Direct Certification State Match System

FAQ

NEW YORK STATE EDUCATION DEPARTMENT, CHILD NUTRITION PRORAM

Contents

1. What is the State Match System?

The State Match Systems is a feature that has been added to the New York State Student Identification System (NYSSIS). The system provides users with access to direct certification (DC) data (e.g., SNAP and Medicaid lists) and to DC data that has been matched to New York State student records.

2. Is the State Match System a replacement for the DCMP through CNMS?

In part and over time the Direct Certification Matching Process (DCMP) through the Child Nutrition Management System (CNMS) will be phased-out with enhanced capabilities made available through the State Match System and related business applications. Like the CNMS process, the State Match System provides access to DC data, however, the State Match System provides this data pre-matched to student records/IDs for easy import into food services management systems.

3. When will the CNMS go away?

It is expected that the State Match system and the DCMP through CNMS will run in parallel for all of the 2017/2018 school year. Once we are certain the State Match System can meet the needs of users those DC features of the CNMS will be disabled. Other CNMS features such as reporting and claims will remain and be available through the CNMS until they can be replaced by other business applications.

4. Who can access the State Match System?

The State Match system is a Web application accessible to New York State Education Department (NYSED) School Food Authorities (SFAs) and their staff (e.g., Food Service Directors and Managers, Food Services Personnel, and related support staff).

5. Where do I go to access the State Match System?

The NYSSIS system and State Match capabilities are available on the NYSED Web site, at the NYSED Application Business Portal (https://portal.nysed.gov/abp).

6. How do I get Access to the State Match System?

To begin, you will need to request a user ID from your district's SEDDAS Delegated Administrator (DA). SEDDAS is the standard authentication system built by SED and used by school staff across the State. SEDDAS uses a process of allowing designated school district personnel, DAs, to create user IDs. Although your DA should be familiar with the delegated administration processes, if asked, you can tell them you need access to the NYSSIS application with the role of, "Child Nutrition User".

7. Who is my delegated administrator (DA)?

Every LEA across the State has a delegated administrator and it is typically your school's CEO. In public school districts, this Role (DA) can and must be designated to school CEO's by the superintendent (Super DA). In nonpublic schools and Charter schools, a SEDDAS account is automatically created based on the Principal/CEO that has been recorded in SEDREF via an overnight process.

8. My CEO isn't familiar with SEDDAS and delegated administration, what do I do now?

An email was sent automatically to your school CEO once their DA account was created. Oftentimes since the email is computer generated it can get caught in the spam folder, so it is important your CEO look there first and set the SEDDAS donotreply@nysed.gov email as a safe email address. For users that know their user name but forgot their password they can follow the instructions that are found here: http://www.p12.nysed.gov/seddas/seddas-password-reset.pdf. If your CEO does not know their username or needs any other assistance with using SEDDAS, your CEO should contact NYSED at seddas@nysed.gov. For more information on using SEDDAS there is also a user guide available here: http://www.p12.nysed.gov/seddas/completeuserguide.pdf as well as an abbreviated Quick Start guide here: http://www.p12.nysed.gov/seddas/guides/how-to-grant-access-nyssis-state-match-system.pdf.

9. How do I Login and get Started?

Once you receive your credentials you will go to the NYSED Application Business and login using the username and password your DA provided. The State-level match application is new functionality added to the existing New York State Student Identification System (NYSSIS) Web application. Only after you login will you see the NYSSIS link under 'My Applications' which you will select to begin using the State Match system.

10. What are the main features of the State Match System?

Search, State Match and Roster Upload are the main features of the State Match System:

- **Search** provides access to direct certification data and will often be used to find students that are believed to be directly certified but for whatever reason are not found on the State Match screen (e.g., students without NYSSIS IDs).
- **State Matches** is available off the State Matches Select menu and provides student records from the NYSED NYSSIS system that have been found on direct certification (DC) lists. The matching process appends a school ID, local student ID, and a NYSSIS ID to DC records for easy import into food service management systems.
- The **Bulk Search** feature behaves much like the Search. One key difference is that rather than search for matches one at a time, the feature allows one to upload a roster of students and have the system search for matching DC records.

11. How does the matching process work?

The matching engine can be thought of as a toolbox. Tools in the toolbox are used to help discover matches between direct certification records and student records in NYSSIS (records maintained by LEAs and housed at NYSED). For example, there are tools called 'soundex', 'edit distance', and 'longest common substring' that can eliminate typos, misspellings, and other differences between records to help identify matches.

12. What does the probability column mean?

The matching engine does not say that two records are absolutely a match or two records are absolutely not a match, it simply calculates the probability of two records being a match. Generally speaking, scores in the 90% range are always identical matches but even scores in the below 50% range will often be matches. Lower probability scores simply mean someone should compare the matches manually before directly certifying. As you inspect matches over time you'll start to get a feel for probability scores and those scores that require validation.

13. What does the "DC Eligibility Date column mean?

This column represents the first DC file that the child appeared on for the current school year. SFA's may go back to the first day of that month as the student's eligibility date.

14. What does the "School Record Found On" date mean?

This is the date that the DC record and the NYSED record were connected. This column will allow you to sort so that you can display your SFA's most current matches each time you download your State Matches.

15. I can view my State Matches; how do I get them into my food service management system or Student Information System?

The State Match screen allows one to download in an Excel format. After downloading, how you then import into your local system will vary. In almost all cases you will want to use either the Local ID or NYSSIS ID in the downloaded table to join with tables in your local system. This circumvents the need to match the students first and last name and date of birth to your local student roster, which is error prone. The State Match system has already matched DC data to student records, you now simply need to import these into your local system using the student's unique ID.

16. Why am I not seeing children in my State Matches I believe are directly certified? There are many reasons why a child may not show up in your State Matches. The most common are due to what are called, "hidden" records. These hidden records exist for several reasons:
    1. A student has recently transferred into your school and this new enrollment information has not been updated in NYSSIS. Until this information is transmitted to NYSED the student will be assigned to their former school and will only be displayed in that school. Users only have access to Recipient Agencies (RAs) under their SFA within the 'State Match' feature. The student may still be found through the 'Search' or 'Bulk Upload' feature.
    2. The student does not have a NYSSIS ID. For public schools, all students must have a NYSSIS ID. However, for nonpublic schools that choose not to participate in NYSSIS, a NYSSIS ID may never be created for a student and in-turn SED will not have a student record to use for matching in the SFAs state match. The student may still be matched to a SNAP or Medicaid record through the 'Search' or 'Bulk Upload' feature.
    3. The State Match system was not able to find a match between a DC and NYSSIS record. There are two common reasons why this might occur.
        • The first would be poor data quality, that is records in the direct certification file have severe errors that make it impossible to find a matching NYSSIS record.
        • The second is that the record, although it may exist on a DC list, has not been processed yet. Because the matching process takes place over days or sometimes weeks, SED can make DC records available for searching while in the background they are being matched to NYSSIS records (you will note at the top of the search screen in pink the latest match processing statistics).

17. If my school does not update NYSSIS until the data warehouse opens in September/October, how will that affect DCMP and processing of State Matches? The State Match System looks for NYSSIS records from both the current school year and the most recently updated school year which in most cases will be the previous school year. So even if your school has yet to update NYSSIS for the current school year you should see the majority of your matches. One exception would be for newly enrolled students, such as those in kindergarten or pre-kindergarten, as they may not receive their NYSSIS ID until the start of the current school year.

18. The student ID in my State Match list has leading zeros, can I remove these so it matches the student ID in my local system? Yes, some systems will add leading or trailing zeros to conform to established formats. To match IDs between the State Match and your local system it is OK to format however is necessary.

19. BEDS require us to maintain the original match date in our POS system. However, if we perform roster upload or download State matches this date will get updated to the latest match date. How should we handle this? Once you have the data locally, you will need to determine how best to import into your POS or other local system including any rules your system should follow (e.g., maintain the original match date, only import new matches, etc.). Many systems have to be programmed to meet these needs.

20. I downloaded a match list and there are several students who have graduated, why is that? The SNAP and Medicaid data is run through the New York State Student Identification System (NYSSIS), using student enrollment data to find probable matches. NYSSIS maintains student data past the typical graduation age because it is necessary for other NYSED offices, including the Higher Education Office, to track student progress after graduation. Therefore, the direct certification data could be matched to a record for a student who is no longer enrolled in your District or school. If you believe that there are errors in enrollment data, you will need to notify your contracted Level 1 host.

21. What should I do if I cannot find a child in my State Matches?

To start, you can use the Search feature to find students using First Name, Last Name, Date of Birth, Case Number, or ZIP code. The Search Tips will provide you with guidance on the field combinations to conduct a search. The more fields used, the better chance that Search will find the record you are looking for.

22. What is the color coding I see in the Search results?

When results are returned they will have two components. To the right in grey are columns from the direct certification list (e.g., student name, DOB, etc.). Color coded columns to the left are from the NYSSIS system and indicate the match status or, 'Type':

= Red means the record has yet to be run against NYSSIS so a match to a NYSSIS record still could be found. Still was found on a DC file so student is directly certified.

= Yellow means the record was run against NYSSIS but no match to a NYSSIS record was found. Still was found on a DC file so student is directly certified

= Green means the record has already been matched to a student record in the NYSSIS system.

Search results include DC records that closely match your search criteria. If you can identify a record as a student currently enrolled in you school then that child should be directly certified and regardless of the color code that is attached to the record. The color code or "Type" column is included so you can see the status of the returned record in the matching process; and if already matched, provide you with more information on the student.

23. What is the Bulk Search feature?

The Bulk Search feature behaves much like the Search feature. One key difference is that rather than search for matches one at a time, the feature allows one to upload a roster of students and have the system search for matching DC records. You can think of Bulk Search as a batch version of Search. Although anyone can use Bulk Search it is particularly useful for nonpublic schools that have chosen to not participate in NYSSIS. Simply stated, if NYSED does not have a record of a student it has nothing to match a DC record to. Bulk Search works around this problem, and the alternative of searching for DC records one-by-one, by allowing users to upload their student records for search.

24. In my Bulk Search results, what is the difference between the "All Records" and "Side-by-Side Candidates"? The "All Records" gives you two sets of records. The gray records are those that came from the roster/file that you uploaded. If the system was able to find matches for any of those records it will display them as 'Candidates' beneath. If the system could not find any matches, you will simply see the uploaded record with no candidates beneath. From here you can search and browse records as well as copy or download. The "Side-by-Side Candidates" view displays only the *potential* matches from the file you uploaded and will look identical to the State Level Match feature.

25. Can I see a history of my work? Yes, as you continue to use the State Match system it will keep track of your use. By clicking on the 'My Activity' link in the left border you will see a listing of actions you have performed in the past. This might be useful to pick back-up where you last left off or to help in future searches.

26. When does the Direct Certification must be done by for the upcoming school year? All SFAs (except for Jails and Residential Child Care Institutions (RCCIs) with NO day students) are required to complete the online DCMP process a **minimum of three times a year within the following timeframes: as close to the beginning of the school year as possible**; by or near **November 30** and by or near **February 28**. The system will process DC data monthly; therefore, SFA's are encouraged as a best practice for DCMP to access the data more frequently to ensure SFAs are maximizing federal reimbursement.

27. Do we need to do an upload at the beginning of each school year? Is an upload even necessary?

To retrieve your matches you do not need to upload anything. If your students have NYSSIS IDs then the system has already matched those students to records from the direct certification lists that NYSED receives from DOH (Medicaid) and OTDA (SNAP). Bulk Search is strictly for searching SNAP and Medicaid lists directly. Think of it as a way to submit a bunch of searches all at once. Bulk Search will most often be used by non-public schools or for searching for students that you believe to be eligible, but for whatever reason are not showing up in your state matches (e.g., recently enrolled students).

28. Do I need NYSSIS ID's for my students?

New York State Student Identification System (NYSSIS) ID numbers are **not required** to attempt a Direct Certification Matching Process (DCMP) match. Access to the NYSSIS online system application is required, because that is where Medicaid and SNAP files are stored.

The NYSSIS ID itself is only one of many data elements (like first name, last name, guardian, address, etc.) that may be used to compare across records. If a student has never participated in the NYS Testing/Data Warehouse system, then they will never have had a NYSSIS ID, so one wouldn't be available for use in a comparison. Many students who are eligible for Child Nutrition programs have never been in the NYS Testing system, so a NYSSIS ID is **NOT** a requirement.

The School Food Authority (SFA) has the option to upload a roster of its students, which will provide the SFA with possible match results. When a roster is uploaded, the data submitted for each student is compared to ALL available SNAP and Medicaid records. If a potential match is found, it is displayed. The SNAP and Medicaid data includes children ages 3-21. Therefore, if you include those children on your roster, the DCMP system will "look" through the SNAP and Medicaid data to see if there is a match.

29. Should I upload the same roster in 'bulk search' if I don't think the system is matching all of my students?

No. SFAs utilizing the 'Bulk Search' feature should NOT upload multiple rosters of the same children as this will slow down matching for DCMP. When new SNAP and Medicaid files are processed, the rosters will "run" against these new files and any new potential matches will be displayed; therefore, SFAs can continually check the original roster uploaded for potential matches. Only upload additional rosters if your SFA needs to search matches for new students that were not included on the first roster. If your SFA has a small number of children, you can also conduct an individual search.