How to Directly Certify a Partial Match

Health and Nutrition Services
Arizona Department of Education

Disclaimer

This training was developed by the Arizona Department of Education (ADE) Health and Nutrition Services Division (HNS). The content in this training is intended for professionals operating one or more USDA Child Nutrition Programs in Arizona under the direction of ADE. The information in this training is subject to change. Attendees are encouraged to access professional development materials directly from the training library to prevent use of outdated content.

Intended Audience

This training is intended for **School Food Authorities (SFAs)** operating the **National School Lunch Program (NSLP).** All regulations are specific to operating the NSLP under the direction of ADE.

Objectives

At the end of this training, attendees should be able to:

- understand the requirement of Partial Matching;
- know how to compare Arizona Education Data Standards (AzEDS) data and other school-based student data with Department of Economic Services (DES) data to ensure accurate CNP Direct Certification matching; and,
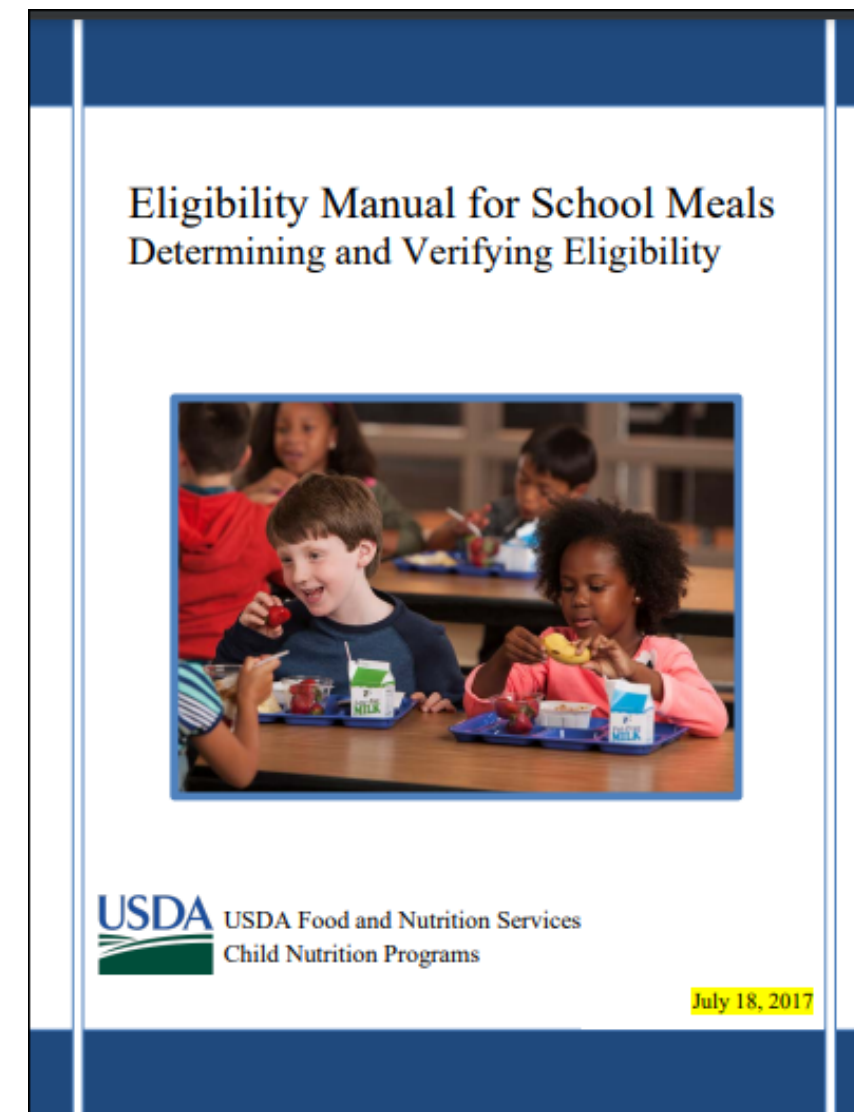- be comfortable selecting Match or No Match with the Partial Match link.

TRAINING HOURS

Information to include when documenting this training for Professional Standards:

Training Title: How to Directly Certify a Partial Match

Key Area: 3000 - Administration

Learning Code: 3120

Length: 30 minutes

Eligibility Manual for School Meals
Determining and Verifying Eligibility

USDA Food and Nutrition Services
Child Nutrition Programs

July 18, 2017

The instruction within this Online Course is based on guidance from USDA's Eligibility Manual For School Meals, 2017.

It is recommended to review the information from the other Step-by-Step Instructions on CNP Direct Certification for additional help with understanding how to use all search methods.

Quiz Time

Throughout this guide, there will be comprehension quiz questions to test your knowledge and help you apply what you're learning. Be sure to review these quiz questions and answers available within the guide.

The question mark icon below will indicate a comprehension quiz question.

Table of Contents

The following slides will only cover how-to instructions for State Match. Please refer back to the **Online Training Library** for other How-To Guides outlining other search methods in CNP Direct Certification.

Review CNP Direct Certification & School-Based Data

SECTION 1

DIRECT CERTIFICATION

Direct Certification is the process of determining which students are eligible for free or reduced-price meal benefits based on documentation obtained directly from the appropriate state or local agency. Students directly certified will automatically receive free meal benefits without submitting a household application.

CNP Direct Certification

ADE houses an online computer matching system called **CNP Direct Certification** which allows SFAs to directly obtain confirmation from such agencies to determine if their students will qualify for free meal benefits.

- SFAs can access this system at any time to generate documentation that may be used to certify students for free or reduced-price meal benefits without a household application within the current program year.

Arizona Education Data Standards (AzEDS)

ARIZONA EDUCATION DATA STANDARDS (AZEDS)

ADE's information system that maintains and reports student-level data for students attending a public educational institution in Arizona.

If your school does not report AzEDS data to ADE, the State Match method will not provide results and will show zero (0) students. This will be the result of all search methods using Student State IDs such as File Upload using Student State IDs and Individual Student Lookup using State Student IDs.

STATE STUDENT ID

ADE assigns each student with an AzEDS State Student ID (formerly known as SAIS ID) that acts as a student identifier from K-12th grade.

Student data is pulled from the pre-populated enrollment information in AzEDS. State Student IDs can be utilized to conduct direct certification only if the LEA uses AzEDS to send information to ADE.

Introduction to Partial Matching

SECTION 2

Partial Matching

Historically, only a student that had an exact match between Department of Economic Security (DES) data and AzEDS would be considered a Match. Any variation in a student's name or birthdate, including misspellings or typos in either system, would be identified as **No Match**.

With **Partial Matching**, the system uses the Levenschtein Algorithm to identify differences in names from both the student-based data and DES data. If a possible match is available, meaning there are small discrepancies between the two data sets, the search result will display a Partial Match link on the student record.

- For example, if a student's name was recognized as Jacob Villa in DES and the school- based data recognized the same student as Jacob Villa Long, CNP Direct Certification would report Jacob as a Partial Match.

First Name	Last Name	Birth Date	Result
Jody	Walker	04/15/2003	No Match
Johnathan	Tandoy	04/03/2013	Match
Matthew	Green	12/30/2014	No Match
Dimitri	Long-Guevaraso	05/17/1993	Partial Match
Jacob	Villa Long	04/18/2000	Partial Match
Julia	Gonzalos	06/01/2005	Match
George	Lane	10/30/1995	Match
Shane	Lane	02/08/2001	No Match
Cara	Cardena	09/10/2013	No Match
Lucas	Arellanos	01/22/2017	No Match

The *Partial Match* link will be shown in the "Results" column once the Direct Certification search has been conducted.

Please note that partial matching will be available in any search format including State Match, File Upload, and Individual Student Lookup.

Partial Matching

If the SFA can confirm that the partially-matched student is the individual shown in CNP Direct Certification, the user will certify him/her as a Match.

If the SFA confirms that the partially-matched student is not the individual described in CNP Direct Certification, the user will not certify the student and will declare him/her as a No Match.

Regardless if the student is identified as a Match or No Match, the user is required to review and accurately make a decision regarding the student's match status using the Partial Match confirmation.

Meal Benefits

All Partial Matches certified as a Match by the user will receive the same benefits as students reported back as a Match in CNP Direct Certification. This includes free meal benefits and the requirement to extend free meal benefits to household members for SNAP, TANF, and FDPIR matches.

Additionally, Partial Matches certified as a Match by the user will be entered in the SFA's Benefit Issuance Document (BID) as free, and the method of certification will be directly certified along with the category the child matched in.

Quiz Time

True or False: Partial Matches are a bonus to the CNP Direct Certification system and are not required to be certified throughout the year.

A **True**

B **False**

Quiz Time

True or False: Partial Matches are a bonus to the CNP Direct Certification system and are not required to be certified throughout the year.

A **True**

B **False**

False. Partial Matches are required to be determined as a part of the direct certification process. Failure to certify all Partial Matches could result in students not receiving their entitled free meal benefits.

How to Certify Partial Matches

Certifying Partial Matches

Each student result that is designated as a **Partial Match** will provide the user with the school-based record along with a DES record. The user should use the information populated from the Partial Match as well as reference their LEA records to determine if the student identified as a Partial Match is the same child who has a record in DES. The SFA should <u>not</u> contact the household to confirm.

The user should compare:
- the school-based record of first name, last name and birthdate with the DES record's first name, last name and birthdate;
- the DES record's address of the household receiving the benefit with the LEA's student address records; and,
- the DES record's of the *Primary Informant's (PI's) first and last name (*also known as the person who applied to benefits for the household) with the LEA's student records.

CNP Direct Certification

ACCESSING THE SYSTEM

Direct Certification using Medicaid Data is conducted in the CNP Direct Certification (CNPDC) web-based application in ADEConnect.

To access the CNPDC system, login to ADEConnect, select "View Applications," and then select "CNP Direct Certification / Direct Verification."

If CNP Direct Certification / Direct Verification is not a listed application in ADEConnect, you will need to request access from your Entity Administrator.

1 **LOGIN TO ADECONNECT**
Open a web browser, navigate to adeconnect.azed.gov, and input your username and password for ADEConnect.

2 **SELECT "VIEW APPLICATIONS"**
After logging in to ADEConnect, select "View Applications."
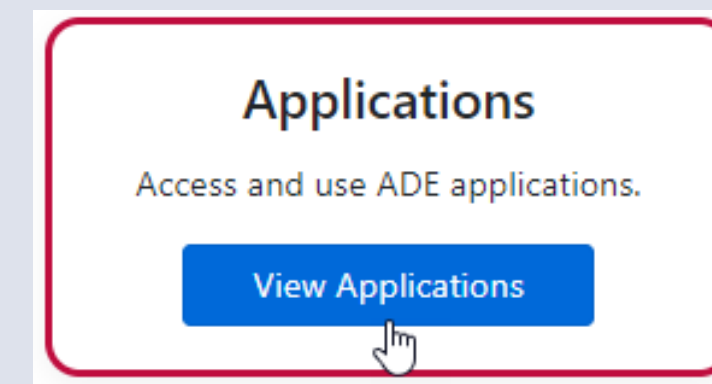
3 **SELECT "CNP DIRECT CERTIFICATION / DIRECT VERIFICATION"**
Select "CNP Direct Certification / Direct Verification" from the list of applications in ADEConnect.
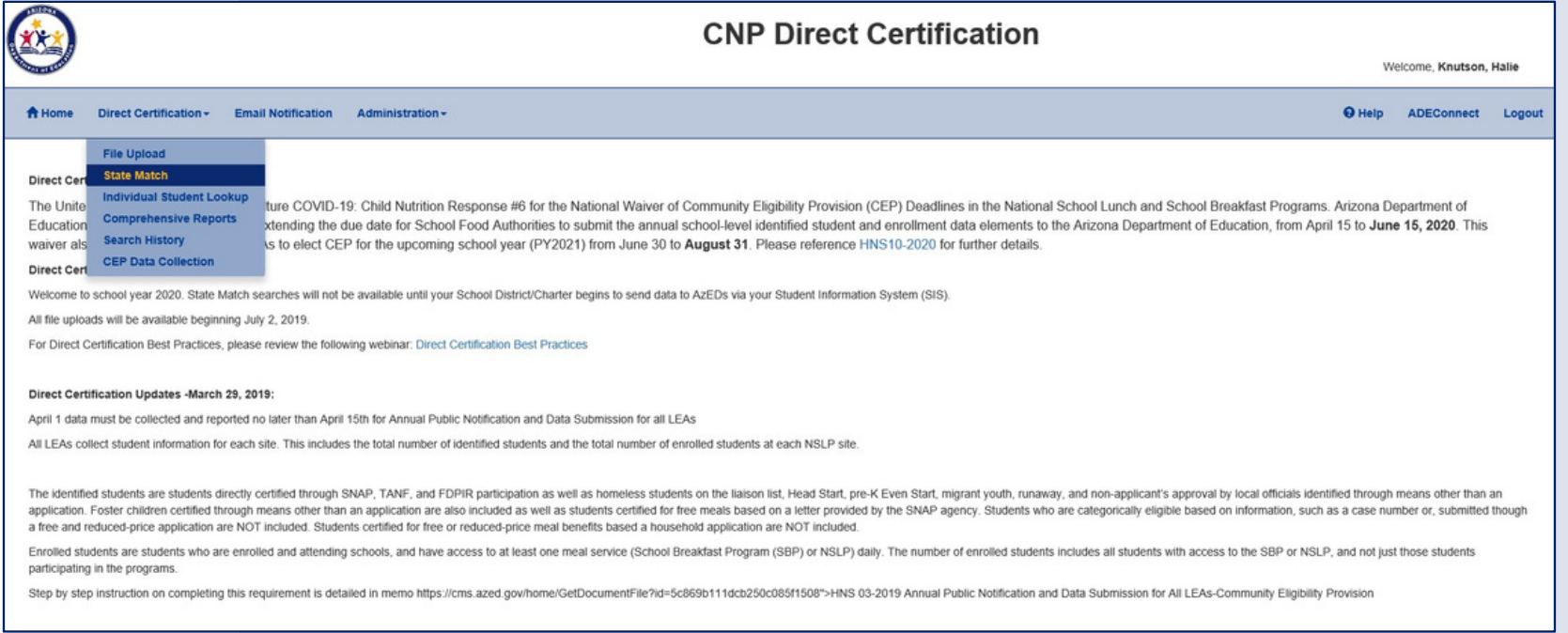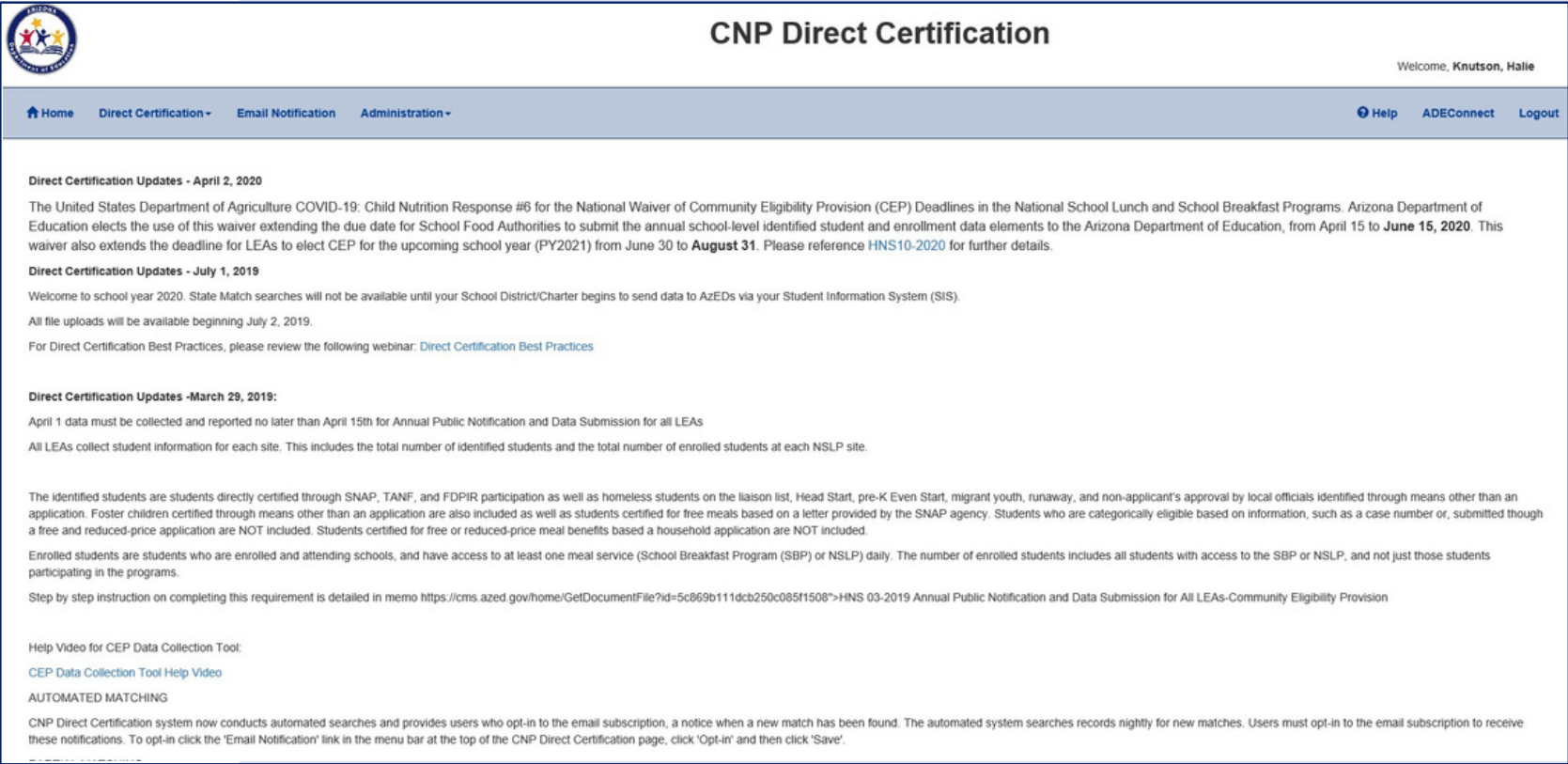
CNP Direct Certification / Direct Verification

CNP Direct Certification

ACCESSING THE SYSTEM

After successfully logging in to the CNP Direct Certification / Direct Verification System, a screen with a **Family Educational Rights and Privacy Act (FERPA) statement** will load. The statement must be read, understood, and acknowledged to advance in the system by selecting "**I AGREE/CONTINUE.**"

After the FERPA statement has been acknowledged, you will then be brought to a new screen where you must select CNP Direct Certification by clicking "**Proceed to Direct Certification.**"

Direct Certification State Match Search

After successfully logging in to the CNP Direct Certification / Direct Verification System and agreeing to the FERPA Compliance Statement, you will be directed to the **CNP Direct Certification portal**.

On the top blue bar, hover over the tab Direct Certification and select a search type in the drop-down menu. In this example, we will run a State Match.
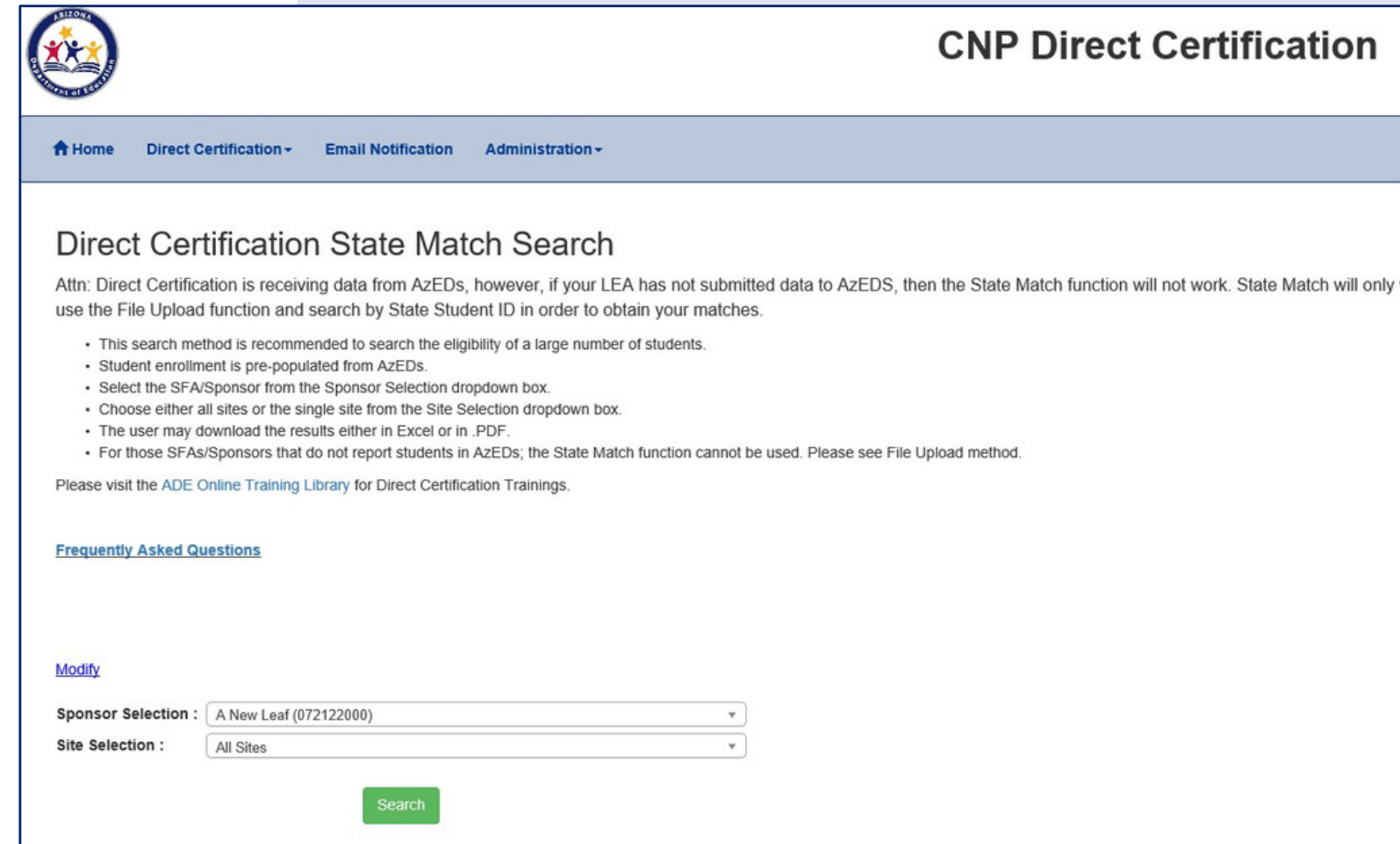
Please note that Partial Matching is available for all search options.

Direct Certification State Match Search

Once the "Direct Certification State Match Search" webpage loads, select your SFA from the **Sponsor Selection** dropdown. Next, in the Site Selection, click on All Sites.

Once the dropdown options are complete, select **Search**.

Search Results

Once the search has been conducted, the screen will refresh to this page that displays the search results.

In the table, find the header Partial Matches. In this example, there are 19 Partial Matches that will need to be certified as either Match or No Match.

Filtering the Results

Filter the results in the *Result* drop-down by selecting *Students* that *Partially* Match.

Now, only Partial Matches are listed in the Result column. The following slides will review how to certify a Partial Match as "Match" or "No Match."

To access the Partial Match data, click on the blue Partial Match link in the Result column.

Partial Match Records

After selecting a Partial Match, a screen with Partial Match AzEDS data and DES data will load. The student information located at the top will be AzEDS data and the information located below is DES data.

- AzEDS data (will provide the Student First Name, Student Last Name, and the Student Date of Birth (DOB).

- DES data will provide the First Name, Last Name, Student DOB, Address, PI First Name, PI Last Name, and Record Type. The Primary Informant (PI) is the person who applied for benefits for the household.

AZEDS DATA ——————→

DES DATA ——————→

Partial Match Records

Student First Name: Jacob   **Student Last Name:** VillaLong   **DOB:** 04/18/2000

First Name	Last Name	Student DOB	Address	PI First Name	PI Last Name	Record Type	Selected Match
Jacob	VILLA	4/18/2000	8425 E HEE BLVD AJO AZ 00871	NORA	Long	SNAP	○

Certifying a Partial Match

First, compare the AzEDS Student First Name with the DES First Name. Next, compare the AzEDS Student Last Name with the DES Last Name. Then, compare the AzEDS DOB and the DES Student DOB.

Once those items have been reviewed, next compare the DES Address, and the DES PI First and Last Name with information that your district has on file.

Compare all applicable data from all three data sets (AzEDS, DES, LEA) in depth before certifying any Partial Matches.

Partial Match Records

Student First Name: Jacob   Student Last Name: VillaLong   DOB: 04/18/2000

First Name	Last Name	Student DOB	Address	PI First Name	PI Last Name	Record Type	Selected Match
Jacob	VILLA	4/18/2000	8425 E HEE BLVD AJO AZ 00871	NORA	Long	SNAP	○

Partial Match Records

Student First Name: Jacob   Student Last Name: VillaLong   DOB: 04/18/2000

First Name	Last Name	Student DOB	Address	PI First Name	PI Last Name	Record Type	Selected Match
Jacob	VILLA	4/18/2000	8425 E HEE BLVD AJO AZ 00871	NORA	Long	SNAP	○

Data Comparison

EXAMPLE

AzEDS Data		DES Data	LEA Data
First Name	Jacob	Jacob	
Last Name	VillaLong	Villa	
Date of Birth	4/18/2000	4/18/2000	
Address	N/A	8425 E HeeBlvd Ajo, AZ, 00871	Dependent on student data at the LEA level.
PI First Name	N/A	Nora	
PI Last Name	N/A	Long	

Partial Match Records

Student First Name: Jacob   Student Last Name: VillaLong   DOB: 04/18/2000

First Name	Last Name	Student DOB	Address	PI First Name	PI Last Name	Record Type	Selected Match
Jacob	VILLA	4/18/2000	8425 E HEE BLVD AJO AZ 00871	NORA	Long	SNAP	○

Partial Match Records

Student First Name: Jacob   Student Last Name: VillaLong   DOB: 04/18/2000

First Name	Last Name	Student DOB	Address	PI First Name	PI Last Name	Record Type	Selected Match
Jacob	VILLA	4/18/2000	8425 E HEE BLVD AJO AZ 00871	NORA	Long	SNAP	○

Discretion of the User

There is no set criteria when certifying a Partial Match as a Match in CNP Direct Certification.

- Determinations are a case-by-case basis for each Partial Match.

- It is up to the user's discretion based on AzEDS, DES, and LEA records if the student is a Match or No Match.

For example, a student may match by name and birthdate, but not address. A Partial Match with this scenario may be a Match based on other records; however, another Partial Match may be a No Match even with the same criteria.

It is important to only certify a Partial Match as a Match based on the student-level data and confidence in the user's matching evaluation. If the Partial Match cannot be confirmed as a Match, it is important to declare the student as a No Match.

Selecting the Match Option

To confirm this student as a Match due to the evaluation of all data and records, select the circle under the header Selected Match and click Update Match Result.

Your screen will now display the updated Search Results and the Partially Matched student will now show as a Match in the Result column.

Partial Match Records

Student First Name: Jacob   Student Last Name: VillaLong   DOB: 04/18/2000

First Name	Last Name	Student DOB	Address	PI First Name	PI Last Name	Record Type	Selected Match
Jacob	VILLA	4/18/2000	8425 E HEE BLVD AJO AZ 00871	NORA	Long	SNAP	●
						No Eligible Match	○

Update Match Result   Cancel

First Name	Last Name	Birth Date	Result	Decision Date	Eligibility Type
Dimitri	Long-Guevaraso	05/17/1993	Partial Match		
Jacob	Villa Long	04/18/2000	Match	02/06/2018	SNAP
Randy	Juan	07/16/2009	Partial Match		
Christopher	Gilramcin	02/28/2003	Partial Match		
Johnathan	Garcia	01/06/2018	Partial Match		
Ashley	Montes	06/06/1992	Partial Match		
Randy	Aguilar Delgado	09/03/2014	Partial Match		
Andrea	Alta Louiscourt	01/19/2007	Partial Match		
Brian	Mariscal Smith	11/20/1995	Partial Match		
Walter	Jones Lucatero	12/25/2003	Partial Match		

Quiz Time

True or False: Once the user updates the match result, the match is saved either as a Match or No Match depending on the partial match determination. The user does not have to click save to save the result.

A **True**

B **False**

Quiz Time

True or False: Once the user updates the match result, the match is saved either as a Match or No Match depending on the partial match determination. The user does not have to click save to save the result.

A True

B False

True. There is not a save button when certifying partial matches. The student will either be displayed as a Match or No Match in CNP Direct Certification records once the user updates the match result.

Updating a Partial Match Result

Incorrect Determination

If a student was incorrectly certified as a Match, this can be corrected at any time by clicking on the Match link.

By clicking on the Match link, the original Partial Match Records will display on your screen.

To change the determination, select the No Eligible Match circle, and then click Update Match Result.

Once this is completed, the student will show as No Match in the Result column.

First Name	Last Name	Birth Date	Result	Decision Date	Eligibility Type
Dimitri	Long-Guevaraso	05/17/1993	Partial Match		
Jacob	Villa Long	04/18/2000	Match	02/06/2018	SNAP
Randy	Juan	07/16/2009	Partial Match		

Partial Match Records

Student First Name: Jacob   **Student Last Name:** VillaLong   **DOB:** 04/18/2000
Date Modified: 3/20/2018 11:03:13 AM

First Name	Last Name	Student DOB	Address	PI First Name	PI Last Name	Record Type	Selected Match
Jacob	VILLA	4/18/2000	8425 E HEE BLVD AJO AZ 00871	NORA	Long	SNAP	○
						No Eligible Match	●

Update Match Result   Cancel

First Name	Last Name	Birth Date	Result
Dimitri	Long-Guevaraso	05/17/1993	Partial Match
Jacob	Villa Long	04/18/2000	No Match
Randy	Juan	07/16/2009	Partial Match

Multiple DES Records

SECTION 5

Multiple DES Records

In some situations more than one set of records from DES may appear in the Partial Match Records box.

For example, in the screenshot to the right there are two Partial Match options displayed for Christopher Garcia. In this situation, if this student was a Match, it is best practice to select the particular match with the most accurate or detailed student information.

Partial Match Records

Student First Name: Christopher   **Student Last Name:** Gilramcin   **DOB:** 02/28/2003
Date Modified: 3/20/2018 12:52:16 PM

First Name	Last Name	Student DOB	Address	PI First Name	PI Last Name	Record Type	Selected Match
CHRISTOPHER	GARCIA	2/28/2003				SNAP	○
CHRISTOPHER	GARCIA	2/28/2003	7662 W VARGASLUCAS RD PHOENIX AZ 01017	Marjorie	GARCIA	SNAP	○
					No Eligible Match		●

Update Match Result   Cancel

CONTACT US

If you have a question or require additional assistance, please contact your assigned specialist or contact HNS.

📞 602-542-8700

✉ ContactHNS@azed.gov

🌐 www.azed.gov/hns

Congratulations

You have completed the Online Course:
How to Conduct Direct Certification Using State Match

Information to include when documenting this training for Professional Standards:

Training Title:
How to Directly Certify a Partial Match

Key Area: 3000 - Administration

Learning Code: 3120

Length: 30 minutes

Please note, attendees must document the amount of training hours indicated on the training despite the amount of time it takes to complete it.

Certificate

Requesting a training certificate
Please click the button to complete a brief survey about this online training. Once the survey is complete, you will be able to print your certificate of completion from Survey Monkey.

TAKE SURVEY

Information to include when documenting this training for Professional Standards:

Training Title:
How to Directly Certify a Partial Match

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Please note, attendees must document the amount of training hours indicated on the training despite the amount of time it takes to complete it.

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Mail: U.S. Department of Agriculture Office of the Assistant Secretary for Civil Rights 1400 Independence Avenue, SW Washington, D.C. 20250-9410; or

Fax: (833) 256-1665 or (202) 690-7442; or

Email: program.intake@usda.gov

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