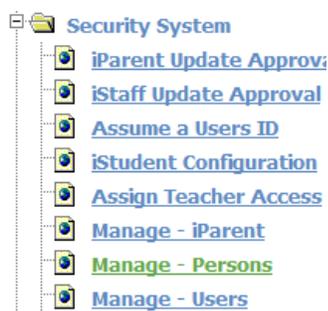# Quick Guide

HARRIS School Solutions

Merge Duplicate Guardian Records

Each Guardian should only be entered into iPASS once. There are times when Guardians have been entered EACH time a new child in the family enrolls in the district or when the Guardian is also an emergency contact for another child.
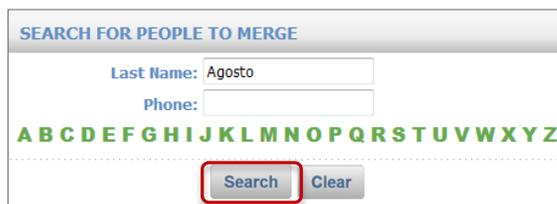
Duplicate Guardian records should be merged prior to approving an iParent account. This will make sure that all children associated with this Guardian will be linked to the same Guardian record. When any changes are made to that Guardian record, such as contact information, the update will be available in all the linked student's records.

The Merge Persons screen can be used to check to see if a Guardian already has an approved iParent account.

- Security System
    - iParent Update Approva
    - iStaff Update Approval
    - Assume a Users ID
    - iStudent Configuration
    - Assign Teacher Access
    - Manage - iParent
    - **Manage - Persons**
    - Manage - Users

A. Check to see if there are duplicate records for the same Guardian.

Go to Security System > **Manage – Persons > Merge Persons.** Enter Guardian's Last Name and click Search.

SEARCH FOR PEOPLE TO MERGE

Last Name: Agosto
Phone:

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Search   Clear

Look for the Guardian that is registering for the iParent account. If there is more than one Guardian record for the SAME person, they should be merged. Check the Address, Phone, and Students to confirm this is the same Guardian.

CAUTION: Do **NOT** merge a Guardian record with a Teacher, Nurse or Student record. These record types must remain independent user accounts.

Helpful Hint! You can check to see if this Guardian already has an iParent account. If they do, they will have a UserID listed. The Guardian records may not have been merged prior to approving the iParent account. These Guardian records can still be merged <u>into</u> the Guardian record with the existing iParent UserID.

B. If duplicate records are found for the same Guardian, use the check box to **Choose** the Guardian records to merge and click Submit.

C. The selected records will display on the **People Selected For Merge** screen.

D. Select the Guardian record to merge INTO and the data you want to use in the merged record.

   1) Click inside the Radio Button in the **Name** column of the record you want to designate as the Guardian record. <u>All the other records will merge into this one</u>.

   Helpful Hint! It is recommended that you select the Guardian record associated with the eldest child enrolled in the district. This will designate them as the Primary Student

Helpful Hint! Check the **User** column to see if there is a User ID for one of the Guardian records. This means the Guardian has already been approved for an iParent account. Be sure to merge the duplicate Guardian records in to the record with the User ID..

2) Click inside the Radio Button in the **Address** column of the same record. If the Address in one of the other records is more accurate it can be selected instead. It will be used in the Guardian record after the merge.

3) Check off the **Phone** number(s) you want to include in the record. Only select a phone number once, but select all Types you want to include.

E. Click **Submit** to merge the records.

There is now one Guardian record with one Address, Phone, and ALL associated students (children & emergency contacts) listed in the Legal: Student and Relation: Student columns.

Helpful Hint! Click on the Guardian's Name to access the Guardian record.

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