



Public Schools of North Carolina

Unique Identifier for Staff (Staff UID) For Sartox-SunPac 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	
159	05/15/2009	DATA ERRORS PENDING	


[Show me all my batches](#)


Find A Batch 

Batches Pending - Fix Errors 

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

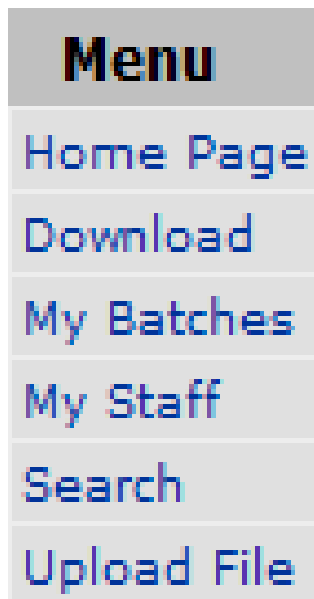
[Show me all batches pending with errors](#)

Batches Pending - Near Matches 

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

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

Navigating 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.

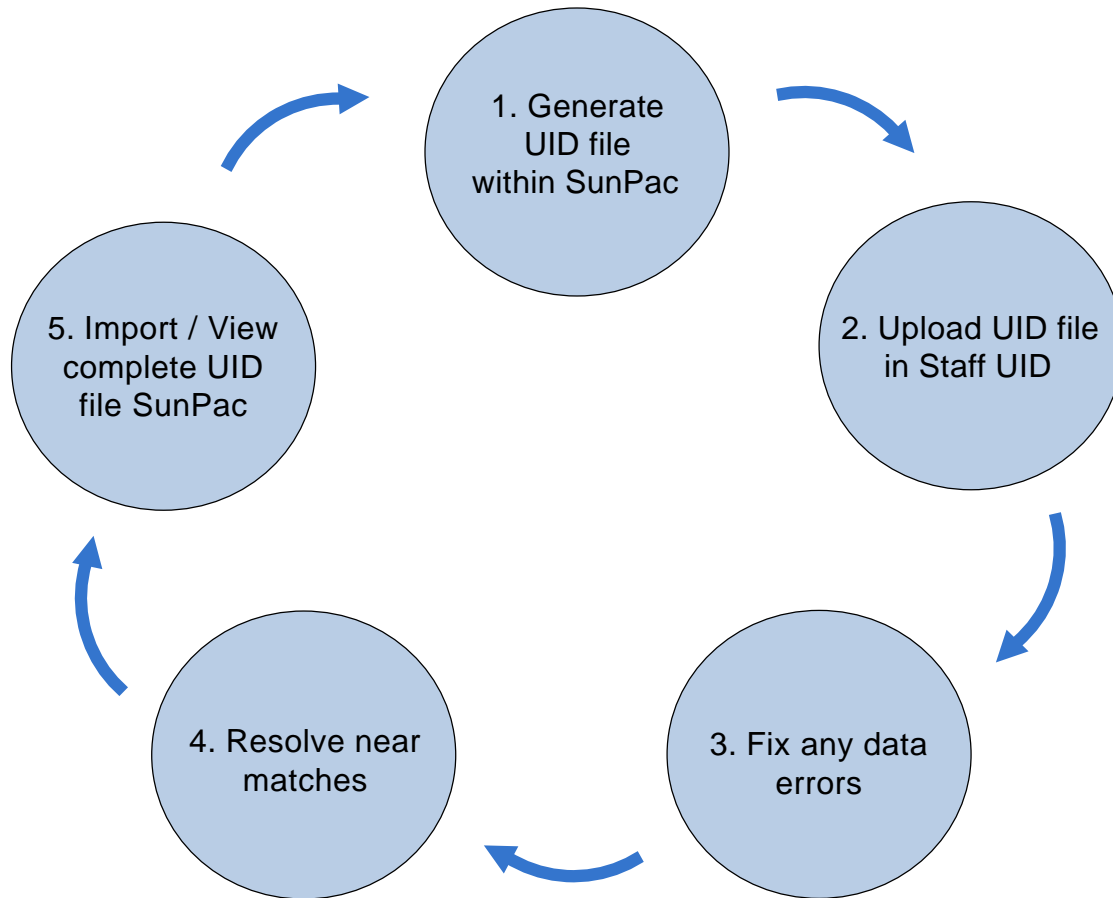
Find a Batch

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

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

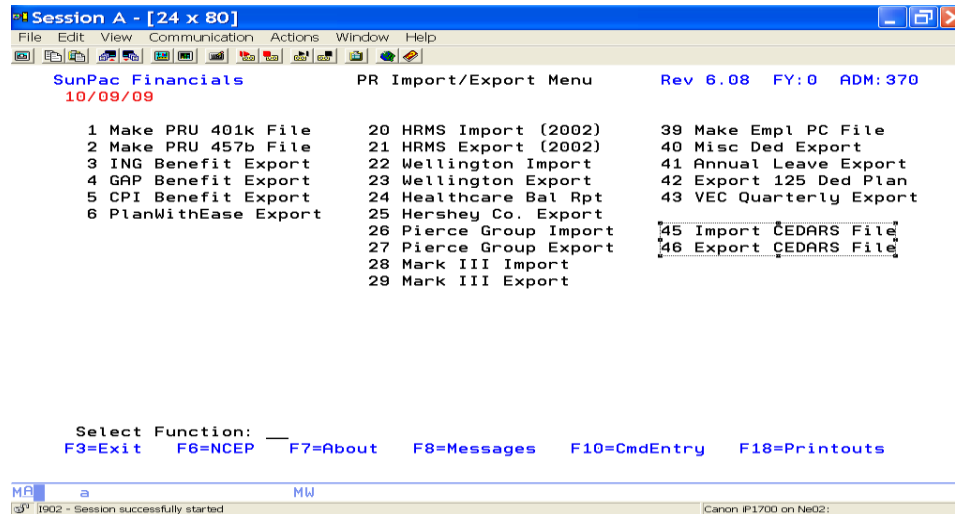


Staff UID Assignment Process Overview



Staff UID Process Step 1: Generate UID File in SunPac

- LEA/Charter generates the Staff UID file from their payroll system, from within the Sartox-SunPac application.
- To create the Staff UID file, perform the following steps:
 - Go to *Payroll Main Menu*
 - Go to *Option #36 Import/Export Menu*
 - Go to *Option #46 Export CEDARS File* (the export screen will be displayed)



The screenshot shows a terminal window titled "Session A - [24 x 80]". The window contains the following text:

```
File Edit View Communication Actions Window Help
SunPac Financials PR Import/Export Menu Rev 6.08 FY:0 ADM:370
10/09/09
1 Make PRU 401k File 20 HRMS Import (2002) 39 Make Empl PC File
2 Make PRU 457b File 21 HRMS Export (2002) 40 Misc Ded Export
3 ING Benefit Export 22 Wellington Import 41 Annual Leave Export
4 GAP Benefit Export 23 Wellington Export 42 Export 125 Ded Plan
5 CPI Benefit Export 24 Healthcare Bal Rpt 43 VEC Quarterly Export
6 PlanWithEase Export 25 Hershey Co. Export
26 Pierce Group Import 45 Import CEDARS File
27 Pierce Group Export 46 Export CEDARS File
28 Mark III Import
29 Mark III Export
```

At the bottom of the window, there is a prompt "Select Function:" followed by a list of function keys: F3=Exit, F6=NCEP, F7=About, F8=Messages, F10=CmdEntry, F18=Printouts. The status bar at the bottom shows "MR a MW" and "1902 - Session successfully started" on the left, and "Canon iP1700 on Net02:" on the right.

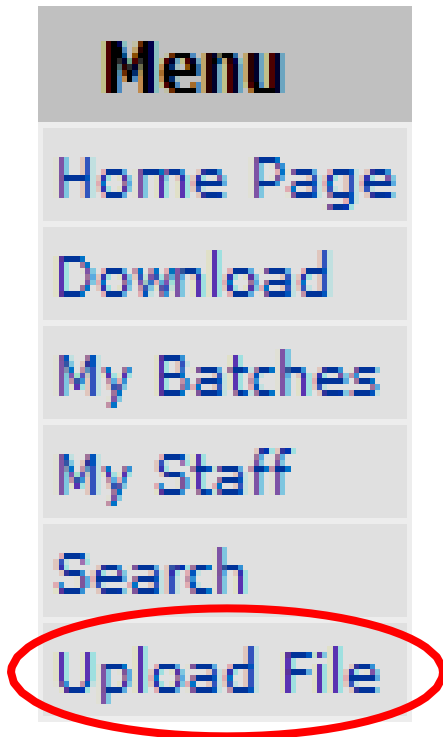


Staff UID Process Step 1: Generate UID File in SunPac

- **Fill in the parameters** on the *Export CEDARS File* screen.
 - Enter Fiscal Pay Period to Process.....01 (or appropriate pay period)
 - Move Export File To PC Now (Y/N)?.....Y
 - Enter Destination For Exported PC File...C:\SFFIN
- **Run the export.** The Staff UID file, named UIDStaffYYPP.txt, where YY=fiscal year and PP=fiscal pay period, is copied to the C:\SFFIN directory on the PC that initiated the export.
- The file will contain current employees and former employees that have been paid within the last 12 months. The only employees that are excluded are substitutes. If the substitutes serves in another role (bus driver, coach, etc.), then they will be included in the file.



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



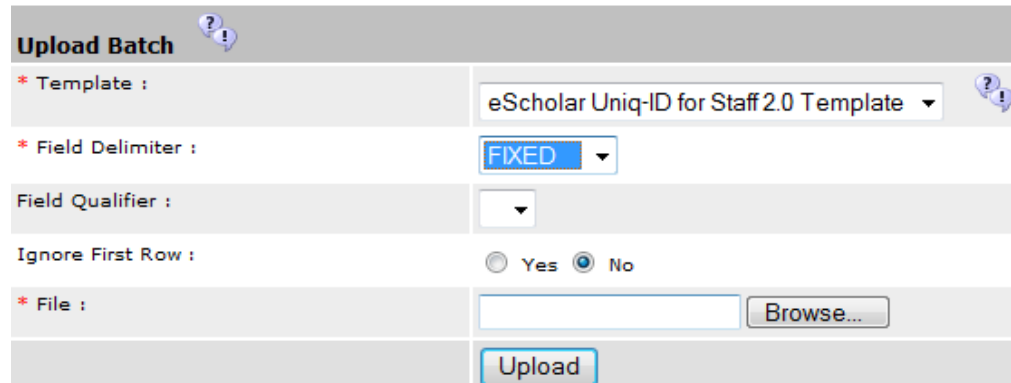
- Log in to Staff UID.
- Click the **Upload File** link from the Menu Bar.
- This module will allow users to upload their Staff UID batch files which were exported from the SunPac payroll system.



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' form with the following fields and values:

* Template :	eScholar Uniq-ID for Staff 2.0 Template
* Field Delimiter :	FIXED
Field Qualifier :	
Ignore First Row :	<input type="radio"/> Yes <input checked="" type="radio"/> No
* File :	<input type="text"/> <input type="button" value="Browse..."/>
<input type="button" value="Upload"/>	

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 SunPac 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:



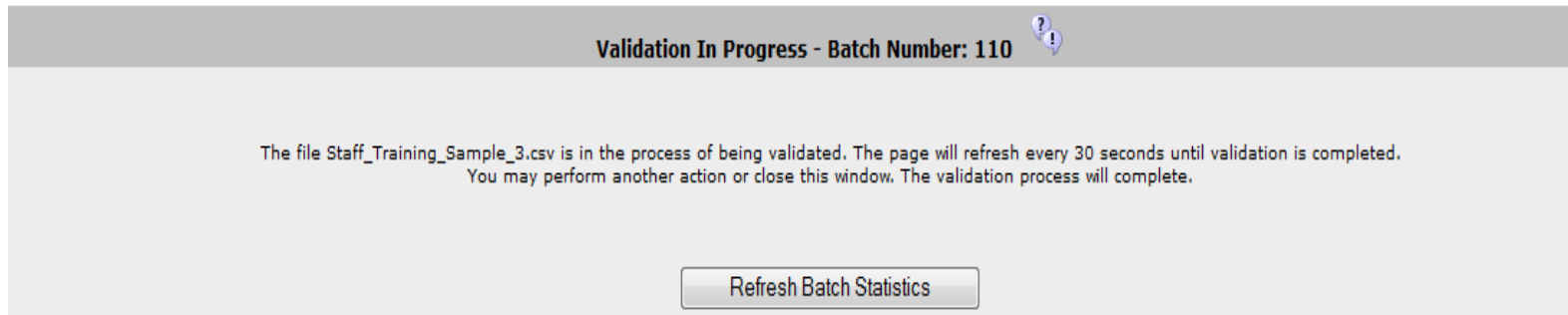
If the file cannot be uploaded, an error message will be displayed indicating that the file is not valid.

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.



Validation In Progress - Batch Number: 110

The file Staff_Training_Sample_3.csv is in the process of being validated. The page will refresh every 30 seconds until validation is completed. You may perform another action or close this window. The validation process will complete.

Refresh Batch Statistics



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	

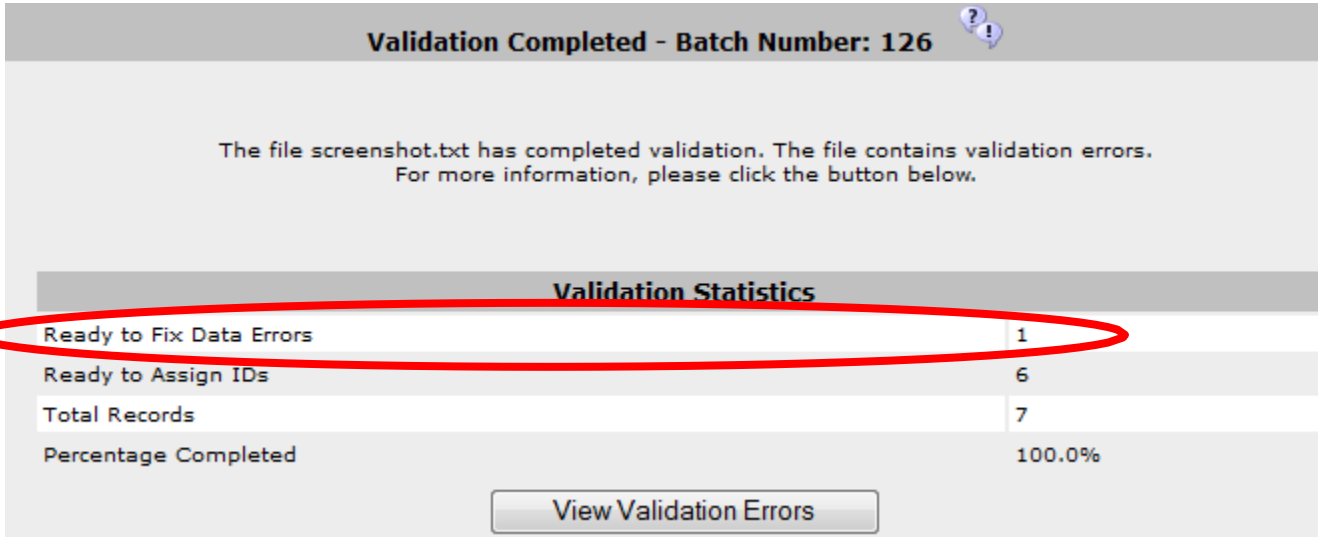
If the file contains a fatal error, then the batch will not be loaded into the Staff UID system.



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.



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

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

Below the table is a button labeled 'View Validation Errors'.

Note: Data errors should be fixed in the SunPac payroll system. After the errors are fixed in SunPac, 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 SunPac payroll system, perform the following steps:


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

Welcome, MFLANAGAN4147 [Sign Out]

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


Submission Type Extract Type From To

All **Errors To Fix** [Calendar] [Calendar] Filter Results

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

Displaying 1 to 1 of 1

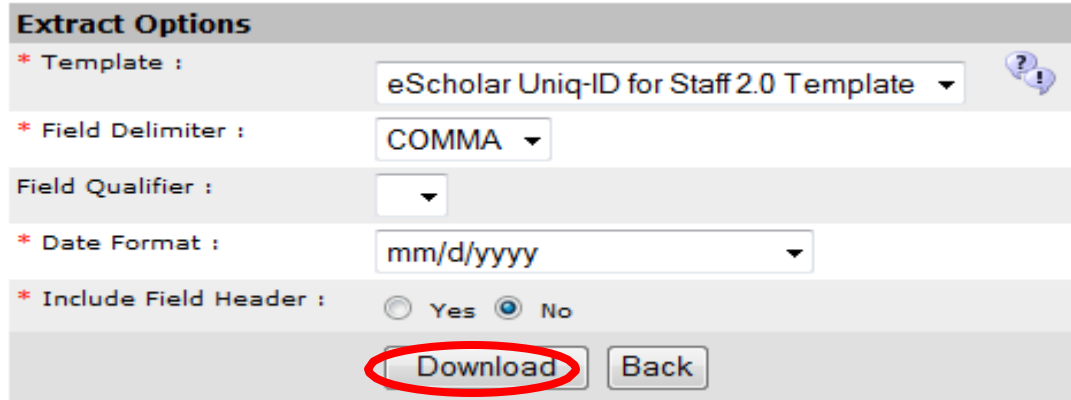
First Prev Next Last

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.



Extract Options

* Template : eScholar Uniq-ID for Staff 2.0 Template

* Field Delimiter : COMMA

Field Qualifier :

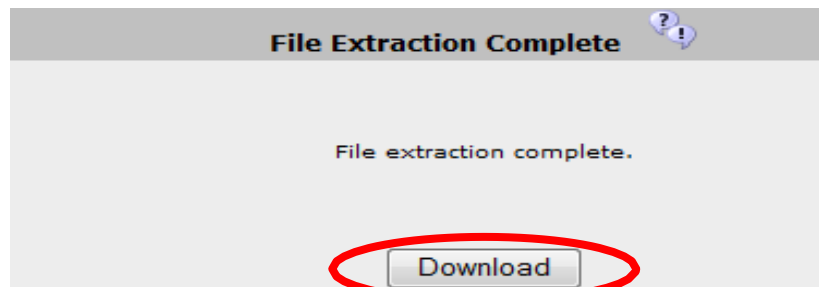
* Date Format : mm/d/yyyy

* Include Field Header : Yes No

Download Back

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

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



File Extraction Complete

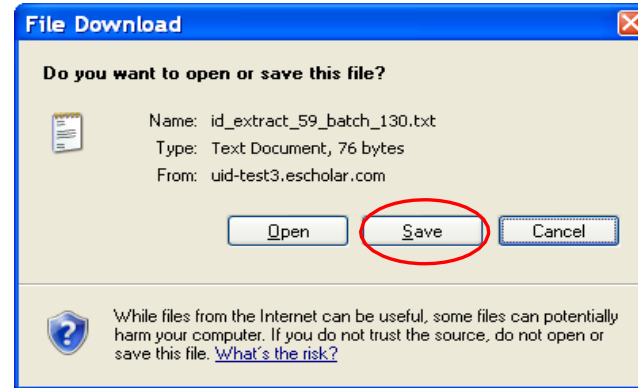
File extraction complete.

Download



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

Displaying 1 to 1 of 1





First Prev Next Last

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



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 	
General Information	
* First Name:	<input type="text" value="George"/>
Middle Name:	<input type="text" value="L."/>
* Last Name:	<input type="text" value="Macon"/>
Suffix:	<input type="text"/>
Full Staff Name:	<input type="text"/>
Previous Last Name:	<input type="text"/>
Itinerant Teacher:	<input type="radio"/> Yes <input type="radio"/> No
Staff ID:	<input type="text"/>
Personal Information	
* Gender:	<input checked="" type="radio"/> Female <input type="radio"/> Male
* Date of Birth:	<input type="text" value="01"/> / <input type="text" value="22"/> / <input type="text" value="1980"/>
SSN:	<input type="text"/> <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"/>

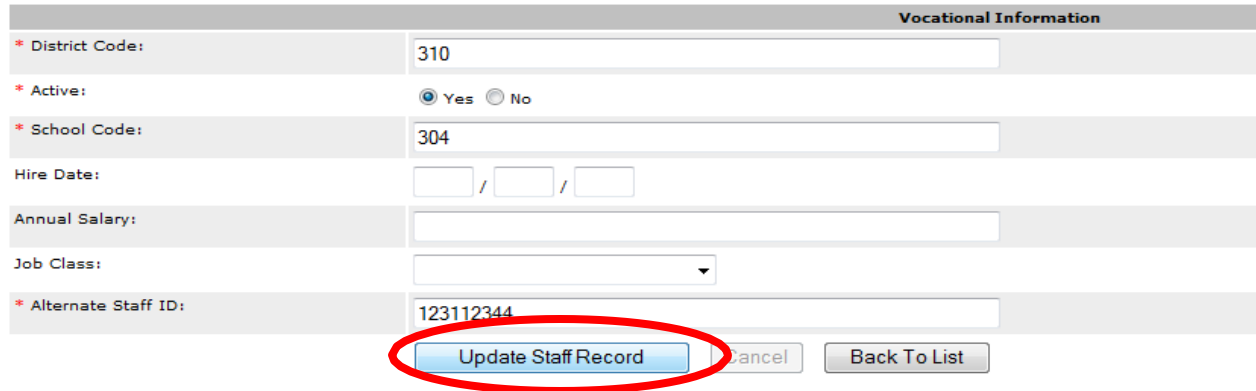
- Correct all data errors on the page.



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.

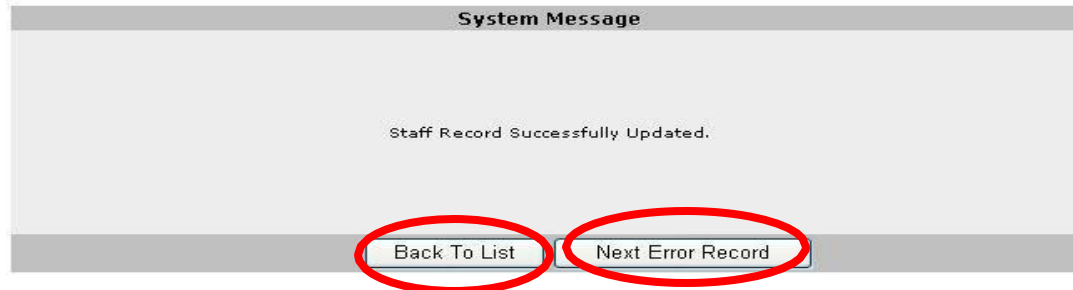


The screenshot shows a form titled "Vocational Information" with the following fields and values:

- * District Code: 310
- * Active: Yes No
- * School Code: 304
- Hire Date: [] / [] / []
- Annual Salary: []
- Job Class: []
- * Alternate Staff ID: 123112344

At the bottom of the form, 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 with the following text:

Staff Record Successfully Updated.

At the bottom of the dialog box, 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	
310 - Duplin County	304 - Mock School	Connel	Jeff	
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

- 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.

Resolve Match for Staff Member : 406044

Submission Record

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

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

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

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



Staff UID Process Step 4: Near Match Resolution

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

Near Match Details.		Potential Match: 2533525669 (View Staff Profile)	
General Information			
Staff ID:		2533525669	
First Name:	Megan	Megan	
Middle Name:	B		
Last Name:	Phillips	Winchester	
Suffix:	Jr		
Full Name:			
Previous Last Name:	Winchester		
Personal Information			
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:			
Vocational Information			
District Code:	450 - Henderson County	450 - Henderson County	
School Code:	301 - Apple Valley Middle	301 - Apple Valley Middle	
Job Class:			
Annual Salary:			
Hire Date:			
Alternate Staff ID:	2	2	
Active:	Yes	Yes	
<input type="button" value="Assign ID"/> <input type="button" value="Cancel"/> <input type="button" value="Back"/>			

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 View Staff Profile	
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 active, showing two job records for a staff member with a profile picture of a man with glasses and a blue shirt.

Job Class	Hire Date	Annual Salary	Alternate Staff ID	Active	Last Update Date
06B Crossnore Academy - 000 Crossnore Academy	11/22/2010	\$\$\$\$\$\$\$\$	33628	Yes	12/17/2010
880 Transylvania County Schools - 880 Locally Assigned	08/22/2007	\$\$\$\$\$\$\$\$	3628	No	06/29/2009



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
<input type="button" value="Assign ID"/> <input type="button" value="Cancel"/> <input type="button" value="Back"/>		



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: #####

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: #####



Staff UID Process Step 5 – Import Staff UID file into Sartox

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 Sartox


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

Extract Options

* Template : eScholar Uniq-ID for Staff 2.0 Template 

* Field Delimiter : FIXED 

Field Qualifier : 

* Date Format : mm/dd/yyyy 

* Include Field Header : Yes No

4. Click the **Download** button.

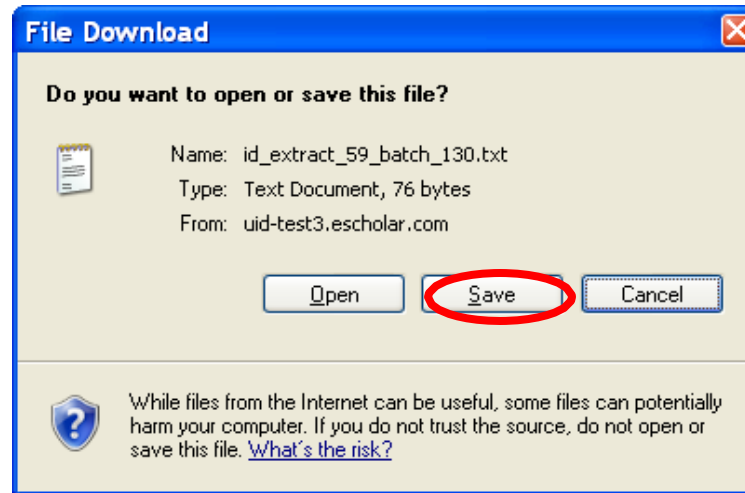


Staff UID Process Step 5 – Import Staff UID file into Sartox

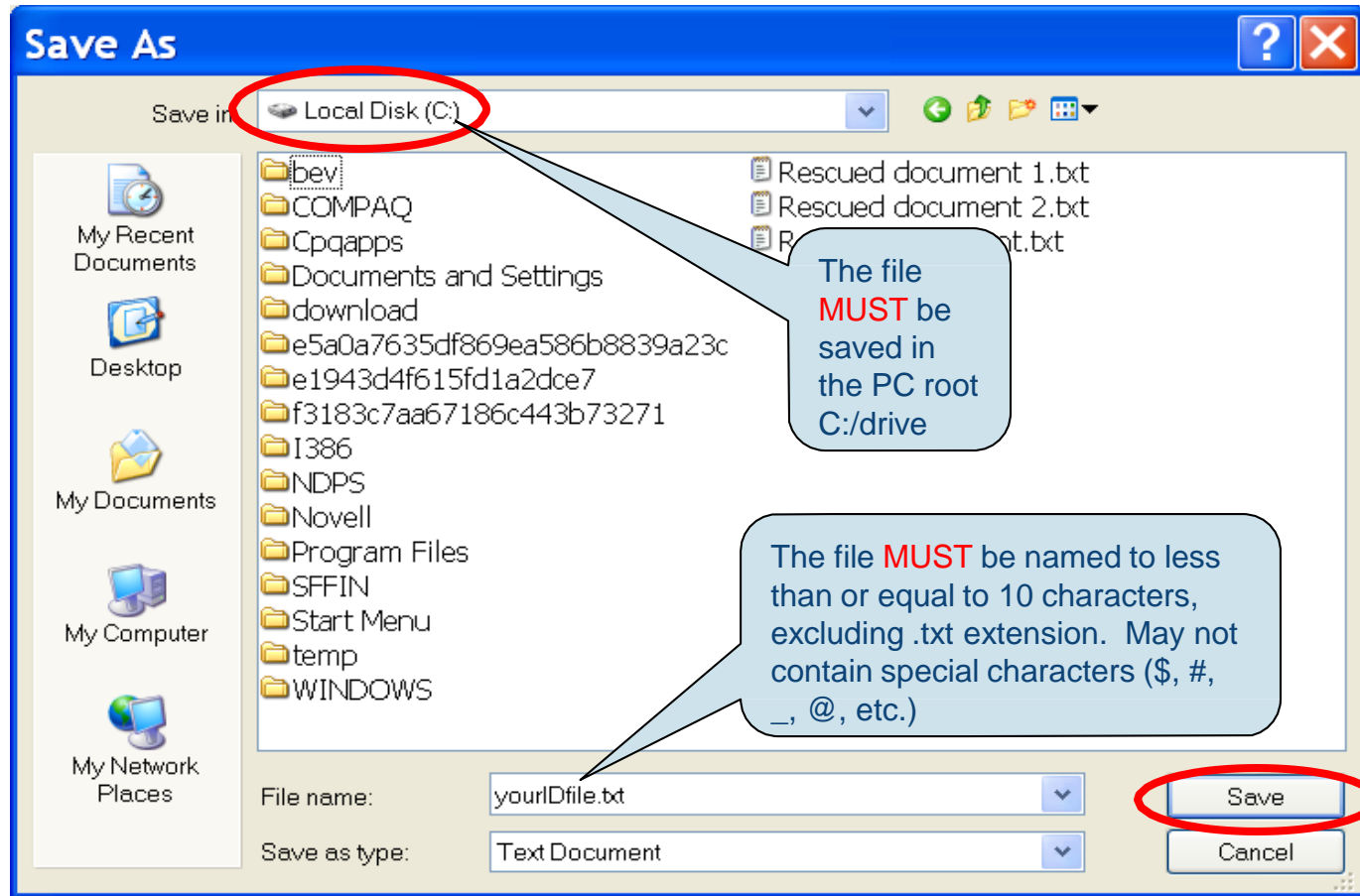
5. The system will briefly display a status message page and then a File Extraction complete notice. Click the Download button



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



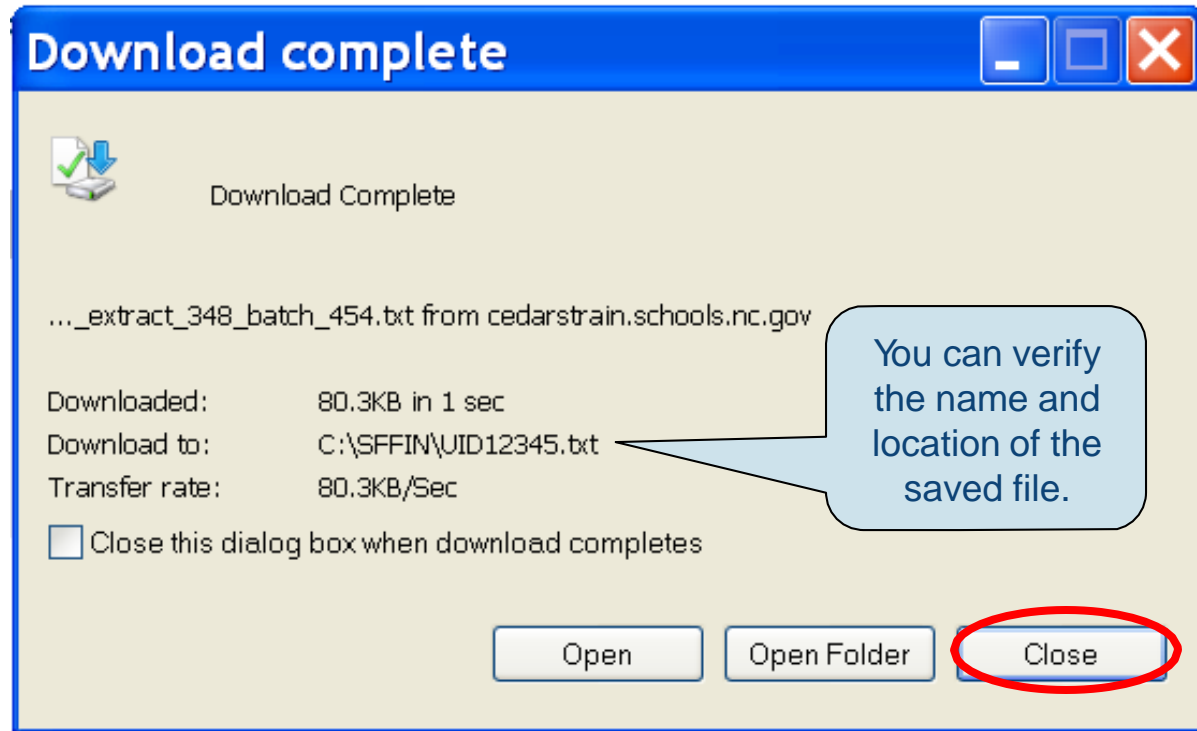
Staff UID Process Step 5 – Import Staff UID file into Sartox



- 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 Sartox

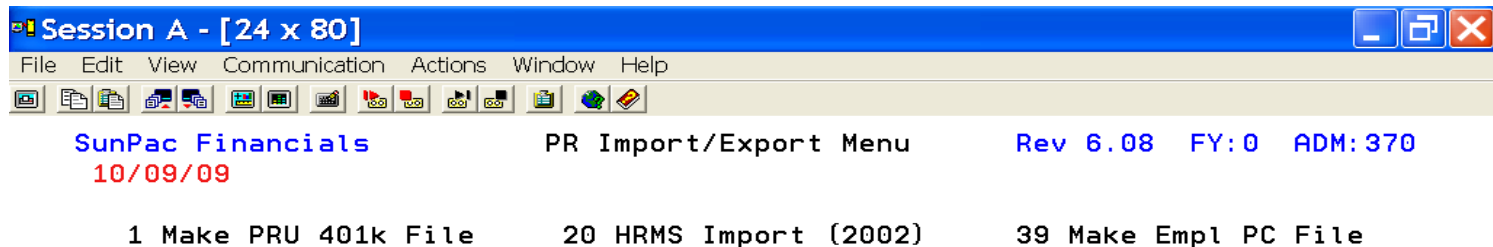


- Click the Close button.
- Return to the application home page by clicking the Home Page link in the Menu.



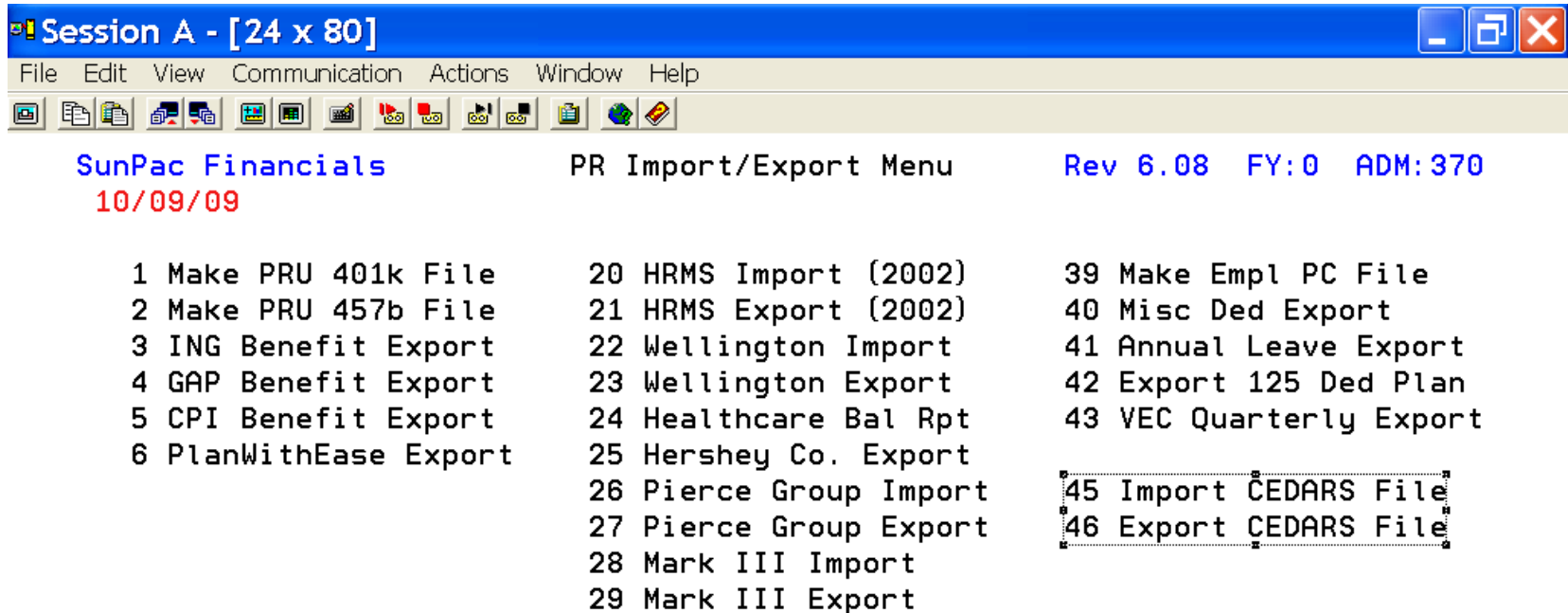
Staff UID Process Step 5 – Import Staff UID file into Sartox

- 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:
 - Login to Sartox-SunPac.
 - Ensure you have access to import the UID file to your payroll system
 - Ensure your FTP server has been started
 - From the Payroll Main Menu, select *Option #36 Import/Export Menu*



Staff UID Process Step 5 – Import Staff UID file into Sartox

- Select *Option #45 Import CEDARS File* (Make sure the user has access to the Import CEDARS File option in Sartox-SunPac).



```
Session A - [24 x 80]
File Edit View Communication Actions Window Help
SunPac Financials          PR Import/Export Menu          Rev 6.08  FY:0  ADM:370
10/09/09

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



Staff UID Process Step 5 – Import Staff UID file into Sartox

Ensure that the import file settings are set to the following:

- Is this a Trial or Update Run? **Y**
- Require Match on Employee Last Name? **N**
- Move Import File From PC to AS400 Now? **Y**
- Enter Location of PC File to Import: **C:\SFFIN**
- Enter Filename of PC File to Import: **(file name from the beginning of Step 5).txt**
- Enter Printer Name: **'QPRINT'** or enter other printer name

```
Import CEDARS Staff IDs

1 Is this a Trial or Update Run? (T/U)..... *
2 Require Match On Employee Last Name (Y/N)?..... Y
3 Print Exceptions Only? (Y/N)..... Y
4 Move Import File From PC To AS/400 Now (Y/N)?..... Y
5 Enter Location Of PC File To Import..... C:\SFFIN
6 Enter Filename Of PC File To Import..... CEDIMPF.TXT
7 Enter Printer Name..... PRT01
```



Staff UID Process Step 5 – Import Staff UID file into Sartox

F3=Exit

F9=Recall Options

F10=Save Option

F11=Submit to Batch

```
MA a MW
1902 - Session successfully started Canon IP1700 on Ne02:
```

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



Staff UID Process Step 5 – Import Staff UID file into Sartox

Import File Error Correction

If any errors are received while importing the Staff UID file into the payroll system, check the following.

- Verify that the Staff UID file was named correctly during the download.
 - Do not use any special characters or spaces in the file name.
 - File extension .txt is included in the upload.
 - File name length not to exceed 20 characters (including the file extension).
- Verify that the Staff UID file path and file name used when importing the file matches the path and file name used in the downloading process.
- Download another copy of the batch file from Staff UID and attempt to import the file again into Sartox-SunPac.
- Ensure that the FTP server is running. If the FTP server is not running, start the FTP server and attempt the import again.
- If further assistance regarding errors received during the import process into the Sartox-SunPac payroll system, please contact the Sartox Help Desk.



Staff UID Process Step 5 – Import Staff UID file into Sartox

Viewing Imported UIDs in SunPac

The imported Staff UID file can be viewed on the *Employee Master File Update/Inquiry* Screen. The Staff ID# (UID) is visible in the lower-right side of the screen.

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



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.



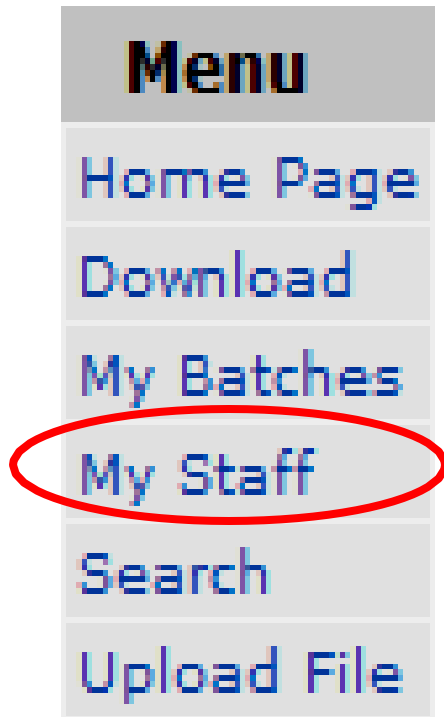
Other Menu Items - My Batches Module



- 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.



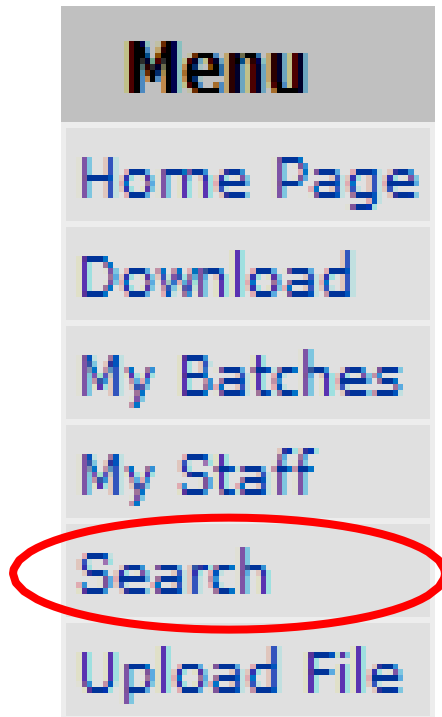
Other Menu Items - My Staff Module



- 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.

