WISEid User Guide

Updated 4/21/2020

This guide is intended to assist users of DPI's WISEid application.

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Access and Security

Obtaining a WAMS ID

In order to use WISEid, you must first obtain a WAMS ID. If you already have access to other DPI applications, you may use that ID and skip this step.

Setting up a WAMS account involves four simple steps:

1. Go to the WAMS homepage: https://on.wisconsin.gov/WAMS/home
2. Select **Self Registration**.
3. Provide the required information.
4. When you receive a confirmation email from the WAMS system, follow the link given to log in and verify your account.

For more detailed information and instructions, please see the WAMS User Guide: dpi.wi.gov/sites/default/files/imce/wisedash/pdf/wams-guide.pdf.

Please note that you should use your work email address when creating your WAMS account, as this system will be used for work purposes. Do not reuse a WAMS account created for ELO (Educator Licensing Online), which is for your personal use and would use your personal, non-work email account. It is acceptable to have more than one WAMS ID.

If the information associated with your WAMS ID needs to be updated, for example, if you have a new email address, please visit the WAMS web site at https://on.wisconsin.gov/WAMS/home and click the Profile Management link.

WAMS ID Password Resets

DPI does not have the ability to reset passwords. If you cannot remember your WAMS ID or password, or if your account is locked, please visit the WAMS web site at https://on.wisconsin.gov/WAMS/home and click the Account Recovery link. You will be sent an email containing a link. Click the link, answer your secret question, and then choose a new password.

Log in through Secure Home

Use your WAMS ID and password to log in to Secure Home (https://apps2.dpi.wi.gov/secure/). **Do not bookmark the Secure Home login screen**. This will cause problems when you try to log in. Instead, please bookmark the Secure Home Information page at http://dpi.wi.gov/wise/secure-home-info. Once you are logged in to Secure Home, the WISEid application will be presented as a clickable link. If you do not see WISEid listed, you do not currently have a user role assigned to you by your district's WISEid Application Administrator(s). **If you do not know who that is, you may send a request for access to your DSA through this link:** https://apps2.dpi.wi.gov/ldsutil/admin/.

For detailed information about Application Security Manager (ASM) and district security roles and responsibilities, please read the Secure Home Information page: http://dpi.wi.gov/wise/secure-home-info. There are links to other materials that may be of assistance, such as user guides and help videos.
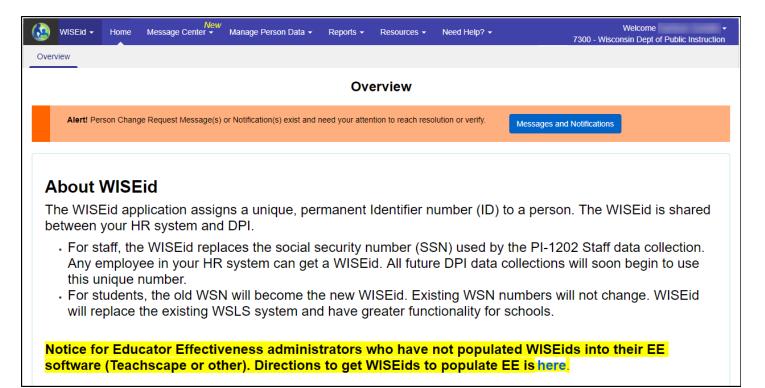
WISEid User Roles

DPIASM WISEIDRoleAdmin – Users granted this role can delegate the two roles below to any WAMS account using Application Security Manager (ASM). **This role does not grant access to WISEid; it is used to assign WISEid access to others**. People with this role are called "WISEid Application Administrators."

WISEID AgencyAdmin – This role grants all the access of the "AgencyDataEntry" role below, plus the ability to perform additional tasks, including updating contact information. At least one person from the school/district should be granted this role.

WISEID AgencyDataEntry – This role has access to the WISEid application and allows the user to perform basic functions, including searching for WISEids and uploading/downloading files.

Home Page

The Home screen provides a menu of the functions available along the top of the screen. If there are important news items or announcements they will be posted on this main page.

Sections

- View notifications and Change Requests in the **Message Center**.
- Use the **Manage Person Data** section to search for or edit a person, as well as work with duplicate IDs or upload and manage data files.
- View reports and manage and validate your data in the **Reports** section.
- Depending on their role, some users may also have access to the **Resources** menu.

Working in WISEid

Uploads

The Upload Person Data option under Manage Person Data allows users with access to upload files into WISEid and to work with them once processed. Uploading a Person record will create WISEids and/or update WISEid data during the process. **It is essential that ALL students and staff have WISEids assigned. It is also imperative that ALL students and any staff members associated to Roster coursework have Local Person IDs assigned as well, so their data can be claimed and linked to your district.**

It's important to note that a WISEid is NOT the same as a Local Person ID, nor does it serve the same function. Assigning a Local Person ID to a student or staff allows a district to "claim" or link the district to that person. This is essential because the person's unique WISEid record is shared among any district associated with that staff or student; therefore, in order to send data for a particular person from your district, you need to assign a Local Person ID. If you don't populate the Local Person ID field, those person records are not pulled during a student or staff download file.

The results of a file upload should be examined and corrected as needed. The information below will guide you through this file upload and examination process.DPI suggests running WISEid File uploads once a week to maintain accurate data within WISEid. This is suggested for both student and staff person uploads. Person uploads are always completed through the WISEid application while Contract and Assignment uploads needed for the WISEstaff collection can be completed through the WISEstaff application.
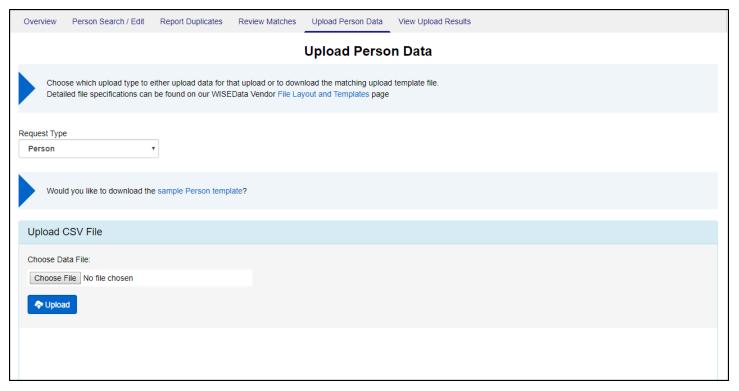
Please note, if you do not have access to WISEstaff, you will not be able to upload a Person file with staff names. To obtain access to WISEstaff, please contact your local WISEstaff security administrator.

If it is the beginning of the school year you can break this into manageable parts. Suggestions include, but are not limited to,

- New students who would not have a WISEid assigned to them yet because they have not been enrolled in a Wisconsin School
- Students new to your school who already have a WISEid
  - Follow the Match Review Section for these students carefully.
- School breakdowns (e.g., Elementary School, Middle School, etc.)

Follow the steps below to complete the file upload process.

1) Download your WISEid file out of your SIS for either your students or your staff members (if you are unsure on how to do this, contact your SIS vendor). This file should be a .CSV file. Save it where you can find it later.

2) Under **Manage Person Data**, select **Upload Person Data**.
3) Click **Choose File** to select your saved .CSV file you downloaded from your SIS.
4) Click **Upload.**

Results

Once you have completed your upload you should check your results to see your data.

- **Type:** This can be Person, Contract, or Assignment. Contracts and Assignments can be uploaded through WISEstaff and reviewed through the Results tab.
- **File Name:** Clicking this hyperlink will show you the file you have uploaded.
- **Status:** This shows you the status of your upload. You cannot work with your data until the status is "completed".
- **Errors:** These are issues within the file that you uploaded; you will need to fix these errors in your file and re-upload a new file to correct them.
- **Potential Matches:** These are possible matches to people whom you have uploaded. The system will check for matching names and birthdates within the WISEid system and then ask you to review to make sure that duplicates are not created.
- **Committed**: This is the number of lines from your file upload that were processed and do not need any manual review.
- **Changes:** This is the number of change requests created from this file upload, for example, a student whose last name has changed. When you upload the student to WISEid with the new last name, the system will create a change request to the student's associated school districts to approve or deny before the change sticks. This process is in place to ensure person record changes are applied correctly prior to writing them to the database.
- **Upload Date:** This identifies when the file was uploaded.
- **User ID**: This identifies who uploaded the file.
- **Download:** This button allows you to download your committed file. If WISEids are newly assigned to students, you should download this file and upload it into your SIS.

Working Through your Results

Errors

If you have an error, you will need to click on the blue box with a number in it. This will bring you to your Person Error Review Screen (shown below). You can see the details of the error by clicking the **[+]** to the left of the row number. You should make your corrections within your student information system (SIS), download a new file with corrected records in a .CSV file, and re-upload the records to WISEid. Remember to save your upload file on your hard drive for future reference. Corrections must be made in the .CSV file saved to your computer and re-uploaded to WISEid. After the error has been corrected and your upload has finished processing, errors on your new upload should appear as "0".

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

Person Error Review

	Row Number In File	Local Person Id	First Name	Last Name
▶	2	124		

|◀ ◀ **1** ▶ ▶| 1 - 1 of 1 items

Download Errors

Review Matches

Once persons have been uploaded, they will go through the match review process. This helps to determine if persons already have a WISEid and should be linked to that WISEid. You can get to your Potential Matches by clicking the blue box from your results menu or from the File Tasks Menu on the left.

1) Click **Review** for the person who has a potential match.

2) A new screen will pop up. The top box will show what you have uploaded. Below this box will display existing people who look similar. In the bottom box you will notice green squares. These squares show you boxes that match what you have uploaded. Be careful when matching; a name matching doesn't mean it is the same person, verify the birth date as well. If you aren't certain, check other information available to verify the match.

Here are the existing people that look similar:

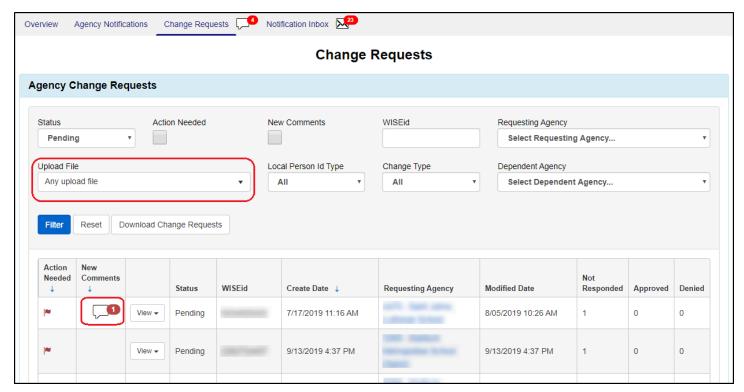|		WISEid	Local person ID	Local person ID type	First name	Middle name	Last name	Suffix	Gender	Birthdate	Multiple Birth Indicator	Race/ Ethnicity	Entity ID	Report Duplicate
▲	○								Female	05/03/2005		0005 ⓘ		☐

Parent / Guardian(s)

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

Birth Location

Birth City	Birth State	Birth County	Birth Country

Enrollments

Enroll Date	Exit Date	District Agency Name	School Agency Name	Grade
8/13/2018	5/23/2019	3619 - Milwaukee School District	Lincoln Mid	07
8/21/2017	5/18/2018	3619 - Milwaukee School District	Lincoln Mid	06

Other Name(s)

First Name	Middle Name	Last Name	Suffix

3) If you believe you have a match, click the radio button next to the existing match and then click **Next**. This will combine your upload with the existing record.

4) If the existing records do not match your person, select the **Create a new person** radio button and then click **Next**. This will create a new WISEid for your uploaded person.
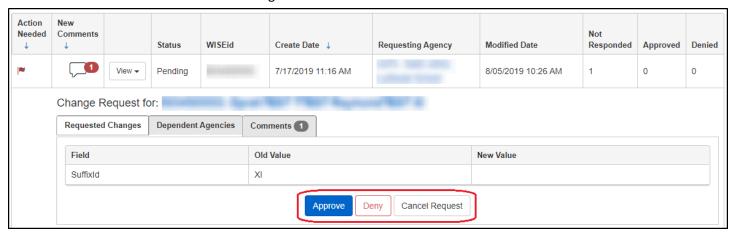
Changes/Change Requests

You can get to this screen by selecting Change Requests under the Message Center.

Once in the Change Requests screen, you will see a listing of change requests. Requests with a red flag mean they are waiting on your district for action. You can also filter this listing by Upload File to see change requests that you have created for other districts to review.

To see more about the request, click **View** and the request will expand. Here you can see the requested change. Before denying a request, you need to enter in a comment about why you are denying it. Conversations can happen in the comments sections to determine if the change is correct or not.

When Should you Deny a Change Request?

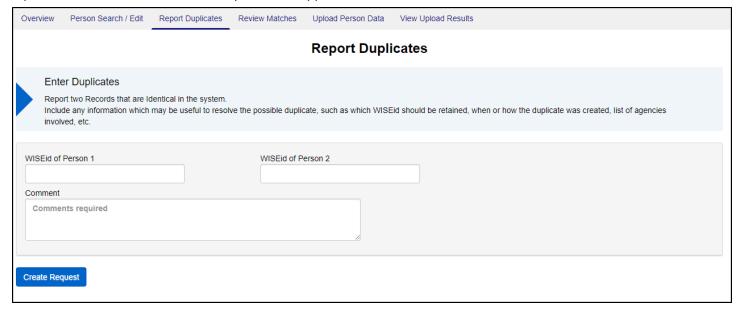Change requests should only be denied when you have legal documentation proving that the request is incorrect (for example, a Birth Certificate). Race changes are up to parent choice and should not be denied unless you believe that incorrect persons may be linked together. If you believe that two persons are incorrectly linked, please create a Help Desk Ticket and a WISEsupport member can help you separate the people.

Download Transaction History

This button allows you to download any information uploaded into the WISEid system for your school district between certain dates.
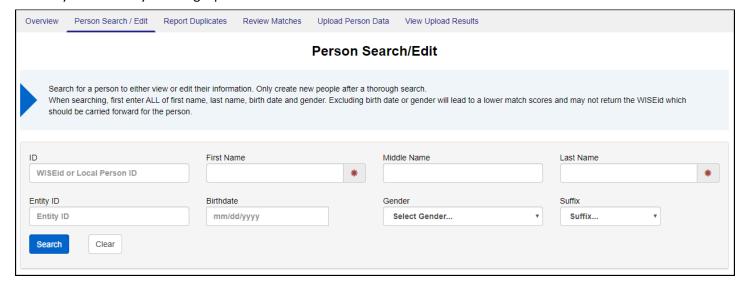
Report Duplicates

If you find that one person has two different WISEids associated, you should report the WISEids as duplicates. To report duplicates, go to the Report Duplicates screen under Manage Person Data. Type the two WISEids into the boxes and explain in the comment section what you think happened, as well as which WISEid should be retained.

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

Report Duplicates

Enter Duplicates

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

WISEid of Person 1

WISEid of Person 2

Comment

Comments required

Create Request

Person Search/Edit

This feature allows you to look up persons by entering known information about them and clicking **Search**. You can search by WISEid or by entering a person's first and last name.

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

Person Search/Edit

Search for a person to either view or edit their information. Only create new people after a thorough search.
When searching, first enter ALL of first name, last name, birth date and gender. Excluding birth date or gender will lead to a lower match scores and may not return the WISEid which should be carried forward for the person.

ID
WISEid or Local Person ID

First Name *

Middle Name

Last Name *

Entity ID
Entity ID

Birthdate
mm/dd/yyyy

Gender
Select Gender...

Suffix
Suffix...

Search   Clear

Person suggestions will show below your search. Green highlighted boxes match your search criteria as entered. You can click the **[+]** to expand more summary details or click the WISEid number to see the full details about the person.

Helpful Search Tips

The WISEid search engine is very reliable, but there are times when a search may prove difficult. It is possible that the person for whom you are searching may have incorrect information or information appearing differently than expected. Here are some things to keep in mind as you search:

Middle Name: This field is not always populated or only contains an initial, which may or may not include a period. If you are having difficulty searching, leaving this field blank may help, or you may try common variations of names (e.g., "Bobbie" instead of "Bobby").

Last Name: Hyphenated/multiple last names can sometimes make a search difficult. If you are having trouble searching, entering only one of the last names may help.

Misspellings: Occasionally names are misspelled. Sometimes searching with common misspellings may help.
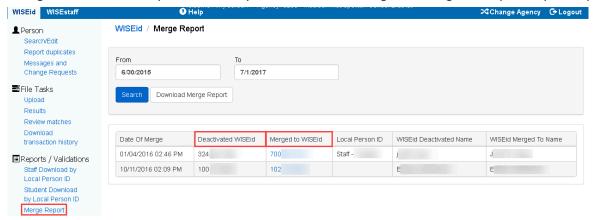
Reports

Staff Download by Local Person ID
This report will automatically download into a .CSV file when clicked. Within this file you can see ALL staff who have ever been uploaded by your district. These staff will be sorted by Local Person ID.

Student Download by Local Person ID
This report will automatically download into a .CSV file when clicked. Within this file you can see ALL students who have ever been uploaded by your district. These students will be sorted by Local Person ID.

Merge Report
When a date range is entered, this report will show you WISEids that have gone through the report duplicate process.

Resources Menu

Update Contact Info

The agency administrator updates WISEstaff system contact information here. Both Primary and Secondary Contacts are **required** for each agency and must be updated each year. Use the **Edit** or **Delete** icons to the right of the email address to make changes or delete a contact.