

Combine Person [.2211 - .2243]

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Classic View: [System Administration](#) > [Data Utilities](#) > [Combine Person](#)

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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](#)
- [Manually Cleaning up Duplicate Data Prior to Merging](#)
- [Understand the Combine Person Tool](#)
- [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 prior to 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.

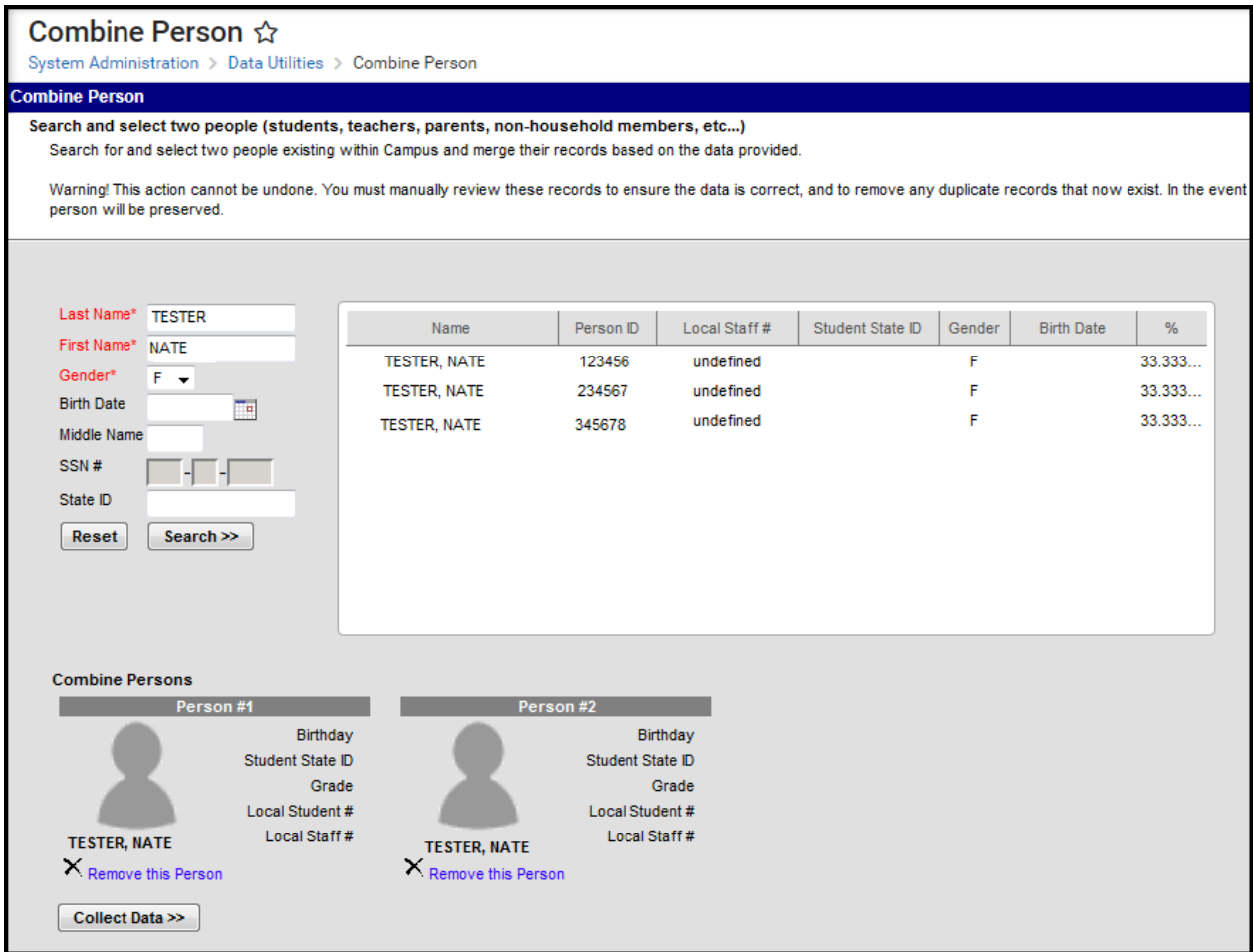


Image 1: Combine Person Tool

Tool Rights

PATH: *System Administration > User Security > Users > Tool Rights*

In order to use the Combine Person tool a user must have at least **R**(ead) tool rights added to the person's own user account (Image 2). Combine Person tool rights cannot not be added to a user group. Users with All Tools and All Calendars rights are still required to have individual tool rights marked for the Combine Person tool.

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 they are 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.

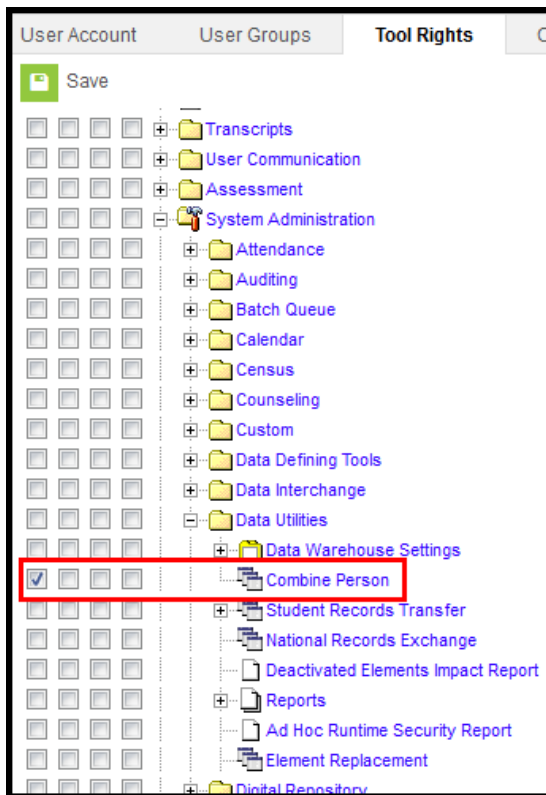


Image 2: Combine Person Tool Rights

Once tools rights are given to a user, the user must log out and back into Campus in order 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 records that are similar 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 duplicate.
- 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, those two person 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, those two persons 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.

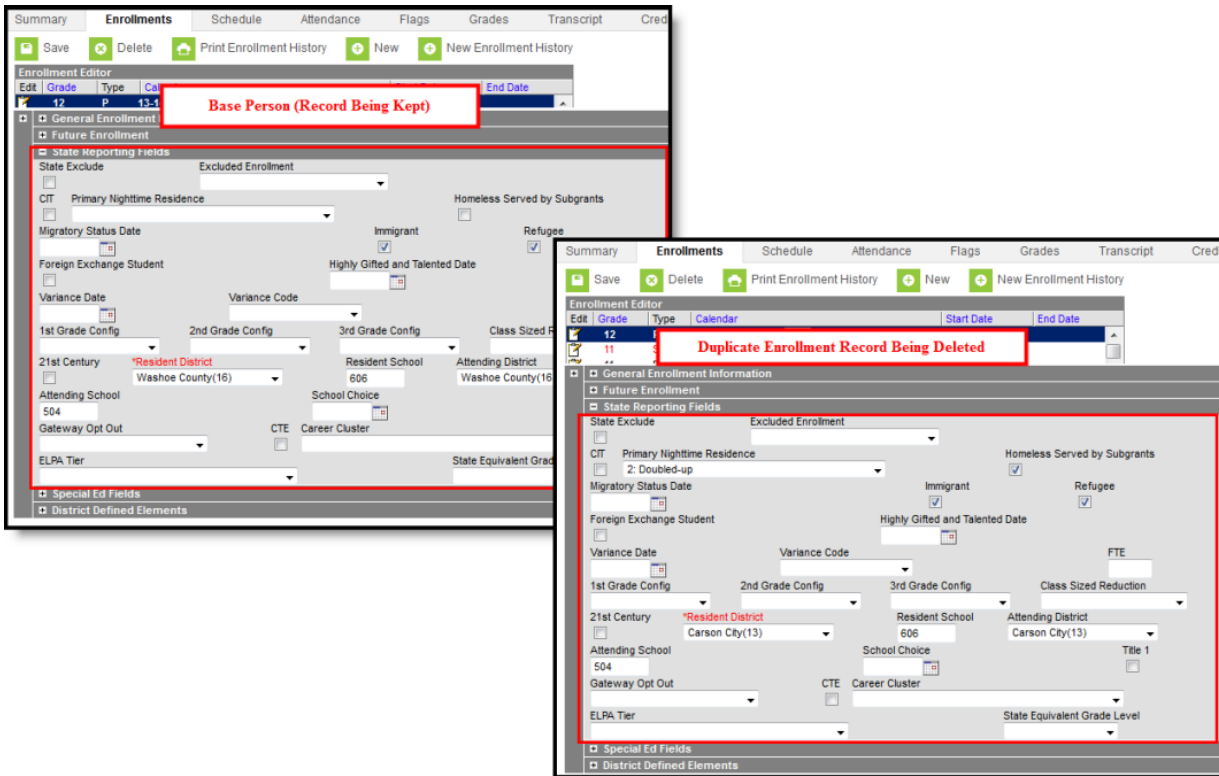


Image 3: Field Value Differences Between Two Enrollment Records

Understand the Combine Person Tool

Properly using the Combine Person tool means having a good understanding of 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 Campus.

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.

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](#)

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.

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

2. Select the **Search** button. People matching the search criteria entered will appear in the window on the right.

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).

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* Teste
First Name* Nate
Gender* M
Birth Date
Middle Name
SSN #
State ID
Reset Search >>

Name	Person ID	Local Staff #	Student State ID	Gender	Birth Date	%
Teste, Nate	141081	undefined		M	06/19/1985	100.0

Combine Persons

Person #1	Person #2
 Birthday 06/19/1985 Student State ID Grade 12 Local Student # 63 Local Staff # Teste, Nate X Remove this Person	 Birthday 06/19/1985 Student State ID Grade 12 Local Student # 66 Local Staff # Teste, Nate X Remove this Person

Collect Data >>

Image 5: Searching for the Second Duplicate Person

Now that the first duplicate person has been selected, the second duplicate person must be identified and selected. Repeat the same steps used for selecting the first duplicate person. The second selected person will appear under the Person #2 column of the Combine Persons section.

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 Staff #	Student State ID	Gender	Birth Date	%
Teste, Nate	141081	undefined		M	06/19/1985	100.0

Combine Persons

Person #1

Birthday 06/19/1985
 Student State ID
 Grade 12
 Local Student # 63
 Local Staff #

Tester, Nate

✕ Remove this Person

Collect Data >>

Person #2

Birthday 06/19/1985
 Student State ID
 Grade 12
 Local Student # 66
 Local Staff #

Teste, Nate

✕ 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.

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 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 kept.

Combine Persons

Base Person	Name	Birthdate	Student State ID	Grade	Local Student #	Local Staff #
<input checked="" type="radio"/> #1	Tester, Nate	06/19/1985		12	63	
<input type="radio"/> #2	Teste, Nate	06/19/1985		12	66	

(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 06/19/1985 SSN 123456789	<input type="checkbox"/> Teste, Nate Suffix Gender <i>M</i> Birth Date 06/19/1985 SSN 123456789
Enrollment	<input type="checkbox"/> 2012-13 Robbinsdale Armstrong	<input type="checkbox"/> 2012-13 Robbinsdale Armstrong
Enrollment History		
Academic Program		<input type="checkbox"/> Program: Gateway Curriculum
Graduation		<input type="checkbox"/> Graduation

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 (Image 8).

Module	Person #1	Person #2
Identity	<input type="checkbox"/> Tester, Nate Suffix Gender <i>M</i> Birth Date 06/19/1985 SSN 123456789	<input type="checkbox"/> Teste, Nate 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 the base person (the person who will remain after the merge,

highlighted in yellow) and select the **Preview Merge** button (Image 9).

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).

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 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.

Combine Persons

Base Person	Name	Birthday	Student State ID	Grade	Local Student #	Local Staff #
<input checked="" type="radio"/> #1	Tester, Nate	06/19/1985		12	63	
<input type="radio"/> #2	Teste, Nate	06/19/1985		12	66	

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

Module	Person #1	Person #2
Identity	<input checked="" type="checkbox"/> Tester, Nate Suffix Gender M Birth Date 06/19/1985 SSN 123456789	<input type="checkbox"/> Teste, Nate Suffix Gender M Birth Date 06/19/1985 SSN 123456789
Enrollment	<input checked="" 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 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.

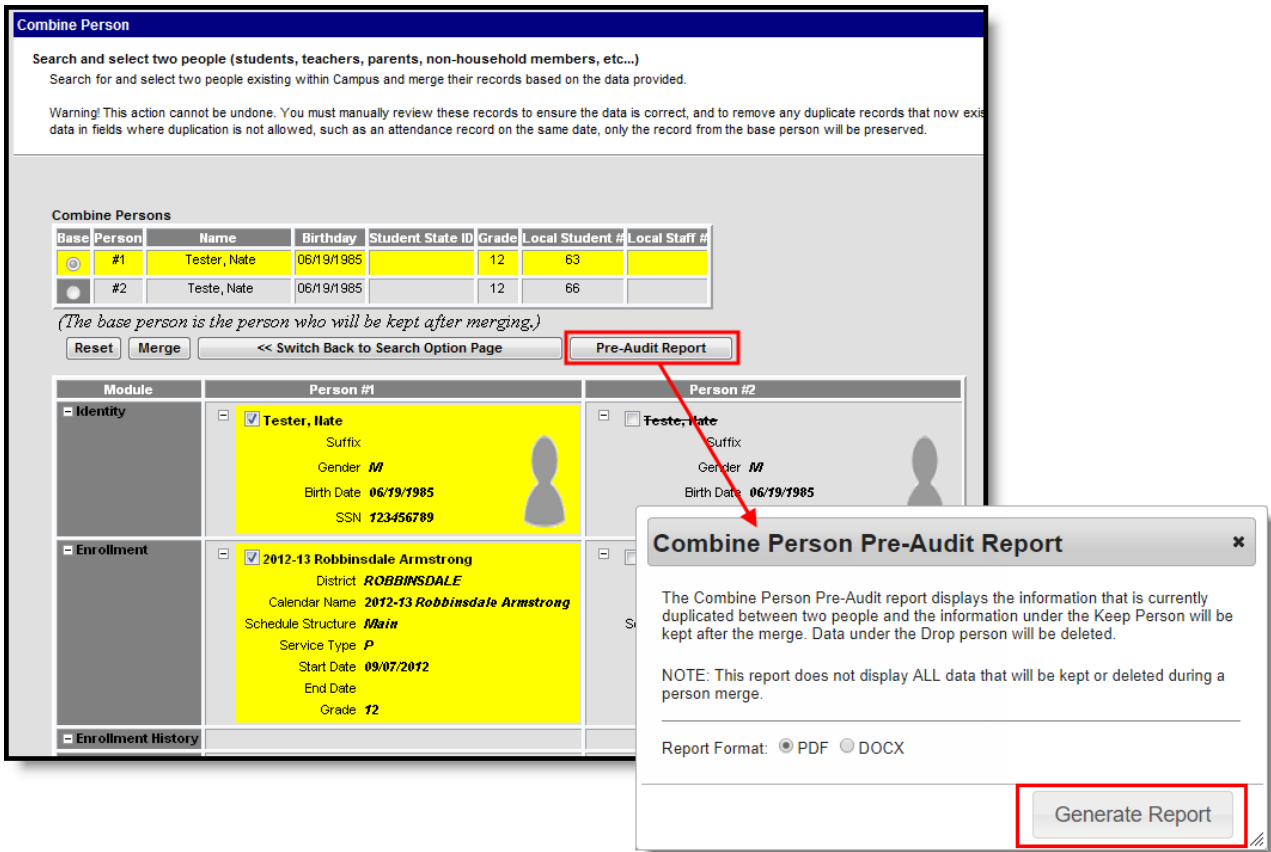


Image 10: Reviewing Merge Data

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 PDF 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

02/19/2014 : 01:49:23 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, NATE Person ID 123456 Suffix Gender Birth Date 04/30/2006 SSN	TESTING, NATE Person ID 234567 Suffix Gender Birth Date 04/30/1996 SSN
Module	Keep Person's Data	Drop Person's Data
Enrollment		
Enrollment BIE		
Academic Program		Program Name Gateway Curriculum Start Date 07/12/2010 End Date
Graduation		
Relationship		
Employment		
IIASIS		
POS Eligibility		
User Defined Data	Tab Identity Field Birth Country Value US United States Of America	Tab Identity Field Birth Country Value US United States Of America
	Tab Identity Field Birth State Value NV Nevada	Tab Identity Field Birth State Value NV Nevada
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).

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 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.

Combine Persons

Base	Person	Name	Birthdate	Student State ID	Grade	Local Student #	Local Staff #
<input checked="" type="radio"/>	#1	Tester, Nate	06/19/1985		12	63	
<input type="radio"/>	#2	Teste, Nate	06/19/1985		12	66	

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

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

Image 12: Initiating Merge

A warning message will appear, 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).

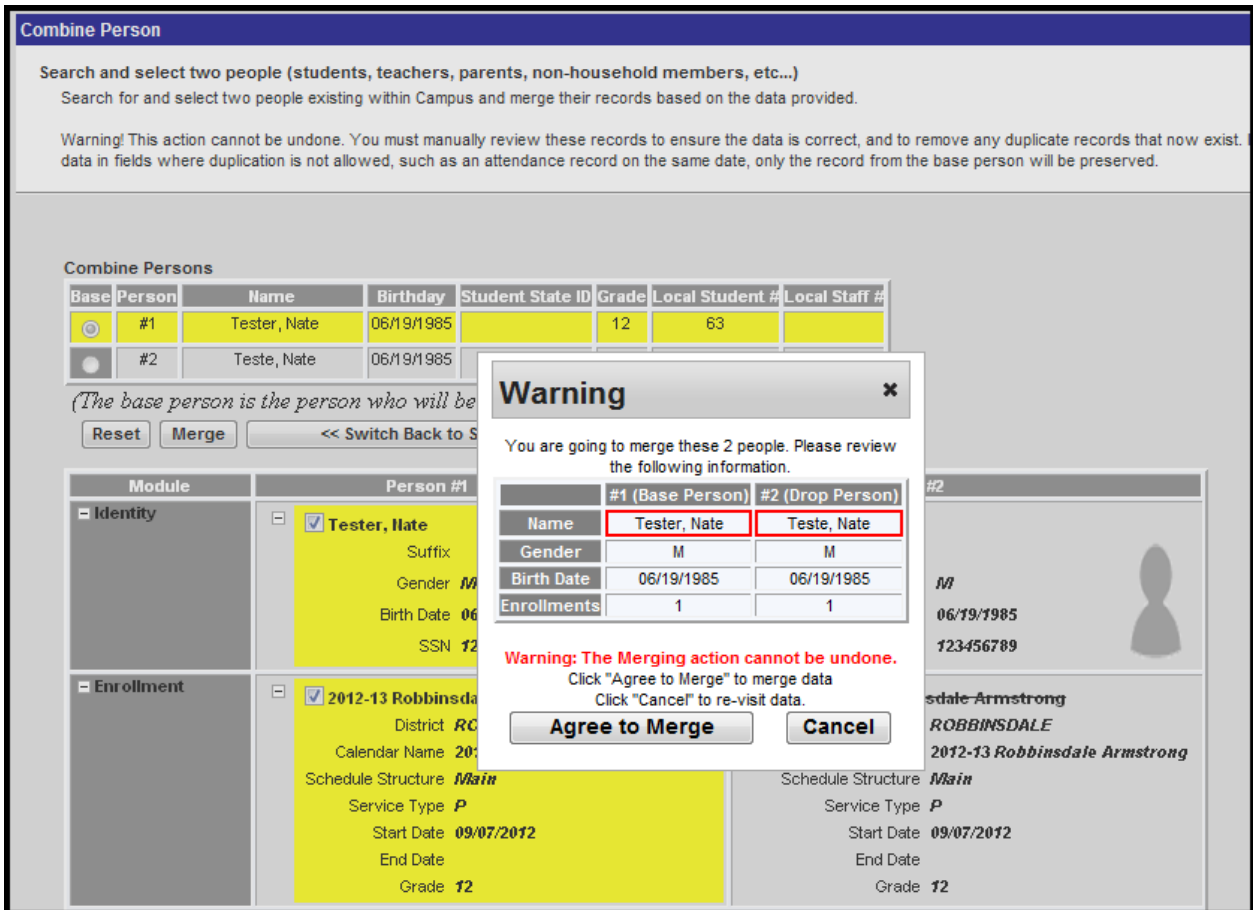


Image 13: Final Confirmation of Merge

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](#) (formerly Process Inbox) 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).

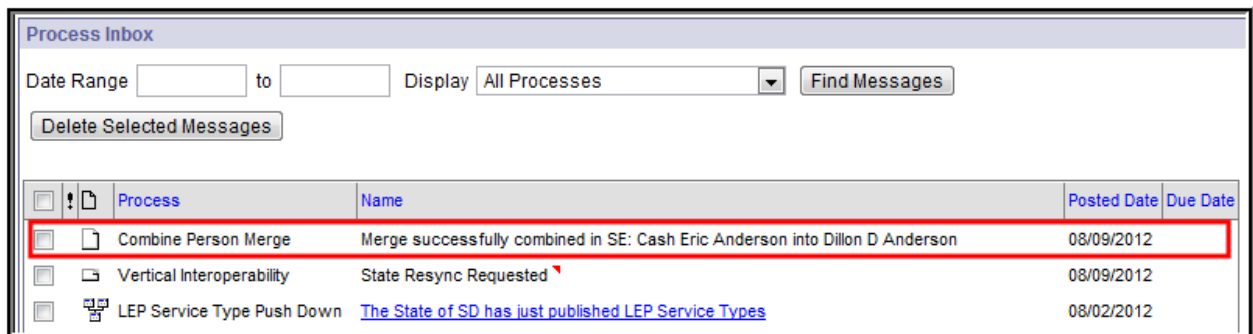


Image 14: Process Inbox Message Confirming Successful State Merge

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.

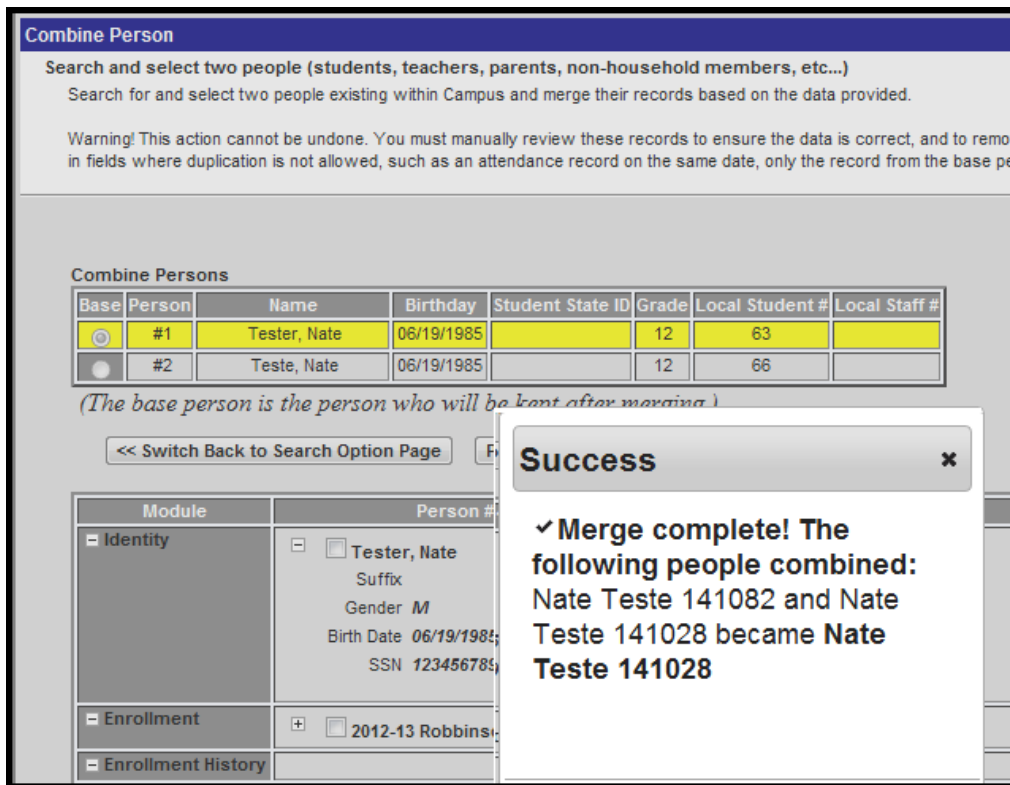


Image 15: Confirmation of a Successful Merge

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 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 records in fields where duplication is not allowed, such as an attendance record on the same date, only the record from the base person

Combine Persons

Base	Person	Name	Birthdate	Student State ID	Grade	Local Student #	Local Staff #
<input checked="" type="radio"/>	#1	Tester, Nate	06/19/1985		12	63	
<input type="radio"/>	#2	Teste, Nate	06/19/1985		12	66	

(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>06/19/1985</i> SSN <i>123456789</i> 	
Enrollment	<input checked="" type="checkbox"/> 2012-13 Robbinsdale Armstrong	
Enrollment History		

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		
07/17/2012 : 02:02:40 PM		
	Keep Person	
	Tester, Nate Person ID 141028 Suffix Gender Birth Date 06/19/1985 SSN 123456789	
Module	Keep Person's Data	Drop Person's Data
Enrollment	2012-13 Robbinsdale Armstrong District ROBBINSDALE Schedule Structure Main Service Type P Start Date 09/07/2012 End Date Grade 12 Special Ed Status 1 Special Ed Setting 00 Special Ed Disability 00	
Academic Program		
Graduation	Graduation District Name Washoe County Date First Entered the 9th Grade 08/30/2010 NCLB Cohort End Year 2014 NGA Cohort End Year 2014	
Household	Household: Page Address 4321 43rd Ave N Robbinsdale, MN 55422-1815 Start Date 07/01/2011 End Date	
	Household: Page Address 4321 43rd Ave N Robbinsdale, MN 55422-1815 Start Date 07/01/2011 End Date	
	Household: Page Address 4321 43rd Ave N Robbinsdale, MN 55422-1815 Start Date 07/01/2011 End Date	

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

Table	Field(s)	Action
Graduation	<ul style="list-style-type: none"> District Date First Entered the 9th Grade NCLB Cohort End Year NGA Cohort End Year 	Combine
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 	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