

South Dakota iMatch/PrimerEdgeTraining

Confidentiality Requirements

Section 9(b)(6) of the NSLA,(42 U.S.C.1758(b)(6), regulations found at 7 CFR Part 245.6 delineates the restrictions on the disclosure and use of information obtained from an application for free and reduced price meals, as well as the criminal penalties for improper release of information. While the law discusses applications, the disclosure requirements also apply to information obtained through the direct certification process.

Disclosure means revealing or using individual children's program eligibility information that is obtained through the free and reduced price eligibility process for a purpose other than the purpose for which the information was obtained. Disclosure includes but is not limited to access, release, or transfer of personal data about children by means of print, tape, microfilm, microfiche, electronic communication, or any other means. It includes eligibility information obtained through the free and reduced price application or through direct certification and whether the children are eligible for free meals or reduced price meals.

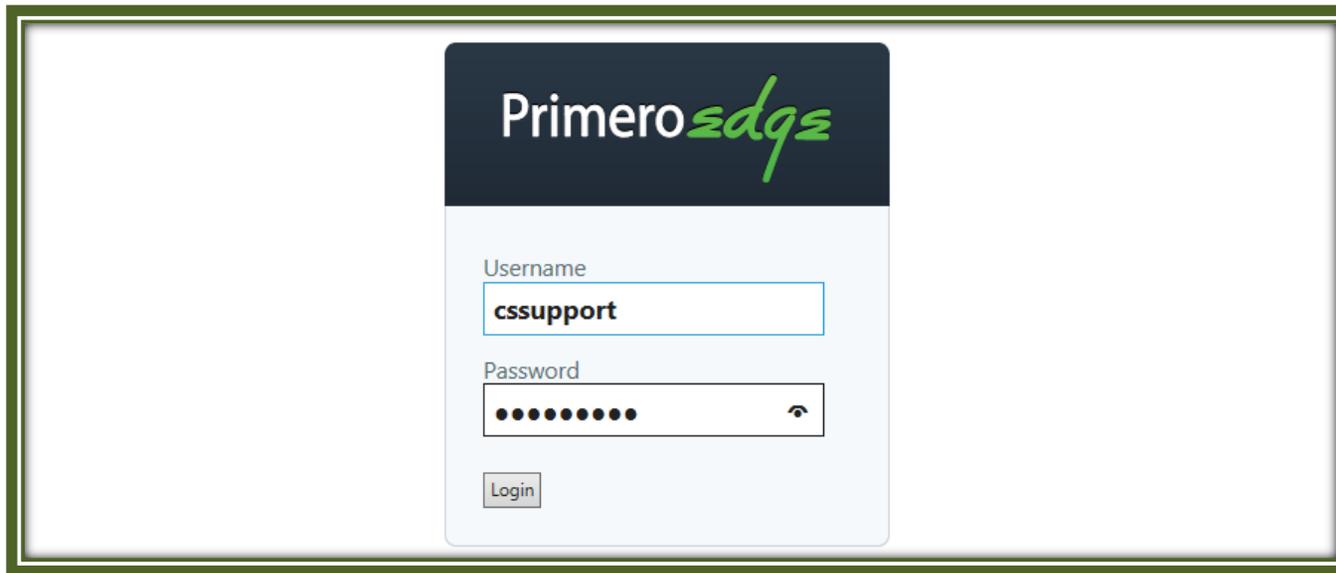
For more on Disclosure information please see the Disclosure Chart in the Eligibility Manual. http://www.fns.usda.gov/sites/default/files/cn/SP40_CACFP18_SFSP20-2015a.pdf

South Dakota iMatch/PrimeroEdgeTraining

Navigate to the following webpage - <https://imatch.sd.gov/login.aspx>

Logging In

Type in your username and password and log in to PrimeroEdge.



The screenshot shows the PrimeroEdge login interface. At the top, the logo 'PrimeroEdge' is displayed in white and green text on a dark blue background. Below the logo, there is a light blue login form. The form contains two input fields: 'Username' with the text 'cssupport' and 'Password' with ten dots. A 'Login' button is located below the password field.

- Usernames are usually FirstnameLastname.
- Passwords must have 10 Characters including a special character and a number.
- Should you lose or forget your username or password please contact DOE.SchoolLunch@state.sd.us
- Please put iMATCH in the subject line of the email.
- Please include a signature block in your email, or your school district/agency name.

TIP: PrimeroEdge Customer Support is unable to reset passwords for security reasons; this must be requested through the CANS office.

Dashboard

This is the main screen you will see every time you log in to PrimeroEdge.

- The Dashboard can be clicked on from any screen once logged in to PrimeroEdge in the upper right hand corner. The Dashboard includes announcements and messages in the center.
- Announcements are links that can be clicked on to get to the information inside, please check for new items when you log in.
- This example shows the notice of a Webinar. The notice is a link you can click on to get to the additional details for each announcement.

The screenshot shows the PrimeroEdge dashboard interface. At the top, there is a navigation bar with the logo on the left, the user name 'Amigo' in the center, and the district name 'EDGE COUNTY SCHOOLS' on the right. To the right of the district name are four buttons: 'Dashboard', 'Messages', 'My Profile', and 'Logout'. Below the navigation bar are two buttons: 'Student Eligibility' and 'System'. The main content area is titled 'Dashboard' and contains two tables: 'Announcements' and 'My Messages'. The 'Announcements' table has columns for 'Date' and 'Title' and lists four items: 'Webinar' (6/1/2015), 'Font Installer' (5/10/2012), 'Viewing Reports/Letters' (5/10/2012), and 'User Manuals' (5/10/2012). The 'My Messages' table has columns for 'Date' and 'Title' and lists two items: 'Direct Approval #1042 processed' (5/27/2015) and 'Direct Approval #1041 processed' (5/26/2015).

TIP: The logout is in the upper right hand corner.

TIP: Amigo will always be at the top center of the page.

My Profile

The My Profile link in the upper right hand corner will allow you to update your information such as changing or updating your password that you use to login to PrimeroEdge.

Primero *sdgs* Amigo ? District Realm: EDGE COUNTY SCHOOLS | Dashboard | Messages | **My Profile** | Logout

Student Eligibility System

Sites and Users Administration Monitoring Management Configuration System Tools SIF

My Profile

User Profile	Password
User Name *: csupport	Old Password: [Redacted]
First Name *: Cybersoft	New Password: [Redacted]
Last Name *: Support	Confirm Password: [Redacted]
Middle Initial: [Redacted]	
Email: [Redacted]	
Work Phone: [Redacted]	
Cell Phone: [Redacted]	
User Status: Active	
Language: English	
Theme: Vista	

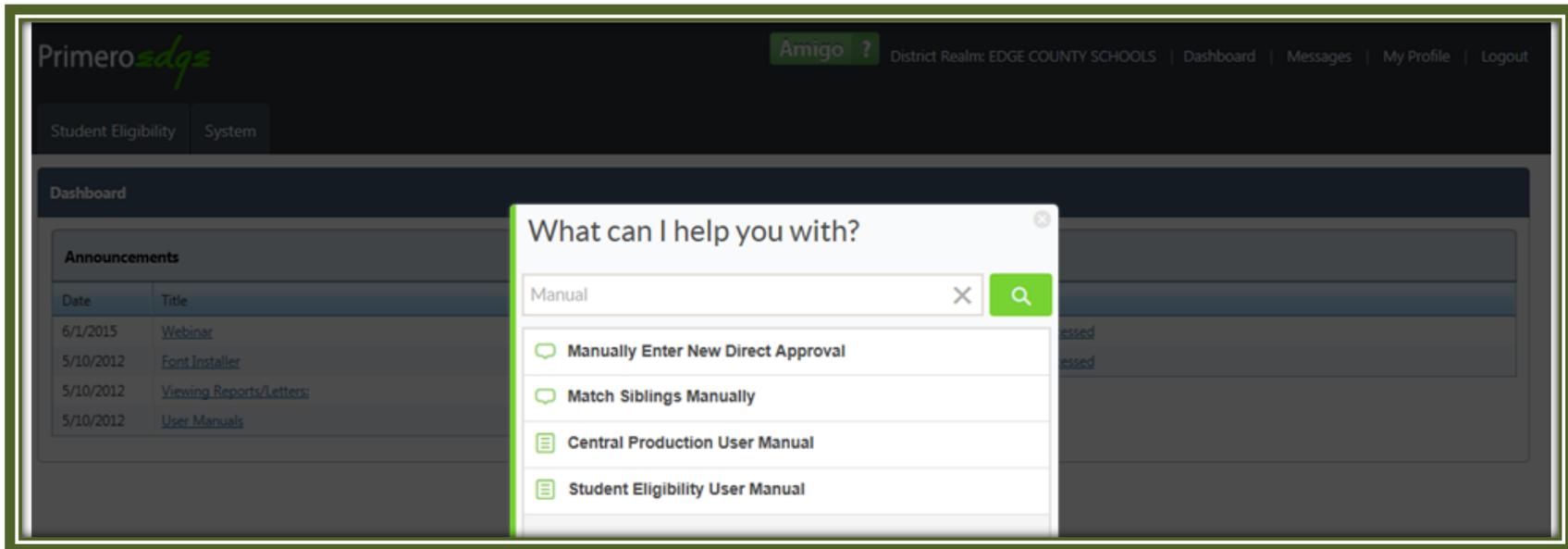
Save

TIP: Please check to make sure your email address is current because the CANS office will use this as contact information for you.

Amigo

On the top center of any screen – Amigo – your helpful guide –is there to help you.

- Amigo guides step by step through many of the most common functions you will use in PrimeroEdge. Amigo also contains the PrimeroEdge Student Eligibility User Manual.
- We will revisit how Amigo works again later, when we generate an Eligibility Roster Report.



TIP: When you search for something that isn't in Amigo, the request is saved for the software creators that a new search term and guide may be needed.

TIP: When searching in Amigo, manuals are indicated with an icon that looks like text on a page. Instructional walkthroughs are indicated with a bubble icon.

Student Eligibility Tab - Student Eligibility Home Screen

1. When you click on the Student Eligibility tab in PrimeroEdge, you will see the Student Eligibility home screen. This screen gives you a high level view as to how many Direct Certification students there are in your District, as well as your eligibility percentage.
 - Files are uploaded from InfiniteCampus (Student Information) and Department of Social Services (SNAP/TANF) each night Monday –Friday.
 - When a student transfers from one district to another it may take at least a day or possibly 2, (depending on what time they transferred) for the student to show up on the matched list.
 - The numbers on the Student Eligibility Home Screen are not static.
 - This means that as your enrollment and number of matches change, you can expect the numbers on the home screen to change as well.

The screenshot shows the 'Student Eligibility Home' screen in the PrimeroEdge system. The interface includes a navigation menu on the left with 'Student Eligibility' and 'Student Eligibility Home' highlighted in green. The main content area displays an 'Eligibility Summary' table and an 'Applications' table.

Eligibility Summary		
Eligibility	Count	Percentage
Free	20	66.67%
Direct Certification	20	66.67%
Direct Approval	0	0.00%
Income	0	0.00%
Categorical	0	0.00%
Other	0	0.00%
Reduced	0	0.00%
Total Needy	20	66.67%
Paid	10	33.33%
Not Applied	10	33.33%
Denied	0	0.00%
Total Enrolled	30	

Applications		
Entry Method	Count	Percentage
Scanned	0	
Online	0	
Manual	0	
Total	0	

Student Eligibility Tab – Administration – Direct Approvals

This screen will show you :

1. The Direct Approval ID
2. The Update/Effective date
3. The total number of students that were submitted on that file.

Approval ID	Approval Type	Status	Update Date	Effective Date	User	Total Students
1042	Direct Certification	Processed	5/27/2015 11:23 AM	5/27/2015	Cybersoft Support	9
1041	Direct Certification	Processed	5/26/2015 6:28 PM	5/26/2015	Cybersoft Support	13
1036	Direct Certification	Processed	5/26/2015 3:55 PM	5/26/2015	Cybersoft Support	2
1032	Direct Certification	Processed	5/26/2015 3:08 PM	5/26/2015	Cybersoft Support	5
1030	Direct Certification	Processed	5/26/2015 2:12 PM	5/26/2015	Cybersoft Support	1

TIP: Most of the information on the tab above applies to people working at the State level. The majority of the same functions used at the District level can be accessed from the DC Matching screen. We will be visiting that tab momentarily.

TIP: The update date tells you the last time a Direct Certification file was uploaded by the state and the total students figure is the total number of students in your district affected by that file upload.

Student Eligibility Tab – Administration - Direct Approvals – Approval Radial

1. In the Search by box choose the radial for Approval
2. Choose the approval type of Direct Certification.
3. Leave the From and To date boxes blank to see all the direct approval files that have been uploaded to PrimeroEdge or you can choose a specific date range.
4. Click Apply.

You will notice next to each of the approval ID's there is a blue arrow. Clicking on the blue arrow will give you the Direct Approval Summary. There is an update and effective date field to show when the file was processed, and a Total Students column to show the number of students that were processed on that file.

The screenshot displays the 'Direct Approvals' section of the PrimeroEdge system. The search filters are set to 'Approval' type and 'Direct Certification' approval type. The table below shows the results of the search.

Approval ID	Approval Type	Status	Update Date	Effective Date	User	Total Students
> 1042	Direct Certification	Processed	5/27/2015 11:23 AM	5/27/2015	Cybersoft Support	9
> 1041	Direct Certification	Processed	5/26/2015 6:28 PM	5/26/2015	Cybersoft Support	13
> 1036	Direct Certification	Processed	5/26/2015 3:55 PM	5/26/2015	Cybersoft Support	2
> 1032	Direct Certification	Processed	5/26/2015 3:08 PM	5/26/2015	Cybersoft Support	5
> 1030	Direct Certification	Processed	5/26/2015 2:12 PM	5/26/2015	Cybersoft Support	1

Student Eligibility Tab – Administration - Direct Approvals – Approval Radial - Continued

In the example below, the blue arrow has been clicked which when expanded - gives the summary of what changes have occurred as a result of the file.

1. This information is the same as what is found on the Summary Tab when you click on the link for the Approval ID.
 - a. There have been five students changed from paid to free as a result of this file.
 - b. At the bottom of this screen, there are asterisks and the software is letting you know that anyone previously approved, and students that are currently inactive will not show up in the matched tab in this section.
 - c. “All” matched students will be visible in the previously matched tab however, which we will be seeing later.

The screenshot displays the 'Direct Approvals' section of the Primero Edges system. The search criteria are set to 'Approval' type for the '2014 - 2015' academic year. A table lists one approval with ID 1042, status 'Processed', and 9 total students. The expanded view for this approval shows the following details:

- File Number: 1042
- Approval Type: Direct Certification
- File Status: Processed
- Status Change Date: 5/27/2015
- User Name: Cybersoft Support

The 'Eligibility Results' table is as follows:

Reason	Total
Changed from PAID	5
Changed from REDUCED	0
Changed from FREE	0
NEW Activations	0

Below the eligibility results, a 'Total Students On File' summary is provided:

Category	Count
Total Students On File	9
Unmatched Students	0
Matched Students	9
SNAP	0
Non-SNAP	5
Prior Approval *	4
Inactive *	0

* - Will not appear within Matched Students Tab.

TIP: The “new” button is for uploading Direct Certification files. This is taken care of for you by the State, so you will not ever need to use this button

Student Eligibility Tab – Administration - Direct Approvals – Matched Students Tab

1. Click on the Approval ID file number. The number is a blue link.



The screenshot shows a table titled "Direct Approvals" with two columns: "Approval ID" and "Approval Type". The "Approval ID" column contains five entries: 1042, 1041, 1036, 1032, and 1030. Each entry is preceded by a right-pointing chevron (>). The "Approval Type" column contains five entries, all of which are "Direct Certification". A green rectangular box highlights the "Approval ID" column.

Approval ID	Approval Type
> 1042	Direct Certification
> 1041	Direct Certification
> 1036	Direct Certification
> 1032	Direct Certification
> 1030	Direct Certification

2. You will see the following tabs as shown below: Summary, Matched Students and Unmatched Students.
3. Click on the Matched Students Tab.
 - d. The Matched Students Tab below – shows the 5 students that were approved as a result of this file.

Student Eligibility Tab – Administration - Direct Approvals - Matched students Tab – Continued

The screenshot shows the 'View Direct Approval' page in the PrimeroSDGS system. The page is titled 'View Direct Approval' and includes a navigation menu on the left with options like 'Applications', 'Administration', 'Direct Approvals', 'DC Matching', 'Grace Period Letters', 'Household Letters', 'Patrons', 'Application Reports', 'Eligibility Reports', and 'Verification'. The main content area has tabs for 'Summary', 'Matched Students', and 'Unmatched Students'. The 'Matched Students' tab is active, displaying a table with columns for ID, Last Name, First Name, Site, Grade, Match Date, Effective Date, and Match Method. A red button labeled 'Exclude Previous Free Students' is visible in the top right of the table area. The table contains five rows of student data.

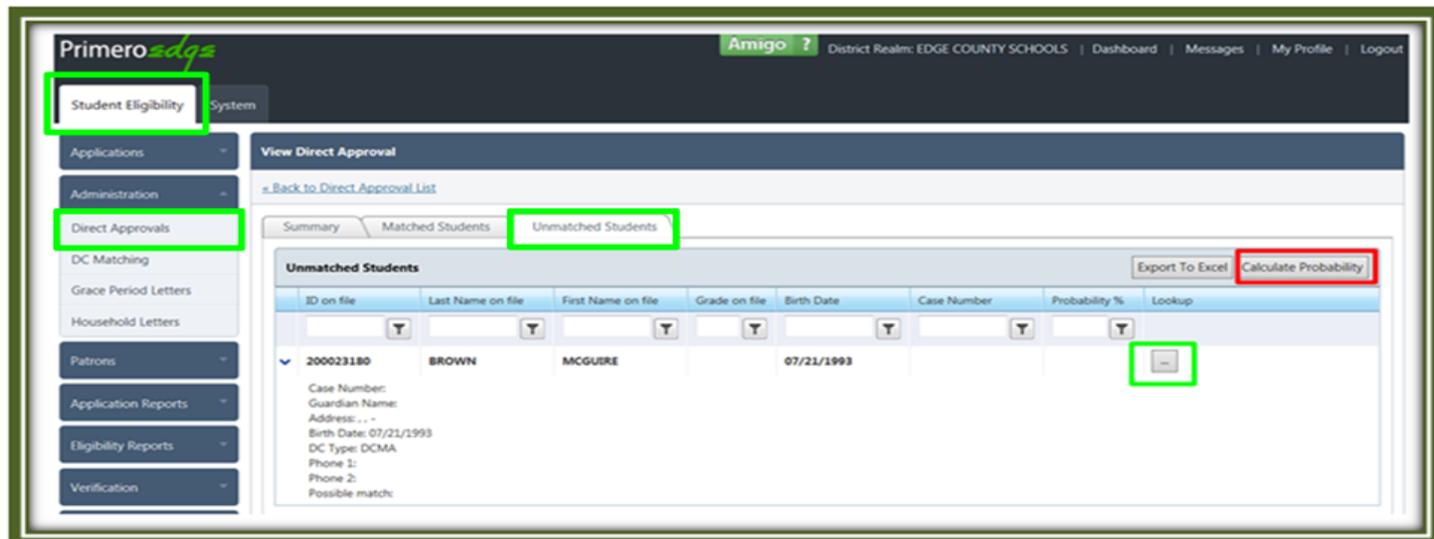
ID	Last Name	First Name	Site	Grade	Match Date	Effective Date	Match Method
> 161616	Rabbit	Brer	002	06	5/27/2015	5/27/2015	System
> 191919	Mim	Madam	002	07	5/27/2015	5/27/2015	System
> 151515	Charming	Prince	002	07	5/27/2015	5/27/2015	System
> 181818	Peep	Bo	001	06	5/27/2015	5/27/2015	System
> 171717	Lightyear	Buzz	001	03	5/27/2015	5/27/2015	System

TIP: South Dakota does not use any other DC entry types other than imported file, so the exclude previously free students button does not function as intended and can be ignored.

TIP: This information is generally used at the State level. The information that is used at the District level can also be found under the “Previously Matched Tab” which I will demonstrate later.

Student Eligibility Tab – Administration - Direct Approvals – Unmatched Students Tab

1. Click on the Student Eligibility Tab> Administration> Direct Approvals > Unmatched Students Tab.
2. The unmatched tab is a useful tool to maximize potential matches. This tab contains unmatched students that:
 - a. Have a county code listed for them in the DC file.
 - b. Then, these unmatched students will appear in the unmatched students tab for all Districts that have the same County Code specified in their District configuration, so the students can be found and matched.
 - c. Sometimes, students whose name spelling, birthdate, or other identifiable information was not exact enough for a match - in addition to having the same county code - will be found in the unmatched list.
3. Next to each student listed on the Unmatched Students Tab is an ellipse - a lookup box on the right with 3 dots inside. No lookup typing is required for this ellipse – simply click on the ellipse as shown below, and if the student is enrolled in your district it will automatically find them and pull up a box with the student information.
4. Once the student has been found, you can double click on their name and that will match the student for you.
5. The calculate probability button is no longer used, and is no longer present in the 5.8 version of the software.



Student Eligibility – Administration - Direct Approvals – Unmatched Students Tab - Continued

Click on the ellipse to the right of the student to search whether this unmatched student is a student enrolled in PrimeroEdge at your School District. No typing here is required. If the student “is” a student at your district, the student will auto - populate in the box as shown below. If they are “not” a student at your school district, you will get no results from clicking the ellipsis box below. When the student has been found as shown below -simply double click on the student to make the match.

The screenshot shows the PrimeroEdge - Lookup window. The search criteria are Site Code: --ALL--, Site: --ALL--, and Grade: --ALL--. The search results show a match for the student Brown, McGuire at Disneyworld High School. The student's details are as follows:

Name	Student ID/SSN	Site Name	Grade	Homeroom	Birth Date
Brown, McGuire	111112	Disneyworld High School	12		1/21/1999

TIP: There is nothing you need to do to make students appear in the unmatched tab. There will automatically be a list of them if there are unmatched students on the DC file that reside in the same county code for your District on the DC record. If there are no students meeting that criteria, there will be none listed here.

TIP: This same exact tab, that works the same exact way - can be found under Student Eligibility Tab> Administration>DC Matching, and this area is more useful at the District level. We will visit that tab shortly. The Direct Approvals section is more useful for employees at the State level.

Student Eligibility – Administration - Direct Approvals – Student Radial

1. Choose the radial button for Student.
2. Enter any search criteria – SSN, Student ID, the 1st initial, or the entire name.
3. Choose any site or the entire District by choosing “all”.
4. Choose whether you are looking for active or inactive students, or all students.
5. Approval Type: Direct Certification
6. Choose dates to search within, or leave blank to search all dates for the current school year.
7. Choose all match methods. (System, Sibling, Manual and Transfers) then, Click Apply.

The screenshot shows the 'Student Eligibility' interface in the 'Administration' section. The 'Direct Approvals' section is active, and the 'Student' radial button is selected. The search criteria are as follows:

- Academic Year: 2014 - 2015
- Site Code: -- All --
- Site: -- All --
- SSN / Student ID: m
- Last Name:
- First Name:
- Grade: --All--
- Status: Active
- Approval Type: Direct Certification
- From:
- To:
- Match Method: System, Sibling, Manual, Transfers

The 'Matched Students' table is displayed below the search criteria:

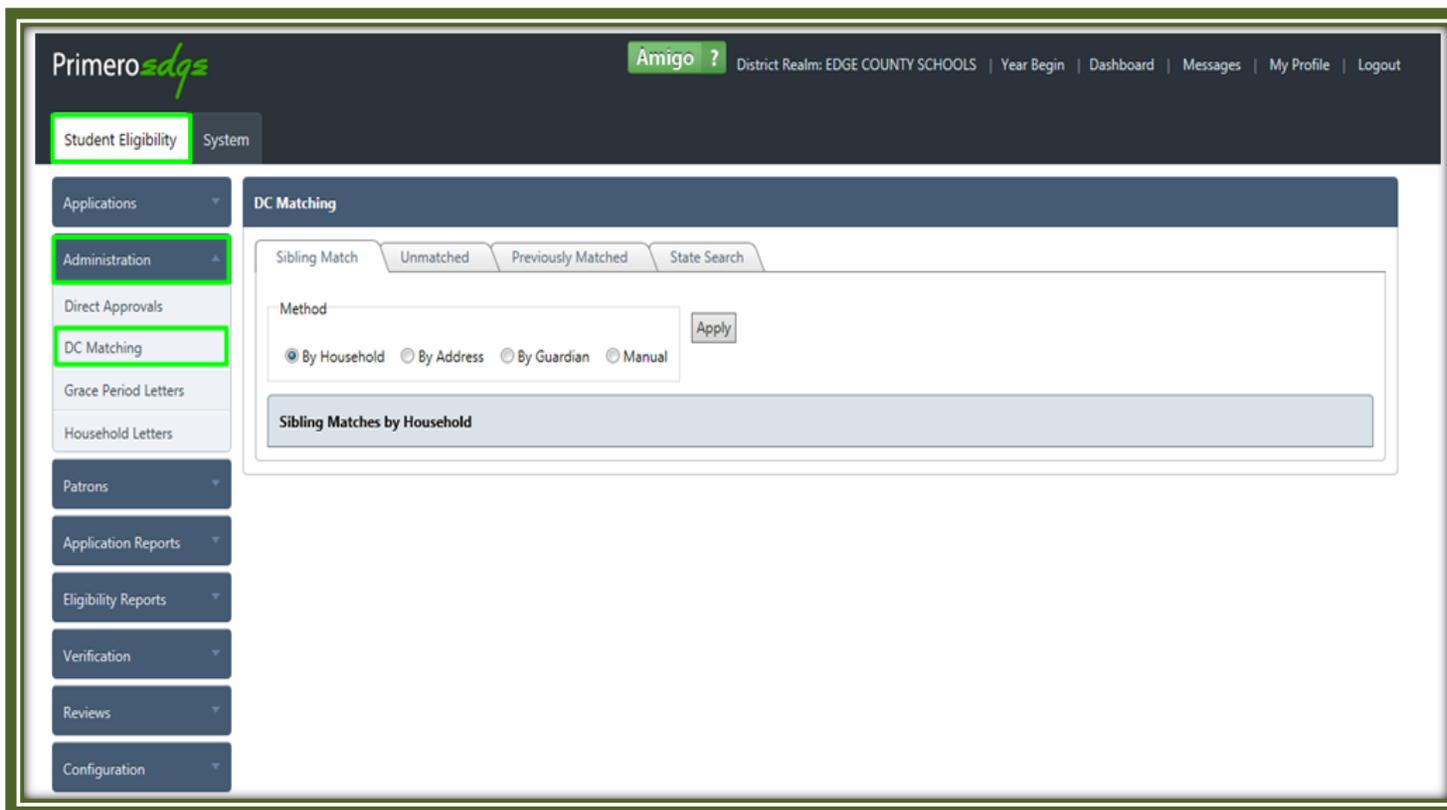
ID	Last Name	First Name	Site	Grade	Match Date	Effective Date	Match Method
> 151515	Charming	Prince	002	07	5/27/2015	5/27/2015	System
> 191919	Mim	Madam	002	07	5/27/2015	5/27/2015	System

TIP: The list that is populated from here cannot be exported from this function. You need to use DC Matching to export the list.

TIP: South Dakota does not use any other DC types other than imported file, the exclude previously free students button does not function and can be ignored.

Student Eligibility Tab – Administration – DC Matching

1. Go to: Student Eligibility Tab – Administration – Dc Matching



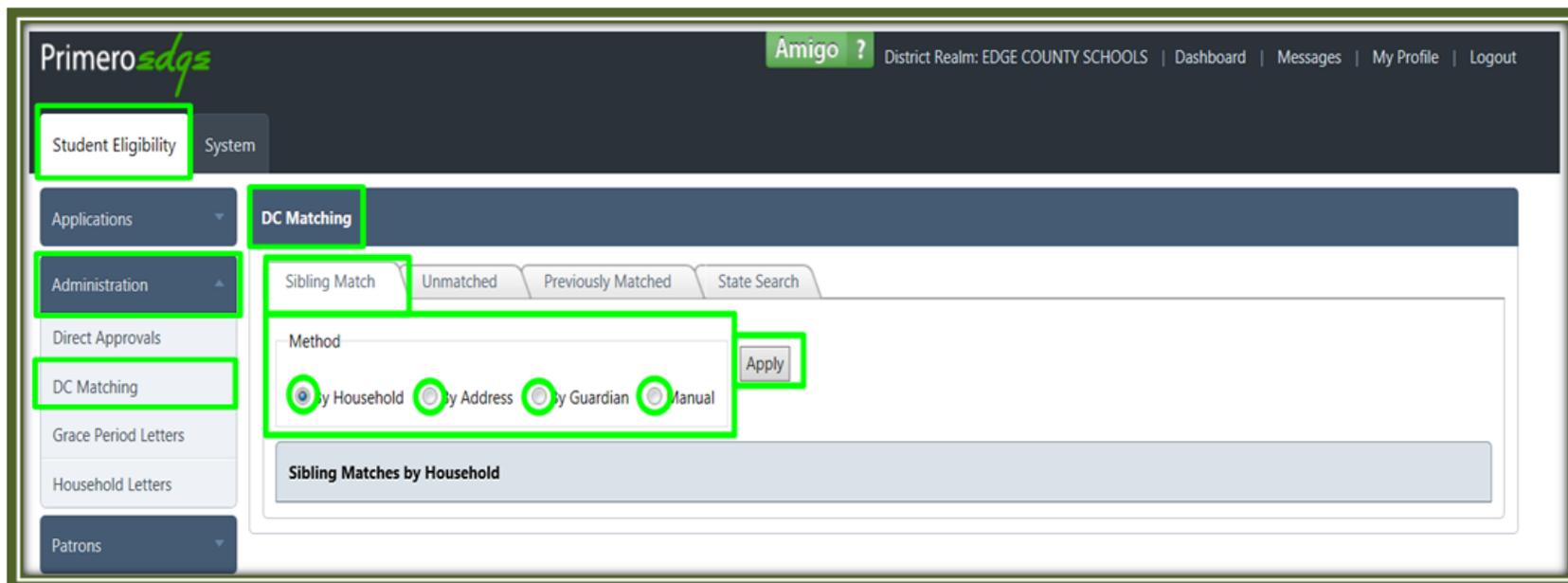
TIP: The DC matching area of the iMatch/PrimeroEdge system is one of the most important areas for school district /agencies to be able to use.

Student Eligibility Tab – Administration – DC Matching – Sibling Match Tab

1. Go to: Student Eligibility Tab – Administration – Dc Matching –Sibling Match Tab

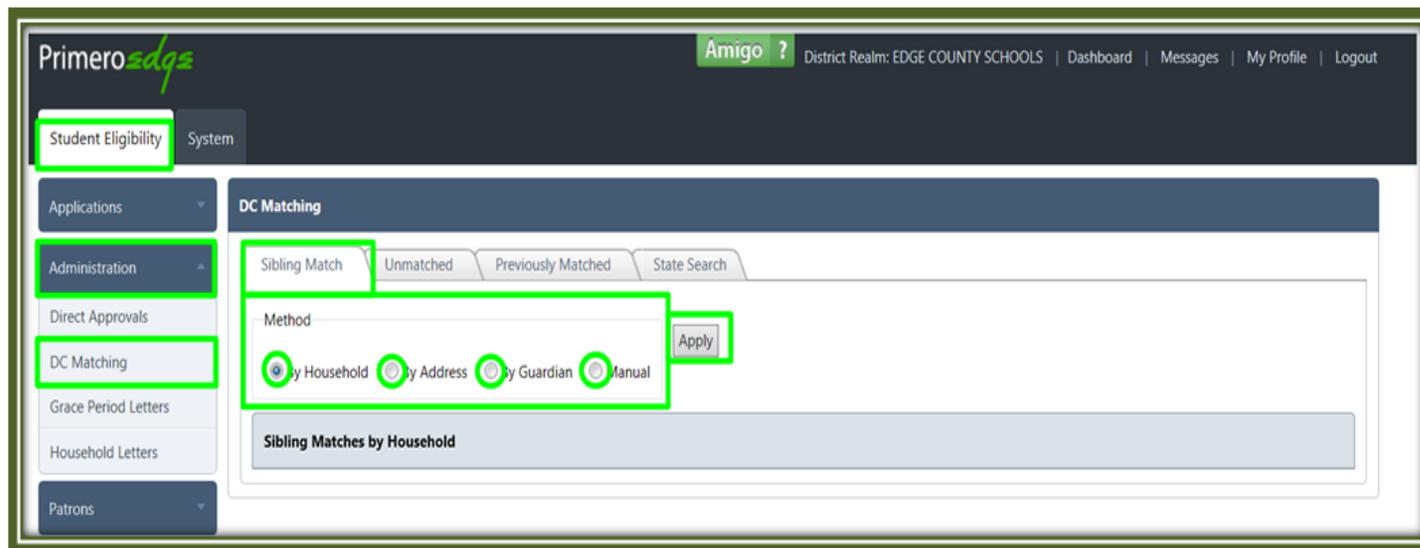
This section includes the following features:

- Sibling Match Tab – You can process matches for extended eligibility.
 - By Household
 - By Address
 - By Guardian
 - Manual
- Unmatched – Students that are on the Direct Certification list in your county code but not matched to your school.
- Previously Matched –the entire list of students that have been matched to your school
- State Search – Useful to find students (usually transfers) that are enrolled in your school, but their DC information is elsewhere in the State –and- they have not yet been matched.



Student Eligibility Tab – Administration - DC Matching – Sibling Match Tab – By Household Radial

1. Navigate to Student Eligibility Tab>Administration>DC Matching> Sibling Match Tab.
 - PrimeroEdge will suggest household sibling matches to you if you have students with the same Household PIN – meaning they have been sibling matched together in a prior year – they live at the same address - *and* where one student may be showing up as DC, while the other is not. Sending notification letters to siblings residing at the same address through PrimeroEdge will also create a household pin.
 - If there were suggested matches populated here, the process to match them is the same as matching by address - which is what we are covering next.



Tip: This section will give more match suggestions next year, since it works from the prior year's information and you will likely be sending notification letters out this year - which will create more household pins for it to check against next year.

Student Eligibility Tab – Administration - DC Matching - Sibling Match Tab - By Address Radial

1. Navigate to Student Eligibility Tab>Administration>DC Matching> Sibling Match Tab>By Address Radial.
 - Select the radial next to “By Address”
 - If you want PrimeroEdge to search for possible DC matches using the same household address, but specifying the students have the same last name choose the Last Name Match Required box and hit apply.
 - We will use the example of Buzz Lightyear and Slappy Stroodle; we know they live in the same household and have different last names - but Buzz Lightyear has free lunches while Slappy Stroodle has paid.

The screenshot shows the Primero Edge DC Matching interface. The left sidebar contains navigation options: Student Eligibility, System, Applications, Administration, Direct Approvals, DC Matching, Grace Period Letters, Household Letters, Patrons, Students, Application Reports, Eligibility Reports, Verification, Reviews, and Configuration. The main content area is titled 'DC Matching' and includes tabs for Sibling Match, Unmatched, Previously Matched, and State Search. Under the 'Method' section, the 'By Address' radio button is selected. The 'Last Name Match Required' checkbox is checked, and the 'Apply' button is visible. Below this, the 'Sibling Matches by Address' table is displayed with a 'Process Matches' button and a 'Refresh' button. The table has columns for Matching Approval, Address, Student ID, Last Name, First Name, Site, and Grade. Three rows are shown, with the first row highlighted in green: Buzz Lightyear (Student ID 6854938, Last Name Stroodle, First Name Slappy, Site Magic Kingdom Elementary, Grade 01).

Matching Approval	Address	Student ID	Last Name	First Name	Site	Grade
Buzz Lightyear	View	6854938	Stroodle	Slappy	Magic Kingdom Elementary	01
Mickey Mouse	View	212121	Jasmine	Princess	Disneyworld High School	10
Mickey Mouse	View	743589	Longhair	Rapunzel	Epcot Center Junior High	08

TIP: Just like Buzz Lightyear and Slappy Stroodle, because of blended families and for other reasons, you may not want to require the last name to be the same in your search. As with any manual match process always verify same household before processing the match.

Student Eligibility Tab – Administration - DC Matching - Sibling Match Tab - By Address Radial – Continued

- Click on the blue View link option to the right of Buzz Lightyear to see the match suggestion details. This pops up a box to let you know that both students live at 789456 Main Street.
- If you have verified that these students are indeed siblings, close the pop up information box - then check the box to the right of the view link shown above and press the button on the right - Process Matches. Or, if you have verified all of the matches on the page, you can put a check in the box next to address and process all 3 match suggestions at one time.

The screenshot shows the PrimeroSDGS web application interface. The main content area is titled 'DC Matching' and has tabs for 'Sibling Match', 'Unmatched', 'Previously Matched', and 'State Search'. Under the 'Sibling Match' tab, there is a 'Method' section with radio buttons for 'By Household', 'By Address' (selected), 'By Guardian', and 'Manual'. A checkbox for 'Last Name Match Required' is also present. Below this is a table titled 'Sibling Matches by Address' with columns for 'Matching Approval', 'Address', and 'Grade'. A pop-up window is open over the table, displaying a table with the following data:

Name	Street Address	City	State	Zip
Lightyear, Buzz (171717)	789456 Main Street	Rapid City	SD	11111
Stroodle, Slappy (6854938)	789456 Main Street	Rapid City	SD	11111

The pop-up window also has a 'Close' button at the bottom left. In the background, the 'Process Matches' button is visible on the right side of the table.

TIP: Because of apartment building addresses without unit numbers, and other oddities, it is possible to have an address match with children who are not siblings. Or, you could have two sets of student siblings with the last name of Smith living at the same apartment complex where no defining unit number was specified. Always verify that all the students are siblings before making a match.

Student Eligibility Tab – Administration- DC Matching - Sibling Match Tab- By Guardian Radial

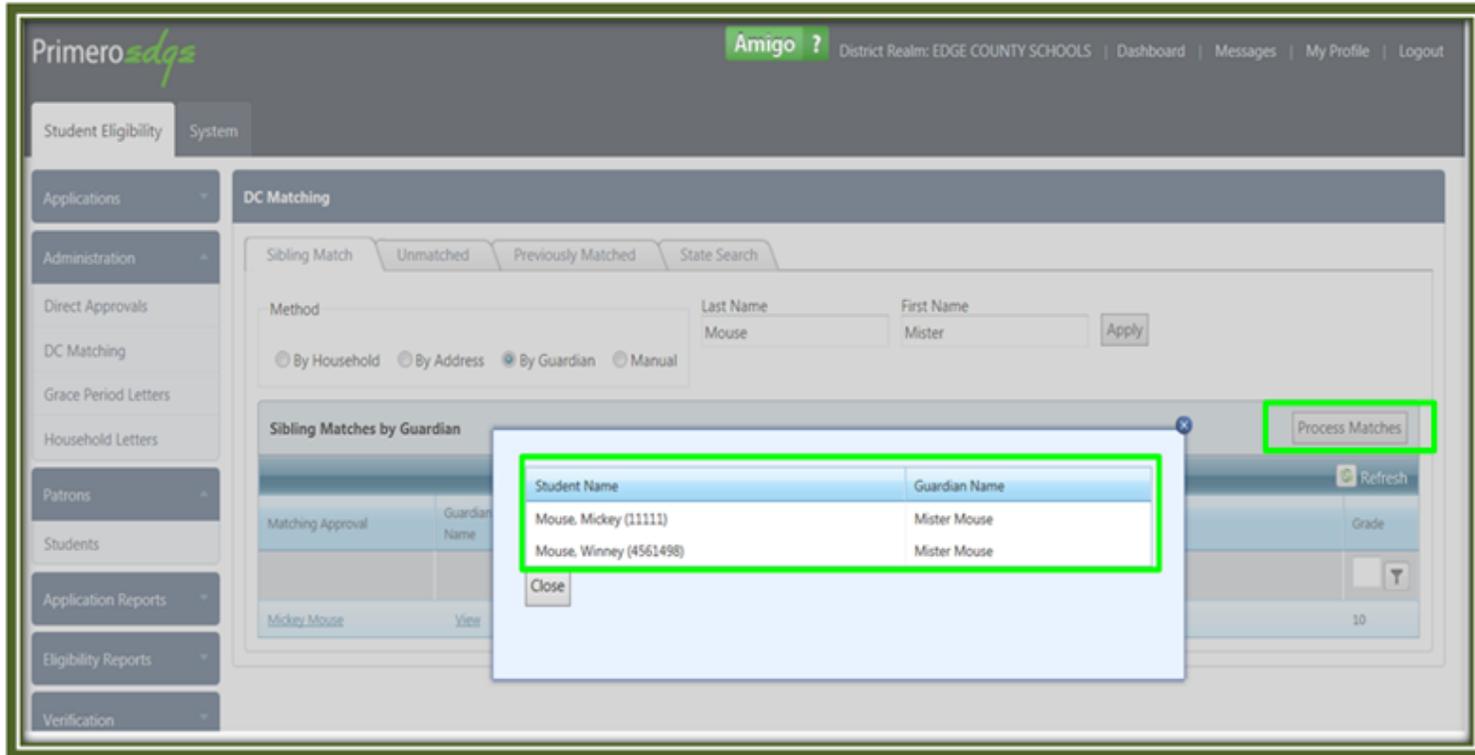
1. Navigate to: Student Eligibility Tab>Administration>DC Matching>Sibling Match Tab>Choose the By Guardian Radial
 - For Sibling Match by Guardian, we will use the example of Mickey Mouse. As long as Guardian Information is included in the student information file for the students, you can search for additional siblings to get matches using the Guardians 1st and last name.
 - In this case, Mickey Mouse’s guardian is Mister Mouse. So we will choose the radial for guardian and then enter the name of Mister Mouse and select apply as shown below.

The screenshot shows the Primero Edges web application interface. The top navigation bar includes the logo, a user profile 'Amigo ?', and links for 'District Realm: EDGE COUNTY SCHOOLS', 'Dashboard', 'Messages', 'My Profile', and 'Logout'. The left sidebar contains a menu with 'Student Eligibility' and 'System' tabs, and a list of navigation items: Applications, Administration, Direct Approvals, DC Matching, Grace Period Letters, Household Letters, Patrons, Students, Application Reports, and Eligibility Reports. The main content area is titled 'DC Matching' and has tabs for 'Sibling Match', 'Unmatched', 'Previously Matched', and 'State Search'. Under 'Sibling Match', there are radio buttons for 'By Household', 'By Address', 'By Guardian' (which is selected and circled in green), and 'Manual'. A search form is highlighted with a green box, containing 'Last Name' (Mouse) and 'First Name' (Mister) fields, an 'Apply' button, and a close 'x' icon. Below the search form is a section titled 'Sibling Matches by Guardian' with a 'Process Matches' button. A table displays the search results, with the first row highlighted in blue and circled in green. The table has columns for Matching Approval, Guardian Name, Student ID, Last Name, First Name, Site, and Grade. The data row shows 'Mickey Mouse' as the guardian name, Student ID 4561498, Last Name 'Mouse', First Name 'Winney', Site 'Disneyworld High School', and Grade 10. A 'View' link is present next to the guardian name.

Matching Approval	Guardian Name	Student ID	Last Name	First Name	Site	Grade
	Mickey Mouse	4561498	Mouse	Winney	Disneyworld High School	10

- 1) There are results! Mister Mouse is the Guardian of another child named Winney Mouse enrolled at this school. To see who it is so you can verify, click the blue link labeled View, this brings up an information box - as shown below.

Student Eligibility Tab – Administration - DC Matching - Sibling Match Tab - By Guardian Radial - Continued



- 2) Close the pop- up box that populated when you chose to view. To Process, place a mark in the box to the right of view, and click the box on the right labeled Process Matches as shown in the background (also on page 20).

Student Eligibility Tab- Administration - DC Matching - Sibling Match Tab - Manual Match Radial

1. Go to Student Eligibility Tab>Administration>DC Matching>Sibling Match>Choose the Manual match radial
2. Click on the 3 dot ellipsis box.
3. Enter the approved student ID – found in Infinite Campus (Mickey Mouse.) You can also search for Mickey Mouse’s student ID using the same ellipsis box -entering his name and searching for his ID by name.
4. Enter the sibling Student ID – found in Infinite Campus (Princess Jasmine) or you can also search for the student ID using the second ellipsis box entering the student name and searching for that student ID by name.
5. Both Approved student ID and Sibling Student ID are now populated. Click on the Process Matches box.
 - a. If you make a mistake, no problem! You can un-match from the previously matched screen, which we will be visiting next.
 - b. If you un-match a student manually, they are un-matched for the rest of the school year and will not be re-matched in any subsequent automatic system matching, even if they appear on a DC file. Do not re-match is checked by default. This is so there is no need to continually un-match the same students when there is an incorrect match.

Approved Student ID	Sibling Student ID	Last Name	First Name	Site	Grade
11111	212121	Jasmine	Princess	003	10

TIP: If you un-match a student in error, please contact PrimeroEdge support so we can get it corrected for you. This is important because un-matched students will not be subsequently re-matched – even if they appear on a subsequent DC file. Do not match in subsequent DC files is selected by default.

Student Eligibility Tab – Administration - DC Matching - Unmatched Tab

1. Go to Student Eligibility Tab>Administration>DC Matching>Choose the Unmatched Tab.
2. The unmatched tab is a useful tool to maximize potential matches. This tab works exactly the same as the unmatched tab in Direct Approvals – with the addition of the ability to export the unmatched students file.
3. There is nothing you need to do to make students appear in the Unmatched Tab. This file automatically contains unmatched students that:
 - a. Have a county code listed for them in the DC file that matches the county code for your District.
 - b. Then, these unmatched students will appear in the unmatched students tab for all Districts that have the same County Code specified in their District configuration, so the students can be found and matched.
 - c. Sometimes, students whose name spelling, birthdate, or other identifiable information was not exact enough for a direct match - in addition to having the same county code - will be found in the unmatched list.
 - d. Next to each student listed on the Unmatched Students Tab is an ellipse - a lookup box on the right with 3 dots inside. No lookup typing is required for this ellipse box – simply click on the ellipse box as shown below, and if the student is enrolled in your district it will automatically find them and pull up a box with their student information.

The screenshot shows the Primero Edges web application interface. The top navigation bar includes the logo, a user profile icon labeled 'Amigo', and links for 'District Realm: EDGE COUNTY SCHOOLS', 'Dashboard', 'Messages', 'My Profile', and 'Logout'. The left sidebar contains a menu with 'Student Eligibility' and 'System' highlighted. The main content area is titled 'DC Matching' and has tabs for 'Sibling Match', 'Unmatched', 'Previously Matched', and 'State Search'. The 'Unmatched' tab is active, displaying a table with columns: 'JD on file', 'Last Name on file', 'First Name on file', 'Grade on file', 'Birth Date', 'Case Number', 'Probability %', and 'Lookup'. An 'Export to Excel' button is located in the top right of the table area. The table contains one row with the following data: JD on file: 200023180, Last Name on file: BROWN, First Name on file: MCGUIRE, Birth Date: 07/21/1993. A dropdown menu is open for the 'Lookup' column, showing student details: Case Number, Guardian Name, Address, Birth Date: 07/21/1993, DC Type: DCMA, Phone 1, Phone 2, and Possible match: McGuire Brown (111112).

Student Eligibility – Administration - DC Matching - Unmatched Tab – Continued

4. If the student found in the unmatched list is “not” an enrolled student at your school district, you will get no results from clicking the ellipse box. The Box will be empty. When the student has been found as shown below - simply double click on the student found in the box to make the match.

The screenshot displays the 'DC Matching' interface in the 'Unmatched' tab. A table lists unmatched students with columns: ID on file, Last Name on file, First Name on file, Grade on file, Birth Date, Case Number, Probability %, and Lookup. A student with Case Number 200023180, Last Name BROWN, and First Name MCGUIRE is selected. A 'PrimeroEdge - Lookup' window is open, showing search criteria for Site Code, Site, and Grade, and search options for Student ID/SSN, PIN, and State ID. The search results table shows a match for Brown, McGuire at Disneyworld High School, Grade 12, Homeroom, and Birth Date 1/21/1999.

TIP: Enrolled in your school district means the student has enrolled in your School District and their student information has come over to PrimeroEdge in the student Information file. This can take 24-48 hours; it depends on when they enrolled relative to when the information file was processed last. Student Information files are generally processed on a daily basis.

Student Eligibility – Administration – DC Matching – Unmatched Tab – Using Probability

To use this new function select:

1. **Student Eligibility → Administration → DC Matching → Unmatched tab** (follow red outlines below). This list displays students that may be in your district, but the system was unable to complete a 100% match. We can see that a *Probability* column has now been added (green circle below).
 - a. 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.
 - b. Now we have a probability ranking that indicates the chance that the listed students match your enrolled students (green circle below).

The screenshot shows the 'Student Eligibility' system interface. On the left, a navigation menu has 'Administration', 'DC Matching', and 'Patrons' highlighted with red boxes. The main area is titled 'DC Matching' and has tabs for 'Sibling Match', 'Unmatched', 'Previously Matched', and 'State Search'. The 'Unmatched' tab is active. Below the tabs, there are radio buttons for 'All', 'Reviewed', and 'Not Reviewed', with 'Not Reviewed' selected. An 'Export to Excel' button is also present. A table with the following columns is displayed: ID on file, Last Name on file, First Name on file, Grade on file, Birth Date, Case Number, County Code, Probability, and Review Status. The 'Probability' column header is circled in green. A 'Refresh' button is located at the top right of the table area.

2. **To maximize your student matches, you should review all students listed with a High probability.** If you have the time to briefly scan through the Medium probability students, you may also find a few of your students listed.
3. To see if your high probability student is a match, start by clicking on the arrow next to the student name (green 1 and circle below) this will expand the student's information.

DC Matching

Sibling Match | Unmatched | Previously Matched | State Search

Unmatched ○ All ○ Reviewed ● Not Reviewed Export to Excel

Refresh

ID on file	Last Name on file	First Name on file	Grade on file	Birth Date	Case Number	County Code	Probability	Review Status
<input type="text"/>								
<input type="text"/>	High	Not Reviewed						

Case Number:
Guardian Name:
Address:
Birth Date:
DC Type: SNAP
Phone 1:
Phone 2:

Match	Name	Probability	Points
<input checked="" type="checkbox"/>	<input type="text"/>	High	42
<input type="checkbox"/>	<input type="text"/>	Medium	26

Find student:

4. After clicking the arrow (circled by green 1), look at the potential student matches off to the right.
5. You can click on the names in blue font to find additional information about the match data in the system.
 - a. A blue box will pop up that contains the data listed in the “Student Data” file – that comes from Infinite Campus and “File Data” is the DSS – SNAP/TANF file.
 - b. Check out the “Points” listed in the blue box (purple outlines below) to see where the system is finding the match. You will have to use some judgement and common sense to make sure you are making proper matches.
 - i. In the sample below this student matches first and last name, and the county code is the same. However, the date of birth is very different between the two files. You will have to use your best judgement to determine if this student is a match or not.

Matching Criteria	Student Data	File Data	Points
SSN			0
Student ID			0
Full Name			0
First and Last Name			20
Last and Middle Name			0
First and Middle Name			0
Last Name			0
First Name			0
DOB			0
Phonetic First Name			0
Phonetic Last Name			0
SOUNDEX First Name			0
SOUNDEX Last Name			0
Modified First Name			0
Modified Last Name			0
Name Twist Full Name			0
Name Twist First and Last Name			0
Variable DOB (± 10 day(s))			0
Street Address			0
Guardian			0
Phone 1			0
Phone 2			0
County Code(s)	Minnehaha	Minnehaha	12
Total - 32 (High)			

Close

PLEASE NOTE: Probability levels are determined based on the following points scored in the Matching Criteria:

- 0-19 Points = Low
- 20-31 Points = Medium
- 32-43 Points = High
- 44 Points and above = Auto Match

At this time, look at the high probability students listed in the Unmatched Tab, and review for a potential match. Medium probability students can be scanned by personnel.

6. Close the blue pop up box when you are done reviewing the student information.
7. If you find a student match, click the checkbox next to the student name (circle by blue 2 below).
8. Then select the Match button (red arrow by 3 below).
9. You can access the Student Lookup feature by clicking the three dots below the student pair list (purple arrow below).

The screenshot shows the 'DC Matching' interface. At the top, there are tabs for 'Sibling Match', 'Unmatched', 'Previously Matched', and 'State Search'. The 'Unmatched' tab is active. Below the tabs, there are radio buttons for 'All', 'Reviewed', and 'Not Reviewed' (selected), and an 'Export to Excel' button. A 'Refresh' button is also present. The main area displays a table with columns: ID on file, Last Name on file, First Name on file, Grade on file, Birth Date, Case Number, County Code, Probability, and Review Status. A green circle with the number '1' highlights a dropdown arrow in the 'ID on file' column. A blue circle with the number '2' highlights a checkbox in the 'Match' column of a row with 'High' probability. A red circle with the number '3' highlights a 'Match' button. A red arrow points to the 'Match' button. A purple arrow points to a 'Find student' button with a dropdown arrow. A detailed view of a student's information is shown on the left, including Case Number, Guardian Name, Address, Birth Date, DC Type: SNAP, Phone 1, and Phone 2. A 'Reviewed' button is also visible.

Some common issues that prevent direct matches:

- Spelling errors in the first or last name in the DSS SNAP/TANF list or Infinite Campus lists.
- The student's first, last, or middle names mixed up between the DSS SNAP/TANF list and Infinite Campus lists.
- The student's date of birth is mixed up on one list.
- Nicknames listed in one list, but not the other.

Student Eligibility – Administration - DC Matching - Previously Matched Tab

1. Navigate to Student Eligibility – Administration - DC Matching - Previously Matched Tab

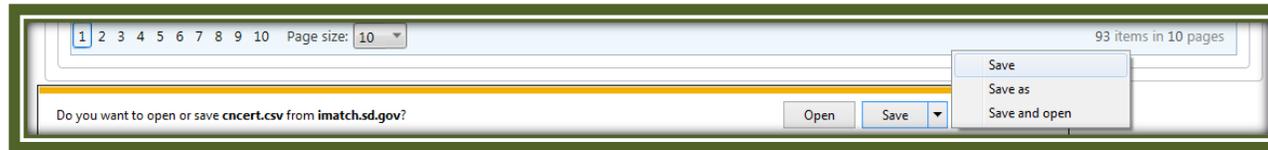
The DC Matching tab is where you will find all your previously matched students for your District and be able to export a file of all the matched students.

- To get a list of all previously matched students district wide, leave all the defaults until you get to the status box.
- To specify whether you want a list of currently active students, inactive students, or (all) students both active and inactive on that date - use the Status box to indicate your choices.
- From and to field – leave blank for information as of today's date, fill out from and to dates to capture a list of previously matched students for any time period during the current school year prior to and/or including today.
- Match Method – to capture all student eligibility types choose all 4 match types under match methods. If you only wanted to see transfer students, choose transfer as the Match Method. Any of the match methods listed can be chosen to receive only that match type.
- South Dakota's version of the PrimeroEdge system does not process any free and reduced applications or use any other DC types, so the exclude previously free students button does not function and can be ignored.
- Choose Apply. On the right is the export button. At the bottom of your screen you will get a prompt to open or save the file as shown below and on the next page.

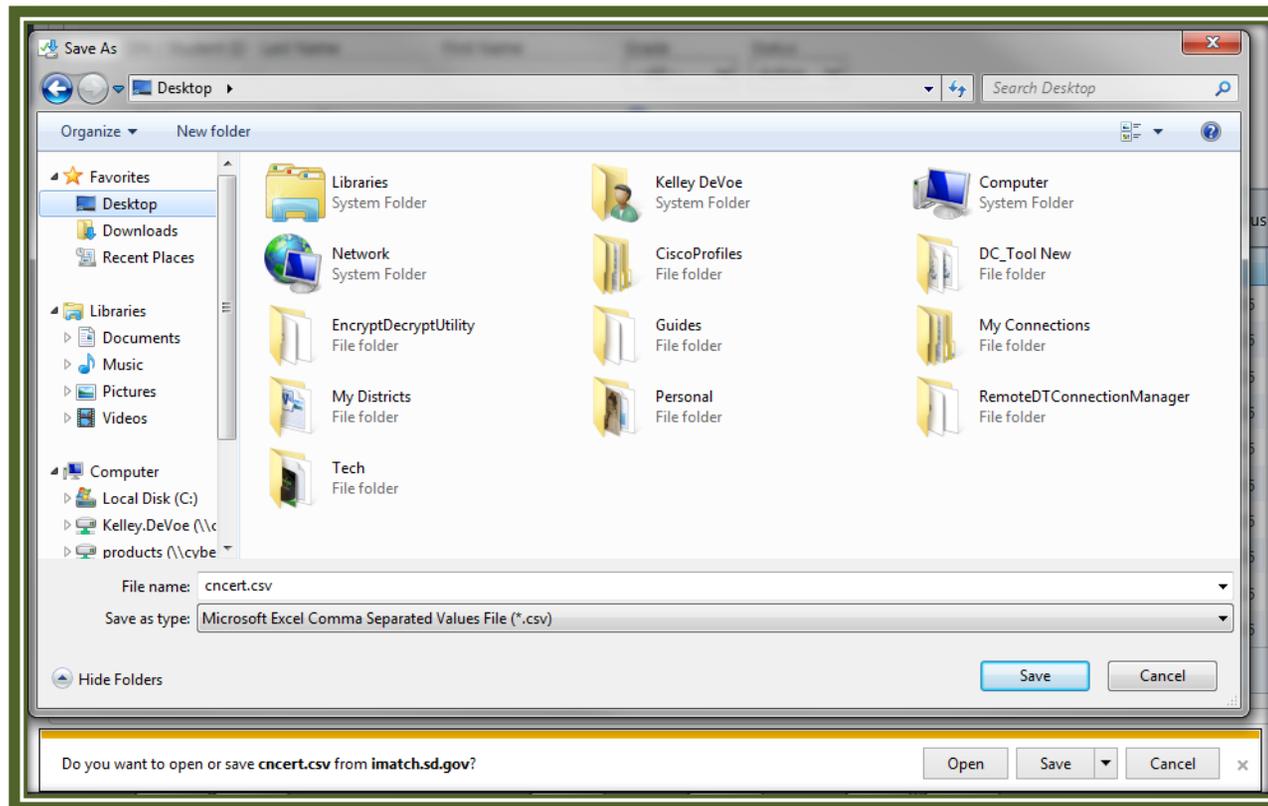
The screenshot displays the 'PrimeroEdge' interface for 'DC Matching'. The 'Previously Matched' tab is selected. The search criteria are set to Academic Year 2014-2015, Site Code -- All --, Site -- All --, and Status Active. The Match Method checkboxes for System, Sibling, Manual, and Transfers are all checked. The 'Matched Students' table contains the following data:

ID	Last Name	First Name	Site	Grade	Match Date	Effective Date	Match Method
> 101010	Hood	Robin	003	11	5/26/2015	5/26/2015	System
> 111111	AnDale	Chip	003	09	5/26/2015	5/26/2015	System
> 131313	Nosegrower	Pinocchio	003	09	5/26/2015	5/26/2015	System
> 666666	White	Snow	003	10	5/26/2015	5/26/2015	System

Student Eligibility – Administration - DC Matching - Previously Matched Tab continued



g. Save the file to your computer or network or other secure location.



Un-Matching from the Student Eligibility – Administration - DC Matching - Previously Matched Tab

1. Navigate to Student Eligibility – Administration – DC Matching – Previously Matched Tab

If you find a student that should not be matched because they are not part of your school district/agency, or for other reasons – they were matched in error, parent called and said their child is not DC, etcetera - you will want to un -match this student.

- From the previously matched screen in DC Matching
- Search for the student by student ID or name if necessary
- Click the arrow next to the student.
- The un-match button is at the bottom of the information for that student.
- If you Un-match a student in error, call PrimeroEdge support. An Un-matched student will not be subsequently re-matched. This is to prevent Districts from having to un-match a student again that was matched in error every time there is a new DC file Upload.

The screenshot displays the PrimeroEdge DC Matching interface. The sidebar on the left contains navigation options: Student Eligibility, Applications, Administration, Direct Approvals, DC Matching, Grace Period Letters, Household Letters, Patrons, Students, Application Reports, Eligibility Reports, Verification, Reviews, and Configuration. The main content area is titled 'DC Matching' and has tabs for Sibling Match, Unmatched, and Previously Matched. The 'Previously Matched' tab is active. The search area includes filters for Academic Year (2014 - 2015), Site Code (All), Site (All), SSN / Student ID, Last Name, First Name, Grade (All), and Status (Active). Below the search area is a table of 'Matched Students' with columns for ID, Last Name, First Name, Site, Grade, Match Date, Effective Date, and Match Method. A student with ID 101010 and name Hood Robin is highlighted. Below the student information is an 'Unmatch' button.

ID	Last Name	First Name	Site	Grade	Match Date	Effective Date	Match Method
101010	Hood	Robin	003	11	5/26/2015	5/26/2015	System

Student Eligibility – Administration - DC Matching - State Search Tab

1. Navigate to Student Eligibility>Administration>DC Matching>State Search Tab.

The screenshot shows the PrimeroEdge web application interface. The top navigation bar includes the logo, user name 'Amigo', and district information 'District Realm: EDGE COUNTY SCHOOLS - 02'. The left sidebar contains a menu with 'Student Eligibility' selected, and sub-menus for 'Administration' and 'DC Matching'. The main content area is titled 'DC Matching' and has tabs for 'Sibling Match', 'Unmatched', 'Previously Matched', and 'State Search'. The 'State Search' tab is active, showing a search form with fields for 'Last Name' (Duck), 'First Name' (Donald), and 'Birth Date' (3/3/2003). Below the form are radio buttons for search criteria: 'SSN and Birth Date', 'Name and Birth Date' (selected), and 'Case Number'. A 'Process Matches' button is located to the right of the search form. Below the search form is a table titled 'Students' with columns for Student ID, Last Name, First Name, Site, and Grade. A single row is displayed for Student ID 222222, Last Name Duck, First Name Donald, Site Sleepy Hollow HS, and Grade 12. A 'Refresh' button is located to the right of the table.

Student ID	Last Name	First Name	Site	Grade
222222	Duck	Donald	Sleepy Hollow HS	12

2. If a student is currently or newly enrolled in your district, but not currently showing on your previously matched list you can look the student up and match them using the State Search feature. This is useful when a student transfers to your district from another district in the State, but has not been immediately matched. In order to find the student in State Search, they must be currently enrolled in PrimeroEdge at your District - otherwise they will not appear in the search.

Student Eligibility – Administration - DC Matching - State Search Tab – Continued

- If you don't know for sure if the student is registered in PrimeroEdge, you can go to Student Eligibility>Patrons>Students and search for them by name or student ID to see whether they are registered. Sometimes it can take 24 to 48 hours for a new student to appear in PrimeroEdge. If the student does not come up in a search from this screen, then they are not yet registered in PrimeroEdge, and you will not be able to find them in the State search function.

The screenshot shows the 'Student Eligibility' administration interface. The top navigation bar includes the 'Amigo ?' logo and links for 'District Realm: EDGE COUNTY SCHOOLS - 02', 'Dashboard', 'Messages', 'My Profile', and 'Logout'. The left sidebar contains a menu with 'Student Eligibility' (highlighted), 'System', 'Applications', 'Administration', 'Direct Approvals', 'DC Matching', 'Grace Period Letters', 'Household Letters', 'Patrons', 'Students' (highlighted), 'Application Reports', and 'Eligibility Reports'.

The main content area is titled 'Students' and contains a search form. The form includes dropdown menus for 'Site Code' (value: 1) and 'Site' (value: Sleepy Hollow HS), and a 'Grade' dropdown (value: --ALL--). Below these are radio buttons for search criteria: 'Student ID/SSN' (selected), 'PIN', and 'State ID'. Text input fields for 'Last Name' (value: Duck) and 'First Name' (value: Donald) are present. There are also fields for 'Student ID/SSN', 'Birth Date', and a 'Status' dropdown (value: Active). 'Apply' and 'Reset' buttons are located below the search form.

Below the search form is a table titled 'Students' with an 'Add ...' button. The table has the following columns: Student ID/SSN, Last Name, First Name, Site, Grade, Birth Date, Eligibility, Status, and Balance. One row is displayed with the following data:

Student ID/SSN	Last Name	First Name	Site	Grade	Birth Date	Eligibility	Status	Balance
222222	duck	donald	Sleepy Hollow HS	12	03/03/2003		Active	\$0.00

Student Eligibility – Administration - DC Matching - State Search Tab – Continued

Now that we have confirmed the student is registered in PrimeroEdge, back to the State search function.

Navigate to Student Eligibility>Administration>DC Matching>State Search Tab.

1. You can search here by one of 3 methods:
 - a. SSN and Birthdate
 - b. Name and Birthdate
 - c. Case Number
2. In the example below, we found Donald Duck by searching his Name and Birthdate, which are the most common search criteria most Districts have to search with.
3. When the student is found in the lookup:
 - a. Place a checkmark next to their name on the bottom right.
 - b. Click the box on the right labeled Process matches.

The screenshot displays the PrimeroEdge DC Matching State Search interface. The search criteria are set to 'Name and Birth Date'. The search results table is as follows:

Student ID	Last Name	First Name	Site	Grade
222222	Duck	Donald	Sleepy Hollow HS	12

TIP: The student MUST BE CURRENTLY ENROLLED IN YOUR DISTRICT and have been DC in your State, or in the district they transferred from, to find them using the state search function.

Student Eligibility - Patrons – Students – Eligibility Tab

1. Navigate to Student Eligibility > Patrons > Students

By doing a student lookup and clicking on the eligibility tab, you can see the current eligibility status as well as the eligibility history for that student. Go to Student Eligibility Tab > Patrons > Students. Enter search criteria such as name. The student ID will be a blue clickable link.

Primero *sdgs* Amigo ? District Realm: EDGE COUNTY SCHOOLS | Dashboard | Messages | My Profile | Logout

Student Eligibility System

Applications Administration Direct Approvals DC Matching Grace Period Letters Household Letters Patrons Students Application Reports Eligibility Reports

Students

Site Code: --ALL-- Site: --ALL-- Grade: --ALL--

Student ID/SSN Last Name: Andale First Name: Chip

PIN

State ID

Student ID/SSN: Birth Date: Status: Active

Apply Reset

Students Add ...

Student ID/SSN	Last Name	First Name	Site	Grade	Birth Date	Eligibility	Status	Balance
111111	AnDale	Chip	Disneyworld High School	9	11/11/2001		Active	\$0.00

2. Click the link highlighted in yellow.

Student Eligibility - Patrons – Students – Eligibility Tab - Continued

3. This will automatically take you to the student details page for the student. Click on the Eligibility tab Highlighted below.

The screenshot displays the Primo Edges web application interface. At the top, the logo 'Primo *edges*' is on the left, and 'Amigo ?' with navigation links for 'District Realm: EDGE COUNTY SCHOOLS', 'Dashboard', 'Messages', 'My Profile', and 'Logout' is on the right. Below the header, there are two tabs: 'Student Eligibility' (selected) and 'System'. A left-hand navigation menu includes 'Applications', 'Administration', 'Patrons', 'Students', 'Application Reports', 'Eligibility Reports', 'Verification', 'Reviews', and 'Configuration'. The main content area is titled 'Student Details: Chip AnDale - 111111' and includes a link to 'Back to Students'. The 'Eligibility' tab is highlighted with a green box. The page is divided into several sections: 'Particulars' (First Name: Chip, Last Name: AnDale, Middle Name, SSN: 111-11-1111, Home Phone, Address: 23456 Main Street, Apt, City: Rapid City, State: SD, Zip: 11111), 'Demographics', 'Household', 'Picture/Notes', 'Image/Documents', 'Allergies/Restrictions', and 'Enrollment History'. The 'Eligibility' section includes a table with the following data:

Eligibility	Reason	Expiration Date
Free	DIRECTCERT	7/31/2015

Below the table, it shows 'Current Balance is \$0.00' and a checked box for 'Account is active'. An 'Edit' button is located to the right of the table. At the bottom right, there are 'Cancel' and 'Save' buttons.

Student Eligibility - Patrons – Students – Eligibility Tab - Continued

4. The eligibility tab is useful because it gives the current school year eligibility and activity/history for the student. Our student Chip Andale was imported to PrimeroEdge in a student information file as a new student on 05/20/2015. He had the eligibility of Paid Default. He then was found on the Direct Certification Import dated 05/26/2015, and automatically matched by the PrimeroEdge program giving him free status as of the date of 05/26/2015.
5. Should you need to view it, there is a clickable link for the actual direct certification file information that he was processed on.

The screenshot shows the PrimeroEdge interface for a student's eligibility. The student's name is Chip AnDale (ID: 111111). The 'Eligibility' tab is selected and highlighted with a green box. Below the tab, a table lists eligibility records. The table has columns for Status, Start Date, End Date, Process Date, Reason, App/File #, Processed By, and Comments. Two records are shown: one for 'Free' status starting 5/26/2015 and one for 'Paid' status starting 5/20/2015. The 'Free' record's process date is 5/26/2015, and the 'Paid' record's process date is 5/20/2015. The 'Free' record's comment is 'AUTOMATIC MATCH - STUDENT ID'. Below the table, there is a note: '* Note: Italics indicates historical eligibility records that have been overwritten or not applied.' At the bottom right, there are 'Cancel' and 'Save' buttons.

Status	Start Date	End Date	Process Date	Reason	App/File #	Processed By	Comments
Free	5/26/2015	7/31/2015	5/26/2015	DIRECTCERT	1041	Cybersoft Support	AUTOMATIC MATCH - STUDENT ID
Paid	5/20/2015	5/25/2015	5/20/2015	DEFAULT	0	IMPORT	

Student Eligibility - Patrons – Students – Household Tab

Moving left, to the household tab, shows what other students have been identified as siblings/ in same household. Scrooge McDuck has another student identified as a sibling because of a manual sibling match.

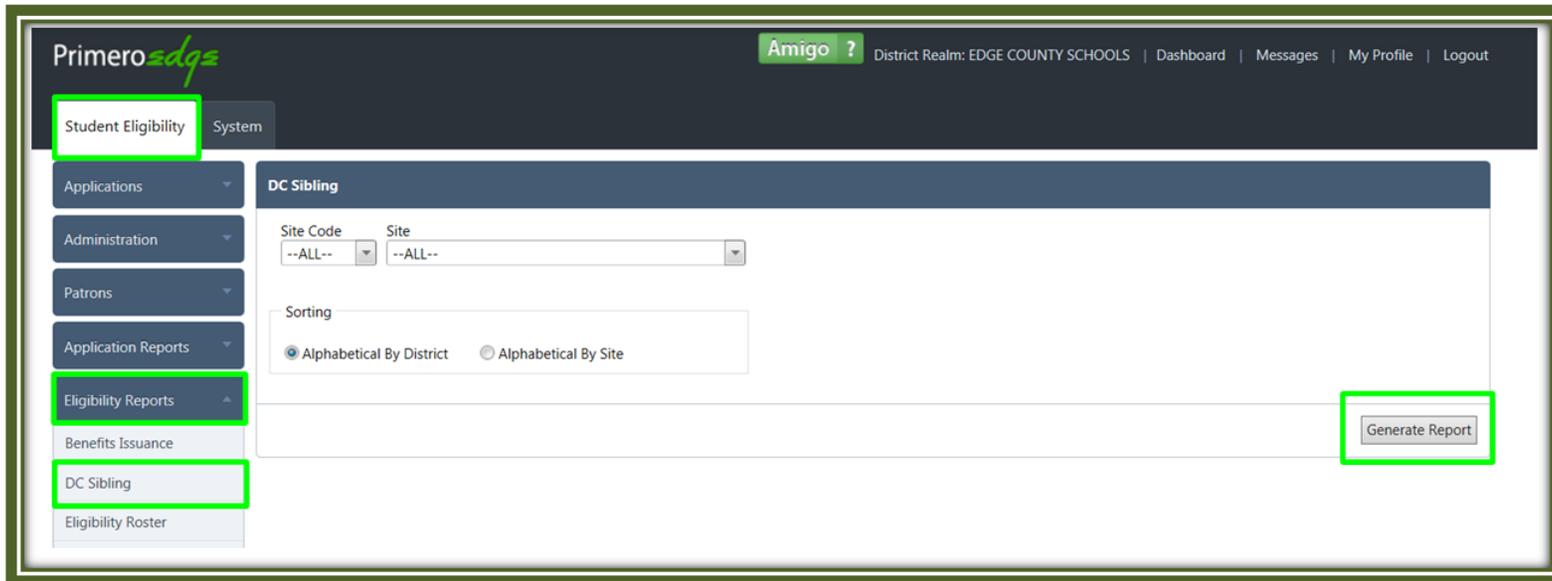
The screenshot displays the 'Student Eligibility' interface for Scrooge McDuck (ID: 7890987). The 'Household' tab is selected, showing a table of 'Students in Household'. The table lists two students: Isarealdog (Pluto, ID 55555, Magic Kingdom Elementary, Grade 05, Household Pin 1004) and McDuck (Scrooge, ID 7890987, Epcot Center Junior High, Grade 06, Household Pin 1004). A 'Details ...' button is visible next to the first student's row. The interface includes a navigation menu on the left with options like Applications, Administration, Patrons, Students, Application Reports, Eligibility Reports, Verification, Reviews, and Configuration. The top navigation bar shows 'Amigo ?' and links for District Realm, Year Begin, Dashboard, Messages, My Profile, and Logout.

Last Name	First Name	ID	School	Grade	Household Pin	
Isarealdog	Pluto	55555	Magic Kingdom Elementary	05	1004	Details ...
McDuck	Scrooge	7890987	Epcot Center Junior High	06	1004	

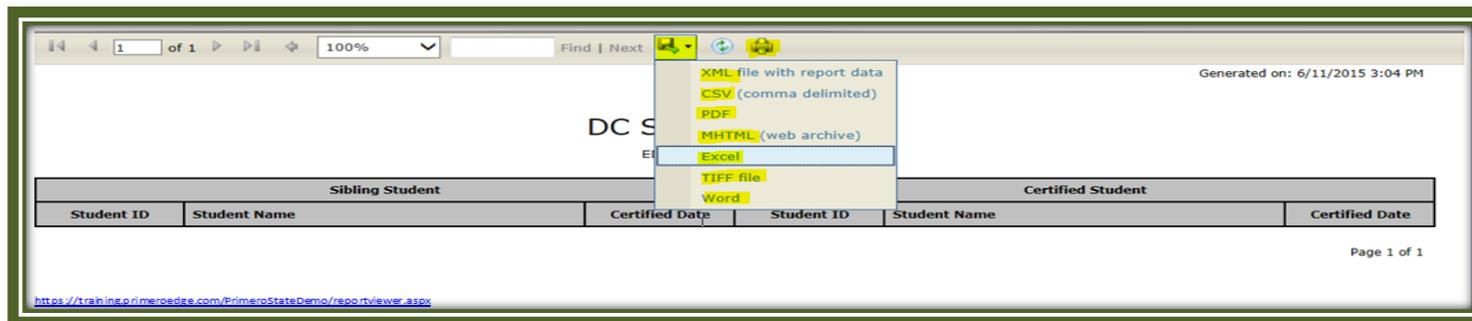
Student Eligibility - Eligibility Reports – DC Sibling

1. Navigate to Student Eligibility> Eligibility Reports> DC Sibling.

You can run a report in PrimeroEdge for any identified DC siblings. You can specify a site, or leave the default which is blank to get the whole district.



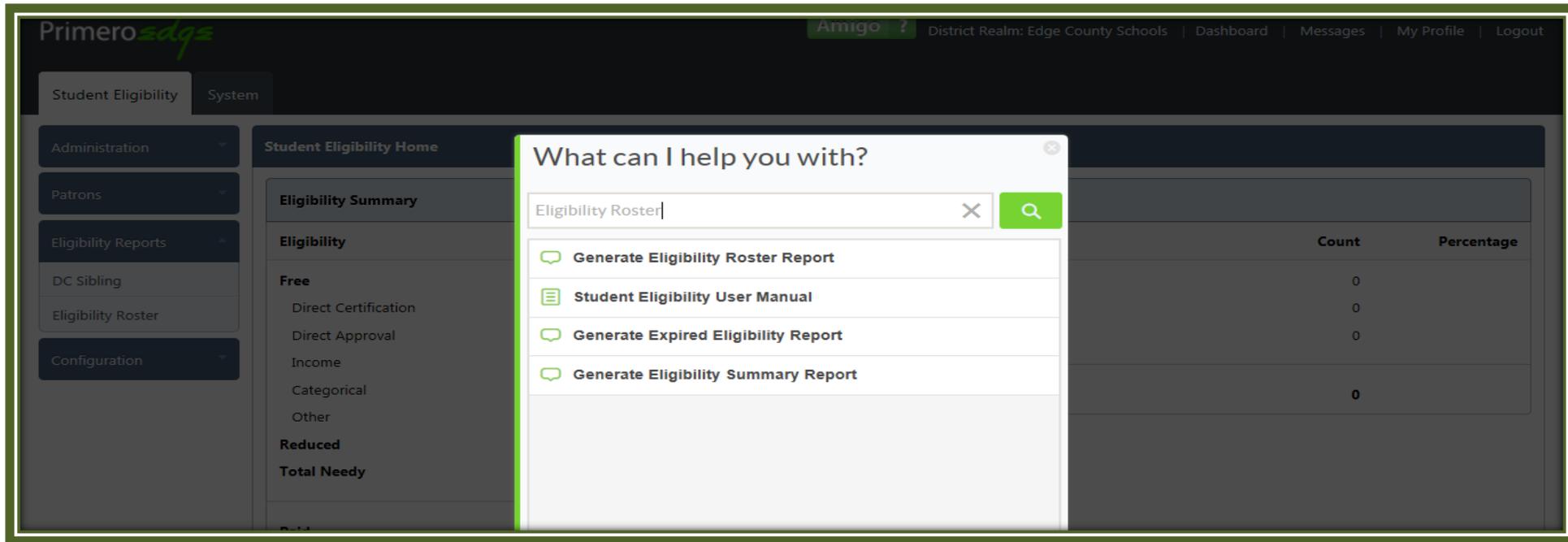
When the report populates, you can either print it directly using the print icon, or you can save the file by clicking on the file icon in a variety of file formats.



Using Amigo & How to Generate Eligibility Roster Report

Let's use Amigo to create a Student Eligibility Roster, and learn to run a Student Eligibility Roster at the same time.

1. Click on the green Amigo Icon
2. In the search box type in Eligibility Roster.
 - This gives the option to have Amigo guide you through generating an Eligibility Roster Report.
 - Once you are familiar with the process, you can also click on Eligibility Roster on your own without using Amigo to guide you.
 - Without using amigo you would navigate to Student Eligibility> Eligibility Reports> Eligibility Roster.



The screenshot shows the Primero SDGS Amigo interface. The top navigation bar includes the logo, 'Amigo' icon, and links for 'District Realm: Edge County Schools', 'Dashboard', 'Messages', 'My Profile', and 'Logout'. The main content area is divided into 'Student Eligibility' and 'System' tabs. A search box is active with the text 'Eligibility Roster'. Below the search box, a list of results is displayed:

Count	Percentage
0	
0	
0	
0	

The search results list includes:

- Generate Eligibility Roster Report
- Student Eligibility User Manual
- Generate Expired Eligibility Report
- Generate Eligibility Summary Report

3. Amigo will pop up a box, choose Generate Eligibility Roster Report.

Using Amigo & How to Generate Eligibility Roster Report - Continued

4. Amigo begins to walk you through how to generate an Eligibility Roster Report step by step.
 - The pop up boxes will show you exactly where to click to create this roster
 - Student Eligibility
 - Eligibility Reports
 - Eligibility Roster

The screenshot shows the Amigo interface for Student Eligibility. The top navigation bar includes the Amigo logo and links for District Realm: Edge County Schools, Dashboard, Messages, My Profile, and Logout. The left sidebar contains a menu with 'Administration', 'Patrons', 'Eligibility Reports', 'DC Sibling', and 'Eligibility Roster'. The 'Eligibility Roster' link is highlighted with a green box, and a pop-up box is overlaid on it with the text 'Click Eligibility Roster' and 'Step 3/5'. The main content area is titled 'Student Eligibility Home' and contains two tables: 'Eligibility Summary' and 'Applications'.

Eligibility Summary		
Eligibility	Count	Percentage
Free	1	50.00%
Direct Certification	1	50.00%
Direct Approval	0	0.00%
Income	0	0.00%
Categorical	0	0.00%
Other	0	0.00%
Reduced	0	0.00%
Total Needy	1	50.00%
Paid	1	50.00%
Not Applied	1	50.00%
Denied	0	0.00%
Total Enrolled	2	

Applications		
Entry Method	Count	Percentage
Scanned	0	
Online	0	
Manual	0	
Total	0	

Using Amigo & How to Generate Eligibility Roster Report - Continued

- Once you have clicked on Eligibility Roster (Student Eligibility – Eligibility Reports – Eligibility Roster) Amigo asks you to select the report Criteria.
 - In South Dakota the simplest way to run this report is to uncheck the box that says Default.

The screenshot displays the Amigo Student Eligibility Roster report generation interface. The interface is divided into a sidebar on the left and a main content area. The sidebar contains a navigation menu with the following items: Student Eligibility (highlighted), System, Applications, Administration, Patrons, Application Reports, Eligibility Reports (highlighted), Benefits Issuance, DC Sibling, Eligibility Roster (highlighted), Eligibility Summary, Expired Eligibility, Other Benefits, Percent Economically Disadvantaged, Student Activity, Student Status Change, Verification, and Reviews. The main content area is titled 'Eligibility Roster' and contains the following sections:

- Filters:** Site Code (dropdown: --ALL--), Site (dropdown: --ALL--), Grade (dropdown: --ALL--), and As of Date (calendar: 6/11/2015).
- Eligibility:** A list of checkboxes for 'Free', 'Reduced', and 'Paid', all of which are checked.
- Reason:** A list of checkboxes for various reasons, including 'Uncheck All', 'Categorical', 'CEP Transfer', 'DC Foster', 'DC Medicaid', 'DC SNAP', 'DC Unmatched', 'Denied', 'Direct Cert', 'Even Start', 'Foster', 'Grace Period', 'Head Start', 'Homeless', 'Import', 'Income', 'Migrant', 'Pre-Approval', 'Principal Approved', 'RCCI', 'Refused Benefits', 'Removed', 'Runaway', 'Transfer', and 'Verification'. The 'Default' checkbox is highlighted in yellow.
- Display:** A list of checkboxes for display options, including 'Show Eligibility Code Only', 'Show Application Information', 'Contact Info', 'Sort by Grade', and 'Only Verification Sites', all of which are unchecked.
- Include:** A list of checkboxes for inclusion options, including 'Inactive Students' (checked and highlighted in yellow) and 'Inactive Sites' (unchecked).

At the bottom right of the main content area, there is a 'Generate Report' button. A 'Select Report Criteria' dialog box is overlaid on the bottom center of the screen, showing 'Step 4/5' and a 'Next' button.

Using Amigo & How to Generate Eligibility Roster Report – Continued

6. Select Generate report

- When Amigo is running it will prompt you at each step of the process.
- There may be times that you will want a roster of students that includes those students that are no longer actively enrolled at your school, because they were free at a prior date during the school year. If that is the case, then you would choose the option to include inactive students. If you only want currently active students, do not check this option.
- You can choose today's date, or if you wanted to know who was free as of any prior date during the school year, you could choose that date instead.

Generated on: 6/11/2015 3:15 PM

Eligibility Roster

EDGE COUNTY SCHOOLS
As of 6/11/2015

ID	Name	Grade	Eligibility	Reason	Start Date	End Date
SFA: EDGE COUNTY SCHOOLS						
Site: 001 Magic Kingdom Elementary						
77777	Beauty, Sleeping	3	Free	DIRECTCERT	5/26/2015	7/31/2015
121212	Bell, Tinker	PK	Free	DIRECTCERT	5/26/2015	7/31/2015
55555	Isarealdog, Pluto	5	Free	DIRECTCERT	5/26/2015	7/31/2015
171717	Lightyear, Buzz	3	Free	DIRECTCERT	5/27/2015	7/31/2015
11111	Mouse, Mickey	KG	Free	DCSNAP	5/26/2015	7/31/2015
181818	Peep, Bo	6	Free	DIRECTCERT	5/27/2015	7/31/2015
Site Total: 6						

Page: 1 of 4

<https://training.primeroedge.com/PrimeroStateDemo/reportviewer.aspx>

Using Amigo & How to Generate Eligibility Roster Report – Continued

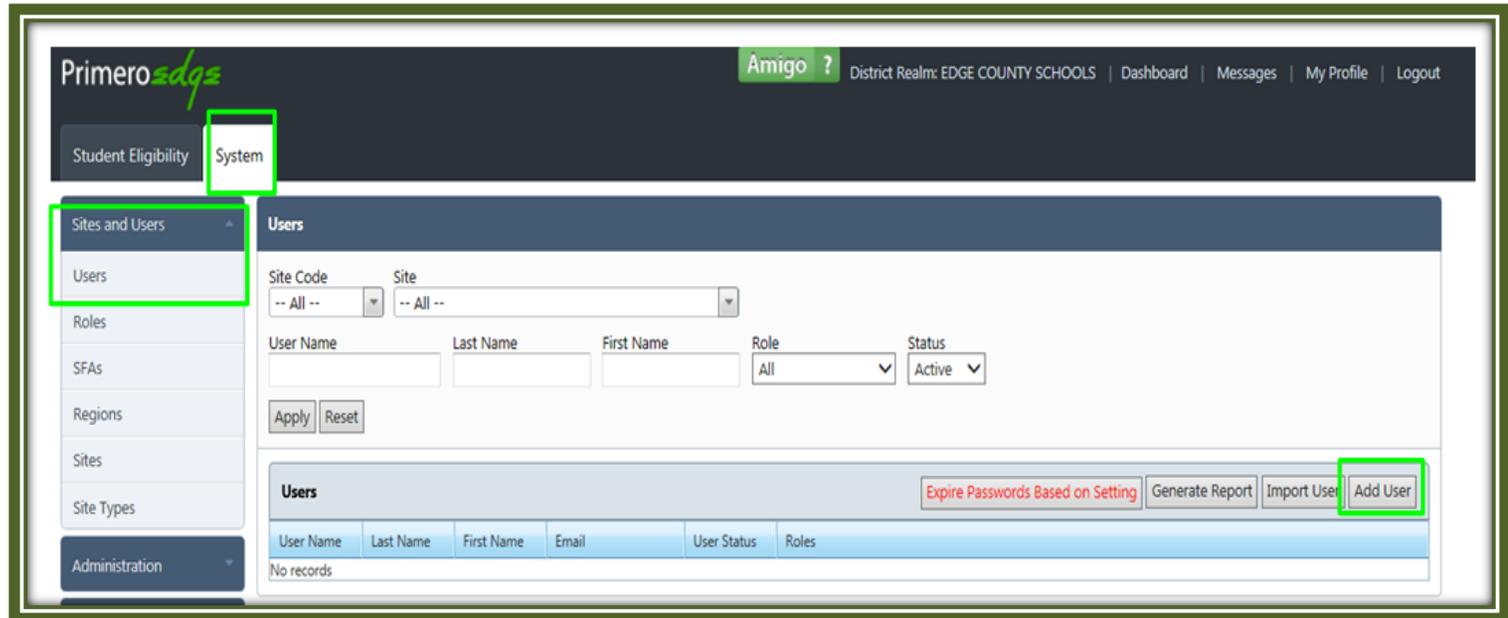
7. As with any report generated in PrimeroEdge, clicking on the blue file icon at the top of the screen will allow you to save the file in a variety of file formats and print from there. Or, you can click on the printer icon and print without saving.

ID	Name	Grade	Eligibility	Start Date	End Date
SFA: EDGE COUNTY SCHOOLS					
Site: 001 Magic Kingdom Elementary					
77777	Beauty, Sleeping	3	Free	DIRECTCERT	5/26/2015 7/31/2015
121212	Bell, Tinker	PK	Free	DIRECTCERT	5/26/2015 7/31/2015
55555	Isarealdog, Pluto	5	Free	DIRECTCERT	5/26/2015 7/31/2015
171717	Lightyear, Buzz	3	Free	DIRECTCERT	5/27/2015 7/31/2015
11111	Mouse, Mickey	KG	Free	DCSNAP	5/26/2015 7/31/2015
181818	Peep, Bo	6	Free	DIRECTCERT	5/27/2015 7/31/2015
Site Total: 6					

System tab – Sites and Users - Users – Add User

1. Navigate to System Tab>Sites and Users > Add user

- To add a user, click on the Add User button on the lower right.



The screenshot shows the Primo Edges user interface. At the top, there is a navigation bar with the logo 'Primo edges' and a user profile 'Amigo ?' with the text 'District Realm: EDGE COUNTY SCHOOLS'. Below this are links for 'Dashboard', 'Messages', 'My Profile', and 'Logout'. A secondary navigation bar contains 'Student Eligibility' and 'System' (highlighted with a green box). A sidebar on the left lists 'Sites and Users' (highlighted with a green box), 'Users' (highlighted with a green box), 'Roles', 'SFAs', 'Regions', 'Sites', 'Site Types', and 'Administration'. The main content area is titled 'Users' and contains a form with fields for 'Site Code', 'Site', 'User Name', 'Last Name', 'First Name', 'Role' (set to 'All'), and 'Status' (set to 'Active'). There are 'Apply' and 'Reset' buttons. Below the form is a table with columns 'User Name', 'Last Name', 'First Name', 'Email', 'User Status', and 'Roles', showing 'No records'. At the bottom right of the table area, there are buttons for 'Expire Passwords Based on Setting', 'Generate Report', 'Import User', and 'Add User' (highlighted with a green box).

- Fill out the User Profile Information as shown below. This includes the desired username, 1st Name, Last Name, Email, Work Phone, Organization level - In the case of South Dakota you would choose District for the Organization Level as shown below.



The screenshot shows a form with three labels: 'Organization Level *:', 'Language:', and 'Theme:'. To the right of the 'Organization Level *:' label is a dropdown menu with the following options: '-- SELECT --', 'Site', 'Area', and 'District' (highlighted in yellow).

System tab – Sites and Users - Users – Add User – Continued

2. Then fill out the Password information. Choose whether the password never expires, or whether the password must be changed to a password of the user's choice upon the 1st login.
3. The region will pre-populate for you when you have chosen the Organization level of District. You will not have to change it unless the user is *not* a District user and will *not* have permission to view all students in the district. This should not be the case in South Dakota, because you only have District Users, and no Site users.

The screenshot shows the 'Add User' form in the PrimeroEdge system. The form is titled 'Users' and is divided into several sections:

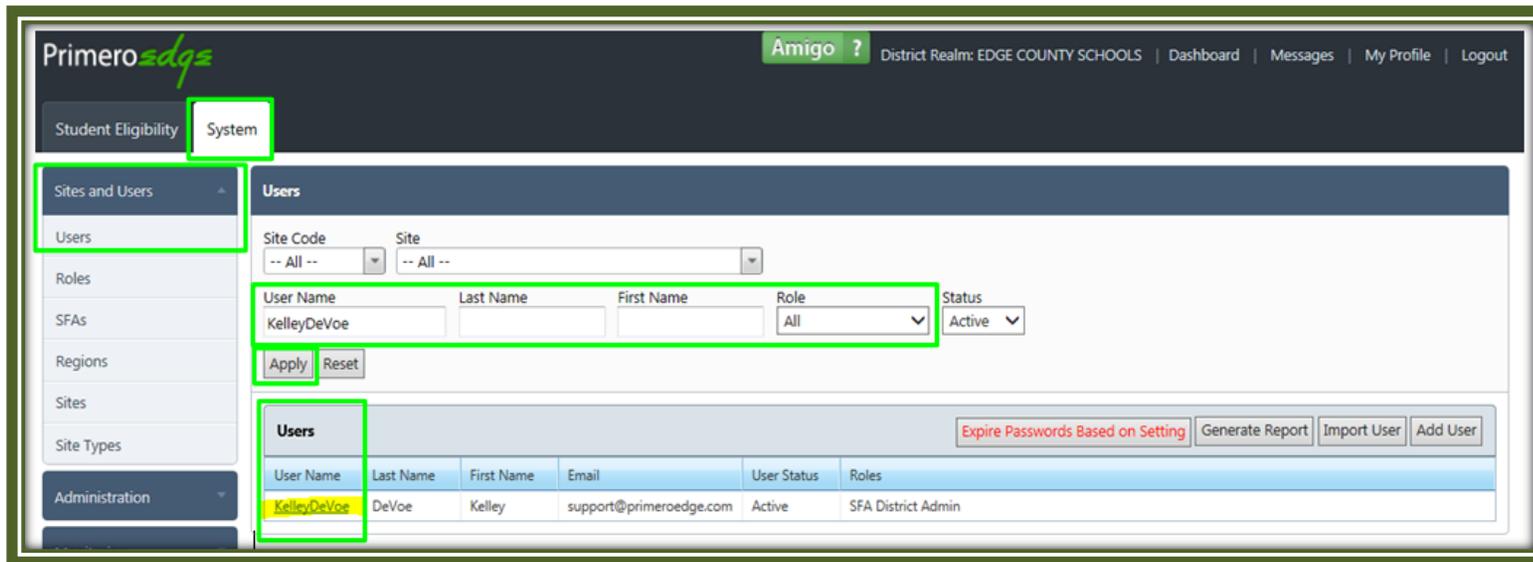
- User Profile:** Fields for User Name (KelleyDevoe), First Name (Kelley), Last Name (DeVoe), Middle Initial, Email (Kelley.devoe@primeroedge), Work Phone ((555) 555-5555), Cell Phone, User Status, Organization Level (District), Language (English), and Theme (Select a theme).
- Password:** Fields for New Password and Confirm Password, with checkboxes for 'User must change password at next login' and 'Password never expires'.
- User Organization Positions:** A dropdown for Region (EDGE COUNTY SCHOOLS).
- Roles:** Checkboxes for Administrator, SFA District Admin, and SFA District User.

A 'Create User' button is located at the bottom right of the form.

3. Roles - In South Dakota Users will always be an SFA District Admin, and the other choices will not appear.
4. Click Create User. The User will then be ready for their 1st login to PrimeroEdge.

1. System tab – Sites and Users - Users –Deactivate User

- 2. Navigate to System Tab> Sites and Users>Users>
- 3. Search for the user by any of the below criteria:
 - Username
 - Last Name
 - First Name
 - Role



- 4. When the user has populated, their user name is a blue link as shown above. Click on the link.

System tab – Sites and Users - Users –Deactivate User – Continued

5. Clicking on the link for the username brings you to the user detail page. To De-Activate the user, click on the De-activate User button in the lower right hand corner. This does not erase the account from the system – but it inactivates the account so that it cannot be used until such time as it is re-activated.
6. Once the account has been De-Activated – following the same instructions to get to this same page will give you the Re-Activate user button, instead of the De-activate user button once the account has been De-Activated.

The screenshot displays the PrimoEdgs user management interface. The top navigation bar includes the logo, 'Amigo ?' status, and links for 'District Realm: EDGE COUNTY SCHOOLS', 'Dashboard', 'Messages', 'My Profile', and 'Logout'. The left sidebar contains a menu with 'System' selected, and 'Sites and Users' expanded to show 'Users'. The main content area is titled 'Users' and features a '- Back to Users' link. The 'User Profile' section contains fields for User Name (KelleyDeVoe), First Name (Kelley), Last Name (DeVoe), Middle Initial, Email (support@primeroedge.com), Work Phone ((866) 442-6030), Cell Phone, and User Status (Active). The 'Password' section includes fields for New Password and Confirm Password, with checkboxes for 'User must change password at next login' and 'Password never expires'. The 'User Organization Positions' section shows the Region set to 'EDGE COUNTY SCHOOLS' and a 'Roles' section with checkboxes for 'Administrator', 'SFA District Admin' (checked), and 'SFA District User'. At the bottom right, the 'De-Activate User' button is highlighted with a green box, along with an 'Update User' button.

System tab – Sites and Users - Users –Change Password

1. Navigate to the System Tab> Sites and Users> Users.
2. Search for the User by any of the below Criteria:
 - Username
 - Last Name
 - First Name
 - Role

The screenshot displays the 'Primero Edges' interface. The top navigation bar includes 'Amigo ?' and 'District Realm: EDGE COUNTY SCHOOLS'. The left sidebar shows 'System' selected under 'Student Eligibility'. The main content area is titled 'Users' and contains search filters for Site Code, Site, User Name, Last Name, First Name, Role, and Status. Below the filters are 'Apply' and 'Reset' buttons. A table lists users, with the first entry 'KelleyDeVoe' highlighted. The table columns are User Name, Last Name, First Name, Email, User Status, and Roles.

User Name	Last Name	First Name	Email	User Status	Roles
KelleyDeVoe	DeVoe	Kelley	support@primeroedge.com	Active	SFA District Admin

3. When the user has populated, their user name is a blue link as shown above. Click on the link.

System tab – Sites and Users - Users –Change Password – Continued

The screenshot displays the Primo Edge user management interface. The top navigation bar includes the logo, user name 'Amigo', and links for 'District Realm: EDGE COUNTY SCHOOLS', 'Dashboard', 'Messages', 'My Profile', and 'Logout'. The left sidebar contains a menu with 'System' selected, and sub-items for 'Sites and Users', 'Users', 'Roles', 'SFAs', 'Regions', 'Sites', 'Site Types', 'Administration', 'Monitoring', 'Management', 'Configuration', 'System Tools', and 'SIF'. The main content area is titled 'Users' and features a 'Back to Users' link. The 'User Profile' section shows details for user 'KelleyDeVoe', including first and last names, email, work phone, and organization level. The 'Password' section contains input fields for 'New Password' and 'Confirm Password', along with checkboxes for 'User must change password at next login' and 'Password never expires'. The 'User Organization Positions' section shows the region as 'EDGE COUNTY SCHOOLS'. The 'Roles' section has checkboxes for 'Administrator', 'SFA District Admin', and 'SFA District User'. At the bottom right, there are buttons for 'De-Activate User' and 'Update User'.

4. Change the Password. Confirm the Password. Click Update user in the lower right hand corner. Finished!

System Tab – Sites and Users – SFA’s – General Information Tab

Direct Certification Notification Letters pull information from both the General Info tab and the Officials tab. The General Information tab is shown below. Please verify the information shown in the 1st section boxed in green - and if it is incorrect, correct the information. Save the changes when you are finished. The save button is in the lower right hand corner.

The screenshot displays the 'SFA Details: EDGE COUNTY SCHOOLS' form in the 'General Info' tab. A green box highlights the following fields:

- Region: --NONE--
- Agency Code: []
- County Code: []
- SFA Name: EDGE COUNTY SCHOOLS
- Physical Address:
 - Street / PO Box: xx
 - City: xx
 - State: TX
 - Zip: 00000- []
 - Phone: () - -
 - Fax: () - -
- Correspondence Address:
 - Street / PO Box: []
 - City: []
 - State: TX
 - Zip: []

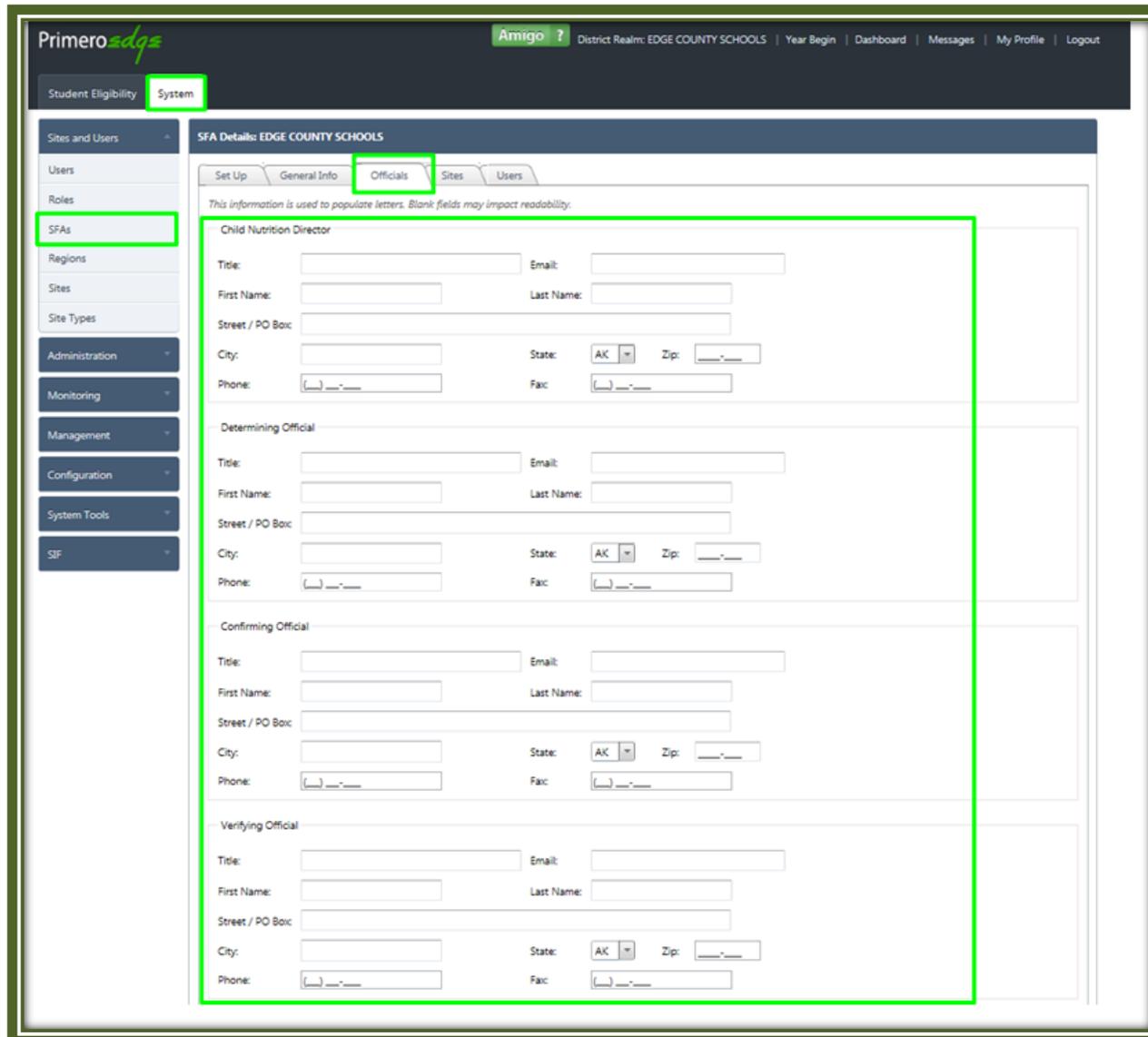
Below the highlighted section is the 'Contract Info' section with the following fields:

- Contract Approval Date: []
- Contract Consultant: []
- Provision 2?: No
- Cycle Year: Year 1
- Verification Sample Method: Standard Required
- SFA Type: Nonprofit/Private Public RCCI without day students RCCI with day students

A 'Save' button is located in the bottom right corner of the form, also highlighted with a green box.

System Tab – Sites and Users – SFA’s – Officials Tab

Direct Certification Letters pull database information from the Officials Tab of the software. Even if the same Child Nutrition Director is also the Determining and Verifying Official make sure all fields are filed in completely.



The screenshot shows the 'Primero sdfs' interface for 'Amigo ?' in the 'District Realm: EDGE COUNTY SCHOOLS'. The 'System' tab is selected in the top navigation bar. On the left sidebar, 'SFA's' is highlighted. The main content area is titled 'SFA Details: EDGE COUNTY SCHOOLS' and has tabs for 'Set Up', 'General Info', 'Officials', 'Sites', and 'Users'. The 'Officials' tab is active, showing a form for entering official information. The form is divided into four sections: 'Child Nutrition Director', 'Determining Official', 'Confirming Official', and 'Verifying Official'. Each section contains fields for Title, Email, First Name, Last Name, Street / PO Box, City, State (dropdown menu set to AK), Zip, Phone, and Fax. A green rectangular box highlights the entire form area.

System Tab – Sites and Users – SFA’s – Officials Tab – Continued

Additional fields on the officials tab are shown here. Make sure they are filled in completely and save in the lower right hand corner.

The screenshot shows a web form with two sections: "Hearing Official" and "Authorized Rep". Each section contains the following fields: Title, Email, First Name, Last Name, Street / PO Box, City, State (a dropdown menu currently set to "AK"), Zip, Phone, and Fax. The phone and fax fields have a format of () - - . A "Save" button is located in the bottom right corner of the form area. A green rectangular box highlights the entire form content area, and a smaller green box highlights the "Save" button.

Student Eligibility – Administration - DC Matching - Previously Matched Tab – Notification Letters

If desired, South Dakota Districts now have the ability to print out and notify previously matched students using PrimeroEdge. Begin by going to Student Eligibility – Administration – DC Matching- Previously Matched Tab. Select the date range for the previously matched students you want to notify, or leave blank to get all previously matched students for the current school year. Select the match methods you wish to notify – in most cases you would select all the match methods and click apply. You can print individual letters by selecting the box to the right of the student, or by selecting the box labeled Print – you can notify all the students. To the right of the Print Selection box is a print preview. Clicking on the print preview will show you the notification letter for that particular student.

The screenshot displays the PrimeroEdge interface for DC Matching. The 'Previously Matched' tab is selected. Search filters include Academic Year (2014 - 2015), Site Code, Site, SSN / Student ID, Last Name, First Name, Grade, and Status. Match Method options are System, Sibling, and Manual, all of which are checked. A 'Print' button is visible in the top right of the table area.

ID	Last Name	First Name	Site	Grade	Match Date	Effective Date	Match Method	Print
101010	Hood	Robin	003	11	5/26/2015	5/26/2015	System	<input checked="" type="checkbox"/>
111111	AnDale	Chip	003	09	5/26/2015	5/26/2015	System	<input checked="" type="checkbox"/>
131313	Nosegrower	Pinocchio	003	09	5/26/2015	5/26/2015	System	<input checked="" type="checkbox"/>
66666	White	Snow	003	10	5/26/2015	5/26/2015	System	<input checked="" type="checkbox"/>
6987432	OTheball	Belle	003	09	5/26/2015	5/26/2015	System	<input checked="" type="checkbox"/>
88888	Poppins	Mary	003	11	5/26/2015	5/26/2015	System	<input checked="" type="checkbox"/>
99999	Pan	Peter	003	12	5/26/2015	5/26/2015	System	<input checked="" type="checkbox"/>
141414	John	Prince	002	08	5/26/2015	5/26/2015	System	<input checked="" type="checkbox"/>
151515	Charming	Prince	002	07	5/27/2015	5/27/2015	System	<input checked="" type="checkbox"/>
161616	Rabbit	Brer	002	06	5/27/2015	5/27/2015	System	<input checked="" type="checkbox"/>

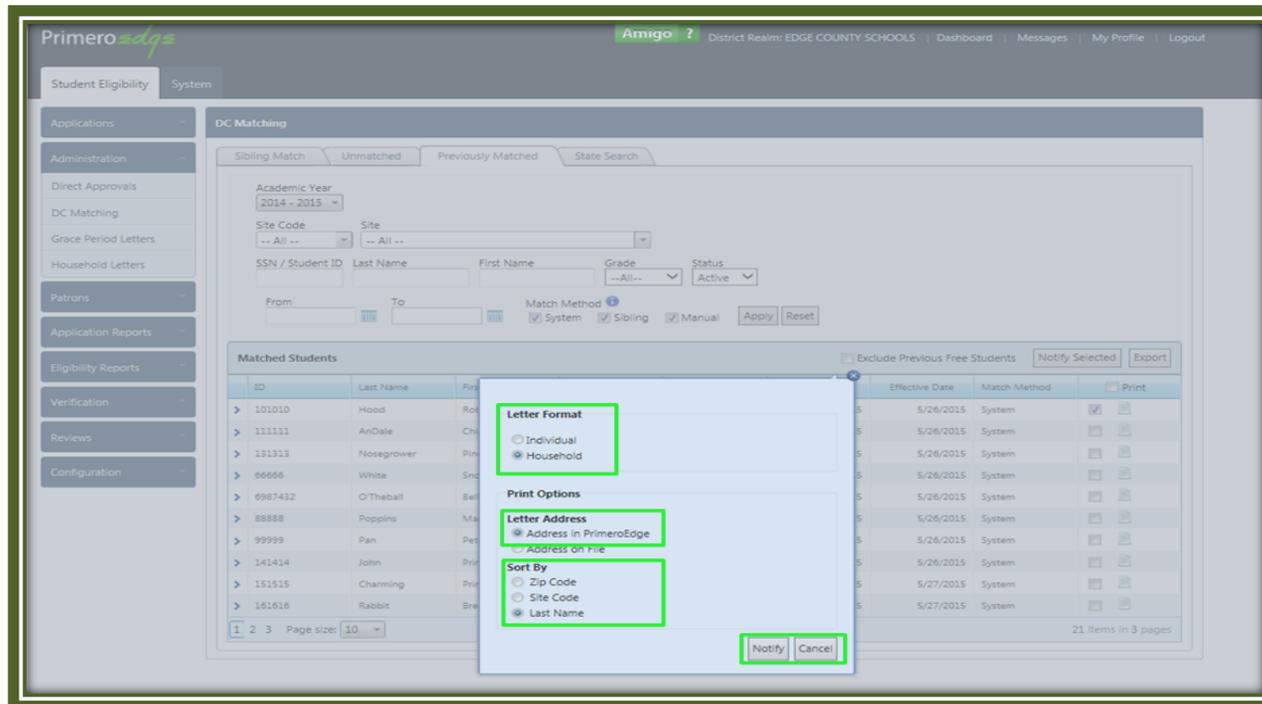
Student Eligibility – Administration - DC Matching - Previously Matched Tab – Notification Letters – Continued

Once you have made your choices and clicked on notify selected, you will get the pop- up box shown below. The 1st choice is for letter format. Household will print one notification letter for all the students in a household, saving paper. Individual will notify all selected students individually.

Letter Address - Address in PrimeroEdge is the correct choice, address on file does not apply as the conditions for a conflicting address are not present.

Sort By – Most people sort by zip code or Last Name. You Choose.

Click on Notify, or Cancel.



TIP – Amigo has a step by step walkthrough for printing Notification letters. Open Amigo, and search “Print Matched Student Letter” to get step by step instructions.

This concludes the training overview of Student Eligibility for South Dakota. You can save this document and refer back to it at any time. Don't forget that Amigo is able to answer and guide you through an amazing amount of questions you could potentially have in using Student Eligibility. For non - critical issues, we can answer questions for you via email at customercare@primeroedge.com

If you need personal assistance I am available from 7 am to 4 PM at our support line which is 866-442-6030.