

Steps to Generate the Duplicate Student Records Report

Matching Fields = ID

- The same **ID** at multiple sites is OK if all other demographic information is the *same*.
- The same **ID** at multiple sites is NOT OK if demographic information is *different*.

Matching Fields = Gender and/or Birth Date

- Two or more records of a student with matching **Gender** and/or **Birth Date** but with *different* IDs at the same site are NOT OK and, therefore a Duplicate Student whose records must be merged.
- This is the most common scenario for duplicate records of the same student.

Follow these basic steps to generate reports based on these scenarios.

Access: TE > Reports > Data Management > Duplicate Students

Step	Screen	Description
1.		<ul style="list-style-type: none"> • From the Menu Bar at the top, <ul style="list-style-type: none"> ○ Click Reports. • From the Data Management menu, <ul style="list-style-type: none"> ○ Select Duplicate Students.
2.		<ul style="list-style-type: none"> • A tabbed page opens to the Report Generator.

Step	Screen	Description
3.		<ol style="list-style-type: none"> 1. The Report Setup Screen is similar to other reports. General Settings and Listers will vary depending on the type of report. 2. The Report Setup Navigator is on the left side of the Report Setup Viewer on the right. Use the navigator to refine the data you want to show in your report. 3. The Report Setup Toolbar is located at the top of the Report Setup Screen. Use it to specify container information at the agency or site level, save report settings, and run the report.
4.		<p>Most duplicated records are identified from the following two scenarios:</p> <ol style="list-style-type: none"> A. When a student enters a program with one ID and then re-enters the program with a different ID, they have the same demographic information, such as gender and date of birth. B. When different students at different sites use the same student ID.
5.		<p>FOR SCENARIO: A</p> <ul style="list-style-type: none"> • From General Settings, <ul style="list-style-type: none"> ○ Scroll to Special Options. • For Matching Fields, <ul style="list-style-type: none"> ○ Select Gender and Birth Date. • For Non-Matching Fields, <ul style="list-style-type: none"> ○ Select Student ID. • Skip to Step 7, on the next page.

Step	Screen	Description
6.		<p>FOR SCENARIO: B</p> <ul style="list-style-type: none"> From General Settings, <ul style="list-style-type: none"> Scroll to Special Options. For Matching Fields, <ul style="list-style-type: none"> Select Student ID. For Non-Matching Fields, <ul style="list-style-type: none"> Select Gender and Birth Date.
7.		<ul style="list-style-type: none"> From the Toolbar at the top, <ul style="list-style-type: none"> Click Generate. A new tabbed page opens to the Duplicate Students report. <ul style="list-style-type: none"> The total possible Duplicated Count is at the top right of each page.
8.	<p style="text-align: center;">FOR SCENARIO: A</p> <ul style="list-style-type: none"> Records are filtered by Birth Date. 	<p style="text-align: center;">FOR SCENARIO: B</p> <ul style="list-style-type: none"> Records are filtered by Student ID.

Step	Screen	Description
9.		<ul style="list-style-type: none"> To confirm if records are Duplicates, <ul style="list-style-type: none"> Check for matching demographic information.
10.		<ul style="list-style-type: none"> To fix duplicate records, use the Drill-Down function. <ul style="list-style-type: none"> Click the Name on the record with the incorrect ID. <p><i>Note!</i> Use the Merge Wizard when duplicate records are at the same site.</p>
11.		<ul style="list-style-type: none"> Double-click to open the duplicate record shown on the list.
12.		<ul style="list-style-type: none"> This drills down to the student Demographics record, the “parent” record for all student-related records. Editing the ID will simultaneously edit the ID on all “child” records related to the student.
13.		<ul style="list-style-type: none"> To edit the Student ID, <ul style="list-style-type: none"> Click the Pencil icon at the left of the Identification field and change to edit mode. Click in the Student ID field. <ul style="list-style-type: none"> Enter the Correct ID. From the Toolbar at the top of the Demographic record, <ul style="list-style-type: none"> Click Save.

Step	Screen	Description
14.		<ul style="list-style-type: none"> Click the Red X Box on the student Demographics tab and close the record. Do the same to close the Duplicate Students report.
15.		<ul style="list-style-type: none"> Run the report again with the same settings. <ul style="list-style-type: none"> Click Generate.
16.		<ul style="list-style-type: none"> Confirm that the student no longer appears on the Duplicate Students report.
17.		<ul style="list-style-type: none"> Click the Red X Box on each tab and close all pages. You can also Close All Pages using the Pages button at the top right.