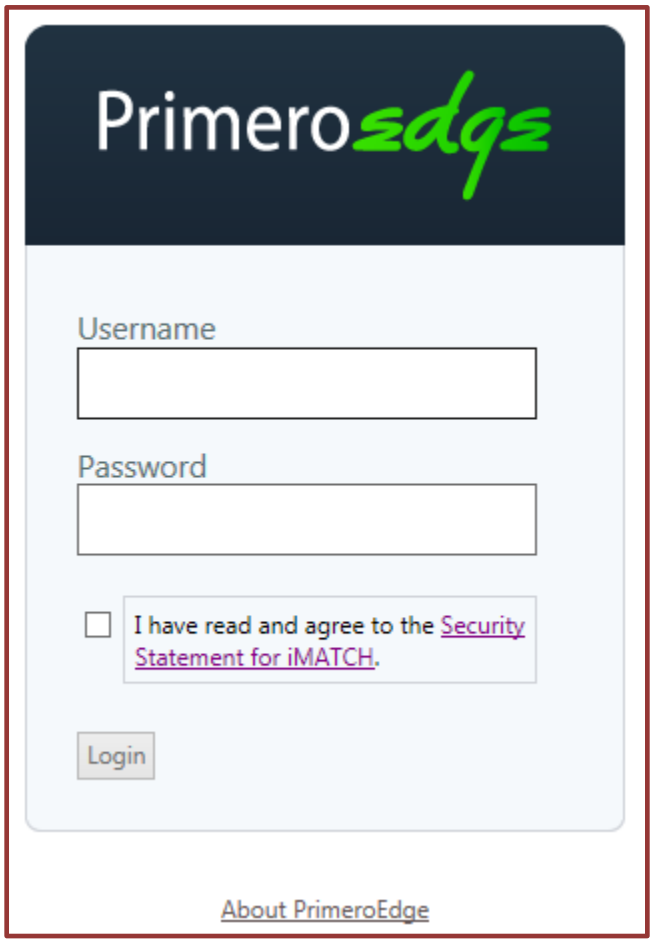
iMATCH

Agency User Manual



Website: https://imatch.sd.gov/login.aspx

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Chapter 1 – Logging in/Creating a Username/Password Reset/Deactivating a Username

Users go to the iMatch webpage https://imatch.sd.gov/login.aspx and enter their User ID and password. The username and password are case sensitive.

- If an employee does not have a User ID, the user can complete a User ID request - iMATCH User ID Request Form
  - The Authorized Representative or Superintendent must sign off on the user add.

iMATCH Sponsor User ID Request

This request is to obtain a new User ID in the electronic system iMATCH to directly certify students' free meal eligibility based on SNAP or TANF. If you have questions, you can call 605-773-3413 or email doe.schoollunch@state.sd.us.

After completing the form, you can submit it through any one of these methods:

- Email: doe.schoollunch@state.sd.us;
- Mail: Child & Adult Nutrition Services, 800 Governors Drive, Pierre, SD 57501
- Fax: 605-773-6846

District/Local Agency Name: _____

CANS Agency Number: _____

Part 1: New User Completes this part:

1. User's First Name: _____ 2. User's Last Name: _____

3. User's Title: ☐ Authorized Representative ☐ Claim Representative ☐ Food Service Manager

☐ Other (list) : _____

4. User's Email Address: _____

5. User's Phone Number: _____ 6. Extension (if used): _____

7. By signing and requesting access to iMATCH, I agree that I will not share my user name or password.

Signature of New User: _____

Part 2: Designation of access. (Authorized Representative or Board President, CEO, Owner, Superintendent, or Tribal Chair of the Local Agency completes this part):

The person named in Part 1 is authorized to act on behalf of the agency for the USDA School Nutrition Programs to determine students that are directly certified as eligible for free meals for School Lunch, School Breakfast, Special Milk, Seamless Summer, or Summer Food Service Program.

1. Check area(s) the individual should have access to for the Programs named above (check all that apply):

☐ Complete and process student matches ☐ View only ☐ Run reports

2. Does this individual replace a previous *iMATCH* user who no longer needs access to the program for your agency?
☐ No ☐ Yes – name of previous user _____(this user will be inactivated)

3. Signature: _____

4. Printed Name: _____

5 .Title: _____ 6. Date: _____

7. Email Address: _____

8. Phone Number: _____ 9. Extension (if used): _____

Upon username creation, the State user will email the username and temporary password to the new user, along with basic system instructions.

Password Reset

- On occasion, an iMATCH user may need a password reset. Simply email DOE.SchoolLunch@state.sd.us requesting a password reset.

Removing a User

- Since data in iMATCH is extremely sensitive, it is important to keep the CANS office aware if a username needs to be inactivated. If an iMATCH user no longer needs access or leaves the district, please notify the CANS office by emailing DOE.SchoolLunch@state.sd.us, requesting the removal of iMATCH access for a specific user.

Chapter 2 – About: Scoring, Matching, Hierarchy

See the basic bulleted information below regarding information about the system.

- Direct Certification system – used by SFAs to identify students eligible for free meal benefits via assistance programs (SNAP, TANF)
- System compares enrollment information from Infinite Campus (or comparable enrollment system) and DSS data nightly, including weekends
- Identical entries between the two files are matched, and listed on the corresponding school district list
- If previously compared files do not have a change in data, the files are not re-compared
    - If a change occurs (like a change in the student's address), the system would re-compare the files and look to make a match

Keep in mind that if a student is matched multiple times/methods during a program year, the student will be excluded from the Matched Tab if the 'exclude' checkboxes are checked. This will be discussed in greater detail in the Matched Tab section.

Scoring Matrix

- Matching occurs based on points of consistency.

Automatic Match = 44 points
High Probability = 37-43 points
Medium Probability = 30-36 points

We will look at point values per fields on the following page.

Below is a list of the point values used to identify matches:

Field	Point Value
SSN	40
Full Name	22
First and Last Name	20
Last and Middle Name	12
First and Middle Name	12
Last Name	10
First Name	10
Birthdate	14
Birthdate (Variable DOB (+/- 10 days)	12
Phonetic First Name	8
Phonetic Last Name	8
SOUNDEX First Name	10
SOUNDEX Last Name	10
Modified First Name	6
Modified Last Name	6
Name Twist Full Name	22
Name Twist First and Last Name	20
Street Address	10
Guardian Name	6
County Code(s)	12

Eligibility Hierarchy

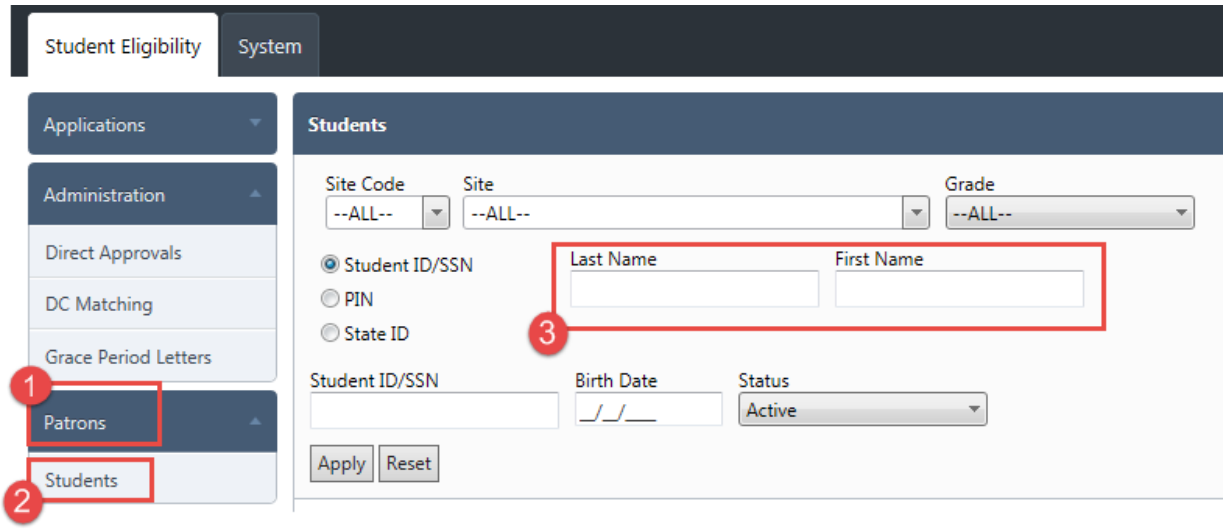
IMATCH identifies the hierarchy of direct certification benefits for the assistance programs that it has access to.

- 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, the school user will receive an email alert, as a new match occurred. Email alerts will be discussed in greater detail shortly.

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

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

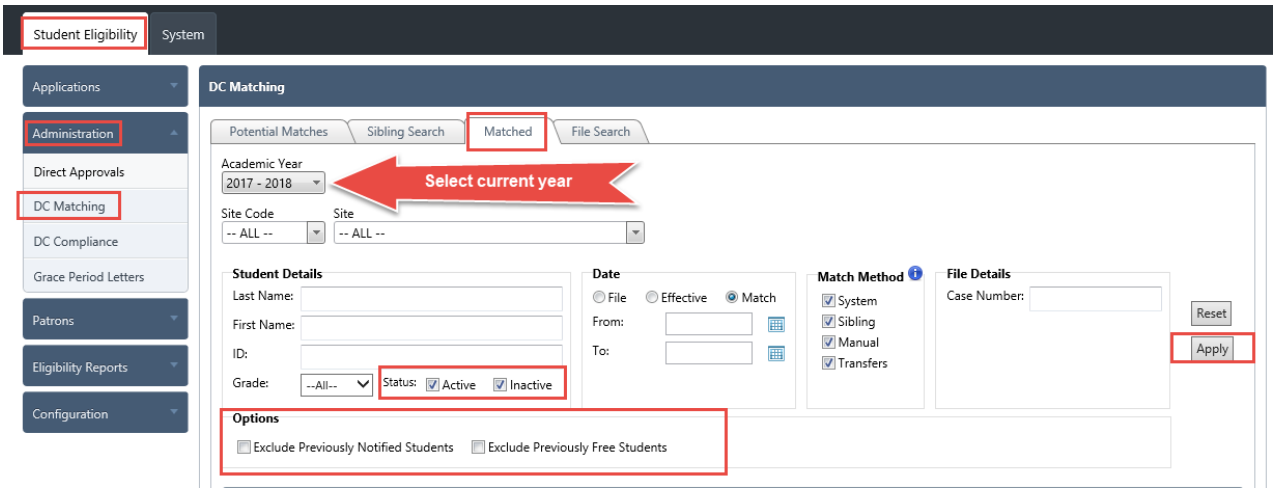


We will discuss this in greater detail in the Patrons section of the handbook.

Chapter 3 – Starting the School Year

Prior to July 1, the CANS office arranges for iMATCH system data to be reset; New matches should occur based on data from the program year starting on July 1 (first day of the program year). Keep in mind that due to the enrollment file and DSS file being uploaded before and after midnight, student matches may have a day lag.

Once data is reset, and new matches occur starting in the new program year, schools should be able to go to their direct certification list (Matched tab), and select ALL students (active and inactive), uncheck 'Exclude checkboxes', and apply.



This should allow for a display of students that have already been matched for the new program year, based on <u>previous enrollment</u> and <u>current DSS data</u>.

Our office has run into an issue in the past where PrimeroEdge got rid of this functionality without notifying us. If 'inactive' matches are not displaying prior to the start of school year, the CANS office has a capable backup procedure to obtain district-specific information.

This method is more labor-intensive, but can serve as a back-up. If matches are not occurring by mid-July, the CANS office will pursue the back-up procedure.

Chapter 4 – New Match Notification Email

The iMATCH system has a notification email, which sends a basic notification to all users in the 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.

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 the school has 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.

Sample email received by schools when new match(es) occur:

From: IMATCH@state.sd.us <IMATCH@state.sd.us>
Sent: Friday, January 20, 2017 2:03 PM
To:
Subject: New Direct Approval Matches for 1/20/2017

Good Afternoon,

You have new Direct Approval matches that are ready to be notified. They can be found by following this path: *Student Eligibility>> Administration >> DC Matching:* Click the previously matched tab, and then check the Exclude Previously Notified Students checkbox.

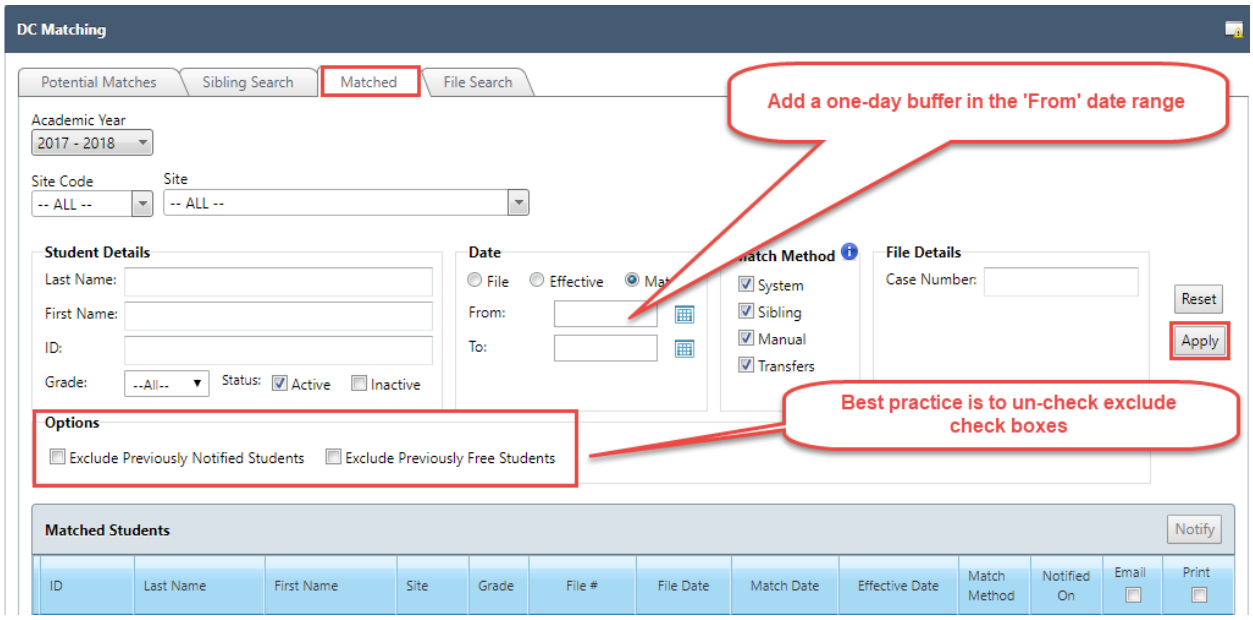
Have a great day!

When checking to see which student was identified in the notification email, go to the Matched tab, and utilize the date range to zero in on the match date identified in the email.

- Be sure to add a one-day buffer in the 'From' date range, and un-check the 'Exclude' checkboxes.

- Student Eligibility → Administration → DC Matching → Matched tab

See the following sample figure:



As a reminder, the notification email will be automatically sent to all active users of the district when at least one new match occurs. If a school receives multiple new matches, only one notification email is sent.

SNAP and TANF matching during year

Keep in mind that if a student previously matched as TANF but later in the year begins qualifying for SNAP, the student will most likely be matched as SNAP, too, prompting a new notification email. School users will only be able to identify this new match by unchecking the 'Exclude' checkboxes.

Transfer students

Additionally, schools would receive an email alert for incoming transfer students which had direct certification benefits in the previous district, however, the incoming transfer student may only be displayed in the direct certification list if the 'Exclude' checkboxes are unchecked.

Chapter 5 – Obtaining the Direct Certification List

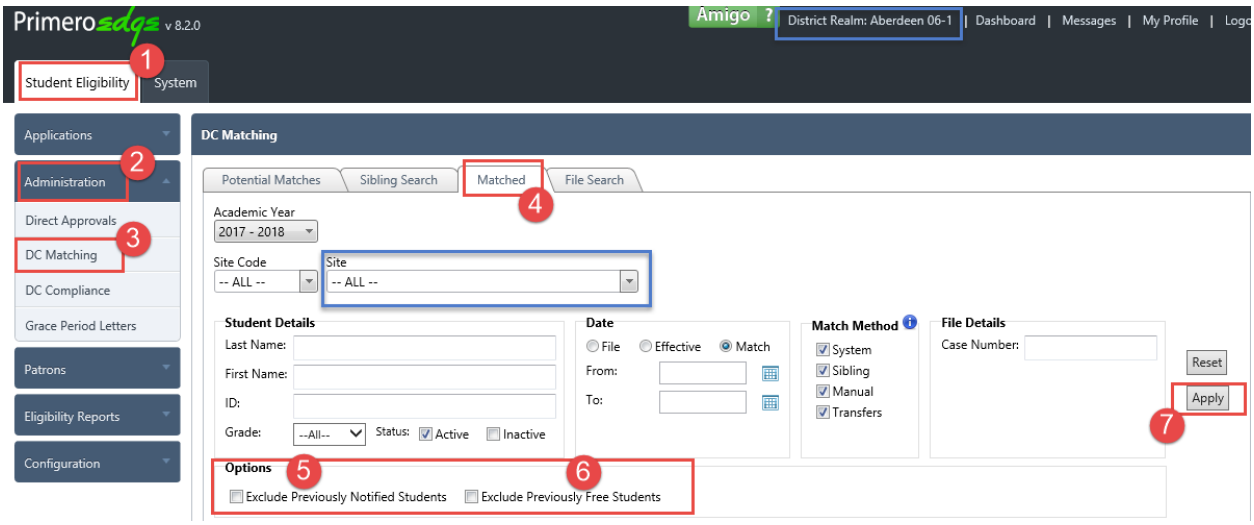
There are multiple ways to obtain the direct certification list. We will identify two methods below:

Upon logging in, make sure you select the District Realm at the top of the screen. School users only have access to their own district realm, however, State users have access to each District's realm, along with the Central realm, which is used for password resets, adding sites, etc.

Select Student eligibility → Administration → DC Matching → Matched tab.

Now, make sure to uncheck the 'Exclude' checkboxes if you would like to see the full DC list. These checkboxes were added to assist with system performance, but most schools still like to see the full list.

Feel free to utilize the site drop down, or the date ranges if needed to zero in on a site or timeframe. Then click Apply. This is the preferred method to obtain the direct certification list.



The 2nd option will be identified on the following page.

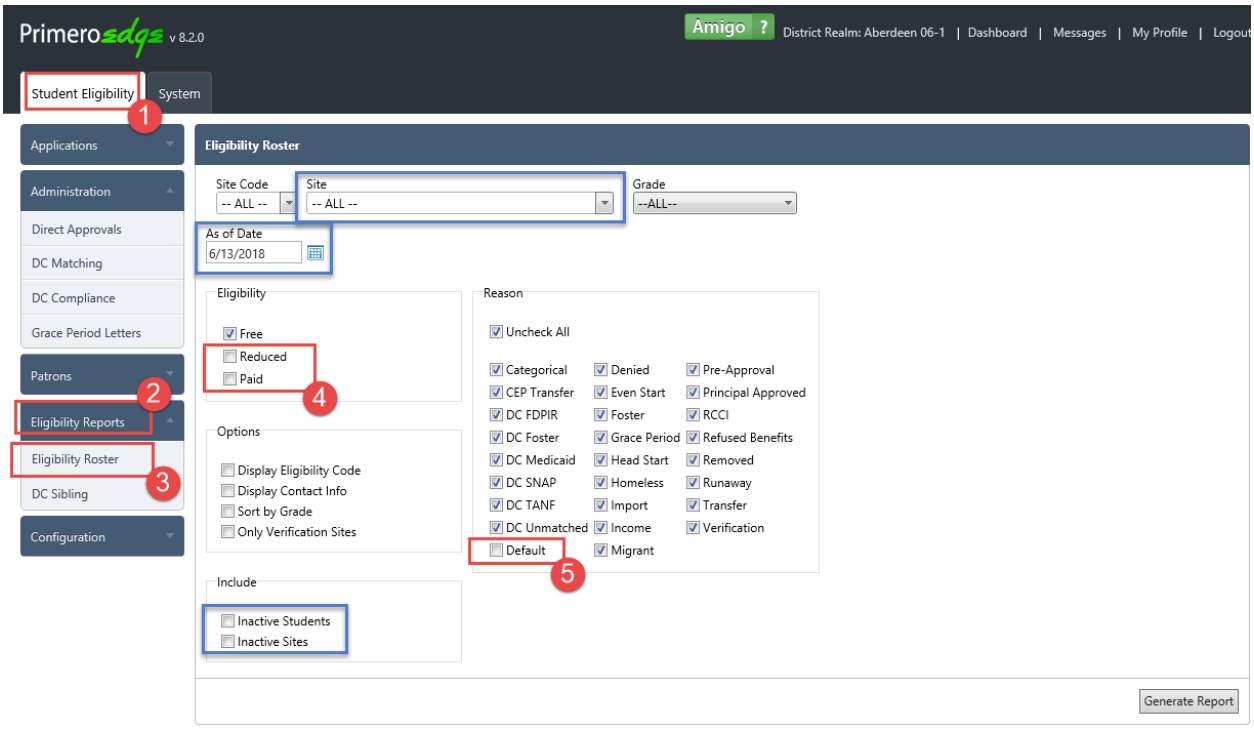
2nd option to obtain direct certification list:

Some schools use this method, however, there is a greater chance of making a mistake when obtaining the list this way.

Upon logging in to iMATCH, select Student Eligibility → Eligibility Reports → Eligibility Roster

Now, make sure to 'uncheck' Reduced and Paid from the Eligibility section, and 'uncheck' Default from the Reason section. 'Default' works as 'paid' in the system; leaving 'Default' checked would result in the system displaying paid students, which is most likely not what is wanted by the user.

Pay special attention to the Site drop down, the As of Date, and the inclusion of Inactive Students. These options may be beneficial if used properly, but can cause some issues selected in error. Generate the Report once all preferred conditions are selected.



NOTE: Exporting the Eligibility Roster report will result in each site being listed on a separate Excel tab; this can come in handy for some tasks with large districts.

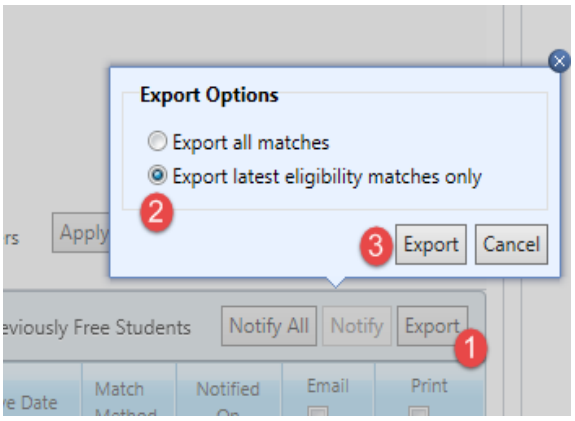
Chapter 6 – Exporting the DC list for Point of Service (POS)

After obtaining the direct certification list, schools can export the list for updating their point of service system or roster.

Please note – for best results with an electronic system, schools may want to utilize the first method to obtain the direct certification list, as identified from the previous chapter.

When the direct certification list is displayed from the Matched tab, you will notice an 'Export' button on the upper right corner of the list. Clicking the export button will prompt two radio buttons from a pop-up window.

- Select 'Export latest eligibility matches only', then click 'Export'.



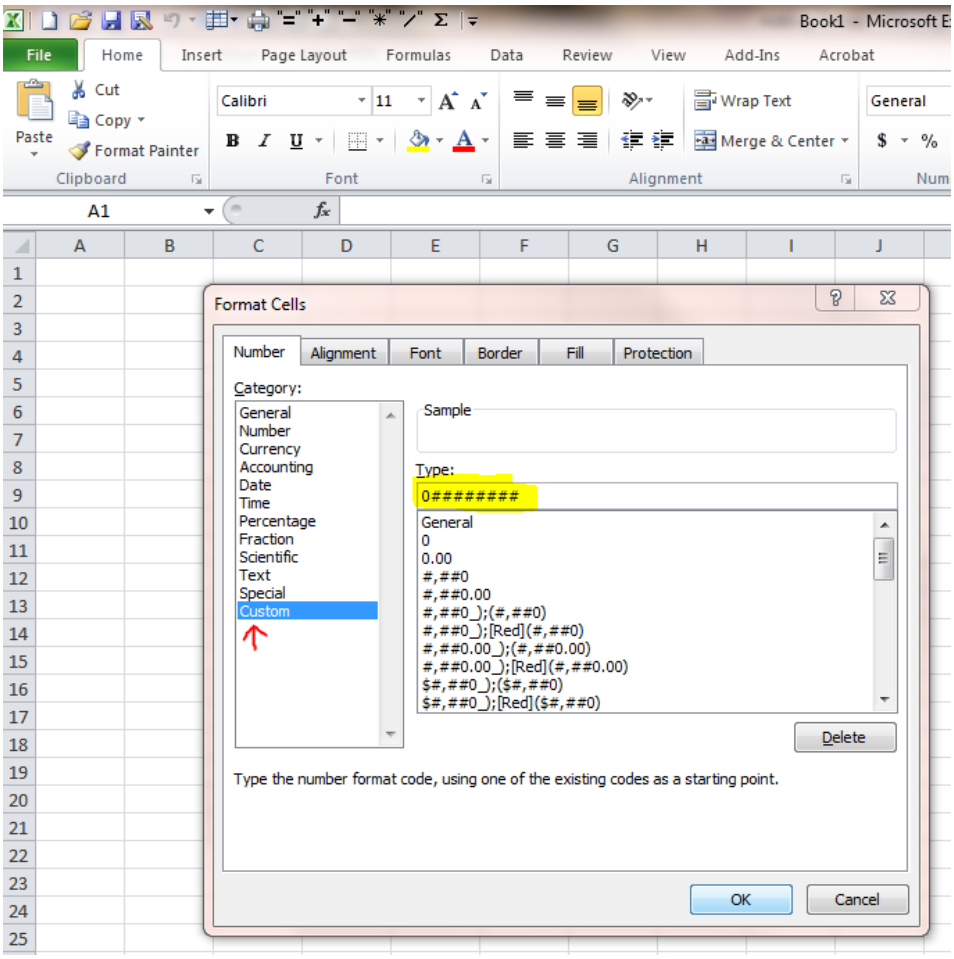
This should generate an Excel document, featuring all students which met the prior conditions of the Matched tab, with the most recent student eligibility displayed.

Pro tip – Importing to POS – lead zero

When exporting your direct certification list from iMATCH for a point of service system upload, please consider the steps and information below. If a student's ID number has a zero as the 1st digit, this zero will most likely not be displayed in an Excel export.

After exporting your student list to Excel, follow the steps below to add the front zero to all IDs.

1. Highlight the column which contains the student ID
2. Right click, select Format Cells
3. Select Custom from the Number tab
4. Type '0########' (lead zero, followed by eight #'s), and click OK



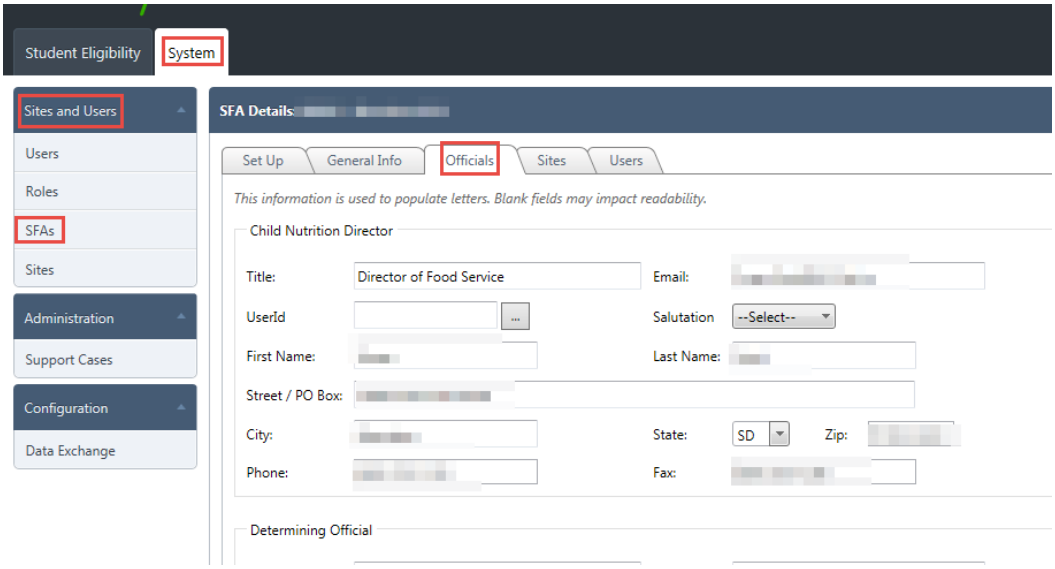
School users will want to consider working with their tech coordinator when importing a direct certification list.

Chapter 7 – Direct Certification Notification Letters

Schools are required to provide notification to households when benefits are issued. Many schools utilize the CANS prototype household application notification letter and direct certification notification letter, as found in the iCAN application, however, some schools use the iMATCH Direct Certification notification letter.

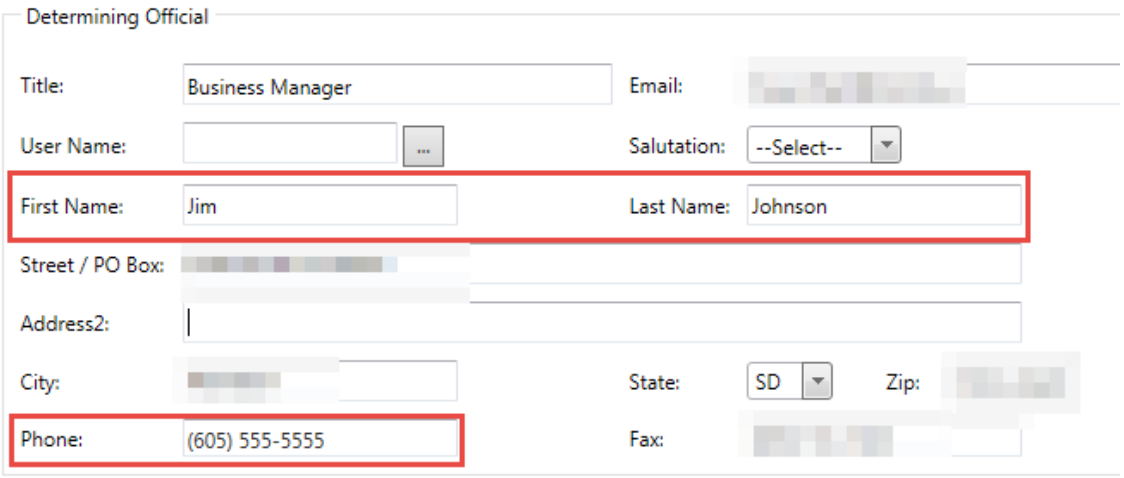
If a school wants to utilize the iMATCH DC notification letter, the school will need to input the Determining Official name within the iMATCH system.

School districts would need to go to the System tab, then select Sites and Users, followed by clicking SFAs. After clicking on SFAs, the district would need to select the Officials tab, as shown on the following screenshot.

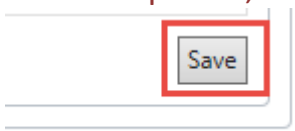


After selecting Officials, the school would scroll down to the Determining Official box.

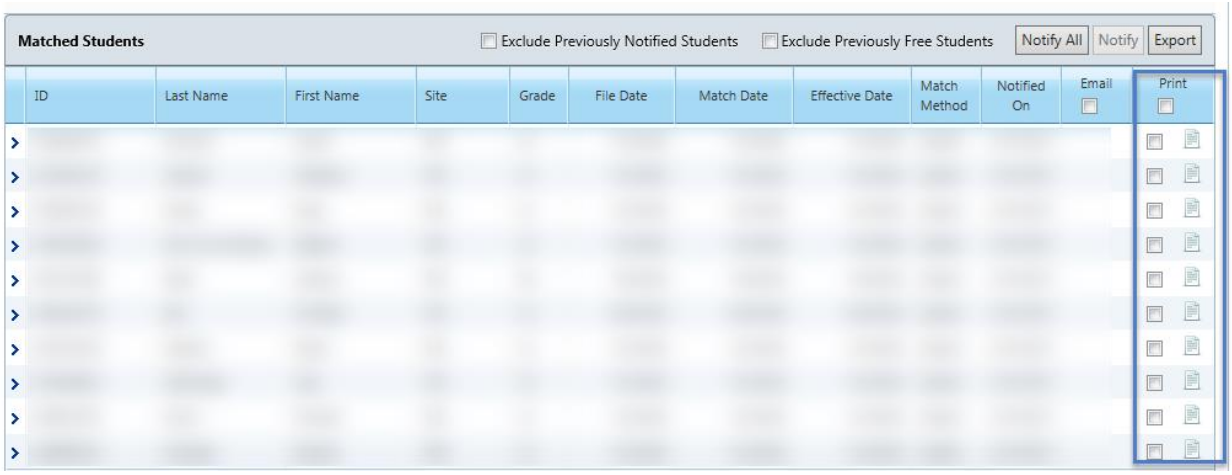
- Enter the first name and last name, and the phone number. These fields will display in the automated DC notification letter from iMATCH.
    - Remember to identify the Determining Official as previously identified in the iCAN system for the annual agreement with CANS.



After completed, the school would need to scroll down, and click 'Save'.



Notification letters can be accessed by clicking on the 'paper' icon from the Matched students list in the Matched tab. Schools can also print all automated direct certification notification letters from iMATCH by selecting the 'print' checkbox.



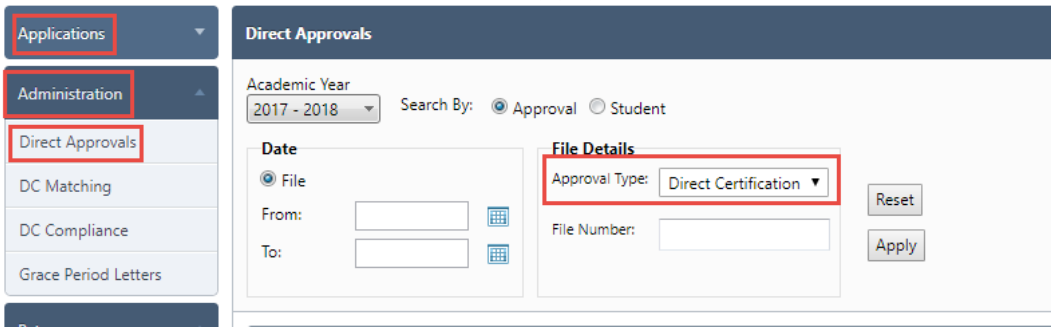
If the school is using the notification letters from iMATCH, it is suggested to look at the Print Preview prior to printing.

- The school computer administrator may need to install a plug-in. If you run into system problems, contact PrimeroEdge may be of some assistance.

Chapter 8 – Direct Approvals

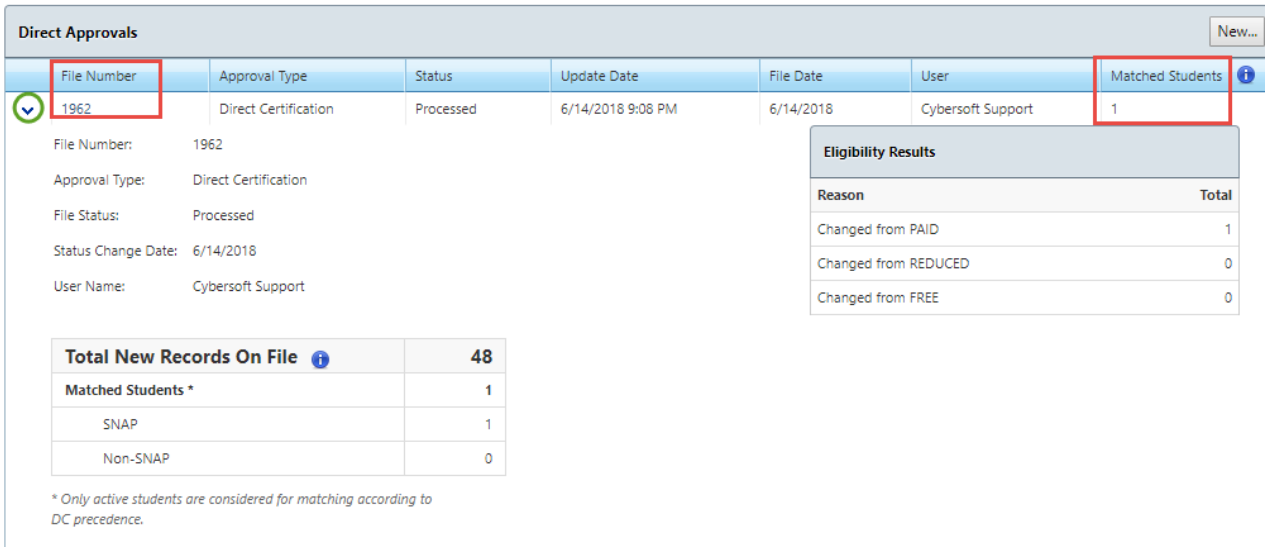
One method that schools can use to determine if a new match has come in to their district on a daily file is the Direct Approvals section.

Once on the Direct Approvals section of iMATCH, schools can select the File Type of Direct Certification, then select Apply.



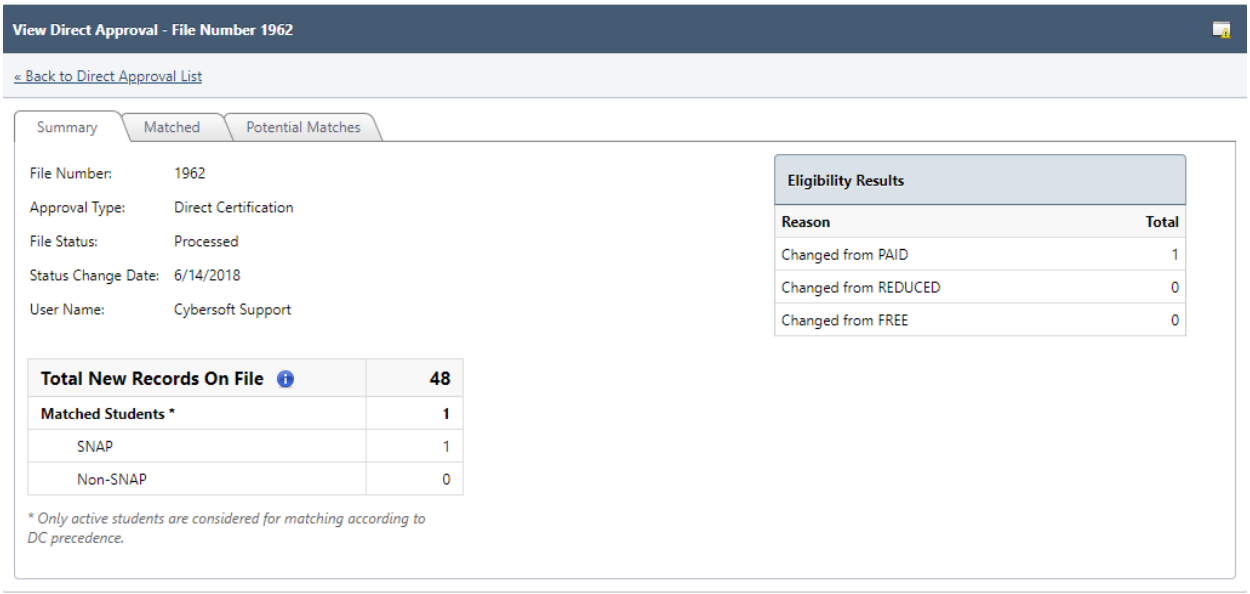
After selecting Apply, the user will see a list of all daily files, organized by File Number.

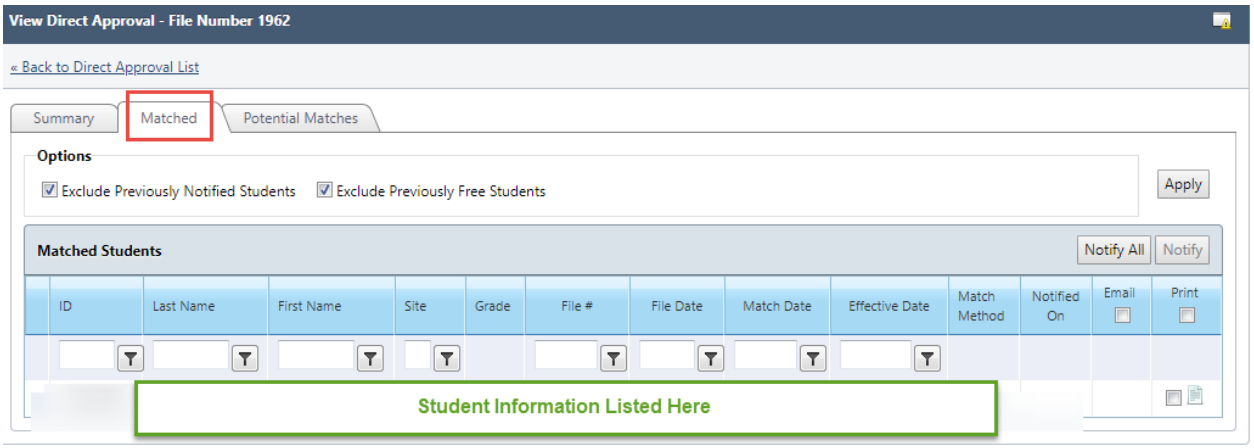
- Each entry will include a File Date, along with a number of Matched Students on the file.
    - The user can select the arrow on the left to see more information about the file specific to the district.



Most schools do not utilize Direct Approvals, as the system provides notification emails to users when a new match has occurred (as discussed in the New Match Notification Email section), but the option is available.

Selecting the File Number will provide a Summary, along with a listing of the students matched, and any potential matches which are tied to the daily file.





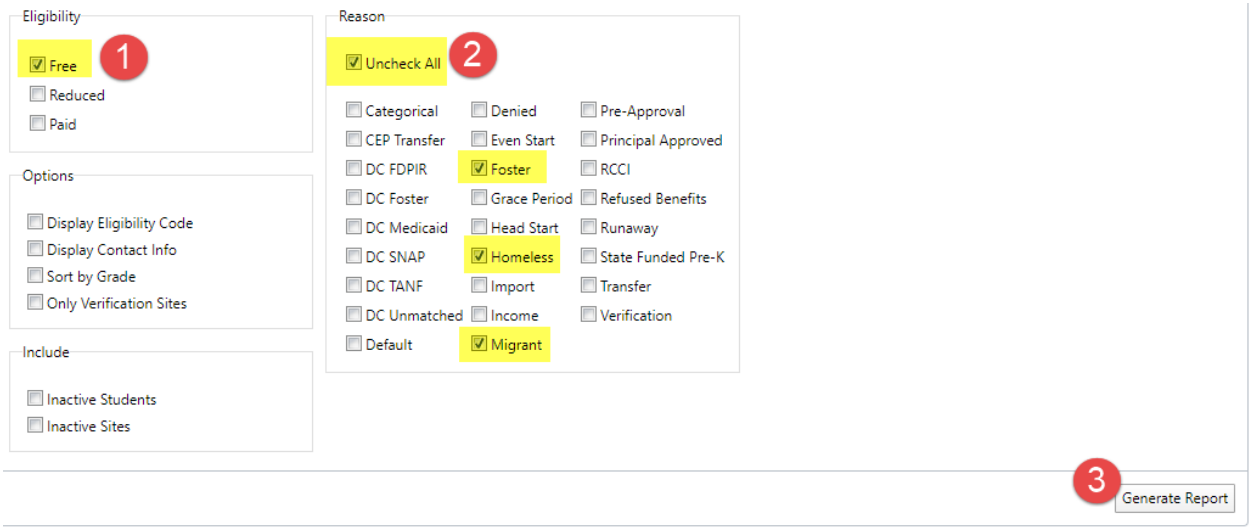
Chapter 9 – Obtaining Foster/Homeless/Migrant Matches

Matches for Foster, Homeless, and Migrant can now be found in the iMATCH system. CANS will load matches very sparingly during the school year, typically around October.

Currently, these matches can be found in the Eligibility Roster and in the Direct Approvals section. Below are instructions on how to observe these matches thru both methods:

Eligibility Roster:
Student Eligibility → Eligibility Reports → Eligibility Roster

Once on the Eligibility Roster page, be sure to only check 'Free' for Eligibility, and only check 'Foster', 'Homeless', and 'Migrant' for Reason, then click 'Generate Report':



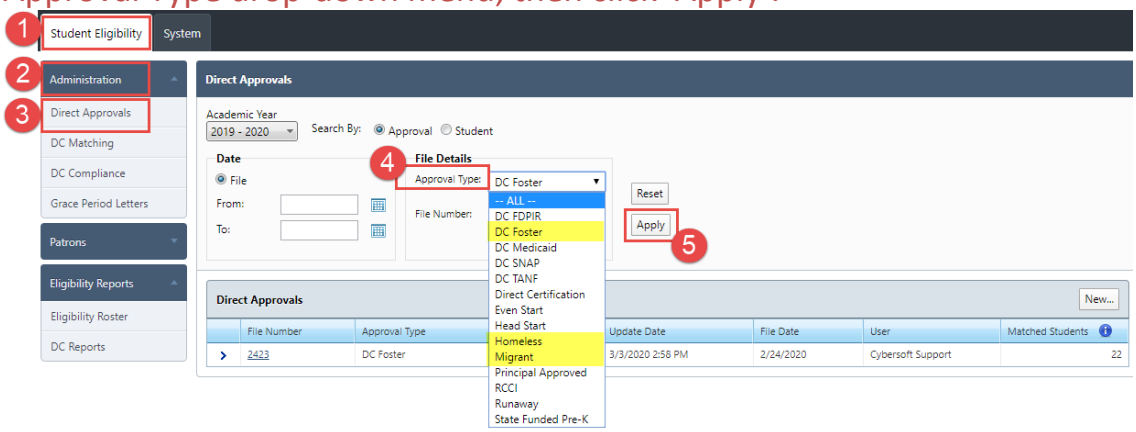
Once the Eligibility Roster is generated, the user can export the file into Excel by clicking the save disk, then selecting Excel.

Keep in mind that once generated, the Eligibility Roster will display a different school site on each page/tab. Through this method, the user would need to page through to see the Foster, Homeless, and Migrant matches at each individual site.

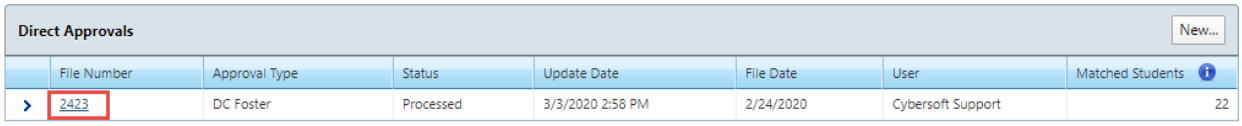
Below is a different method to obtain the full list of Homeless, Migrant, and Foster students.

Direct Approvals:
Student Eligibility → Administration → Direct Approvals

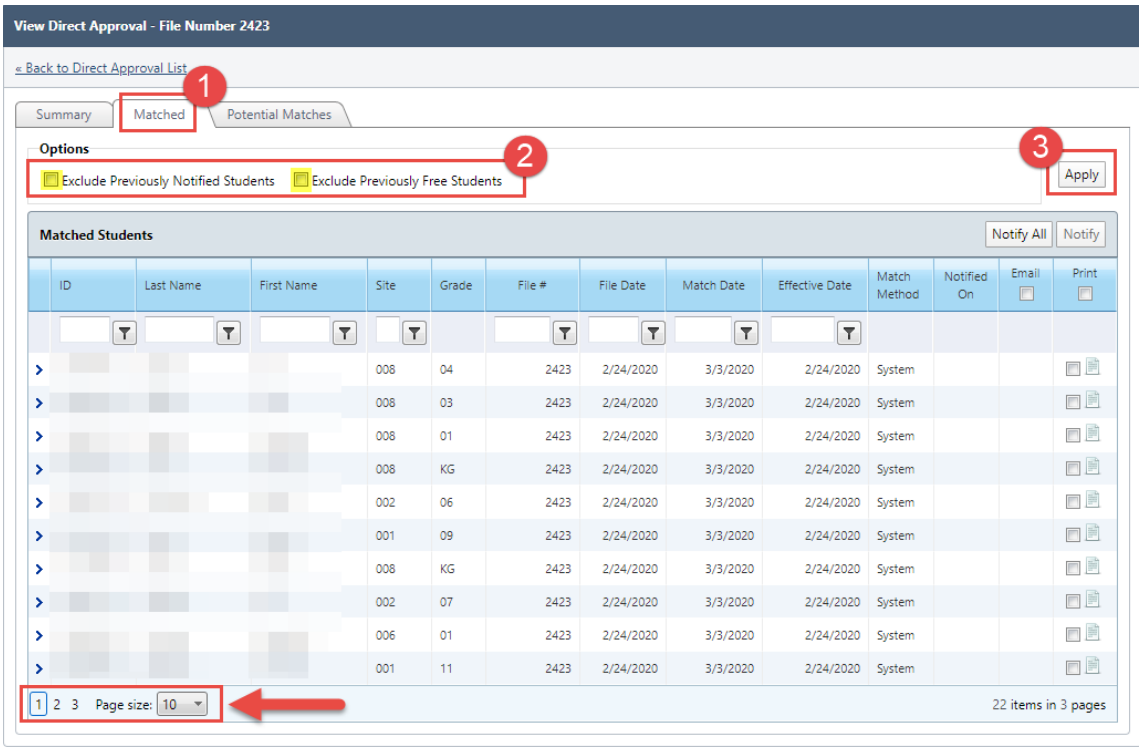
Once 'Direct Approvals' is selected, select Foster, Homeless, or Migrant from the Approval Type drop-down menu, then click 'Apply'.



After selecting one of Foster, Homeless, or Migrant and clicking Apply, the file(s) for the selected Approval Type will be displayed. Select the File Number:



Once the File Number is selected, the user will have the opportunity to view the Direct Approval by selecting 'Matched'. As always, remember to uncheck the 'Exclude' checkboxes, and click 'Apply'. Continue on the following page.



Now we can see all of the students within the selected Approval Type in one location. Keep in mind the number of pages, and the page size.

Continue with these steps for the remaining approval types of Foster, Homeless, and Migrant.

Chapter 10 – Considering 'Potential Matches'

The iMATCH system automatically compares school enrollment information with a list of children (up to age 21 during the school year) from Department of Social Services that receive benefits.

- Compared criteria have certain 'point values' assigned. When the comparison of the two files reaches 44 points of consistency, an automatic match occurs.

If the comparison of the enrollment file and direct certification file result in consistency of 30 to 43 pts, the comparison of files are organized in the Potential Matches tab for school determination.

- 37 to 43 points of consistency is denoted by High probability.
- 30 to 36 points of consistency is denoted by Medium probability.

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.

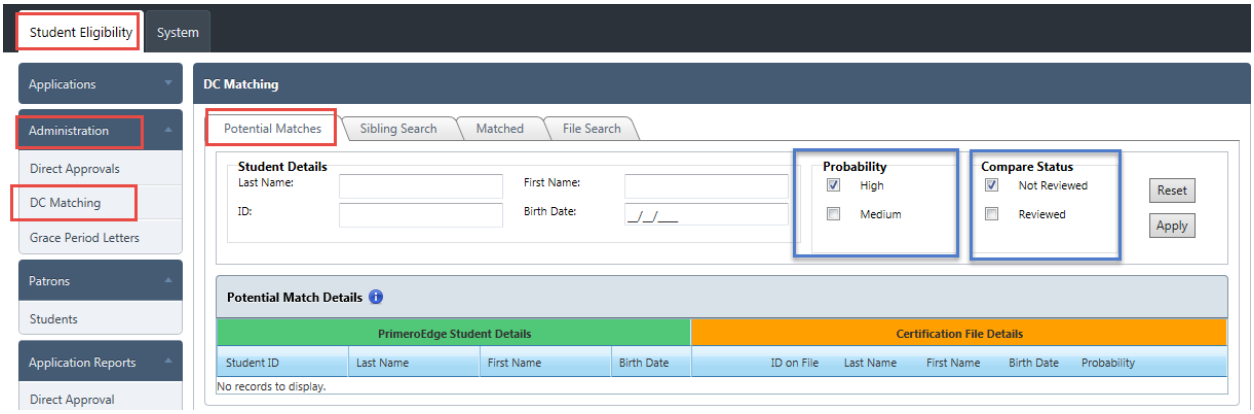
To access Potential Matches, select Student Eligibility → Administration → DC Matching → Potential Matches

Prior to observing the Potential Matches list, the school 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.

- This would be ideal for a user when a potential match has been determined to not be an actual match, and the user does not the false potential match to be displayed in the future.

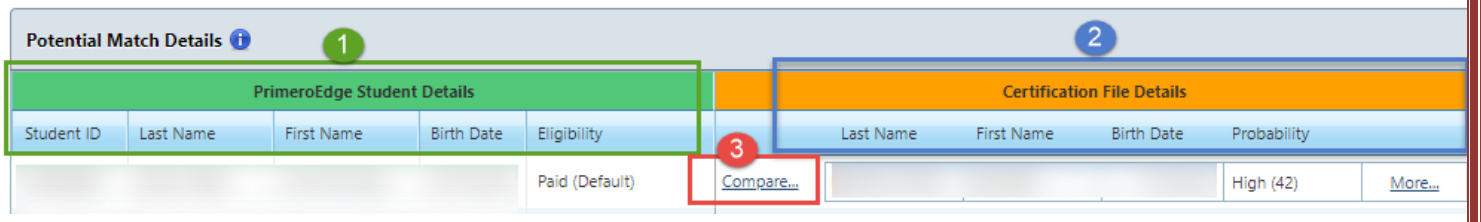
See the following screenshot for a display of the Potential Matches tab.



As previously indicated, the Potential Matches list provides a list of students that have a high/medium 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.

After clicking Apply, student records will be displayed on the left side, and the right side.



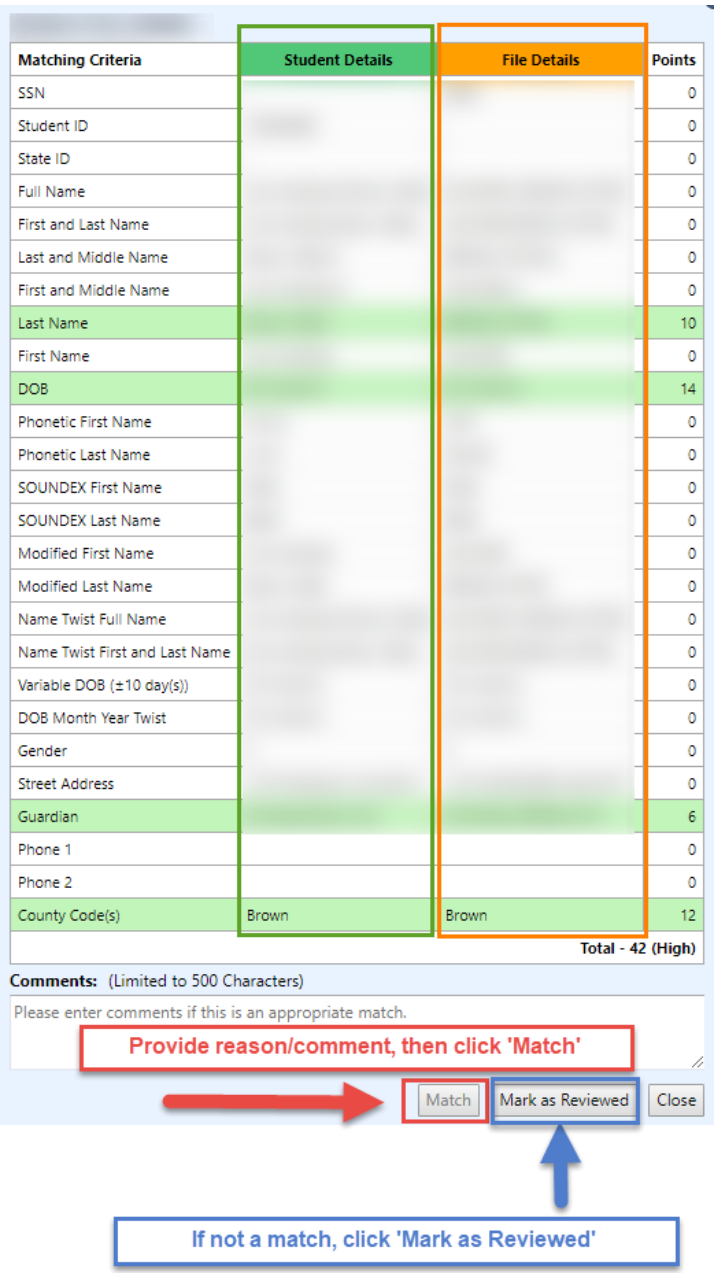
The column on the left, labeled 'PrimeroEdge Student Details' (identified on the slide by the green border and number 1) is the enrollment file from the school's Infinite Campus (or comparable enrollment system/list).

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. It is now on the school to make the final determination.

You will see a link toward the middle of the two lists, labelled *'Compare'*. This link is identified in the above figure by the red border and number 3 of the previous figure.

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.



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

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.

If the school has determined that the student record identified in the enrollment file from the Student Details column is the same student as the student record 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 the screenshot by the red border, and red arrow in the previous figure.

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.

Chapter 11 – Sibling Search Feature

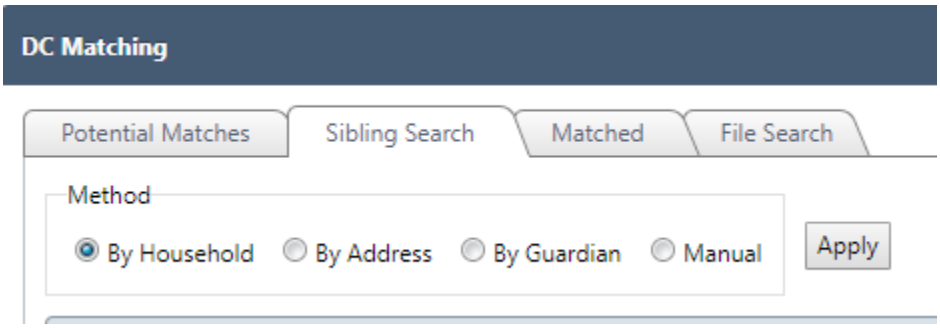
Sibling Search is another feature which can help find matches, however, most schools may extend benefits outside of iMATCH, assuming the school knows the household makeup. Other schools may utilize the File Search tab, instead.

It is extremely important to remember that when utilizing the Sibling Search, the operator must be able to determine whether to process the match.

- The iMATCH system may make a logical pairing of an identified student with other potential students, but the operator must be able to ensure that the pairing is appropriate prior to processing the match.

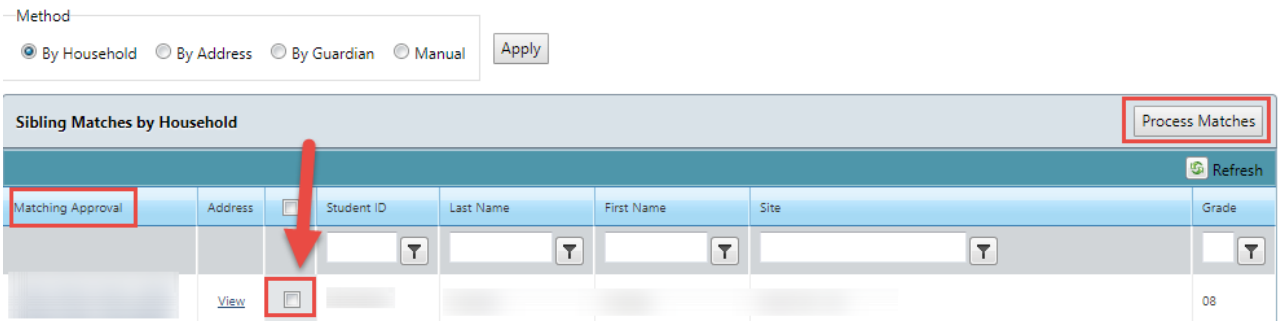
When in Sibling Search, the operator selects the appropriate radio button, identifying the type of method to use.

- Methods include Household, By Address, By Guardian, and Manual.



After selecting the Method and clicking 'Apply', student records will be displayed.

- The name displayed on the left is the 'Matching Approval', meaning the identified student(s).
- The name displayed on the right is the student that is not recognized as having benefits.



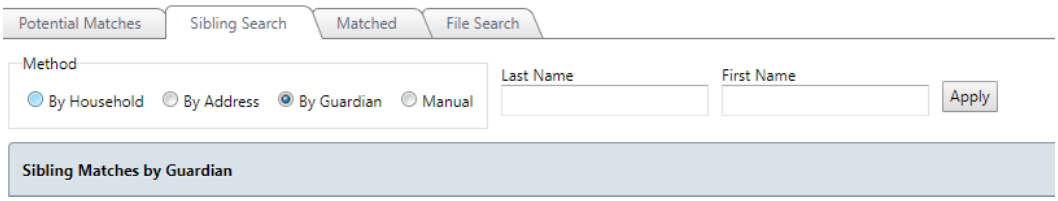
If the operator has identified that the student(s) listed in the Matching Approval column (left side) are members of the same household as the student without benefits on the right of the selector box (identified by the red arrow), the operator can make the match.

To make the match, the operator must check the 'selector box', and click Process Matches.

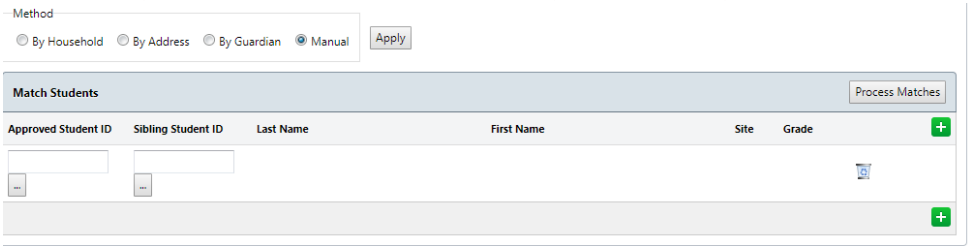
Again, the operator should only complete this task if they can ensure that the students in the Matching Approval column side are in the same household as the student on the right side of the selector box.

When searching by *Address*, the same rules apply, however, the By Address radio button provides an opportunity to require a consistent Last Name; this may or may not be helpful.

When searching By *Guardian*, the operator must enter the guardian's name.



When searching by *Manual*, the operator must know the Approved Student's ID, and the unapproved Student's ID. This may not be the most convenient method of making a match based on a Sibling, but the option is available.



Chapter 12 – File Search Feature

The File Search tab has come in handy to many schools. Schools have the capability to search students and validate case numbers.

An ideal use of the File Search tab would be to search a case number if a household submits a household application with a case number listed.

- If the school can validate the case number, the school can consider the household as directly certified.

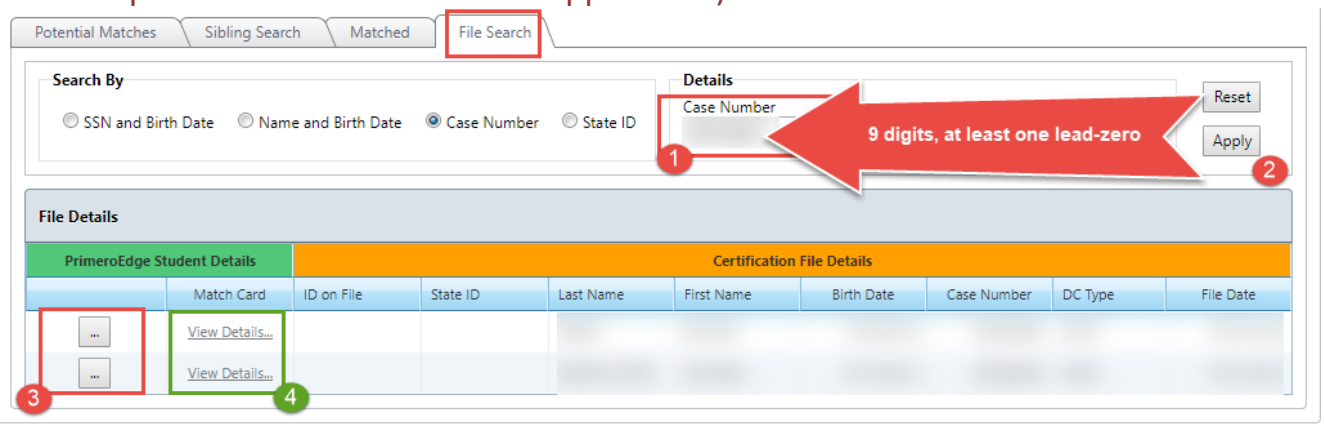
To validate a case number:

Select the File Search tab from DC Matching, then select the Case Number radio button.

In the Case Number box, enter the nine-digit lead zero case number.

- All SNAP and TANF case numbers are nine digits long, with at least one lead zero.

If the household provided a case number less than nine digits, try to fill in the missing digits with lead zeros (such as adding three lead zeros to a six-digit number provided on the household application).

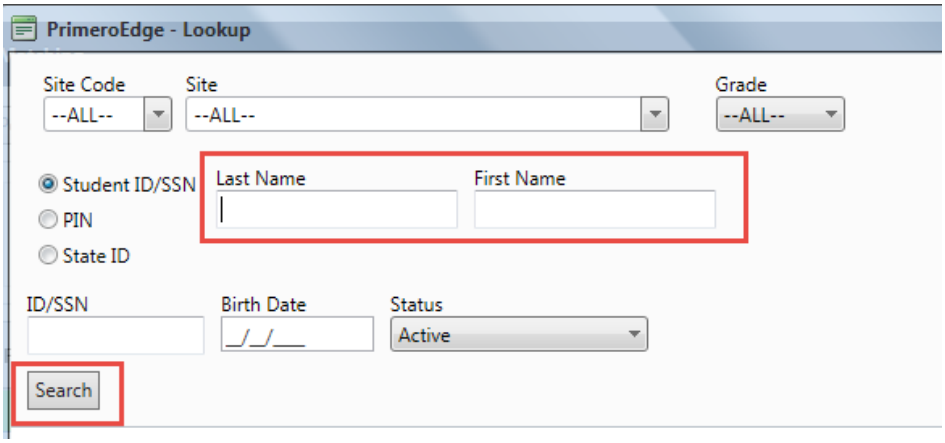


Click Apply, and compare results with the submitted application.

- If results are accurate, the school has validated the case number, and can consider the household as Directly Certified.

- If no results are found, the school should contact the CANS office for further reviewing. We will touch more on this topic in the 'Tracking Down a Student' section of this manual.

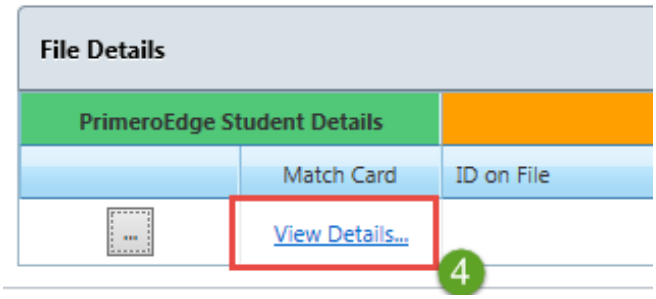
You can conduct a manual match from the File Search tab by clicking on the ellipses (identified by number 3). This will bring up the 'Lookup page', as seen below:



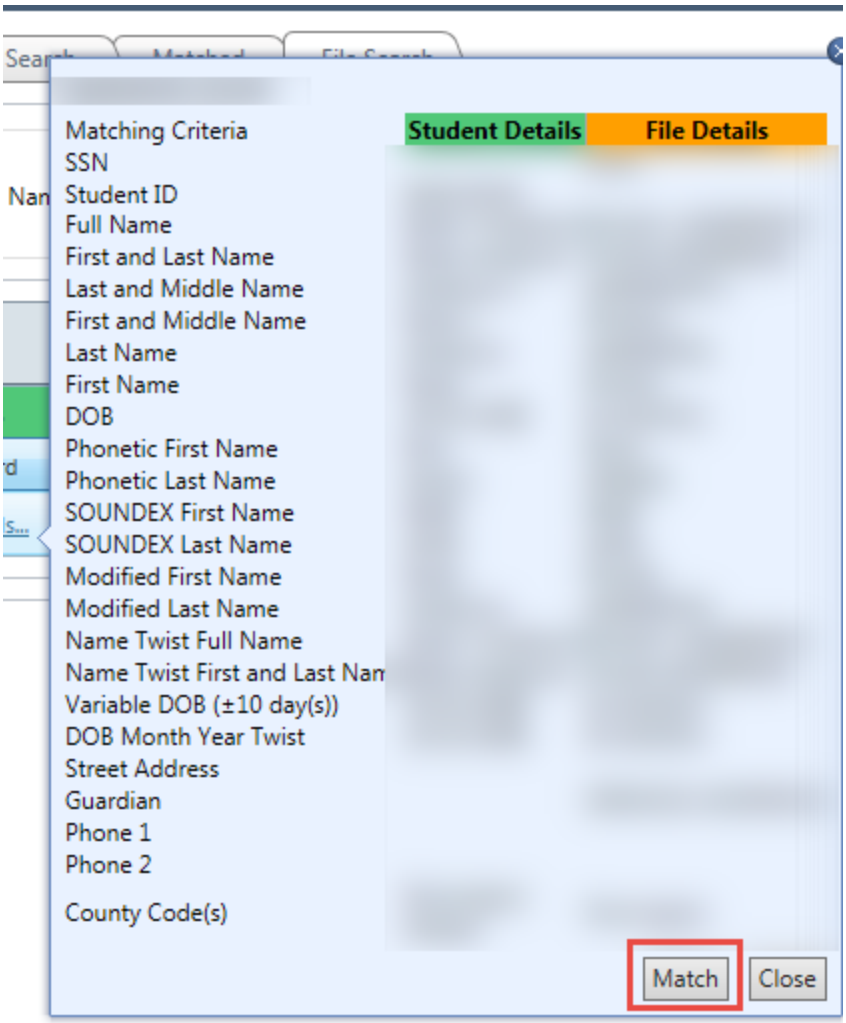
Search the student name from your enrollment information. Consider potential misspellings – you do not need the full first and last name to search in this spot.

Once you have found the student, select the student record from the look-up, and you will be brought back to the File Details section.

From here, you are prompted to View Details (before, the option was grayed out, as the system did not have an enrolled student to compare with).



After clicking View Details, a scorecard will be displayed, very similar to that of the Potential Matches section. Compare the data and make the Manual Match.



Most likely, if no results were displayed from the original File Search of the case number, the provided case number is not valid.

- The school's next step would be to notify the household that the case number provided is not valid in the system, and ask for the household to provide a copy of the SNAP letter.

If the household can provide the letter, have the school send a copy of the letter to the CANS office.

- There have been situations in the past where a household may have 'zero SNAP benefits', meaning the household started the process of obtaining SNAP benefits, but is still not receiving assistance.
    - The household may have received a SNAP letter as indication of the household being entered into the SNAP office's system, but the letter may indicate benefit assistance of $0.00.

- In this case, the household would not be eligible for benefits, assuming a household member is not being displayed in the iMATCH system.

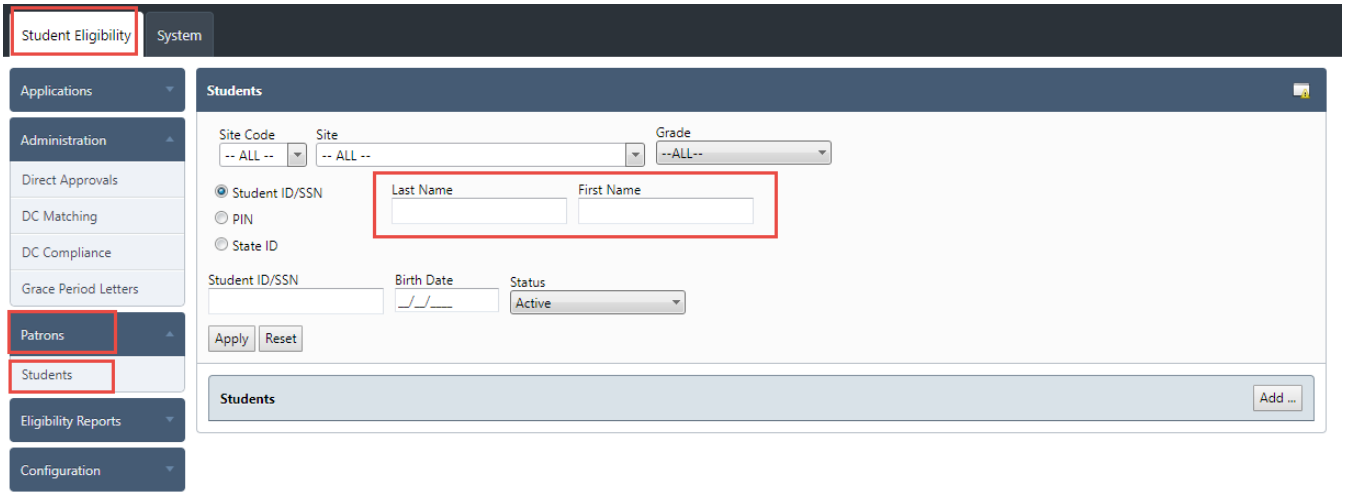
As a reminder, eligibility is year-long, meaning that if a household qualifies for free or reduced-price meals, the household will maintain their level of benefits for the duration of the school year (and up to 30 operating days of the following year), even if the household does not meet assistance program/income requirements mid-year.

- In other words, if a household with SNAP is receiving free meals, but then drops their SNAP benefits mid-year, the household will be able to still maintain their free meal eligibility throughout the year.
- Additionally, once a student appears on the iMATCH direct certification list, they will stay on the direct certification list for the duration of the year (as long as they are enrolled).

The File Search tab also has Name/Birth Date and SSN/Birth Date search options; schools would need to know required information to search any of the fields in the File Search tab. Also, the File Search tab is a state-wide search, which is beneficial for schools that receive frequent transfer students.

Chapter 13 – Patrons Section

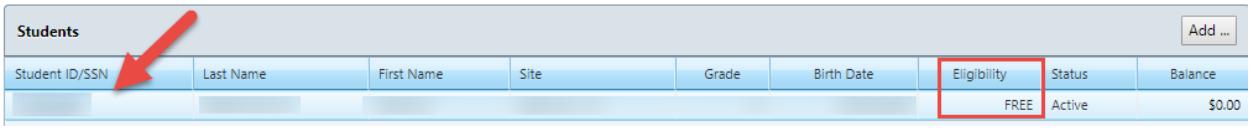
The Patrons section of iMATCH can be beneficial when researching a student for a school.



The Patrons section contains student enrollment, however, also includes some historical data for per-student eligibility.

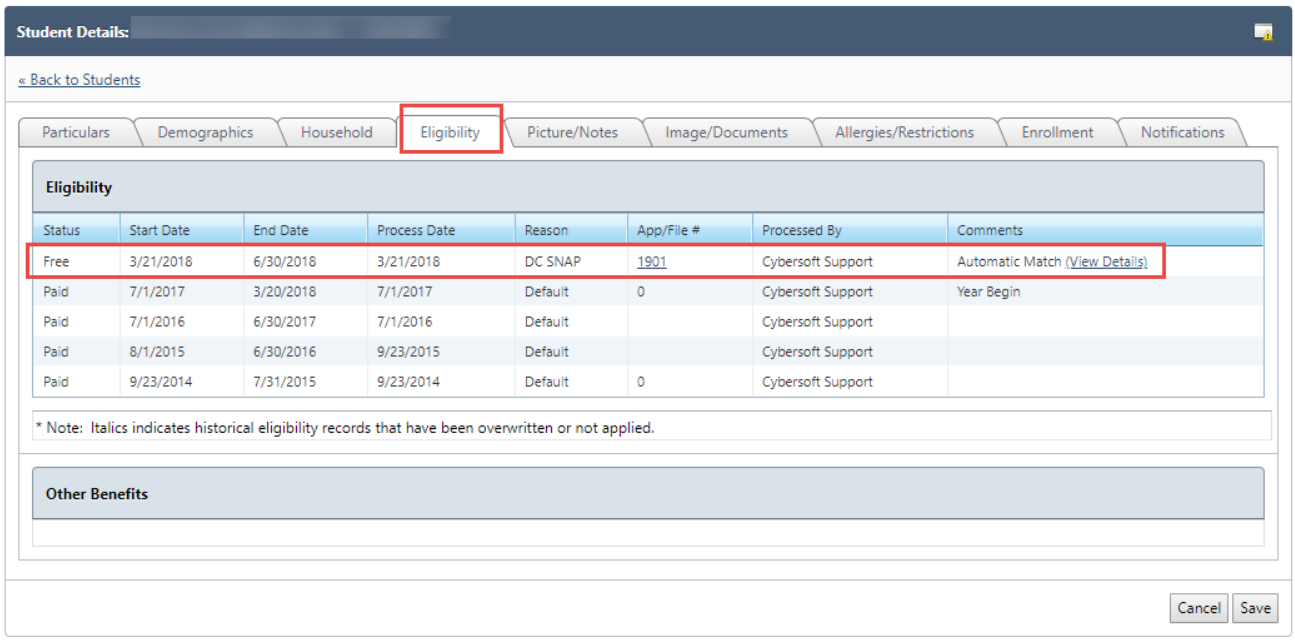
Search the student's name, and click Apply; then select the Student ID.

- As we can see, the results also display the student's current eligibility, if identified in iMATCH.
    - Eligibility would not properly display if the student is eligible based on income, or the student's eligibility is not recognized in iMATCH.



We will continue with the Patrons section on the following page.

After clicking on the Student ID, select the Eligibility tab. The tab will now display a historical record of the student's eligibility.



This information can be used to identify valuable information, such as – if a student switches from TANF to SNAP mid-year, how a match occurred, pertinent file dates, and more.

- This information has come in handy when trouble-shooting student match display dates.

When operating within the Patrons tab, be very cautious as to not make any adjustments to the student record.