

Address Verification Procedural Checklist



Change Log

Date	Section Number/Name	Change Description
12/1/14	Enable Address Standardization and Address Verification	Update screenshot
10/15/14	Entire document	Update screenshots and breadcrumb trail
7/10/14	Beginning	Change reference from DASL General Use End User Guide to SI Getting Started End User Guide
8/7/13	Enable Address Standardization and Address Verification	14.0.0 Updates – Updated screenshot – added ThinkGate School Type field
10/11/12	Beginning Register Students Check Verification on Existing Students	13.1.0 Updates – Edited text for revised functionality Updated figures and text for revised functionality
9/21/12	Enable Address Standardization and Address Verification	Move this step to after Edit Information on Address Entries – so district address entered before turning on Address Verification
8/28/12	Entire document	13.0.0 Updates – Remove reference to the old Registration screen
8/23/12	Enable Address Standardization and Address Verification	13.0.0 Updates – Added note explaining that the web.config file needs to have the VerificationEnabled key set to true
9/29/11	Check Verification on Existing Students	12.0.0 Updates – Updated screenshot
1/20/11	Beginning	Fix typo
11/24/10	Enable Address Standardization and Address Verification	Updated screenshot

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Address Verification: *The following steps must be completed to enable and set up Address Standardization and Verification. Once enabled, Address Standardization will run on most Address fields, while Address Verification will run on Student Registration and Student Profile Address fields.*

Unless otherwise noted, see the SI Getting Started End User Documentation for details.

Address Standardization is the process of converting an entered address to standardized USPS address format: removing punctuation, using standard abbreviations, and using the correct Zip+4 Code. Address Standardization has additional benefits, such as easier and more accurate mailing labels, consistency across the application, and enhanced search capabilities.

Address Verification is the process of checking a standardized address against a database of addresses defined as being within a given school district, to make sure that students living in those addresses are attending the correct district. To use Address Verification, you must have enabled Address Standardization. **Note:** Address Verification is optional, and does not function until you have enabled it at both the District and Building levels.

When Address Standardization/Verification is enabled, address fields on the Edit Student Profile and Registration Wizard will display a caution icon and Validate button next to the address fields after a user enters a new address in any set of address fields. Address fields on the Contact and Staff pages will process the address when you enter a Zip Code and leave the Zip Code field by clicking elsewhere on the screen, or by hitting the Tab key to advance to the next field. Address fields that use Address Standardization or Address Verification also include a Bypass Address Standardization or Bypass Address Standardization/ Verification checkbox nearby. Clicking on this check-box will disable Standardization and/or Verification for that address only. This should only be used if you are certain that an address is accurate, but the address will not Standardize or Verify correctly.

-
- ☐ **View District Addresses** (District Level) – Enter all addresses which are considered valid for the District. The fields in the top portion of this screen act as Search criteria for the Local Search and State Search buttons. Enter any criteria you wish (you must enter a Zip Code) and click either Search button to see a list of addresses matching those criteria.

Navigation: StudentInformation – SIS – School – Address Verification – District Addresses

View/Edit District Addresses - List
From this screen, you can search the list of valid district addresses.

Local/State Search Criteria

Start Number: Stop Number:

Pattern:

Pre-Direction: Street Name: Post-Direction:

Zip Code: ⚡ Street Type:

Voting Area/Place: Progression Track:

Once addresses are viewable, you can select individual addresses with the checkboxes, or select all addresses with the checkbox in the grid title bar, and click the Edit Selected or Delete Selected buttons to edit or delete all entries with their checkboxes selected. You can view and edit selected information for a single entry by clicking the magnifying glass icon next to that entry, or delete an entry by clicking the X icon next to that entry.

View/Edit District Addresses - List

From this screen, you can search the list of valid district addresses.

Local/State Search Criteria

Start Number:	<input type="text"/>	Stop Number:	<input type="text"/>
Pattern:	<input type="text" value="Every Number"/>		
Pre-Direction:	<input type="text"/>	Street Name:	<input type="text"/>
Zip Code:	<input type="text" value="45804"/>	Street Type:	<input type="text"/>
Voting Area/Place:	<input type="text"/>	Progression Track:	<input type="text"/>
			<input type="button" value="Local Search"/> <input type="button" value="State Search"/>

<input type="checkbox"/>			Address ^	City	State	Zip Code
<input type="checkbox"/>			100 S Main St	Lima	OH	45804
<input type="checkbox"/>			102 S Main St	Lima	OH	45804
<input type="checkbox"/>			104 S Main St	Lima	OH	45804
<input type="checkbox"/>			106 S Main St	Lima	OH	45804
<input type="checkbox"/>			108 S Main St	Lima	OH	45804
<input type="checkbox"/>			110 S Main St	Lima	OH	45804

☒ Show Active Only

- ☐ **Enter a Range of District Addresses** (District Level) – Click the Add Single Address button or the Add New Address Range button to enter an address or range of addresses. The Add New Address Range button will generate single entries for every address number in the range. For ranges, you can select a pattern of address numbers: Every Number, Odd Numbers, Even Numbers, or Other (which displays an extra field: Every, with a number-entry field, so you could enter, for example, Every 4).

Navigation: StudentInformation – SIS – School – Address Verification – District Addresses – Add New Address Range button

View/Edit District Addresses - Add Range
From this screen, you can add addresses to the list of valid district addresses.

Start Number:

Stop Number:

Pattern:

Street Pre-Direction:

Street Post-Direction:

Street Name:

Street Type:

City:

State:

Zip Code:

Building Progression Track:

Voting Area/Place:

Date Added to District:

Date Removed from District:

Comments:

- ☐ **Enter a District Address** (District Level) – As Add Range, above, but only permits a single address number.

Navigation: StudentInformation – SIS – School – Address Verification – District Addresses – Add Single Address button

View/Edit District Addresses - Add

From this screen, you can add addresses to the list of valid district addresses.

Street Number:	<input type="text"/>	
Street Pre-Direction:	<input type="text" value="v"/>	
Street Name:	<input type="text"/>	
Street Type:	<input type="text" value="v"/>	
City:	<input type="text"/>	
State:	<input type="text" value="OH"/>	<input type="text" value="v"/>
Zip Code:	<input type="text"/>	

Building Progression Track:	<input type="text" value="v"/>
Voting Area/Place:	<input type="text" value="v"/>
Date Added to District:	<input type="text"/>
Date Removed from District:	<input type="text"/>
Comments:	<input type="text"/>

- ☐ **Edit Information on Address Entries** (District Level) – By clicking on the View Details icon (magnifying glass) next to an Address entry, you can view and edit some information about that address: the associated Building Progression Track, Voting Area/Place, Date Added, Date Removed, and any Comments associated with that Address entry.

Navigation: StudentInformation – SIS – School – Address Verification – District Addresses – View Details icon (magnifying glass)

View/Edit District Addresses - Edit
From this screen, you can edit individual valid district addresses.

100 S Main St
Lima, OH 45804

Building Progression Track:

Voting Area/Place:

Date Added:

Date Removed:

Comments:

Once District Addresses are entered, Address Verification should process correctly.

- ☐ **Enable Address Standardization and Address Verification** (District and Building Levels) – You must enable Address Standardization and Address Verification at the District and Building Levels. If either option is enabled at the Building Level, but not at the District Level, that feature will not function. You must have Address Standardization enabled to use Address Verification.

Navigation: StudentInformation – Management – School Administration – School Building Administration – School Demographics

School Demographics
This page is used to manage the demographic information for your school

School Code:	<input type="text"/>	School Name:	<input type="text" value="HIGH SCHOOL"/>
School Type:	<input type="text" value="School"/>	School Subtype:	<input type="text" value="-- Select a School Subtype --"/>
IRN:	<input type="text" value="02"/>	Principal:	<input type="text" value="Mr."/>
Website URL:	<input type="text"/>	District:	<input type="text"/>
ThinkGate School Type:	<input type="text" value="High School"/>		
Use Address Standardization:	<input checked="" type="checkbox"/>	Use Address Verification:	<input checked="" type="checkbox"/>
Telephone:	<input type="text" value="(419)"/>	Fax:	<input type="text"/>
Address:	<input type="text" value="630 AVENUE"/>	City:	<input type="text"/>
State:	<input type="text" value="OH"/>	Zip:	<input type="text"/>
Feedback Email:	<input type="text"/>		
Comment:	<input type="text"/>		
Progress Book On:	<input checked="" type="checkbox"/>		
JVS Integration On:	<input type="checkbox"/>		
	Select JVS Satellite School: <input type="text" value="Select ..."/>		
EZ Query Display Options:	<input type="checkbox"/> Hide Absence Reasons <input type="checkbox"/> Hide Absence Notes <input type="checkbox"/> Hide Absence Comments		
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

Note: Also, the web.config file needs to have the VerificationEnabled key set to “true” as shown in bold in the example below:

```
<AddressVerification>
  <add key="ServiceObjectsLicenseKey" value="XXX-XXXX-XXXX"/>
  <add key="StandardizationEnabled" value="true"/>
  <add key="VerificationEnabled" value="true"/>
</AddressVerification>
```

- ☐ **Register Students** – See the Student Registration Procedural Checklist for the pre-registration process. When you register each student, a caution icon and Validate button will display next to the address fields after a user enters a new address in any set of address fields. Address Standardization and Verification will process on that student's Residence Address when you click the Validate button.

Navigation: StudentInformation – SIS – Registration Wizard

Student Registration Wizard
From this screen users can register students

Address of Residence (For Address Verification)

Street: ⚡ ⚠

City, State, Zip: ⚡ ⚡ ⚡

☐ Bypass Address Standardization/Verification

If you check the “Bypass Address Standardization/Verification” check-box, a new “Bypass Comments” will display, and require you to enter the reason you bypassed Address Verification for the student.

☒ Bypass Address Standardization/Verification ☐ Bypass Address Standardization

Bypass Comments: ⚡

☐ **Check Individual Address Standardization/Verification Errors for a Student –**

Once the Registration Wizard screen processes Address Standardization/Verification, an icon will display beside the Address fields indicating the success of the process. A blue question mark indicates Standardization and Verification in progress, while a red “X” indicates a Standardization or Verification error, and a green check-mark indicates successful Standardization and Verification. Errors and reasons for errors will display.

Navigation: StudentInformation – SIS – Registration Wizard

The screenshot shows a web form titled "Address of Residence (For Address Verification)". It contains the following fields and elements:

- Street:** A text input field containing "PO BOX 100". To its right is a red circle with a white "X" icon, indicating an error.
- City, State, Zip:** Three input fields. The first contains "Lima", the second is a dropdown menu showing "OH", and the third contains "45802-0100". Each of these three fields has a yellow lightning bolt icon to its right, indicating a warning or error.
- Bypass Address Standardization/Verification:** A checkbox that is currently unchecked.
- Message:** A text block stating: "This address was standardized successfully but is not within the district. You may Bypass Address Verification to allow this address to be saved for the student." Below this, it says: "Additionally, you can lookup the correct school district for the student's address on the [Ohio Department of Taxation](#) web site."

This is a Verification error (“... standardized successfully but is not within the district.”). To fix this, you can:


- Add this address to the District Addresses screen (see above);
- Check the “Bypass Address Standardization/Verification” checkbox on the Registration Wizard screen, entering a reason for the bypass in the “Bypass Comment” field; or
- Click the “Ohio Department of Taxation” link to search for this address at the Ohio Department of Taxation’s website, to determine the correct school district for this address.

- ☐ **Review Students Failing Address Verification** – Once students are registered, you can review all students who failed Address Verification by navigating to this screen. You can un-check the “Ignore Bypassed Addresses” check-box to see all unverified addresses. Clicking on an individual student name will take you to that student’s Edit Profile screen, so you can change or Bypass that student’s address.

Navigation: StudentInformation – SIS – School – Address Verification – Failing Students

Students Failing Address Verification

This screen lists students whose address of residence fails Address Verification.

ALTMAN, JANE 120 CHESTNUT STREET OH	Ignore Bypassed Addresses <input checked="" type="checkbox"/> By ignoring bypassed addresses,  students who have been selected to bypass Address Verification will not be included in the list. Please note that a maximum of 250 students will be shown.
BASSNER, DEVON 2250 S AGNER OH	

- ☐ **Check Verification on Existing Students** – If a student is already enrolled, and Address Standardization and Verification have not yet been performed on that student's address, edit that student's profile, a caution icon and Validate button will display next to the address fields. Address Standardization and Verification will process on that student's Residence Address when you click the Validate button.

Navigation: StudentInformation – SIS – Student – Edit Profile – General tab

Edit Student Profile

From this screen, you can display and change information regarding a students profile.

General
Additional
Custom
Private
FS-Standing
FS-Attendance
FD-Attributes
FN-Attributes
FN-Graduate
Transportation

Save
Cancel

Last Modified: 12/29 PM by User:

Student Number: 26345 x ☐ Auto-Assign

Student Status: A - ACTIVE RES

First Name: ERICA

Middle Name: MAE

Last Name: WHITE

Called Name:

Last Name Suffix:

Gender: F

Birthdate: 03/15/1997

Age: 17

Local Ethnic Category: W - WHITE

Verified With:

Hispanic/Latino: N - No, the student is not Hispanic/Latino

Birthplace City: LIMA

Racial Group(s): ☐ A-Asian ☐ B-Black or African American ☐ I-American Indian or Alaska Native ☐ P-Native Hawaiian or Other Pacific Islander ☒ W-White

Summative Race: W - White, Non-Hispanic

Native Language: ENG - English (Default)

Home Language: *** - Neither LEP no

Address of Residence (For Address Verification)

Mailing Address ☐ Use Address of Residence

Street: 1000 E MAIN STREET

Street: PO Box 100

City, State, Zip: LIMA OH 45804

City, State, Zip: LIMA OH 45804

☐ Bypass Address Standardization

☐ Bypass Address Standardization

Phone Number: 5555555555 ☐ Unlisted

Email:

Building Grade: 12 - 12

Grade Next Year: GR - GR

EMIS Grade: 12

EMIS Grade Next Year: GR

Changing the Building Grade does not change the State Equivalent Grade. The FD tab can be used to change the State Equivalent Grade.

Changing the Grade Next Year does not change the EMIS Grade Next Year. The FN tab can be used to change the EMIS Grade Next Year.

Program:

Home school IRN:

Home School:

Attendance Calendar: Default (Default)

Report to EMIS: ☒

- ☐ **View Bypass Log** (optional) – If a student is already enrolled, you can view any Bypass Comments that were entered when the student was registered, or any time that address verification and standardization were bypassed for a student's address. Check the Bypass checkbox if it is not checked, and click the "View Log" link (this will pop up a window showing all Bypass Comments entered).

Navigation: StudentInformation – SIS – Student – Edit Profile – General tab – View Log link

<u>Address of Residence (For Address Verification)</u>		<u>Mailing Address</u> <input type="checkbox"/> Use Address of Residence	
Street:	<input type="text" value="1000 E MAIN STREET"/>		
City, State, Zip:	<input type="text" value="LIMA"/> <input type="text" value="OH"/> <input type="text" value="45804"/>		
<input checked="" type="checkbox"/> Bypass Address Standardization			
Bypass Comments:	<input type="text"/>		View Log

From this screen, you can view the log of comments from bypassing verification of the students address.			
Date:	10/15/2014 9:33:00 AM	User:	Recker, Amy (Amy)
Address:	1000 E MAIN STREET		
City, State, Zip:	LIMA OH 45804		
Bypass Comments:	test bypass comments		