



Public Schools of North Carolina

Unique Identifier for Staff (UID Staff)

Training for LEAs that Use Sartox

Agenda

UID Staff

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 - UID Staff Process
 - Best Practices
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UID Staff Overview

- The Unique Identifier for Staff System (UID Staff) will assign a unique identifier to Staff who participate in the North Carolina public school system.
- Unique IDs follow staff between school districts and remain valid even if they move out of state and then return to a NC public school.
- Assigning unique identifiers is the first step in DPI's multi-stage effort to create the NC Common Education Data Analysis and Reporting System (CEDARS).
- UID Staff is built on the eScholar Uniq-ID® for Staff product.



UID Staff – Key Terms

Match Probability

- The newly submitted staff record is compared against all existing staff records to determine the probability that two staff records are the same individual.

A numerical value (1 to 100) is assigned by UID Staff to represent the matching probability of a pair of staff records.

➤ 1-87 = No Match

If the system finds no matching staff record, it will create a new Staff ID.

➤ 88-93 = Near Match

If the system encounters a Near Match, multiple Matches, or any combination of both, it will mark the record as 'Resolve Near Matches'.

These records need to be reviewed and resolved by District users.

➤ 94-100 = Match

If the system finds an exact matching staff record, it will assign a new Staff ID.



Fields Used by the UID Matching Engine

Match Rules for Staff ID

| Field | Weight |
|---|---|
| First Name | High |
| Middle Name | High |
| Last Name (Includes suffix if specified) | High |
| Date of Birth | Medium |
| Gender | Low |
| Social Security Number | Medium |
| Ethnicity Code | Low |
| Previous Last Name | High if initial match is not found on last name; Not Evaluated if initial match is found on last name. |



Exact Match Rule

Exact Match Rules for Staff ID

- A new staff record loaded into UID Staff will be considered an exact match if the following data is the same:
 - Staff ID
 - Last Name
 - First Name
 - Date of Birth
- Importing the staff IDs into the payroll source system will result in more exact matches and few near matches.

Batch

- A single staff record or group of staff records submitted together for the purpose of assigning new identifiers or updating pre-existing identifiers.




Accessing UID Staff


- UID Staff uses role-based security.
 - The system will determine what system features are available for each user role.
- LEA users will be assigned to the “District” User Role. District Users can upload and validate staff files, resolve pending near matches, assign IDs, and download files.
- Registration information can be found at:
<http://www.ncpublicschools.org/cedars/uniqueid/staff/registration/>
- UID Staff will be accessed through the following websites:
 - Training
 - <https://cedarstrain.schools.nc.gov/staffid/customerLogin.jsp>
 - Production
 - <https://cedars.ncpublicschools.gov/staffid/customerLogin.jsp>




UID Staff Home Page

- The Home Page will be displayed after a successful login.
- The Home Page consists of a side menu bar and 4 different sections that allow you to quickly access various information.


My Batches Currently Processing 


| Batch Number | Date Uploaded | Batch Status | |
|---------------------|---------------|---------------------|---|
| 159 | 05/15/2009 | DATA ERRORS PENDING |  |

[Show me all my batches](#)


Find A Batch 


If you are in the UID Training environment, you will see "TRAINING SITE" in the upper right corner in purple.

Batches Pending - Fix Errors 

| Batch Number | Date Uploaded | Batch Status | |
|---------------------|---------------|---------------------|---|
| 159 | 05/15/2009 | DATA ERRORS PENDING |  |

[Show me all batches pending with errors](#)

Batches Pending - Near Matches 

| Batch Number | Date Uploaded | Batch Status | |
|--------------------|---------------|----------------------|---|
| 84 | 05/04/2009 | NEAR MATCHES PENDING |  |

[Show me all batches pending match resolution](#)

Navigating UID Staff – Menu






- The left hand side of each screen will contain a menu bar that allows access to the various UID Staff system components.



Navigating UID Staff

- UID Staff utilizes several graphical buttons for navigation purposes.

| | |
|---|---|
|  | Clicking this image starts a process based upon status / next step. |
|  | Clicking this image allows the user to view the details of the process. |
|  | Clicking this image starts a download of an application related file. |

- The UID Staff system contains many pages that display lists of items. All lists may not show all rows on one page. To navigate to other pages in a list, use the **FIRST**, **PREV**, **NEXT**, and **LAST** buttons on the bottom of each page.
- Most lists in the UID Staff system can be sorted by their columns by clicking on the column's header.



Navigating UID Staff - Find A Batch


- To find a batch, enter a Batch Id in the **Find a Batch** field and click the **FIND** button.

Find A Batch

- If a matching batch is found, that batch will be listed in the Batch List.

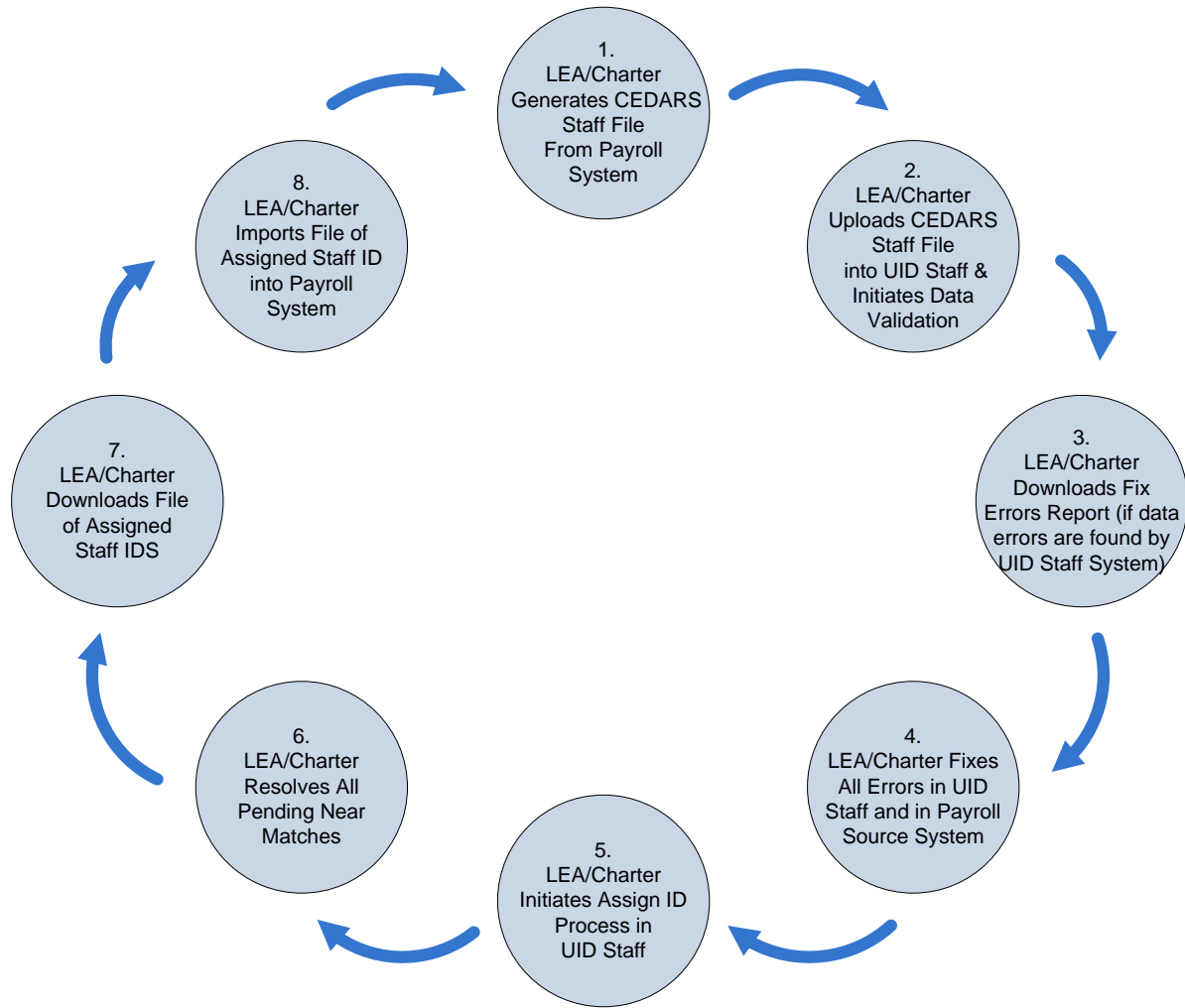
26

Find a Batch

| Batch Number | Upload Date | Batch Status | Number Of Records | |
|--------------------|-------------|---------------------|-------------------|--|
| 26 | 08/06/2008 | DATA ERRORS PENDING | 5 |  |

- To work on a particular batch, click the  icon in the right-most column.

UID Staff Monthly Process



UID Staff Monthly Process Overview

1. LEA/Charter generates the CEDARS Staff File from their payroll system.
2. LEA/Charter logs in to UID Staff and uploads the CEDARS Staff file generated from their payroll system (UID Staff Monthly Process Step 1) through a web browser. UID Staff assigns a batch number to the CEDARS Staff file and validates the data in the file that was uploaded successfully.
3. If data errors are found, LEA/Charter downloads the Errors To Fix report.
4. If data errors are found, LEA/Charter fixes all data errors in both their payroll system (using the Errors to Fix report) and in UID Staff.
5. After all data errors have been fixed in UID Staff, the LEA/Charter initiates the Assign ID Process in UID Staff. The UID Staff application will process the staff file and assign IDs through the UID Matching Engine.
6. LEA/Charter resolves all pending Near Matches.
7. After all near matches have been resolved, the LEA/Charter downloads the file of Assigned Staff IDs from UID Staff.
8. The LEAs/Charter imports the file of Assigned Staff IDs into their payroll system.



Monthly Process Step 1 – Generate CEDARS Staff File

- LEA generates the CEDARS Staff file from their payroll source system.
- To create the CEDARS staff file and copy it to a PC, perform the following steps:
 - Go to *Payroll Main Menu*
 - Go to *Option #36 Import/Export Menu*



Monthly Process Step 1 – Generate CEDARS Staff File

Go to *Option #46 Export CEDARS File*. The *Export CEDARS File* screen is displayed.

Session A - [24 x 80]

File Edit View Communication Actions Window Help

SunPac Financials PR Import/Export Menu Rev 6.08 FY:0 ADM:370
10/09/09

| | | |
|-----------------------|------------------------|-------------------------|
| 1 Make PRU 401k File | 20 HRMS Import (2002) | 39 Make Empl PC File |
| 2 Make PRU 457b File | 21 HRMS Export (2002) | 40 Misc Ded Export |
| 3 ING Benefit Export | 22 Wellington Import | 41 Annual Leave Export |
| 4 GAP Benefit Export | 23 Wellington Export | 42 Export 125 Ded Plan |
| 5 CPI Benefit Export | 24 Healthcare Bal Rpt | 43 VEC Quarterly Export |
| 6 PlanWithEase Export | 25 Hershey Co. Export | |
| | 26 Pierce Group Import | 45 Import CEDARS File |
| | 27 Pierce Group Export | 46 Export CEDARS File |
| | 28 Mark III Import | |
| | 29 Mark III Export | |

Select Function: _____
F3=Exit F6=NCEP F7=About F8=Messages F10=CmdEntry F18=Printouts

MR a MW

1902 - Session successfully started

Canon IP1700 on Ne02:



Monthly Process Step 1 – Generate CEDARS Staff File

- Fill in the parameters on the *Export CEDARS File* screen.
- **Enter Fiscal Pay Period to Process.....01** (or appropriate pay period)
- **Move Export File To PC Now (Y/N)?.....Y**
- **Enter Destination For Exported PC File...C:\SFFIN**

- Run the export. The UID Staff file, named UIDStaffYYPP.txt, where YY=fiscal year and PP=fiscal pay period, is copied to the C:\SFFIN directory on the PC that initiated the export.

- The file will contain current employees and former employees that have been paid within the last 12 months. The only employees that are excluded are substitutes. If the substitutes serves in another role (bus driver, coach, etc.), then they will be included in the file.



Monthly Process Step 2 – Upload CEDARS Staff File



- Log in to the UID Staff Training Site
- Click the **Upload File link** from the Menu.
- This module will allow LEAs to upload their CEDARS Staff Files.



Monthly Process Step 2 – Upload CEDARS Staff File

- To upload a file, perform the following steps:
 1. Click on the **Upload File** link on the Menu.
 2. The system will display the **Upload Batch** page.

Upload Batch ?!

* Template : eScholar Uniq-ID for Staff 2.0 Template ?!

* Field Delimiter : FIXED

Field Qualifier :

Ignore First Row : Yes No

* File : Browse...

Upload

3. Fill in the options as they are displayed on this screen shot then click the **Upload** Button.

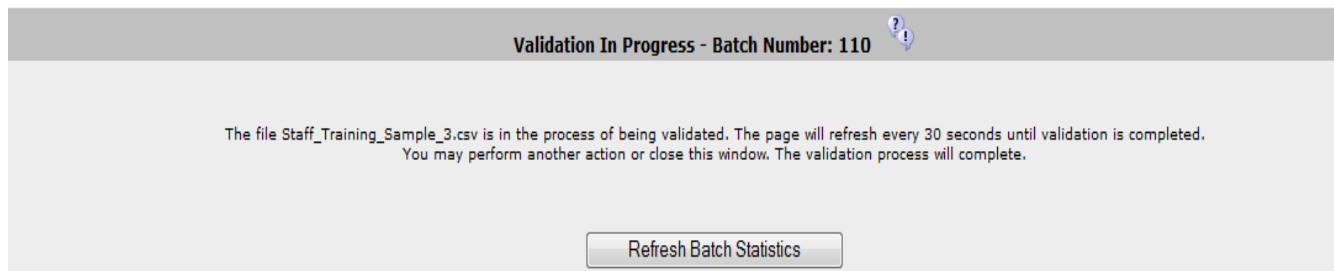


Monthly Process Step 2 (cont'd) – Upload CEDARS Staff File

4. If the file successfully uploads, the system will display the following screen:



- If the file cannot be uploaded, an error message will be displayed indicating that the file is not valid.
5. After a file is uploaded successfully, the data within the file will be validated. Some examples of data validation include making sure each record has the correct number of fields, a date of birth, a gender, etc.
 6. To start the Validation Process, click the Validate button or wait and the system will begin the Validation automatically.
 7. A **Validation in Progress** screen will be displayed. Users can click the **Refresh Batch Statistics** button or wait 30 seconds to view the validation progress.



Monthly Process Step 2 - Validate Staff Data (cont'd)

3 Possible Validation Outcomes

After data validation is complete, the system will identify if any errors exist:

1. Fatal File Errors:

- The file contained one or more *fatal file errors* and could not be processed.

2. Invalid Data Errors:

- The file contained one or more *data errors*.

3. No Data Errors:


- The file contained no data errors and the user can start ID assignment.



Monthly Process Step 2 - Validate Staff Data (cont'd)

Fatal File Errors:

- The file will be rejected if a fatal error is found. Causes of a fatal errors include:
 - One or more fields have been omitted from a record.
 - The maximum allowable number of data errors has been exceeded.
 - One of the Upload options was not selected
- If the system finds a fatal file error, it will display the following screen:

Validation Failed - Batch Number: 24 

The file submitted 1_CreateStaff.txt has failed validation. File contained 10 fatal errors. File contained 0 data errors.

| Fatal Errors | | |
|------------------------------|------------------|-------------------------------|
| Error Description | Number of Errors | Line Number(s) |
| Incorrect number of columns. | 10 | 1, 10, 2, 3, 4, 5, 6, 7, 8, 9 |
| Total Fatal Errors | 10 | |

| Data Errors | | |
|-------------------|------------------|----------------|
| Error Description | Number of Errors | Line Number(s) |
| Total Data Errors | 0 | |

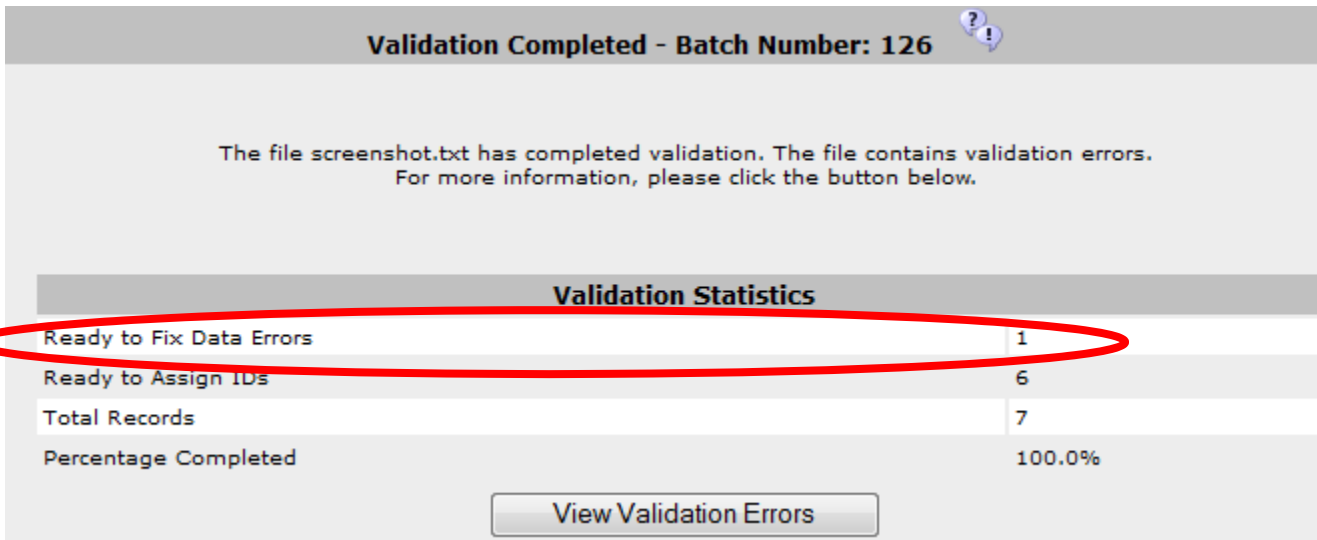
If the file contains a fatal error, then the batch will not be loaded into the UID Staff system.



Monthly Process Step 2 - Validate Staff Data (cont'd)

Invalid Data Errors:

- If data errors exist, the number of errors will be displayed. Select the **View Validation Errors** button for more information.



The screenshot shows a validation completion message for batch number 126. The message states that the file 'screenshot.txt' has completed validation and contains errors. Below the message is a table titled 'Validation Statistics' with the following data:

| Validation Statistics | |
|--------------------------|--------|
| Ready to Fix Data Errors | 1 |
| Ready to Assign IDs | 6 |
| Total Records | 7 |
| Percentage Completed | 100.0% |

At the bottom of the screenshot is a button labeled 'View Validation Errors'.

Note: The Training site will only allow users to view errors not fix them. The errors should be fixed in Sartox. After the errors are fixed in Sartox, users will need to complete Step 1 again then upload to the Production site.



Monthly Process Step 2 - Validate Staff Data (cont'd)

No Data Errors:

- If no data errors are found, the following screen will be displayed and the user can then upload the UIDSTAFFYYP.txt file into the Production site.

Validation Completed - Batch Number: 147

The file Staff_with_no_errors.csv has completed validation. Click the button to Start ID Assignment

| Validation Statistics | |
|-----------------------|--------|
| Ready to Assign IDs | 3 |
| Total Records | 3 |
| Percentage Completed | 100.0% |

Start ID Assignment

Note: The Training site will not allow you to start the ID Assignment process. You should now load your file into the Production site.



Monthly Process Step 3 – Download Error Report

To create an “Errors to Fix” report of records that need to be corrected in your payroll system, perform the following steps:


1. Select the **Download** link from the Main Menu.
2. The system will display 3 different tabs that provide access to download files. Select the **Other Downloads** tab.

Welcome, MFLANAGAN4147 [Sign Out]


[Download IDs By Batch](#) [Download IDs By Location](#) [Other Downloads](#)

Submission Type Extract Type From To

All **Errors To Fix**

| Batch Number | Upload Date | Batch Status | Number Of Records | |
|------------------------------|-----------------------------|------------------------------|-----------------------------------|---|
| 397 | 05/25/2009 | DATA ERRORS PENDING | 3 |  |

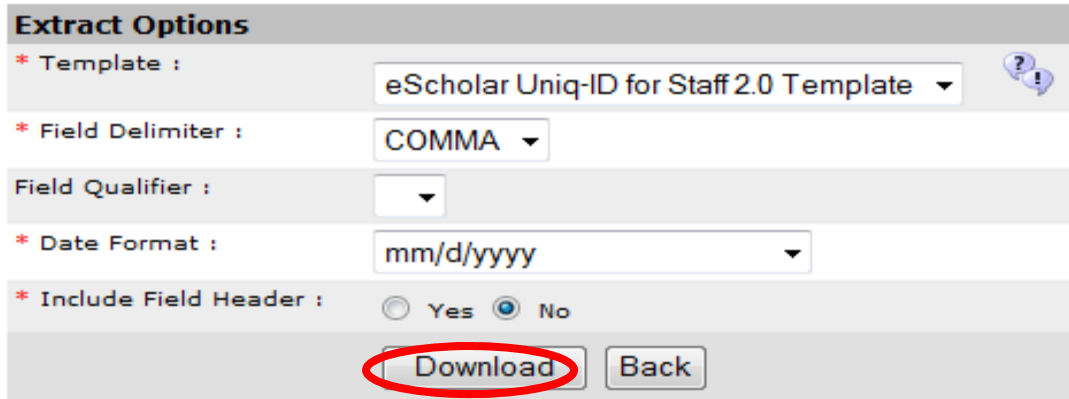
Displaying 1 to 1 of 1

3. Select “Errors to Fix” as the Extract Type.
4. Click the Download icon  in the far right column.
5. The system will display an **Extract Options** screen where details of the extract can be specified.



Monthly Process Step 3 – Download Error Report (cont'd)

6. Complete the *Extract Options Page* as necessary.



Extract Options

* Template : eScholar Uniq-ID for Staff 2.0 Template

* Field Delimiter : COMMA

Field Qualifier :

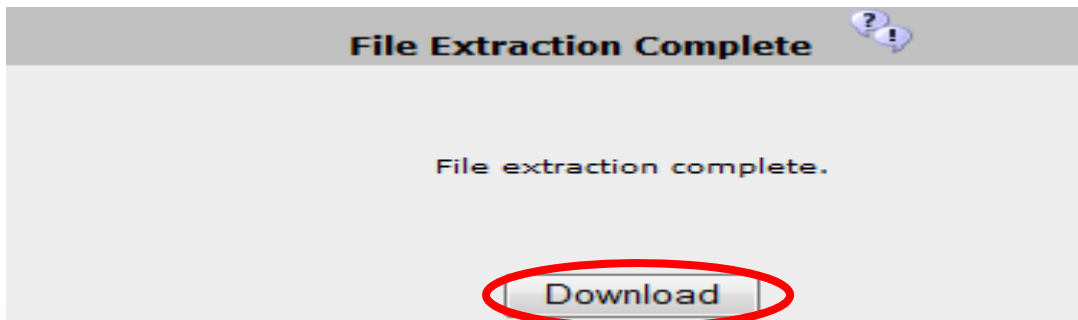
* Date Format : mm/d/yyyy

* Include Field Header : Yes No

Download **Back**

Note: Always select '**eScholar Uniq-ID for Staff 2.0**' in the Template field.

7. Click the **Download** button to extract the error file.
8. You will then see a File Extraction Complete message. Click the Download button to download the file.



File Extraction Complete

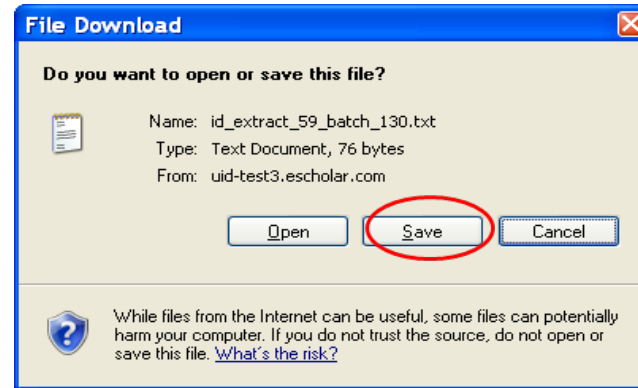
File extraction complete.

Download



Monthly Process Step 3 – Download Error Report (cont'd)

8. You will be given the option to Open, Save, or Cancel. You will want to Save this file. The location where you Save the file does not matter.



9. The “Errors to Fix” file will show the staff member’s name toward the left of the file and the data error will be displayed to the far right.

```
File Edit Format View Help
,304,681,Mitchel,James,,M/5/1970,3423444,999999999,N,,,,,,,,,,,,,A,,1398051,Ready to Fix Data Errors,invalid Ethnic code.(w);
,304,681,Bakula,Scott,,,,7/31/1969,34242,999999999,N,WH,,,,,,,,,,,,,A,,1398052,Ready to Fix Data Errors,Invalid Gender.(m);
,304,681,Piper,Peter,,,,7/5/1990,42342,999999999,N,BL,,,,,,,,,,,,,A,,1398053,Ready to Fix Data Errors,Gender is required.;
```


10. Correct the staff data errors in Sartox then complete Steps 1 and 2 again. On Step 2, users should load the new file into the Production Site.

Note: The text file can be imported into MS Excel and saved as a worksheet to enhance viewing of the data errors.



Monthly Process Step 4 - Fix Data Errors

If data errors still exist after loading into Production, the errors can be fixed by performing the following steps:

1. From the Home Page, click the details icon  for the batch with the **Data Errors Pending** status.
2. The system will display all records that have data errors:





| Select All In Page | | Cancel All Checked Records | Cancel All Error Records In This List |
|--|-------------------|----------------------------|---------------------------------------|
| Fix Errors - Batch: 169 | | | |
| District Code | School Code | Last Name | First Name |
| <input type="checkbox"/> 310 - Duplin County | 304 - Mock School | Appel | Ken |
| Displaying 1 to 1 of 1 | | | |
| | | First | Prev Next Last |

3. Click  to the right of the record you wish to fix.



Monthly Process Step 4 - Fix Data Errors (cont'd)

4. The system will display the staff information in a Fix Error Record form with an invalid message in red under each data issue.

| Fix Error Record  | |
|--|---|
| General Information | |
| * First Name: | <input type="text" value="George"/> |
| Middle Name: | <input type="text" value="L."/> |
| * Last Name: | <input type="text" value="Macon"/> |
| Suffix: | <input type="text"/> |
| Full Staff Name: | <input type="text"/> |
| Previous Last Name: | <input type="text"/> |
| Itinerant Teacher: | <input type="radio"/> Yes <input type="radio"/> No |
| Staff ID: | <input type="text"/> |
| Personal Information | |
| * Gender: | <input checked="" type="radio"/> Female <input type="radio"/> Male |
| * Date of Birth: | <input type="text" value="01"/> / <input type="text" value="22"/> / <input type="text" value="1980"/> |
| SSN: | <input type="text"/> |
| * Ethnic Code: | <input type="text" value=""/>  * Invalid Ethnic Code. (WHI) |
| Ethnicity Sub Group: | <input type="text" value="Not Applicable"/>  |
| Highest Degree Earned: | <input type="text" value="Not Applicable"/>  |
| Address 1: | <input type="text" value="2846 Wycliff Rd"/> |
| Address 2: | <input type="text"/> |

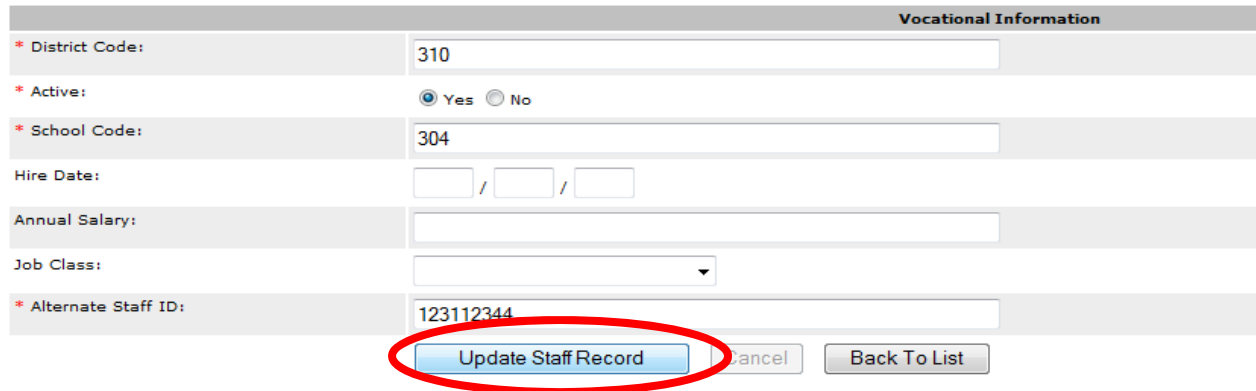
5. Correct all data errors on the page.



Monthly Process Step 4 - Fix Data Errors (cont'd)

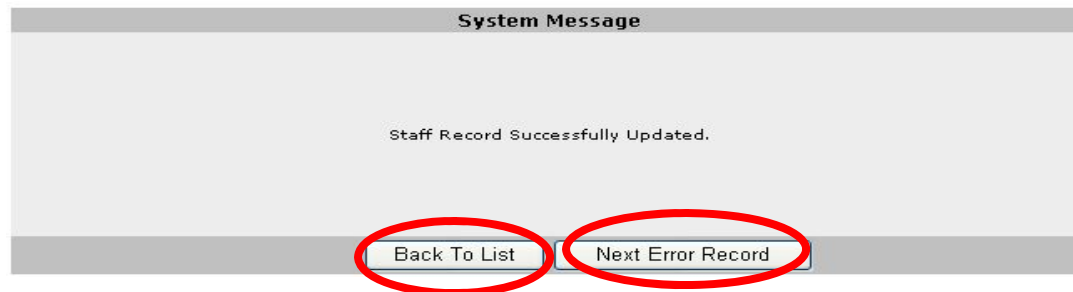
6. After all data errors are corrected, select the **Update Staff Record** button.

*If the Annual Salary field is 0, delete the 0 then click the Update Staff Record button.



The screenshot shows a web form titled "Vocational Information". The form contains several fields: "District Code" (310), "Active" (radio buttons for Yes and No, with Yes selected), "School Code" (304), "Hire Date" (empty date fields), "Annual Salary" (empty text field), "Job Class" (dropdown menu), and "Alternate Staff ID" (123112344). At the bottom of the form, there are three buttons: "Update Staff Record", "Cancel", and "Back To List". The "Update Staff Record" button is circled in red.

7. The system will display a confirmation message after the record is fixed:



The screenshot shows a "System Message" box with the text "Staff Record Successfully Updated." At the bottom of the box, there are two buttons: "Back To List" and "Next Error Record". Both buttons are circled in red.

8. Click **Back To List** to select the next record from the list of data errors or move to the next record in the list by clicking **Next Error Record**.



Monthly Process Step 5 - Staff ID Assignment

Once all data errors have been fixed, it is time to assign ID numbers:

1. Click the **Start ID Assignment** button.

Validation Completed - Batch Number: 128

The file 1_CreateStaff.txt has completed validation. Click the button to Start ID Assignment


| Validation Statistics | |
|-----------------------|--------|
| Ready to Assign IDs | 10 |
| Total Records | 10 |
| Percentage Completed | 100.0% |

Start ID Assignment



Monthly Process Step 5 - Staff ID Assignment (cont'd)

- The system will display an Assignment in Progress page.
 - Batch statistics are refreshed every 30 seconds or when the **REFRESH BATCH STATISTICS** button is selected.
- An Assignment Completed page will be displayed after the assignment process has completed.

Assignment Completed - Batch Number: 147 

The file submitted Staff_with_no_errors.csv has completed the ID assignment process. The file contained records for human review. Click the button below to view pending near matches.


| Assignment Statistics | |
|--|--------|
| New ID Assigned - No Matching Record Found | 2 |
| Ready to Resolve Near Matches/Duplicates | 1 |
| Total Records | 3 |
| Percentage Completed | 100.0% |

[View Pending Near Matches](#)



Monthly Process Step 6 - Resolve Near Matches

To resolve near matches, perform the following steps:

1. From the Home Page, click the  icon to the right of the batch with the **Near Matches Pending** status.
2. The system will display all near match records within the batch.

Resolve Near Matches - Batch: 157

| District Code | School Code | Last Name | First Name | |
|---|-----------------------------|---------------------------|----------------------------|---|
|  310 - Duplin County | 304 - Mock School | Connel | Jeff |  |
|  310 - Duplin County | 308 - Mock School | Gordon | Jeffrey |  |

isplaying 1 to 2 of 2

First Prev Next Last

3. Click the  icon to the right of the near match you want to review.



Monthly Process Step 6 - Resolve Near Matches (cont'd)

- The system will display a Resolve Near Matches Summary page which includes submission record and potential match record details.
 - The Submission record (top) is the record that was just loaded into the system.
 - The Potential Match record (bottom) is the record that is currently in the UID Staff System.

Resolve Match for Staff Member : 406044

Submission Record

| | | | |
|-------------------|---------------------------|---------------------------------|------------|
| First Name: Megan | Middle Name: B | Last Name: Phillips | Suffix: Jr |
| Gender: Female | Date Of Birth: 08/17/1990 | Ethnicity: White (Not Hispanic) | SSN: ##### |

Potential Match (Staff Id: 2533525669 - Probability: 88.0%)

| | | | |
|-------------------|---------------------------|---------------------------------|------------|
| First Name: Megan | Middle Name: | Last Name: Winchester | Suffix: |
| Gender: Female | Date Of Birth: 08/17/1990 | Ethnicity: White (Not Hispanic) | SSN: ##### |

- Select the Compare button to view additional details about the 2 records.



Monthly Process Step 6 - Resolve Near Matches (cont'd)

- Determine if the Submission record (left) is the same staff member as the Potential Match record (right).

| Near Match Details. | |
|-------------------------------|--|
| Submission Record: 406044 | Potential Match: 2533525669 (View Staff Profile) |
| General Information | |
| Staff ID: | 2533525669 |
| First Name: | Megan |
| Middle Name: | B |
| Last Name: | Phillips |
| Suffix: | Jr |
| Full Name: | |
| Previous Last Name: | Winchester |
| Personal Information | |
| Gender: | Female |
| Date Of Birth: | 08/17/1990 |
| SSN: | ##### |
| Ethnic Code: | White (Not Hispanic) |
| Ethnicity Subgroup: | White (Not Hispanic) |
| Highest Degree Earned: | |
| Address1: | |
| Address2: | |
| City: | |
| State: | |
| Zip Code: | |
| Vocational Information | |
| District Code: | 450 - Henderson County |
| School Code: | 301 - Apple Valley Middle |
| Job Class: | |
| Annual Salary: | |
| Hire Date: | |
| Alternate Staff ID: | 2 |
| Active: | Yes |

The fields highlighted in yellow indicate differences between the 2 records. The SSNs are still being compared even though they are masked by #s.



Monthly Process Step 6 - Resolve Near Matches (cont'd)

- To view more information about the Potential Match record, click the View Staff Profile Link

| Near Match Details. | | | |
|----------------------------|-----------------|----------------------------|--|
| Submission Record: 4101642 | | Potential Match: 721452625 | |
| General Information | | | |
| Staff ID: | 7214526255 | 7214526255 | |
| First Name: | STACEY | STACY | |
| Middle Name: | P | | |
| Last Name: | MOORE | MOORE | |
| Suffix: | | | |
| Full Name: | MOORE, STACEY P | MOORE, STACY | |

- A pop-up window will display more information about the record. The Vocational and Historical Information tabs will display previous employment information about the staff member which might be useful when conducting research.

The screenshot shows a web browser window titled "Staff Details - Windows Internet Explorer". The address bar displays the URL: <https://cedars.ncpublicschools.gov/staffid/staffDetailsPopup.do?staffid=5248216575&start=8&end=8&popup=true&tab=vocational>. The page has four tabs: "General Information", "Personal Information", "Vocational Information", and "History Information". The "Vocational Information" tab is selected, showing two employment records for a staff member. The first record is for "06B Crossnore Academy - 000 Crossnore Academy" with a job class, hire date of 11/22/2010, annual salary of \$\$\$\$\$\$, alternate staff ID of 33628, active status of Yes, and last update date of 12/17/2010. The second record is for "880 Transylvania County Schools - 880 Locally Assigned" with a job class, hire date of 08/22/2007, annual salary of \$\$\$\$\$\$, alternate staff ID of 3628, active status of No, and last update date of 06/29/2009. The browser status bar at the bottom shows "Done" and "Internet".



Monthly Process Step 6 - Resolve Near Matches (cont'd)

When reviewing near matches, the following actions can be taken:

1. Assign ID: If the Submission record is the same as the staff Potential Match record, “assign” the Staff ID of that matching staff member to the submitted staff member.
 - The Staff ID of the Potential Match record is added to the Submission record. The other information in the Submission record will update the Potential Match record and the previous Potential Match record information is stored in the staff history.
 - A new Staff ID is not created, since both the records were identified as belonging to the same staff.
2. Create New: If no staff matches the submission staff record, create a new Staff ID.



Monthly Process Step 6 - Resolve Near Matches (cont'd)

7. If the potential match staff record listed is the same as the input staff whose record is being resolved, click the **ASSIGN ID** button on the **Near Match Comparison** page to assign the staff ID from the existing record to the submission record. (If the potential match staff record listed is not the same, go to the next step)

| Vocational Information | | |
|--|---------------------------|---------------------------|
| District Code: | 450 - Henderson County | 450 - Henderson County |
| School Code: | 301 - Apple Valley Middle | 301 - Apple Valley Middle |
| Job Class: | | |
| Annual Salary: | | |
| Hire Date: | | |
| Alternate Staff ID: | 2 | 2 |
| Active: | Yes | Yes |
| <input type="button" value="Assign ID"/> <input type="button" value="Cancel"/> <input type="button" value="Back"/> | | |



Monthly Process Step 6 - Resolve Near Matches (cont'd)

8. If the staff listed is different from the input staff whose record is being resolved, a new Staff ID will be created. To create a new Staff ID:
 - I. Click the **BACK** button on the bottom of the **Near Match Comparison page**.
 - II. The system will display the Resolve Near Match Summary page.
 - III. Click the **CREATE NEW** button. The system will display a confirmation page displaying the newly created ID.

Resolve Match for Staff Member : 405969

Submission Record

| | | | | | | | |
|-------------|---------|----------------|------------|------------|----------------------|---------|-------|
| First Name: | Kathryn | Middle Name: | C | Last Name: | Myers | Suffix: | |
| Gender: | Female | Date Of Birth: | 01/20/1972 | Ethnicity: | White (Not Hispanic) | SSN: | ##### |

Create New

Cancel

Back To Batch Details

Potential Match (Staff Id: 5126768476 - Probability: 91.0%)

| | | | | | | | |
|-------------|---------|----------------|------------|------------|--------------------|---------|-------|
| First Name: | KRYSTAL | Middle Name: | K | Last Name: | MYERS | Suffix: | |
| Gender: | Female | Date Of Birth: | 01/20/1974 | Ethnicity: | Refused to Respond | SSN: | ##### |

Compare



Monthly Process Step 7 - Download Staff IDs

After the all data errors have been fixed, all near matches have been resolved and the ID assignment process has completed, Staff IDs can be downloaded. To download Staff IDs, perform the following steps:


1. Click the 'Download IDs' button.





Monthly Process Step 7 - Download Staff IDs (cont'd)


2. The system will display the **Download** module.
3. Complete the download form as pictured below.

Extract Options

* Template : eScholar Uniq-ID for Staff 2.0 Template 

* Field Delimiter : FIXED 

Field Qualifier : 

* Date Format : mm/dd/yyyy 

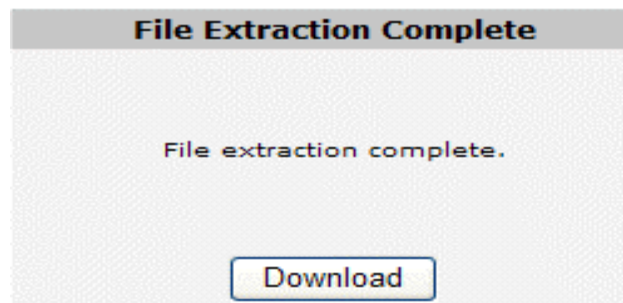
* Include Field Header : Yes No

4. Click the **Download** button.

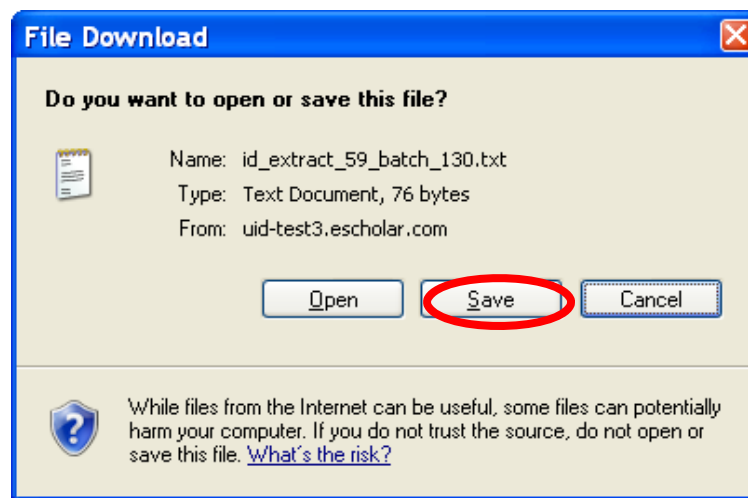


Monthly Process Step 7 - Download Staff IDs (cont'd)

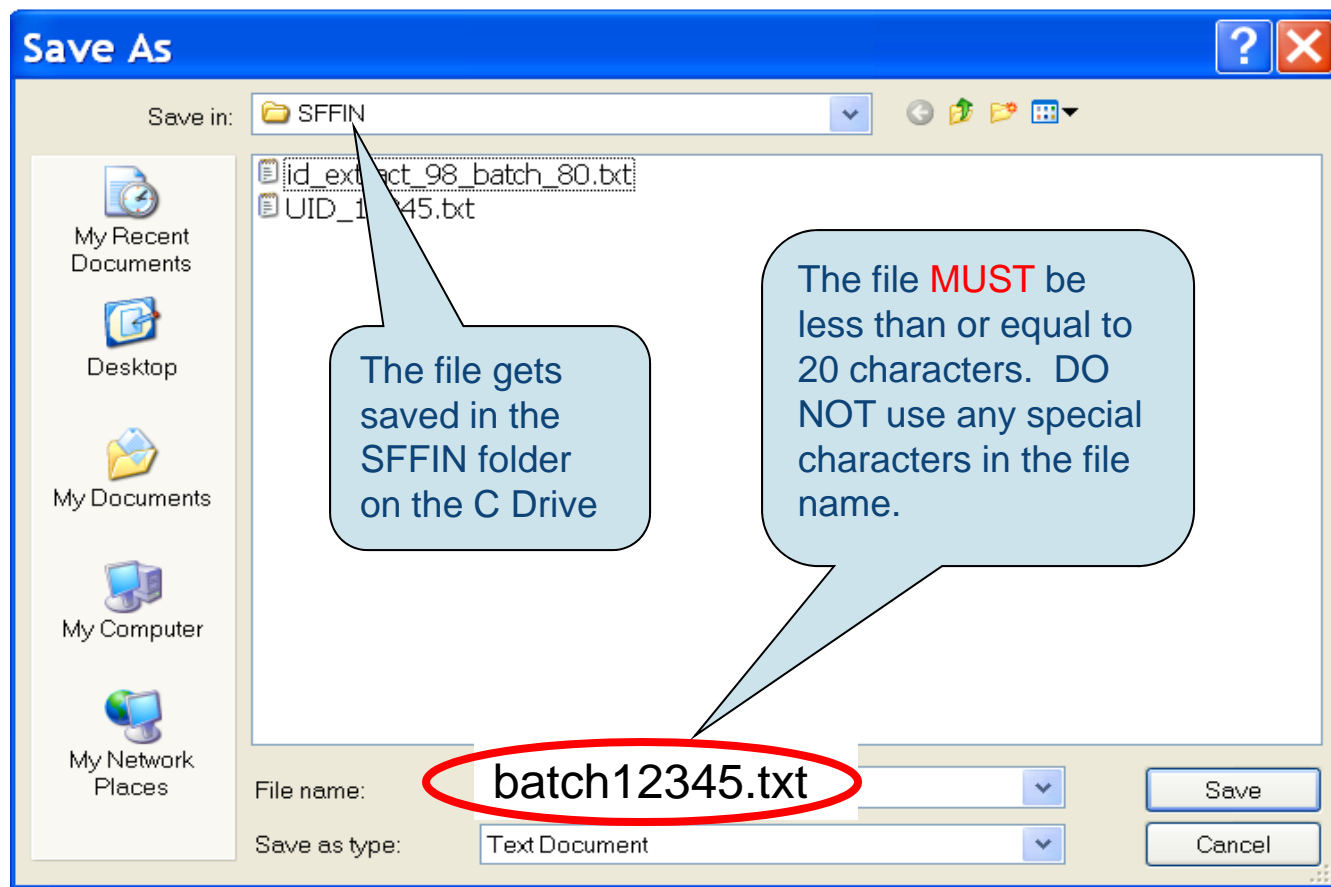
5. The system will briefly display a status message page and then a File Extraction complete notice. Click the Download button



6. The system will display a File Download prompt. Click the Save button.



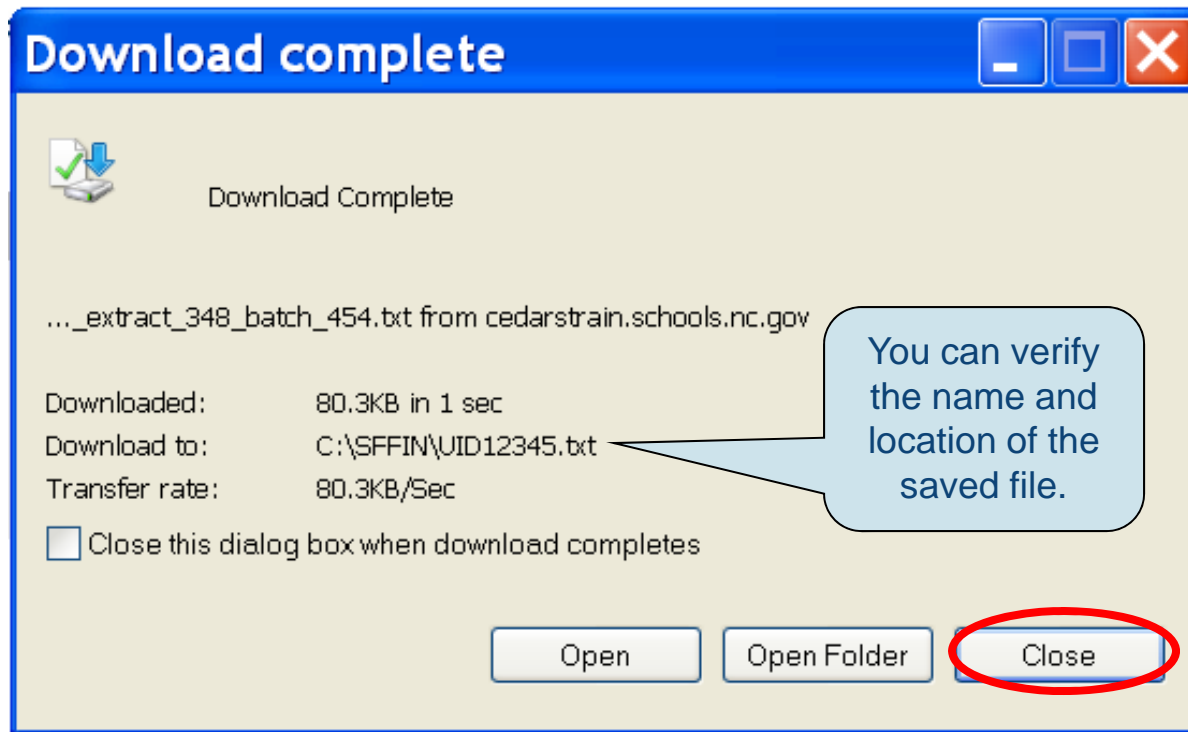
Monthly Process Step 7 - Download Staff IDs (cont'd)



- Save the downloaded CEDARS file of assigned Staff IDs to C:\SFFIN



Monthly Process Step 7 - Download Staff IDs (cont'd)

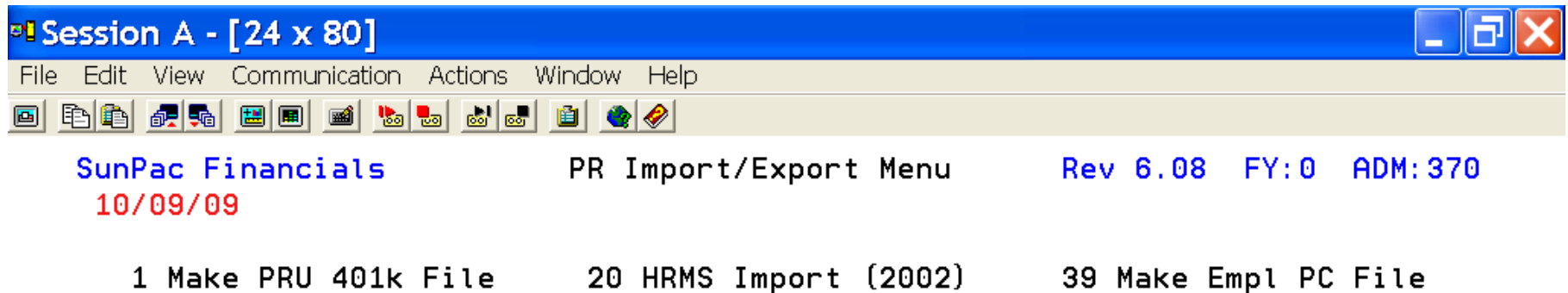


- Click the Close button.
- Return to the application home page by clicking the Home Page link in the Menu.



Monthly Process Step 8 - Import Assigned Staff ID File

- Login to SunPac and verify that the software version is 6.08.01 or later.
- Ensure you have access to import the CEDARS File to your payroll system.
- Ensure your FTP server has been started
- From the Payroll Main Menu, select option #36 *Import/Export Menu*



Monthly Process Step 8 - Import Assigned Staff ID File

Session A - [24 x 80]

File Edit View Communication Actions Window Help

SunPac Financials 10/09/09

PR Import/Export Menu

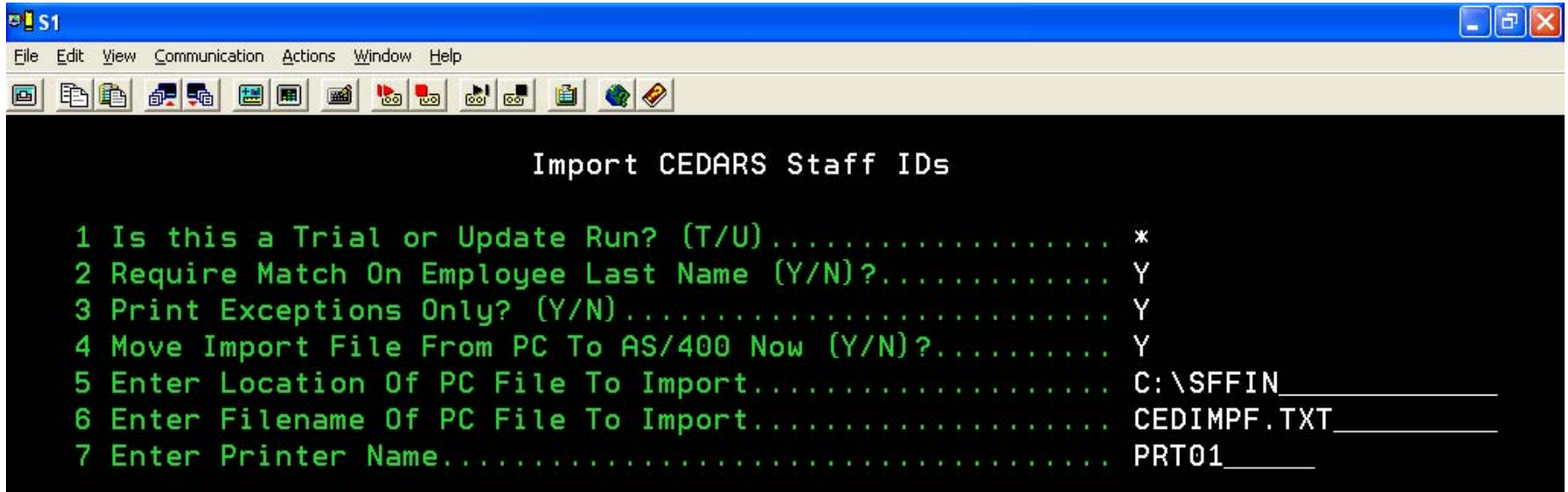
Rev 6.08 FY:0 ADM:370

| | | |
|-----------------------|------------------------|-------------------------|
| 1 Make PRU 401k File | 20 HRMS Import (2002) | 39 Make Empl PC File |
| 2 Make PRU 457b File | 21 HRMS Export (2002) | 40 Misc Ded Export |
| 3 ING Benefit Export | 22 Wellington Import | 41 Annual Leave Export |
| 4 GAP Benefit Export | 23 Wellington Export | 42 Export 125 Ded Plan |
| 5 CPI Benefit Export | 24 Healthcare Bal Rpt | 43 VEC Quarterly Export |
| 6 PlanWithEase Export | 25 Hershey Co. Export | 45 Import CEDARS File |
| | 26 Pierce Group Import | 46 Export CEDARS File |
| | 27 Pierce Group Export | |
| | 28 Mark III Import | |
| | 29 Mark III Export | |

- Select *Option #45 Import CEDARS File*. (Make sure you have access to the Import CEDARS File option)



Monthly Process Step 8 - Import Assigned Staff ID File



```
Import CEDARS Staff IDs

1 Is this a Trial or Update Run? (T/U) ..... *
2 Require Match On Employee Last Name (Y/N)?..... Y
3 Print Exceptions Only? (Y/N)..... Y
4 Move Import File From PC To AS/400 Now (Y/N)?..... Y
5 Enter Location Of PC File To Import..... C:\SFFIN_____
6 Enter Filename Of PC File To Import..... CEDIMPF.TXT____
7 Enter Printer Name..... PRT01_____
```

1. Is this a Trial or Update Run? U
2. Require Match on Employee Last Name? N
3. Print Exceptions Only? Y
4. Move Import File From PC to AS/400 Now? Y
5. Enter Location of PC File to Import.....C:\SFFIN
6. Enter Filename of PC File to Import.....(file name from Step 7).txt
7. Enter Printer Name.....‘QPRINT’ or enter other printer name



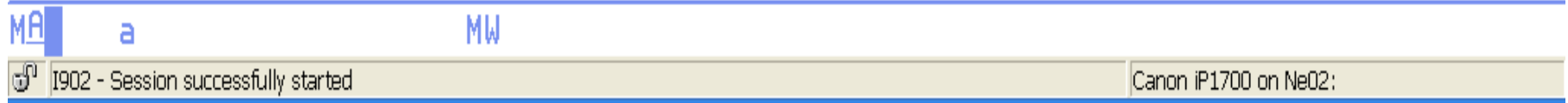
Monthly Process Step 8 - Import Assigned Staff ID File

F3=Exit

F9=Recall Options

F10=Save Option

F11=Submit to Batch



- Press 'Enter' to submit the job interactively. Errors will not be displayed on your screen with the 'F11=Submit to Batch' option.
 - The file is moved to the AS/400 where a process imports the CEDARS Staff IDs into the SunPac payroll system and saves them. Processing time will vary and can take several minutes depending upon the size of the file and the job currently running on the AS400.



Monthly Process Step 8 - Import File Error Correction

- If you received an error while importing your Staff ID file into your payroll system, check the following:
 - Verify that the Staff ID file was named correctly during the download.
 - Do not use any special characters or spaces in the file name.
 - File extension .txt is included in the upload
 - File name length not to exceed 20 characters (including extension)
 - Verify that the Staff ID file path and file name you are attempting to upload matches the path and file name used in the download process.
 - Recreate the file from the UID Staff System and attempt to import again
 - Ensure your FTP server is running. If the FTP server is not running, start the FTP server and attempt the import again.
 - There could have been a glitch during the Staff ID download process. Download the Staff ID file again from UID Staff and try uploading it into your payroll system again.
 - If you need assistance regarding errors received during the importing process into the SunPac payroll system, please call the Sartox Help Desk for assistance.



Viewing Imported Staff IDs in SunPac

State: NC Zip: 27970
Telephone 1: 9193331111 2:
Email:
Marital Status: S Sex: F Eth: 0
Retirement# Health Cert? Y
Earn CT, OT, or Exempt E (C/O/E)
Birth Date: 110555 Staff ID# 6663333331
Hire Date: 81808 (Orig) 81808 (Curr)

- The imported CEDARS Staff ID can be viewed on the *Employee Master File Update/Inquiry* Screen. (Note: Staff ID# is located to the right of the Birth Date.)

•Note: This is not real data



Best Practices

- Do not use the **REFRESH**, **BACK**, or **FORWARD** browser buttons. Always use the system links and buttons to navigate through UID Staff. Using the browser buttons will cause you to log back in to the system.
- During the Upload, Validation, or ID Assignment Processes, you do not have to remain on the page or keep your browser open. Once these processes have started, the system will continue to process the batch and you can check on the progress later.
- When determining if a record is a “Match” or “No Match”:
 - Review the “Near Match Details” page to view fields on the two staff members.
 - If fields are different between the two staff members, the background color will be yellow and the values within the fields are italicized.
 - Analyze the records offline if necessary by collecting and comparing more information.
 - If the matching staff is in a different school or school district, consider contacting the corresponding agency.
- Take note of the specific Batch ID you are working with so you can easily locate it in the future.



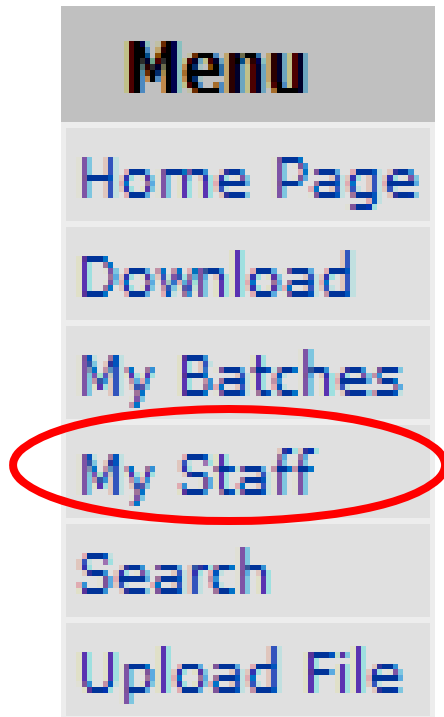
Other Menu Items - My Batches Module



- To access the My Batches Module, click the **My Batches** link from the Menu.
- This feature allows users to:
 - Review and all batches the user has loaded.
 - Users cannot see batches that have been loaded but other users within the same LEA.



Other Menu Items - My Staff Module



- To access the My Staff Module, click the **My Staff** link from the Menu.
- This module will provide a list of staff members assigned to the district in which the user has access.
- Users will be able to view additional details about these staff members.
- Note that staff information can be viewed, but not updated in the My Staff module.



Other Menu Items - Search Module



- To access the Search Module, click the **Search** link from the Menu.
- The Search feature can be used to verify the details about staff already in the UID Staff system.
- Note that staff information can be viewed, but not updated in the Search Module.



UID Staff Resources

- UID Staff Training Materials:
<http://www.ncpublicschools.org/cedars/uniqueid/staff/training/>
 - UID system information, FAQs, user contact list
- UID Staff Training site: <https://cedarstrain.schools.nc.gov/staffid/>
 - Use this site to practice working in UID Staff
- UID Staff Production site: <https://cedars.ncpublicschools.gov/staffid/>
 - This is the live data site where you will be working on your Staff data.
- UID Staff Quick Reference Documents:
<http://www.ncpublicschools.org/docs/cedars/uniqueid/staff/training/staff-reference.pdf>
 - This is the direct link to the UID Staff Quick Reference Documents.
- If you need assistance with the UID Staff process, please contact the DPI Help Desk at 919-807-4357 or dpi.incidents@its.nc.gov

