



Public Schools of North Carolina

# **Unique Identifier for Staff (Staff UID)**

## **For LINQ NC Desktop Application Users**

# Staff UID System Overview

---

- The Unique Identifier for Staff System (Staff UID) 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.
- UIDs for K-12 staff members is a key component of providing access to various State and local IT applications, such as the NCEdCloud IAM Service.
- Staff UID is built on the eScholar Uniq-ID® for Staff product.



# Staff UID – 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 Staff UID 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 the school district or charter school.*
- **94 - 100 = Match**
  - If the system finds an exact matching staff record, it will assign a new Staff ID.



# Staff UID – Key Terms

---

## Exact Match Rule

A new staff record loaded into Staff UID 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 UIDs into the payroll source system will result in more exact matches and few near matches.

## Batch File

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



# Fields Used by the UID Matching Engine

## Match Rules for Staff UID



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.





# Navigating Staff UID – 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.



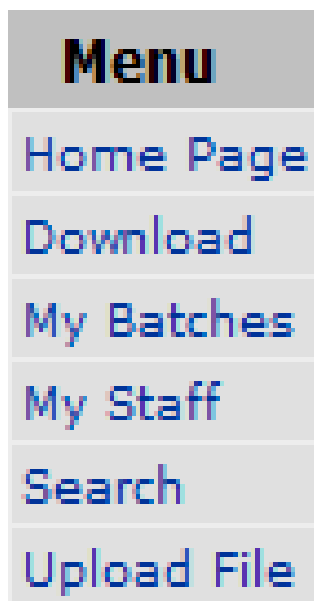
My Batches Currently Processing 			
Batch Number	Date Uploaded	Batch Status	
<a href="#">159</a>	05/15/2009	DATA ERRORS PENDING	
<a href="#">Show me all my batches</a>			

Find A Batch 	
<input type="text"/>	<input type="button" value="Find"/>

Batches Pending - Fix Errors 			
Batch Number	Date Uploaded	Batch Status	
<a href="#">159</a>	05/15/2009	DATA ERRORS PENDING	
<a href="#">Show me all batches pending with errors</a>			

Batches Pending - Near Matches 			
Batch Number	Date Uploaded	Batch Status	
<a href="#">84</a>	05/04/2009	NEAR MATCHES PENDING	
<a href="#">Show me all batches pending match resolution</a>			

# Navigating Staff UID – Menu Bar






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



# Navigating Staff UID – Icons

- Staff UID uses 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 Staff UID 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 Staff UID system can be sorted by clicking on the applicable column header.





# Navigating Staff UID – 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.

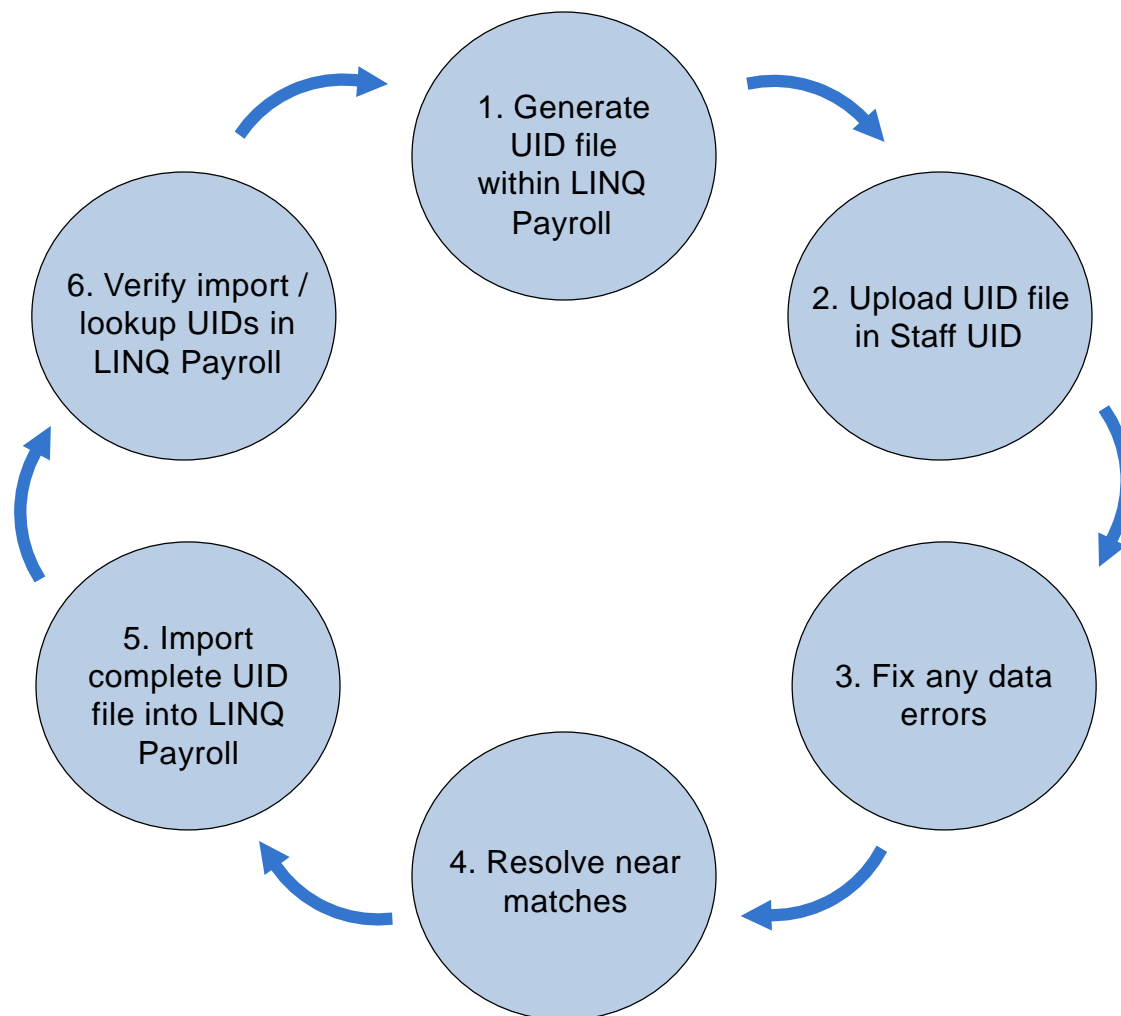
Find a Batch

26

Batch Number	Upload Date	Batch Status	Number Of Records	
<a href="#">26</a>	08/06/2008	DATA ERRORS PENDING	5	

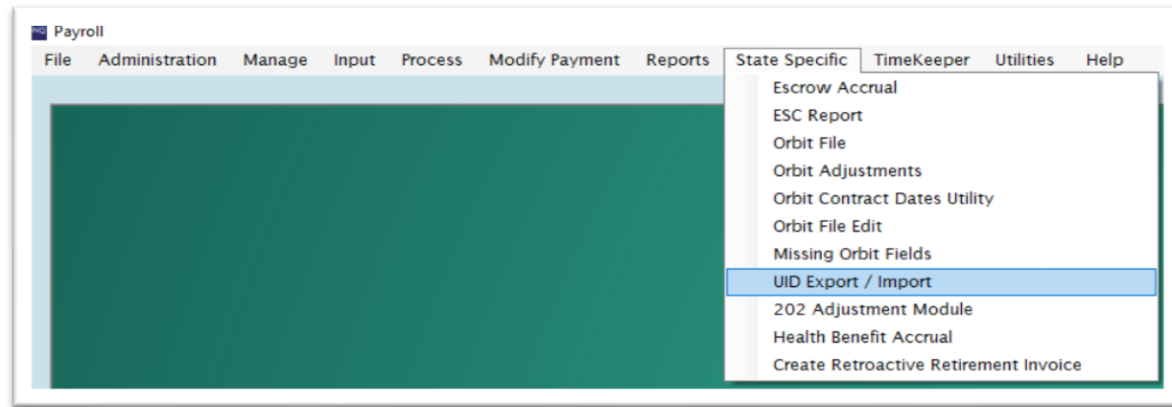
- To work on a particular batch, click the  icon in the right-most column.

# Staff UID Assignment Process Overview




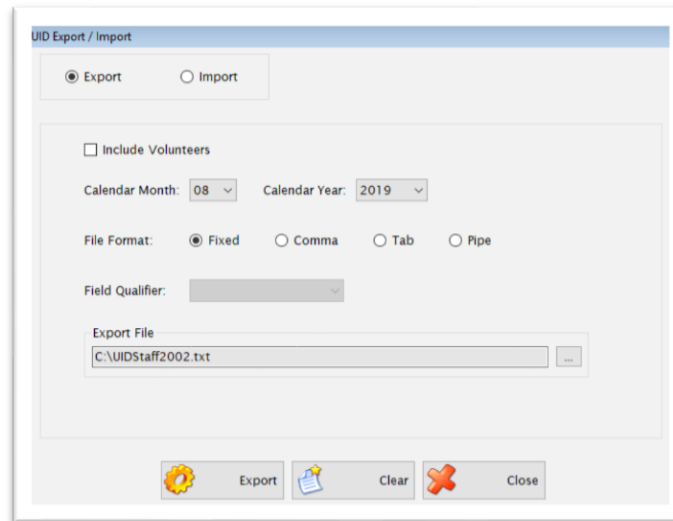
# Staff UID Process Step 1: Generate UID File in LINQ Desktop Application

- LEA/Charter generates the Staff UID file from their payroll system, from within the LINQ v6 application.
- To create the Staff UID file, perform the following steps:
  - Sign on to Payroll
  - Select State Specific
  - Select UID Export/Import



# Staff UID Process Step 1: Generate UID File in LINQ Desktop Application

- Select the Export radio button
- Select the CALENDAR month and CALENDAR Year that you wish to create a file for.
- Select Fixed for the File Format
- The Field Qualifier field should remain blank.
- Click  to browse to a folder location where you want the file saved then click the Export button
- The Staff UID file is named UIDStaffYYPP.txt, where YY=Calendar year and PP=Calendar month

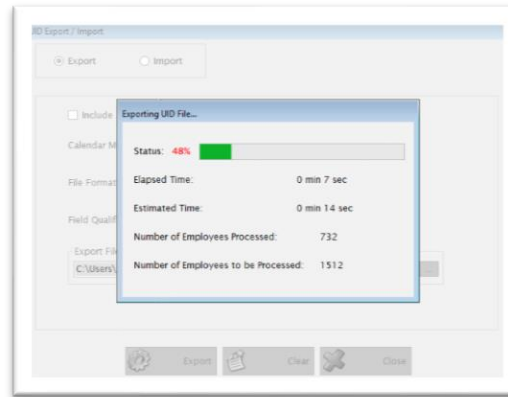


The screenshot shows the 'UID Export / Import' dialog box. The 'Export' radio button is selected. The 'Include Volunteers' checkbox is unchecked. The 'Calendar Month' dropdown is set to '08' and the 'Calendar Year' dropdown is set to '2019'. The 'File Format' section has 'Fixed' selected. The 'Field Qualifier' dropdown is empty. The 'Export File' text box contains 'C:\UIDStaff2002.txt' and has a browse button to its right. At the bottom, there are four buttons: 'Export' (with a gear icon), 'Clear' (with a document icon), 'Close' (with a red X icon), and an unlabeled button.

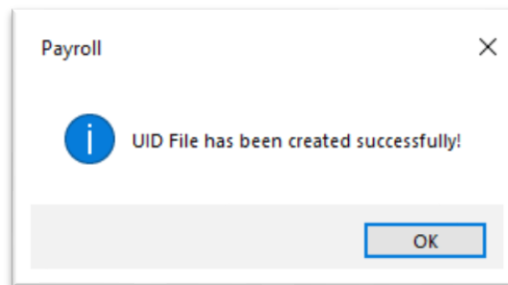


# Staff UID Process Step 1: Generate UID File in LINQ Desktop Application

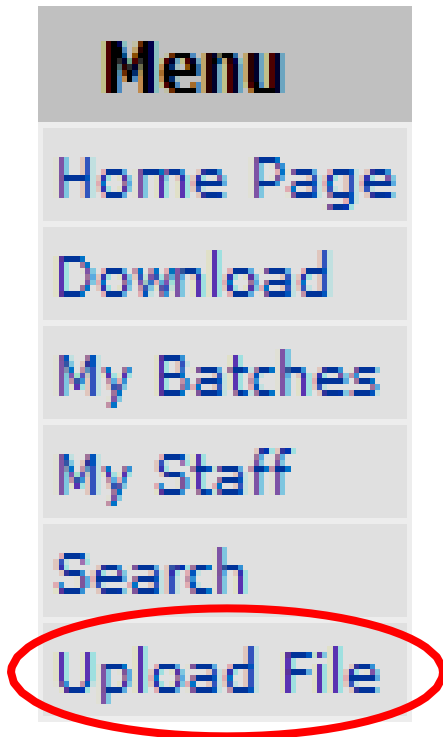
When the data begins exporting, a status bar will appear.



Once the export is complete, the message box below will appear.



## Staff UID Process Step 2: Upload UID File in Staff UID



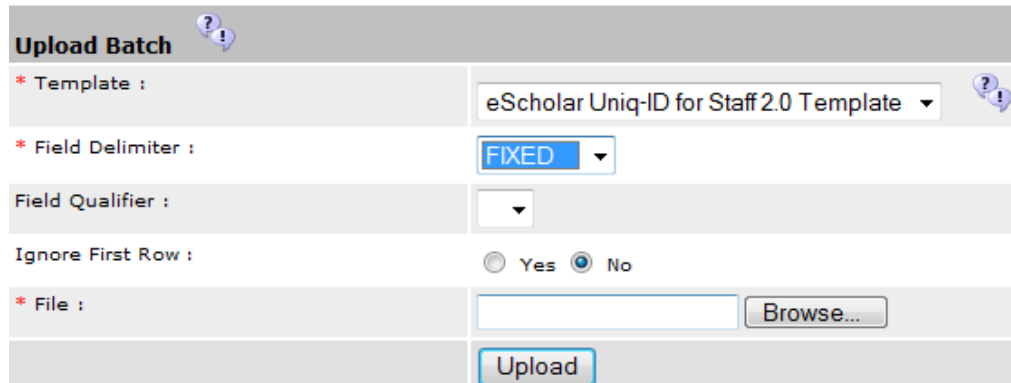
- Log in to Staff UID.
- Click the **Upload File** link from the Menu Bar.
- This module will allow users to upload their Staff UID batch files which were exported from the LINQ Payroll system.



# Staff UID Process Step 2: Upload UID File in Staff UID

To upload a UID file, perform the following steps in the Staff UID system:

1. Click on the **Upload File** link under Menu.
2. The system will display the following **Upload Batch** page.



The screenshot shows the 'Upload Batch' page with the following fields and options:

- Template :** eScholar Uniq-ID for Staff 2.0 Template
- Field Delimiter :** FIXED
- Field Qualifier :** (empty dropdown)
- Ignore First Row :** Yes (radio button), No (radio button, selected)
- File :** (empty text box) with a 'Browse...' button
- Upload** button

3. Fill in the options as they are displayed on this screen shot for the first four values.
4. Click the **Browse** button and navigate to the saved UID batch file that was exported from the LINQ Payroll system.
5. Click the **Upload** Button.



# Staff UID Process Step 2: Upload UID File in Staff UID

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.

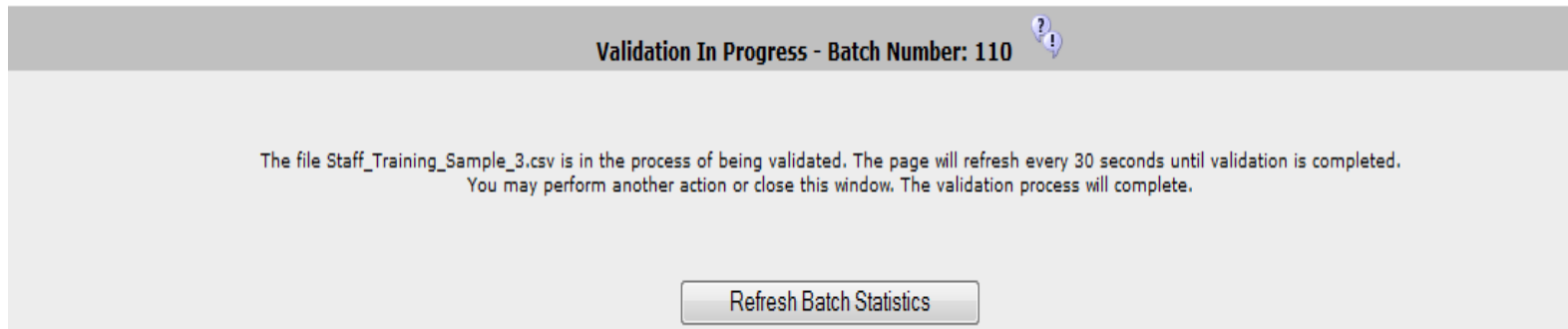
5. After a file is uploaded successfully, the data within the file will be validated. Some examples of data validation include making sure each record has the correct number of fields, a date of birth, a gender, etc.





## Staff UID Process Step 2: Upload UID File in Staff UID

5. To start the Validation Process, click the Validate button or wait and the system will begin the Validation automatically.
6. 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.



# Staff UID Process Step 2: Upload UID File in Staff UID

---

## Possible Validation Outcomes

After data validation is complete, the system will identify if any errors exist in the batch file, and one of three outcomes will be reported:

- **Fatal File Errors:**
  - The file contained one or more *fatal file errors* and could not be processed.
- **Invalid Data Errors:**
  - The file contained one or more *data errors*.
- **No Data Errors:**
  - The file contained no data errors and the user can start ID assignment.



# Staff UID Process Step 3: Fix Data Errors

## Fatal File Errors

The batch file will be rejected if a fatal error is found. Causes of a fatal error 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	

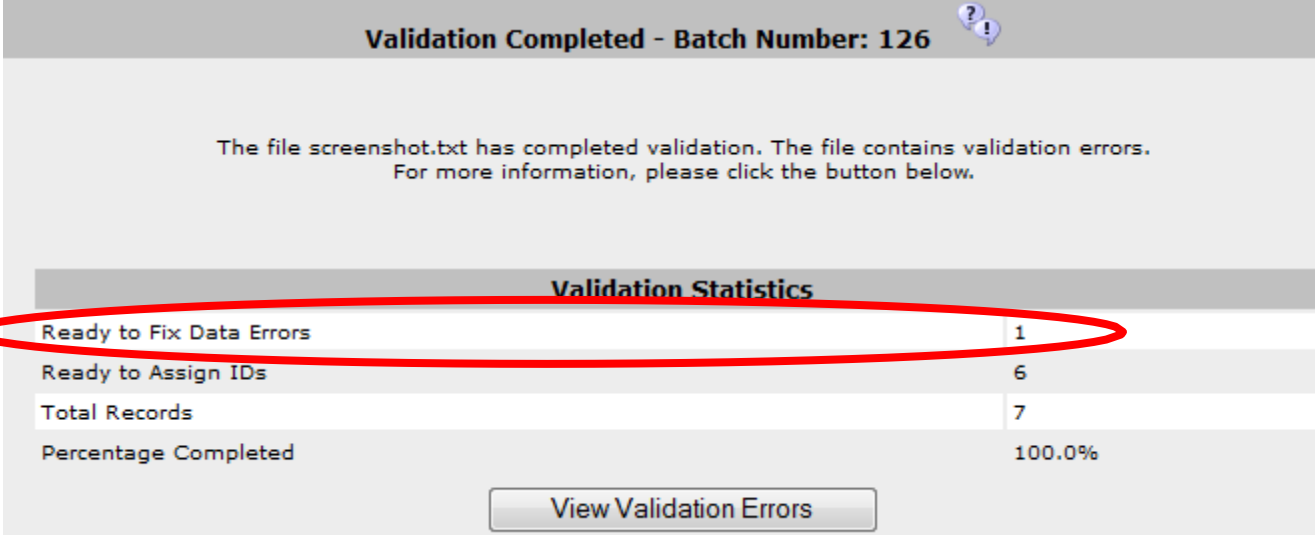
If the file contains a fatal error, then the batch will not be loaded into the Staff UID system.



# Staff UID Process Step 3: Fix Data Errors

## Invalid Data Errors

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



**Validation Completed - Batch Number: 126** ?!

The file screenshot.txt has completed validation. The file contains validation errors.  
For more information, please click the button below.

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

[View Validation Errors](#)

**Note:** Data errors should be fixed in LINQ Payroll. After the errors are fixed in LINQ Payroll, users will need to complete Step 1 again then upload the new batch file to the Staff UID system.



# Staff UID Process Step 3: Fix Data Errors


To create an “Errors to Fix” report of records that need to be corrected in the LINQ 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:

<a href="#">Batch Number</a>	<a href="#">Upload Date</a>	<a href="#">Batch Status</a>	<a href="#">Number Of Records</a>	
<a href="#">397</a>	05/25/2009	DATA ERRORS PENDING	3	

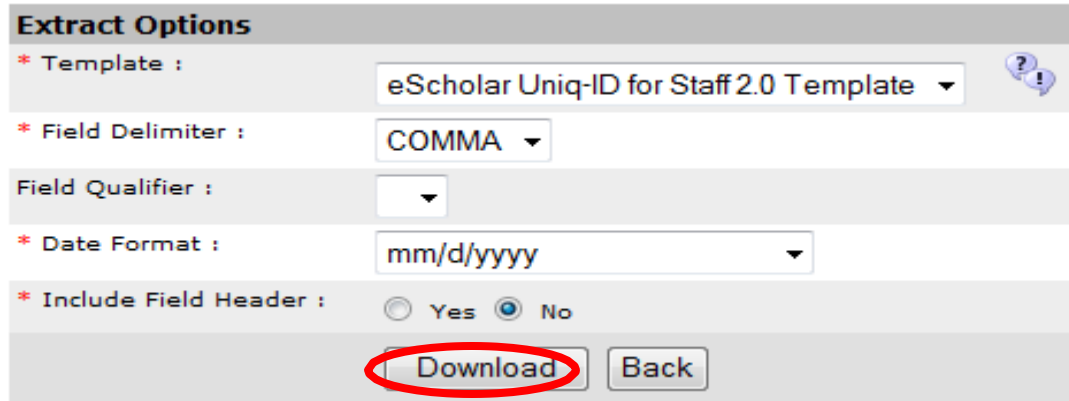
Displaying 1 to 1 of 1

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.



# Staff UID Process Step 3: Fix Data Errors

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



The screenshot shows the 'Extract Options' form. It includes fields for Template, Field Delimiter, Field Qualifier, Date Format, and Include Field Header. The 'Download' button is circled in red.

**Extract Options**

\* Template : eScholar Uniq-ID for Staff 2.0 Template

\* Field Delimiter : COMMA

Field Qualifier :

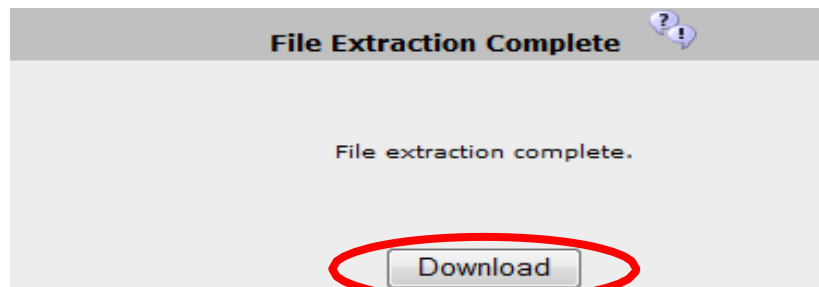
\* Date Format : mm/d/yyyy

\* 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.



The screenshot shows a 'File Extraction Complete' message box. The 'Download' button is circled in red.

**File Extraction Complete**

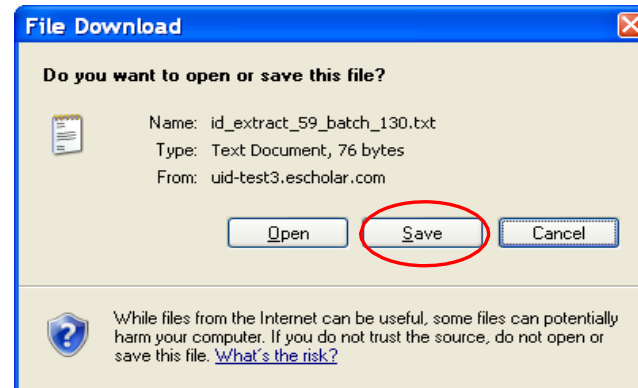
File extraction complete.

**Download**



# Staff UID Process Step 3: Fix Data Errors

- 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.



- 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.;


- Correct the staff data errors in LINQ Payroll then complete Steps 1 and 2 again.

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



# Staff UID Process Step 3: Fix Data Errors

If data errors still exist after loading the new batch file into the Staff UID system, 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

<a href="#">District Code</a>	<a href="#">School Code</a>	<a href="#">Last Name</a>	<a href="#">First Name</a>	
<input type="checkbox"/> 310 - Duplin County	304 - Mock School	Appel	Ken	

Displaying 1 to 1 of 1





FirstPrevNextLast

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



# Staff UID Process Step 3: Fix Data Errors

- 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 	
<b>General Information</b>	
* 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"/>
<b>Personal Information</b>	
* 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"/> - <input type="text"/> - <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"/>

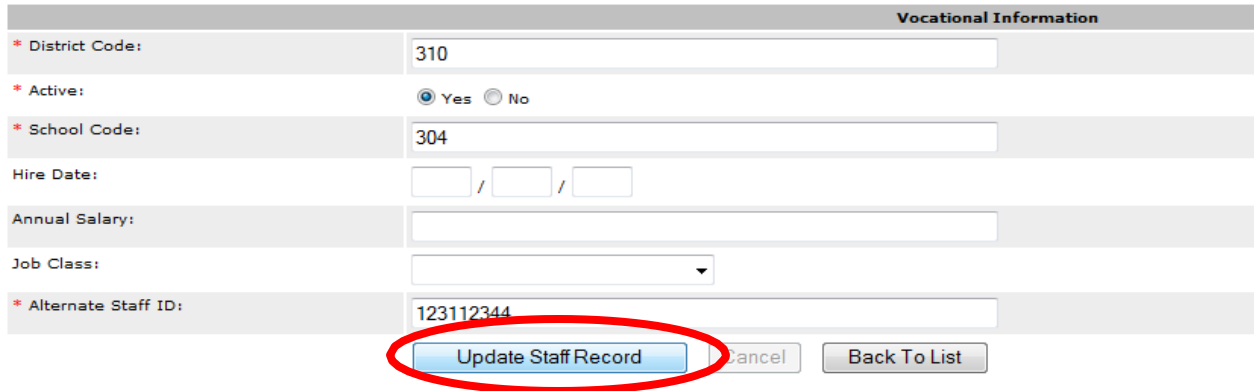
- Correct all data errors on the page.



# Staff UID Process Step 3: Fix Data Errors

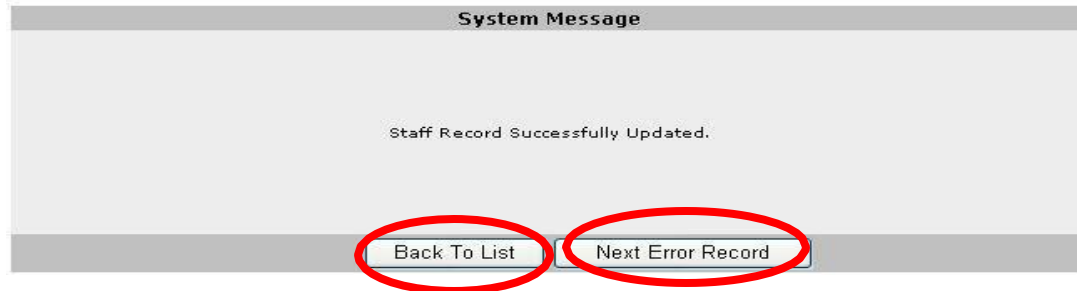
6. After all data errors are corrected, select the **Update Staff Record** button.

\*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". It contains several fields: "District Code" with value 310, "Active" with radio buttons for "Yes" (selected) and "No", "School Code" with value 304, "Hire Date" with a date picker, "Annual Salary" with an empty text box, "Job Class" with a dropdown menu, and "Alternate Staff ID" with value 123112344. At the bottom, there are three buttons: "Update Staff Record" (circled in red), "Cancel", and "Back To List".

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



The screenshot shows a "System Message" dialog box. It contains a single line of text: "Staff Record Successfully Updated." At the bottom, there are two buttons: "Back To List" (circled in red) and "Next Error Record" (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**.



# Staff UID Process Step 3: Fix Data Errors

## No Data Errors

If no data errors are found, or once all data errors have been corrected, click Start ID Assignment to initiate the process of generating and assigning UIDs to the records included in the batch file.

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

# Staff UID Process Step 4: Near Match Resolution

2. During ID Assignment, 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.
3. An Assignment Completed page will be displayed after the assignment process is complete.

**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



# Staff UID Process Step 4: Near Match Resolution

If there are any near matches identified during the ID Assignment process, the following steps can be followed to resolve them:

- 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	
<input type="checkbox"/> 310 - Duplin County	304 - Mock School	Connel	Jeff	
<input type="checkbox"/> 310 - Duplin County	308 - Mock School	Gordon	Jeffrey	

displaying 1 to 2 of 2

First

Prev

Next

Last

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

# Staff UID Process Step 4: Near Match Resolution

4. 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 Staff UID System.

<b>Resolve Match for Staff Member : 406044</b>			
<b>Submission Record</b>			
First Name: Megan	Middle Name: B	Last Name: Phillips	Suffix: Jr
Gender: Female	Date Of Birth: 08/17/1990	Ethnicity: White (Not Hispanic)	SSN: #####
<input type="button" value="Create New"/> <input type="button" value="Cancel"/> <input type="button" value="Back To Batch Details"/>			
<b>Potential Match (Staff Id: 2533525669 - Probability: 88.0% )</b>			
First Name: Megan	Middle Name:	Last Name: Winchester	Suffix:
Gender: Female	Date Of Birth: 08/17/1990	Ethnicity: White (Not Hispanic)	SSN: #####
<input type="button" value="Compare"/>			

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



# Staff UID Process Step 4: Near Match Resolution

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

Near Match Details.		Potential Match: 2533525669 ( <a href="#">View Staff Profile</a> )	
<b>General Information</b>			
Staff ID:		2533525669	
First Name:	Megan	Megan	
Middle Name:	B		
Last Name:	Phillips	Winchester	
Suffix:	Jr		
Full Name:			
Previous Last Name:	Winchester		
<b>Personal Information</b>			
Gender:	Female	Female	
Date Of Birth:	08/17/1990	08/17/1990	
SSN:	#####	#####	
Ethnic Code:	White (Not Hispanic)	White (Not Hispanic)	
Ethnicity Subgroup:			
Highest Degree Earned:			
Address1:			
Address2:			
City:			
State:			
Zip Code:			
<b>Vocational Information</b>			
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"/>			

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



# Staff UID Process Step 6 - Resolve Near Matches

- To view more information about the Potential Match record, click the **View Staff Profile** link.

Near Match Details.			
Submission Record: 4101642		Potential Match: 7214526255	<a href="#">View Staff Profile</a>
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 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. The page displays two staff records. The first record is for "06B Crossnore Academy - 000 Crossnore Academy" and includes fields for Job Class, Hire Date (11/22/2010), Annual Salary (\$\$\$\$\$\$\$), Alternate Staff ID (33628), Active status (Yes), and Last Update Date (12/17/2010). The second record is for "880 Transylvania County Schools - 880 Locally Assigned" and includes fields for Job Class, Hire Date (08/22/2007), Annual Salary (\$\$\$\$\$\$\$), Alternate Staff ID (3628), Active status (No), and Last Update Date (06/29/2009). The browser's status bar at the bottom shows "Done" and "Internet".





# Staff UID Process Step 4: Near Match Resolution

---

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

**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 member.

**Create New:** If no staff matches the submission staff record, create a new Staff ID.



# Staff UID Process Step 4: Near Match Resolution

## Assign ID

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
<div><div>Assign ID</div><div>Cancel</div><div>Back</div></div>		



# Staff UID Process Step 4: Near Match Resolution

## Create New ID

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:

- Click the **BACK** button on the bottom of the **Near Match Comparison** page. The system will display the Resolve Near Match Summary page.
- 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



# Staff UID Process Step 5 – Import Staff UID file into LINQ

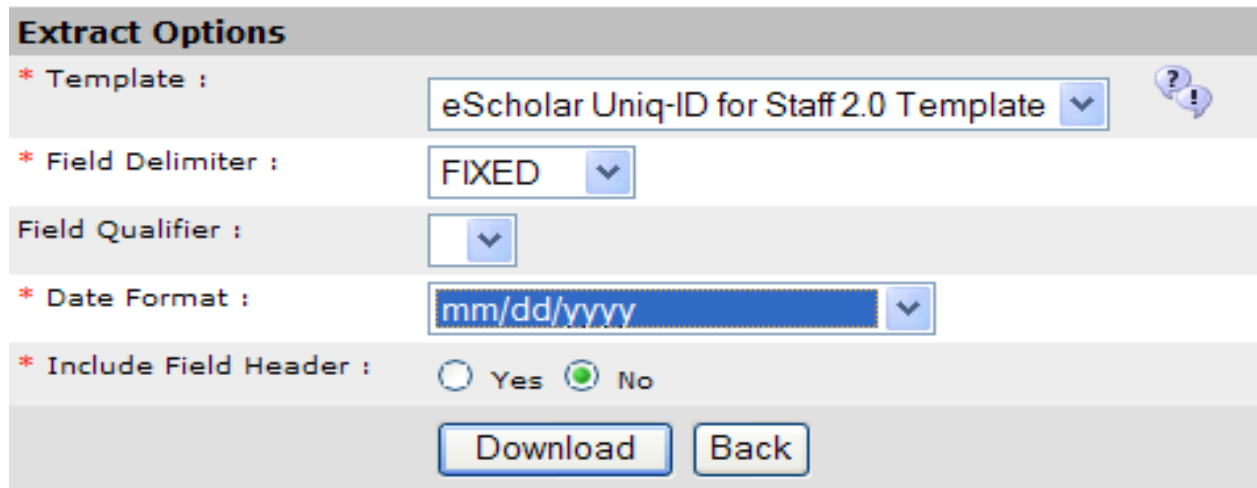
After the all data errors have been fixed, all near matches have been resolved and the ID assignment process has completed, Staff IDs can be downloaded. To download Staff IDs, perform the following steps:

1. Click the 'Download IDs' button.



# Staff UID Process Step 5 – Import Staff UID file into LINQ

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



The screenshot shows a web form titled "Extract Options" with the following fields and controls:

- \* Template :** A dropdown menu set to "eScholar Uniq-ID for Staff 2.0 Template". A help icon (question mark in a speech bubble) is to the right.
- \* Field Delimiter :** A dropdown menu set to "FIXED".
- Field Qualifier :** A dropdown menu with an empty selection.
- \* Date Format :** A dropdown menu set to "mm/dd/yyyy".
- \* Include Field Header :** Radio buttons for "Yes" and "No". The "No" option is selected.
- Buttons:** "Download" and "Back" buttons are at the bottom.

4. Click the **Download** button.

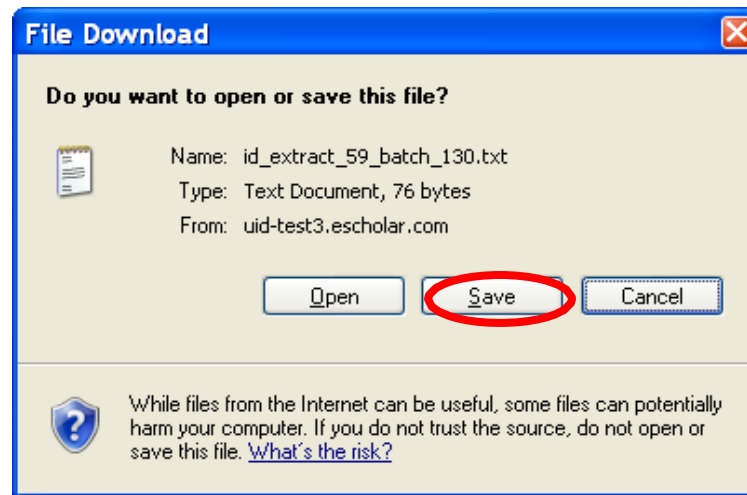


# Staff UID Process Step 5 – Import Staff UID file into LINQ

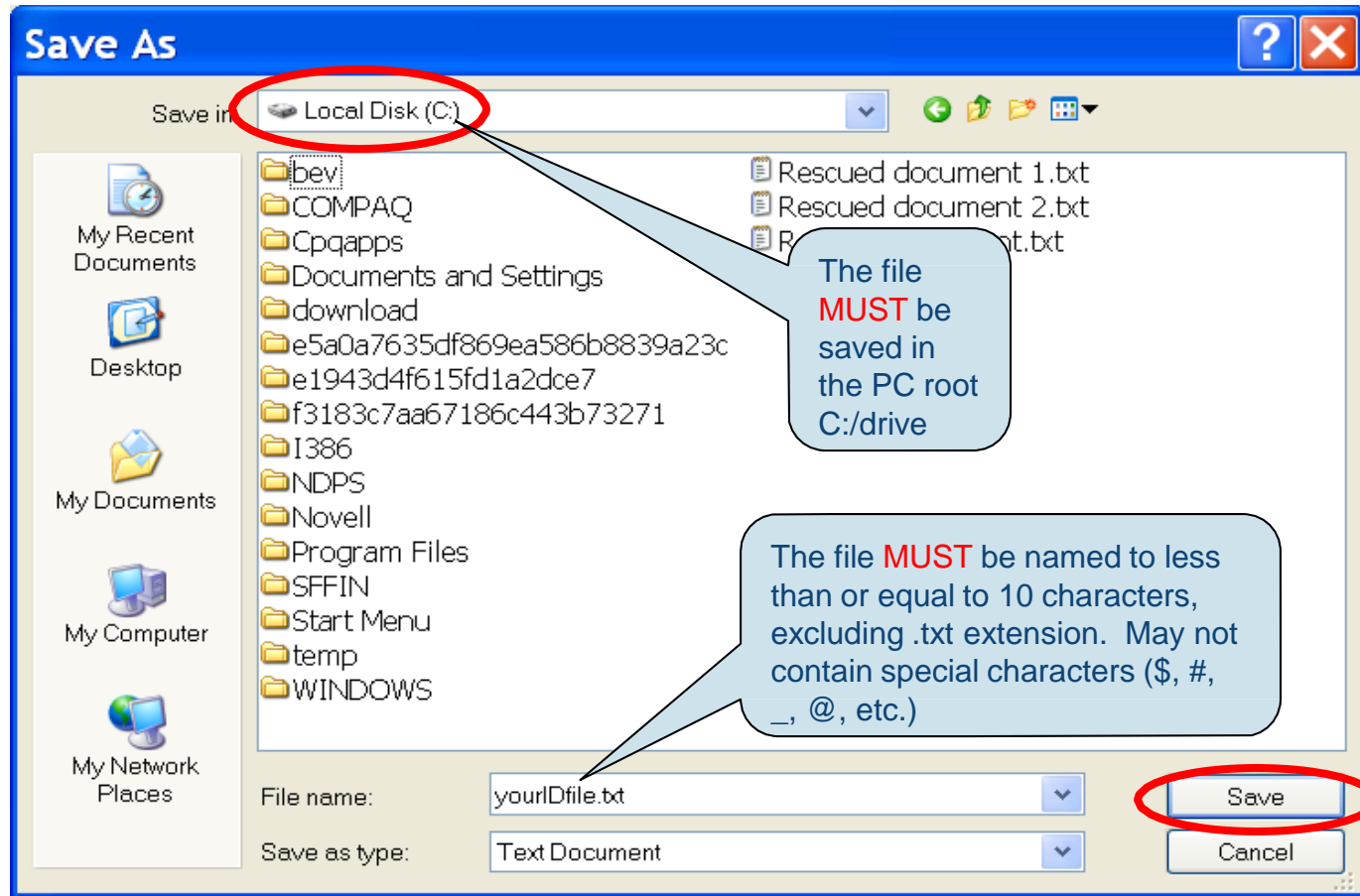
5. The system will briefly display a status message page and then a File Extraction complete notice. Click the Download button



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



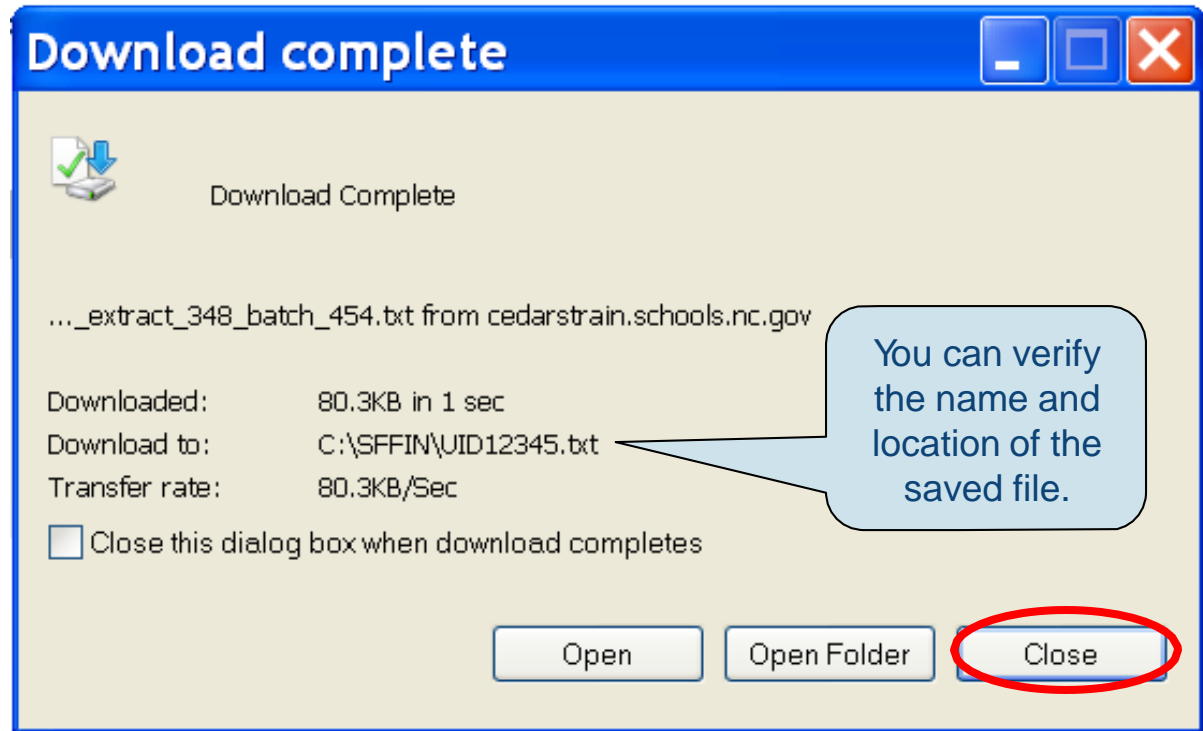
# Staff UID Process Step 5 – Import Staff UID file into LINQ



- Save the downloaded batch file of assigned Staff IDs anywhere on the PC it is accessible via the Windows “Browse for File” dialog.



# Staff UID Process Step 5 – Import Staff UID file into LINQ



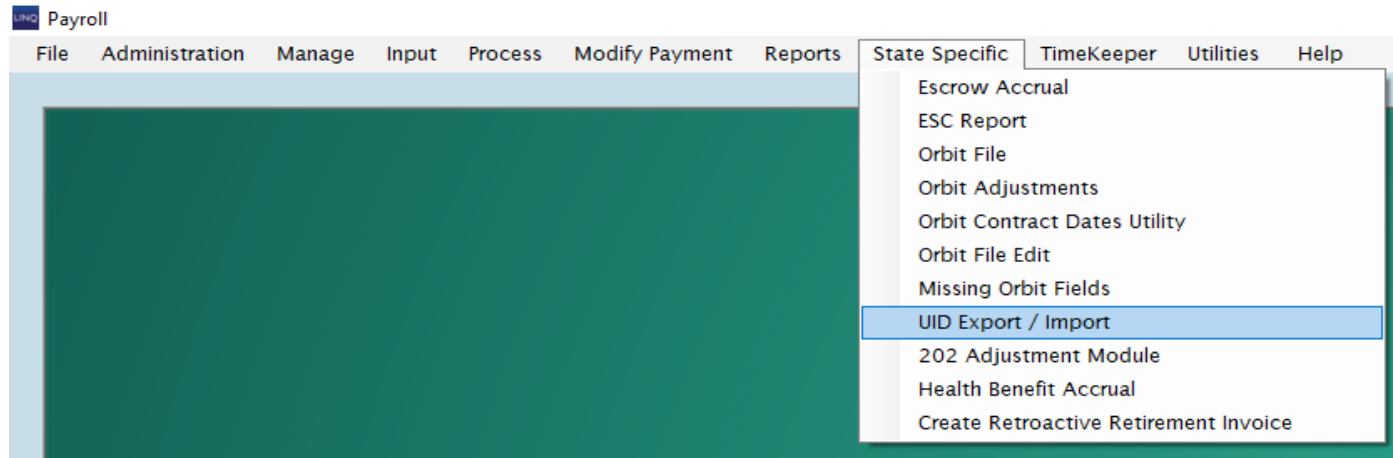
- Click the Close button.
- Return to the application home page by clicking the Home Page link in the Menu.





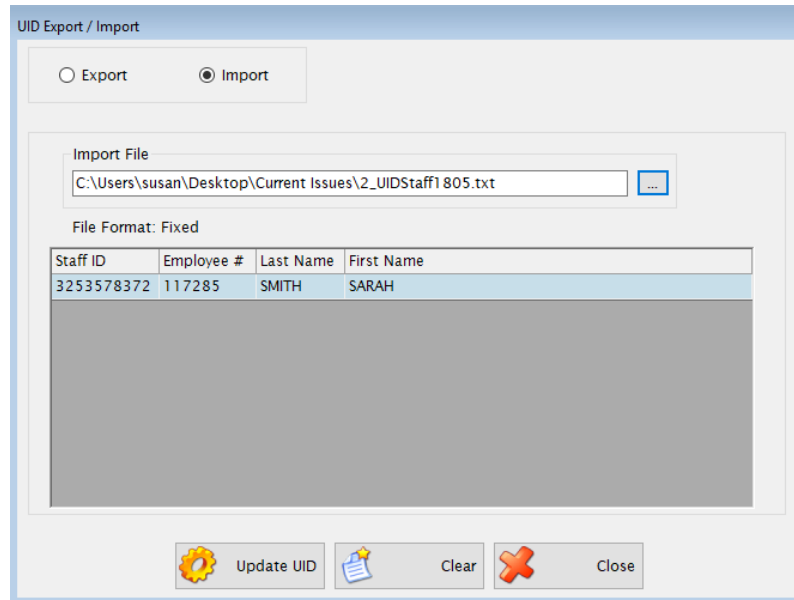
# Staff UID Process Step 5 – Import Staff UID file into LINQ

- The final step of the process is to import the UID file back into the payroll system. To import the Staff UID file, perform the following steps:
  - Sign on to LINQ Payroll
  - Select State Specific
  - Select UID Export/Import



# Staff UID Process Step 5 – Import Staff UID file into LINQ

- Select the Import radio button.
- Select  to browse to the location where you saved the file in Step 5.



UID Export / Import




☐ Export ☒ Import

Import File

C:\Users\susan\Desktop\Current Issues\2\_UIDStaff1805.txt

File Format: Fixed

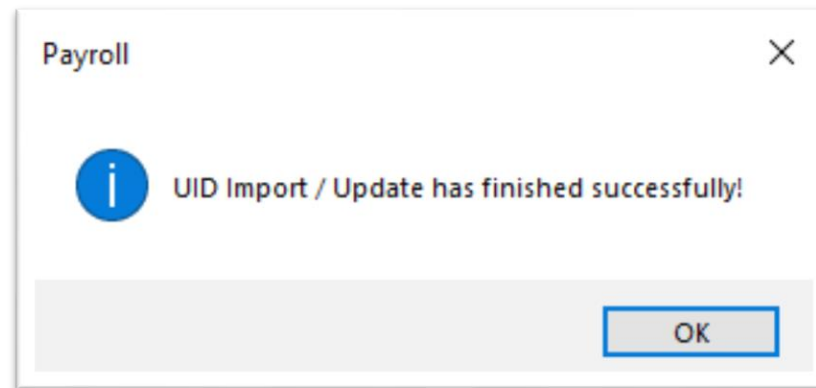
Staff ID	Employee #	Last Name	First Name
3253578372	117285	SMITH	SARAH

 Update UID  Clear  Close

- The file will load in the grid for you to verify. Select the Update UID button to upload the file.

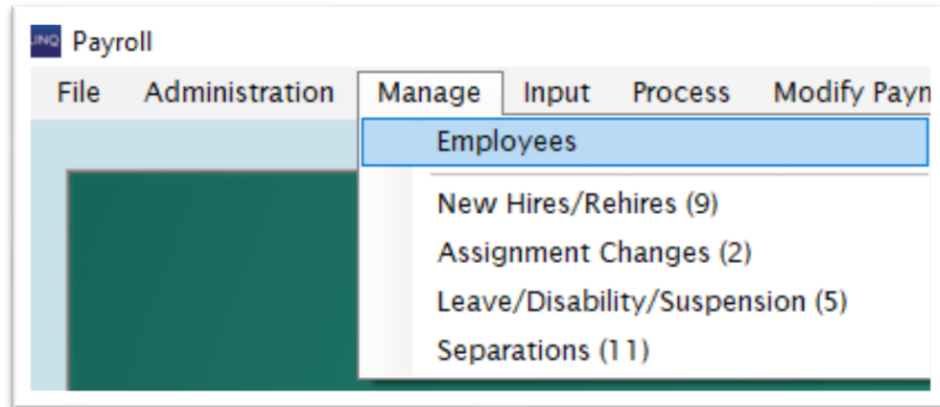
## Staff UID Process Step 5 – Import Staff UID file into LINQ

Once the import is complete, the message box below will appear.



# Staff UID Process Step 6 – Verify Import & New UIDs in LINQ

- To verify that the import was successful or to look up a UID number, follow the steps below.
  - Sign on to Payroll
  - Select Manage
  - Select Employees




# Staff UID Process Step 6 – Verify Import & New UIDs in LINQ

- The UID is stored on the Personal tab in the field labeled UID (toward the bottom right of the Manage screen).

Employees

**350001989 SMITH, SARAH J**

Personal | Contacts | Jobs | Deductions | Retirement | Tax | Dates of Service | Notes | Leave | Checks and Earnings | PPACA | Local Use Fields | Licensure

Employee #: 350001989  Auto Generate

Last Name: SMITH

First Name: SARAH

Middle Name: J

Preferred Name:

Primary Site: 001 - TRANSPORTATION DEPARTMENT

Building:

Social Security #: 111-11-1111 Sex: F

Address: 111 TEST DR

City/State/Zip: WILMINGTON NC 28403

Email: SARAH.SMITH@TESTDISTRICT.k12.nc.us

Alternate Email:

Local Hired Date: 11/23/1998 State Hired Date: 11/23/1998

Original Hired Date: 11/23/1998


Status: ACTIVE Date of Birth: 07/16/1958

Home Phone #: (919) 528-4256 Mobile Phone #:

Race

- ☐ Hispanic or Latino
- ☐ American Indian or Alaskan Native
- ☐ Asian
- ☐ Black
- ☐ Native Hawaiian or Other Pacific Islander
- ☒ White

UID: 3253578372



- To verify that the import was successful, lookup a staff member who received their first paycheck in the previous pay period. If the import was successful, the employee will have a UID #.



# Staff UID Best Practices

- Do not use the **REFRESH**, **BACK**, or **FORWARD** browser buttons. Always use the system links and buttons to navigate through Staff UID. Using the browser buttons will cause you to log back into 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.
  - 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.



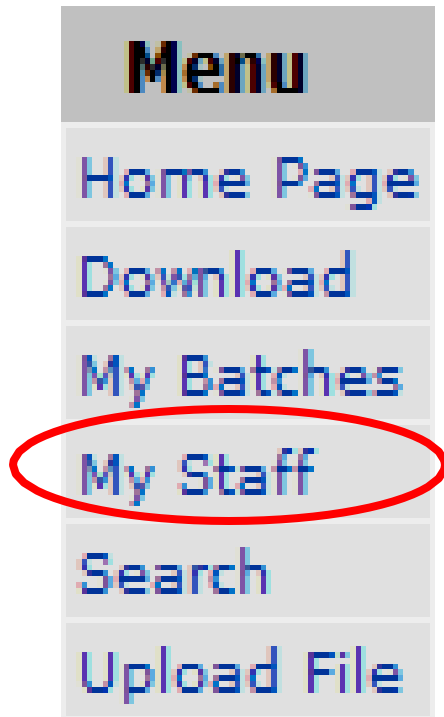
# Other Menu Items - My Batches Module



- 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 by other users within the same Charter School.



# 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 or charter school 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 Staff UID system.
- Note that staff information can be viewed and updated, depending on the role of the user. However, updates made to staff records apart from the ID assignment process will not be included in a batch file for completion of Step 5.

