

# CEP Timeline and iMATCH Basics

January 31<sup>st</sup>, 2018

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This institution is an equal opportunity provider.

# Welcome

- Introductions
- Roll Call

# Overview

- CEP Basics
- CEP Timeline
- iMATCH Basics
- FDPIR
- Homeless/Migrant
- Helpful Hints
- Questions



# Community Eligibility Provision (CEP) Basics

- Once CEP is elected, you maintain your Identified Student Percentage (ISP) and claiming percentages for 4 years
- Unlike Provisions 2 and 3, there are no CEP Extensions after 4 years – you must re-apply
- During your 4-year cycle, you may re-apply to achieve a higher ISP and claiming percentages
- If you do not re-apply for CEP, you will return to standard counting and claiming methods

# CEP Claiming Percentages

- Your ISP is multiplied by 1.6 to determine your free claiming percentage
- If it is less than 100%, the difference is claimed at the paid rate
- Example: an ISP of 57.3% x 1.6 = a free claiming percentage of 91.68%
- 100% - 91.68% = a paid claiming percentage of 8.32%



# CEP Timeline

- January – April: Work in the iMATCH system to make matches
- April 1: Date that is used for CEP Data Reporting
- Beginning April 2<sup>nd</sup>: Apply for CEP and submit documentation to be approved
- June 30<sup>th</sup>: Final day to submit documentation to apply for CEP



# CEP Timeline Continued

- June 30<sup>th</sup> – Start of School: A mandatory CEP Year 1 Training will be held
  - Attendance at this training is required to be approved for CEP
- After the school year begins: If your school is not on the administrative review list to receive a full review, you will receive an abbreviated administrative review



# About iMATCH

- 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 and DSS data nightly
- Identical entries between the two files are matched, and listed on the corresponding school district list



# Obtaining the Direct Certification List

- Student Eligibility
- Administration
- DC Matching
- Matched - All Match Methods selected

The screenshot shows the 'Student Eligibility System' interface. The left sidebar contains a navigation menu with the following items: Applications, Administration, Direct Approvals, DC Matching, Grace Period Letters, Patrons, Application Reports, Eligibility Reports, and Configuration. The 'DC Matching' section is active, showing tabs for 'Potential Matches', 'Sibling Search', 'Matched', and 'File Search'. The 'Matched' tab is selected. The main content area includes the following fields and options:

- Academic Year:** 2017 - 2018
- Site Code:** -- ALL --
- Site:** -- ALL --
- Student Details:** Last Name, First Name, ID, Grader: --All--
- Status:**  Active  Inactive
- Date:**  File  Effective  Match. From: [calendar icon] To: [calendar icon]
- Match Method:**  System,  Sibling,  Manual,  Transfers
- File Details:** Case Number: [input field]
- Options:**  Exclude Previously Notified Students,  Exclude Previously Free Students
- Buttons:** Reset, Apply

# Exclude Checkboxes

- Un-check the Exclude Checkboxes

**DC Matching**

Potential Matches | Sibling Search | **Matched** | File Search

Academic Year: 2017 - 2018

Site Code: -- ALL -- | Site: -- ALL --

**Student Details**

Last Name:

First Name:

ID:

Grade: --All-- | Status:  Active  Inactive

**Date**

File  Effective  Match

From:

To:

**Match Method**

System

Sibling

Manual

Transfers

**File Details**

Case Number:

Reset

Apply

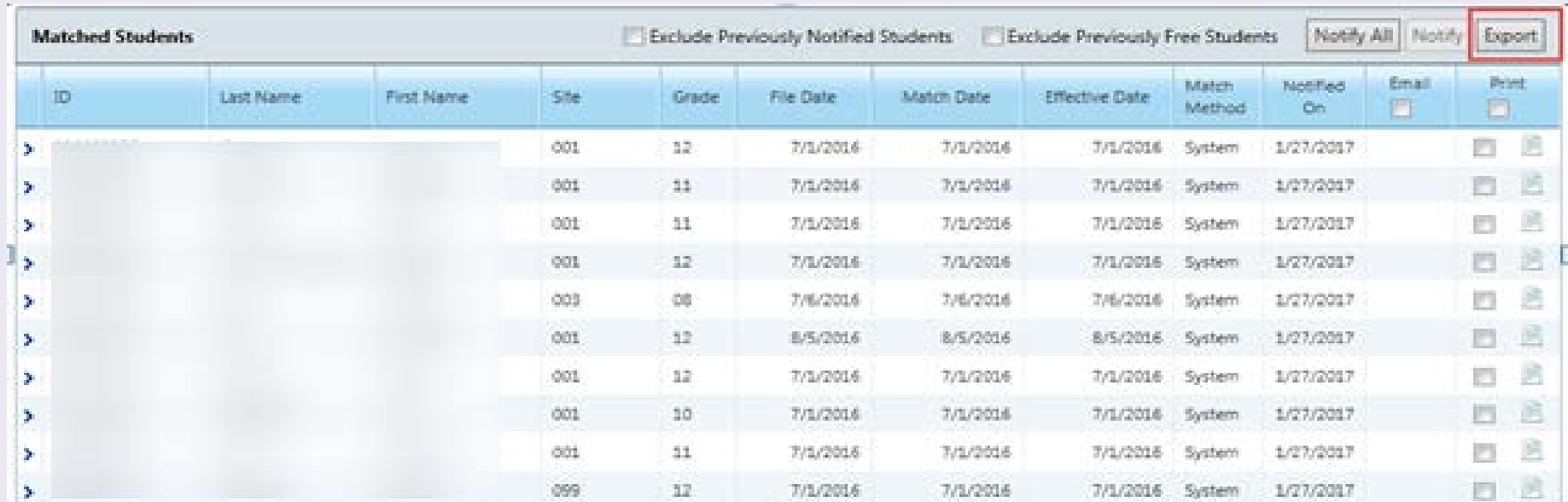
**Options**

Exclude Previously Notified Students





















Exclude Previously Free Students

# Obtaining the Direct Certification List: Exporting

- Export allows to save full list in Excel format

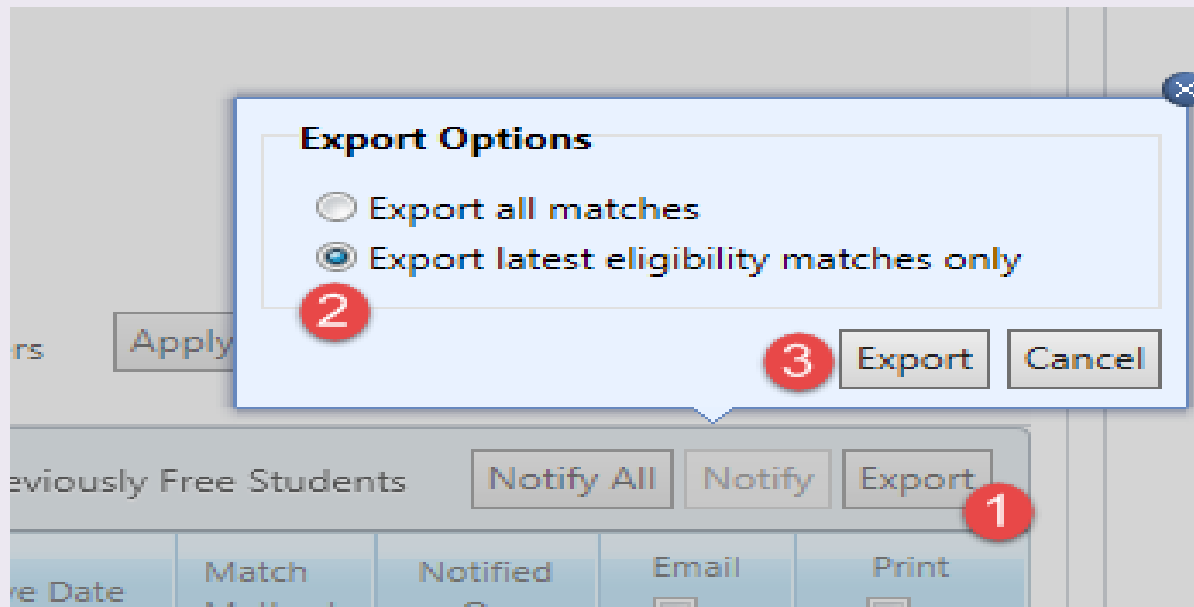


The screenshot shows a web interface for 'Matched Students'. At the top, there are two checkboxes: 'Exclude Previously Notified Students' and 'Exclude Previously Free Students'. To the right are three buttons: 'Notify All', 'Notify', and 'Export'. The 'Export' button is highlighted with a red rectangular box. Below the buttons is a table with the following columns: ID, Last Name, First Name, Site, Grade, File Date, Match Date, Effective Date, Match Method, Notified On, Email, and Print. The table contains 10 rows of data. The first two columns (ID and Last Name) are obscured by a greyed-out area. The 'Print' column contains icons for printing and exporting to Excel.

ID	Last Name	First Name	Site	Grade	File Date	Match Date	Effective Date	Match Method	Notified On	Email	Print
			001	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017		 
			001	11	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017		 
			001	11	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017		 
			001	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017		 
			003	08	7/6/2016	7/6/2016	7/6/2016	System	1/27/2017		 
			001	12	8/5/2016	8/5/2016	8/5/2016	System	1/27/2017		 
			001	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017		 
			001	10	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017		 
			001	11	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017		 
			099	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017		 

# Obtaining the Direct Certification List: Exporting

- Export allows to save full list in Excel format



# New Match Notification Email

From: [IMATCH@state.sd.us](mailto:IMATCH@state.sd.us) <[IMATCH@state.sd.us](mailto:IMATCH@state.sd.us)>  
Sent: Friday, January 20, 2017 2:03 PM  
To: [REDACTED]  
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!

Student Eligibility → Administration → DC Matching → Matched tab

DC Matching

Potential Matches | Sibling Search | **Matched** | File Search

Academic Year  
[REDACTED]

Site Code: -- All -- | Site: -- All --

SSN / Student ID: [REDACTED] | Last Name: [REDACTED] | First Name: [REDACTED] | Grade: --All-- | Status: Active

Case Number: [REDACTED] | Match Date From: [REDACTED] | Match Date To: [REDACTED] | Match Method:  System  Sibling  Manual  Transfers

**Apply** | Reset

Add a one-day buffer in the 'From' date range

# Direct Certification List: Daily Change Using Date Range

Student Eligibility → Administration → Matching

**DC Matching**

Potential Matches | Sibling Search | **Matched** | File Search

Academic Year: 2017 - 2018

Site Code: -- All -- | Site: -- All --

SSN / Student ID: | Last Name: | First Name: | Grade: --All-- | Status: Active

Case Number: | Match Date From: 1 | Match Date To: 2 | Match Method:  System  Sibling  Manual  Transfers 3 | Apply | Reset

**Matched Students**  Exclude Previously Notified Students  Exclude Previously Free Students

ID	Last Name	First Name	Site	Grade	File Date	Match Date	Effective Date	Match Method	Notified On	Email	Print
----	-----------	------------	------	-------	-----------	------------	----------------	--------------	-------------	-------	-------

# Direct Certification by Site

Student Eligibility → Administration → DC Matching → Matched tab

The screenshot displays the 'DC Matching' interface. On the left, a sidebar menu includes 'Student Eligibility' (highlighted with a red box), 'Administration' (highlighted with a red box), and 'DC Matching' (highlighted with a red box). The main area is titled 'DC Matching' and features tabs for 'Potential Matches', 'Sibling Search', 'Matched' (highlighted with a red box), and 'File Search'. Below the tabs, there are search filters: 'Academic Year', 'Site Code' (dropdown), and 'Site' (dropdown, highlighted with a blue box and a blue arrow pointing left with the text 'Select a specific site'). Below these are input fields for 'SSN / Student ID', 'Last Name', 'First Name', 'Grade' (dropdown), and 'Status' (dropdown). At the bottom, there are fields for 'Case Number', 'Match Date From', and 'Match Date To', along with a 'Match Method' section containing checkboxes for 'System', 'Sibling', 'Manual', and 'Transfers'. The 'Apply' button is highlighted with a red box, and a 'Reset' button is also visible.

# Direct Certification by Site

Student Eligibility System

Applications  
Administration  
Patrons  
Application Reports  
Eligibility Reports  
Eligibility Roster  
DC Sibling  
Configuration

### Eligibility Roster

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

As of Date: 1/31/2018

**Eligibility**

- Free
- Reduced
- Paid

**Options**

- Display Eligibility Code
- Display Contact Info
- Sort by Grade
- Only Verification Sites

**Include**

- Inactive Students
- Inactive Sites

**Reason**

- Uncheck All
- Categorical
- CEP Transfer
- DC FDPPIR
- DC Foster
- DC Medicaid
- DC SNAP
- DC TANF
- DC Unmatched
- Default
- Denied
- Even Start
- Foster
- Grace Period
- Head Start
- Homeless
- Import
- Income
- Migrant
- Pre-Approval
- Principal Approved
- RCCI
- Refused Benefits
- Removed
- Runaway
- Transfer
- Verification

- Student Eligibility
- Eligibility Reports
  - Eligibility (uncheck Paid, Reduced)
  - Reason (uncheck DC Unmatched, Default)

Generate Report

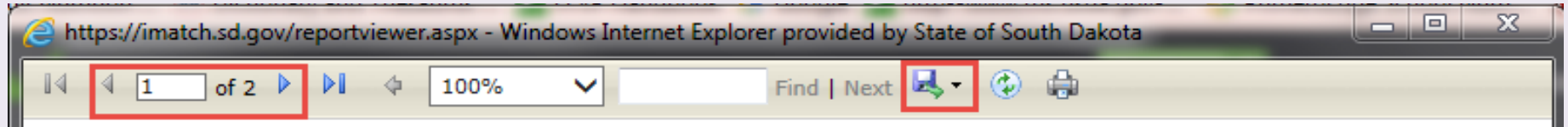


# Direct Certification by Site

The screenshot displays the 'Student Eligibility System' interface. On the left is a navigation menu with items: Applications, Administration, Patrons, Application Reports, Eligibility Reports (highlighted with a red box), Eligibility Roster (highlighted with a red box), DC Sibling, and Configuration. The main content area is titled 'Eligibility Roster' and contains several configuration sections:

- Site Code:** A dropdown menu set to '-- ALL --'. A blue box highlights the 'Site' label and the dropdown menu.
- Grade:** A dropdown menu set to '--ALL--'.
- As of Date:** A date input field set to '1/30/2018' with a calendar icon.
- Eligibility:** A section with three checkboxes:  Free,  Reduced (highlighted in yellow), and  Paid.
- Options:** A section with four checkboxes:  Display Eligibility Code,  Display Contact Info,  Sort by Grade, and  Only Verification Sites.
- Reason:** A section with a grid of checkboxes. The first row includes 'Uncheck All' (checked), 'Denied', and 'Pre-Approval'. The second row includes 'Categorical', 'Even Start', and 'Principal Approved'. The third row includes 'CEP Transfer', 'Foster', and 'RCCI'. The fourth row includes 'DC FDPIR', 'Grace Period', and 'Refused Benefits'. The fifth row includes 'DC Foster', 'Head Start', and 'Removed'. The sixth row includes 'DC Medicaid', 'Homeless', and 'Runaway'. The seventh row includes 'DC SNAP', 'Import', and 'Transfer'. The eighth row includes 'DC TANF', 'DC Unmatched' (highlighted in yellow), and 'Verification'. The ninth row includes 'Default' (highlighted in yellow) and 'Migrant'.

# Direct Certification by Site



- Arrows allow user to page through to additional students, or additional sites
- Floppy disk Save icon allows users to save file as Excel
  - Saving as Excel features each site to display as a different tab in Excel

# Potential Matches

- Student Eligibility
- DC Matching
- Potential Matches

The screenshot displays the 'DC Matching' section of a software application. On the left is a sidebar with navigation items: 'Student Eligibility' (highlighted with a red box), 'Administration' (highlighted with a red box), 'DC Matching' (highlighted with a red box), 'Grace Period Letters', 'Patrons', 'Students', 'Application Reports', and 'Direct Approval'. The main content area is titled 'DC Matching' and features a 'Potential Matches' tab (highlighted with a red box) along with 'Sibling Search', 'Matched', and 'File Search' options. Below the tabs are search filters: 'Student Details' (Last Name, First Name, ID, Birth Date), 'Probability' (High, Medium), and 'Compare Status' (Not Reviewed, Reviewed). There are 'Reset' and 'Apply' buttons. A section titled 'Potential Match Details' contains a table with two columns: 'PrimerEdge Student Details' and 'Certification File Details'. The table headers are Student ID, Last Name, First Name, Birth Date, ID on File, Last Name, First Name, Birth Date, and Probability. The table is currently empty, displaying 'No records to display.'



# Potential Matches Reviewing Entries

Potential Match Details i 1

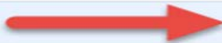
PrimerEdge Student Details				Certification File Details				
Student ID	Last Name	First Name	Birth Date	ID on File	Last Name	First Name	Birth Date	Probability

Compare... 3 More...

# Potential Matches

- Matching Criteria
  - Reviewing possible match
  - Making the Match

Matching Criteria	Student Details	File Details	Points
SSN			0
Student ID			0
Full Name			22
First and Last Name			0
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 ( $\pm 10$ day(s))			0
DOB Month Year Twist			0
Street Address			0
Guardian			6
Phone 1			0
Phone 2			0
County Code(s)	Brown	Brown	12
<b>Total - 40 (High)</b>			



# Sibling Match

- You can manually match siblings or other students that live in a household that were not automatically matched utilizing the Sibling Match
- Go to the *Sibling Search* tab, select the way in which you would like to create a sibling match, and then click ‘apply’
- There are two ways to do this, shown on the following slides:

# Sibling Match #1

- Select 'by household' (1) this should display a student(s) that has benefits on the left side (2) and a sibling in the same household without benefits on the right side (3)
- Select the checkbox (4) and click 'Process Matches' (5) – this will match the non-recipient to their household

# Sibling Match #1

Student Eligibility System

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

## DC Matching

Potential Matches Sibling Search Matched File Search

Method  
1  By Household  By Address  By Guardian  Manual

### Sibling Matches by Household

5

Matching Approval	Address	<input type="checkbox"/>	Student ID	Last Name	First Name	Site	Grade
2		4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Billy Jones, Bob Jones	<a href="#">View</a>	<input type="checkbox"/>		Jones	Sarah		11
	<a href="#">View</a>	<input type="checkbox"/>					10
	<a href="#">View</a>	<input type="checkbox"/>					08
	<a href="#">View</a>	<input type="checkbox"/>					09
	<a href="#">View</a>	<input type="checkbox"/>					09
	<a href="#">View</a>	<input type="checkbox"/>					12
	<a href="#">View</a>	<input type="checkbox"/>					05



# Sibling Match #2

- Select 'Manual' (1) you will be able to look-up for the approved, directly certified student (2) and then you will be able to do a separate look-up for the non-certified student (3)
- After selecting these students, click 'Process Matches' (4)

# Sibling Match #2

The screenshot displays the 'DC Matching' interface. On the left is a navigation menu with 'Student Eligibility' and 'DC Matching' highlighted. The main area is titled 'DC Matching' and contains tabs for 'Potential Matches', 'Sibling Search', 'Matched', and 'File Search'. The 'Sibling Search' tab is active. Below the tabs, there is a 'Method' section with radio buttons for 'By Household', 'By Address', 'By Guardian', and 'Manual' (which is selected). An 'Apply' button is next to the 'Manual' option. Below this is a 'Match Students' section with a 'Process Matches' button. A table with columns 'Approved Student ID', 'Sibling Student ID', 'Last Name', 'First Name', 'Site', and 'Grade' is shown. Two rows are visible, each with a blue selection box and a grey '...' button. A 'Process Matches' button is at the bottom right of the table. Red callout numbers 1 through 4 are placed over the 'Manual' radio button, the 'Approved Student ID' input field, the 'Sibling Student ID' input field, and the 'Process Matches' button respectively.

Student Eligibility System

Applications

Administration

Direct Approvals

DC Matching

Grace Period Letters

Patrons

Application Reports

Eligibility Reports

Configuration

DC Matching

Potential Matches Sibling Search Matched File Search

Method

By Household  By Address  By Guardian  Manual

Match Students

Approved Student ID	Sibling Student ID	Last Name	First Name	Site	Grade	
<input type="text"/>	<input type="text"/>					<input type="button" value="Process Matches"/>
<input type="text"/>	<input type="text"/>					<input type="button" value="Process Matches"/>

# FDPIR

- Reach out to your local FDPIR office to see if they will be willing to provide you a list of eligible students
- Provide them with a list of students that are enrolled in your district, not already directly certified in iMATCH
- They will provide you with students receiving FDPIR benefits

# FDPIR Lists

- The list **you** send to your FDPIR office must include:
  - one identifying information matching indicator such as their birthdate, address, or parents name
- The list the **FDPIR office** sends to you must include:
  - Start and End date of benefits
  - A written, signed, and dated statement (on letterhead) from an FDPIR official at the local office stating that the students on this list are receiving FDPIR benefits

# Migrant/Homeless

- The South Dakota Department of Education has Homeless and Migrant data for the current school year
- If you have students on either of these lists, you will not need to submit this data to us



# Helpful Hints

- If you can reach an ISP of 65-70% with only iMATCH, you do not need to take any further steps
  - You will have reached a claiming percentage of 100% free!
- If students are already certified in iMATCH, do not send them to the FDPIR office.
- The sooner, you begin working on this, the more assistance and support our office can provide

# Helpful Hints Part 2

- “Potential Matches” in the iMATCH system do not count toward your ISP, unless you manually match them
- Check the iMATCH system weekly for any new potential matches, to ensure the highest ISP
- Extend DC benefits to all members of a household
- If you have questions or need help do not be afraid to call!

**Questions?**



# CANS Contact Info.

- Mikayla Hardy
  - [Mikayla.Hardy@state.sd.us](mailto:Mikayla.Hardy@state.sd.us)
  - (605) 773-8067
- Andrea Hollin
  - [Andrea.Hollin@state.sd.us](mailto:Andrea.Hollin@state.sd.us)
  - (605) 773-5213

# PrimeroEdge Customer Support

- 1-866-442-6030
- [support@primeroedge.com](mailto:support@primeroedge.com)

# CEP Timeline and iMATCH Basics

This training credits for 60 minutes of training in

## Key Area 3 - Administration

3130 Community Eligibility Provision (CEP)

Your Name:

Date of Training:

