Admin Session 3:

CLEANING UP STUDENT RECORDS

Portage Bay Solutions

responsive database consulting

Cleaning Up Student Records

- Adding a new student record.
- Finding “empty records” – or ones with incomplete student information
- Merging student records –vs- deleting student records, and why you’d want to do one rather than the other.
  - How to tell if it’s a duplicate student record, or one where a staff member has overwritten a student name.
- Program entry & exit
- There should be plenty of time for questions and troubleshooting tips.

Adding Student Records

- The recommended method for adding a new student:
  - Verify there is not already a record for the student by searching.
  - If a new record is needed, click the green “New” button under “Actions” on the left-hand side of the Student screen once.
  - If you use an SIS import, enter the SSID or student number to populate the student data fields. Otherwise, enter the demographic data manually.
  - Once you have assigned a case manager or evaluator, click the Active checkbox at the top of the record. This makes the student record visible to their assigned staff on the Staff screen.
  - If you use the WSIPC SIS import, go to the Special tab and enter a referral date. This will allow the student record to remain active for 45-60 days in E-Com, even if they are not yet active in Skyward.
  - You may add a program entry now, with a referral date and, if known, parent consent date. The “Enrolled in” program checkbox will not check until an start date that has past has been entered.
    - If you use SIS imports from WSIPC, when an initial IEP date is entered in Skyward, that date will carry over into E-Com and the “Enrolled in” checkbox will check automatically.
    - You may also enter a date there manually to check the appropriate “Enrolled in” checkbox. If the date is in the future, the student will show as enrolled once the date has past.

Finding Empties

- If you want to find students with an empty first name or last name field, you can use the equal sign (=) in the first name or last name field when searching.
- If you find empty student records, you can delete them, or you can just leave them until you want to add a new student (search for an empty, and enter the new student's data).

Finding Duplicates

- If you want to find students with identical information, you can use the exclamation mark (!) in the field. Note: This does not work well in the name fields, but it can be used in birth date, student number, SSID, or other fields.
- The list that is returned may have students that are not duplicates. E-Com stores past “merged” records in a hidden file, but will still find those when duplicate SSID or student numbers are searched for.
- True duplicates will have matching student names.

Partial Information

- You may run across students with partial name information.
- This occurs most often when staff have started a search before the search screen comes up, and thus have overwritten student data.
- If your district uses the SIS imports, and the student number or SSID is correct, this will be corrected during the next import.
- If your district doesn't use an SIS import, or the record is missing the matching ID, the record will need to be corrected manually.

Student Record Corrections

- Most “partial” records are found either by scanning the list of all students, or are reported by a staff member when the student name appears incorrectly on their staff screen.
- If a staff member has only overwritten the first/last names on a student screen, you can determine the correct name by checking other data.
- You may be able to get the last name from the parent information. The first name may be in forms on the student record, in the larger text fields.
- You can also make a note of the E-Com ID, and then go to Admin and select either the Access log or Form Data. Do a search for the E-Com ID, and the past history will show you what the name used to be.

Merge Students

- Sometimes you may find two student records with the same name.
- First, check them over carefully to verify that they are actually for the same student. It may be that a staff person has accidentally overwritten a student name.
  - Look at the SSID or student number, the parent names, data on forms, etc.
  - If the records are for different students, and your district uses the student update, you can delete and retype the last digit of the student number or SSID on the incorrect record. This should refresh the record and replace the proper name.
- If both records are for the same student, you can merge them.

Merge Students

- In order to merge student records, you should do a find such that you have both records as a result. ***Note: A merge will not work with more than two records.***
- Once you have the two records you want to merge, check the records over and decide which one you want to keep.
- Mark the record you want to keep as active and the other as inactive, using the Active checkbox at the top of the screen (not the enrolled program checkbox).
- Go to the menu labeled “Admin” and select “Merge Students.” Click Yes to complete the merge.
- Placement areas may need to be updated once the merge is complete.

Deleting Student Records

- The circumstances under which you would delete a student record do not occur very often. It is usually better to merge records if you find duplicates, rather than deleting them.
- While you do not lose forms and batches, you may lose other historical information for that student if you delete the record.
- However, it does occur that a student may be in a district for such a brief time that there is no history to lose, and in that case, you may want to delete the record.
  - Do a find for the student whose record you want to delete.
  - From that record, go up to the menu labeled “Records” and select “Delete Record” from the drop-down.
  - The record will be deleted, and will disappear from all staff records.
  - Note: If you need to reenter this student into E-Com in the future with the same student number or SSID, you will need to contact Portage Bay Solutions.

Exiting Students

- Once a student has left the program for any reason, you should exit them on the Special tab, by adding an end date to their program history record. You may also select an exit code and write a brief note, if you choose.
- Once you enter an end date, both the Active checkbox and the Program checkbox on the student screen should uncheck.
- Consider locking all batches at this time, to prevent accidental changes.
- The student record will remain in E-Com, along with all the forms and batches. It will no longer be visible on an assigned staff member's screen unless they uncheck the "Active Only" checkbox there. This allows them to see all students assigned to them, past and present, active or not.