You can see a student's historical data for eligibility, which can come in handy for situations like this.

Patrons \rightarrow Students \rightarrow search for a student \rightarrow click on the Student ID \rightarrow Click the Eligibility tab to see historical data



Here, we are back on the Matched tab, found in Student Eligibility -> Administration - > DC Matching.

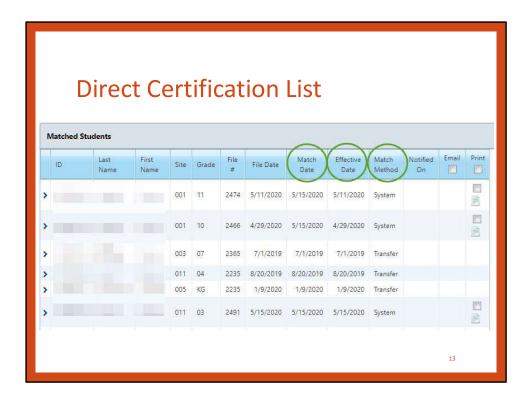
As previously described, the 'Matched' tab also features a date range. Use the date range feature from the Matched tab to observe the new matches.

You can adjust the date range to determine when newly matched students are eligible. When using the date range, it is suggested to add an extra day to the 'From' box and the 'To' box, to ensure that you are capturing the information that you are looking for.

After a date range is entered, click apply.

The list of students displayed would come from only the date range identified.

We will show another organizing feature on the following slide.



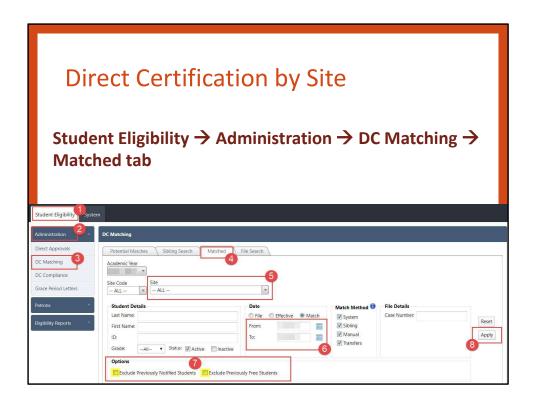
If you would prefer not to use the date range modifier, you can instead sort by columns from the Matched tab.

Here, you can click any of the columns in blue, to sort. Some SFAs may find it helpful to sort by match or effective date. The way that our software is set up, the Match Date and Effective Date will typically be the same date.

Hypothetically speaking, you could sort by the Match date, and scroll through the list, from the earliest matches up to the most recent matches. The File Date denotes the first time that the student appeared on the DC file. This can be beneficial when determining start date of eligibility. Be sure to review your annual agreement with CANS on whether you would use the File Date for the start of benefits, or the date that you observed the match within the system.

Using the Matched tab is the suggested method to observe a district-wide list of students that have been matched in the iMATCH system, as this also contains a drop-down menu if you prefer to select a specific site within the district.

That said, we will show another method that can be used to observe a list of students broken down by <u>site</u> that have been matched.

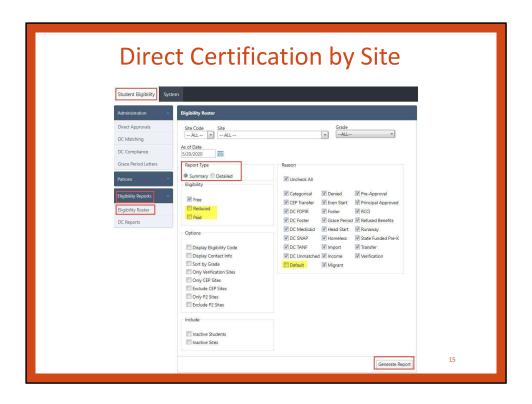


Just to re-iterate how to do a particular task – this is probably the easiest way to identify a list of students receiving benefits per a specific site within your School Food Authority.

Go to the Matched tab, as we have previously discussed.

Before selecting 'Apply', use the Site drop-down arrow to select a specific site, marked by #5 in the displayed image. Now, when you click 'Apply', you will bring up a list of directly certified students that enrolled at the selected site.

We will look at another way to obtain this information on the following slide.



Using the Eligibility Report, you are also able to obtain a list of directly certified students enrolled per site.

Additionally, this method also includes Foster, Homeless, and Migrant matches, although the CANS office typically is only able to receive these matches once per year.

As we can see, there is also a site modifier at the top of the screen, if you wanted to change the report to one specific site.

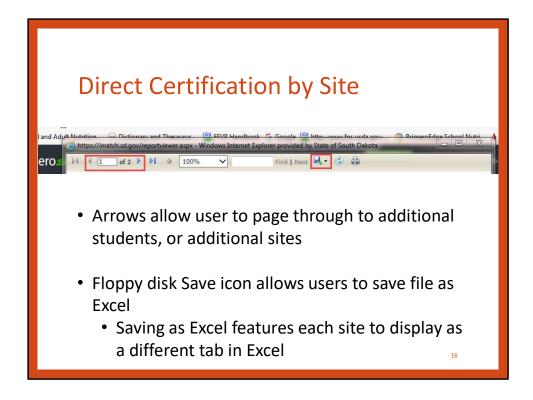
Report Type radio buttons were added. The 'Summary' selection would only display a student count, whereas the 'Detailed' selection would display the full listing of each individual student.

Next, in the Eligibility box, as stated on the previous slide, you will want to make sure to 'un-check' Reduced and Paid.

Also, in the Reason box, you will want to make sure to 'un-check' Default, as Default is defined as Paid in the system.

We have highlighted the boxes to un-check. Once you have un-checked the necessary boxes, click 'Generate Report' in the bottom right corner.

After you click 'generate report', an additional window will be displayed. You can page through to find the different site reports. More on the following slide.

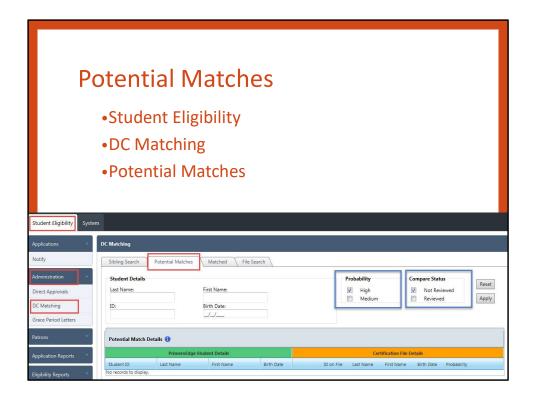


- Arrows on the generated report allow the user to page through to additional students, or additional sites
- The Floppy disk Save icon allows users to save file as Excel
 - Saving as Excel allows for each site to display as a different tab in Excel
 - If you intend on looking at sitebased direct certification data, I

would suggest saving the document as an Excel document, as the list is more manageable and user-friendly.

Typically, SFAs with meal count software will use the full SFA-wide direct certification list found in the Matched tab, however, this site-based report may be helpful for schools using a manual meal count method, when eligibility is applied to student counts in the office afterward.

We will look at some additional features on the following slide.



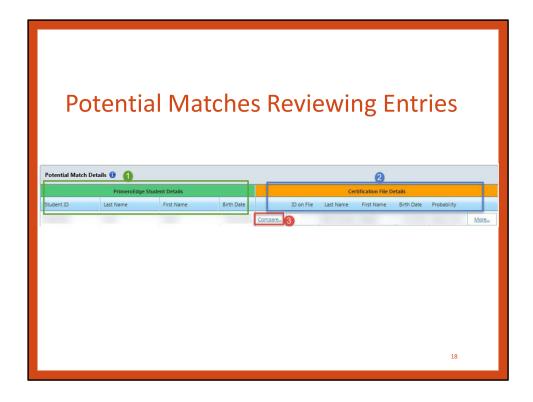
The iMATCH system matches enrollment information from Infinite Campus with students identified from Department of Social Services that receive benefits. Various criteria between the two files is automatically compared. Criteria have certain 'points' assigned, for scoring an automatic match. When the comparison of the two files reaches 44 points, an automatic match occurs.

If the comparison of enrollment file and direct certification file result in a high point score, but not high enough to make an automatic match, the comparison of files can be found in the Potential Matches tab.

The first name, last name, and date of birth must match perfectly to get a 100% match. Students do not match 100% if there is a slight difference in the student's Infinite Campus record and the SNAP or TANF benefit information.

The Potential Matches tab features a probability ranking, which provides the likelihood that a student listed from DSS match a particular student entry from the enrollment information listed in Infinite Campus list for your school.

Prior to observing your list, you can select High and/or Medium probability to observe. Additionally, if a user has already reviewed particular entries in the Potential Matches tab, the 'Compare Status' checkboxes allow the user to only display entries which have not yet been reviewed.



As previously indicated, the Potential Matches list provides a list of students that have a high probability of matching, but did not meet the required amount of points for an automatic match to occur.

It is best practice to observe the High-probability student files first. Make sure that the 'High' probability checkbox is checked, then click apply.

The system will now only display student files that have a high probability of matching.

The column on the left, labelled 'PrimeroEdge Student Details' (identified on the slide by the green border and number 1) is the enrollment file from the school's Infinite Campus.

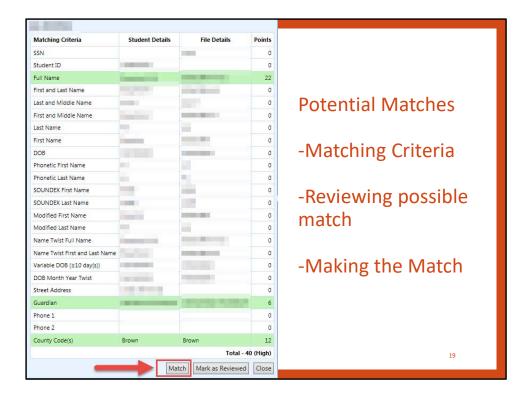
The column on the right, labelled 'Certification File Details' (identified by on the slide by the blue border and number 2) is the Direct Certification file from Department of Social Services.

The iMATCH system has made a comparison between the two files, and determined that the enrollment file on the left, and the direct certification file on the right, have very similar student data, but not similar enough for an automatic match to occur. This is where you come in.

You will see a link toward the middle of the two lists, labelled 'Compare'. This link is identified on the slide by the red border, and number 3.

When we click the 'Compare' link, the user will be able to look at specifics between the Enrollment file from the left side, and the Direct Certification file from the right side.

We will look at more detail on the following slide.



Here, we can see the 'score card' displaying the matching criteria, and comparing the student enrollment information with the direct certification information.

Since we are handling sensitive data, we do need to redact specific information for the purposes of this training.

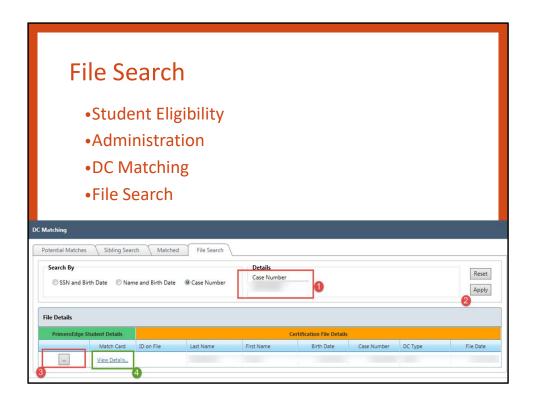
We can see that the Student Details (also known as the enrollment information from Infinite Campus) and the File Details (also known as the Direct Certification File from Department of Social Services) have some consistent fields. The fields highlighted in green are consistent between the two files.

Only the school can know for sure if these two entries are the same student. If this is the same student, the data files can be manually matched. We will discuss more on the following slide.

If the school has determined that the student identified in the enrollment file from the Student Details column is the same student as the student identified in the direct certification file from the File Details column, the school can make a manual match.

In order to make a manual match, the user would click the 'Match' button displayed toward the bottom of the scorecard – identified on this slide by the red border, and red arrow.

The user also has the capability of marking the student as 'reviewed'. Marking a student as reviewed could be used if the user has identified that the student files displayed are not the same student.



Schools can use the 'File Search' tab to locate students to determine if they have benefits.

The File Search tab can be found in the same section as the Matched tab – click Student Eligibility, Administration, DC Matching, and then click File Search.

Select the radio button which you wish to search by.

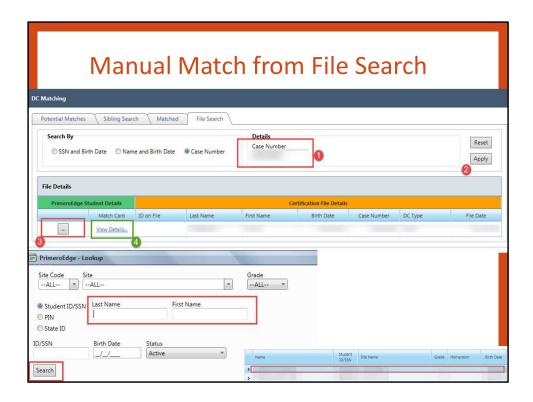
Schools commonly use this feature to validate Case Numbers written on applications, however, we have recently been informed that all search categories conduct statewide searches.

As a reminder, the school is to provide categorical benefits at face value when a sensible case number is provided on an application. If the school chooses to validate the case number in the iMATCH system, the student's eligibility can be considered as 'directly certified', which can extend to other enrolled children in the household. If the case number cannot be found in the system, the school should follow up with the household.

An additional note – the full case number must be entered in the File Search. Case numbers in South Dakota are 9 digits long, and always have at least 1 lead-zero. So, for example, If a household provided a six-digit case number on a household

application without any lead-zeroes, you may need to enter three lead-zeroes, and then the case number provided.

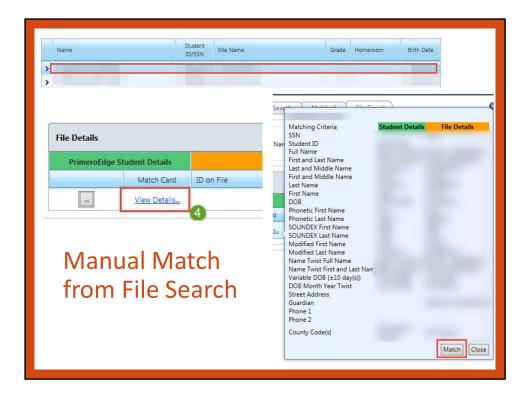
We will discuss how to make manual matches from the File Search tab on the following slide.



If you would like to make manual matches from the File Search tab,

- First, enter the search data (such as a case number) and click 'Apply'; You may see an ellipses (3 dots) in the Student Enrollment details (as seen by number 3)
- Click the ellipses to bring up the Student Lookup page. This is where you are identifying which enrolled student to compare to the direct certification list
- Consult your student enrollment, and make sure to enter the student name which corresponds with the name identified in the Certification File Details.
- -After typing in the student name, select the name from the results list below, turning the students name blue, then click OK.
- These steps tell the system which enrolled student you wish to compare with the direct certification file details.

We will continue on the following slide



After we have selected the enrolled student which we feel is potentially the student identified in the Direct Certification File details (from the orange header), we will click 'View Details' back from the File Search page.

'View Details' brings up the scorecard, which you may remember from the Potential Matches tab.

Here, we are able to compare the Student Enrollment File with the Direct Certification File, to make a logical decision on whether we should match the student files.

If you are sure that the enrolled student in the Student Details list is the same student as the student identified in the Direct Certification list, you may click the Match button.

Remember to make sure that you are updating your point of service system to reflect proper student eligibility.

Thank you!

•CANS Office: 605-773-3413

•CANS Email: DOE.SchoolLunch@state.sd.us

•PrimeroEdge Customer Support: 1-866-442-6030

•PrimeroEdge Email: support@primeroedge.com



We have covered a lot of material today. Please feel free to contact the CANS office or PrimeroEdge with any questions.



Don't forget to record your training hours. This is the certificate you can print off if you took this class on your own. In class, since we had discussion time, your training credit will reflect the actual time spent learning about this topic.

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(3) Email: program.intake@usda.gov.

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