

Duplicate Record Reconciliation for the Campus Community

1. Introduction

It is important to identify and merge duplicate EmplID (or WesID) records in PeopleSoft. These guidelines provide details for reconciling duplicate EmplIDs.

There are six major steps:

- i. Identify duplicates by one of these processes:
 1. Use the Search/Match Process.
 2. Run a duplicate EmplID Report for a particular constituent type.
- ii. Run a report to identify the tables associated with both duplicate records.
- iii. Determine which record is the "good record" (the record to be retained).
- iv. Update the "bad record" to identify it as a duplicate.
- v. Merge the data from the "bad record" to the "good record."
- vi. Update the "bad record" for deletion.

Individual functional areas should develop procedures for merging data.

2. Identification of Duplicate EmplID Records

- a. Identify Duplicates by using Search/Match

When entering new individuals into the system, use the Search/Match process to determine if an individual already exists in the system.

If two or more individuals are found in the search, users must verify key pieces of personal data as noted below:

- Name
 - The first or last name may have been keyed incorrectly.
 - A nickname may have been used on one of the records (e.g. Becky for Rebecca)
 - The individual's name may have changed, and there is a record under the old name.
 - There may be other pieces of information available to compare such as the birth date, SSN, and/or address to determine if the records are for the same person.
- Social Security Number (SSN)
 - The SSN may have been keyed incorrectly
 - The SSN may be missing from one of the records
 - There may be other pieces of information available to compare such as the birth date, name, and/or address to determine if the records are for the same person.
- Birth date
 - The birth date may have been keyed incorrectly (e.g. a 7 instead of a 1) on one of the records
 - The birth date may be missing from one of the records
 - There may be other pieces of information available to compare such as the SSN, name, and/or address to determine if the records are for the same person.

- b. Run Duplicate EmplID Report(s) by Constituent Type

(When running a report for the first time, you will need to create a new Run Control ID by clicking on Add a New Value. You can use any alphanumeric name that you will recognize in the future.)

Users are able to run a Duplicate Report based on EmplID “ownership.” Constituent parameters include:

- All Duplicates
- Prospect/Applicant
- Student (by Academic Career)
- Alumni
- Employee
- IDs with no Relation to Institution

Navigation: *Wesleyan Menu > Campus Community > Reports > Possible Duplicates*

The report contains a column indicating the type(s) of constituent based on the relation of the individual to the University. There may be more than one relationship associated with one person; or there may be no relationship. There is a key at the bottom of each page of the report displaying these values:

Code	Description
L	Current Alum
A	Current Applicant
P	Current Prospect
S	Current Student
E	Current Employee
I	Prior alum
a	Prior applicant
p	Prior prospect
s	Prior student
e	Prior employee

3. Determine Which is the Good Record

A decision must be made regarding which record will be kept and which will become obsolete and/or will be deleted. *When more than one office is involved in reconciling, all affected offices should communicate with each other in the decision as to which is the good record.*

As already mentioned, for the sake of simplicity, these records have been referred to as the “good record” and the “bad record.” In general, the lower numbered EmplID is an older record and may have more data associated with it.

If the records contain information which pertains only to the functional area of the staff person combining the records, the staff person should choose the good record according to their particular procedures.

When considering which EmplID should be kept, and the existing data is maintained by two or more offices, the following hierarchy is recommended:

- i. Payroll data
- ii. Student Financial data

iii. Student Records data

4. Update the Bad Record and Combine the Duplicate Records

- a. If the data cannot be easily merged, immediately make the following changes (by way of inserting a row, rather than correction) on the bad record:
 - i. For the Primary name type
 1. Change the last name to "UNMERGED"
 2. Change the first name to "RECORD, USE #####" where "#####" is the EmplID of the good record.

Because the Name field appears on every page, this should prevent users from entering additional information into the bad record.

- b. After changing the name on the bad record, the staff person(s) should update the good record with any missing information.
- c. If it is determined that the bad record cannot or should not be deleted for audit retention purposes, the record can be left in the system with the altered name. The following data elements should be deleted:
 - i. Social Security Number
 - ii. Birth date
 - iii. Email addresses

5. Update the Bad Record for Deletion

If it is decided that the bad record can safely be removed, the record should be marked in this manner. Once the data has been merged to the good record, the Primary name should be updated in the bad record as follows (using the Correction mode):

- Change the last name to "DUPLICATE"
- Change the first name to "RECORD, USE #####" where "#####" is the EmplID of the good record.

After this name is changed, all data associated with this ID will be deleted during the next run of an automated process.

Appendix A

Based upon the records identified for a particular EmplID, you may need to determine which offices should be notified to assist in determining the good record and merging data. The table below lists the key tables and contacts for each office.

**Key Tables Containing EmplIDs in SFIS/HRMS
(Alpha Order by Table)**

PeopleSoft Table	Type of Table*	Functional Office	Key Contact(s)	Ext. #
ACAD_DEGR	SR	Registrar	Paul Turenne	2352
		GLSP	Mary Kelly	3334
		Grad Office	Cheryl-Ann Hagner	2223
		University Relations	Marcy Herlihy	2523
ACAD_PROG	SR	Registrar	Paul Turenne	2352
		GLSP	Mary Kelly	3334
		Grad Office	Cheryl-Ann Hagner	2223
ACAD_SUBPLAN	SR	GLSP	Mary Kelly	3334
ACCOUNT_SF	SF	Student Accounts	Nancy McLees	2823
ADM_APPL_DATA		Admission	Diane Crescimanno	2992
ADM_PRSPCT_CAR		Admission	Diane Crescimanno	2992
BI_BILL_HEADER	SF	Student Accounts	Nancy McLees	2823
CLASS_INSTR	SR	Registrar	Paul Turenne	2352
		GLSP	Mary Kelly	3334
		Grad Office	Cheryl-Ann Hagner	2223
IMMUNIZATIONS	SR	GLSP	Mary Kelly	3334
INSTR_ADVISOR	SR	Academic Affairs	Eloise Glick	2708
ITEM_LINE_SF	SF	Student Accounts	Nancy McLees	2823
ITEM_SF	SF	Student Accounts	Nancy McLees	2823
JOB		Academic Affairs	Faculty: Eloise Glick	2708
		Human Resources	Non-Faculty: Dan Pflederer	4681
PAYMENT_TBL	PR	Student Accounts	Nancy McLees	2823
PAYROLL_DATA	PR	Payroll	Gladys Fountain	3309
PAY_EARNINGS	PR	Payroll	Gladys Fountain	3309
RECRUITERS		Admission	Diane Crescimanno	2992
RELATIONSHIPS		Admission	Diane Crescimanno	2992
		University Relations	Marcy Herlihy	2523

Wesleyan University Student/Faculty Information System

Campus Community

PeopleSoft 9.0

PeopleSoft Table	Type of Table*	Functional Office	Key Contact(s)	Ext. #
SRVC_IND_DATA		Registrar	Paul Turenne	2352
		GLSP	Mary Kelly	3334
		Grad Office	Cheryl-Ann Hagner	2223
		Student Accounts	Nancy McLees	2823
		Dean's Office	David Phillips	2757
		Financial Aid	Katherine Neville	3320
		Health Center	Martha Schukoske	2470
STDNT_CAR_TERM	SR	Registrar	Paul Turenne	2352
		GLSP	Mary Kelly	3334
		Grad Office	Cheryl-Ann Hagner	2223
STDNT_CAREER	SR	Registrar	Paul Turenne	2352
		GLSP	Mary Kelly	3334
		Grad Office	Cheryl-Ann Hagner	2223
STDNT_GRPS	SR	Registrar	Paul Turenne	2352
TRNS_CRSE_SCH		Admission	Diane Crescimanno	2992
TSCRPT_TEXT	SR	Registrar	Paul Turenne	2352
		GLSP	Mary Kelly	3334
		Grad Office	Cheryl-Ann Hagner	2223
WES_OFFICERS		Public Safety	Dave Meyer	2809
WES_VEHICLE_REG		Public Safety	Dave Meyer	2809

Key

*Recommended Hierarchy (using Type of Table):

1. PR (Payroll)
2. SF (Student Financials)
3. SR (Student Records)