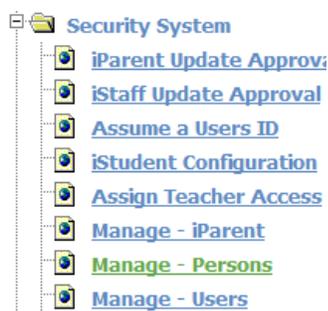


## Merge Duplicate Guardian Records

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.

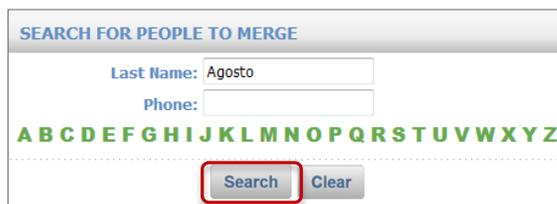
Duplicate Guardian records should be merged prior to approving an iParent account. This will make sure that all children associated with this Guardian will be linked to the same Guardian record. When any changes are made to that Guardian record, such as contact information, the update will be available 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.



- 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.



A screenshot of a search form titled "SEARCH FOR PEOPLE TO MERGE". It has two input fields: "Last Name:" with the value "Agosto" and "Phone:". Below the fields is a row of letters "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" in green. At the bottom are "Search" and "Clear" buttons. The "Search" button is highlighted with a red box.

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.



PEOPLE TO MERGE										
Choose	Name	Is Teacher	Is Nurse	Is Student	Emp ID	Address	Phone	Guardian Legal:Student	Relationship Relation:Student	UserId
<input type="checkbox"/>	Agosto, Damien					Main Street Hopelawn, 18101	717-818-6363 Home	Belinda Brandagamba	Emergency Contact:Belinda Brandagamba	
<input type="checkbox"/>	Agosto, Geraldo			<input checked="" type="checkbox"/>		25345 Main Street Hopelawn, PA 18101 12188 Main Street Hopelawn, PA 18101	717-344-6666 Home			
<input type="checkbox"/>	Agosto, John					25345 Main Street Hopelawn, PA 18101	717-634-5555 Cell 717-344-6666 Home	Custodial Parent:Martial Agosto Custodial Parent:Geraldo Agosto	Father:Martial Agosto Father:Geraldo Agosto	
<input type="checkbox"/>	Agosto, Martial			<input checked="" type="checkbox"/>		25345 Main Street Hopelawn, PA 18101 25345 Main Street Hopelawn, PA 18101	717-818-6363 Cell			
<input type="checkbox"/>	Agosto, Susan					25345 Main Street Hopelawn, PA 18101	717-634-7777 Cell 717-344-6666 Home	Custodial Parent:Geraldo Agosto	Mother:Geraldo Agosto	
<input type="checkbox"/>	Agosto, Susan					25345 Main Street Hopelawn, PA 18101	717-634-7777 Cell 717-344-6666 Home	Custodial Parent:Martial Agosto	Mother:Martial Agosto	

**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 into 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.

PEOPLE TO MERGE										
Choose	Name	Is Teacher	Is Nurse	Is Student	Emp ID	Address	Phone	Guardian Legal:Student	Relationship Relation:Student	UserId
<input checked="" type="checkbox"/>	Agosto, Susan					25345 Main Street Hopelawn, PA 18101	717-634-7777 Cell 717-344-6666 Home	Custodial Parent:Geraldo Agosto	Mother:Geraldo Agosto	
<input checked="" type="checkbox"/>	Agosto, Susan					25345 Main Street Hopelawn, PA 18101	717-634-7777 Cell 717-344-6666 Home	Custodial Parent:Martial Agosto	Mother:Martial Agosto	

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

PEOPLE SELECTED FOR MERGE								
Select Records to Merge -- Be sure to make a choice in each data column								
Merge	Name	Teacher	Nurse	Emp ID	Guardian of:	Address	Phones	User
<input checked="" type="checkbox"/>	<input type="radio"/> Susan, Agosto				Geraldo Agosto (25087)	<input type="radio"/> 25345 Main Street Hopelawn, PA 18101	<input type="checkbox"/> 717-634-7777 Cell <input type="checkbox"/> 717-344-6666 Home	
<input checked="" type="checkbox"/>	<input type="radio"/> Susan, Agosto				Martial Agosto (6321)	<input type="radio"/> 25345 Main Street Hopelawn, PA 18101	<input type="checkbox"/> 717-634-7777 Cell <input type="checkbox"/> 717-344-6666 Home	

- 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. All the other records will merge into this one.

**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..

PEOPLE SELECTED FOR MERGE								
Select Records to Merge -- Be sure to make a choice in each data column								
Merge	Name	Teacher	Nurse	Emp ID	Guardian of:	Address	Phones	User
<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Susan, Agosto				Geraldo Agosto (25087)	<input checked="" type="radio"/> 25345 Main Street Hopelawn, PA 18101	<input type="checkbox"/> 717-634-7777 Cell <input type="checkbox"/> 717-344-6666 Home	
<input checked="" type="checkbox"/>	<input type="radio"/> Susan, Agosto				Martial Agosto (6321)	<input type="radio"/> 25345 Main Street Hopelawn, PA 18101	<input type="checkbox"/> 717-634-7777 Cell <input type="checkbox"/> 717-344-6666 Home	

Check for existing iParent 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.

PEOPLE SELECTED FOR MERGE								
Select Records to Merge -- Be sure to make a choice in each data column								
Merge	Name	Teacher	Nurse	Emp ID	Guardian of:	Address	Phones	User
<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Susan, Agosto				Geraldo Agosto (25087)	<input checked="" type="radio"/> 25345 Main Street Hopelawn, PA 18101	<input type="checkbox"/> 717-634-7777 Cell <input type="checkbox"/> 717-344-6666 Home	
<input checked="" type="checkbox"/>	<input type="radio"/> Susan, Agosto				Martial Agosto (6321)	<input type="radio"/> 25345 Main Street Hopelawn, PA 18101	<input type="checkbox"/> 717-634-7777 Cell <input type="checkbox"/> 717-344-6666 Home	

- 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.

PEOPLE SELECTED FOR MERGE								
Select Records to Merge -- Be sure to make a choice in each data column								
Merge	Name	Teacher	Nurse	Emp ID	Guardian of:	Address	Phones	User
<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Susan, Agosto				Geraldo Agosto (25087)	<input checked="" type="radio"/> 25345 Main Street Hopelawn, PA 18101	<input checked="" type="checkbox"/> 717-634-7777 Cell <input checked="" type="checkbox"/> 717-344-6666 Home	
<input checked="" type="checkbox"/>	<input type="radio"/> Susan, Agosto				Martial Agosto (6321)	<input type="radio"/> 25345 Main Street Hopelawn, PA 18101	<input type="checkbox"/> 717-634-7777 Cell <input type="checkbox"/> 717-344-6666 Home	

- 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.

PEOPLE TO MERGE										
Choose	Name	Is Teacher	Is Nurse	Is Student	Emp ID	Address	Phone	Guardian Legal:Student	Relationship Relation:Student	UserId
<input checked="" type="checkbox"/>	Agosto, Susan					25345 Main Street Hopelawn, PA 18101	717-634-7777 Cell 717-344-6666 Home	Custodial Parent:Martial Agosto Custodial Parent:Geraldo Agosto	Mother:Martial Agosto Mother:Geraldo Agosto	

Submit Clear

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