

Combine Person Wizard

Last Modified on 01/13/2025 2:38 pm CST

Tool Search: Combine Person

The Combine Person tool allows administrators to search for and combine two people (and their corresponding records) within Campus. When selecting two people to be merged, existing data for both people is presented to the user and Pre and Post Audit Reports are provided as a way to audit a subset of each user's information before and after a merge occurs.

When merging two people, duplicate information is deleted, similar data is merged and unique data is kept.

This article includes the following topics:

- [Tool Rights](#)
- [Combine Person Logic](#)
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- [Understand the Combine Person Tool](#)
 - [Search for Two People to Merge](#)
 - [Collect Duplicate Person Data](#)
 - [Previewing Merge Data](#)
 - [Merge Two People](#)
 - [Reviewing Post-Merge Data](#)
- [Modules and Fields Shown for Duplicate Record Analysis](#)
- [SIF Logic Tied to the Combine Person Tool](#)

Users are highly encouraged to use the [Duplicate Student Search Report](#) and [Duplicate IDs Report](#) to identify potential duplicate students before using the Combine Person tool.

Customers who have purchased Campus Finance, Human Resources, or Payroll as add-on functionality should not use the Combine Person tool for combining staff members.

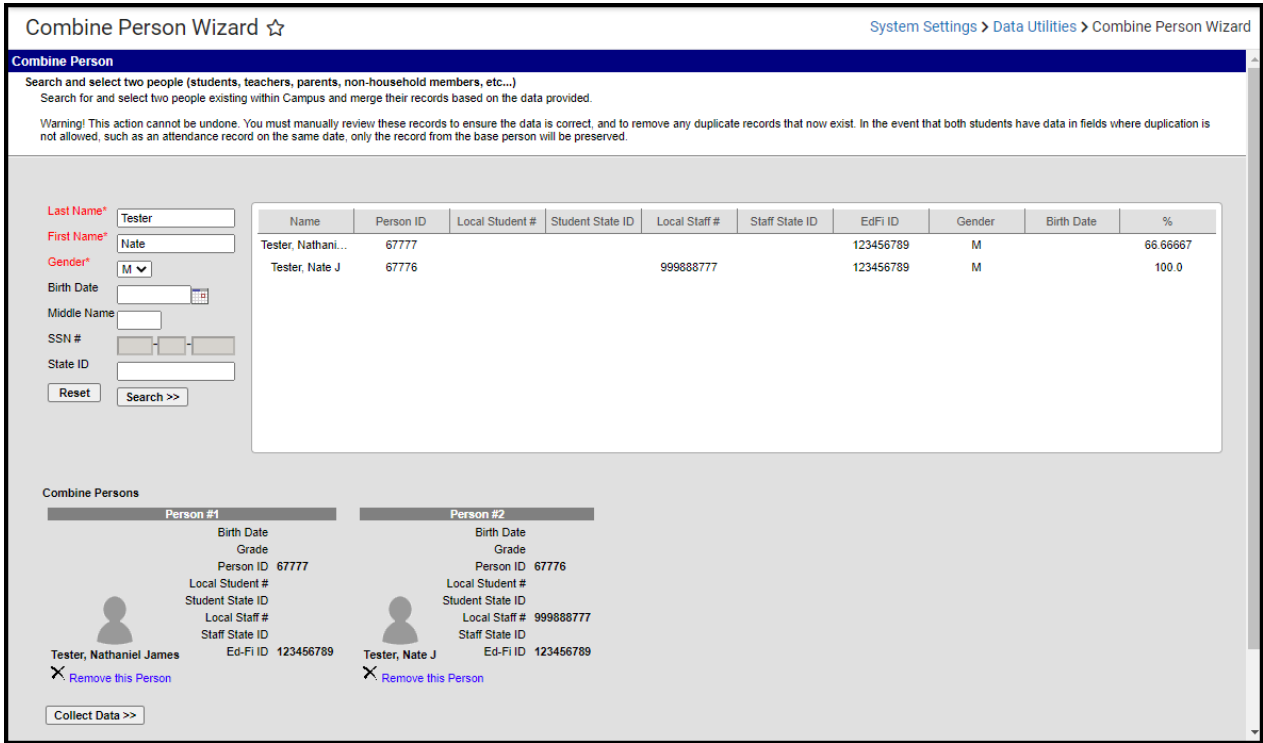


Image 1: Combine Person Tool

Tool Rights

Location: User Management > User Account Information > User Account > Individual Tool Rights

In order to use the Combine Person tool a user must have at least **R**(ead) tool rights for the tool (Image 2). Combine Person tool rights cannot not be added to a user group.

When running the Combine Person tool in a District Edition linked to a State Edition of Campus, the person initiating the merge **MUST** exist at the state level, and their records must be synced from district to state. Because a person merge is automatically performed at the state level once merged at the district level, failure to exist at the state level will result in records not properly merging.

Due to the sensitive information displayed within the tool (i.e., Social Security Numbers, birth dates, etc), users are highly encouraged to limit the number of users with tool rights to the Combine Person tool. Tool Rights for the Combine Person tool exists for SIS users only.

User Tool Rights Editor					
▼ System Settings	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
▶ Custom Data and Links	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
▶ Data Change Tracker	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
▶ Data Defining Tools	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
▶ Data Interchange Setup	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
▶ Data Interchange Administration	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
▼ Data Utilities	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Ad Hoc Deactivated Elements Impact Report	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Ad Hoc Element Replacement Wizard	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Combine Person Wizard	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
Data Access Tracker Report	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Data Extract History	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete

Image 2: Combine Person Tool Rights

Once tool rights are given to a user, the user must log out and back into Campus to access the Combine Person tool (and any other tool rights applied during this time).

Combine Person Logic

- The Combine Person tool uses three different processes: Merge, Update, and Delete.
 - Merge logic will compare two similar records and merge data into one record.
 - Update logic will update the Drop Person's record with the Keep Person's personID.
 - Delete logic will delete the Drop Person's record when it's determined that two records are duplicates.
- Identity records are never merged but instead are added as historical records on the kept person's Identities tab.
- In order for users to be properly merged at the state, the person who initiates the merge at the district level **MUST** exist as a person that is State-Linked (at the state level and their data has been synced to the state edition) in order for state level records to merge correctly.
- When using this tool in State Edition for two people who have the same State ID, same last name, same first name, but different person IDs, these two people display as two different person records based off of the associated person ID.
- When using this tool in a State Edition for two people who have the same Staff State ID, same last name, same first name, but different person IDs, these two people display as two different person records based off their associated person ID.
- For environments using Ed-Fi functionality: When two people are merged, all data for the deleted person is removed from Ed-Fi and a resync is performed to update Ed-Fi data for the remaining person.
- User accounts are moved to the kept person.

Manually Cleaning up Duplicate Data Prior to Merging

When merging two people, records that appear identical (based on the fields used to identify duplicate records for the module) will result in one duplicate record being deleted. If both records should be kept and merged to the base person (the person existing after the merge), users will need to manually modify one of the records so that they are no longer identical.

When two identical records are identified and the record to be deleted contains different information than the record being kept (such as state-specific data not used in matching duplicate records), users are highly encouraged to review both records and reconcile field value differences on the record being kept prior to merging.

For example, in the image below (Image 3), the record being deleted contains different state-specific field values than the record being kept. Users should review these values to ensure the record being kept is accurate.

Use the Duplicate Student Search Report and Duplicate IDs Report to help identify duplicate students.

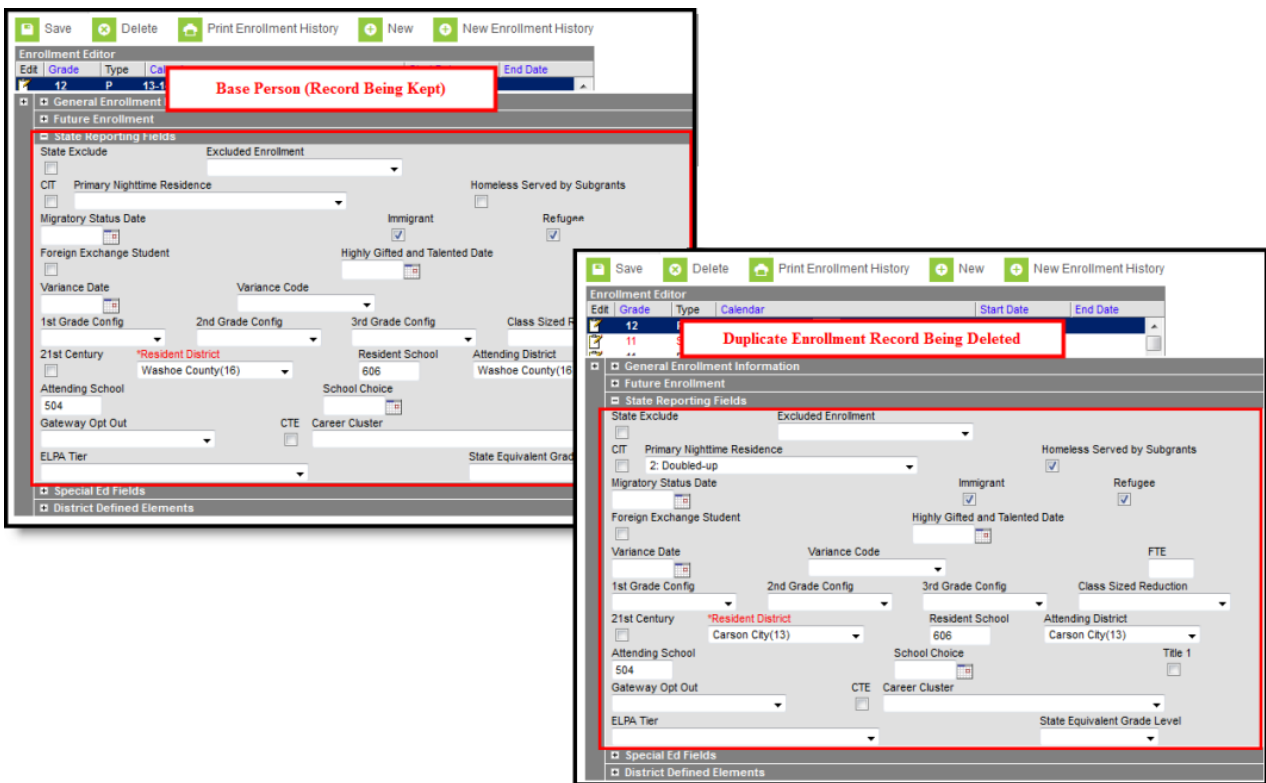


Image 3: Field Value Differences Between Two Enrollment Records

Understand the Combine Person Tool

Properly using the Combine Person tool means understanding which people are duplicates, which data will be merged, deleted, or kept once two people are merged and what data must be manually

cleaned up to ensure records are merged appropriately.

Merging two people means not only are personID fields updated to the kept person, but also Modified By, Referred By and other identifier fields throughout Infinite Campus.

The following topics describe each step of the Combine Person process.

- [Search for Two People to Merge](#)
- [Collect Duplicate Person Data](#)
- [Previewing Merge Data](#)
- [Merge Two People](#)
- [Reviewing Post-Merge Data](#)

Users with HR/Finance/Payroll functionality enabled should not use the Combine Person tool for combining staff members.

Users are highly advised not to use the Combine Person tool while logged in as a generic Administrator account. If more than one person in a district is an administrator, users will not be able to identify exactly who performed what merges and data changes.

The transactions that combine or delete people can block data input on affected tables for the duration of the transaction. When run during busy times in the school day this can cause significant blocking and noticeable slowdowns or make the app appear to hang. Users are advised to use this tool during non-peak hours.

Search for Two People to Merge

The first step in combining two duplicate people is properly searching for and identifying them via person identifiers (i.e., Person ID, Local Staff #, Student State ID, etc).

Use the Duplicate Student Search Report for help in identifying duplicate students.

Combine Person

Search and select two people (students, teachers, parents, non-household members, etc...)
 Search for and select two people existing within Campus and merge their records based on the data provided.

Warning! This action cannot be undone. You must manually review these records to ensure the data is correct, and to remove any duplicate records that now exist. In the event that both students have data in fields where duplication is not allowed, such as an attendance record on the same date, only the record from the base person will be preserved.

Last Name*
 First Name*
 Gender*
 Birth Date
 Middle Name
 SSN #
 State ID

Name	Person ID	Local Student #	Student State ID	Local Staff #	Staff State ID	EdFi ID	Gender	Birth Date	%
Tester, Nathani...	67777					123456789	M		66.66667
Tester, Nate J	67776			999888777		123456789	M		100.0

Combine Persons

Person #1	Person #2
Birth Date Grade Person ID 67777 Local Student # Student State ID Local Staff # Staff State ID Ed-Fi ID 123456789 Tester, Nathaniel James <input type="button" value="Remove this Person"/>	

Image 4: Searching for the First Duplicate Person

To search for and add a person for merging:

1. Enter at least the person's **Last Name, First Name** and **Gender**.
2. Select the **Search** button. People matching the search criteria entered will appear in the window on the right.

Note: EdFi ID data will only appear for users whose district is utilizing EdFi functionality.

Search results are based on people whose name is exactly, similarly spelled or sounds like the name entered in search criteria. The % column will indicate how close of a match each person's name is to search criteria entered.

3. Select the first duplicate person from the search results window. The person (and identifier data) will appear in the Person #1 column of the Combine Persons section (Image 4).
4. Now that the first duplicate person has been selected, the second duplicate person must be identified and selected (Image 5). Select the second duplicate person, making the person appear under the Person #2 column of the Combine Persons section (Image 5).

Combine Person
 Search and select two people (students, teachers, parents, non-household members, etc...)
 Search for and select two people existing within Campus and merge their records based on the data provided.

Warning! This action cannot be undone. You must manually review these records to ensure the data is correct, and to remove any duplicate records that now exist. In the event that both students have data in fields where duplication is not allowed, such as an attendance record on the same date, only the record from the base person will be preserved.

Last Name*
 First Name*
 Gender*
 Birth Date
 Middle Name
 SSN #
 State ID

Name	Person ID	Local Student #	Student State ID	Local Staff #	Staff State ID	EdFi ID	Gender	Birth Date	%
Tester, Nathani...	67777					123456789	M		66.66667
Tester, Nate J	67776			999888777		123456789	M		100.0

Combine Persons

Person #1	Person #2
Birth Date Grade Person ID 67777 Local Student # Student State ID Local Staff # Staff State ID Ed-Fi ID 123456789 Tester, Nathaniel James <input type="button" value="Remove this Person"/>	Birth Date Grade Person ID 67776 Local Student # Student State ID Local Staff # 999888777 Staff State ID Ed-Fi ID 123456789 Tester, Nate J <input type="button" value="Remove this Person"/>

Image 5: Searching for the Second Duplicate Person

Collect Duplicate Person Data

Now that two duplicate people have been identified and selected, duplicate record data must be collected. Collecting data allows users to view duplicate records and determine which records should be kept during the person merge.

Combine Person
 Search and select two people (students, teachers, parents, non-household members, etc...)
 Search for and select two people existing within Campus and merge their records based on the data provided.

Warning! This action cannot be undone. You must manually review these records to ensure the data is correct, and to remove any duplicate records that now exist. In the event that both students have data in fields where duplication is not allowed, such as an attendance record on the same date, only the record from the base person will be preserved.

Last Name*
 First Name*
 Gender*
 Birth Date
 Middle Name
 SSN #
 State ID

Name	Person ID	Local Student #	Student State ID	Local Staff #	Staff State ID	EdFi ID	Gender	Birth Date	%
Tester, Nathani...	67777					123456789	M		66.66667
Tester, Nate J	67776			999888777		123456789	M		100.0

Combine Persons

Person #1	Person #2
Birth Date Grade Person ID 67777 Local Student # Student State ID Local Staff # Staff State ID Ed-Fi ID 123456789 Tester, Nathaniel James <input type="button" value="Remove this Person"/>	Birth Date Grade Person ID 67776 Local Student # Student State ID Local Staff # 999888777 Staff State ID Ed-Fi ID 123456789 Tester, Nate J <input type="button" value="Remove this Person"/>

Image 6: Collecting Record Data

To collect data, click the **Collect Data** button (Image 6). Data for specific modules will appear for each person (Image 7).

This is not a comprehensive list of all records/data that will be merged.

Combine Person

Search and select two people (students, teachers, parents, non-household members, etc...)
 Search for and select two people existing within Campus and merge their records based on the data provided.

Warning! This action cannot be undone. You must manually review these records to ensure the data is correct, and to remove any duplicate records that not allowed, such as an attendance record on the same date, only the record from the base person will be preserved.

Combine Persons

Base	Person	Name	Birth Date	Grade	Person ID	Local Student #	Student State ID	Local Staff #	Staff State ID	Ed-Fi ID
<input type="radio"/>	#1	Tester, Nathaniel James			67777					123456789
<input type="radio"/>	#2	Tester, Nate J			67776			999888777		123456789

(The base person is the person who will be kept after merging.)

Module	Person #1	Person #2
Identity	<input type="checkbox"/> Tester, Nathaniel James Suffix Gender <i>M</i> Birth Date SSN	<input type="checkbox"/> Tester, Nate J Suffix Gender <i>M</i> Birth Date SSN
NASIS		

Image 7: Duplicate Person Record Information

Once data is collected, record information will appear for each person (Image 7). Select (+) to expand each section for information about record field values. For example, in Image 8, each duplicate person's enrollment record data is shown.

Module	Person #1	Person #2
Identity	<input type="checkbox"/> Tester, Iate Suffix Gender <i>M</i> Birth Date 06/19/1985 SSN 123456789	<input type="checkbox"/> Teste, Iate Suffix Gender <i>M</i> Birth Date 06/19/1985 SSN 123456789
Enrollment	<input type="checkbox"/> 2012-13 Robbinsdale Armstrong District ROBBINSDALE Calendar Name 2012-13 Robbinsdale Armstrong Schedule Structure Main Service Type P Start Date 09/07/2012 End Date Grade 12	<input type="checkbox"/> 2012-13 Robbinsdale Armstrong District ROBBINSDALE Calendar Name 2012-13 Robbinsdale Armstrong Schedule Structure Main Service Type P Start Date 09/07/2012 End Date Grade 12
Enrollment History		

Image 8: Expanded View of Record Information

Previewing Merge Data

To preview merge data, select the base person (the person who will remain after the merge, highlighted in yellow) and select the **Preview Merge** button (Image 9).

End-dated households will only show start and end dates (no household name).

Once duplicate record data has been reviewed, select the base person (the person who will remain after the merge, highlighted in yellow) and click the **Preview Merge** button (Image 9).

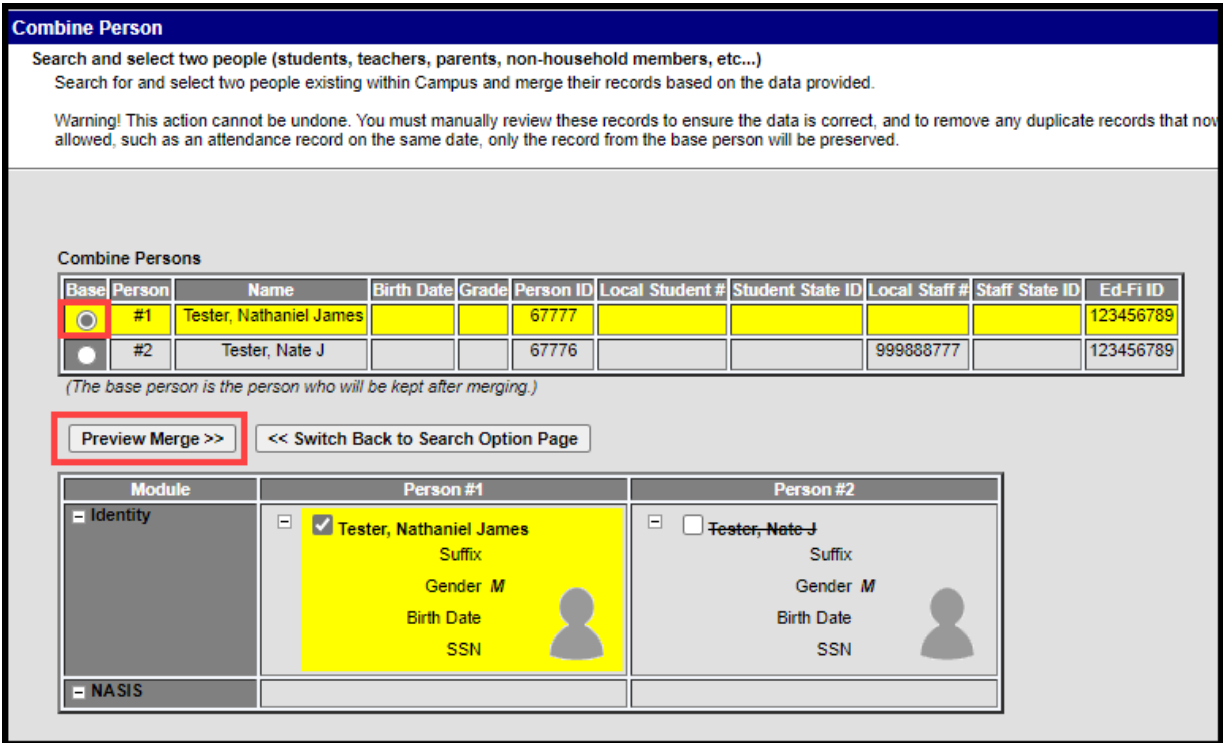


Image 9: Selecting a Base Person and Preview Merge Button

Duplicate data will appear with a strike through it. Records which will remain after the merge will have their corresponding checkbox marked and data will be highlighted in yellow (Image 10).

To change which record(s) should be kept, select the record's corresponding checkbox. The new record will highlight in yellow and duplicate records will appear crossed out.

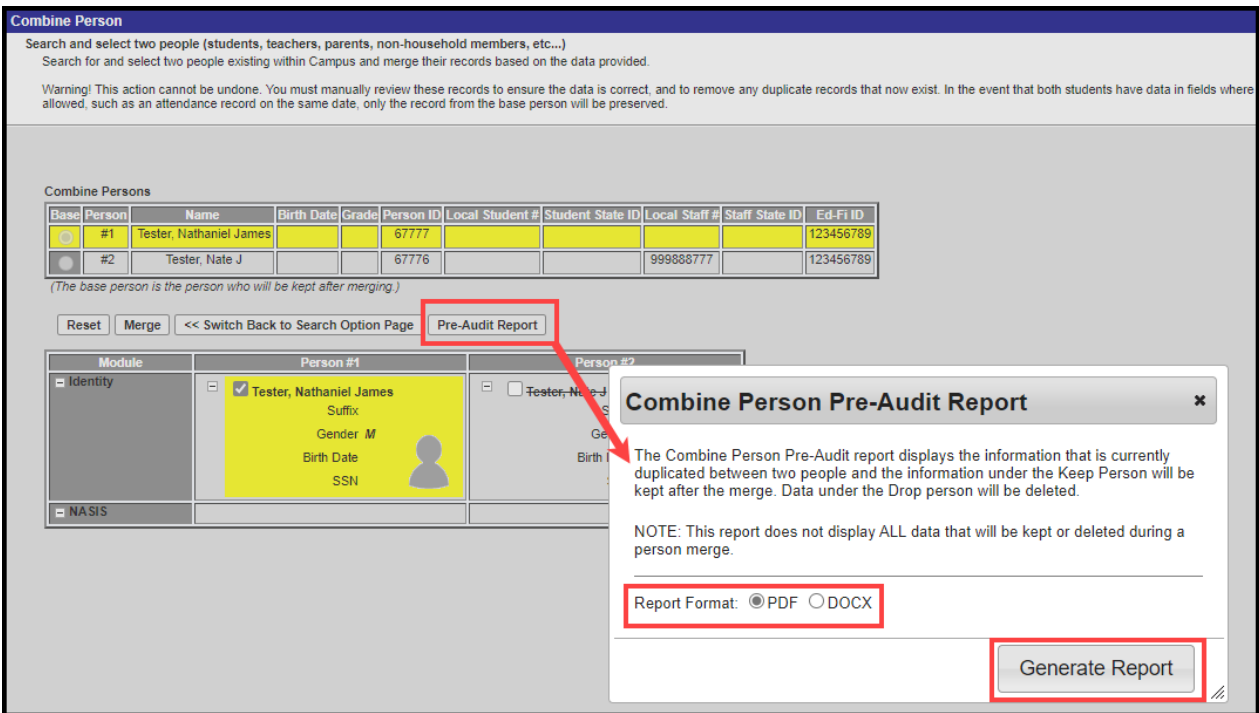


Image 10: Reviewing Merge Data

To view duplicate record data in report format, click the **Pre-Audit Report** button, select a **Report Format**, and select **Generate Report** (Image 10). The Combine Person Pre-Audit Report will appear in a separate window in the designated format (Image 11).

This report does not display all data that will be kept or deleted during a person merge. Any data listed under the drop person which should be kept must be manually modified within Campus prior to merge in order for the record to no longer appear as a duplicate.

Combine Person Pre-Audit

11/01/2022 : 01:52:38 PM

The Combine Person Pre-Audit report displays the information that is currently duplicated between two people and the information under the Keep Person will be kept after the merge. Data under the Drop person will be deleted.

NOTE: This report does not display ALL data that will be kept or deleted during a person merge.

If any data listed under Drop Person must be kept user must manually modify that data within the application. The fields on the report are the fields that we are comparing to determine if two records are duplicate.

	Keep Person	Drop Person
	Tester, Nathaniel James	Tester, Nate J
	Suffix	Suffix
	Gender M	Gender M
	Birth Date	Birth Date
	SSN	SSN
	Person ID 67777	Person ID 67776
	Local Student #	Local Student #
	Student State ID	Student State ID
	Local Staff #	Local Staff # 999888777
	Staff State ID	Staff State ID
	Ed-Fi ID 123456789	Ed-Fi ID 123456789
Module	Keep Person's Data	Drop Person's Data
Enrollment		
Enrollment BIE		
Academic Program		
Graduation		
Relationship		
Employment		
NASIS		
POS Eligibility		
User Defined Data		
Locker Assignment		
Transportation		

Image 11: Combine Person Pre-Audit Report

Merge Two People

Once data has been reviewed and all appropriate records have been selected, select the **Merge** button (Image 12). A warning message will appear, detailing data to be merged and requiring confirmation of the merge (Image 13).

Select the **Agree to Merge** button to initiate merge of the two people. Select **Cancel** to cancel merging of the two people (no data will be changed).

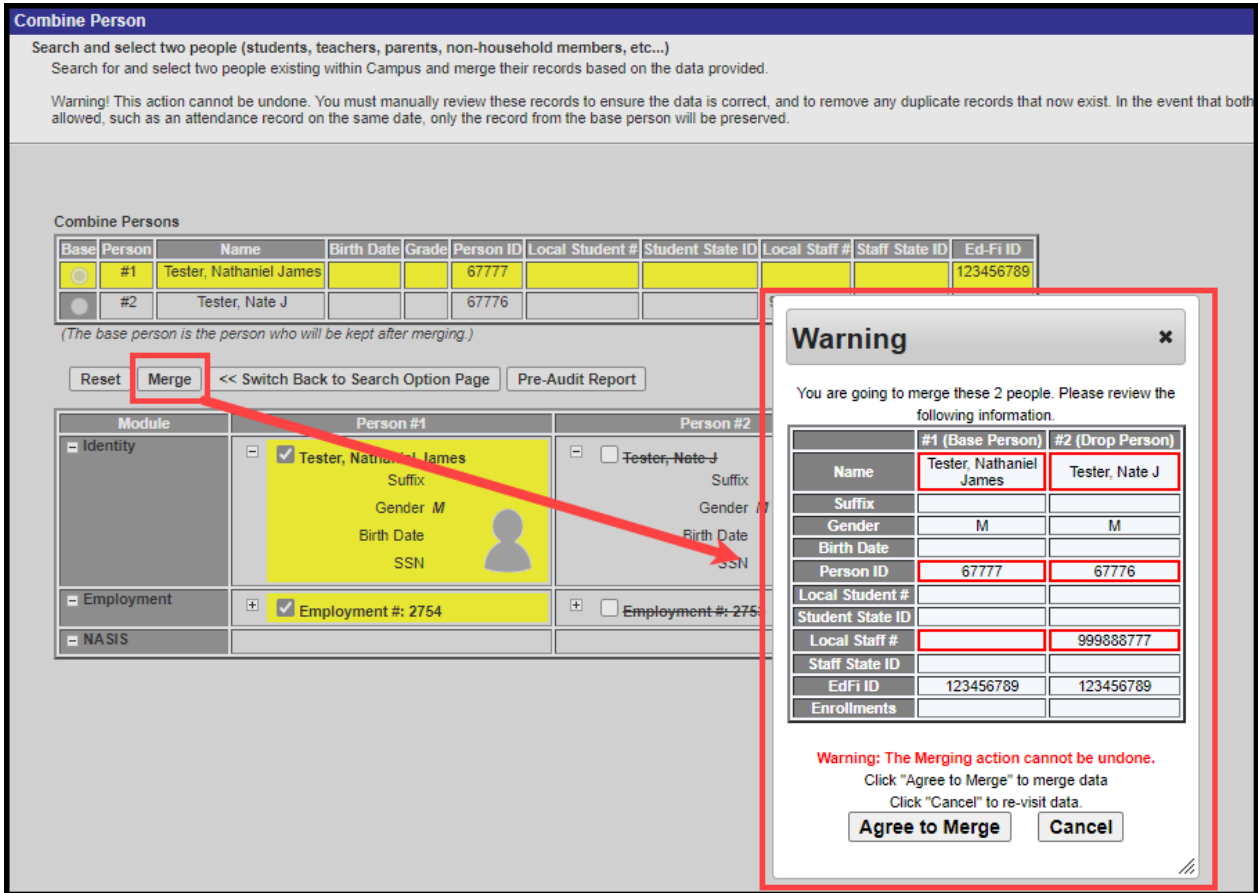


Image 12: Initiating Merge

Once **Agree to Merge** is selected, the following will occur based on whether or not you are within a District Edition linked to a State Edition of Campus:

If connected to a State Edition of Campus : Once a merge is initiated at the district level, the same merge is initiated at the state level to ensure records match. The user who initiates the merge at the district level **MUST** exist as a person that is State Linked (at the state level and their data has been synced to the state edition) in order for state level records to merge correctly.

Once the merge is complete, a [Process Alerts](#) message will appear at both the state and district level for the user indicating whether or not the merge was successful at the state level (see Image 14).

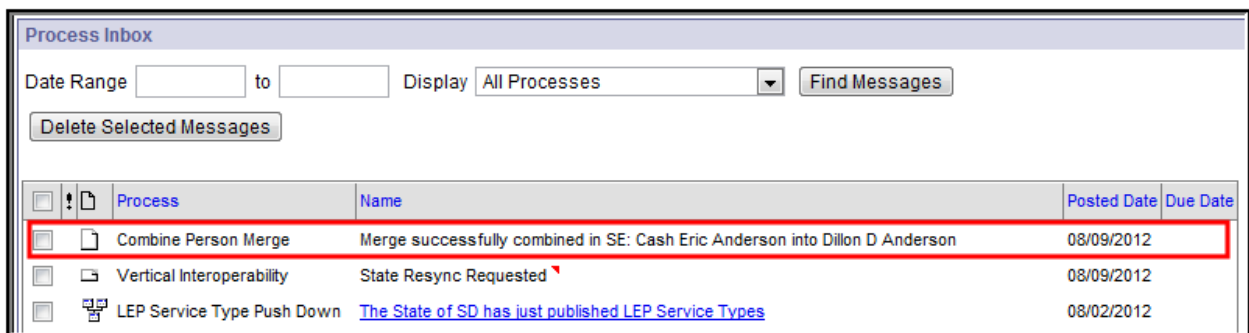


Image 13: Process Inbox Message Confirming Successful State Merge

If NOT connected to a State Edition of Campus: The loading screen will appear and continue to spin until the merge is complete.

IF THE MERGE FAILS: If the merge fails a message will appear with a short description of what caused the failure. If you do not understand the reason for the merge failure, please contact Infinite Campus Support.

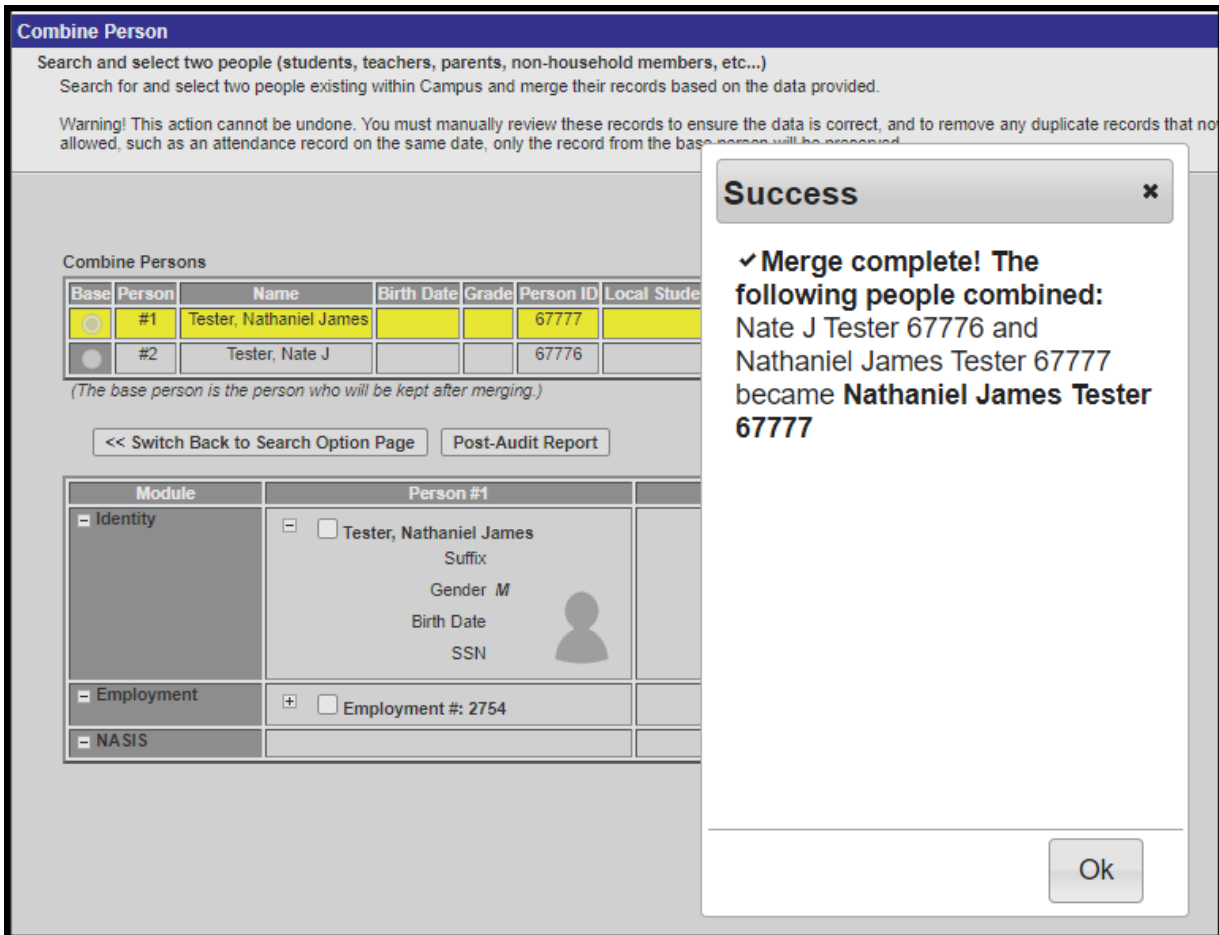


Image 15: Confirmation of a Successful Merge

Once the merge is complete, a popup message will appear indicating a successful merge (Image 15).

Reviewing Post-Merge Data

Once two people have been merged, users can then run the Post Audit Report to validate data now linked to the person that was kept.

Combine Persons

Base	Person	Name	Birth Date	Grade	Person ID	Local Student #	Student State ID	Local Staff #	Staff State ID
<input checked="" type="radio"/>	#1	Tester, Nate	01/28/2008	11	49513	15450001			
<input type="radio"/>	#2	Teste, Nate	01/28/2008	09	49786	15453621	634781		

(The base person is the person who will be kept after merging.)

Module	Person #1	Person #2
Identity	<input type="checkbox"/> Tester, Nate Suffix Gender <i>M</i> Birth Date <i>01/28/2008</i> SSN	
Enrollment	<input type="checkbox"/> 24-25 Harrison High <input type="checkbox"/> 23-24 Harrison High <input type="checkbox"/> 22-23 Harrison High <input type="checkbox"/> 21-22 Fillmore Middle School <input type="checkbox"/> 20-21 Fillmore Middle School	
Enrollment History		
Academic Program	<input type="checkbox"/> Program: HS Graduation	
Graduation	<input type="checkbox"/> Graduation	
POS Account	<input type="checkbox"/> Account #: 5633	
Household	<input type="checkbox"/> Household: Sawyer	
Relationship	<input type="checkbox"/> Relationship: Father <input type="checkbox"/> Relationship: Mother <input type="checkbox"/> Relationship: Sibling <input type="checkbox"/> Relationship: Sibling	
IASIS		
POS Identification	<input type="checkbox"/> Identification: 11671	
Fee	<input type="checkbox"/> Fee: 9th Grade Retreat	

Image 16: Generating the Post Audit Report

To generate the Post Audit Report, click the **Post Audit Report** button (Image 15). The report will appear in a separate window in PDF format (Image 17).

This is not a comprehensive list of ALL data changes which occurred when the two people were merged.

Combine Person Post-Audit		
11/01/2022 : 01:54:59 PM		
	Keep Person	
	Tester, Nathaniel James	
	Suffix	
	Gender M	
	Birth Date	
	SSN	
	Person ID 67777	
	Local Student #	
	Student State ID	
	Local Staff # 999888777	
	Staff State ID	
	Ed-Fi ID 123456789	
Module	Keep Person's Data	Drop Person's Data
Enrollment		
Enrollment BIE		
Academic Program		
Graduation	Graduation	
	District Name	
	Date First Entered the 9th Grade	
	NCLB Cohort End Year	
	NGA Cohort End Year	
Household		
Relationship		
Employment	Employment #: 2754	
	District Name Trumbull	
	Start Date 09/02/2022	
	End Date	
NASIS		
POS Eligibility		
User Defined Data		
Locker Assignment		
Transportation		

Image 17: Post Audit Report

The Post Audit Report displays a summary of information kept and merged into the keep person's records. Depending on which records were selected to keep on the Combine Person editor (indicated by selecting the checkbox and having the data highlighted), kept information can appear under the Drop Person's Data column indicating which records from the drop person were kept and merged into the keep person.

Modules and Fields Shown for Duplicate Record Analysis

The following table describes all potential fields displayed within the Combine Person tool and in the Post and Pre Audit Reports.

This is NOT a comprehensive list of ALL fields looked at and/or affected by a person merge within the Combine Person tool. This list describes all fields which will display within the Combine Person tool for describing duplicate record information.

All user accounts are moved from the dropped person to the kept person.

The **Action** column indicates the action occurring during a person merge.

- "Merge" means the dropped person's records are merged with the kept person's records.
- "Combine" means the dropped person's records are combined into the kept person's records.

Table	Field(s)	Action
Employment	<ul style="list-style-type: none"> • Start Date • End Date 	Merge
Enrollment	<ul style="list-style-type: none"> • Start Date • End Date • Grade • District • Calendar • Schedule Structure • Service Type 	Merge
Fee Assignment	<ul style="list-style-type: none"> • Fee Name • Fee Type • Due Date • Amount • Payment Amount • Course Name • Calendar ID • Fee ID • Course ID 	Merge
Academic Program	<ul style="list-style-type: none"> • Program Name • Start Date • End Date <p><i>When the keep person doesn't have an academic program and the drop person does, the drop person's Academic Program moves to the keep person.</i></p> <p><i>If there is no academic program selected, the final warning pop-up window does not display until at least one academic program is selected when trying to merge.</i></p>	Merge
Graduation	<ul style="list-style-type: none"> • District • Date First Entered the 9th Grade • NCLB Cohort End Year • NGA Cohort End Year 	Combine

Table	Field(s)	Action
Household Member	<ul style="list-style-type: none"> Household Name Address Household ID Start Date End Date 	Merge
Identity	<ul style="list-style-type: none"> First Name Middle Name Last Name Ed-Fi ID 	Keep both records
NASIS	<ul style="list-style-type: none"> Tribal Code Certification Date Resident Agency Native Language Date of Certification ISEP Documentation on file ISEP Eligibility Certified By Navajo Chapter Home Agency 	Merge
POS Account Access	<ul style="list-style-type: none"> Number Balance Active Transactions Person ID 	Merge
POS Eligibility	<ul style="list-style-type: none"> Eligibility Type End Year Start Date End Date 	Merge
POS Identification	<ul style="list-style-type: none"> Identification ID Type 	Merge
Relationship	<ul style="list-style-type: none"> Person Name Guardian Start Date End Date 	Merge

SIF Logic Tied to the Combine Person Tool

The following SIF logic is implemented when people are merged via the Combine Person tool:

- When a District Assignment record is added for a staff member for the first time, a SIF StaffPersonal and StaffAssignment ADD event is provided.
- When a District Assignment record is updated for a staff member or an additional District Assignment record is added, a SIF StaffPersonal CHANGE event is provided.
- When the last District Assignment record is deleted for a staff member, a SIF StaffPersonal DELETE event is provided.
- When two students are combined using the Combine Person tool, a DELETE event is sent for all objects related to the discarded (merged record) person's Staff or Student (or both) RefId:
 - For students:
 - StudentPersonal
 - StudentSchoolEnrollment
 - StudentSectionEnrollment
 - StudentContact
 - StudentSectionMarks
 - StudentContactRelationship
 - StudentDailyAttendance (Delete only)
 - StudentPeriodAttendance
 - StudentActivityParticipation
 - StudentParticipation
 - StudentScoreSet
 - For staff:
 - StaffPersonal
 - StaffAssignment
- When the Combine Person tool is used to combine two person records, the primary, non-discarded person will generate a CHANGE event for the following SIF objects, which depend upon whether the person is a student or staff member (or both):
 - For students:
 - StudentPersonal
 - StudentSchoolEnrollment
 - StudentSectionEnrollment
 - StudentContact
 - StudentContactRelationship
 - StudentPeriodAttendance
 - For staff:
 - StaffPersonal
 - StaffAssignment