User Guide

Medicaid Eligibility Matching for Virginia School Divisions

in the University of Massachusetts Medical School

Online Matching System

Updated FY2020

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Questions
Call UMass at 1-800-535-6741 or email RMTSHelp@umassmed.edu

Matching School Division Student Roster to
Medicaid Eligibility Data - Quarterly

This guide will describe how to upload a list/roster of your school division's students into the online web-based Medicaid Eligibility Matching system and complete the matching process. These steps are necessary so that school divisions can calculate an accurate Medicaid Eligibility Rate and provide accurate student counts/statistics for the quarterly Administrative Activity Claims. This process must be completed on a quarterly basis prior to submitting your Administrative Activity Claim data to UMMS. The matching system may also be used to match your December 1st Special Education Child Count file to determine the eligibility statistics to be reported in your annual Direct Medical Services Cost Report and for uploading your Billing Compliance Review (BCR) population file, which is a component of the annual Cost Report. *(Note: For more information on the details of how Eligibility Statistics are used in any of these areas of the Medicaid and Schools Program, please refer to the instruction guides for Administrative Claims or Cost Reports.)*

Eligibility File Dates:

DMAS Eligibility Effective ("snapshot") Date	Fiscal Quarter	Results Used in (AAC / Cost Report)	School Division Students to be Included	School Division Student Enrollment Effective ("snaphot") Date
September 1	Q1 (7/1-9/30)	1st Quarter AAC	Division-wide total enrollment	September 1
December 1	Q2 (10/1-12/31)	2nd Quarter AAC	Division-wide total enrollment	December 1
December 1	Q2 (10/1-12/31)	Annual Cost Report	Dec. 1 Special Education Child Count	December 1
March 1	Q3 (1/1-3/31)	3rd Quarter AAC	Division-wide total enrollment	March 1
June 1	Q4 (4/1-6/30)	4th Quarter AAC	Division-wide total enrollment	June 1

Designating Personnel to Complete the Eligibility Match

School Divisions must designate in writing (using the School Based Medicaid Program Division Contact Designee Information Form) who is authorized to upload your School Division's student roster into the Student Medicaid Eligibility Matching System. Additionally, someone must be authorized to review the student data within the matching system and make decisions about 'Possible Matches.' These designees can both be the same person, or the different functions can be separated between more than one individual. The designee form is included as an appendix to this instruction guide.

Creating Upload Files

Prepare a list of the school division's students, aged 3 to 22 who meet the 'age of eligibility' requirements as described in the Virginia Administrative Code as of the 1st day of the 3rd month of the quarter, (3/1, 6/1, 9/1 and 12/1). The list of students must be put into Excel in the proper upload file format as shown below. All column headers/titles are mandatory, but not all fields are required to be populated with data.

Column Headings/Titles:

A. Student Unique ID*	H. Address Line 1*
B. RID (Medicaid ID)	I. Address Line 2
C. Last Name*	J. City*
D. First Name*	K. State*
E. Middle Name	L. Zip code*
F. Date of Birth*	M. SPED* (valid values = 'Y', 'N')
G. Gender*	N. Optional
	O. Parental Consent (valid values = 'Y', 'N')**

* Required data element
** Parental Consent is only needed when uploading a BCR Population file

An example of a completed upload file appears below. Also, a copy of the upload template is included as an appendix to this instruction guide.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Student Unique ID	RID	Last Name	First Name	Middle Name	Date of Birth	Gender	Address Line 1	Address Line 2	City	State	Zip code	SPED	Optional	Parental Consent
2	123	123456789012	APPLE	HOPE	ANN	02/02/2011	F	22 LETTUCE LANE		ANYTOWN	VA	24482	N		Y
3	125		ARTICHOKE	JESSICA		04/02/1999	F	404 PINEAPPLE PALACE		ANYTOWN	VA	24482	N		Y
4	126		BANANA	SUSIE	B	07/13/2001	F	100 MAIN STREET		ANYTOWN	VA	24482	N		Y
5	127	123456789876	CARROT	LUCY	L	12/08/2005	F	31-A SPINACH COURT		ANYTOWN	VA	24482	N		Y
6	128		DATE	DAVID	HARRY	03/23/2006	M	2101 STRAWBERRY FIELD	APT. B	ANYTOWN	VA	24482	N		Y
7	129		ENDIVE	EMMA	D	09/02/2008	F	119 CUCUMBER TERRACE		ANYTOWN	VA	24482	N		Y

When saving the file so that it can be uploaded into the system, the naming convention is: *SMM_SDVA_Provider #_Qtr_Year_Version#*

Example: Q2 2020 file for ABC School Division (Provider# = 4980999):
SMM_SDVA_4980999_2_2020_01

Uploading Files

School Divisions will be able to begin uploading files for a given quarter after the State file from DMAS has been created and verified in the system. UMMS will notify all designated uploaders when the quarterly files are available for matching, but it should be available approximately 5-10 days after the effective date of the file.

To upload your school division student roster:

Step 1: Under "*Student Medicaid Eligibility*" on the left navigation menu, select "*Upload*."

Step 2: Choose the Year, Quarter and School Division for your file.

Step 3: Click "*Choose File*" to find your file. Click "*Open*."

Step 4: Click "*Upload*." The file will show up on the list of files on the bottom section of the screen. The upload process takes a little bit of time, so you will need to click "Refresh" after a few minutes for the file status to change. *(Note: If you do not use the proper naming convention (see page 4) you will get an error message here.)*

The system will display this message indicating your file has been received and is being processed.

Your file has been queued for processing. The application will:
- Verify that data is in the proper format
- Upload the information
- Perform the automated matching process
The time needed to perform these steps will vary depending upon the size of your file and the number of other files that are in the queue.

Step 5: After the file is uploaded and there are no errors, the status of the file will change to "*Successful*." (from the upload screen) or "*Uploaded*" (from the review screen).

If your file has errors, you will need to click on the "*Error*" hyperlink to download a report which will identify the errors. Once you have corrected any errors with the upload file, delete the Error file by checking the box next to the file and clicking "*Delete*" Then upload a corrected file.

Upload Date ▼	Status	Record Count	Download	Uploaded By	☐
01/12/2015 05:20:00 PM	Error			JessH1	☑

Delete

Review the Results

Step 6: From the left navigation menu; Navigate to the "*Review*" option.

Step 7: Select the Year, Quarter, and School Division for your file, then click "*Search*"

Step 8: Click "*Uploaded*" to review the results and continue processing.

School District	File Name	Year	Qtr	Upload Date ▼	Status	Record Count	Download	Uploaded By	☐
Buchanan County Public Schools	SMM_SDVA_4981189_1_2017_99.XFR	2017	1	05/04/2017 05:26:16 PM	Uploaded	17	📊	AudetteE	☐

The automated matching process will compare all of the students on the school division's upload file to the DMAS statewide database of Medicaid, FAMIS and Medicaid Expansion recipients. Depending on the size of the upload file and the number of other school division files in the queue, this process could take up to a few hours. *(Note: You do not need to stay on the screen and wait for the process to complete. Once your file is in the queue, you may log out and come back later to view the results.)*

Results of the Automated Matching process:
The initial automated matching process will sort the students into 4 categories:

Auto Matched:* These students were an exact match to recipients in the DMAS eligibility file, based on last name, first name, DOB, gender and zip code.

Auto Rejected:* These students were not matches or even possible matches to any child in the DMAS eligibility file, no further review is needed.

Duplicate Match: This status indicates that the same Medicaid recipient (from the DMAS eligibility file) is a possible match to multiple students included in your school division upload file.

Possible Match: These students are close matches to one or more students in the DMAS eligibility file. Further review is required by the authorized designee. Details on how to review the file are below.

*To view these records you have to download the report. They are not available interactively.

Reviewing Duplicate Matches

It is important to review any duplicate matches first, prior to moving on to review your possible matches. This ensures that you can make the determination about which one of your students is actually the correct match for the Medicaid recipient in the DMAS file, then the system can appropriately match the remaining students.

Step 1: Select the Matching Status of "*Duplicate*" from the drop-down and click '*Search.*' *(Note: if there are no duplicates, you can move on to reviewing Possible Matches)*

All sets of duplicate matches are shown together on the page. There could actually be two or more sets of records that the system has determined are close matches to more than one student in the School Division upload file. The students are shown in color highlighted pairs (or multiples) to allow for easy comparison of the school division information to the DMAS eligibility information. The student's information highlighted in **red** indicates data elements from the DMAS file that are different from the school division's record for the student.

Step 2: Review each page of duplicates and decide whether to manually '*Match*', '*Non-Match*' or mark for '*Review Needed*' by clicking the appropriate box in the left hand columns, then click '*Save.*'

Step 3: Review **all pages** of duplicates before moving on to review Possible Matches. Navigate to the next set of duplicates (multiples) by clicking on the "*Next Page*" button.

Reviewing Possible Matches

All possible/close matches are reviewed interactively in the online system. By clicking the '*Uploaded*' link in the status column, you will be able to determine if the student is a '*Match*' or '*Non-Match*' to the closely matched DMAS recipient. Alternatively, the record may be moved to '*Review Needed*' for further review and follow-up.

Step 1: Select the Matching Status of "*Possible Match*" from the drop-down and click '*Search*.'

The students are shown in color highlighted pairs (or multiples) to allow for easy comparison of the school division information to the DMAS eligibility information. The student's information highlighted in red is from the DMAS file.

Step 2: Review each possible match pair (or multiples) and decide whether to manually '*Match*', '*Non-Match*' or mark for '*Review Needed*' by clicking the appropriate box in the left hand columns.

Step 3:   At any time, you can save your work by clicking on the "*Save*" button at the top or the bottom of the list of student records.
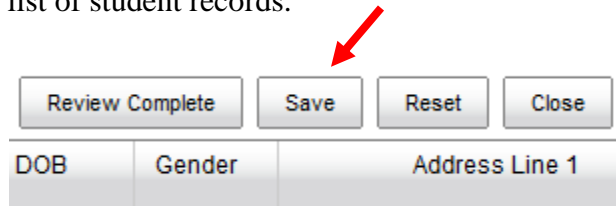
Clicking "*Save*" will process all of the records which were indicated as '*Match*,' '*Non-Match*' or '*Review Needed.*'

Assigning Records to "Review Needed"

The system allows the reviewer to set aside records, or a group of multiple records, for further review at a later time. This allows the reviewer to set aside or move the records out of the '*Possible Match*' status and continue working through the remaining possible matches where decisions can be made quickly and efficiently.

Step 1:   To access the records that have previously been indicated as '*Review Needed*,' select the Matching Status of "*Review Needed*" from the drop-down and click '*Search*.'
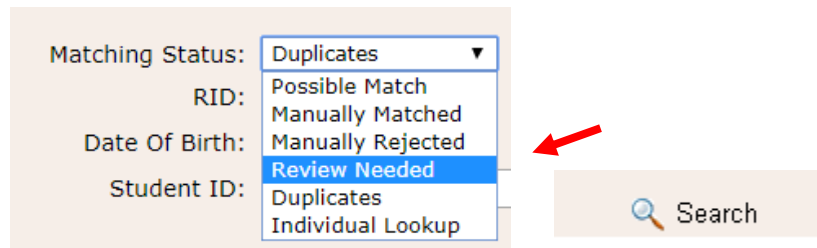
Step 2:   Indicate whether the records are a '*Match*' or '*Non-Match'* in the same method as previously described.

Review Complete

After all records have been reviewed and a matching determination has been made for any possible matches, the file must be marked as complete by clicking on the "*Review Complete*" button from the Review Screen. The button is located either above or below the list of records:

This completes the matching process. You are now ready to review your results.

Final Matching Reports:

After all possible matches have been reviewed; the system will sort the students into the following 8 categories:

Auto Matched: These students were an exact match to a recipient in the DMAS eligibility file.

Manually Matched: These students were manually matched to a recipient in the DMAS eligibility file.

History Matched: These students exactly matched a pair of records (School Division record and DMAS eligibility file record) that was previously manually matched.

Possible Matched: These students are close matches to one or more students in the DMAS eligibility file. Further review is required by school division personnel. *Note: Any students remaining in this status at the time that the file is marked as 'Review Completed' will be counted as a Non Match for the purpose of calculating the Medicaid Eligibility Percentage.*

Review Needed: These students were not manually matched or manually rejected. The school division reviewer assigned these records for further review. *Note: Any students remaining in this status at the time that the file is marked as 'Review Completed' will be counted as a Non Match for the purpose of calculating the Medicaid Eligibility Percentage.*

Auto Rejected: These students were not matches or even possible matches to any recipient in the DMAS eligibility file.

Manually Rejected: These students were manually determined not to match any recipient in the DMAS eligibility file.

History Rejected: These students exactly matched a pair of records ((School Division record and DMAS eligibility file record) that was previously manually rejected.

To view or download and save your results, simply click on the Excel icon from the Review screen as shown below:

The report file will be downloaded as an Excel Workbook with 8 different tabs for each of the categories that resulted from the matching process, plus a Summary Report page.

Troubleshooting Matching Issues:

After reviewing the results of the match, what can I do if I identify students who were Auto-Rejected or History Rejected, but I believe they have active Medicaid coverage?

- Remember that the Medicaid eligibility file is just a snapshot in time of what the eligibility looked like as of the effective date of the file. Sometimes changes are made retroactively to enrollment information after the file is generated, so those changes won't be reflected in the file.

- Sometimes the student's name, date of birth and gender as uploaded by the school division are substantially different from the spelling of the student's name or the date of birth on record in the DMAS file. So sometimes these students will fail to match successfully because there are just too many discrepancies.

    - To address this issue, if you know the student's Medicaid ID#, try adding that information to the upload file and re-uploading.

Summary Report:

The first (far left) tab on the downloaded Excel report is called "Summary Report." This report provides the summarized statistics that you will need to report in either a quarterly Administrative Activity Claim or in the annual Cost Report.

The Summary Report counts (summarizes or totals) the number of students in each of the matching categories. The detail tabs of the workbook (described above) provide the detailed list of students that fell into each category. These counts/totals are provided in the top section of the report appearing on rows 12 – 17:

	A	B	C	D	E	F	G	H	I	J
1	School Based Medicaid Eligibility									
2	Summary Report									
3	Effective Date:	12/01/2016								
4	Run Date:	01/04/2017								
5	Run Time:	11:26:05 AM								
6	School District:	ABC County Public Schools								
7	File Name:	SMM_SDVA_4979087_2_2017_02_20170104112603.XFR								
8	Number of Records in !	10403								
9	File Status:	Finalized								
10										
11										
12		AUTO MATCHED	MANUAL MATCHED	HISTORY MATCHED	POSSIBLE MATCH	REVIEW NEEDED	AUTO REJECTED	MANUALLY REJECTED	HISTORY REJECTED	Record Count
13										
14	Expansion	575	1	21	0	N/A	N/A	N/A	N/A	597
15	FAMIS	336	3	12	0	N/A	N/A	N/A	N/A	351
16	Medicaid	2431	20	64	0	N/A	N/A	N/A	N/A	2515
17	Total	3342	24	97	0	N/A	N/A	N/A	N/A	3463
18										

AAC or Cost Report Statistics:

The Summary Report also provides the statistics to be reported in your quarterly Administrative Activity Claim or in your Cost Report. This information is shown at the bottom of the report on rows 20 – 34.

Administrative Claim Data section will always be shown on the report.

19		
20	**Administrative Claim Data**	
21		
22	Total Eligible Students	3,112
23	Total Students	10403
24		
25	Medicaid Eligibility Rate	29.91%
26		
27	**Cost Report Data (Q2 Only)**	
28		
29	Total Medicaid Students	2,515
30	Total Expansion Students	597
31	Total FAMIS Students	351
32	Total Students	10403
33		
34	Medicaid Eligibility Rate	33.29%
35		

Note: FAMIS students have already been excluded in the count provided for AAC.

Cost Report Data section will only be shown with Q2 matching files.

Note: The system does not know what the uploaded list of students represents. In other words, it doesn't know if the results of the match will be used in an Administrative Claim or in a Cost report. So for Quarter 1, 3 and 4 files, only Administrative Claim Data statistics will be shown on the report, but for Quarter 2 files, since the file could be either a Child Count file for the Cost

Report or a division-wide roster for the AAC claim, both statistics will be provided. Please use whichever statistics you need depending on what file you are matching.

Individual Inquiry:

The Individual Inquiry feature processes the matching request exactly like uploading a list of students in a file, except it does it immediately, with an on-screen response, for an individual student at a time.

Step 1: Select "*Review*" from the left hand navigation menu, then select "*Individual Inquiry*" from the menu choices across the top of the screen.

Step 2: Navigate to the fiscal year and quarter that you need to match to by clicking on either "*Quarter*" or "*Year*" in the top right corner of the screen.

Step 3: Enter in the required fields of information about the student you wish to match. Required fields are indicated with a red asterisk. Then click "*Search*."

An exact match was found for your inquiry.

RID	Last Name	First Name	Middle Name	Date of Birth	Gender	Address Line 1	Address Line 2	City	State	Zip
12345678900	Apple	Haley		08/18/2003	F	100 ANYWHERE ST		Churchville	VA	244212429

The system will respond with the matching status for the student information submitted. If a match is found, the matching DMAS information, including the student's Medicaid ID, will be displayed.

The results of an Individual Inquiry may be downloaded as an Excel report if you wish by clicking on the Excel icon on the middle of the screen, near the Search and Clear buttons.

Step 3: To inquire about another student, click on the "*Clear*" button to clear out the previous search and repeat the process.

Appendix A:

VA SCHOOL BASED MEDICAID PROGRAM

The purpose of this form is to identify the individuals designated by the school division to provide information necessary for the administration of the Cost Report and Student Eligibility Matching on behalf of the division.

INSTRUCTIONS:

1. Please provide a Student Eligibility Matching Uploader (1) who will be responsible for uploading the eligibility file, and Review Matching Designee(s) who can review and make match decisions on behalf of the division (may have more than one reviewer.)

2. Please list only one Cost Report Preparer.

VA SCHOOL INFORMATION

School Division:	
Form Prepared by:	
Date:	

STUDENT ELIGIBILITY MATCHING

Uploader Name: _____ Email: _____
This person is also
a Reviewer (Y/ N) : _____ **(same as above)**

Reviewer Name: _____ Email: _____

Reviewer Name: _____ Email: _____

Reviewer Name: _____ Email: _____

COST REPORT PREPARER

Name: _____	Title: _____
Email:	

Please submit completed forms to: RMTSHelp@umassmed.edu
or
FAX 1 (508) 856-7643

University of Massachusetts Medical School
School-Based Medicaid Program
1-800-535-6741
((REV 5-15)

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Appendix B:

Student Unique ID	RID	Last Name	First Name	Middle Name	Date of Birth	Gender	Address Line 1	Address Line 2	City	State	Zip code	SPED	Optional	Parental Consent
100	99929431206 5	Sample	Student		1/19/2005	M or F	100 Anywhere Street		Somewhere	VA	01040	Use Y or N		Use Y or N
	(Medicaid ID)													
REQUIRED	REQUIRED	REQUIRED	REQUIRED		REQUIRED	REQUIRED	REQUIRED		REQUIRED	REQUIRED	REQUIRED	REQUIRED		REQUIRED for BCR ONLY

Row 1 - HEADER ROW - All header fields are REQUIRED and cannot be changed or deleted.

Row 2 - shows a sample of the data to put in the fields

Row 4 indicates REQUIRED fields (blank are optional but do not remove column)

Template/upload must be an Excel 97-2003 Workbook (.xls) or you will get an Error.

When you SAVE AS, re-name the file with the correct school number, Year and QTR you are uploading and save somewhere on your computer you can find it for uploading.

SMM_SDVA_223344_2_2017_01

223344 =SD number

Qtr = 2

FY = 2017

01 is the "number sequence"

Appendix C:

Hints & Tips for Preparing a School Division upload file
from the official December 1 Child Count File

For the annual Cost Report, the statistics to be reported must be based on your official, DOE Certified, December 1 Special Education Child Count. This file is also the key starting point when working on identifying the correct population of students that will be used to complete your Billing Compliance Review (BCR).

These instructions and tips are provided to assist school divisions with creating an Eligibility Matching Upload file by starting with the Certified Child Count file in its original format as prescribed by the Virginia Department of Education (DOE).

Step 1: Locate your official Certified Child Count file and save a copy of the file to work with. Let's call this file the "*Child Count Working File*."

Step 2: The Child Count file in DOE format contains many columns of data that are not needed for Medicaid eligibility matching. So in this step, identify the columns of data that **are** needed, and delete all the extra columns of data. The data elements/columns that you need to keep are:

> Students Last Name
> Students First Name
> Students Middle Name
> Unique Local Student Identifier
> Gender Code
> Birth Date

All other columns should be deleted. '*Save*' your file.

Step 3: Use the Unique Local Student Identifier field in the Child Count file to match the students to another data source which includes the address information and Medicaid ID numbers (if known) for these students.

Option A: Using the Local Student Identifier (Student ID#), match the child count list to a report generated from your Student Information Management system to pick up the address information for the students. You may want to ask your IT department for assistance with this.

Option B: Using the Local Student Identifier (Student ID#), match the Child Count Working File to the division-wide eligibility file that you have previously used for completing the Quarter 2 AAC claim match. If you use your matching results file to complete this step, you can also pick up the Medicaid ID numbers for any eligible students at the same time.

Start by creating a master list of students from an Eligibility Matching Results Workbook:

Step 1: Combine all the different tabs of the matching results workbook onto one tab of a brand new Excel workbook.
  a. Download your Quarter 2 division-wide eligibility matching results file from the system and save it to your computer.
  b. Create/Open a brand new blank Excel workbook.
  c. From the matching results file, start with the Auto Matched tab. ***Copy*** from row 12 (title row that says in gray bar 'School Division Upload File') down to the last row with a student listed on this tab. *(Tip: Highlighting the entire rows by Left Clicking on the row number. Start at row #12, then hold down the left mouse clicker as you highlight down the page. With all the rows still highlighted, lift your finger off the left clicker, then Right Click on your mouse to access the shortcut menu, and choose 'Copy')*

  d. Then ***Paste*** the data into your blank Excel workbook.
      • Click on the top left cell in the blank workbook – Cell A1
      • Right Click on your mouse to access the shortcut menu, and choose '*Paste*'

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e. Your new Excel workbook page should look like this:

f. Save your new Excel workbook at this point so that you don't lose your work. Let's call your newly saved file the '*Master File*.'

g. Now repeat almost the same process with the Manually Matched students from your Eligibility Matching Results file. The only difference this time is that you don't need the row headings/titles for the rest of the tabs, so you should start copying at row 15.

h. This time when you paste into your new Master File, you will '*Paste*' starting on the row immediately below the last populated row from the prior step.

In this example, the last student that I copied in from the Auto-Matched tab is on row 10, so I will click on cell A-11, then Right Click and '*Paste*' my Manually Matched students.

i. Repeat this copy/paste process for the remaining tabs of the Eligibility Results file.

Step 2: In this step, you will clean up your Master File to get it down to just the information that you need.

    a. If you haven't done so recently, this is a good point to '*Save*' your Master File.

    b. Copy the Medicaid ID number from the DMAS Eligibility File section of the report to the School Division Upload File section of the report. In other words, copy Column Q into Column C.

	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
						School Division Upload File															DMAS Elig
	SD Uniqu	RID	Last Nar	First Nar	Middle N	Date of I	Gender	Address	Address	City	State	Zip	SPED	Optional			RID	Last Nar	First Nar	Middle N	Date of I	Gender
	23611		APPLE	AUDRINA	MARIE	10/02/2008	F	1684 EMEF		ANYWHER	VA	12345	N				999123456	APPLE	AUDRINA	M	10/02/2008	F
	12174		APPLE-BEI	COOPER	KARDAE'	09/05/2005	M	1684 EMEF		ANYWHER	VA	12345	N				999123456	APPLE-BEI	COOPER	K	09/05/2005	M
	23950		ALMOND	AMIR	LAPREE	08/13/2004	M										999123456	ALMOND	AMIR	L	08/13/2004	M
	6745		ANISE	A'NYEJA	MONTAE	12/05/1999	F										999123456	ANISE	A'NYEJA	M	12/05/1999	F
	14807		ANISE	AH'JANAE	LASHAE	04/25/2006	F										999123456	ANISE	AH'JANAE	L	04/25/2006	F
	6876		BANANA	BENNETT	GRACE	08/15/2001	M										999123456	BANANA	BENNETT	G	08/15/2001	M
	10088		BUTTERNU	CAMARON	JOSEPH	02/26/2003	M										999123456	BUTTERNU	CAMARON	J	02/26/2003	M

> Click on column letter Q to highlight the whole column. Then Right Click and '*Copy*,' then click on column letter C to highlight that whole column. Now Right Click and choose '*Paste*.'

    c. Now you're done with the DMAS Eligibility File part of your Master File so you can delete all those columns. Delete columns Q through AC.

Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
						Eligibility File						
RID	Last Nar	First Nar	Mi			er	Address	Address	City	State	Zip	Medicaic	Last Revie
999123456	APPLE	AUDRINA	M				1684 EME		ANYWHER	VA	12345	MEDICAID	
999123456	APPLE-BEI	COOPER	K				1684 EME		ANYWHER	VA	12345	MEDICAID	
999123456	ALMOND	AMIR	L				5929 W WI		ANYWHER	VA	12345	MEDICAID	
999123456	ANISE	A'NYEJA	M				736 PRITC						
999123456	ANISE	AH'JANAE	L				736 PRITC						
999123456	BANANA	BENNETT	G				2120 SYCA						
999123456	BUTTERNU	CAMARON	J				311 SCHO						

(Right-click menu shown: Cut, Copy, Paste Options:, Paste Special..., Insert, Delete, Clear Contents, Format Cells..., Column Width..., Hide, Unhide)

> Click on column letter Q and drag right through column AB to highlight all the columns to be deleted. Then Right Click and select '*Delete*.'

    d. Your Master File should now look like this:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1							School Division Upload File									
2																
3		SD Unique ID	RID	Last Name	First Name	Middle Name	Date of Birth	Gender	Address Line 1	Address Line 2	City	State	Zip	SPED	Optional	
4		23611	999123456781	APPLE	AUDRINA	MARIE	10/02/2008	F	1684 EMERY RD		ANYWHERE	VA	12345	N		
5		12174	999123456782	APPLE-BERRY	COOPER	KARDAE'	09/05/2005	M	1684 EMERY RD		ANYWHERE	VA	12345	N		
6		23950	999123456783	ALMOND	AMIR	LAPREE	08/13/2004	M	5929 WHISPERING P		ANYWHERE	VA	12345	N		
7		6745	999123456784	ANISE	A'NYEJA	MONTAE	12/05/1999	F	736 PRITCHETT LN		ANYWHERE	VA	12345	N		
8		14807	999123456785	ANISE	AH'JANAE	LASHAE	04/25/2006	F	736 PRITCHETT LN		ANYWHERE	VA	12345	N		
9		6876	999123456786	BANANA	BENNETT	GRACE	08/15/2001	M	297 DR MEASE DR		ANYWHERE	VA	12345	N		
10		10088	999123456787	BUTTERNUT	CAMARON	JOSEPH	02/26/2003	M	311 SCHOOL RD		ANYWHERE	VA	12345	N		

Step 3: Now we have 2 files: The *Child Count Working File* and our *Master File*.

    a. The *Master File* should include all students enrolled in our school division as of December 1 of the fiscal year – everybody – not just Special Education students.

b. The *Child Count Working File* should be a subset of the Master File because it should be a list of only the Special Education students across the division as of December 1 of the fiscal year.

In this step, we're going to match these 2 files to create a list of students in our December 1 Child Count which includes all the needed information for completing an eligibility match.

Starting with the *Master File*:

1. Delete Column A (which should be a blank column) and rows 1 and 2 which are unnecessary rows above the column headings.

After deleting, your file should look like this:

2. Copy your information from the *Child Count Working File* into the *Master File*.

a. Starting with the *Child Count Working File*, highlight the 6 columns that have data, then '*Copy*'

b. Then go to your *Master File*, click in cell P1, then '*Paste*'

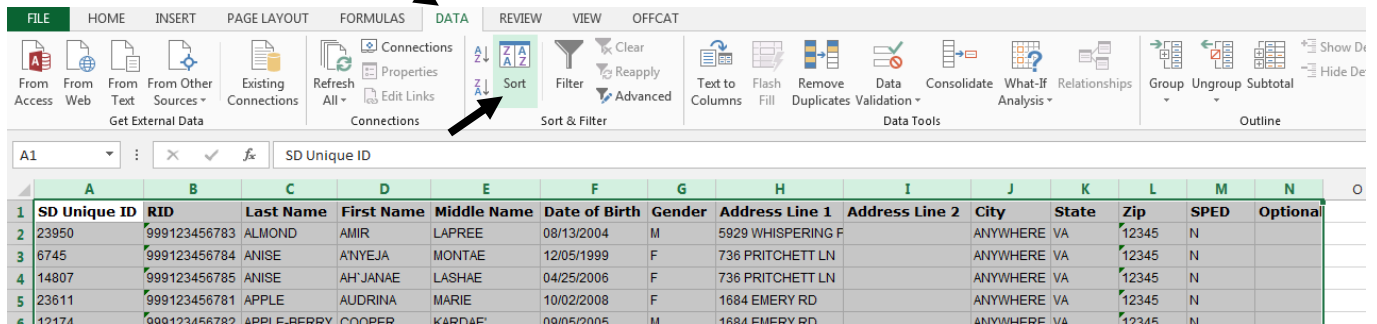|	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	First Name	Middle Name	Date of Birth	Gender	Address Line 1	Address Line 2	City	State	Zip	SPED	Optional			
2	AMIR	LAPREE	08/13/2004	M	5929 WHISPERING F		ANYWHERE	VA	12345	N				
3	A'NYEJA	MONTAE	12/05/1999	F	736 PRITCHETT LN		ANYWHERE	VA	12345	N				
4	AH`JANAE	LASHAE	04/25/2006	F	736 PRITCHETT LN		ANYWHERE	VA	12345	N				
5	AUDRINA	MARIE	10/02/2008	F	1684 EMERY RD		ANYWHERE	VA	12345	N				
6	COOPER	KARDAE'	09/05/2005	M	1684 EMERY RD		ANYWHERE	VA	12345	N				
7	BENNETT	GRACE	08/15/2001	M	297 DR MEASE DR		ANYWHERE	VA	12345	N				
8	BRENDA	LINDSEY	08/13/2004	M	1985 HAPPY PLACE		ANYWHERE	VA	12345	N				
9	CAMARON	JOSEPH	02/26/2003	M	311 SCHOOL RD		ANYWHERE	VA	12345	N				
10	CARLA		04/25/2006	M	200 JONES RD		ANYWHERE	VA	12345	N				
11	CHARLES	JAMES	12/05/1999	M	500 PALACE PKWY		ANYWHERE	VA	12345	N				
12	CINDY	ANNE	08/13/2004	M	101 MAIN ST		ANYWHERE	VA	12345	N				
13	SALLY	JANE	12/05/1999	M	675 GATEWAY RD		ANYWHERE	VA	12345	N				

Click in cell P1, then right click and '*Paste*'

After copying the Child Count data into your *Master File*, the *Master File* should look like this:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	SD Unique ID	RID	Last Name	First Name	Middle Name	Date of Birth	Gender	Address Line 1	Address Line 2	City	State	Zip	SPED	Optional		Last Name	First	Middle	Local	Code	Birth date
2	23950	999123456783	ALMOND	AMIR	LAPREE	08/13/2004	M	5929 WHISPERING F		ANYWHERE	VA	12345	N			Apple	Audrina	M	23611	F	10/2/2008
3	6745	999123456784	ANISE	A'NYEJA	MONTAE	12/05/1999	F	736 PRITCHETT LN		ANYWHERE	VA	12345	N			Apple-Berry	Cooper	K	12174	M	9/5/2005
4	14807	999123456785	ANISE	AH`JANAE	LASHAE	04/25/2006	F	736 PRITCHETT LN		ANYWHERE	VA	12345	N			Almond	Amir	L	23950	M	8/13/2004
5	23611	999123456781	APPLE	AUDRINA	MARIE	10/02/2008	F	1684 EMERY RD		ANYWHERE	VA	12345	N			Anise	A'nyeja	M	6745	F	12/5/1999
6	12174	999123456782	APPLE-BERRY	COOPER	KARDAE'	09/05/2005	M	1684 EMERY RD		ANYWHERE	VA	12345	N			Anise	Ah`Janae	L	14807	F	4/25/2006
7	6876	999123456786	BANANA	BENNETT	GRACE	08/15/2001	M	297 DR MEASE DR		ANYWHERE	VA	12345	N			Banana	Bennett	G	6876	M	8/15/2001
8	1010	999123456791	BLUEBERRY	BRENDA	LINDSEY	08/13/2004	M	1985 HAPPY PLACE		ANYWHERE	VA	12345	N			Butternut	Camaron	J	10088	M	2/26/2003
9	10088	999123456787	BUTTERNUT	CAMARON	JOSEPH	02/26/2003	M	311 SCHOOL RD		ANYWHERE	VA	12345	N								
10	10099	999123456790	CARROT	CARLA		04/25/2006	M	200 JONES RD		ANYWHERE	VA	12345	N								

3. In this step, you will match up the 2 lists of students that are now combined onto one page of your *Master File*.
   a. Sort both lists in order by the Student ID #
      i. Sort the list on the left by highlighting columns A through N, then from the menu across the top of the page, choose '*Data*', then '*Sort*'

|	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	SD Unique ID	RID	Last Name	First Name	Middle Name	Date of Birth	Gender	Address Line 1	Address Line 2	City	State	Zip	SPED	Optional	
2	23950	999123456783	ALMOND	AMIR	LAPREE	08/13/2004	M	5929 WHISPERING F		ANYWHERE	VA	12345	N		
3	6745	999123456784	ANISE	A'NYEJA	MONTAE	12/05/1999	F	736 PRITCHETT LN		ANYWHERE	VA	12345	N		
4	14807	999123456785	ANISE	AH`JANAE	LASHAE	04/25/2006	F	736 PRITCHETT LN		ANYWHERE	VA	12345	N		
5	23611	999123456781	APPLE	AUDRINA	MARIE	10/02/2008	F	1684 EMERY RD		ANYWHERE	VA	12345	N		
6	12174	999123456782	APPLE-BERRY	COOPER	KARDAE'	09/05/2005	M	1684 EMERY RD		ANYWHERE	VA	12345	N		

      ii. In the dialogue pop-up window, make sure that 'My data has headers' is checked, and then choose to *Sort by* 'SD Unique ID' from the drop down, then click '*Okay.*'
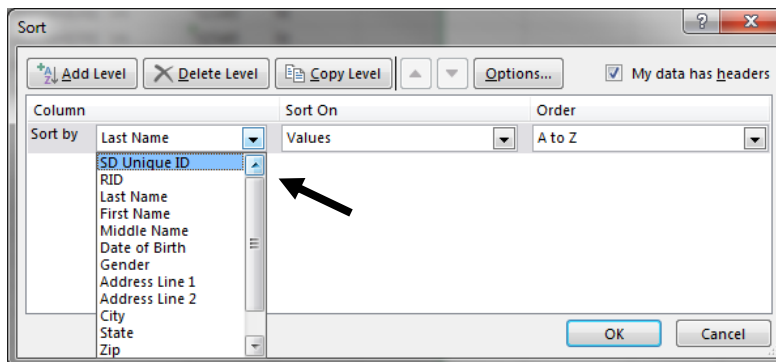
iii. Repeat the same procedure to sort the list on the right by highlighting all of columns P through U, then choose '*Data*' and '*Sort*'

	P	Q	R	S	T	U	V
	Students Last Name	Students First Name	Students Middle Name	Unique Local Student Identifier	Gender Code	Birth date	
	Apple	Audrina	M	23611	F	10/2/2008	
	Apple-Berry	Cooper	K	12174	M	9/5/2005	
	Almond	Amir	L	23950	M	8/13/2004	
	Anise	A'nyeja	M	6745	F	12/5/1999	
	Anise	Ah'Janae	L	14807	F	4/25/2006	
	Banana	Bennett	G	6876	M	8/15/2001	
	Butternut	Camaron	J	10088	M	2/26/2003	

iv. This time you'll sort by 'Unique Local Student Identifier' which should also be your Student ID #
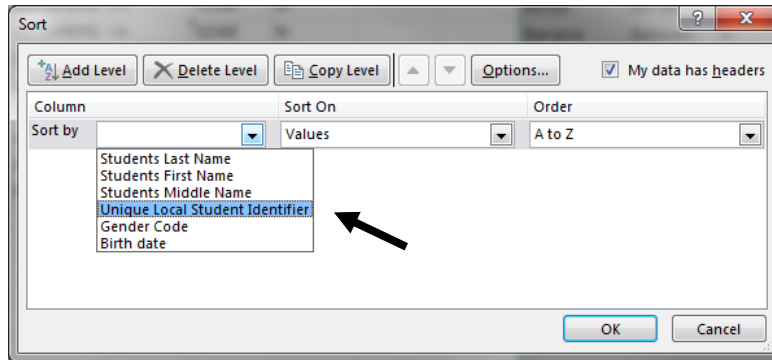
b. Match the lists using a formula that will match on the Student ID#
   i. Add a column title to Column O called "*Missing?*"
   ii. In Cell O2 enter this formula *(Note: in the example, the student ID# is in column A and S)*:

   =ISNA(MATCH(A2,S:S,FALSE))

   iii. Copy the formula down to the bottom of the list of students

*f*x   =ISNA(MATCH(A2,S:S,FALSE))

C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
Last Name	First Name	Middle Name	Date of Birth	Gender	Address Line 1	Address Line 2	City	State	Zip	SPED	Optional	Missing?	Students Last Name	Students First Name	Students Middle Name	Unique Local Student Identifier	Gender Code	Birth date
BLUEBERRY	BRENDA	LINDSEY	08/13/2004	M	1985 HAPPY PLACE		ANYWHERE	VA	12345	N		TRUE	Anise	A'nyeja	M	6745	F	12/5/1999
ANISE	A'NYEJA	MONTAE	12/05/1999	F	736 PRITCHETT LN		ANYWHERE	VA	12345	N		FALSE	Banana	Bennett	G	6876	M	8/15/2001
BANANA	BENNETT	GRACE	08/15/2001	M	297 DR MEASE DR		ANYWHERE	VA	12345	N		FALSE	Butternut	Camaron	J	10088	M	2/26/2003
BUTTERNUT	CAMARON	JOSEPH	02/26/2003	M	311 SCHOOL RD		ANYWHERE	VA	12345	N		FALSE	Apple-Berry	Cooper	K	12174	M	9/5/2005
LETTUCE	CINDY	ANNE	08/13/2004	M	101 MAIN ST		ANYWHERE	VA	12345	N		TRUE	Anise	Ah'Janae	L	14807	F	4/25/2006
SPINACH	SALLY	JANE	12/05/1999	M	675 GATEWAY RD		ANYWHERE	VA	12345	N		TRUE	Apple	Audrina	M	23611	F	10/2/2008
CARROT	CARLA		04/25/2006	M	200 JONES RD		ANYWHERE	VA	12345	N		TRUE	Almond	Amir	L	23950	M	8/13/2004
CELERY	CHARLES	JAMES	12/05/1999	M	500 PALACE PKWY		ANYWHERE	VA	12345	N		TRUE						
APPLE-BERRY	COOPER	KARDAE'	09/05/2005	M	1684 EMERY RD		ANYWHERE	VA	12345	N		FALSE						
ANISE	AH'JANAE	LASHAE	04/25/2006	F	736 PRITCHETT LN		ANYWHERE	VA	12345	N		FALSE						
APPLE	AUDRINA	MARIE	10/02/2008	F	1684 EMERY RD		ANYWHERE	VA	12345	N		FALSE						
ALMOND	AMIR	LAPREE	08/13/2004	M	5929 WHISPERING F		ANYWHERE	VA	12345	N		FALSE						

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iv. *Copy* and *Paste Special Values* on the "Missing?" Column O
   1. Highlight all of Column O, then *Right Click* and select '*Copy*'
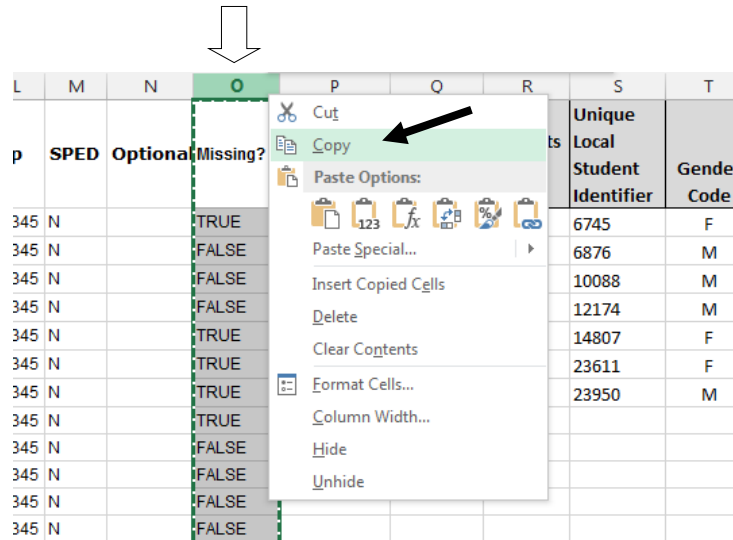
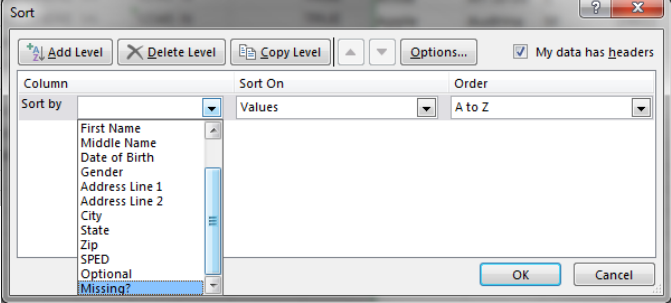2. Then, with Column O still highlighted, *Right Click* again and select *Paste Options: Values* as shown (choose the '123' icon:)
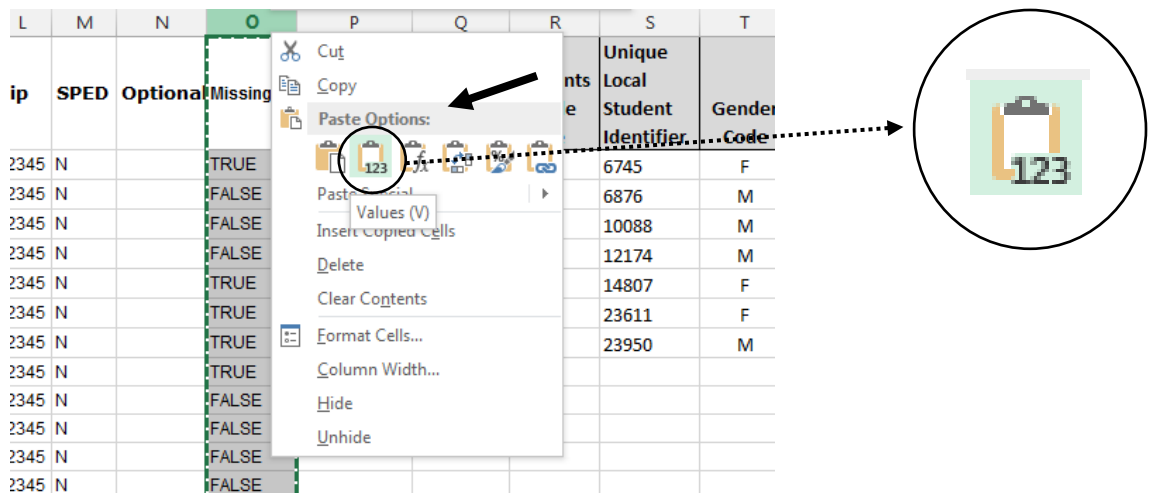
v. Sort columns A through O by the *Missing?* Column
   1. Highlight all columns A – O
   2. From the '*Data*' menu, select '*Sort*'
   3. Sort by '*Missing?*'

vi. Excel will sort the 'False' response to the Missing? question to the top of the page. This should line up the records on the left from your Master File with the information on the right, from your Child Count.

1. To confirm, add an 'if' statement to check

a. Insert a new Column between columns O and P by clicking on column P to highlight the whole column, then *Right Click* and choose '*Insert*'

b. Add a title to the new column, called '*Match?*'
c. In Cell P2 enter this formula (Note: in the example, the student ID# is in column A and T):

=IF(A2=T2,"ok","ERR")

d. Copy the formula down to the last '*False*' in the 'Missing?' column in the list of students

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`fx` | =IF(A2=T2,"ok","ERR")

	Last Name	First Name	Middle Name	Date of Birth	Gender	Address Line 1	Address Line 2	City	State	Zip	SPED	Optional	Missing?	Match?	Students Last Name	Students First Name
	ANISE	A'NYEJA	MONTAE	12/05/1999	F	736 PRITCHETT LN		ANYWHERE	VA	12345	N		FALSE	ok	Anise	A'nyeja
	BANANA	BENNETT	GRACE	08/15/2001	M	297 DR MEASE DR		ANYWHERE	VA	12345	N		FALSE	ok	Banana	Bennett
	BUTTERNUT	CAMARON	JOSEPH	02/26/2003	M	311 SCHOOL RD		ANYWHERE	VA	12345	N		FALSE	ok	Butternut	Camaron
	APPLE-BERRY	COOPER	KARDAE'	09/05/2005	M	1684 EMERY RD		ANYWHERE	VA	12345	N		FALSE	ok	Apple-Berry	Cooper
	ANISE	AH'JANAE	LASHAE	04/25/2006	F	736 PRITCHETT LN		ANYWHERE	VA	12345	N		FALSE	ok	Anise	Ah'Janae
	APPLE	AUDRINA	MARIE	10/02/2008	F	1684 EMERY RD		ANYWHERE	VA	12345	N		FALSE	ok	Apple	Audrina
	ALMOND	AMIR	LAPREE	08/13/2004	M	5929 WHISPERING F		ANYWHERE	VA	12345	N		FALSE	ok	Almond	Amir
	BLUEBERRY	BRENDA	LINDSEY	08/13/2004	M	1985 HAPPY PLACE		ANYWHERE	VA	12345	N		TRUE			
	LETTUCE	CINDY	ANNE	08/13/2004	M	101 MAIN ST		ANYWHERE	VA	12345	N		TRUE			
	SPINACH	SALLY	JANE	12/05/1999	M	675 GATEWAY RD		ANYWHERE	VA	12345	N		TRUE			
	CARROT	CARLA		04/25/2006	M	200 JONES RD		ANYWHERE	VA	12345	N		TRUE			

    e.   If you have all 'ok' responses, then you're good!

4. Clean up your file to create an Eligibility Matching upload file
    a.   Delete all extra rows of students who aren't matched to your Child Count
    b.   Delete the extra columns to the right where your Child Count information was
    c.   Copy and paste into an Eligibility Matching Upload template and you're ready to upload a matching file with your Certified December 1 Child Count roster!

    Good job!