

WISEid Basics

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What's WISEid? How does it relate to WISEdata?

WISEid is an application to assign and maintain unique, permanent, and unduplicated identifiers for staff and students

- Each student and staff needs a WISEid to associate a person to their data
- WISEid follows the person even from student to staff role, throughout Wisconsin
- For students WISEid data links to and must match data in WISEdata
- For all classroom related **staff** in WISEdata you must have a WISEid and **staff** Local Person ID for Roster to work correctly
- **Local Person ID is NOT WISEid.** Local Person ID is your districts ID for person.

Minimum Required Demographics for WISEid

1. Gender
2. Race/Ethnicity
3. Birthdate
4. At least one Parent/Guardian Name
(Only if student Local Person ID)

WISEid/WISEdata Student Timeline

Beginning of Year:

1. **Collect all demographic information to attain WISEids**
2. **For Choice Schools only - All Student Report Card**
 - a. opt-in (report all students)
 - b. opt-out (report Choice participants)
3. **Verify with SIS vendor upload schedule**
 - a. automatic nightly job runs in the background to update existing WISEids from WISEdata data collections from most recent primary enrollment
 - b. manual uploads weekly if your vendor doesn't allow WISEid creations inside your systems (Identity API) otherwise monthly or quarterly

WISEid/WISEdata Student Timeline

During the School Year:

1. Review and correct WISEdata validation messages related to WISEid discrepancies for current year primary enrollment students
2. Attain new WISEids for new students and staff that will be reported
3. Manual uploads weekly if your vendor doesn't allow WISEid creations inside your systems (Identity API) otherwise monthly

WISEid/WISEdata Student Timeline

End of Year:

- 1. Review and correct WISEdata validation messages related to WISEid discrepancies**
- 2. Prepare enrollment paperwork to collect all required WISEid information for next year**

Year Round Activities

- 1. Follow up at a minimum weekly on WISEid Change Requests**
 - a. Review CR you are the dependent agency for possibly incorrect WISEid matching or typos
 - b. Review CR you are the requester agency for new comments and denials
- 2. Follow up at a minimum weekly on WISEid Match Reviews. Match Reviews are necessary when there is not an automatch for one exact match both by Person Upload and the student automatic nightly update job.**

WISEdata to WISEid update job

- Jobs runs once per day at 9 PM to 10 PM feeding in WISEdata ODS data changes from the last day into WISEid.
- At the start of year the job only captures data once you start pushing data for that school year to WISEdata so you may still need to do WISEid Person Uploads before you turn on your data transfers from your SIS to WISEdata. Recommend still doing WISEid Person Uploads at start and end of year in case we miss data.
- Follows these field by field [rules](#)
- Provides updated solution for vendors who provide ability to provision WISEids and attach Local Person IDs inside their own systems (Ed-Fi Identity API). Vendor end can only create brand new WISEids. This job handles most of the changes to WISEid matches.

At the Start of School Year in WISEid

1. Log in to WISEid
2. Update both Primary and Secondary Contacts each school year
3. Under “Admin Menu” on the bottom left of the screen, select “Agency Notifications”
4. Enter the email addresses for staff that work with WISEid

The screenshot displays the WISEid interface for Agency Notifications. The top navigation bar includes 'Overview', 'Agency Notifications', 'Change Requests', and 'Notification Inbox'. A large arrow points to the 'Agency Notifications' tab. Below the navigation bar, there is a '+ Add Email' button and a table with columns for 'Email', 'Frequency' (M, T, W, TH, F), 'Edit', and 'Delete'. The table contains three rows of data:

Email	Frequency					Edit	Delete
	M	T	W	TH	F		
[Redacted]	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
New Change Request Comments - Student Data						<input type="checkbox"/>	
Change Request Action Needed - Student Data						<input type="checkbox"/>	
File Upload has Errors - Student Data						<input checked="" type="checkbox"/>	

WISEid Agency Notifications

1. “Opt-In” to Staff/Student Agency Notifications emails
2. Select the days of the week you would like email notifications (notifications will only be sent if needed), and “update”.

WISEid / Agency Notifications

+ Add Email

Email	Frequency					
	M	T	W	TH	F	
▶ Carrie.boe@dpi.wi.gov	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="button" value="Update"/> <input type="button" value="Cancel"/>

◀ 1 ▶

WISEid Notifications Inbox

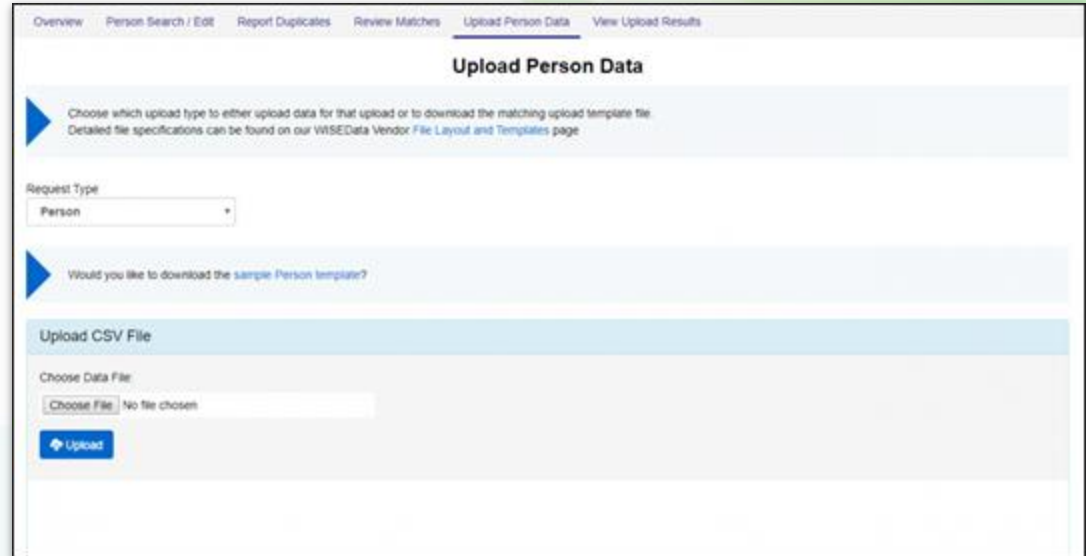
- Find under Message Center menu
- All Notifications come to this Inbox about potential data issues regardless if you have an email notification setup
- Recommend reviewing at least weekly - unread say “New”

The screenshot shows the WISEid web application interface. At the top, there is a navigation bar with the following items: "UAT", "WISEid", "Home", "Message Center" (with a "New" badge), "Manage Person Data", "Reports", "Resources", and "Need Help?". On the right side of the navigation bar, it says "Welcome Developer Test" and "3269 - Madison Metropolitan School District". Below the navigation bar, there is a secondary menu with "Overview", "Agency Notifications", "Change Requests" (with a "28" badge), "Duplicate Merge Requests", and "Notification Inbox" (with a "236" badge). The main content area is titled "Notification Inbox" and contains a blue arrow icon followed by the text: "See below for important system notifications regarding action required by your district to maintain data quality." Below this is a table with the following data:

Inbox		Delete Selected
<input type="checkbox"/>	Date	Subject
<input type="checkbox"/>	11/23/2022 12:31:04 PM	New Validation Errors/Warnings New
<input type="checkbox"/>	11/9/2022 1:00:48 PM	Certification Status Preliminary New

WISEid File Tasks: Upload

1. From your SIS/Staff System, complete a WISEid .csv file export.
1. Log in to WISEid and select “Manage Person Data” and “Upload Person Data”.



The screenshot shows the 'Upload Person Data' interface within a web application. At the top, there is a navigation bar with tabs: 'Overview', 'Person Search / Edit', 'Report Duplicates', 'Review Matches', 'Upload Person Data' (which is the active tab), and 'View Upload Results'. Below the navigation bar, the main heading is 'Upload Person Data'. A blue arrow icon points to a text box that says: 'Choose which upload type to either upload data for that upload or to download the matching upload template file. Detailed file specifications can be found on our WISEData Vendor File Layout and Templates page'. Below this, there is a 'Request Type' dropdown menu with 'Person' selected. Another blue arrow icon points to a text box that says: 'Would you like to download the sample Person template?'. Below this, there is a section titled 'Upload CSV File'. Underneath, there is a 'Choose Data File' label, a 'Choose File' button, and a text box that says 'No file chosen'. At the bottom of this section, there is a blue 'Upload' button with a white arrow icon.

File Tasks: Results

- Use the Results link to view file upload types and statuses
- Use these results to find the cause of errors and to investigate potential matches that need to be resolved

The screenshot displays the 'View Upload Results' page. At the top, there is a navigation bar with links: Overview, Person Search / Edit, Report Duplicates, Review Matches, Upload Person Data, and View Upload Results. Below the navigation bar, the title 'View Upload Results' is centered. A blue arrow icon points to a descriptive text box: 'File queue of all file uploads types and their status is located here. Shows status while files are not yet complete and also after completion. When file processing is complete you can drill into errors for causes and drill into potential matches to be resolved. Downloads provide an upload results file including results and any errors.'

Below the text box is a search form with the following fields:

- File Name:
- Status:
- Upload Date:
- User ID:

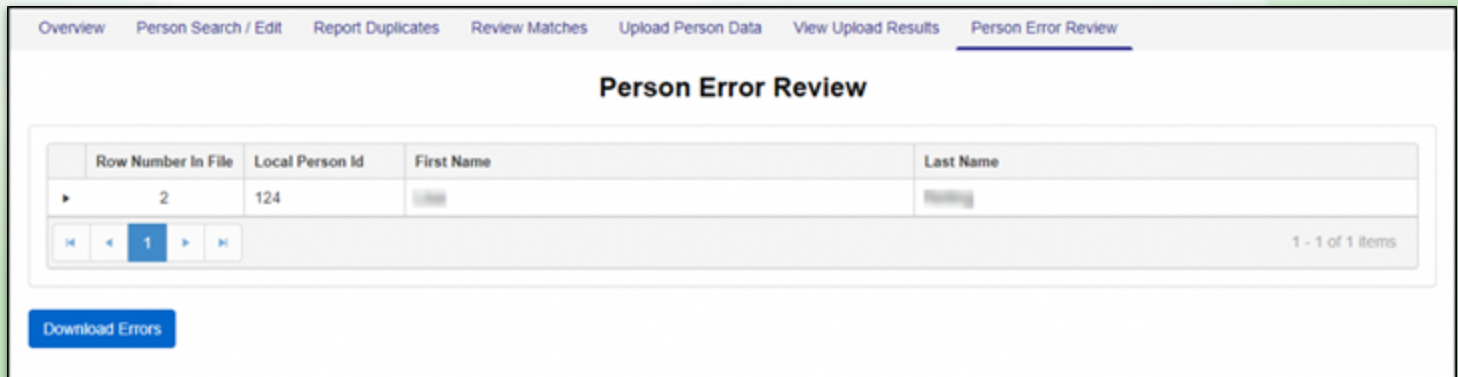
Under the search form, there is a 'Request Type' section with two selected tags: 'Person - Student' and 'Person - Staff'. A 'Search' button is located below the tags.

At the bottom of the page is a table with the following columns: Type, File name, Status, Errors, Potential matches, Committed, Changes, Upload date, User ID, and a 'Download' button. The table contains four rows of data:

Type	File name	Status	Errors	Potential matches	Committed	Changes	Upload date	User ID	
P	testStaff.csv	Completed	0	0	1		08/20/2019 10:17:27 AM	Schueler, N	Download
P	testStudent.csv	Completed	0	0	1		08/20/2019 10:16:23 AM	Schueler, N	Download
P	testStaff.csv	Completed	0	0	1		08/19/2019 12:54:07 PM	Schueler, N	Download
P	testStaff.csv	Completed	0	0	0		08/19/2019 12:52:54 PM	Schueler, N	Download

File Tasks: Results continued

- Click on the number under the Errors column to view those errors
 - Error rows are not uploaded into system and fixes will have to be reuploaded or manually fixed
 - If you reupload once fixed Error Count will go away
- If you have many errors, it may be more efficient to open the Results Download file to locate errors



The screenshot displays the 'Person Error Review' interface. At the top, there is a navigation bar with tabs: Overview, Person Search / Edit, Report Duplicates, Review Matches, Upload Person Data, View Upload Results, and Person Error Review (which is currently selected). Below the navigation bar, the title 'Person Error Review' is centered. A table with the following columns is shown: Row Number In File, Local Person Id, First Name, and Last Name. The table contains one row with the following data: Row Number In File: 2, Local Person Id: 124, First Name: [redacted], Last Name: [redacted]. Below the table, there is a pagination control showing '1' of 1 items. At the bottom left, there is a blue button labeled 'Download Errors'.

Row Number In File	Local Person Id	First Name	Last Name
2	124	[redacted]	[redacted]

1 - 1 of 1 items

Download Errors

WISEid Change Requests

- **Change Requests can be generated by either:**
 - file upload
 - WISEdata to WISE update job - students only
 - manual edits in WISEid application
- **It's important you enter that you verified school district approved documentation within the comments of the Change Request**
- **On Results page file upload CR will move from Changes column count to Committed once approved**

WISEid Change Requests

Change Request Process:

- CR that involve a birth date or Entity ID go to DPI CST to review.
- Other agencies have 7 days to deny a CR for first and middle names
- Other change fields maybe be bundled with changes above but aren't primary cause. They are bundled together in case this is the wrong person.
- CR should only be denied when you think the other district has the wrong person or has made an obvious mistake

Change Requests

Overview Agency Notifications **Change Requests** Notification Inbox

Change Requests

Agency Change Requests

Status: Pending Action Needed: New Comments: WISEid: Requesting Agency: Select Requesting Agency...
Upload File: Any upload file Local Person Id Type: All Change Type: All Dependent Agency: Select Dependent Agency...
Filter Reset Download Change Requests

Action Needed	New Comments	Status	WISEid	Create Date	Requesting Agency	Modified Date	Not Responded	Approved	Denied
		Pending	[blurred]	7/17/2019 11:16 AM	[blurred]	8/05/2019 10:25 AM	1	0	0
		Pending	7644703248	11/06/2021 10:59 AM	2450 - Arrowhead UHS School District	11/06/2021 10:59 AM	2	0	0

Change Request for: **7644703248: staff staff**

Requested Changes | Dependent Agencies | Comments | Person Change History

Field	Old Value	New Value
FirstName	staff	UAT
LastName	staff	Smith
MiddleName		Testing

Approve Deny

Change Requests: Some Common Issues

- **Verify using documentation**
 - **Birth certificate or any documentation your district policy allows**
- **Be sure you have the correct person**
- **Check your upload results to verify if change requests were intentional**
- **Enter required comments for change request to be approved**

Change Requests: New Verification Tools

- Warnings on CR with potential issues such as birth date not plausible given student enrollment and/or staff assignments
- Access to previous change history, enrollment details and assignment details of a person on the Change Request record to aid with approval

Change Request for: **Joseph Andrew Lawrence**

Requested Changes | Dependent Agencies | Comments | Person Change History

Field	Old Value	New Value
BirthDate	14/10/70	11/03/1971

Staff Assignments

Year	Working LEA	Working LEA	Working School
2022 - 2023	3619 - Milwaukee School District	3619 - Milwaukee School District	0375 - Adult Ed
2020 - 2021	2217 - Grafton School District	2217 - Grafton School District	0000 - District-wide
2019 - 2020	2217 - Grafton School District	2217 - Grafton School District	0060 - John Lung Mt
2018 - 2019	2217 - Grafton School District	2217 - Grafton School District	0030 - Kennedy El
2017 - 2018	4020 - Racine Unified School District	4020 - Racine Unified School District	0114 - Racine Early Education Cn

Comment (Required)
Enter comments supporting reason for appeal

Approve to DPH

WISEid Change Requests

Appeal a Change Request Denial

- If a CR is denied, the agency initially requesting the change will have one chance to appeal to DPI
- With the denied CR selected, center comments about why you believe the change should be approved
- DPI staff will then review the appeal and either approve or deny it

If DPI denies the request for appeal, it cannot be appealed a subsequent time

You will have to create a Help Desk Ticket to resolve if appeal already denied

Why Should You Deny a Change Request?

- CR should only be denied when you are certain that the request is incorrect (for example, likely wrong person or not likely correct changes such as typos)
- If you believe that two people are incorrectly sharing the same WISEid, please create a Help Desk Ticket and a WISE support member can help you split the people

In the future we plan to create split reporting functionality inside of WISEid

Potential Matches

Click the Potential Matches blue box from your View Upload Results page or Review Matches Page

Click Review for the person who has a potential match

Overview Person Search / Edit Report Duplicates **Review Matches** Upload Person Data View Upload Results

Review Matches

Potential Matches Found

Some of the people you upload may match existing people in our system. Please review all potential matches to avoid creating duplicates.

Remove Selected **Remove All**

Filter by Upload Local Person ID Type: All

Id	Local Person ID	First name	Middle name	Last name	Suffix	Gender	Birthdate	Multiple Birth Indicator	Race/Ethnicity	Entity ID	
<input type="checkbox"/>	Student - [REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]		F	5/3/2005		0004		Review Remove
<input type="checkbox"/>	Student - [REDACTED]	[REDACTED]		[REDACTED]		M	07/19/2006		0001		Review Remove

Match Review Process

A new screen will pop up. The top box will show what you have uploaded. Below this box will display existing people who look similar. In the bottom box you will notice green highlights on fields. These highlights show you fields that match what you have uploaded.

Does this person match an existing record?
We may have found a match that seems similar to an existing person in our system. Please verify if this person matches one of these people.

Here is the record you uploaded:

Local Person ID	Local Person ID Type	First Name	Middle Name	Last Name	Suffix	Gender	Birth Date	Multiple Birth Indicator	Race/Ethnicity	Entry ID
	Student					F	5/3/2005		0004	

Parent / Guardian(s)

Parent First Name	Parent Middle Name	Parent Last Name	Parent Suffix	Parent Type
				G

Birth Location

Birth City	Birth State	Birth County	Birth Country
			Puerto Rico

Other Name(s)

First Name	Middle Name	Last Name	Suffix

Match Review Process

If you determine that this is a match to the uploaded person, click the radio button located between the Details and WISEid columns for that person in the blue box. Otherwise click radio button for Create a new person.

Does this person match an existing record?
We found a match that seems similar to an existing person in our system. Please verify if this person matches one of these people.

Here is the record you uploaded:

Local Person ID	First name	Middle name	Last name	Suffix	Gender	Birthdate	Race
144482	Jill		Blaedow		F	11/21/1962	0037 - White

Radio buttons.

Here are the existing people that look similar:

Details	WISEid	Local Person ID	First name	Middle name	Last name	Suffix	Gender	Birthdate	Race
<input type="radio"/>	<input checked="" type="radio"/>	24073	Jill		Blaedow		Female	11/21/1962	White
<input type="radio"/> Create a new person (this person does not match any of the above)									

Match Review Process

On the following screen you have the option of accepting or cancelling the creation of the new person record

Resolve Match Summary

Please review before confirming local person Ids and additional names will be added. Any changes to current name or demographic information will now go through the Change Request Process and may not take effect immediately.

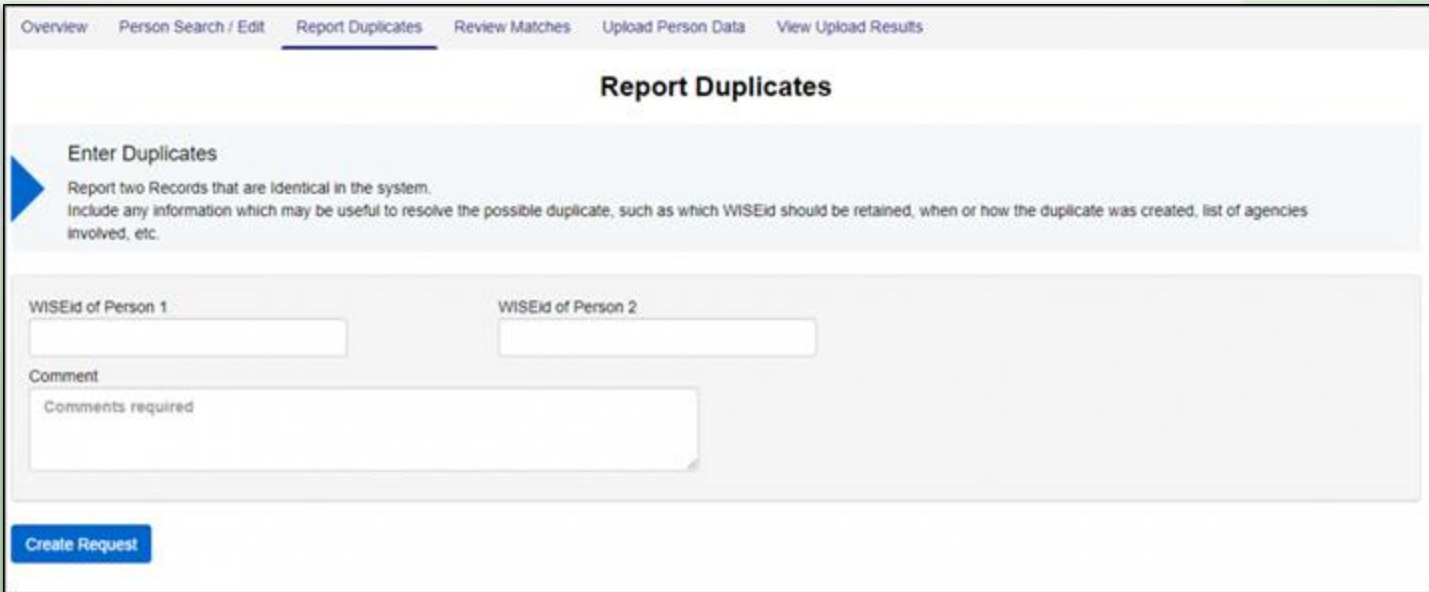
Here is the new record that will be created.

Local Person ID	First name	Middle name	Last name	Suffix	Gender	Birthdate	Multiple Birth	Race key
test335ddd	Monkey	fdxxxxddd	Do	Jr	M	5/9/1992		0037 - White

WISEid Tools: Report Duplicates

Report Duplicates

If you find that one person has two different WISEids associated, you should report the WISEids as duplicates.



The screenshot shows a web interface for reporting duplicates. At the top, there is a navigation bar with links: Overview, Person Search / Edit, Report Duplicates (which is underlined), Review Matches, Upload Person Data, and View Upload Results. Below the navigation bar, the title 'Report Duplicates' is centered. A blue triangle icon is on the left side of the 'Enter Duplicates' section. The instructions state: 'Report two Records that are identical in the system. Include any information which may be useful to resolve the possible duplicate, such as which WISEid should be retained, when or how the duplicate was created, list of agencies involved, etc.' There are two input fields for 'WISEid of Person 1' and 'WISEid of Person 2'. Below these is a 'Comment' section with a text area and the label 'Comments required'. At the bottom left, there is a blue button labeled 'Create Request'.

Overview Person Search / Edit Report Duplicates Review Matches Upload Person Data View Upload Results

Report Duplicates

Enter Duplicates

Report two Records that are identical in the system.
Include any information which may be useful to resolve the possible duplicate, such as which WISEid should be retained, when or how the duplicate was created, list of agencies involved, etc.

WISEid of Person 1

WISEid of Person 2

Comment

Comments required

Create Request

WISEid Tools: Search/Edit

Search/Edit

- This feature allows you to look up persons by entering known information about them and clicking Search
- Use this tool to make any necessary changes (often flagged by WISEdata error/warning)

The screenshot displays the WISEid web application interface. At the top, a navigation bar includes links for Home, Message Center, Manage Person Data, Reports, Resources, and Need Help?. The user is logged in as Carrie Boe. The main content area is titled 'Person Search/Edit' and contains a search form. The form includes the following fields:


- ID: WISEid or Local Person ID
- First Name: [Text input]
- Middle Name: [Text input]
- Last Name: [Text input]
- Entity ID: Entity ID
- Birthdate: mm/dd/yyyy
- Gender: Select Gender... (dropdown menu)
- Suffix: Suffix... (dropdown menu)

At the bottom of the form, there are 'Search' and 'Clear' buttons. A dropdown menu is open over the 'Person Search / Edit' link, showing options: Overview, Person Search / Edit, Report Duplicates, Review Matches, Upload Person Data, and View Upload Results. A black arrow points to the 'Person Search / Edit' option in the dropdown.





Resolve WISEdata Student Errors/Warnings

1. Expand the error to view the student data affected

Clear Grid Filter Expand All Collapse All Export **Errors** Unacknowledged Warnings

	Code	Message	Total
	6631	District of Residence is set to an invalid type of district. As an independent charter school (non-district charter school), you must send a valid District of Residence for all students.	1
			Total: 1

2. Select Details to dig into the student information

	Code	Message	Total														
	6631	District of Residence is set to an invalid type of district. As an independent charter school (non-district charter school), you must send a valid District of Residence for all students.	1														
<table border="1"><thead><tr><th>Aging</th><th>Last Name</th><th>First Name</th><th>WISEid</th><th>School</th><th>Enroll Date</th><th>Action</th></tr></thead><tbody><tr><td>3</td><td></td><td></td><td></td><td></td><td>09/04/2018</td><td></td></tr></tbody></table>				Aging	Last Name	First Name	WISEid	School	Enroll Date	Action	3					09/04/2018	
Aging	Last Name	First Name	WISEid	School	Enroll Date	Action											
3					09/04/2018												

1 - 1 of 1 items

WISEdata Portal feedback

WISEdata Student Detail Features

Demographics

Enrollments

Programs

*Career Education [New Data](#)

Food Service

*Homeless [New Data](#)

*Language Instruction [New Data](#)

*Other [New Data](#)

*Special Education [New Data](#)

*Discipline [New Data](#)

*Roster [New Data](#)

Academic Records [New Data](#)

Demographics

Create Date: 8/26/2019 3:17:40 PM

Last Modified Date: 10/2/2019 1:52:07 PM

Data Element	WISEdata	WISEid
WISEdata & WISEid data element compare related to L2 Validations		
WISEid		
Name*		
Birth Date	9/9/2008	9/9/2008

Data Element	Value
WISEdata data element values only (WISEid system values not presented)	
Birth City	
Birth State	
Birth Country	
Multiple Birth Status	Not Set
Date Entered US	
Visas	

Data Element	Value
WISEdata data element values only (WISEid system values not presented)	
Name Suffix	II
Other Names	
ACCESS for ELLs**	
WISEid Gender	Male
WISEid Race	Black or African American

* Middle name is displayed when present but it isn't used in the L2 WISEdata/WISEid name compare validation
 ** Overall Composite Proficiency Level Score (Prior Year)

[WISEdata Portal feedback](#)

Demographics - School Level

District / Agency	School	Gender	Hispanic Latino Ethnicity	Races	DPI Race/Ethnicity	Disabilities by order	DPI Reporting Disability	DPI Economic Disadvantaged	Limited English Proficiency	Languages	Characteristics
Lutheran Sch	Lutheran Sch	Male	False	Black - African American	B		N	F	7 - Fully English proficient, never ELL/LEP		Economically Disadvantaged

[Student Ed-Fi API View](#)

Enrollments

Enroll Date	Exit Date	District / Agency	School	PrimarySchool	Enrollment Type	Grade Level	Included in 3rd Fri Sept count	Included in Oct 1st Child Count	Overlapping Enrollment
09/01/2019		Lutheran Sch	Lutheran Sch	True	Primary	05	True	False	Not Set

[Enrollment Ed-Fi API View](#)

[Prior Year Enrollments >](#)



Resolve Student WISEid Errors/Warnings

Student	What is entered into your SIS:	What is entered into WISEid:
Data Comparisons	Ed FI (*Middle name not available *)	WISEid
WISEid		
Name	Gabe	Gabriel
Birth Date		
Gender	Male	Male
Race/Ethnicity Category	0005 - H, W	0005 - H, W
Race/Ethnicity Reporting Category	Hispanic/Latino	Hispanic/Latino

1. Use your districts approved documentation to verify student's correct legal name.
 - a. Make changes in your SIS or WISEid to correct error/warning
 - b. Manually sync data after changes are made
2. Race/Ethnicity should be modified according to parent selections.

WISEdata Validation Knowledge Base Articles

You can click the KBA links that follow the validation error or warning listed in the WISEdata Portal (click the info icon) to learn more about the issue and how to correct it.

	Message	Total
	<p>Message Code: 6373 - This enrollment period is totally encompassed within another enrollment period. The enrollment is invalid. The enrollment must either be removed or revised such that it is not encompassed entirely within another enrollment period </p> <p>For submission to DPI, agencies must reconcile entry and exit dates such that no overlap is submitted to DPI. DPI is aware that overlap does occur. In such cases all agencies involved shall cooperate with the following rules prior to submission. This enrollment period is totally encompassed within another enrollment period. The enrollment is invalid. The enrollment must either be removed or revised such that it is not encompassed entirely within another enrollment period.</p> <p>6373 KBA</p>	2



WISEid Help

- [WISEid User Guide](#)
- [WISEid Help](#)
- [WISEid Training Videos](#)
- [WISE User Group](#)
- [WISEdata Annual Tasks Checklist](#)



Stay in Contact

- Join our [Google Currents community](#) to connect with fellow WISEdata users and receive announcements and notifications from DPI and the WISEdata community.
- If you have feedback ideas or want to vote on other's ideas, please use the feedback.dpi.wi.gov site to provide that to us!

