



# Direct Certification Application (DCA) Linking Students with Potential Matches

**Students with Potential Matches** are students that potentially match to an eligibility source record.

## Matching Comparative Datasets

### EDUCATE Student Data

Schools report student data to OPI student info system EDUCATE (formerly AIM)

- First Name
- Last Name
- Middle Name (if avail)
- Date of Birth
- Gender

### Eligibility Source Programs

Program data received from SNAP, TANF, Income-Based Medicaid Programs, FDPIR, & Foster Care

- First Name
- Last Name
- Middle Name (if avail)
- Date of Birth
- Gender (if avail)

### Automatic Matching

When comparative datasets from the State’s student information system EDUCATE, confidently match eligibility source data in DCA, the two records are linked as one and the same person. Most matches are performed automatically in DCA.

**Students linked to an eligibility source will only show Direct Cert status if their program source is *active* in the *current SY*.**

### Potential Matches

When the datasets are similar, but not close enough to match, it is considered a potential match. Potential matches display on a list view and require human intervention to review and determine if the records should be linked/matched.

### Minimum Frequency Requirement for Schools

Reviewing the list of students with potential matches should be incorporated as part of the direct certification process. USDA regulation require schools to conduct direct certification activities a minimum of three times during the SY and within the minimum frequency schedule.

#### Minimum Frequency of Direct Certification Activities

- 1.) Beginning of the school year
- 2.) Three months after the beginning of the school year
- 3.) Six months after the beginning of the school year

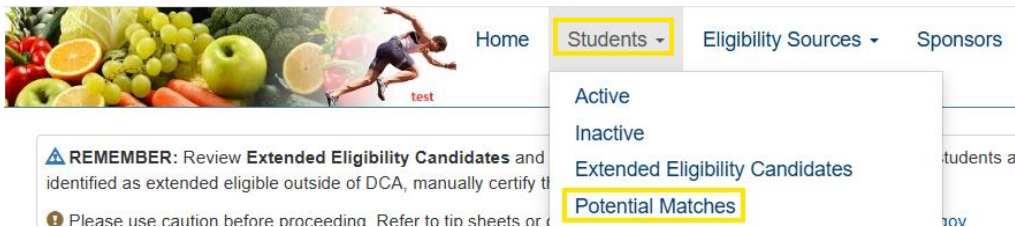
More frequent (monthly) efforts are encouraged to ensure students receive eligible meal benefits and are claimed accordingly.

CEP schools accredited by OPI that report students in EDUCATE are exempt from this requirement but encouraged to review direct certification data in DCA annually (potential matches, manually certify extended eligible).

Private CEP schools that are not OPI-accredited will need to work with OPI-SNP to conduct an annual match of direct cert data by April 1<sup>st</sup>.

### Instructions to Link Potential Matches:

- Once logged into DCA, locate the ‘Students’ menu at the top of the screen and select the ‘Potential Matches’ view. This will display your district’s list of students with potential matches.



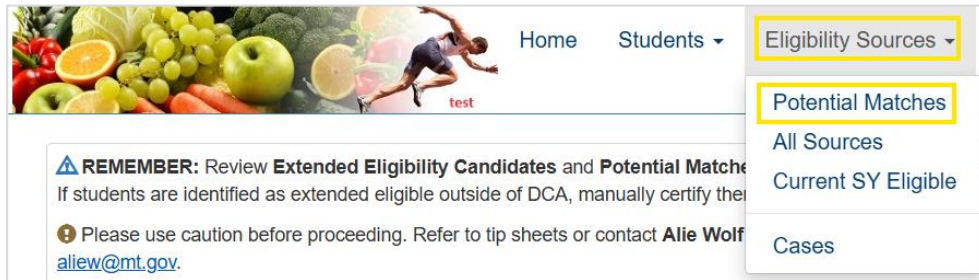
If your district has no potential matches, a message relaying 0 referrals/students, will appear.

## The List of Potential Matches displays the comparable datasets to review:

- The **EDUCATE (IC) Student** data is shown as the first record on top.
- The **Eligibility Source** record(s) are shown directly below the student record.
  - Note: The Source column relays the participant’s eligible program.
  - Note: The Active column relays the source’s active status and determines direct cert eligibility.
  - A student may have more than one eligibility source program.
- Each Student and their Potential Matches are grouped together. A thick black line separates the next dataset to compare.

Link	Invalid	Confidence	Active	Source	First	Last	MI	Gender	DOB	Sponsor	School	Grade	ID	City
		85		IC Student	Martha	Washington	E	F	3/8/2010	Helena Public Schools	C R Anderson Middle Schl	06	109573004	
				SNAP/TANF/MA	Martha	Washington	B	F	3/8/2010				6078881	Heron

There is a second potential matches list found under the Eligibility Sources menu:



It functions similarly to the Students potential matches but conversely lists the eligibility source on the top line followed by the possible student matches to that source.

## Compare Data and Determine Matches

- If the Student and Eligibility Source are the **same person**, click the **green plus button** to **link** the records together.
- If the Student and Eligibility Record are **different people**, click the **red minus** to **invalidate** the records.
- Continue reviewing the list of potential matches.

## Unsure if they Match?

The eligibility source record contains additional details such as addresses, parent and sibling names. Use available school records to compare and determine match status.

- Click the Eligibility Source’s **ID Number** or **Name** to review additional information on the participant.
  - Click on the **Case Number** to view **Sibling Names** listed within the ‘Sources’ for that case.
- Does the participant’s information match the student in question (address, parent/sibling names)?
  - A single eligibility source program can be associated to multiple cases.

## Search for Records

Eligibility Source records are available for lookup and referencing.

- Locate the ‘**Eligibility Sources**’ menu and select ‘**Cases**’ or ‘**Current SY Eligible**’ or ‘**All Sources**’ to search for eligibility records.
  - From the Cases list view or the Current SY Eligible list view
    - Search by: First Name, Last Name, Source, ID or Case Number
    - The cases list displays all open and closed cases
    - The Current SY Eligible sources are only those that are valid for the current school year, July 1 – June 30

- From the Eligibility Sources - All list view, use the search lookup (**magnifying glass**) in the upper-right corner.
    - Search by: First Name, Last Name, Source ID
    - This list includes all active and inactive program sources
- Student Searches may also be performed in similar fashion – Select Students view from Students menu and search.



### Confirm the Status of an Eligibility Source Record

- Lookup the Name or Case Number and review the ‘Active Programs’.
  - If the Eligibility Source is **active**, the ‘Active Programs’ section displays the relevant program dates.
  - If the Eligibility Source is **inactive**, the ‘Active Programs’ section will contain no data.
  - An individual Eligibility Source record may be inactive however be associated to an **active** Case.
    - For SNAP, TANF, Income-Based Medicaid, and FDPIR programs, that association may qualify a student as an Extended Eligibility certification.
  - If the Case is **inactive**, the Active Programs section will indicate ‘No Open Programs’.

### Eligibility Source Record NOT linked to a Student

- If you locate an Eligibility Source that isn’t associated with a Student, make note of the Source ID Number.
  - Look up the Student and review any ‘Potential Matches’ listed in the center section on the Student detail page.

Potential Matches									
<b>Current Student</b>									
	Last	First	MI	DOB	Gender	School	Grade		
					M	DeSmet School	PK		
<b>Potential Matching Source(s)</b>									
Link	Invalid	Last	First	MI	DOB	Gender	City	Source	Confidence
						M	Missoula	<a href="#">5532951</a> (SNAP/TANF/MA)	82
						M	Billings	<a href="#">5685576</a> (SNAP/TANF/MA)	55
						M	Billings	<a href="#">5685575</a> (SNAP/TANF/MA)	55
						M	Twin Bridges	<a href="#">6214436</a> (SNAP/TANF/MA)	55

- You can link or invalidate any of the potential matches, as applicable, using the green plus or red minus icons.
- If the Potential Matching Source is *not* shown, click the **Magnifying Glass** on the upper-right corner to do an **Advance Search**. Enter the **Source ID** or desired search fields (from the eligibility source just located) and click ‘Search’.
- The Potential Eligibility Source should display. Click the ‘**Link**’ button to link the records together.
- If there are no potential matches for a student, there will be a message indicating such.