

Center for Educational Performance and Information

Institution of Higher Education Request for Unique Identification Code User Guide

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Contents

Introduction	4
Background.....	4
Help and Resources.....	4
Acquiring UICs for Postsecondary Schools	5
IHE Request for UIC Collection Overview.....	6
Timeline.....	6
Checklist for Obtaining UICs	7
Gaining Access to MSDS	8
Tips for Gaining Access to MSDS	8
Removing Access to MSDS	8
XML File Creation	9
Searching for Your Entity Code	10
Logging in to MSDS.....	11
Navigating the MSDS Home Page.....	12
Menu	12
Screen-Level Help	13
Characteristic-Level Help.....	13
Submitting Records in the IHE Request for UIC Collection	14
Uploading a file	14
Checking Your File’s Status.....	16
Reviewing Records.....	20
UIC Resolution.....	21
UIC Resolution Scenarios	23
Scenario #1 Multiple Possible Matches	23
Scenario #2 One Possible Match.....	23
Requesting to Link UICs.....	24
Requesting to Unlink UICs.....	25
Manage Requests for UICs	26
Manage Linking Requests.....	29
Downloading Files	31
Manually Entering Student Data.....	34
To Add a Student	35
Student Search.....	37

Appendix A: Download XML Sample with UIC Field Added 40

Introduction

The purpose of this guide is to provide training for the Institution of Higher Education Request for Unique Identification Code Collection in the Michigan Student Data System application. This guide includes directions for gaining access to MSDS and using MSDS to upload files, performing UIC Resolution, requesting to link UICs, downloading reports, and using the system's additional functionality such as manual data entry or Student Search features.

Background

One of CEPI's foundational purposes is to connect preschool through workforce data. Connecting these data requires that UICs are assigned and maintained.

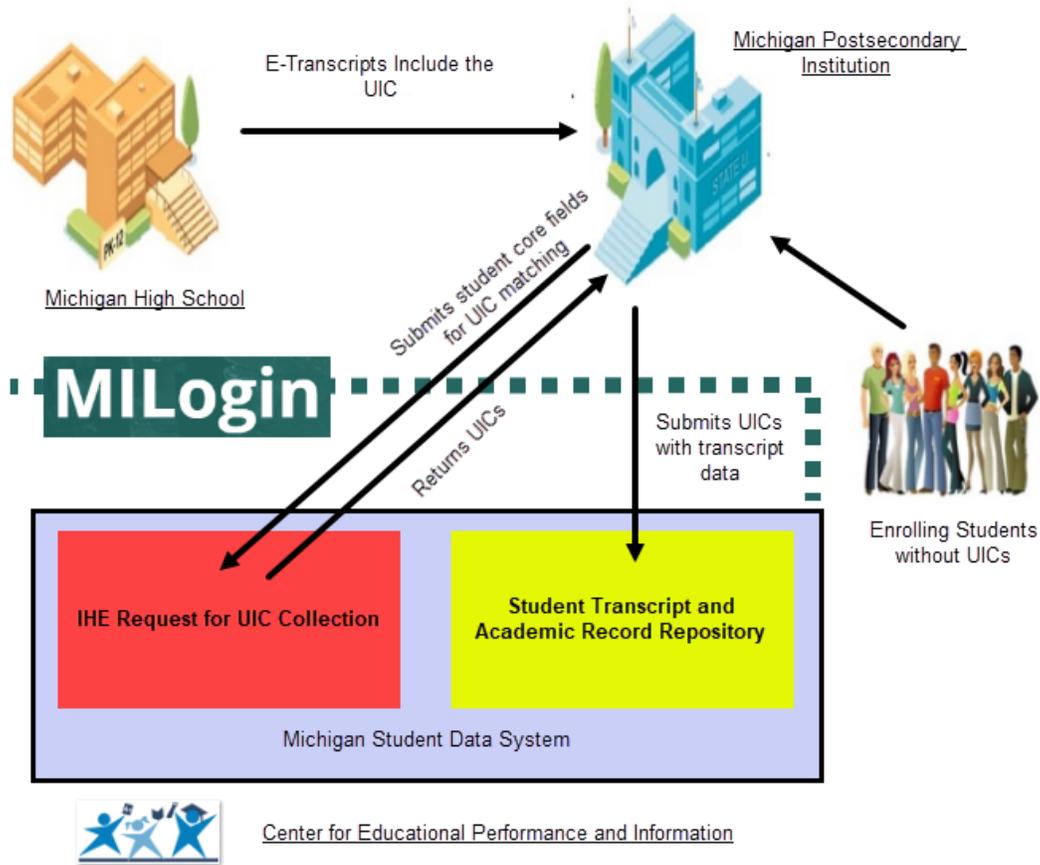
CEPI manages the exchange of data among institutions to the state and uses the data for reporting at all education levels. Before student transcript data can be uploaded to the Student Transcript and Academic Record Repository Collection, each enrolled student must have a UIC.

Transcripts are currently sent electronically from high schools to IHEs from a transcript exchange service provided by Parchment. These transcripts contain UICs. For students who are enrolled in your institution, but for whom you do not have a UIC, CEPI has created the IHE Request for UIC Collection in MSDS. The IHE Request for UIC Collection may also be utilized to validate UICs for students for whom you do have a UIC, or to update the demographics associated to the UIC. To validate a UIC or to update demographics on a UIC, the UIC must be submitted along with the demographics. Validating your students' UICs in the IHE Request for UIC Collection could help reduce the number of records that require resolution when submitting to STARR.

Help and Resources

If you have questions not covered by this manual and our other posted support material, please contact our customer support team at cepi@michigan.gov. Email allows us to better research and respond to your questions, but if email is not an option, you can call us at 517-335-0505 x3.

Acquiring UICs for Postsecondary Schools



Important Information on UICs

Acquiring UICs at Student Enrollment

It is best practice to acquire and assign UICs at student enrollment. Early acquisition of UICs enables the integration of student level data across state systems (e.g., MiSSG and STARR). This is especially important in enabling the state to assist in completing compliance reporting requirements in support of various college grant programs.

Ensuring Primary UIC is in Student Information System

When an entity submits a UIC into a collection or reruns resolution, the matching process may replace it with a primary UIC in the collection. This can occur when the submitted UIC has previously been linked and is now a secondary UIC. Please refer to the List of Changed UICs Report, a point-in-time report, in the IHE Request for UIC and the STARR collections to ensure the primary UIC is listed in your student system. This report is found in the staging area under UIC Resolution Reports.

Validating UICs/Updating Demographics

The IHE Request for UIC Collection may be used not only to assign and create identifiers, but also to validate UICs or to update student demographics. When validating UIC information, or updating a UIC's demographic information, it is essential the UIC is submitted with the student record to avoid a new UIC from being created. It is important to note when a submission record matches to an existing UIC record, an update will occur if there are demographic differences between the records. If it is not your intention to update the UIC record, utilize the student search instead to validate a UIC.

IHE Request for UIC Collection Overview

The IHE Request for UIC Collection is the means for IHEs to acquire UICs for currently enrolled students who do not have UICs. It is also used to validate UICs for students who already have them and to update person demographic information.

During the designated timeframe, the authorized staff member at the IHE will upload an XML file containing the necessary student information to MSDS to match against those records in the MSDS UIC master table. If an existing UIC is found, it will be associated with the student record; if no match is found, a new UIC will be created for the student. If possible matches exist, they will be presented to the user to decide which UIC should be associated with the student. The file containing the UICs would then be downloaded by the IHE to incorporate into its local student information system. Using UICs as the main identifier, student transcript data is then loaded to the STARR.

Authorized staff members can also utilize the Student Search functionality in MSDS to look up existing UICs using either complete or partial core demographic fields (first name, last name, date of birth and gender).

The IHE Request for UIC Collection file must be XML compliant. CEPI has provided instructions for utilizing XML validation tools on the [CEPI Postsecondary Applications web page](#) (under Technical Material). This step is essential to ensure that the file will pass basic file-level validation.

Timeline

The IHE Request for UIC Collection and Student Search function in MSDS are open year-round. Although open year-round, there will be times where MSDS is down for maintenance. Maintenance windows will be communicated in advance. To receive [application updates](#), please subscribe to our [GovDelivery](#) mailing lists.

Checklist for Obtaining UICs

This checklist of suggested tasks prepares IHE users for the IHE Request for UIC Collection:

- Obtain access to the Michigan Student Data System.
 1. Create a MiLogin account (if needed).
 2. Subscribe to MSDS in MiLogin once the account is created.
 3. Complete [MSDS IHE security form](#).
 - Please view the [MiLogin User Guide](#) for instructions on these steps. Email the [MSDS IHE security form](#), signed by the President or Registrar as listed in [EEM](#), to cepi@michigan.gov.
- Develop the export file from your local student information system, and make sure the file conforms to the [IHE Request for UIC Collection XML schema](#). (under Technical Material)
 - Tip: The [CEPI IHE web page](#) has the IHE Request for UIC XML schema, XML sample and collection components specifications.
- Review the collection timeline on page 6 of this manual.
- Become familiar with the [IHE Request for UIC Collection on the CEPI postsecondary application web page](#).
- Know your entity code.
 - Tip: Please refer to the [EEM User Guide](#) for information on searching for entity codes in [EEM](#).
- Validate your XML file prior to uploading to MSDS.
 - Tip: For assistance on validating your files, reference the XML Validation Guide on the [CEPI postsecondary application web page](#) (under Technical Material).
- Review the number of new UICs generated and the records that resulted in a match found.
 - Tip: It is highly recommended that the user selects the List of New UICs Created and the List of Positive Matches from the drop-down menu on the Staging Area Details screen in MSDS to check the results of these reports against the uploaded data. These reports may help identify data quality issues.
- Review and resolve any records that require resolution.
- Download the file with the UICs on the records.
 - Tip: All downloaded files are zipped and in XML format. XML files can be saved and opened in Excel. Large files may be separated into

smaller files to avoid system timeout issues. Be sure to download all relevant files. A sample of the XML download appears in Appendix A.

Gaining Access to MSDS

Staff members wishing to have access to MSDS will need to complete a two-step process:

1. Create a MiLogin account (if needed).
2. Subscribe to MSDS in MiLogin once the account is created.
3. Complete [MSDS IHE security form](#) and submit to CEPI.

Please view the [MiLogin User Guide](#) for instructions on these steps.

If you experience problems with your account or password, please contact CEPI at 517-335-0505 x3 or by email (cepi@michigan.gov).

Tips for Gaining Access to MSDS

- Security agreements must be signed by the President or Registrar, as listed in EEM. CEPI staff will verify that the person listed as the President or Registrar on the security agreement form matches EEM.
- CEPI staff will also verify that a subscription request has been submitted in MiLogin and that the information provided on the security agreement form matches the request. Once verified, permission will be granted and the requester will be notified by email.
- Access should be limited to only those persons who will be uploading the files or utilizing the student search function to do single student UIC lookups (should range between 2-5 people). MSDS IHE users typically include technology group members, admissions staff and/or staff from the registrar's office.

Removing Access to MSDS

When authorized users leave your organization, a removal request must be sent in. CEPI does an annual refresh notice as well. To access the Removal Request Form:

1. Go to the [Application Security Forms page](#).
2. Open the [User Removal Request Form](#).
3. Follow the instructions to complete the Removal Request Form.
4. Email the completed form to cepi@michigan.gov.

XML File Creation

The CEPI website provides the XML schema, sample schema and collection components to include in the file for the IHE Request for UIC collection. Locate these documents on the CEPI [IHE Request for UIC web page](#) (under Technical Material).

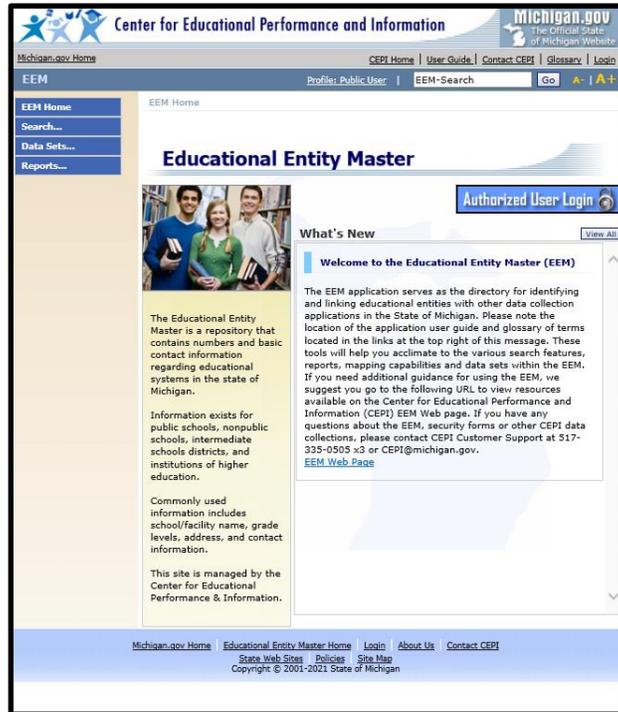
The World Wide Web Consortium is the ultimate authority on XML data types. All collection schemas will reference the W3C definitions for the base data types. Please reference the appropriate collection schema and the W3C to ensure a valid file submission.

Due to each local student information system being different, CEPI cannot provide technical support for exporting data from each student information system.

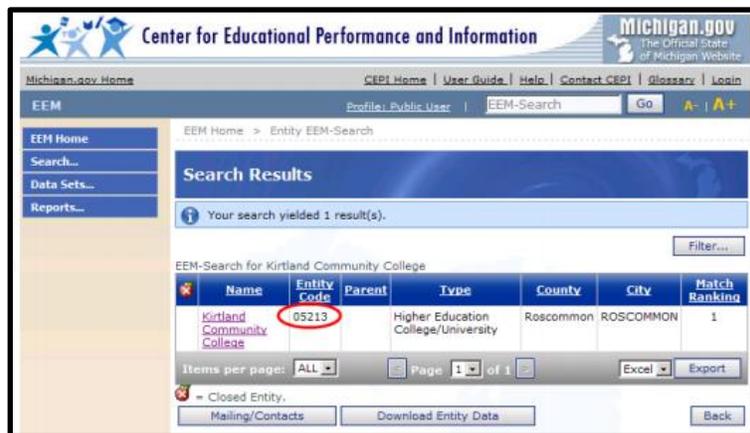
Searching for Your Entity Code

When creating the IHE Request for UIC XML data file, the IHE entity code is required. Entity code information is used for the SubmittingEntityCode and SchoolFacilityNumber characteristics. If you do not know your entity code, follow this look-up procedure in CEPI's Educational Entity Master:

1. Go to the [EEM web page](#). Enter your institution's name in the EEM-Search box. Click Go.



2. Your search will bring up the desired entity information within the Entity Code column. The entity code is a five-digit code which may include a leading zero. Please do not cut off the leading zero, as it is a digit in the code.



Logging in to MSDS

Once you have a MiLogin account and you have received confirmation that your access has been granted, you can log in to MSDS. To access MSDS:

1. Go to the [MiLogin for Business page](#).
2. Enter your User ID and Password.
3. Click the Login button. This will take you to the Application Portal page.
4. Select the Michigan Student Data System (MSDS) from your MiLogin Home Page.

MSDS provides authorized users with various roles depending on the level of access. For the IHE Request for UIC Collection:

5. Select either the IHE UIC or STARR/UIC role from the Select Profile dropdown menu and click the Continue button (this only applies to users with multiple roles).

The screenshot shows the MSDS application interface. At the top, there is a navigation bar with the Center for Educational Performance and Information logo and Michigan.gov branding. Below this is a secondary navigation bar with links to various pages. The main content area is titled 'Select User Profile' and contains a dropdown menu for selecting a profile, a 'Continue' button, and a '(Show Details...)' link.

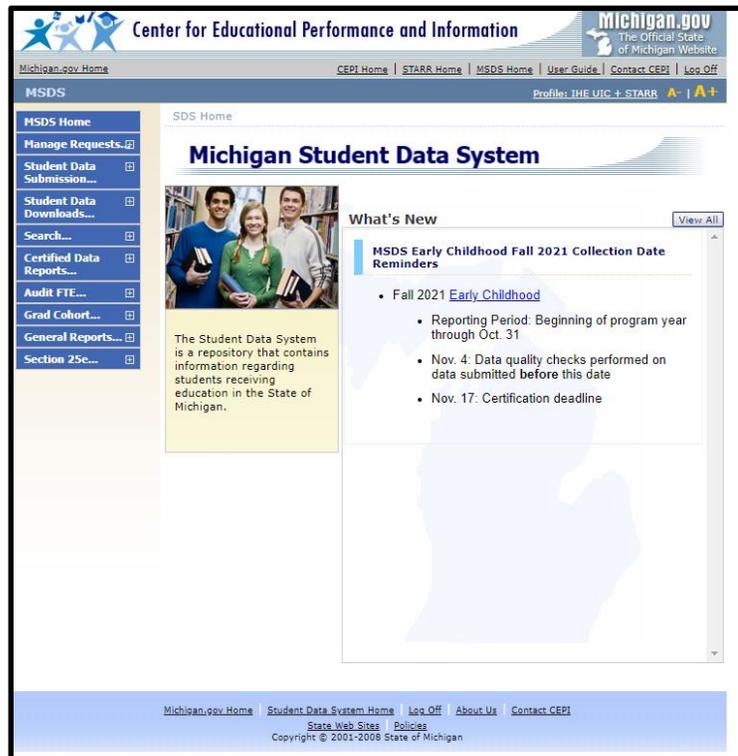
Navigating the MSDS Home Page

Below is a screenshot of the MSDS home page. Various links and menus are available to help users navigate through the web pages. The link definitions are provided below.

Menu

The Primary menu items are listed below:

- **MSDS Home** – Brings you to the home screen for the application which includes the “What’s New” section on the right.
- **Manage Requests** – Contains submenu items: Manage Requests for UIC and Manage Linking Requests. This is the primary area that allows you to follow up on UIC and Linking requests.
- **Student Data Submission** – Contains submenu items that allow the user to Upload File to certified and uncertified collections, check Uploaded File Status, and view the Data Staging area.
- **Student Data Downloads** – Contains Download Status area where the user can view status after requesting download from Staging Area.
- **Search** – Provides ability to search for individual students by UIC or by all or portions of the four core fields (first name, last name, date of birth, and gender).



Screen-Level Help

- Steps: Step-by-step instructions for using the displayed screen for its main function.
- Tips: Additional information for the screen, such as how to sort or filter.
- FAQs: Frequently Asked Questions and their answers related to the information/data fields on the displayed screen.
- Reference: Links to reference material including the training manual, data field descriptions and other useful information.

Characteristic-Level Help

Characteristic level help is available to provide information related to any characteristic. A question mark icon displayed to the right of each characteristic leads to characteristic information if you click on it. Clicking on the question mark icon will open a window describing the field in greater detail. This window will include:

1. The characteristic Label used on the screen
2. The characteristic Name
3. The characteristic Data Type
4. A description of the characteristic
5. Instructions related to the characteristic
6. The permissions that you, as a user, have for working with this characteristic

The screenshot displays the Michigan.gov website interface. The main content area is titled "Staging Area Maintain" and shows a form for "IHE Entity Demographics". The form includes fields for "School or Facility" (with the value "04481") and "Student ID Number". A red circle highlights the question mark icon next to the "School or Facility" field. A "Characteristic Help" pop-up window is open, providing details for the "School or Facility" characteristic. The pop-up window includes the following information:

- Label:** School or Facility
- Name:** SchoolFacilityNumber
- Data Type:** Numeric Text (can have leading zeros)
- Description:** The five-digit code as assigned to the building in the official Educational Entity Master.
- Instructions:** You are required to report this characteristic when the early childhood program or service that you reported in the EC Programs component is provided by a public school.
- Permissions:** Change / Approve

The pop-up window also has "Print" and "Close" buttons. The background page shows a navigation menu on the left with options like "Manage Requests", "Student Data Submission", "Upload File", "Data Staging Area", "Student Data Downloads", "Search", "Certified Data Reports", "Audit FTE", "Grad Cohort", "General Reports", and "Section 25e". The footer contains links for "Michigan.gov Home", "Student Data System Home", "Log Off", "About Us", "Contact CEPI", "State Web Sites", and "Policies", along with a copyright notice for 2001-2008 State of Michigan.

Submitting Records in the IHE Request for UIC Collection

Your XML file of student data must be uploaded so that MSDS can validate the data and assign UICs.

Uploading a file

1. From the MSDS home page, click the Student Data Submission tab from the left-hand menu. This will bring up sub-menus. Click the Upload File link. This will take you to the File Upload screen.

The screenshot shows the 'SDS File Upload' interface. On the left, a navigation menu lists various options, with 'Upload File' highlighted in red. The main area features a 'Collection:' dropdown menu, a 'Description:' text area, and a 'User Notes:' text area. At the bottom, there is a checkbox for notifications, a 'File Name:' text box, a 'Browse...' button, and an 'Upload File' button.

2. Select the IHE Request for UIC Collection from the drop-down menu. In the text box, add any user notes specific to the file, if desired.
3. Select the Browse button to choose the file to upload. Click on the file name and click "Open" or double click on the file name to populate it into the File Name text box. Click the Upload File button.

IHE Request for UIC Collection User Guide

Center for Educational Performance and Information
Michigan.gov
The Official State of Michigan Website

MSDS Home | Manage Requests... | Student Data Submission... | Upload File | Uploaded File Status | Data Staging Area | Student Data Downloads... | Search... | Certified Data Reports... | Audit FTE... | Grad Cohort... | General Reports... | Section 25e...

SDS File Upload

Collection: IHE Request for UIC Collection 2020-2021
For more information on the Collections refer to the Collection Data Field Descriptions report on the Report Menu.

Description: The IHE Request for UIC collection in the MSDS allows Institutions of Higher Education to obtain Unique Identification Codes (UICs) for their students.

User Notes:

Click here to receive a notification message when file has been processed

File Name: Choose File IHE Request for UIC Collection file.xml

Upload File

MSDS will show a progress bar to indicate that the file upload is in process. The progress of your file upload will show with a box like this:

MSDS | SDS File Upload - Work - Microsoft Edge
https://mloginworkerqa.michigan.gov/cepimds-stg/MSDS/FileUpload.aspx

Center for Educational Performance and Information
Michigan.gov
The Official State of Michigan Website

MSDS Home | Manage Requests... | Student Data Submission... | Upload File | Uploaded File Status | Data Staging Area | Student Data Downloads... | Search... | Certified Data Reports... | Audit FTE... | Grad Cohort... | General Reports... | Section 25e...

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Description: The IHE Request for UIC collection in the MSDS allows Institutions of Higher Education to obtain Unique Identification Codes (UICs) for their students.

User Notes:

Click here to receive a notification message when file has been processed

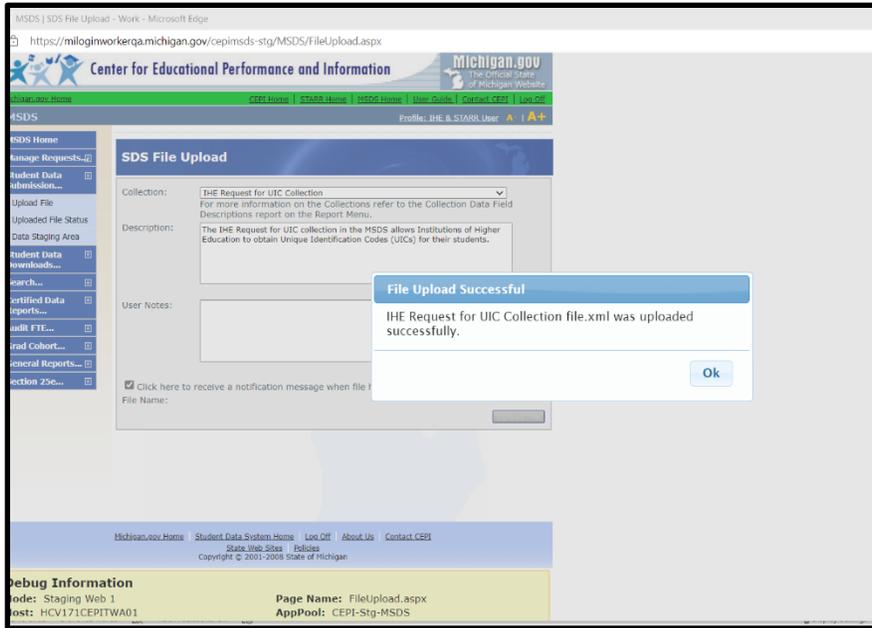
File Name: Choose File

Uploading File
IHE Request for UIC Collection file.xml (42% loaded)

Michigan.gov Home | Student Data System Home | Log Off | About Us | Contact CEPI
State Web Sites | Enlaces
Copyright © 2001-2008 State of Michigan

Debug Information
Node: Staging Web 1
Host: HCV171CEPITWA01
Page Name: FileUpload.aspx
AppPool: CEPI-Stg-MSDS

Once processed, you may receive a message indicating that your file was “uploaded successfully.” Receiving this message does not mean it passed file-level validation.

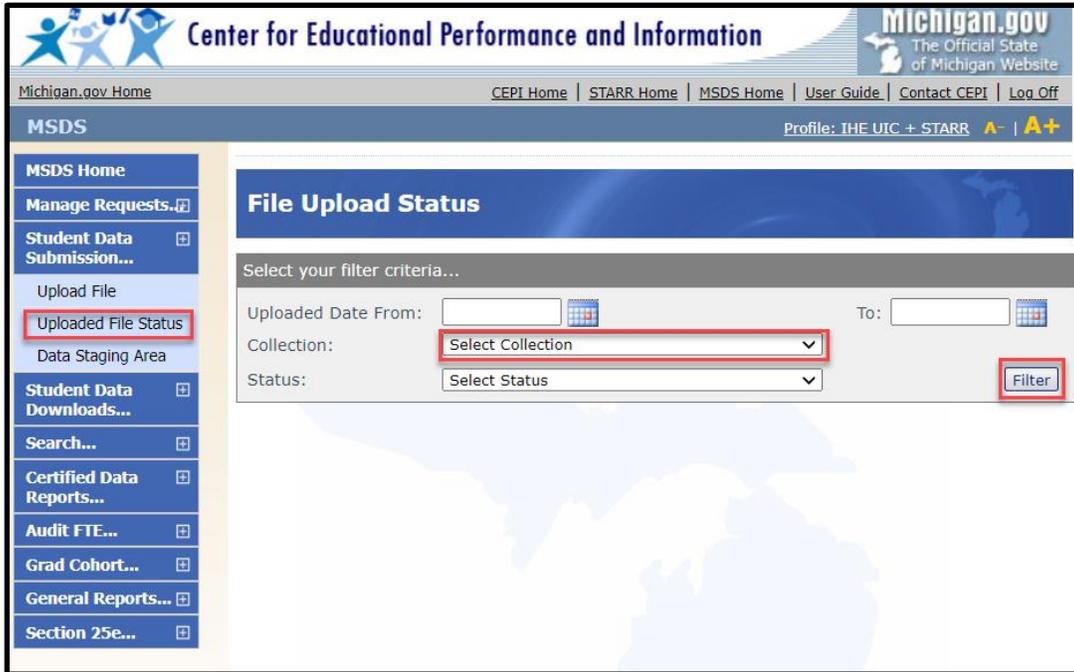


It is important to note how validation occurs in MSDS.

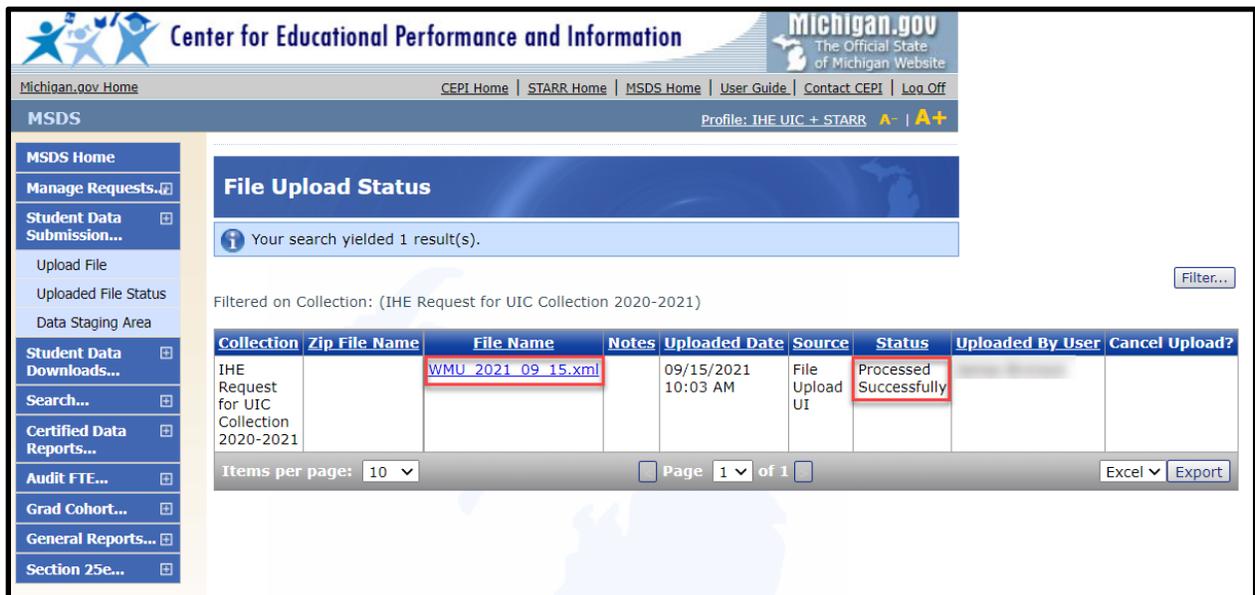
- File-Level Validation (File Upload) – File-level validation ensures that the file meets the schema. Although this does happen when the file is uploaded, ideally it should first occur offline. System performance is directly related to the number of files that are uploaded that do not pass file-level validation.
- Field-Level Validation – Once a file is uploaded and passes file-level validation, MSDS processes the Field-Level Validation. Once a file is accepted, it is loaded into a Staging Area. Field-level validation may result in field-level errors/warnings.

Checking Your File's Status

1. To check the status of your uploaded file to see if it was accepted or rejected due to file-level validation errors, go to the Uploaded File Status tab from the left-hand menu.
2. Select the IHE Request for UIC Collection from the drop-down menu.
3. Select the Filter button. This will take you to a screen showing the results of an uploaded file.



View the Status column to determine if your uploaded file was processed successfully. If the column reads "Processed Successfully," the data have been transferred to the data Staging Area. This screen also shows all files that have been uploaded by your entity that may have been uploaded by a different authorized user. If you wish to view the details of the upload status, click on the File Name.



Clicking on the file name will bring up the File Upload Status Details screen, which looks like the one below. This screen displays details such as if the file was uploaded successfully or if there were issues with the upload. If the file does not

process successfully, you will need to correct the file-level validation issues and reupload the file. To exit this screen, click the Close button.

The screenshot displays the 'File Upload Status Details' page within the MSDS application. The page header includes the 'Center for Educational Performance and Information' logo and the 'michigan.gov' logo. The sidebar on the left contains various navigation options such as 'MSDS Home', 'Manage Requests...', 'Student Data Submission...', 'Upload File', 'Uploaded File Status', 'Data Staging Area', 'Student Data Downloads...', 'Search...', 'Certified Data Reports...', 'Audit FTE...', 'Grad Cohort...', 'General Reports...', and 'Section 25e...'. The main content area shows the following details:

Collection: IHE Request for UIC Collection 2020-2021
File Name: WMU_2021_09_15.xml
Stored File Name: WMU_2021_09_15_09-15-2021_10-03-16-110.xml
Notes:
Upload Date: 9/15/2021 10:03:00 AM
Upload Source: File Upload UI
Upload Status: Processed Successfully
Status Description: Processed Successfully
Uploaded By: [Redacted]
Submitting System Name: My System
Submitting System Version: 1.0
Submitting System Vendor: My System Vendor

Submitting Entity	Count
Western Michigan University (04481)	5252

Records Contained: 5252
Validation Error: None

Close

Reviewing Records

After viewing the file upload status and confirming that your file processed successfully, you should next open the data Staging Area. The Staging Area is where:

- The file goes through field-level validation and the UIC matching process.
 - Users can see which records resulted in a new UIC being generated, a match found or requires resolution.
 - Users can see field-level errors and warnings.
 - Users can correct field-level errors. (Please note that UICs will be assigned despite errors and warnings)
1. To view the records in the Staging Area, click on the Data Staging Area tab from the left-hand menu.
 2. In the Staging Area screen, select IHE Request for UIC Collection in the Collection drop-down box.
 3. Click the Filter button.
 4. Clicking the Collection Name will take you to the Staging Area Details screen.

The screenshot displays the MSDS Staging Area interface. The left-hand menu has 'Data Staging Area' selected (1). The main content area shows a filter section where 'Collection' is set to 'IHE Request for UIC Collection 2020-2021' (2) and the 'Filter' button is visible (3). Below the filter, a table displays one result:

Collection	Submitting Entity	Students	Certification Status	Last Certified	Collection Open?	Certification Available?
IHE Request for UIC Collection 2020-2021	Western Michigan University (04481)	5,252	Certification not Required		Yes	No

The table includes action links: Upload, Download, and Delete. The bottom of the table shows 'Items per page: 10' and 'Page 1 of 1'.

The Staging Area Detail screen displays the errors and warnings with the uploaded records, if any. This screen also displays the results of UIC Matching.

The Staging Area Detail screen is broken into the following five areas:

1. Validation Status (results of field-level validation) - Lists the number of records where errors exist, records with warnings and records with no errors or warnings. Clicking on the hyperlink of the validation status will filter those records with that status. The records will display at the bottom of the screen.
2. Validation Reports - Allows you to download reports that give details on which records have errors or warnings.

3. UIC Resolution Status (results of UIC matching) - Lists the number of records which require resolution, that resulted in a match found and that resulted in a new UIC being generated. Clicking on the hyperlink of the UIC resolution status will filter those records with that status. The records will display at the bottom of the screen.
4. UIC Resolution Reports - Allows you to download reports that give details on which records require resolution, that resulted in a match found and that resulted in a new UIC being generated.
5. Student Records - Display at the bottom of the screen. Users can filter the list of records by Validation Status, UIC Resolution Status or by students' last name. Users can also filter the list of students by clicking Filter.

The screenshot displays the 'Staging Area Detail' page for the 'IHE Request for UIC Collection 2020-2021' at Western Michigan University. The page is divided into several sections:

- Filter Criteria:** Submitting Entity: Western Michigan University (04481); Collection: IHE Request for UIC Collection 2020-2021.
- Total Records:** 5252.
- Validation Status (1):** A table showing counts for various validation states:

Errors Exist	0
Error Free with Warnings	0
Error Free with No Warnings	5252
Pending Validation	0
Processing Validation	0
Validation Failed	0
- UIC Resolution Status (2):** A table showing counts for various UIC resolution states:

Requires Resolution	0
Match Found	3382
Used Previous Resolution Result	0
New UIC Generated	1870
New UIC Requested	0
Not Eligible for Resolution	0
Pending Resolution	0
Processing Resolution	0
Requires New UIC Not Allowed for Collection	0
UIC Request Denied	0
UIC Resolution Failed	0
- Validation Reports (3):** Includes a 'Select a report:' dropdown, a 'Select a format:' dropdown, and a 'Run Report' button.
- UIC Resolution Reports (4):** Includes a 'Select a report:' dropdown, a 'Select a format:' dropdown, and a 'Run Report' button.
- Staging Reports:** Includes a 'Select Report' dropdown, a 'Select Format' dropdown, and a 'Run Report' button.

At the bottom, there is a table header with columns: Select, School Facility #, User Notes, UIC, Last Name, First Name, Gender, Date of Birth, Validation Status, Resolution Status, Certification Date. A message states: 'Your search yielded 2000 result(s)'. Navigation buttons include 'Select All', 'Unselect All', 'Delete Selected', 'Add Direct', 'Search / Add', and 'Rerun Resolution'.

UIC Resolution

UIC Resolution is the process of ensuring that each student is correctly associated with a UIC. The MSDS application matches every submitted record against the Student Master Record table. The fields used for matching include the First Name, Last Name, Date of Birth and Gender fields. Additional fields that MSDS uses for matching are the UIC, Last Name Suffix and the Middle Name/Middle Initial fields, if they are provided in the submitted record. If the UIC for a student is known, the UIC should be submitted with the student record. Submitting with the UIC should prevent new UICs from being created for students because of demographic changes.

The fields in the submitted record are compared against the corresponding fields of records in the Student Master Record table to determine if it is the same student or not. Based on the fields used for matching, a score is calculated that determines how closely the submitted record matches to a record(s) in the Student Master Record table. The calculated score determines if a record requires resolution.

Records that require resolution necessitate user intervention to determine which UIC should be associated with a student's record. If no match is found, the system automatically creates a new UIC.

To determine which records require resolution:

1. Click Student Data Submission and Data Staging Area from the left navigation bar.
2. Select the IHE Request for UIC Collection from the drop-down menu.
3. Click the Filter button.
4. Click on the collection name link.
5. Click Requires Resolution from the UIC Resolution Status section of Staging Area Detail page.



The screenshot shows a web application interface with a table of student records. At the top, there are buttons for 'Select All', 'Unselect All', 'Delete Selected', 'Add Direct', 'Search / Add', and 'Rerun Resolution'. Below these buttons, it says 'Filtered on Resolution Status: (Requires Resolution)' and 'Your search yielded 1 result(s)'. The table has columns: 'Select', 'School Facility #', 'User Notes', 'UIC', 'Last Name', 'First Name', 'Gender', 'Date of Birth', 'Validation Status', 'Resolution Status', and 'Certification Date'. The 'Resolution Status' column for the first record is circled in red and labeled 'Requires Resolution'. At the bottom, there are controls for 'Items per page: 10', 'Page 1 of 1', and 'Excel Export' buttons.

Select	School Facility #	User Notes	UIC	Last Name	First Name	Gender	Date of Birth	Validation Status	Resolution Status	Certification Date
<input type="checkbox"/>						M		Error Free with No Warnings	Requires Resolution	

6. Scroll to bottom of page and click the Requires Resolution link to the right of the student's name.
7. Review the student records presented as possible matches. This could be a single match or several.

UIC Resolution

Core Information

UIC Resolver List

Field Name	Submitted Record	Potential Match
Match Reason	Submitted	87.84% Requires Resolution (A primary UIC was found with core fields < maybemaximum)
UIC		Z
Linked UICs		
First Name		
Middle Name		
Last Name		
Suffix		
Date of Birth		
Gender	M	M
Multiple Birth Order	0	0
Last Modified By		
Last Modified On		
UIC Requested By		
UIC Requested On		

[Request new UIC](#) [Use This Potential](#)

Extended Collection Information

Field Name	From Request for UIC Collection	Previous Collection Unavailable
Previous Last Names		
Race Ethnicity		
Student Id Number		
Grade Or Setting		
Enrollment Date		
Exit Date		
District Exit Status		
Address		
Submitting Entity		

[Back To Staging Record](#)

8. Click the UIC hyperlink of the possible match record to review the student's history.
 - a. Both demographic information and student history should be utilized to determine if a potential UIC match belongs to your student. **Keep in mind, if demographic fields do not match exactly, the potential match could still belong to your student.** Some demographic information may change over time, so simply stating the demographic fields do not match exactly is not a sufficient justification for a request for a new UIC.
9. If you determine that the possible match(es) presented belongs to your student, click "Use this Potential."
10. If you determine that your student is a different student than the student presented as a possible match(es), click "Request New UIC."
11. Enter reason for new UIC request in the UIC Request Comments pop-up box.
 - a. **For a new UIC request to be successfully processed, please include justifications that provide contextual information, such as:**
 - i. **Student was previously homeschooled, and we've confirmed the student has never received services before through the Michigan public school system.**

Requesting to Link UICs

Users may find that the same student has been assigned more than one UIC through UIC Resolution or through Student Search. When this occurs, it is important that the user requests that those UICs be linked. Linking UICs allows the history of those student records to be tied together. Linking also allows students to be appropriately tracked over time. A system administrator will review and approve/deny every linking request based on the information provided in the request.

Users can request to link UICs from the Student History screen, which can be accessed from several screens, including the Student Details screen (Student Search), and the UIC Resolution screens.

1. From the Student History screen, select Request to Link from the Action drop-down list.
2. Click the Go button.

The screenshot shows the 'Student History' interface. At the bottom, the 'Action:' dropdown menu is open, with 'Request to Link' selected. A red box highlights the dropdown menu and the 'Go' and 'Back' buttons next to it.

The Student Link Request form allows users to request to link up to six UICs.

The screenshot shows the 'Student Link Request' form. It features a table with columns: UIC, Last Name, First Name, Middle Name, DOB, PEPE District, PEPE Building, Cohort Year, and Primary. A 'Justification:' text area is located below the table. Numbered callouts (3-7) point to specific elements: 3 points to the UIC column, 4 to the Primary column, 5 to the Justification text area, 6 to the 'Validate All' button, and 7 to the 'Submit Request' button.

3. Enter the UICs you wish to link in the UIC column.

4. Choose the radio button for the primary UIC. The primary UIC should be the UIC with the most recent history records.
5. Add justification for the link request in the Justification text box.
6. Click the Validate button to confirm that you are requesting to link valid UICs.
7. Click the Submit Request button.
8. Requests are placed in a queue that the system administrator reviews and approves or denies based on the information submitted in the request. Typical turn-around time is one to two business days. You may review your request and the status of your request on the Manage Linking Requests screen or in Student Search.

Requesting to Unlink UICs

Sometimes UICs are linked, and it is determined that those UICs are assigned to two different students. If this occurs, users should request to unlink the UICs and split the history of those records. Splitting the history of two previously linked UICs assigns the appropriate history record to the correct UIC.

If you determine that UICs have been linked in error, please contact CEPI customer support at cepi@michigan.gov or 517-335-0505 x3. Please provide your name, telephone number (including area code and extension), district code and district name (if applicable), along with the UICs and the reason why you believe these UICs have been linked in error. CEPI will send an email once the UICs have been unlinked.

Manage Requests for UICs

When a request for a new UIC is submitted, it will display under the Manage Requests for UIC menu. The system administrator reviews these requests daily and approves/denies based on the information provided in the request. If your request is approved, a new UIC is created. The new UIC is assigned to the student's record and can be viewed on this screen or in the Staging Area in the collection that the user requested the new UIC.

UIC Request Summary

Select your filter criteria...

First Name: Last Name:

Requested By:

District:

Building:

Status: ▼

Request Date From: To:

Response Date From: To:

UIC Request Summary

Request Date From (06/23/2010), Request Date To (06/25/2010)

UIC	Last Name	First Name	D.O.B.	Collection	Submitting Entity	District/Building
				Request for UIC 2009-2010	Western School District (38010)	

Request Justification: I have confirmed with the district associated with the possible match, that these are in fact two different students. Please generate a new UIC for my student. Thank you!

Approver Notes:

Requested By: Meghann E Omo Request Date: 06/24/2010
Response By: Response Date: Status: New

Items per page: 10 Page 1 of 1

Choose Manage Requests for UIC from the Manage Requests menu. You'll be able to filter requests by the following fields:

- First Name
- Last name
- Requested By
- District
- Building
- Status
- Requested Date Range
- Response Date Range

1. Once your filter results have been returned, click on the Details button to review your request. This will bring up the UIC Resolution screen for that student.

2. Use the Back and Next buttons to move to the next request.
3. Once a system administrator has approved or denied your request, the Details button is disabled.

Notes:

- Requests will remain in a new status until a system administrator has reviewed and approved or denied your request.
- Once a request has been approved or denied, the Details button becomes disabled.
- You will need to filter the list to review the status of your requests.

Request for New UIC that has been denied:

If your request is denied, please review the notes from the system administrator. If the system administrator requested more information about the request, please resubmit the request and with that additional information.

Information on why the request was denied can be found on the Manage Requests for UIC screen or within the staging area. See screen shots below.

Manage Request for UIC – filtered on student’s name. The request state is Denied, and system administrator notes are seen in the “Approver Notes” section.

UIC Request Summary

Filtered By: First Name = "Harry", Last Name = "Potter" Filter..

Select your filter criteria...

First Name: Last Name:

Requested By:

District:

Building:

Status:

Request Date From: To:

Response Date From: To:

Filter Clear

Your search yielded 1 result(s).

UIC	Last Name	First Name	D.O.B.
	Potter	Harry	07/31/1997

Collection: IHE Request for UIC Collection 2020-2021
Submitting Entity: Western Michigan University (04481)
District:
Building:

Request Justification: Two different students. Gender is different.

Approver Notes: These appear to be the same student. A different gender is not a reason to create a new UIC. If the gender is incorrect, please choose "Use This Potential" and when prompted to update the master record, choose "Yes".

Requested By: Meghann Omo Request Date: 11/23/2021 Status: Denied
Response By: Meghann Omo Response Date: 11/23/2021

Items per page: Page of

Data Staging Area – filtered on UIC Request Denied status. The UIC Resolution status is “UIC Request Denied.” Notes from the system administrator can be seen by clicking on the “UIC Request Denied” hyperlink to the right of the student’s name.

Staging Area Detail

Select your filter criteria...

Submitting Entity: Western Michigan University (04481)
Collection: IHE Request for UIC Collection 2020-2021

Total Records - 1

Validation Status

Errors Exist	0
Error Free with Warnings	0
Error Free with No Warnings	1
Pending Validation	0
Processing Validation	0
Validation Failed	0

UIC Resolution Status

Requires Resolution	0
Match Found	0
Used Previous Resolution Result	0
New UIC Generated	0
New UIC Requested	0
Not Eligible for Resolution	0
Pending Resolution	0
Processing Resolution	0
Requires New UIC Not Allowed for Collection	0
UIC Request Denied	1

Select	School Facility #	User Notes	UIC	Last Name	First Name	Gender	Date of Birth	Validation Status	Resolution Status	Certification Date
<input type="checkbox"/>			potter	Harry	F	07/31/1997	Error Free with No Warnings	UIC Request Denied		

UIC Resolution

This record has a related request for new UIC. It was previously Denied.

Request For New UIC details

Requested By: Meghann Omo on 11/23/2021
Justification: Two different students. Gender is different.
Approval Status: Denied
Response By: Meghann Omo on 11/23/2021
Response Reason: These appear to be the same student. A different gender is not a reason to create a new UIC. If the gender is incorrect, please choose "Use This Potential" and when...

Core Information

Field Name	Submitted Record	Potential Match
Match Reason	Submitted	Sent to resolution: More than one match found (by flipping gender) that are primary UICs
UIC		2037838874
Linked UICs		
First Name	Harry	Harry
Middle Name		
Last Name	Potter	Potter
Suffix		
Date of Birth	07/31/1997	07/31/1997
Gender	F	M
Multiple Birth Order	0	0
Last Modified By	Meghann Omo	N/A for UserId 4151
Last Modified On	11/23/2021	08/27/2013
UIC Requested By	Meghann Omo	Meghann Omo
UIC Requested On	11/23/2021	11/23/2021

Extended Collection Information

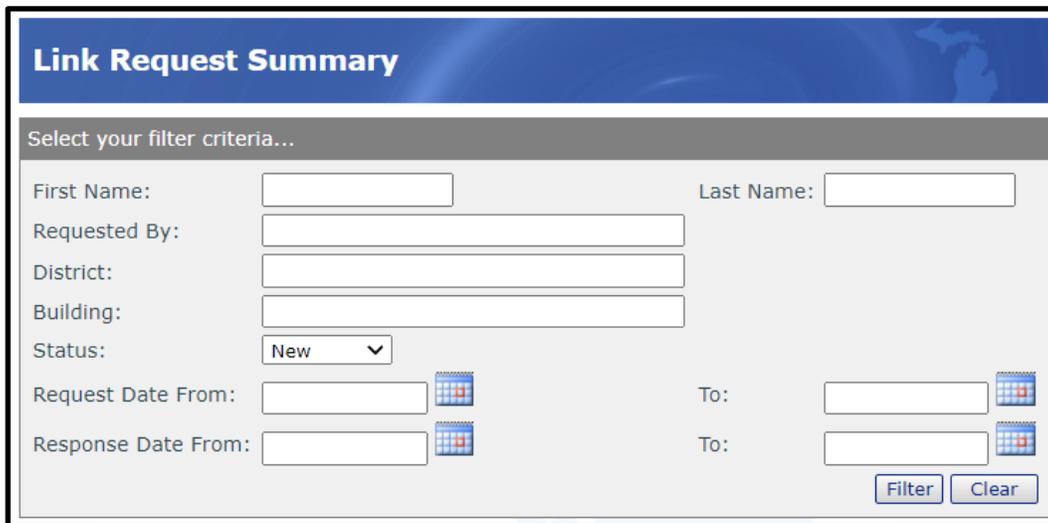
Field Name	From IHE Request for UIC Collection 2020-2021	Previous Collection Unavailable
Previous Last Names		
Race Ethnicity		
Student Id Number		
Grade Or Setting		
Enrollment Date		
Exit Date		
District Exit Status		
Address		
Submitting Entity	Western Michigan University (04481)	

Manage Linking Requests

When a request to link UICs is submitted, it will display under the Manage Linking Requests menu. The system administrator reviews these requests daily and approves/denies based on the information provided in the request. If your request is approved, the UICs will be linked.

Choose Manage Linking Request from the Manage Requests menu.

1. Use the filter screen to filter your requests. You may filter on the following fields:
 - First Name
 - Last Name
 - Requested By
 - District
 - Building
 - Status
 - Submit Date
 - Approved/Denied From



The screenshot shows a web interface titled "Link Request Summary". Below the title is a section labeled "Select your filter criteria...". This section contains several input fields for filtering requests: "First Name:" and "Last Name:" (text boxes), "Requested By:" (text box), "District:" (text box), "Building:" (text box), "Status:" (dropdown menu with "New" selected), "Request Date From:" and "To:" (date pickers), and "Response Date From:" and "To:" (date pickers). At the bottom right of the filter section are two buttons: "Filter" and "Clear".

2. Once your filter results have been returned, you may review your requests to see if they have been approved or denied by the system administrator.

Link Request Summary

Status (Approved)

UIC	Last Name	First Name	Middle Name	D.O.B.	District	Building	Primary
		Jordan			Westwood Community School District (82240)	Crestwood School District (82230)	<input checked="" type="radio"/>
		Jordan					<input type="radio"/>

Request Justification:

Student was enrolled, by mom, on 9/8/09 under the last name of Oaks. Father showed up following day with a more recent birth certificate with the name of Harns. We will be using the UIC for Harns.

Approver Notes:

Request approved.

Requesting District:

Requested By: Request Date: 09/21/2009 Primary Has PEPE: Yes

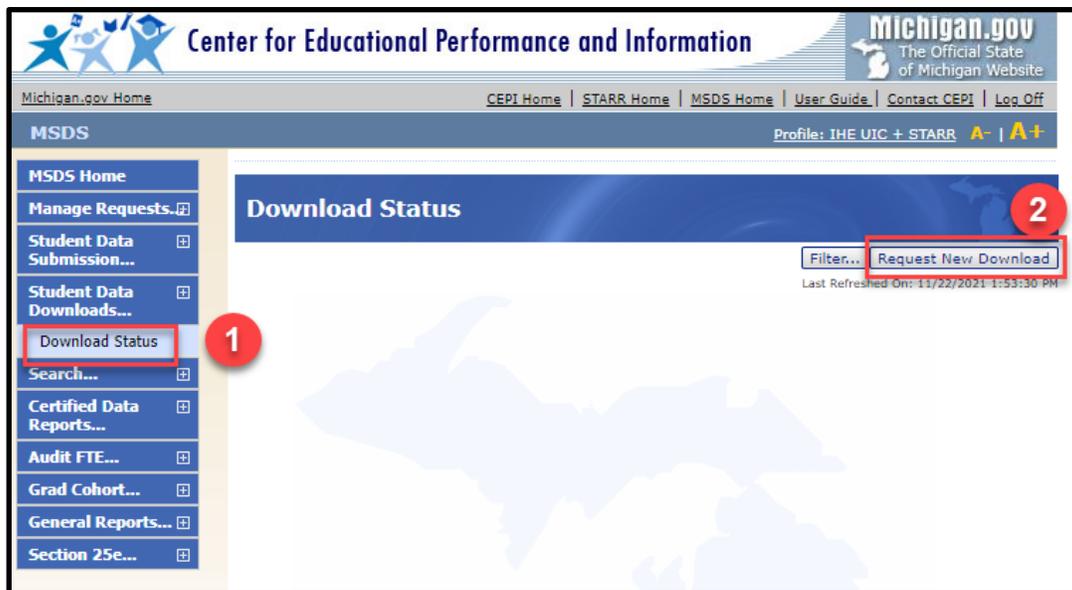
Response By: Meghann Omo Response Date: 03/16/2011 Status: Approved

- Approved/denied status is shown in the bottom right-hand corner of each request.

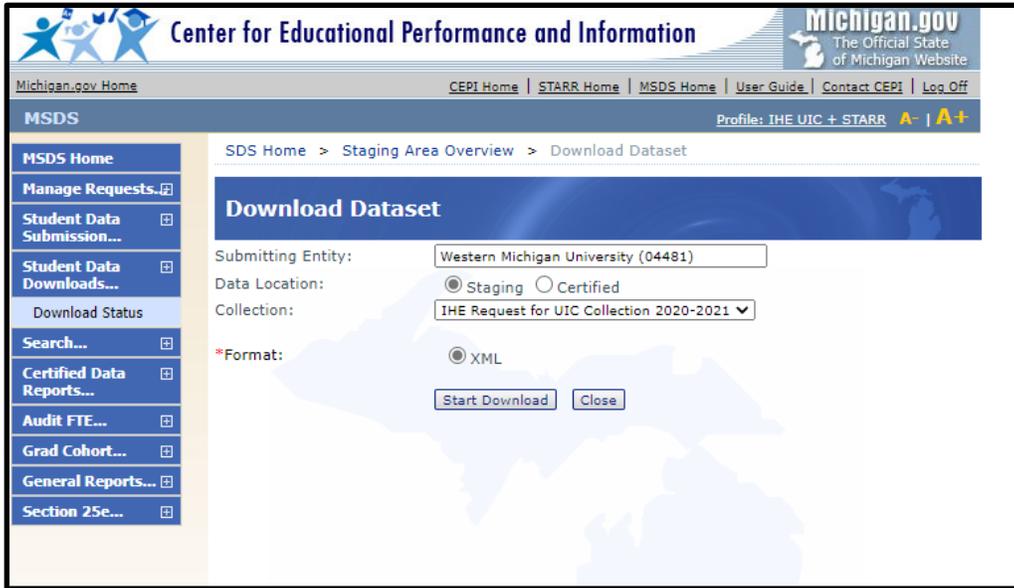
Downloading Files

MSDS will provide you with a report of the UICs (existing or newly created) based on the matching process results. In this report, the UICs will be provided to you in a new column added to the end of your submitted file. The download file is in the same XML format as the uploaded file, except the UIC characteristic is included in the file. The UIC characteristic will be the first characteristic in the Personal Core Component. An example of a downloaded XML file can be found in Appendix A. To download the report:

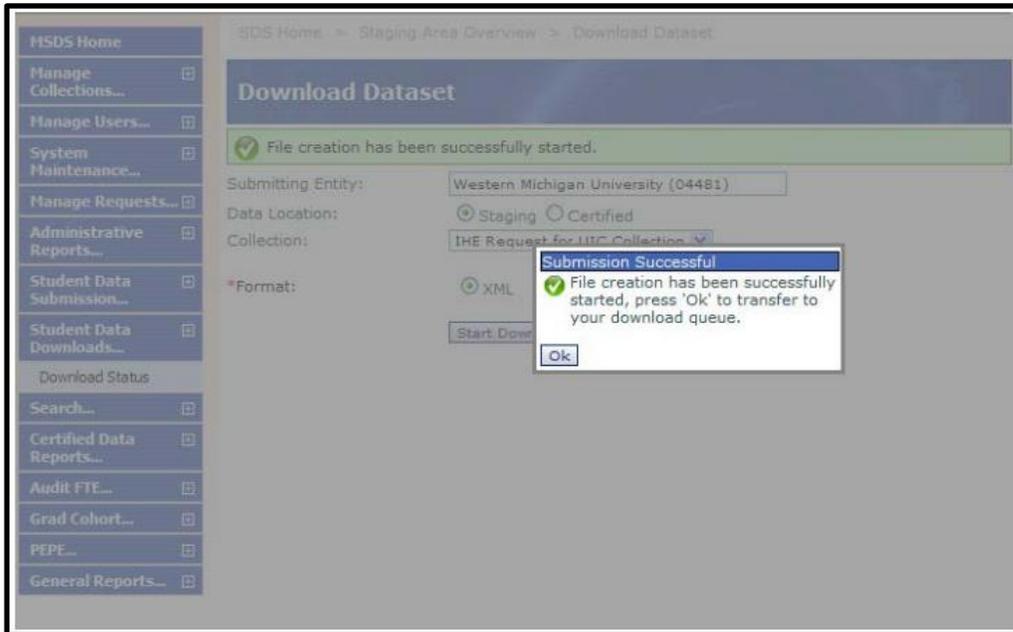
1. Click the Student Data Downloads tab from the left-hand menu. This will bring up a sub-menu. Click on the Download Status tab.
2. Click the Request New Download button.



3. Enter your institution's name or entity code, data location and collection.
4. Click the Start Download button.



5. You will be prompted to go back to the Download Status screen. Click Ok.



6. The Download Status screen will show the status of the requested download. Your file is ready when the filename is a hyperlink.

Note:

You may need to periodically refresh this screen (by using the F5 key on your keyboard) to display the updated status. To save a copy of your downloaded file, click on the hyperlink of the file name from the Download Status screen. All downloaded files are zipped. You will be prompted to Open or Save the data

download. Large files may have been separated into smaller files to avoid system time-out issues. Make sure to download all relevant files.

Manually Entering Student Data

If your IHE only needs a few UICs, you may want to consider adding your student data manually rather than doing a file upload to MSDS. To begin:

1. Go to the Data Staging Area screen by clicking on the Data Staging Area tab from the left-hand menu.
2. Enter your five-digit IHE entity code.
3. Click the Add New Collection button. If the IHE Request for UIC Collection has already been added for your entity, skip to Step 7.

The screenshot displays the MSDS Data Staging Area interface. The left-hand menu includes options like 'MSDS Home', 'Manage Requests...', 'Student Data Submission...', 'Upload File', 'Uploaded File Status', 'Data Staging Area' (highlighted), 'Student Data Downloads...', 'Search...', 'Certified Data Reports...', 'Audit FTE...', 'Grad Cohort...', 'General Reports...', and 'Section 25e...'. The main content area is titled 'Staging Area' and features a search filter section with the following fields:

- Submitting Entity:
- Collection:
- Certification Status:

Below the search section, a message states 'Your search yielded 1 result(s)'. A table displays the search results:

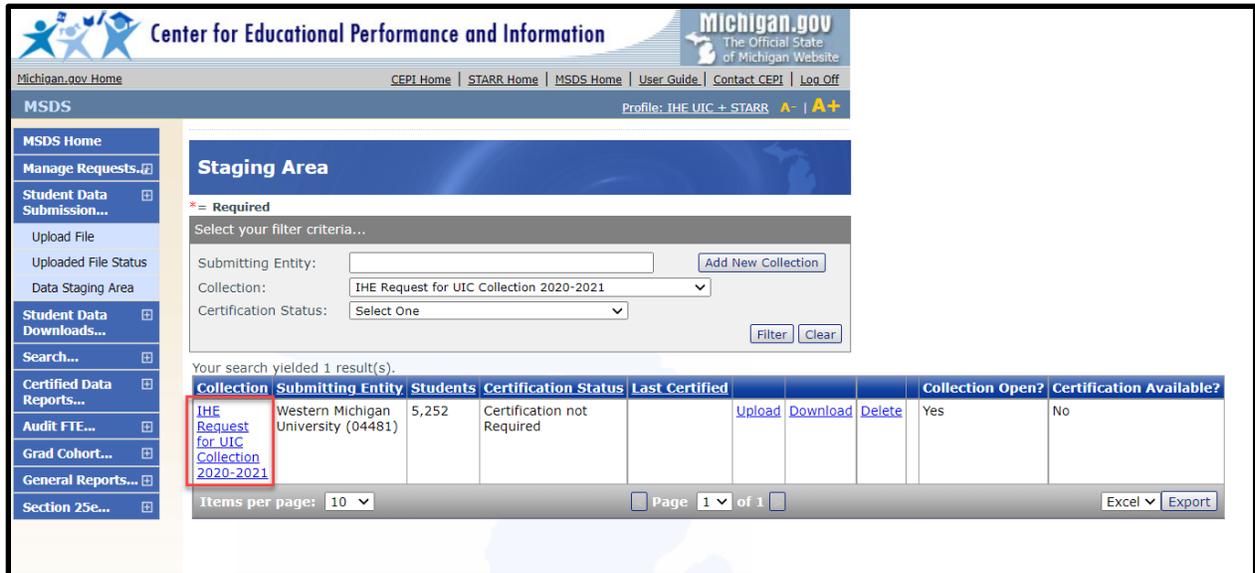
Collection	Submitting Entity	Students	Certification Status	Last Certified	Collection Open?	Certification Available?
IHE Request for UIC Collection 2020-2021	Western Michigan University (04481)	5,252	Certification not Required		Yes	No

At the bottom of the table, there are controls for 'Items per page: 10', 'Page 1 of 1', and buttons for 'Excel' and 'Export'.

4. On the Add New Collection screen, choose the Collection from the drop-down list.
5. Click the Add Collection button. Note: Adding a new collection is only necessary if the collection does not already exist. This is not something you need to do each time you want to manually enter data.



6. You will be taken to the Staging Area page to access your collection. Select the collection from the drop-down menu.
7. Click on the collection name.



To Add a Student

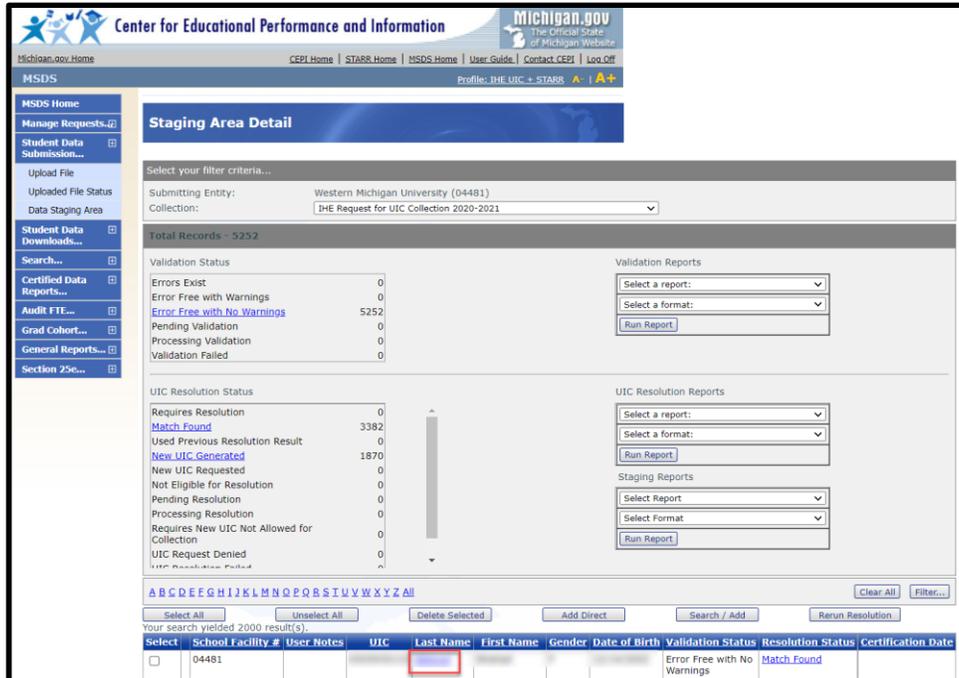
1. Click the Add Direct button from the Staging Area Detail screen. This will take you to the Add Student screen.

IHE Request for UIC Collection User Guide

2. Enter all required information. Core field information is required and denoted by a red asterisk (*).
3. Click the Submit button. This will submit the student to the IHE Request for UIC Collection, and you will be returned to the Staging Area Detail screen.

You can also add another student record by clicking on the Submit/Add Another button and following the previous steps above to submit the next student to the IHE Request for UIC Collection.

4. Once the record has been added to the Staging Area Detail screen, click on the student's Last Name link. This will display the Staging Area Maintain screen.



5. Enter known student information on all appropriate tabs. If entering dates, slashes or dashes may be used. (Format: MM/DD/YYYY)
6. Click the Submit button.
7. If errors or warnings are encountered, they will appear below the student information. Correct all errors. Review warnings and make pertinent corrections, then click the Submit button again to refresh the data.

Student Search

Use the Student Search feature to look up individual students to locate their UICs. To perform a student search:

1. Click on the Search tab at the left-hand menu. This will bring up a sub-menu. Click on the Student Search tab. This will take you to the Student Search screen.
2. Click the radio button next to Search By Core Fields.
3. Type in all or portions of the core fields.
 4. Click on the Filter button. This will bring up the search results for the student. Note: No search results will appear if no matches were found in the system. The search results may also bring up multiple matches. If you discover that there are multiple UICs for your student, the UICs should be

linked. See the section on linking UICs for these instructions.

5. Click on the hyperlinked UIC for the student. This will take you to the Student Details screen to view detailed information on the student.
6. The Student Type identifies if the student has a Secondary (K12) and/or a Higher Education (HE) record.

Student Search							
<p>i Your search yielded 2 result(s).</p> <p>Filtered on Last Name(potter%), First Name(harry%), Birth Year(1997), Birth Month(07), Birth Day(31)</p>							
Student UIC	Last Name	First Name	Middle Name	Date of Birth	Gender	Multiple Birth Order	Student Type
2037838874	Potter	Harry		07/31/1997	M	0	K12
2037838874	Potter	Harry		07/31/1997	M	0	HE
<p>Items per page: 10 <input type="button" value="v"/> Page 1 <input type="button" value="v"/> of 1 <input type="button" value="v"/> Excel <input type="button" value="v"/> Export</p>							

A screen like the one below will display for the student.

IHE Request for UIC Collection User Guide

Student Details	
Back to Search Results View Student History	
	Primary
Unique Identification Code (UIC)	092
Student First Name	
Student Middle Name	
Student Last Name	
Student Suffix	
Date of Birth	
Gender Code	
Grade or Setting	
Student ID Number (Membership)	
Racial/Ethnic Code	
Operating District Number	
School or Facility	
Date of Enrollment	
Date Exited	
District Exit Status	0
Multiple Birth Order	0
Created By	
Created Date	
Created By Submitting Entity	
Modified By	
Modified Date	
Modified By Submitting Entity	
Approved By	
Approved Date	

Appendix A: Download XML Sample with UIC Field Added

After submitting files to the Staging Area, an XML file can be downloaded to capture student demographic information for all students in the collection, as shown in the example below.

```
<?xml version="1.0" encoding="utf-8"?>
<IHERequestForUICGroup SchemaVersionMajor="Collection" SchemaVersionMinor="4" CollectionId="247" SubmittingSystemName="My System" SubmittingSystemVendor="My System Vendor" SubmittingSystemV
<IHERequestForUIC>
  <SubmittingEntity>
    <SubmittingEntityTypeCode>B</SubmittingEntityTypeCode>
    <SubmittingEntityCode>04481</SubmittingEntityCode>
  </SubmittingEntity>
  <PersonalCore>
    <UIC>3511559197</UIC>
    <LastName>Bronco</LastName>
    <FirstName>Buster</FirstName>
    <MiddleName>Richard</MiddleName>
    <StudentSuffix>Jr.</StudentSuffix>
    <DateOfBirth>2003-12-12</DateOfBirth>
    <MultipleBirthOrder>0</MultipleBirthOrder>
    <Gender>M</Gender>
  </PersonalCore>
  <IHEEntityDemographics>
    <SchoolFacilityNumber>04481</SchoolFacilityNumber>
    <StudentIdNumber>000001840</StudentIdNumber>
  </IHEEntityDemographics>
</IHERequestForUIC>
<IHERequestForUIC>
  <SubmittingEntity>
    <SubmittingEntityTypeCode>B</SubmittingEntityTypeCode>
    <SubmittingEntityCode>04481</SubmittingEntityCode>
  </SubmittingEntity>
  <PersonalCore>
    <UIC>9549630862</UIC>
    <LastName>Potter</LastName>
    <FirstName>Harry</FirstName>
    <MiddleName>E</MiddleName>
    <DateOfBirth>2002-07-31</DateOfBirth>
    <MultipleBirthOrder>0</MultipleBirthOrder>
    <Gender>M</Gender>
  </PersonalCore>
  <IHEEntityDemographics>
    <SchoolFacilityNumber>04481</SchoolFacilityNumber>
    <StudentIdNumber>000001841</StudentIdNumber>
  </IHEEntityDemographics>
  <PersonalDemographics>
    <Ethnicity>000010</Ethnicity>
  </PersonalDemographics>
  <Contacts>
    <AddressTypeDescriptor>Physical</AddressTypeDescriptor>
    <StreetNumberName>111 Stadium Drive</StreetNumberName>
    <City>Kalamazoo</City>
    <StateAbbreviationDescriptor>MI</StateAbbreviationDescriptor>
    <PostalCode>49009</PostalCode>
  </Contacts>
</IHERequestForUIC>
</IHERequestForUICGroup>
```

It should be noted that the Personal Demographics and Contacts components are optional components in the IHE Request for UIC Collection.