



NJSLEDS ID Change Management Training

A Guide for SMID Merge Requests

NJSLEDS Project Team
Office of Information Technology

Updated: February 2026

nj.gov/education/sleds



Agenda



1. Critical Submission Disclaimer
2. Merge Requests
3. Submission Process
4. Common Mistakes
5. Best Practices



Critical Disclaimer

Do This:

- Submit through the NJSLEDS web-to-case Help Desk form **only**
- Use the “Contact Help Desk” button on the NJSLEDS system homepage
- Attach the completed Excel template to your form

Never Do This:

- Send requests by email
- Send change requests and merge requests in one ticket/file
- Include personally identifiable information (PII) in emails
- Attach birth certificates or other legal documentation (**not** required)



Merge Requests

Section Overview

What We'll Cover:

- ✓ What is a Merge?
- ✓ When to Use Merge
- ✓ When Not to Merge
- ✓ Download the Excel Template
- ✓ Open the Correct Tab
- ✓ Required Fields Explanation
- ✓ Step-by-Step Template Completion
- ✓ Real Examples
- ✓ Review Checklist



What is a Merge?

Definition: Combine two or more SMIDs for the same staff member into **one** SMID.

What Happens:

- One SMID stays active (you choose which)
- Other SMIDs are retired/inactivated
- All data consolidated under Merged SMID

Warning: Merges are permanent and cannot be undone.

SMID You Keep:

- Retains all historical data
- Stays active
- Used going forward

SMIDs You Don't Keep:

- Retired/inactive
- Data moves to merged SMID
- Can't be reactivated



To Merge or Not to Merge

When to Merge:

Staff Member Transferred:

- Moved from District A to District B
- District B created new SMID instead of using existing

Data Entry Error:

- User clicked “Create New SMID” instead of matching
- Spelling variation caused duplicate

When Not To Merge:

Different Staff Members:

- Two staff members with similar names
- False match (wrong DOB or name)

One Record Wrong:

- Use Field Change instead
- Then they’ll match automatically

Records Shouldn’t Exist:

- Use Delete instead
- Then no merge needed

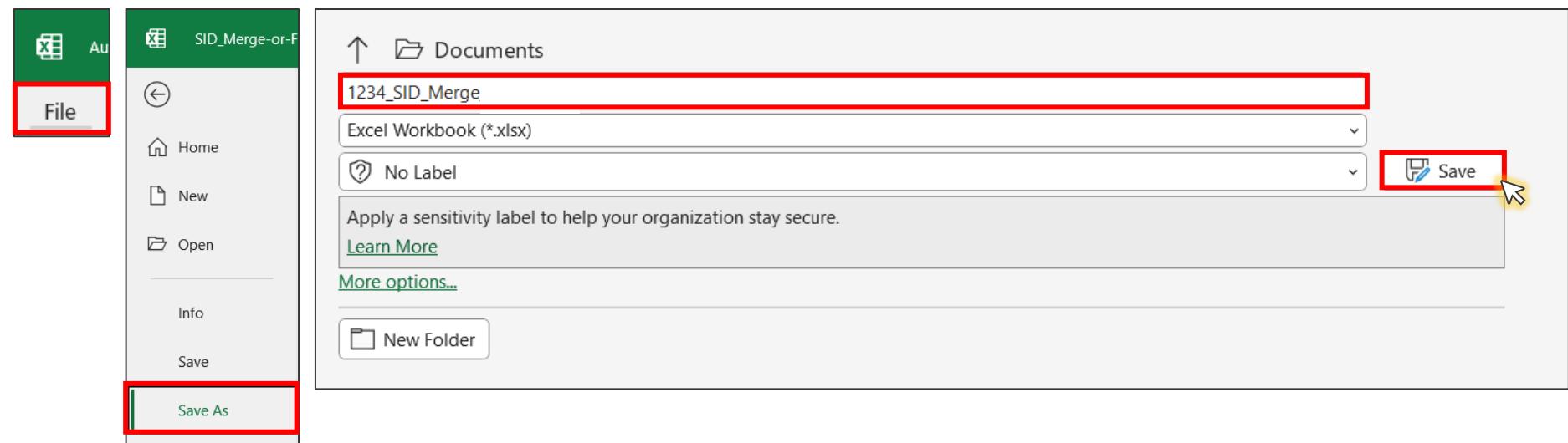


Download the Excel Template

1. Download the [SMID_Merge_Request](#) Excel template.
2. Immediately save a copy: (replace XXXX with your 4-digit district ID)
XXXX_SMID_Merge.xlsx

Example: 1234_SMID_Merge.xlsx

⚠ Why rename? When we receive hundreds of files all named the same, it makes it more difficult to track which district sent what.



Understanding the Template Structure

You Must Fill:

- Date of Request
- First Name
- Last Name
- SMID #1 + District Code #1
- SMID #2 + District Code #2
- SMID to Keep
- Comments (confirmation)

Optional Fields:

- SMID #3 + District Code #3
- SMID #4 + District Code #4

Date of Request	First Name	Last Name	SMID #1	District Code #1	SMID #2	District Code #2	SMID #3	District Code #3	SMID #4	District Code #4	SMID to Keep
20251016	MARTIN	MERGE	11122233	1111	55566677	2222					11122233
20251016	MOLLY	MERGE	22233344	1111	44433322	2222					44433322
20251016	MARGE	MERGE	66655577	3333	99900099	2222	9999...	1111			99999999



Required Fields: Date of Request

Format: YYYYMMDD (8 digits)

Example:

Date of Request	First Name	Last Name	SMID #1	District Code #1	SMID #2	District Code #2	SMID #3	District Code #3	SMID #4	District Code #4	SMID to Keep
20251016											
20251016											
20251016											



Required Fields: First and Last Name

What to Enter: Staff member's first name and last name as reported in NJSLEDS

Example:

Date of Request	First Name	Last Name	SMID #1	District Code #1	SMID #2	District Code #2	SMID #3	District Code #3	SMID #4	District Code #4	SMID to Keep
20251016	MARTIN	MERGE									
20251016	MOLLY	MERGE									
20251016	MARGE	MERGE									

Tips:

- Should match across all SMIDs
- If slightly different, use most common version
- Explain variation in comments



Required Fields: SMID #1 and District Code #1

What to Enter:

- **SMID #1:** 8-digit Staff Member Identifier
- **District Code #1:** 4-digit district code associated with SMID #1

Example:

Date of Request	First Name	Last Name	SMID #1	District Code #1	SMID #2	District Code #2	SMID #3	District Code #3	SMID #4	District Code #4	SMID to Keep
20251016	MARTIN	MERGE	11122233	1111							
20251016	MOLLY	MERGE	22233344	1111							
20251016	MARGE	MERGE	66655577	3333							



Required Fields: SMID #2 and District Code #2

What to Enter:

- **SMID #2:** Second 8-digit Staff Member Identifier
- **District Code #2:** 4-digit district code associated with SMID #2

Example:

Date of Request	First Name	Last Name	SMID #1	District Code #1	SMID #2	District Code #2	SMID #3	District Code #3	SMID #4	District Code #4	SMID to Keep
20251016	MARTIN	MERGE	11122233	1111	55566677	2222					
20251016	MOLLY	MERGE	22233344	1111	44433322	2222					
20251016	MARGE	MERGE	66655577	3333	99900099	2222					



Optional Fields: SMID #3 and District Code #3

What to Fill: Only if staff member has a third SMID

If Not Needed: Leave blank

If Needed:

- **SMID #3:** Third 8-digit SMID for same staff member
- **District Code #3:** 4-digit district code associated with SMID #3

Date of Request	First Name	Last Name	SMID #1	District Code #1	SMID #2	District Code #2	SMID #3	District Code #3	SMID #4	District Code #4	SMID to Keep
20251016	MARTIN	MERGE	11122233	1111	55566677	2222					
20251016	MOLLY	MERGE	22233344	1111	44433322	2222					
20251016	MARGE	MERGE	66655577	3333	99900099	2222	9999...	1111			



Optional Fields: SMID #4 and District Code #4

What to Fill: Only if staff member has a fourth SMID (*rare*)

If Not Needed: Leave blank

If Needed:

- **SMID #4:** Fourth 8-digit SMID for same staff member
- **District Code #4:** 4-digit district code associated with SMID #4

Date of Request	First Name	Last Name	SMID #1	District Code #1	SMID #2	District Code #2	SMID #3	District Code #3	SMID #4	District Code #4	SMID to Keep
20251016	MARTIN	MERGE	11122233	1111	55566677	2222					
20251016	MOLLY	MERGE	22233344	1111	44433322	2222					
20251016	MARGE	MERGE	66655577	3333	99900099	2222	9999...	1111			



Required Fields: SMID to Keep

What to Enter: The SMID you want to remain active

Example:

Date of Request	First Name	Last Name	SMID #1	District Code #1	SMID #2	District Code #2	SMID #3	District Code #3	SMID #4	District Code #4	SMID to Keep
20251016	MARTIN	MERGE	11122233	1111	55566677	2222					11122233
20251016	MOLLY	MERGE	22233344	1111	44433322	2222					44433322
20251016	MARGE	MERGE	66655577	3333	99900099	2222	9999...	1111			99999999

⚠ Critical:

- Must match one of the SMIDs listed above
- This SMID keeps all data
- Others are retired
- Choose carefully

Tip: Usually keep the oldest/original SMID



Merge Request Examples

Scenario: Staff member moved districts mid-year, got duplicate SMID

Template:

Date of Request	First Name	Last Name	SMID #1	District Code #1	SMID #2	District Code #2	SMID #3	District Code #3	SMID #4	District Code #4	SMID to Keep	Cohort Year
20251016	MARTIN	MERGE	1112223334	1111	5556667778	2222					1112223334	2027

Scenario: Staff member was mistakenly assigned three SMIDs

Template:

Date of Request	First Name	Last Name	SMID #1	District Code #1	SMID #2	District Code #2	SMID #3	District Code #3	SMID #4	District Code #4	SMID to Keep	Cohort Year
20251016	MARGE	MERGE	6665557778	3333	9990009998	2222	9999...	1111			9999999999	2026



Merge Request Checklist

Before Moving to Submission:

- Are your dates entered in YYYYMMDD format?
- Are your First and Last Name fields filled out correctly?
- Are all applicable SMIDs filled out (minimum of 2)?
- Do you have all merge requests in one file vs. individual files per staff member?
- Are all district codes filled out?
- Are all SMIDs to keep matching a code listed above?
- Are all SMIDs to keep the correct choice?
- Is your confirmation statement included in the Comments section?
- Is the file saved with the district code in its name?



Submission Process

Section Overview

- Step 1: Access the Help Desk Web-to-Case Form
- Step 2: Fill Contact Information
- Step 3: Select Request Type
- Step 4: Write Details
- Step 5: Upload Excel file
- Step 6: Final Review
- Step 7: Submit Request



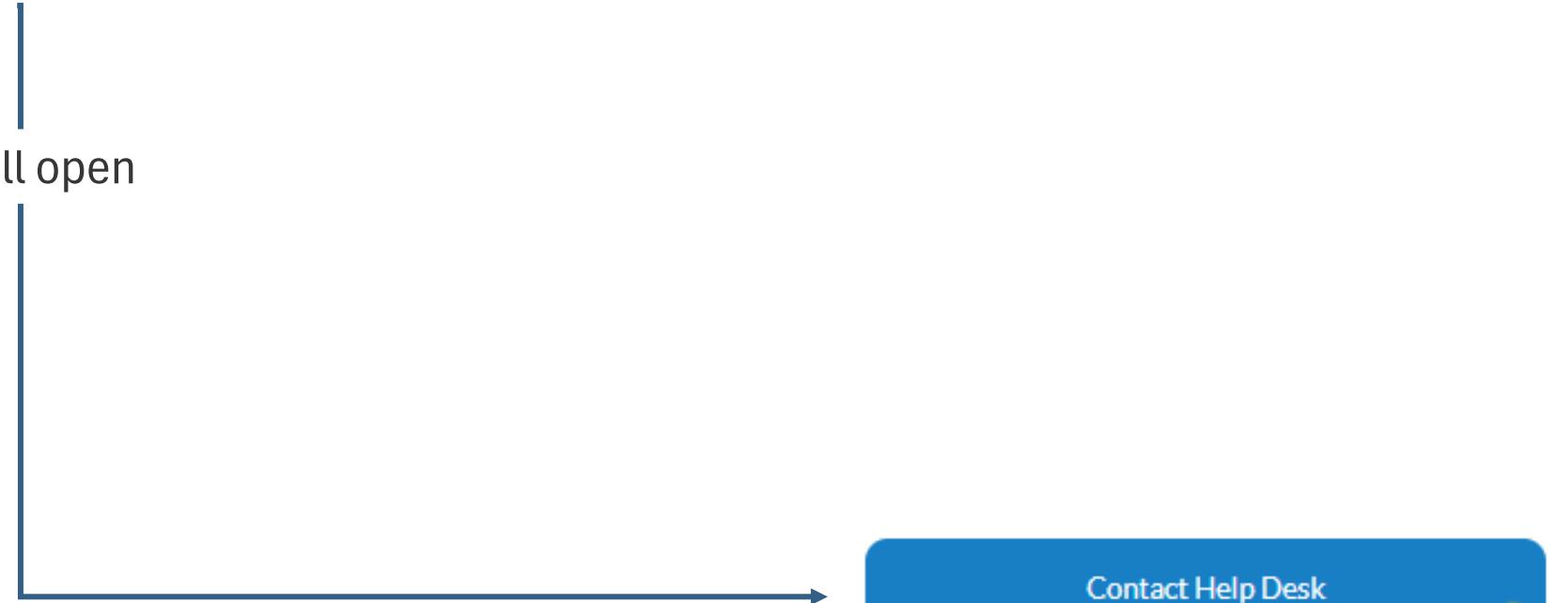
Step 1: Access the Help Desk Web-To-Case Form

Instructions:

1. Go to <https://www.nj.gov/education/sleds>
2. Click on the link on the home page to log into NJSLEDS through [myNJ](#)
3. Look for the blue “Contact Help Desk” button on the NJSLEDS system home page, in the lower righthand corner of the screen
4. Click the button
5. The Help Desk web form will open



[nj.gov/education](https://www.nj.gov/education)



Step 2: Fill Contact Information

Required Fields:

- Your name, email, and District ID will auto-populate from your account details
- You will be required to enter your phone number

* Name	<input type="text" value="Your full name"/>		
* Email	<input type="text" value="your.email@district.k12.nj.us"/>		
* District ID	* Phone 	Phone Extension 	
<input type="text" value="Your 4-digit code"/>	<input type="text" value="609-555-1234"/>	<input type="text" value="1234"/>	



Step 3: Select Request Type

Select Request Type:

- Select “ID Change Management” in the Type dropdown
- Select “Change Request (First Name, Last Name, etc.)” in Sub Type
- Select “Staff Management” in Sub Category

* Type

ID Change Management

* Sub Type

Merge Request

* Sub Category

Staff Management



Step 4: Write Details

* Details

Upload Files

Or drop files

Cancel

Submit



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Step 5: Upload Excel Process

Instructions:

1. Scroll down to the “Upload Files” button
2. Click the “Upload Files” button
3. Browse to your saved file
4. Select the file
5. Wait for upload confirmation
6. Verify file name appears

*Type
ID Change Management

*Sub Type
Change Request (First Name, Last Name, etc)

*Sub Category
Staff Management

*Details

Upload Files Or drop files

Upload Files Or drop files

Cancel Submit



Step 6: Final Review

Check Everything:

- Is your contact information correct?
- Is the Type set to “ID Change Management”?
- Is the Sub Type set to “Merge Request”?
- Is the Sub Category set to “Staff Management”?
- Do the details clearly explain the request?
- Did the Excel file load properly?
- Is the file name showing correctly?

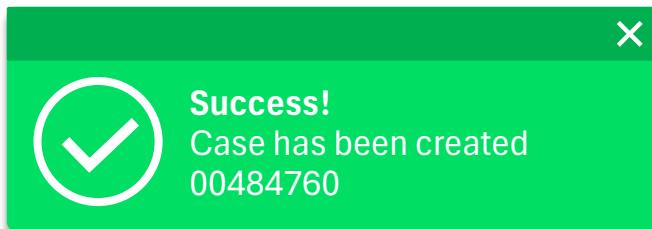


Step 7: Submit Request

Quickly double-check all form fields:

- Is your contact info correct?
- Are the request types selected properly?
- Is the correct file attached?

Click the ‘Submit’ button once. Wait for the confirmation pop-up with your case number to appear. Your case will be accessible via the “View All Cases” button on the system homepage for reference and updates.



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What Happens Next?



Review Your Case Status: The case will be available for reference on the “View All Cases” page.



Wait for Confirmation: You will receive an email when the change is complete.



Timeline: This process takes approximately 2 weeks. Please do not submit duplicate tickets checking in on status.



Common Mistakes

1. Incomplete Information

 **Problem:** Leaving required fields blank

 **Solution:**

- Fill all required fields
- Look up staff member in NJSLEDS system first
- Helps verify correct record

2. Wrong Date Format

 **Problem:** Using MM/DD/YYYY, adding dashes, etc.

 **Solution:**

- Always use YYYYMMDD

Wrong:

- ~~10/16/2025~~
- ~~2025-10-16~~

Right:

-  20251016



Common Mistakes

3. Wrong SMID

 **Problem:** Typo in SMID = wrong staff member affected

 **Solution:**

- Copy/paste SMID from NJSLEDS exports
- Double-check every digit
- Have colleague verify
- One digit wrong = a problem

4. Emailing Request

 **Problem:** Sending Excel via email instead of submitting the web form

 **Solution:**

- Never email requests
- Always use the web-to-case form in the NJSLEDS system
- Email requests are not processed
- Do not send personally identifiable information (PII) via email



Common Mistakes

5. Merges/Changes/Deletes in Same File

 **Problem:** Submitting a merge, delete, and/or a change request in the same file/ticket.

 **Solution:**

- Merge, delete, and change requests must be sent as separate files in separate tickets
- Please resubmit your requests with the proper routing

6. Details in Case Instead of Excel

 **Problem:** Entering merge requests in Case Details text field without attaching Excel file

 **Solution:**

- Always complete the Excel template
- Attach the completed Excel file to your case
- Do not type merge request details in the Case Details field
- Without Excel file = weeks of delay + resubmission required



Common Mistakes

7. Special Characters in File Name

 **Problem:** Using special characters like \$ or ‘ in Excel file names causes file corruption and cannot be opened

 **Solution:**

- Do not use special characters like \$, ‘, ; or others
- File becomes corrupted and Help Desk cannot open it
- Use only: letters, numbers, hyphens (-), underscores (_)
- Good: 1234_SMID_Merge.xlsx
- Bad: 1234_SMID_\$Merge'.xlsx



Best Practices

Verify Before Submitting:

- Look up staff member in the NJSLEDS system first
- Confirm current information
- Double-check SMID numbers

Keep Records:

- Save copy of Excel file (very important)
- Save case number
- Save confirmation email

Respond Promptly:

- Check email for updates
- Answer Help Desk questions



Contact Information

Website: <https://www.nj.gov/education/sleds>

Submit Requests: Web-to-case Help Desk form **only**

General Email: njsleds@doe.nj.gov

(This email is for general inquiries only. To create a Help Desk ticket, use the "Contact Help Desk" button on the NJSLEDS system homepage.)

Important Reminders:

✖ Do Not:

- Email requests
- Send PII via email
- Attach birth certificates or other legal documentation
- Delete inactive staff members

✓ Do:

- Use the web-to-case Help Desk form
- Complete the Excel template fully
- Double-check SMID numbers
- Save case number
- Keep records



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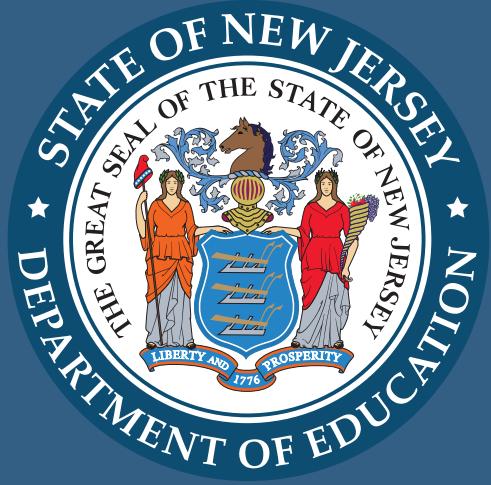
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Thank You

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