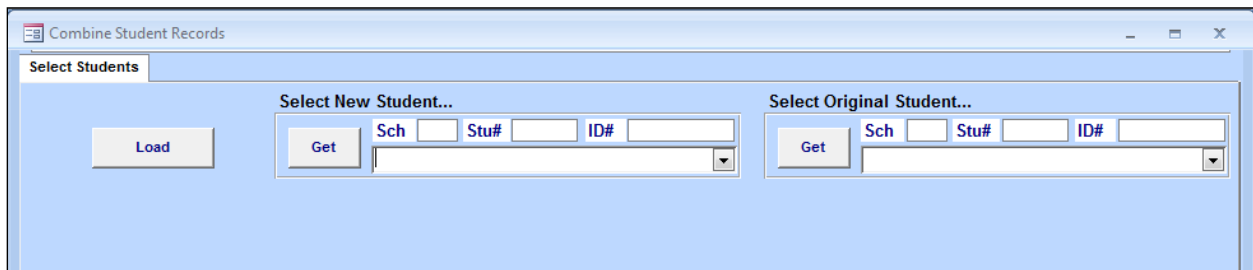


Combine Student Records November 20, 2017

The **Combine Student Records** form allows a user to combine the records of a student with either two SC/SN records or two Perm IDs. This form is only available in **AdminCS** or **District Client Aeries**.

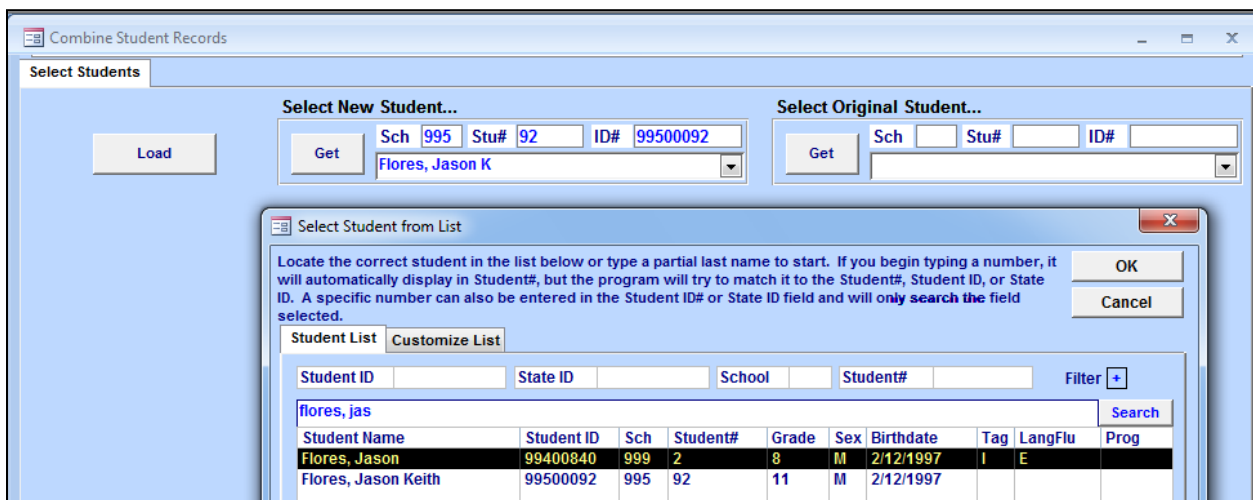
After logging into **AdminCS** or the **District Client Aeries** version, select **View All Forms** to open up a list of the available forms. Click the mouse on **Combine Student Records** and then click on **OK**.

The first step is to select the student records that you wish to combine. The **“Select New Student”** will be the student record whose Perm ID you wish to replace. Often times this will be the record with the most recent Perm ID and is the student’s currently active record. The **“Select Original Student”** will be the student record whose Perm ID you wish to keep and is the student’s record with their original Perm ID.



Use the **Get** button or the dropdown list on the **Select New Student** side to search for the student record whose Perm ID you wish to replace. Click on the record to select it.

Use the **Get** button or the dropdown list on the **Select Original Student** side to search for the student record whose Perm ID you wish to keep. Click on the record to select it.

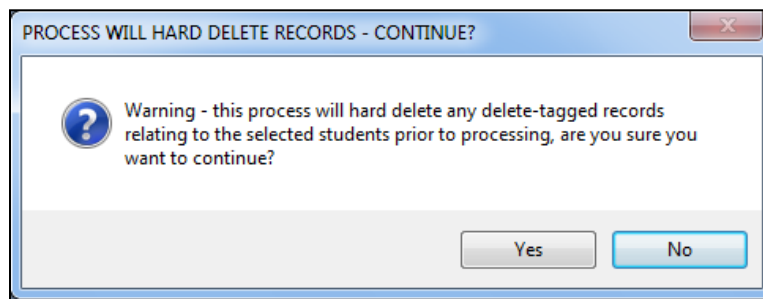


Locate the correct student in the list below or type a partial last name to start. If you begin typing a number, it will automatically display in Student#, but the program will try to match it to the Student#, Student ID, or State ID. A specific number can also be entered in the Student ID# or State ID field and will only search the field selected.

Student Name	Student ID	Sch	Student#	Grade	Sex	Birthdate	Tag	LangFlu	Prog
Flores, Jason	99400840	999	2	8	M	2/12/1997	I	E	
Flores, Jason Keith	99500092	995	92	11	M	2/12/1997			

In the below example, Jason Flores was enrolled for a couple of years with Perm ID 99400840. He left the district during his 8th grade year. A couple of years later he came back to the district and enrolled as a 10th grade student. At this point he was given a new Perm ID, 99500092. We are going to use the **Combine Student Records** form to update the Perm ID in his New Student record to the original number and merge the related records.

Click the mouse on the **Load** button to load the records. A message appears warning you that any delete-tagged records relating to the selected students will be permanently deleted. Select **Yes** to continue.



The system will scan the database for the related records associated with the two student records. Once complete, the screen will display which Perm ID it is keeping (by default it will keep the Original Perm ID), the **IDN** records for the two Perm IDs, and the **STU** fields that contain different data between the two records. The **IDN Records** area is read-only, no adjustments are made to **IDN** on this screen. The Stu Records portion of the screen allows you to select which field values you wish to keep.

In the below example, the newer student record did not have any Birth City, Birth State, or Birth Country data, so I have selected to merge the data from the **Original Student Record** for these fields into the **New Student Record**.

Field Name	Seq	Field Value	Field Value	
ID	ID Number	1	99500092	99400840
LN	Last Name	2	Flores	Flores
FN	First Name	3	Jason	Jason
MN	Middle Name	4	Keith	
SF	Suffix	5		
BD	Birthdate	6	2/12/1997	2/12/1997
SX	Sex	7	M	M

Field Name	Seq	Field Value	Keep?	Field Value
SM	SM	29	0	8
DM	DM	30	0	9
PED	Parent Ed Lvl	31	0	14
VDT	NM/AD Verif Date	32	0	9/10/2009
VBD	BD Verif	33	0	1
BCY	Birth City	34	0	West Covina
BST	Birth State	35	0	CA
BCU	Birth Country	36	0	US
CL	CorrLng	37	01	00
DD	DstEnterDt	38	8/29/2012	9/1/2009

STU Related

Next click the mouse on the **STU Related** tab. Review the table(s) in the drop-down. By default the data from the **New Student** record will be selected to be kept. Select any field values from the **Original Student** record that you would like to merge into the **New Student** record.

Combine Student Records - SUP

Select Students | **STU Related** | IDN Related | Confirm and Process

Select Table to View... **SUP** Note: only records for the first student selected will remain for any table not selected.

Original Tbl Table Name SN1 Cnt SN2 Cnt view ALL tables carefully!

Field Name	SUP	Supplemental	1	1	Keep?	Field Value
SC	School	1	995		<input type="radio"/>	999
SN	Student#	2	92		<input type="radio"/>	2
PI	PI	3	A		<input type="radio"/>	
HS	HS	4			<input type="radio"/>	1

NOTE: The **SC** and **SN** fields are displayed for reference only. They cannot be changed.

IDN Related

Review each of the tables in the **Select Table to View** dropdown. Select or de-select records and fields as appropriate.

Combine Student Records - ENR

Select Students | **IDN Related** | STU Related | Confirm and Process

Select Table to View... **ENR** Note: only records for the first student selected will remain for any table not selected.

Keep?	Perm ID#	YR	Tbl	Table Name	ID1 Cnt	ID2 Cnt
<input type="checkbox"/>			AHD	Attendance Hist Details	7	0
<input type="checkbox"/>			AHS	Attendance Hist Summa	1	0
<input checked="" type="checkbox"/>	99400840	2009	CON	Contacts	2	0
<input checked="" type="checkbox"/>	99400840	2010				
<input checked="" type="checkbox"/>	99500092	2012	ENR	Enrollment	2	2
<input checked="" type="checkbox"/>	99500092	2013	HIS	Course History	4	0
			LAC	Language Assessment	0	1
			PIC	Student Pictures	0	1

By default the one-to-many tables, such as **CON**, **ENR**, **HIS** and **TST** will have all records selected to be kept. If there are any records that you do not want (for example, the old Contact records or duplicate Test records) then click on the checkbox to remove the checkmark.

Combine Student Records - CON

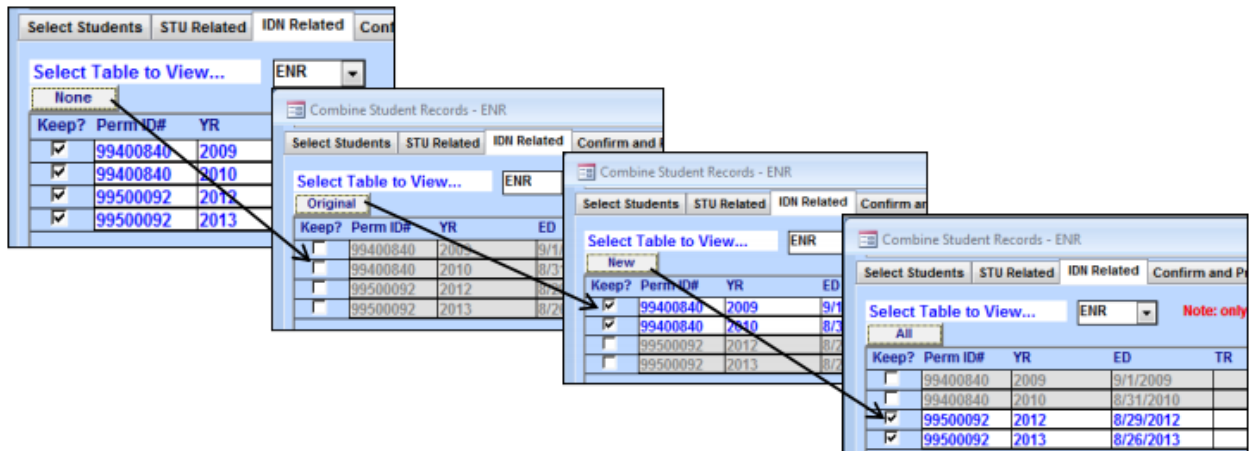
Select Students | **IDN Related** | STU Related | Confirm and Process

Select Table to View... **CON** Note: only records for the first student selected will remain for any table not selected.
Please review ALL tables carefully!

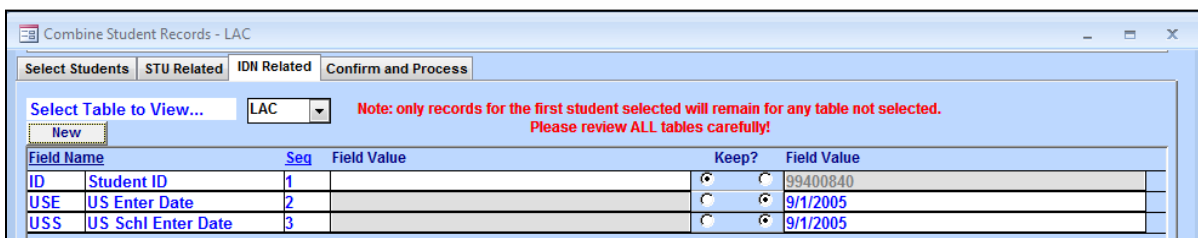
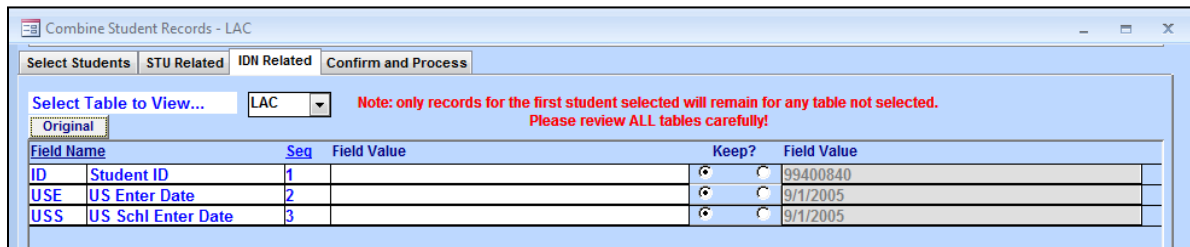
Keep?	Perm ID#	NM	AD	CY	ST	ZC	TL	ME	CD	SQ
<input checked="" type="checkbox"/>	99500092	Becky Celest		Eagle Point	CA	99998	7775551803			1
<input type="checkbox"/>	99500092	Carol Celesti		Eagle Point	CA	99998	7775551076			2

NOTE: The **ID** field displays for reference only.

The **None** button can also be used to quickly de-select all records. Clicking on this box will toggle the selection options between **None**, **Original**, **New** and **All**.



The one-to-one tables, such as **IMM** or **LAC**, will have the data for the **New Student Record** selected to be kept by default. Review the information and select the field values that you wish to keep. The **Original** button will select all of the fields from the **Original Student** record. Clicking on this button will toggle the selection options between **Original** and **New**.



NOTE: The **ID** field displays for reference only. It cannot be changed.

Confirm and Process

Once all of the tables have been reviewed and all selections have been made, click on the **Confirm and Process** tab.

The **Selected New Student** lists the SC/SN STU record that will be kept along with the Perm ID that it will have. In the example below the **New Student** record SC 995, SN 92 will have the Original Perm ID of 99400840.

A summary of the records/fields affected is displayed under each record.

Selecting the option to **Delete-tag IDN and ID-based records NOT Merged from Perm ID# 0099500092**, will delete-tag the IDN record for 99500092 and any records not selected to keep. Typically this option will be selected.

Selected New Student...				Keep ID...		Selected Original Student...				Drop ID...	
Sch	Stu#	STU Name	ID#	Sch	Stu#	STU Name	ID#	Sch	Stu#	STU Name	ID#
995	92	Flores, Jason K	99400840	999	2	Flores, Jason	99500092				

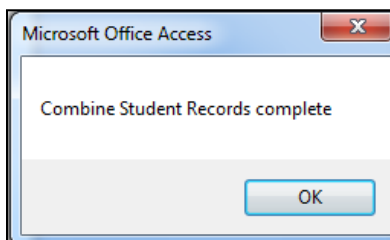
Keep/Move to New Student...			Drop/Leave with Original...		
STU	Student Data	38 Fields	STU	Student Data	3 Fields
AHD	Attendance Hist Details	7 Records	CON	Contacts	1 Record
AHS	Attendance Hist Summary	1 Record	ENR	Enrollment	2 Records
CON	Contacts	1 Record	LAC	Language Assessment	2 Fields
ENR	Enrollment	2 Records			
HIS	Course History	4 Records			
LAC	Language Assessment	1 Field			
PIC	Student Pictures	1 Record			
SUP	Supplemental	4 Fields			

Delete-tag IDN and ID-based records NOT Merged from Perm ID# 0099500092

Run

Exit

Select the **Run** button to combine the students. A prompt will come up asking if you wish to combine the two students. Select **Yes** to continue with the process. A message will display on the screen when the process has completed. Select **OK** to exit the form.



The **Combine Student Records** process updated the **New Student Data** record with the Original Perm ID and the Original fields that were selected.

The screenshot shows the 'Students' application window for the 2013-2014 school year at Aeries Continuation School. The student record for Jason Flores (Stu# 000092) is displayed. The 'Perm ID No.' is 099400840. The 'Parent/Guardian' information shows M/M F Flores with area/telephone (777) 555-1561 and primary contact (777) 555-0330. There are also fields for Primary Contact 2 and Name/Addr Ver Verified Status.

This screenshot shows the same student record for Jason Flores, but with additional fields populated. The 'Last Name Alias', 'First Name Alias', and 'Middle Name Alias' are all empty. The 'Student Email Address' is Jason.Flores@example.com. The 'State Student ID' is 0099400840, 'Social Security' is empty, 'Birth City' is West Covina, 'State' is CA, and 'Country' is US. The 'Network Login ID' and 'Verif Pass Code' fields are also present.

The Perm ID that was replaced is copied into the **Old Perm ID (STU.OID)** field for reference.

This screenshot shows a close-up of the 'Students' application window. The 'Old Perm ID' field is highlighted, showing the value 099500092, which is the original Perm ID that was replaced. Other fields like 'LastSchl' and 'Old Stu#' are also visible.

And the related tables were updated with the records/fields that were selected.

The screenshot shows the 'Enrollment History' application window. It displays a table of enrollment records for Jason Flores (Stu# 92) at Aeries Continuation School. The table includes columns for SchL-Year, School Name, Stu#, Trk, Prg, AP1, AP2, Grd, Teacher, Enter Date, Leave Date, Exit Rsn, Next Sch, Rptg Sch, IntDst Trans, and NPS Spec Ed.

Schl-Year	School Name	Stu#	Trk	Prg	AP1	AP2	Grd	Teacher	Enter Date	Leave Date	Exit Rsn	Next Sch	Rptg Sch	IntDst Trans	NPS Spec Ed
2013-2014	995 Aeries Continuation School	000092					11	0 Unassigned	8/26/2013			0	0		
2012-2013	995 Aeries Continuation School	000092					10	0 Unassigned	8/29/2012	9/24/2012	160	0	0		
2010-2011	993 Bald Eagle Intermediate School	000840					8	0 Unassigned	8/31/2010	6/13/2011	160	0	0		
2009-2010	993 Bald Eagle Intermediate School	000840					7	0 Unassigned	9/01/2009			0	0		

NOTE: The **Parent Portal Account** tables (**PWA** and **PWS**) are not updated at this time. They will need to be updated manually. The **Testing Pass Status (TPS)** table is also not updated in the Combine Student Data process, but will be updated during normal Aeries usage.