Summary for
Duplicate Record Reconciliation for the Campus Community

It is recommended that on a routine basis the following offices run the Duplicate People Report. Review the detailed reconciliation guidelines for an in depth description of the procedures. There is also an outline document which describes marking duplicate records so they won't be used.

Navigation: *Wesleyan Menu > Campus Community > Reports > Duplicate Report*

- Admission
- Human Resources
- Continuing Studies/Graduate Liberal Studies
- Graduate Student Services
- Registrar
- University Relations

When a duplicate is found during Search/Match or in the Duplicate People Report (*Navigation: Wesleyan Menu > Campus Community > Reports > Possible Duplicates)*, use the following steps for reconciling a duplicate record:

1. Determine which one is the good record.

    a. If the duplicate records <u>do not</u> involve more than one office, the functional office should determine the good and bad records.

    b. If the duplicate record involves more than one office, communicate with the other office liaisons (as well as the PS Functional Analyst and HRMS Product Manager) to determine the good and bad records. The following hierarchy is recommended:

        i. Payroll data (PR)
        ii. Student financial data (SF)
        iii. Student records data (SR)

    For a list of key tables and contacts, refer to Appendix A of the detailed reconciliation guidelines.

2. Update the bad record.
    a. If the data cannot be easily merged, immediately make the following changes to the <u>Primary</u> name (by inserting new row) of the bad record:
        i. Change last name to "UNMERGED."

        ii. Change first name to "RECORD Use ######" where ###### is the EmplID of good record.

       iii. If other name types exist, they should be deleted.

       iv. Delete the SSN, birth date, and email address(es).

    b. If the data can be quickly merged or was just created in error, make the following changes to the <u>Primary</u> name (by inserting new row – using the Correction mode) of the bad record:

        i. Change last name to "DUPLICATE."

       ii. Change first name to "RECORD Use ######" where ###### is the EmplID of good record.

       iii. If other name types exist, they should be deleted.

       iv. Delete the SSN, birth date, and email address(es).

3. Merge the duplicate records.

4. Update the bad record for deletion, if needed, changing the last name to "DUPLICATE". All data associated with this ID will be deleted during the next run of an automated process.

(For a list of key tables and contacts, refer to Appendix A of the detailed reconciliation guidelines.)