



**SUNS User Guide –
Near Match Resolution Process**

SUNS v2026

Information Technology Office

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South Carolina Department of Education

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Introduction

Purpose of this Document

This guide describes how to use the South Carolina Department of Education’s (SCDE) Student Unique Numbering System (SUNS) for Near Match Resolution. The SUNS application is designed to assign and maintain unique statewide person identifiers (also referred to as “SUNS numbers”). The term “person” is inclusive of Students, Staff Members, and other Person categories.

This guide has been created using the eScholar Uniq-ID® Person ID™ User Guide for guidance and, unless otherwise noted, all screenshots are copyrights of eScholar LLC © 2025 All Rights Reserved by eScholar LLC and were produced using demonstration data.

Points of Contact

For questions or issues, please use the following contact information:

Logins –

1. If an account is needed – see Logging into SUNS - Create an Account
2. If a password is forgotten – see Logging into SUNS – Forgot Password

Support – see [Appendix B – Creating an E-Services Ticket](#)

Requirements

- Member Center access
- SUNS access.

Version Control

Version #	Date	Changes
5.0	08/11/2025	Completely redone to accommodate the SUNS software update from V11 to V2026 and the change in SCDE Branding. Removed Appendices that were no longer needed.
4.0	11/22/2024	Section B: An important note was added regarding early childhood SUNS numbers. Another note was added about using the Master Record not the Resolve Near Matches / Duplicates details page to resolve near matches. This includes looking at the district information to see if the Near Match is on a child entering kindergarten to see if the child was entered by an early childhood partner. Appendix E: modified for districts.
3.0	03/15/2024	Brought up to date to follow SCDE Guidelines. Removed Enrollment instructions, as they are not available in SUNS.

Version #	Date	Changes
2.0	08/15/2022	Reviewed and edited based on changes found necessary during SUNS Early Childhood training. Also updates to SCDE website and Application Web Portal.
1.0	07/27/2020	Original document

SUNS Features

Main Header

The Main Header of the application includes the application name, user information, breadcrumb section, and page actions:



1. **Application Name** - displayed on every page.
2. **User Information** - The User Information section includes the email address, phone number, roles, and groups for the user and a Sign-Out link.
3. **Breadcrumbs** - The breadcrumbs provide the path/location of where the user is in the application and offer clickable links to return to previous pages. For example, Home > Match Options indicates that the user is on the Match Options page.

Side Navigation

The Side Navigation menu provides easy access to all the core functions within the application. The menu can be expanded or collapsed using the > icon.

1. **Home** – Takes the User back to the Home/Dashboard section of the application.
2. **Match Options** – The Match Options component enables users to perform matches. The Match Options page includes a Match Options form section and a Match Results section. The Match Results section is not displayed until a match request is performed.
3. **Search** – Allows the User to search by batch, identifier, agency name, or person name.
4. **Add Person** - Allows users to initiate the Assignment process by submitting records for one person at a time using an online entry form.
5. **Sign Out** - Allows users to Sign Out of the application. By using the Sign Out link, all sessions for the user are closed.



Notes:

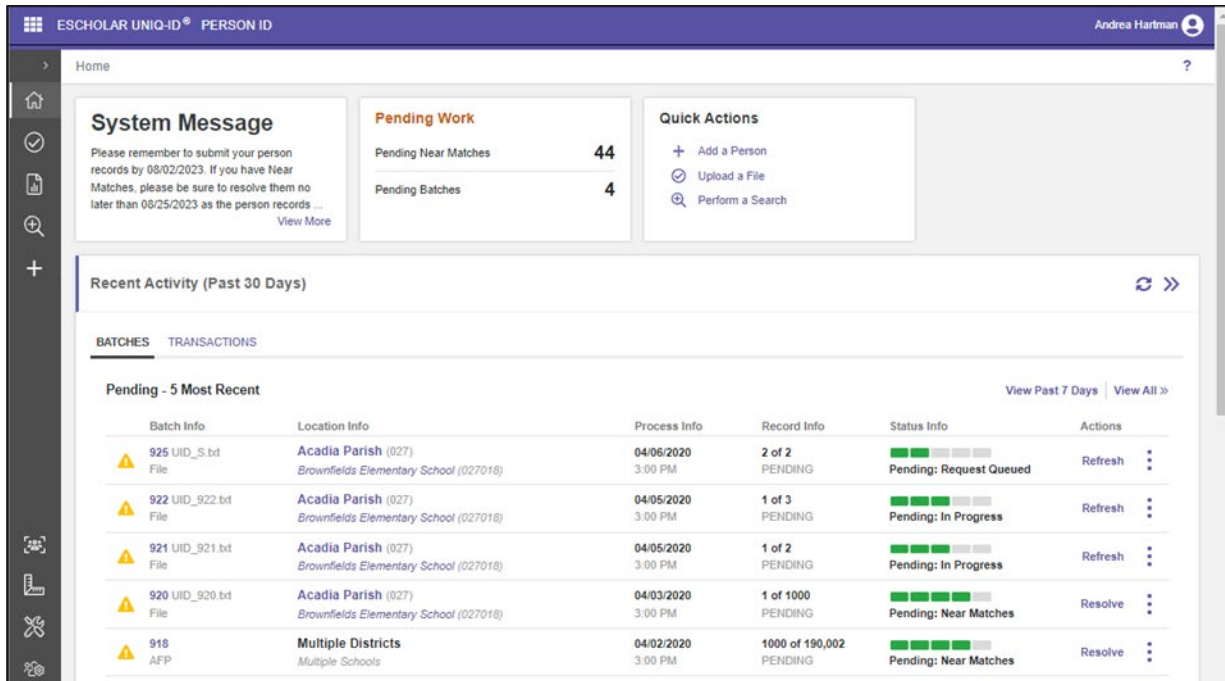
- There could be more icons on the Side Navigation depending on User Role.
- Users should not use REFRESH, BACK, or FORWARD browser buttons with SUNS. Side Navigation and Breadcrumbs are available on every screen.

Home/Dashboard

The Dashboard is the landing page for the application and provides users with quick access to the Transactions/Batches. Once a user successfully logs into the application, the Dashboard/Home Page will be displayed depending on their user role. If a feature is not visible, then the permission to that feature may not be enabled.

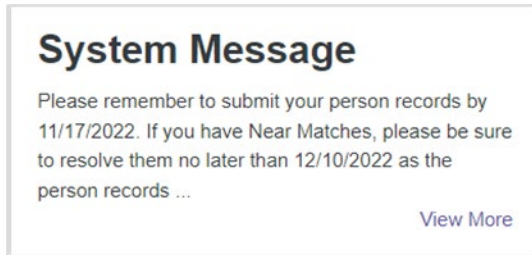
This page enables quick access to recently processed Transactions or Batches and for next steps. From the Dashboard, users can easily access the next steps, such as resolving near matches, downloading data, viewing Transaction information, or reviewing statuses.

The screenshot below displays the Dashboard including the Summary Panel, Recent Activity Panel, Quick Tips Panel, and the actions that are available from this page. Please read each section below for more details.



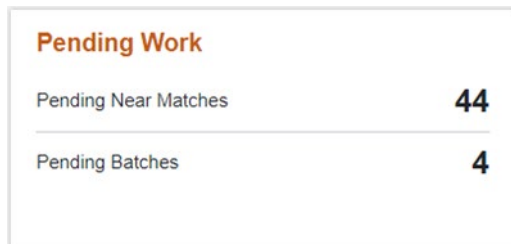
System Message Panel

If there is a System Message from the System Administrator, the System Message panel is shown at the top of the Dashboard. The panel will display up to three lines with no more than 180 characters. Click “View More” to display the entire message in a pop up if it is truncated. If there is no message, this panel will not be displayed on the Dashboard.



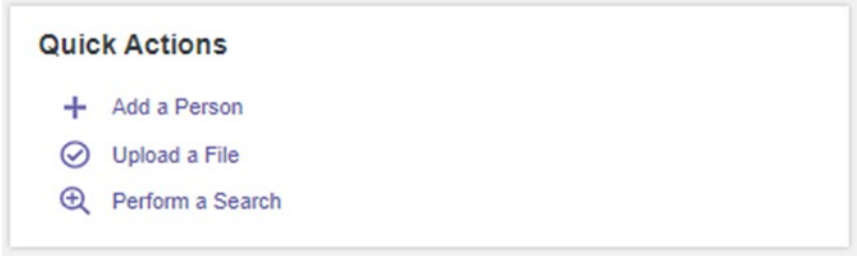
Pending Work Panel

The Pending Work Panel shows a user their pending near matches and batches.




Quick Actions Panel


The Quick Actions panel shows the same navigation options as the left-hand panel.



Recent Activity Panel

Recent Activity displayed on the Dashboard includes a Refresh Action icon, Drill into Action icon, Batch tab, and Transaction tab. The icons let users perform specific actions related to the Recent Activity Panel as described below. The Transaction Tab displays all the individual records that were processed by the application, while the Batch Tab lists all the Batches that were processed by the application.

Refresh icon  - when clicked, the Refresh icon will refresh the Recent Activity Panel with the latest Transactions/Batches and Statuses.

Drill In icon  - when clicked, the Drill In icon will navigate to the Match History page. Refer to the Match History page for more information.

Batches Tab

The Batches tab includes all the Batches the user can access based on their assigned role. The Recent Activity Panel is grouped into two sub-sections:

- 1. **Pending** which is any Batch that does not have a “Completed” status. The 5 most recent are displayed but there are links to View Past 7 Days or View All.
- 2. **Completed** which is any Batch that does have a “Completed” status. The 5 most recent are displayed but there are links to View Past 7 Days or View All.

Recent Activity (Past 30 Days) ↻ >>

BATCHES TRANSACTIONS

Pending - 5 Most Recent View Past 7 Days | View All >>

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
925 UID_S.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	<div style="width: 100%; background-color: #ccc;">█</div> Pending: Request Queued	Refresh ⋮
922 UID_922.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	<div style="width: 100%; background-color: #ccc;">█</div> Pending: In Progress	Refresh ⋮
921 UID_921.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	<div style="width: 100%; background-color: #ccc;">█</div> Pending: In Progress	Refresh ⋮
920 UID_920.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	<div style="width: 100%; background-color: #ccc;">█</div> Pending: Near Matches	Resolve ⋮
918 AFP	Multiple Districts Multiple Schools	04/02/2020 3:00 PM	1000 of 190,002 PENDING	<div style="width: 100%; background-color: #ccc;">█</div> Pending: Near Matches	Resolve ⋮

Completed - 5 Most Recent View Past 7 Days | View All >>

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
1003 Search	Acadia Parish (027) Brownfields Elementary School (027018)	07/27/2022 3:00 PM	1 of 1	<div style="width: 100%; background-color: #28a745;">█</div> Completed	⋮
1002 AFP	East Baton Rouge Parish (017) Multiple Schools	04/06/2020 3:00 PM	1,000 of 1,000	<div style="width: 100%; background-color: #28a745;">█</div> Completed	⋮
1001 AFP	Acadia Parish (027) Multiple Schools	04/06/2020 3:00 PM	2,000 of 2,000	<div style="width: 100%; background-color: #28a745;">█</div> Completed	⋮

Transactions Tab

The Transactions tab includes all individual Transactions the user can access based on their assigned role. The Recent Activity Panel is grouped into two sub-sections:

1. **Pending** which is any Transaction that does not have a “Completed” status. The 5 most recent are displayed but there are links to View Past 7 Days or View All.
2. **Completed** which is any Transaction that does have a “Completed” status. The 5 most recent are displayed but there are links to View Past 7 Days or View All.

Recent Activity (Past 30 Days) ↻ >>

BATCHES **TRANSACTIONS**

Pending - 5 Most Recent View Past 7 Days | View All >>

Transaction Info	Location Info	Process Info	Batch ID	Status Info	Actions
12319 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	922	<div style="width: 100%; background-color: #ccc;">█</div> Pending: In Progress	Refresh ⋮
12316 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	921	<div style="width: 100%; background-color: #ccc;">█</div> Pending: In Progress	Refresh ⋮
12314 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	<div style="width: 100%; background-color: #ccc;">█</div> Pending: Near Matches	Resolve ⋮
12313 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	<div style="width: 100%; background-color: #ccc;">█</div> Pending: Near Matches	Resolve ⋮
12311 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/02/2020 3:00 PM	918	<div style="width: 100%; background-color: #ccc;">█</div> Pending: Near Matches	Resolve ⋮

Completed - 5 Most Recent View Past 7 Days | View All >>

Transaction Info	Location Info	Process Info	Batch ID	Status Info	Actions
12334 Search	Acadia Parish (027) Brownfields Elementary School (027018)	07/27/2022 3:00 PM	1003	<div style="width: 100%; background-color: #28a745;">█</div> Completed	⋮
12333 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	1002	<div style="width: 100%; background-color: #28a745;">█</div> Completed	⋮
12332 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	1002	<div style="width: 100%; background-color: #28a745;">█</div> Completed	⋮

Match History

Clicking View Past 7 Days or View All on either the Batch tab or the Transactions tab will open the Match History page. The Match History page enables users to view all Batches, Transactions, or Rejected Batches that have been processed, refresh the page, filter, sort, and perform actions on the Transactions/Batches.

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
36 DSSCCS Batch 2B N... FILE	DSS (8240) Childcare Scholarship Program (800)	08/21/2025 9:54 AM	1 of 5 PENDING	Pending: Near Match(s/es)	Resolve
30 2301-2025082009000... AFP	GREENVILLE 01 (2301) Multiple Building(s/es)	08/20/2025 9:15 AM	55 of 55 PENDING	Pending: Request Queued	Refresh

The Filter Option on the Match History page enables filtering of the Transactions data grid to help find a specific Batch, Transaction, group of Batches, or group of Transactions. Clicking the Filter Option button will either display or hide the filter fields.

The following filter criteria are available in Filter Options:

1. **Transaction ID** (only on the Transaction tab) - Each Transaction is assigned a unique Transaction identifier. This filter field will restrict the results to the specific Transaction ID entered in this field. To filter on a Transaction ID, enter the ID in the Transaction ID field.
2. **Batch ID** - Each Batch is assigned a unique Batch identifier. This filter field will restrict the results to the specific Batch ID entered in this field. To filter on a Batch ID, enter the ID in the Batch ID field.
3. **Submission Type** - This filter lists all the Submission Type options available to the user. To filter on one or more of the options, click the items in the selection box to the left of the name.
4. **Status** - This filter lists all the Status options for either Batch or Transaction. To filter one or more of the options, click the selection box to the left of the name.
5. **Location**: This filter will list up to 25 locations the user is authorized to view. This filter field also includes a search feature at the top to make finding the correct location easier; enter at least three letters of the name or SIDN in the search field. To filter one or more of the options, click the selection box to the left of the name.

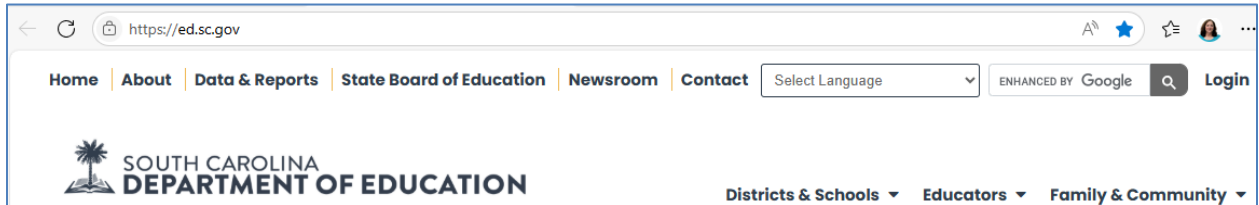
6. **Building** – This filter will list up to 25 buildings the user is authorized to view. This filter option also includes a search feature at the top to make finding the correct location easier; enter at least three letters of the name in the search field. To filter one or more of the options, click the selection box to the left of the name.
7. **Enrollment Year (School Year)** - This filter field is required. If a user wants to use a date range to filter, make sure that all the applicable enrollment years are selected. The Enrollment Year filter will list all the Enrollment Year options. Defaults to the current Enrollment Year. To filter one or more of the options, click the selection box to the left of the name.
8. **Process Data Range** – A user can enter a date range to find all batches or transactions processed within that range using the calendar tools or typing in a date.

When Filter Options section is expanded a Reset link and a Filter Data button will be displayed. To reset the filter criteria, click the Reset link. To filter the data grid based on the selected criteria, click the Filter Data button.

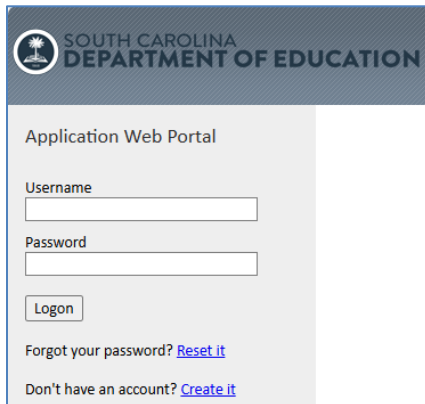
Logging into SUNS

To access the SUNS System, users must first log in to the SCDE Application Web Portal (AWP) fka the SCDE Member Center

1. Go to [the SCDE website](https://ed.sc.gov) and click Login on the right side of the top Navigation bar.

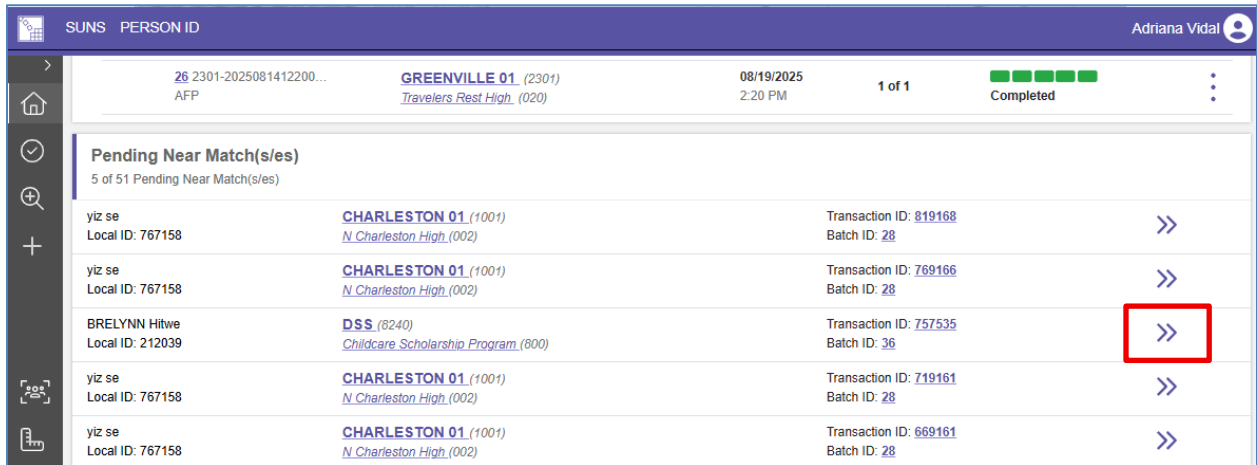


2. This opens the AWP login page. Use the login information provided to log in to the AWP and access the SUNS application.

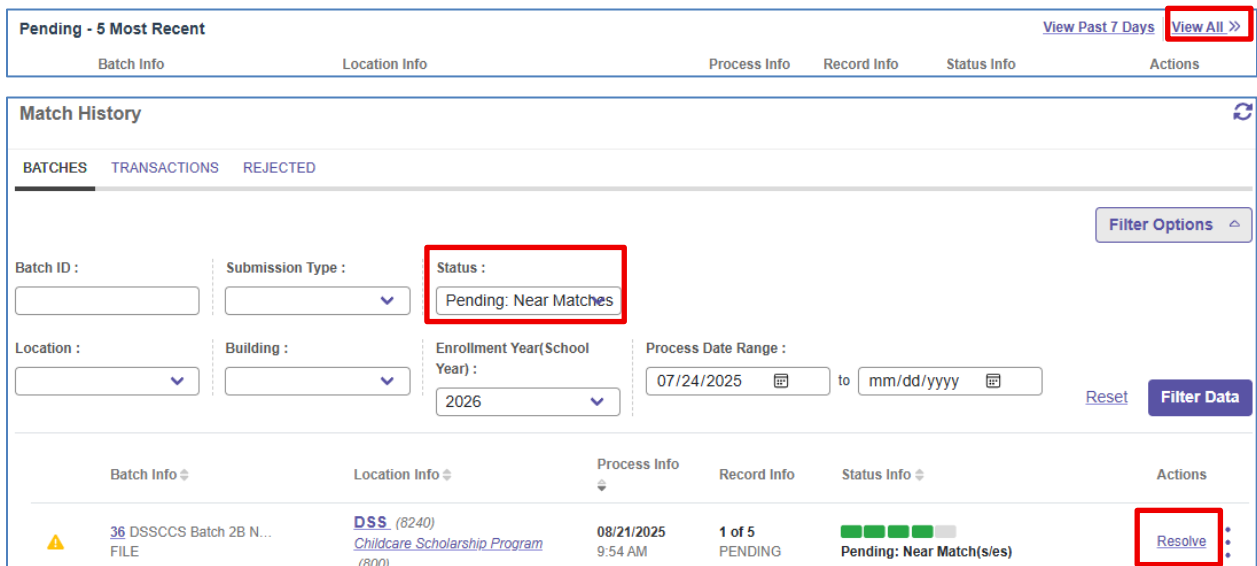


- a. **Create an Account** - If login information has not been provided, click the Create It link next to “Don’t have an account?” underneath the login fields.

- b. **Lost Password** – If the password provided is forgotten or lost, click the Reset It link next to “Forgot your password?”
3. Once logged into the AWP, all available applications and resources will be listed. Locate the SUNS link and click it to open the SUNS application. As a single district user, the AWP will automatically log in to SUNS.
4. The application will open on the SUNS Home/Dashboard. Scroll past the Recent Activity section to get to the Pending Near Matches section. Any batches that need Near Match Resolution will show a Drill In icon >> to the left.



Alternately, a user can click the Pending Activity View All link to get to the Match History page and click the Resolve link in the Actions column next to any batches marked as Pending: Near Matches. The user can filter to only display batches with a Pending Near Match status as well.



Reviewing and Resolving Near Matches

If a Near Match is found, it means that an existing SUNS Master Record is a potential match to the Submission Record. Near Match records can be resolved by deciding whether a record is a Match – assign an ID, No Match – create a new ID, or by canceling the record(s) – remove them from the batch. One batch may have one or many Submission Records in a near match status and one Submission Record may have one or many pending near matches.

When resolving pending near matches, the user is identifying if the Submission Record is the same or different than the pending near matches. To resolve a near match, a user reviews the Submission record against any matching Master records that exist in SUNS and determines whether the Submission Record is a match or not to any potential near matches.

The process of making a near match decision is important to uniquely identifying person records. Users must carefully review the information in detail to ensure correct decisions are being made. The following issues arise from poor near-match decisions:

- **Shared Identifiers** - Matching a submission record to the wrong master record creates a shared identifier. If the submission record is a different person than the one being compared and assigned, then the submission record is linked to the wrong master record, and two different person records will share the same unique identifier. In this case, please alert the System Administrator by submitting an e-Services Ticket so they can review and resolve the identifier issue. (See [Appendix B – Creating an E-Services Ticket](#))
- **Duplicate Records** - Creating a new identifier for a person when there is a match will create a duplicate record. If the submission record is the same person as a master record but the user clicks Create New ID, then the submission record becomes a new record with its own unique identifier. This means the same person has two different unique identifiers and the next time the person is submitted to the application, both records will appear as a near match. In this case, please alert the System Administrator by submitting an e-Services Ticket so they can review and resolve the identifier issue. (See [Appendix B – Creating a SUNS E-Service Ticket](#))

>>> IMPORTANT: Do not assume when reviewing a Near Match on a child entering kindergarten that it is not a match. First Steps Private 4K children have been receiving SUNS numbers for many years and the SLDS FY19 grant is allowing other early childhood partners to receive SUNS numbers. Check the District information under Location/ Enrollment in the master record to see if the child was enrolled in an early childhood program. <<<

The pending Near Matches are accessible from the Dashboard Recent Activity Panel and Match Options component via the Resolve action link/button. When the Resolve link is clicked, the application will navigate to the Near Match List page and then users can access the Compare Near Match page from the list. Near Matches can be resolved from the Near Match List page or the Compare Near Match page.

Near Match List

The Near Match List page will display all pending near matches for the Batch or Transaction, depending on how the user accessed the list. The page includes Near Match List Header, Filter options, and a list of Pending Near Matches.

The screenshot displays the 'NEAR MATCHES FOUND:' header with a warning icon and the text: 'The system found Near Matches which should be reviewed and resolved by a user. Next Steps: Review Near Matches below'. A counter shows '1 Near Matches'. Below the header is a 'Filter Options' section with various input fields: Transaction ID, Batch ID (914), Submission Type, Last Name, Identifier, Identifier Type (State ID), District, School, School Year (2020), Process Date Range (04/06/2020 to), and Sort By (Max Match Score Desc). There are 'Reset' and 'Filter Data' buttons. The main section is titled 'Pending Near Matches' and contains a record for Oliver Jones, Acadia Parish (027), Brownfields Elementary School (027018). The record includes: Date of Birth: 09/23/2001, Race: White, Gender: Male, Social Security Number: 098-12-1133, Local ID: 12345, a 94% Max Match Score gauge, and 4 Potential Matches. Navigation buttons 'Previous', '1', and 'Next' are at the bottom.

Near Match Header

The Near Match Header includes basic information about the Near Matches including how many near matches were found.

The screenshot shows the 'NEAR MATCH(S/ES) FOUND:' header with a warning icon and the text: 'The system found Near Match(s/es) which should be reviewed and resolved by a user. Next Steps: Review Near Match(s/es) below'. A counter shows '1 Near Match(s/es)'.

Filter Options

The Filter Option allows the Near Match List to be filtered based on specific needs, such as Transaction ID, Batch ID, School Year, and others.

This screenshot is identical to the one above, showing the 'Filter Options' section with various input fields and buttons.

Pending Near Matches Section

The Pending Near Matches section will list one Near Match Record panel per Near Match. This allows users to resolve Near Matches or to drill into the Compare Near Match page. It is highly recommended that users drill into the Compare Near Match page to get the most

complete picture of the Near Match. Each panel can be expanded to display all the potential matches for the record.

NEAR MATCH(S)/ES FOUND: The system found Near Match(s/es) which should be reviewed and resolved by a user. 2 Near Match(es)
 Next Steps: Review Near Match(s/es) below

Filter Options

Transaction ID: Batch ID: 242 Submission Type: Last Name: Identifier: Identifier Type: State ID

Location: Building: Enrollment Year(School Year): Process Date Range: mm/dd/yyyy to mm/dd/yyyy Sort By: Max Match Score Desc

Reset Filter Data

Pending Near Match(s/es)

Submission Record Oliver Jones Acadia Parish (027) Brownfields Elementary School (027018)	Date Of Birth: 12 / 15 / 2004 Grade: 09 Local ID: 12345	Race: White Gender: Male Social Security Number: -	Max Match Score	2 Potential Matches	
Submission Record Tetiana Middle Martin GEOG DIST (027) GENEVA CITY SD (430700010000)	Date Of Birth: 12 / 12 / 2004 Grade: 09 Local ID: IN1	Race: White Gender: Male Social Security Number: -	Max Match Score	1 Potential Matches	

1 - 2 of 2 Record(s) Previous 1 Next

Collapsed Panel

Pending Near Matches

Click the down triangle to expand the Near Match data.

Submission Record Oliver Jones Acadia Parish (027) Brownfields Elementary School (027018)	Date of Birth: 09/23/2001 Grade: Undergraduate Local ID: 12345	Race: White Gender: Male Social Security Number: 098-12-1133	Max Match Score	4 Potential Matches	
---	--	--	-----------------	---------------------	--

1 - 1 of 1 Previous 1 Next

Legend

Match Indicators: Near Match (Yellow square)

Decision Icons: Match (Blue checkmark)

Expanded Panel

Pending Near Matches

Click the up triangle to collapse the Near Match data.

Submission Record Oliver Jones Acadia Parish (027) Brownfields Elementary School (027018)	Date of Birth: 09/23/2001 Grade: Undergraduate Local ID: 12345	Race: White Gender: Male Social Security Number: 098-12-1133	Max Match Score	4 Potential Matches	
---	--	--	-----------------	---------------------	--

Potential Matches to Master Data

Person Name	Location	Date of Birth	Grade	Local ID	Race	Gender	Social Security Number	Match Score	Actions
Oliver S Jones (9818404011)	Acadia Parish (027) Crowley High (027743)	09/23/2000	Undergraduate	12345	White	Male			✓ >>
Oliver Jone (9818404111)	Acadia Parish (027) Brownfields Elementary School (027018)	09/23/2000	12		White	Male			✓ >>
Oliver L Jone (9818404122)	Acadia Parish (027) Brownfields Elementary School (027018)	09/22/2000	12		White	Male			✓ >>
Oliver Jone (9818404115)	Acadia Parish (027) Brownfields Elementary School (027018)	09/23/2001	12		White	Male			✓ >>

1 - 1 of 1 Previous 1 Next

Compare Records

The Compare Records page allows users to view a side-by-side comparison of the Submission Record to each potential Near Match. This comparison enables users to make informed Match Decisions by viewing all the data from each record. The Compare Records page includes Compare Records Header and Submission Record details.

The Compare Records page lists the Submission Record and all Near Matches that have been returned by the Matching Process. The differences between the Submission Record and the Near Match are highlighted. Once a user reviews the comparison between the records, a Match or No Match decision can be made, or the record can be canceled.

- The Match decision is made at an individual Near Match record level and will link the Submission Record to the “matched” Near Match Record. All other potential near matches will be canceled when a Match Decision is made.
- The Create ID (No Match) decision is made at the Submission Record level and indicates that none of the Near Matches listed are a match. All Near Matches are canceled and the record is not linked to any Index Records when a Create ID decision is made.
- A Cancel Submission Record decision cancels the entire submission and all related Near Matches that are pending.

The screenshot displays the 'Compare Records' interface. At the top, it shows 'Batch ID: 920' and 'Transaction ID: 12314' with a 'Pending' status. A notification banner reads 'Pending Near Matches Queued' with a sub-message 'A Match Decision is required. Record submitted by ahshdman@escholar.com on 05/13/2021'. Below this, there are four columns: 'SUBMISSION RECORD' (SOURCE: File) and three 'NEAR MATCH RECORD' columns (SOURCE: Master Record). Each Near Match Record shows a 'Match Score' (94%, 87%, and 87% respectively) and a 'Match ID'. Below the records is a 'Matching Fields' table with columns for the Submission Record and the three Near Match Records. The table highlights differences in the 'Middle Name' and 'Last Name' fields for the Near Match Records.

Matching Fields			
First Name	Oliver	Oliver	Oliver
Middle Name	S		L
Last Name	Jones	Jone	Jone
Suffix			

The page displays the Submission Record information in the left column and the Near Match Record information in the right column. If there are multiple Near Matches multiple match columns will be displayed. All fields where the information is different between the two person records are highlighted in the right column.

>> IMPORTANT For children enrolling in kindergarten who have gotten a near match, check the Source Code and the Grade under Location Information in each Master Record to see if the child was enrolled in an early childhood program. Each early childhood program has a different Source Code from the Default Source Code for districts and should be entered as PK for Grade. <<

Resolving the Near Match

1. Navigate to the Near Match List page as described above.

NEAR MATCH(S/ES) FOUND:

The system found Near Match(s/es) which should be reviewed and resolved by a user.
Next Steps: Review Near Match(s/es) below

2

Near Match(es)

Filter Options

Transaction ID:

Batch ID:

Submission Type:

Last Name:

Identifier:

Identifier Type:

Location:

Building:

Enrollment Year (School Year):

Process Date Range: to

Sort By:

Reset
Filter Data

Pending Near Match(s/es)

Submission Record	Date Of Birth	Race	Max Match Score	Potential Matches
Patel Jay <small>RCC WAYNE FINGERLAKES/WFL/EDUTECH (439000910000)</small> <small>NEW YORK STATE SCHOOL FOR THE BLIND (180300871197)</small>	12 / 15 / 2004	White	100%	2
Ray Susakim <small>RCC WAYNE FINGERLAKES/WFL/EDUTECH (439000910000)</small> <small>NEW YORK STATE SCHOOL FOR THE BLIND (180300871197)</small>	12 / 12 / 2006	White	95%	1

1 - 2 of 2 Record(s)
Previous
1
Next

2. Review the Resolve Near Matches list page. Each card displays the submission record, and the collapsible section displays a list of Potential Matches.
3. Focus on one Submission Record at a time.
4. Click the Expand icon () in the Submission Record header to expand the Potential Matches section.

NEAR MATCHES FOUND:

The system found Near Matches which should be reviewed and resolved by a user.
Next Steps: Review Near Matches below

1

Near Matches

Filter Options

Transaction ID:

Batch ID:

Submission Type:

Last Name:

Identifier:

Identifier Type:

District:

School:

School Year:

Process Date Range: to

Sort By:

Reset
Filter Data

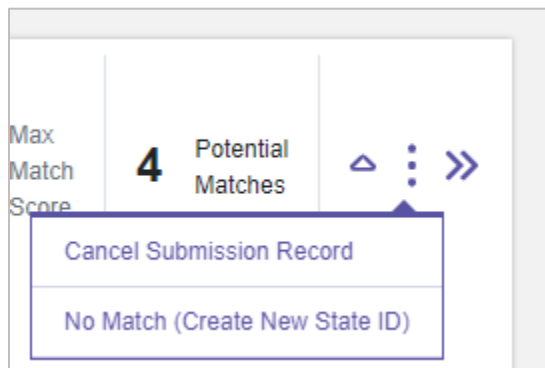
Pending Near Matches

Submission Record	Date of Birth	Race	Max Match Score	Potential Matches
Oliver Jones <small>Acadia Parish (027)</small> <small>Brownfields Elementary School (027018)</small>	09/23/2001	White	94%	4

Potential Matches to Master Data

Person Name	Location	Date of Birth	Grade	Local ID	Race	Gender	Social Security Number	Match Score	Actions
Oliver S Jones <small>(9818404011)</small>	Acadia Parish (027) Crowley High (027743)	09/23/2000	Undergraduate	12345	White	Male		94%	✓ >>
Oliver Jone <small>(9818404111)</small>	Acadia Parish (027) Brownfields Elementary School (027018)	09/23/2000	12		White	Male		87%	✓ >>
Oliver L Jone <small>(9818404122)</small>	Acadia Parish (027) Brownfields Elementary School (027018)	09/22/2000	12		White	Male		87%	✓ >>
Oliver Jone <small>(9818404115)</small>	Acadia Parish (027) Brownfields Elementary School (027018)	09/23/2001	12		White	Male		87%	✓ >>

5. The Potential Matches section will display one or many Near Matches with many of the matching fields visible in the list and the Match Score. The list will be sorted by the highest matching record at the top of the list based upon the Match Score.
6. Review the Potential Matches section as compared to the Submission record to determine if there are any Matches or if there are no Matches (No Match).
 - a. If there are no matching records to the Submission Record in the Potential Matches to Master Data section, click the multiple action icon in the Submission Record header to the right of the Submission Record details then click the 'No Match (Create New State ID)' link on the dropdown. NOTE: If the No Match link is clicked, ALL potential Near Matches will be discarded. This decision should only be made if there are no matches listed in the Potential Matches to Master Data section.



- b. If the record is a Match to the Submission Record, click the Match icon (✓) in the Actions column to the right of the potential match record to be matched.
 - c. This is the preferred method of Near Match Resolution - click on the Drill In icon (>>) to navigate to the Compare Records page. This icon can be clicked from the Submission Record Header or from the Potential Matches to Master Data section, both options will navigate to the same page.
7. The Compare Records page displays the submitted person in the "Submission Record" column on the left and the Near Match Record(s) in columns on the right of the submission record column.

Cancel Submission Record **No Match**

SUBMISSION RECORD
SOURCE: File

NEAR MATCH RECORD
SOURCE: Master Record

94%
Match Score

Match: ID 981840411

Update Master:

NEAR MATCH RECORD
SOURCE: Master Record

87%
Match Score

Match: ID 981840411

Update Master:

NEAR MATCH RECORD
SOURCE: Master Record

87%
Match Score

Match: ID 9818404122

Matching Fields	!	!	!
First Name Oliver	Oliver	Oliver	Oliver
Middle Name	S		L
Last Name Jones	Jones	Jone	Jone
Suffix			
Alternate Last Name			
Gender Male	Male	Male	Male
Date of Birth 09/23/2001	09/23/2000	09/23/2000	09/22/2000
Social Security Number 098-12-1133			

- a. The Near Matches will be listed from left to right, with the highest likely match to the left and closest to the Submission Record.
 - b. All fields that are different between Submission Record and Near Match Records are highlighted in yellow.
 - c. If a near match was forced by the application, the application will list the reason for the near match within the “Match Notes” row. This may include a note about the Twins Rule, SSN Rules or other forced near match scenarios.
8. If more than three Near Matches are available, the application will display a left and right navigation icon. Click the icons to navigate between all the potential matches.
 9. Review all Near Matches, including the highlighted differences and Match Score to determine if there is a Match or if there are no matches (No Match).

NOTE: A Near Match is only resolved once, so once a decision button (Match, No Match or Cancel) is clicked, the Near Match is resolved and will disappear from the Near Match List. Once a decision is submitted, it cannot be reverted.
 10. To resolve a near match a user can click on Match, No Match, or cancel the record.

Pending Near Matches Queued
 A Match Decision is required.
 Record submitted by ahartman@scholar.com on 05/12/2021

View Pending Near Match List
 View Transaction Details

Cancel Submission Record **No Match**

SUBMISSION RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD
SOURCE: File	SOURCE: Master Record	SOURCE: Master Record	SOURCE: Master Record
	94%	87%	87%
	Match Score	Match Score	Match Score
	Match: ID 9818404011	Match: ID 9818404111	Match: ID 9818404122
	Update Master: Yes No	Update Master: Yes No	
Matching Fields			
First Name	Oliver	Oliver	Oliver
Middle Name	S		L
Last Name	Jones	Jone	Jone

- If there are no matching records to the Submission Record in the listed Near Matches, click the No Match button (**No Match**). NOTE: If the No Match button is clicked, ALL potential Near Matches will be discarded. This decision should only be made if there are no matches listed in the Near Match details.
- If the Near Match Record is a Match to the Submission Record, click the Match button (**Match: ID 9818404011**) in the Near Match column below the record to be matched. The Match button will include the State ID of the Near Match (Index Record).

If the submission record matches the master record and the user has authorization to update the master data, the final field available on the Compare Person screen may be the Update Master selection. It is also available at the top of the Compare screen under the Match button. This option will only be applied to the record if the Assign Selected match decision button is clicked.

SUBMISSION RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD
Source: AFP	Source: Master Record	Source: Master Record
	94%	91%
	Match Score	Match Score
	Match: ID 3501840381	Match: ID 8957258442
	Update Master: Yes No	Update Master: Yes No

- Option “No” – The submission record will be assigned when the “Assign Selected” button is clicked, but the master data will not be updated with the submission record information.

- Option “Yes” – The submission record will be assigned when the “Assign Selected” button is clicked, and the master data will be updated with the submission record information. When the master record is updated, the original data is moved to history so there is a record of that movement/update.


The default selection is Yes so users must make sure they want this option when clicking Assign Selected. Matching a submission record to the wrong master record creates a shared identifier as noted in the beginning of this section. ([Reviewing and Resolving Near Matches](#))

- If the Submission Record should be canceled, click the “Cancel Submission Record” link.

NOTE: When the Cancel Submission Record link is clicked, all the pending near match will be canceled. If a pending Near Match is canceled, no match determination is made, and the record must be resubmitted to the application.

Downloading IDs

Once the batch has been uploaded, errors fixed, data validation completed and near matches resolved, the home page will display the status of the batch as “Completed” and Actions will just display three dots.

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
144 2301-2026052712200... AFP	GREENVILLE 01 (2301) <i>Collins Sara El</i> (044)	05/27/2026 12:20 PM	2 of 2	 Completed	⋮

To download the IDs for the batch, users should perform the following steps:

1. Click the three dots under Actions to open the options menu. Options are Download and View Transaction.
2. Click Download button and the system will take you to the Batch Profile page.
3. Under Download Options, click the Generate Extract button and an Extract File will be generated.
4. Click Refresh under the Extract file Actions to get the Download link.

Match Status

Status	Submission Date	Downloadable Record Count	Total Record Count
IDs Assigned (Match / No Match)	05/27/2026 12:20PM	2	2

Format

Download Type: **Simple** Advanced

[Generate Extract](#)

Extract File (1)

Extract Date	Location Info	Record Count	Extract Name	Extract Status	Actions
05/28/2026 12:33PM	GREENVILLE 01 (2301) Collins Sara El (044)	2 of 2	PID_BATCHPROFILE_144_05282026_1233PM_IDRES.TXT	Completed	Download

- The downloaded file will match the record that was uploaded but include the ID that was assigned to that person along with .

Search > Person

Users can search for person records online by clicking Search in the left sidebar navigation or Perform a Search link under Quick Actions on the Home screen.

Home

System Message
Welcome to SUNS v2026 Test/Training! Explore the new Home/Dashboard features!

Pending Work

Pending Near Match(s/es)	7
Pending Batches	11

Quick Actions

- [Upload a File](#)
- [Perform a Search](#)
- [Add a Person](#)

This feature allows users to:

- Search for Person records online by Master Record, History, or Submission.
- View Person information.
- Edit Person information
- Add a Person note.
- View Person notes.

1. **Search by Person:**

- Click Search in the left sidebar navigation or Perform a Search link under Quick Actions on the Home screen to open the Search Options screen. There are Quick tips on the right side that change depending on the tab you select.

- b. Click on the appropriate search tab. This module has four types of searches available: Person, ID, Location, File. We are only focusing on Person.

The screenshot shows the 'Search Options' interface. At the top, there are four tabs: 'BY PERSON', 'BY ID', 'BY LOCATION', and 'BY FILE'. The 'BY PERSON' tab is active. Below the tabs, there are three sections: 'Search Settings', 'Person Information', and 'Quick Tips'.
 In the 'Search Settings' section, there are three rows of buttons:
 - 'Search In': 'Master' (selected), 'History', 'Submission'
 - 'Match Method': 'Matching Engine' (selected), 'SQL'
 - 'Search Rule': 'Early Childhood Rule', 'Student Rule' (selected)
 In the 'Person Information' section, there are several input fields:
 - 'First Name': 'John'
 - 'Middle Name (optional)': empty
 - 'Last Name': 'Kurtz'
 - 'Suffix (optional)': empty
 - 'Date Of Birth (optional)': 'mm/dd/yyyy' with a calendar icon
 - 'Gender (optional)': 'FEMALE', 'MALE', 'Non-Binary'
 At the bottom right of the form, there are 'Reset' and 'Search' buttons.
 The 'Quick Tips' section on the right contains information about search fields, match methods, search in options, and results.

- c. **By Person** allows users to search for a person using basic demographic information. Default settings are Search In = Master, Match Method = Matching Engine, Search Rule = Student
- i. Under Person Information enter First Name and Last Name at a minimum as these are required fields.
 - ii. Click the Search button for results. The application will display the results of the search. When one or more person records are found, the application displays the matching records. The match probability will be displayed if the default Matching Engine match method is left. The closest match displays as the first result in the list.
 - If searching without a birthdate, the search results will come back with just a percentage in the Match Probability column.
 - If searching with a birthdate, the search results will come back with a percentage and Match or Near Match in the Match Probability column.
 - Results could include a “No Records Found” status. If no matches are found for the search criteria, the application displays a message under the search form. When this occurs, adjust the search criteria if necessary and click the Enter New Person button.
2. **View Person Information** - Once Search Results are returned, a User can view detailed information about the person.

Search Results + Add New Person

Filter Options ^

Person Type: Grade: Location: Building:

Reset Filter Data

State ID	Name	Date Of Birth	Gender	Ethnicity Indicator / Race	Social Security Number	Grade	Location Info	Local ID Info	Person Type	Match Score	Actions
7146815951	Kurtz, John	06/02/2011	MALE	Non-Hispanic White		Kindergarten	GREENVILLE 01 (2301) Collins Sara E (044)	527635 Default	Student	85%	>>

Legend

Match Indicators

■ Match ■ Near Match

- a. Click on the Name hyperlink of the record to open the Person Information page.
- b. The Person Information page displays the person’s Overview with links to Master Record, History Record, and Associated Record.
 - i. **Overview** displays the Master Record Highlights, Person ID Pending Near Matches (if any), Recent Notes (if any), Alias ID, and Recent History Records.
 - ii. **Master Record** displays Person Information, Contact Information, Other Information, Customer Defined Fields, Location Information, Notes, Matching Information, and Transaction Information.
 - iii. **History Record** – View additional History information for that person record.
 - iv. **Associated Record** - Displays any additional Person information that has been retired and associated to that person record, if any.
3. **Edit Person Information** – On the Person Information page, a User can also edit a person record without uploading a Batch file. (See [Search > Person](#) for detailed instructions to get to the Individual Person Information page.)

- a. Perform a Person Search for the Person to be edited.
- b. Click on the hyperlinked name to open the Person Information page.
- c. Either click the drill in icon on the Master Record Highlights box or click the Master Record link to open the Person Details page.
- d. Click the edit icon on the Person Details panel.

- e. Make changes as needed and click Update to save.

Ethnic Sub Group (optional)

State ID 95828-71-644

Cancel Update

Click Update

f. Repeat the process for each additional section to edit. Remember, the user must drill into the section panel first then click the edit button.

4. **Add a Person Note** - On the Person Information page, a user can also add notes to a Person Record. (See [Search > Person](#) for detailed instructions to get to the Individual Person Information page.)

a. Perform a Person Search for the Person to be edited.

b. Click on the hyperlinked name to open the Person Information page.

c. Click on the Master Record link and scroll to the Notes section. Click on the plus sign in the top right corner of the Notes section to add a note

Notes +

d. Click Add Note to save the note.

Add Note

Note Date 05/28/2026

Created By Vidal, Adriana

Type Admin

Note

Cancel Add Note

e. The system will take you back to the Master Record page, scroll to see the note –

Note Date	Created By	Type	Note
05/28/2026	Vidal, Adriana	Admin	Test Note

1 - 1 of 1 Record(s) Previous 1 Next

5. **View Person Notes** - On the Person Search Individual Person Information page, a User can also edit a person record without uploading a Batch file. (See [Search > Person](#) for detailed instructions to get to the Individual Person Information page.)

- a. Perform a Person Search for the Person to be edited.
- b. Click on the hyperlinked name to open the Person Information page.
- c. If there are notes you can view them on the Overview page or click the Master Record link.

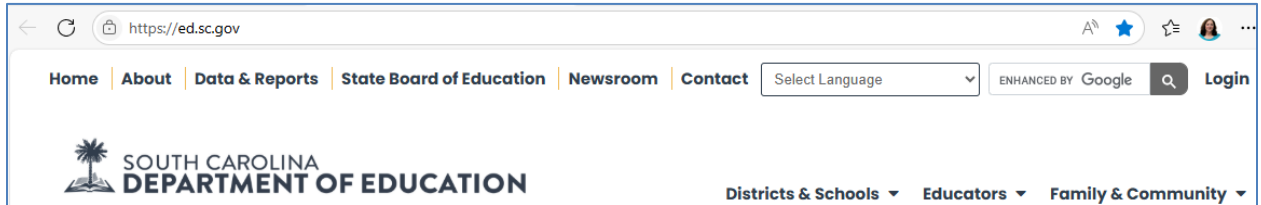
Appendix A – Definitions, Acronyms, and Abbreviations

ITEM	DEFINITION/MEANING
AFP	This is used throughout the document to reference Automatic File Processing.
Assign Selected	This button is available within the Near Match pages. The label on the button may vary by application. It may also be labeled Match.
CDF	This is used throughout the document to reference Customer Defined Fields.
Create New ID	This button is available within the Near Match pages. The label on the button may vary by application. It may also be labeled No Match.
eScholar UniqID®	eScholar UniqID® is the name of the application from eScholar.
History Record	When a master record is updated, the original data is moved to history, and the new data becomes the master data. The application retains all History information for a person. Typically, data is updated when a record is submitted, unless the Authoritative Source feature is enabled.
ID Assignment Process	The SUNS process of assigning IDs to person records. This process includes the following steps: (1) submitting a batch (2) validating the data (3) fixing data errors (4) assigning IDs (5) resolving near matches/matches (6) downloading IDs.
Local ID	The identifier that is created by the source of the data. For example, if the data is generated by the SIS, the Local ID would be the internal identifier created by that SIS.
Master Data	This is the active record for the person and includes the ID and all the latest data.
Match Probability	The probability that two person records are the same person.
SIS	Student Information System.
SLF	Student Locator Framework using SIF
SUNS	The SUNS abbreviation is used throughout this document and stands for Student Unique Identification System.
SUNS Number	The internal person identifier generated by SUNS
Upper and Lower Near Match Thresholds	Application-level properties that will help determine match decision classification. The value for each property must be between 88 and 93

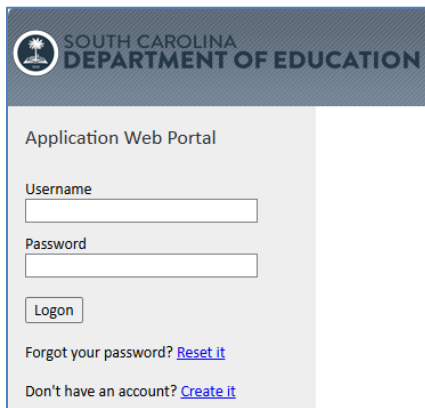
Appendix B - Creating a SUNS eservice Ticket.

To create a SUNS eService ticket, users must first log in to the SCDE Application Web Portal (AWP) fka Member Center

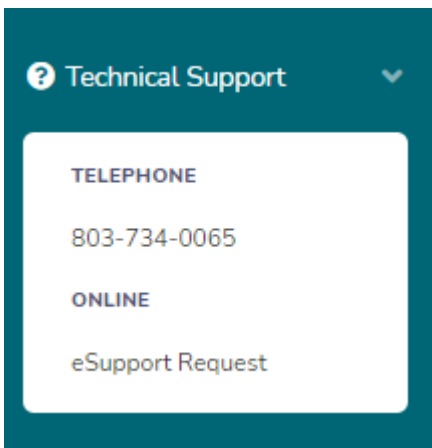
1. Go to [the SCDE website](https://ed.sc.gov) and click Login on the right side of the top Navigation bar.



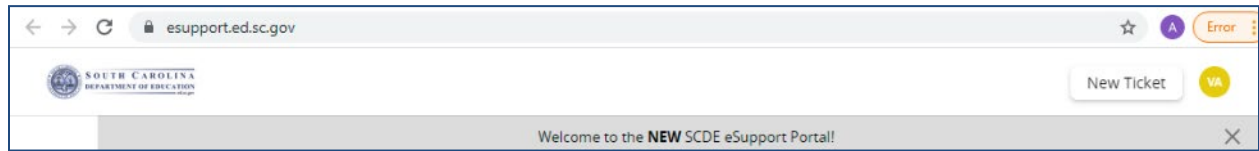
2. This opens the AWP login page. Use the login information provided to log in to the AWP and access the SUNS application.



- a. **Create an Account** - If login information has not been provided, click the Create It link next to “Don’t have an account?” underneath the login fields.
 - b. **Lost Password** – If the password provided is forgotten or lost, click the Reset It link next to “Forgot your password?”
2. Once logged in to the AWP, click the dropdown arrow next to Technical Support in the left Navigation menu and select eSupport Request.



3. The SCDE eSupport Portal page will open. Click the New Ticket button at the top of the page.



4. Enter all the required fields. Required fields are in Red with an asterisk (*).
 - a. Requestor (Email or Name) * - prefilled from login.
 - b. Subject* – a very brief description of the issue.
 - c. Description – not required but always helpful. A more detailed description of the issue. There is the option to attach a file using the paperclip icon under the Description box.
 - d. Category* – Select Applications
 - e. Subcategory* – Select SUNS –Student Unique Numbering System
 - f. CC – add additional email addresses if you need the ticket responses to go to additional people.
 - g. Application Details* - the choices are Grant/Remove Access and Technical Support. Please note: Access to the SUNS application can only be granted if training has been completed and a certificate is on file.
5. Click the Create button at the bottom right side of the screen to submit the eSupport ticket.

New Ticket

Requester (Email or Name) *

Vidal, Adriana

Subject *

SUNS Issue

Description

I'm having a problem uploading a file.

Aa



Category *

Applications

Subcategory *

SUNS - Student Unique Numbering System

CC

Application Details *

Technical Support

Cancel

Create

Appendix C – SUNS Matching Logic

Matching Overview

During the matching process, the SUNS matching engine completes a three-step process:

1. searching / indexing.
2. scoring; and
3. producing a decision.

In the first step, the matching engine searches the Master database and builds a highly compressed index. The highly compressed index is generated using the first name, last name, and middle name. Using a simplified phonetic representation, the system generates an index for each student being matched and utilizes processing rules, such as mixed usage, spelling errors, nicknames, or multi-part, to find name combinations for the index. These algorithms with phonetic and spelling correction allow for variations in the data. For example, if the name Amelia Jenna Cathcart is passed to the matching engine, along with the other required fields, the index for this could include the following combinations:

Amelia Jenna Cathcart
Jen Amelia Cathcart
Amelia J Cathcart
Cathcart Amelia Jenna

This allows the search portion of the matching engine to account for the transposition of names, missing data, data errors, and data variations. Because the system utilizes this index, rather than querying against the entire table for each piece of matching logic, the performance of the match is improved. Once the index is created, the matching engine proceeds to the scoring phase of the process and performs additional matching logic /algorithms on the index to find the matching scores.

When processing through the logic, the matching engine uses the name, birth date, social security number, and gender for matching. Each field is assigned a weight that helps determine the final Match Score. The Field Weight Scores are as follows:

Field Weight	Score
Name (First Name, Middle Name, Suffix and Last Name)	High
Social Security Number	Medium *
Birth Date	Medium
Gender	Low

Based upon the weight and the probability of the match, the system assigns the Match Score.

Matching Outcomes

Once the matching engine has analyzed the incoming record, it returns the Match Score as described above. This score is always between 0 and 100. In addition to the matching processing logic, additional configuration and/or business rules may be applied to the data to determine the matching outcome. This includes the Near Match Threshold settings in the System Properties, Twins Rule, and Social Security Number Rules. For more details about these items, please refer to the Match Configuration & Rules section below. Based upon the Match Score, Near Match Thresholds, and other business rules, the SUNS application generates one of three matching outcome decisions: Match, Near Match, or No Match.

Match

A record will be classified as a Match if the Match Score is above the Upper Near Match Threshold. In this case, the system will compare the input record to the master record to determine if updates to the data are required. If the data is different, the system will update the master record with the added information and move the old master record to history.

Near Match

A record will be classified as a Near Match if the Match Score is above the Lower Threshold and below the Upper the Threshold, the Twins Rule and Social Security Number Rule apply, or multiple matches/near matches are found for the same record.

No Match

A record will be classified as a No Match if the Match Score is below the Lower Threshold.

Matching Fields

First Name

First Name is a **required** field and has a weighting of High as part of the Name.

Examples of business rules for this field:

- First Names match/differ.
- Nicknames/Abbreviations
- Middle Name is included in the First Name field.
- Last Name and First Name are transposed.
- First Name spelling variations (e.g., Christine vs. Christina)
- Multi-part names
- Spelling errors (e.g., John vs Jonh)
- Uncommon name leniency

Last Name

Last Name is a required field and has a weighting of High as part of the Name.

Examples of business rules for this field:

- Last Names match/differ.

- Suffix is included in the Last Name field.
- Last Names that sound the same but are spelled differently.
- Last Name and First Name are transposed.
- Last Name overlap (e.g., Peters vs. Peterson)
- Multi-part names
- Uncommon name leniency

Alternate Last Name

Alternate Last Name is an optional field and has a weighting of High as part of the Name. It is passed to the matching engine as a Last Name.

Examples of business rules for this field:

- Last Names match/differ.
- Suffix is included in the Last Name field.
- Last Names that sound the same but are spelled differently.
- Last Name and First Name are transposed.
- Last Name overlap (e.g., Peters vs. Peterson)
- Multi-part names
- Uncommon name leniency

Middle Name

Middle Name is an optional field and is part of the Name.

Examples of business rules for this field:

- Middle Names match/differ.
- Nicknames/Abbreviations
- Middle initial (John Thomas Smith vs. John T Smith)
- First Name is included in the Middle Name field.
- Middle Names spelling variations.
- Multi-part names

Suffix

Suffix is an optional field and is part of the Name.

Examples of business rules for this field:

- Suffixes match/differ.
- Last Name and Suffix are transposed.
- Variations (II or I I)

Social Security Number

Social Security Number (SSN) is an optional field and should have a Medium/Low weighting. The SUNS application is configured to not store SSNs, so they are not used for matching.

Examples of business rules for this field:

- Social Security Numbers match/differ.
- Social Security Numbers are close (e.g., 123-45-#### vs. 123-44-####).
- If the Social Security Number is provided, the system assigns a weighting of Medium, but if it is not provided it has a weighting of Low.

Gender

Gender is a required field and has a Low weighting.

Examples of business rules for this field:

- Genders match/differ.

Date of Birth

Date of Birth is a required field and has a weight of Medium.

Examples of business rules for this field:

- Dates of Birth match/differ.
- Two-part date matches. When two out of the three elements (month, day, year) are the same, it increases the match probability.

Matching Rules

Twins Rule

This is a Custom Field in the SUNS application.

Conditions:

- The decision has to be a Match.
- The School Districts must be the same.
- Local Student IDs (identifiers for the School District) must be different.

Action:

- Ignores match decision.
- Transforms the match pair into a Near Match.

Multiple Matches

Conditions:

Two matches or near matches exist for the incoming record.

Action:

- Ignores match decision.
- Transforms the match group into a Near Match.

Back-to-Back Matches

Conditions:

- Two records with the same last name, first name and date of birth as another record in the same file.
- The decision outcome is a No Match.

Action:

- Ignores match decision.
- Transforms the match group into a Near Match.

Exact Match Rule

If a State ID is submitted with the record, the system passes the record through the Exact Match Rule. The process is as follows:

- The application compares the submitted State ID to existing valid State IDs.
- If the State ID is valid, the application compares the fields configured in the Exact Match Rule.
- If there are any differences in those fields, the application will send the record through the normal match process and will produce Near matches.
- If there are no differences in those fields, the application bypasses the matching engine and will update the master record.

If the State ID is not passed or there was no Exact Match, all information is passed to the Match Engine (First Name, Last Name, Middle Name, Suffix, Gender, SSN and Birth Date).