

# iMATCH

## Direct Certification Matching List Instructions

The iMATCH system has received a few cosmetic changes after recent updates; I wanted to provide some clarification on obtaining your school's direct certification list. Please follow the instructions below, in detail.

Please go to **Student Eligibility** → **Administration** → **DC Matching** → **Matched** tab

The PrimeroEdge software has added some 'exclude' boxes to help with load times.

- When the 'exclude' boxes are selected (as preset), the system would not display the following conditions:
  - Students that have been previously notified by using the automated iMATCH notification letters
  - Transfer students that had benefits in a previous school district
  - Students that had a lower level of benefits (like TANF), and are now matched at a higher level of benefits (like SNAP)

**It would be suggested unselect the 'exclude' checkboxes unless your district regularly uploads a file into an electronic Point of Service system.**

Make sure to have all *Match Methods* checked, then, click **Apply**.

The screenshot shows the iMATCH DC Matching interface. The left sidebar has a menu with 'Student Eligibility' and 'Administration' highlighted in red. The main content area is titled 'DC Matching' and has tabs for 'Potential Matches', 'Sibling Search', 'Matched', and 'File Search'. The 'Matched' tab is selected. Below the tabs, there are fields for 'Academic Year' (2017 - 2018), 'Site Code' (ALL), and 'Site' (ALL). The 'Student Details' section includes fields for Last Name, First Name, ID, and Grade, along with a 'Status' section with 'Active' and 'Inactive' checkboxes. The 'Date' section has radio buttons for 'File', 'Effective', and 'Match', and 'From' and 'To' date pickers. The 'Match Method' section has three checked checkboxes: 'System', 'Sibling', and 'Transfers'. The 'File Details' section has a 'Case Number' field. At the bottom, the 'Options' section has two checked checkboxes: 'Exclude Previously Notified Students' and 'Exclude Previously Free Students'. The 'Apply' button is highlighted in red.

As a reminder, please utilize the Date range when 'Direct Approval' emails are received.

Additionally, you can Export the data into in Excel file. Click **Export**, then **Open** when prompted at the bottom of your screen. An Excel document should open, with a list of students. You can save this file to your computer. Upon saving, you may be prompted to keep the document in the current format. Click **'Yes'**.