Steps to Merge Duplicate Student Records

Step	Screen	Description
1.	Records Reports Tools Help Students Demographics Classes In program years Programs Records Tests Certificates Employment History Places of Employment	 From the Menu bar at the top, Click Records. Select Students. Click Demographics. A tabbed page will open to the list of Demographics records for the current program year.
2.	View Organization Records Reports Tools Demographics > 4908 - Rolling Hills Adult School (RHAS) Aggregated + 4908 - Rolling Hills Adult School (RHAS) First • 4 4908 - Rolling Hills Adult School (RHAS) • • 01 - RHAS: North Campus • 01 - RHAS: South Campus Hilary 01 - RHA 02 - RHAS: South Campus Josh 01 - RHA 03 - RHAS: West Campus Jose 11 - RHA 05 - RHAS: West Campus Jose 11 - RHA 07 - RHAS: Central Library Jon 03 - RHA 11 - RHAS: North City Edwin	 Because duplicate records must be at the same site to merge – Click the Container field down-arrow and from the Toolbar at the top, Select a Site. Tip! Run the Duplicate Students report to identify duplicate records at the same site.
3.	Aggregated Subsites Filter Columns Sort 2 Last First Middle Gender Birth Name Gender Birth Columns Columns Gender Birth Date Columns Second, sort on Last Name. Second, sort on First Name. Second, sort on Middle Name. Note! Adding Gender and DOB columns helps identify duplicate records of the same student.	 Suggestion: Configure and presort columns: Click the UP arrow in the Last Name column header. Click and hold the Shift key on your keyboard, and then click the UP arrow in the First Name column header. Click and hold the Shift key again, and click the UP arrow in the Middle Name column header. Release the Shift key.

Student Records



Step	Screen	Description					
4.	TE View Organization Records Reports Tools Help Demographics:1	• For duplicate records,					
	New D2 - RHAS: South Campus V Aggregated Subsites Filter V Columns	1. Click to highlight the First record.					
	ID IName IN	 Use the Ctrl + click key command to select a Second record. 					
5.	Pages Edit Schema More View M scellaneous Merge Batch Insert Copy Child Lister	 With two duplicate records highlighted, Click the More button at the top right. Select Miscellaneous. Click Merge. Note! The Merge button is only available after selecting duplicate records. 					
6.	SEE IMAGE ON NEXT PAGE						
	The Merge Wizard opens in a new ta	b with a split screen					
	• On the right is the list of Entities to be merged .						
	 Identifies records with conflicting data fields. 						
	 On the left, it shows combined Demographics for the selected duplicate records. Data fields highlighted in pink identify conflicting information that must be solved. 						
	Note!						
	• Conflicting data fields in <i>all</i> Entities to be merged must be solved before you can begin the merge process.						

Student Records



ities to be merged	Set All To Record 1 Set	All To Record 2 Set	All To Newer Set All	o Older Mark All Fields Solve	d Reset All Mo
Student - 599661107	Student Informati	on			
Student in Program Year - 7/1/2017 -	Agency/Site: <u>4908 / 02 - R</u>	HAS: South Campus			
🖉 Program Enrollment - ESL/ELL	Student: 599661107 /	Luis R Perez	Birth Date: 5	/7/1983 Gender: Male	
Demographic History - 7/31/2015	Add Entry/Update Reco	rd			
	Identification				
	Student ID: Merged: 5 Record 1: Record 2: Solved 599661107	99661107 599661106 <u>599661107</u>			
	Title:	First Name: Luis		Middle Name: R R	lerged: R Last Name: ecord 1: Rodrigo ecord 2: R ved
	Gender: Male	Birth Date:	5/7/1983	IX.	
	SSN:	Does not have SSN	consent: Unsigned 💌	NEDP ID:	SSID
	GED 2002 ID: E	GED 2014	4 ID:	HISET ID:	TASC ID:
	Education				
	Highest Year of School: H	ighest Degree or Diplor	na:	CAHSEE Scores:	
	9	Merged: Technical/Certi	ficate	Date Score Pa	issed
	C	Record 2: Technical/Cert	ificate	Add Score	
		olved			
	C C C C C C C C C C C C C C C C C C C) HSE Certificate) High School Diploma) Technical/Certificate) Some college, no degre ighest Degree or Diplor	4 yr. College Gradua Higher than B.A./B.S Individual Education Other Diploma/Deg	te Plan ee Merged: True Record 1: False <u>Record 2: True</u>	
=		=	s	olved	
		=			
Toolbar at the top	of the Merge W	izard offers s utomatically uses a ecord.	shortcut optio	ns to merge the tw	o selected recor
Set All To Reco	rd 2 > A	utomatically uses t	the data from the sec	cond record.	
Set All To New		utomatically select	ts the data from the i	nost recent record.	
Set All To Older		elects data from th	e earliest record.	fault	
		A second the time of the	and character the state		

Student Records



Step	Screen	Description		
7.	 Identification Student ID: Record 1: 599661107 Record 2: 599661107 Souvea Souvea Identification Student ID: 599661107 	 For Student ID, Select the correct ID. Click Solved. <i>Note!</i> The Student ID field now displays the solved information. 		
8.	Middle Name: O Merged: R Record 1: Rodrigo Record 2: R Solved Rodrigo	 The recommendation for solving Middle Name fields is to Select the <u>full Middle Name</u> for unique identifying information about a student. Click Solved. 		
9.	Education Highest Year of School: Highest Degree or Diploma: 9 Merged: Technical/Certificate 9 Record 2: Technical/Certificate 9 Record 2: Technical/Certificate 9 Record 2: Technical/Certificate 9 None 0 A. A./A.S. Degree 0 HSE Certificate 9 Higher than B.A./B.S. 9 Technical/Certificate 1 High School Diploma 9 Higher than B.A./B.S. 9 Technical/Certificate 1 Individual Education Plan 0 Some college. no degree 0 Other Diploma/Degree Highest Degree or Diploma Earned Outside US: 1 False 1 Record 1: False 1 Record 2: True 1 Solved	 For data fields where no previous information exists (i.e., None), Select the added information. Click Solved. 		
10.	View Organization Record Demographics Merge Image: Comparison of the second of the seco	 A Check will display after solving an Entity area. Continue solving all data fields with conflicting information in each Entity area listed as you work your way down the Entity Tree. 		



