Duplicate Records

The best way to manage duplicate records is to avoid creating them in the first place. By learning how to perform thorough lookup searches you reduce the likelihood of creating a duplicate record. Please refer to the Lewis & Clark Data Entry Standards document for procedures and other relevant data entry information.

Because of the complexity of the file structure of Colleague and Benefactor, there is no way to purge person records from the system after the record has moved past the “prospect” stage. Since we cannot purge these records, the following document provides instructions on how to handle duplicate records.

Identifying Duplicate Records

Identifying duplicate records is not as easy as it sounds. Sometimes two different people have the same first and last name. It is even possible that to different people have the same middle name, or at least middle initial. It is critical to search thoroughly before entering a new person. Use the lookup functionality to try various ways of finding a person. For example: name search, nickname search (or names that are commonly abbreviated), social security number, etc. Your task is to decipher if two records are truly two different people, or if one is a duplicate entry.

When you have identified two (or possibly more) records as duplicates, the next step is to determine which is the “correct” record. This involves some investigation and collaboration with appropriate offices on campus. It is important to analyze each record so you can determine which will be flagged as a duplicate and which will continue as active.

PLEASE do not make changes without contacting the following offices: Admissions, Registrar, Student Financial Services, Cashier, Business Office, Human Resources, and Research & Records. This can be accomplished by sending email to <lc-datatel@lclark.edu>. If you need assistance consolidating the information found on the records, or if you have other questions, please contact Information Systems.

Marking a Record as DUPLICATE

After identifying the one record that will be “frozen” and no longer updated, follow the steps below:

1. Go into the ADR screen and pull up the duplicate record.
2. From the Address Resolution screen, select the current home address.
3. From the first line on Field 1, use Window Insert ,<F6>, to insert a new line in the address.
4. Type =**DUPLICATE** on the new line. (The equal sign overrides the capitalization rule and maintains your entry exactly as typed.)
5. Go to Field 20 and enter **C** for Correction, as the source.
6. Update <F12> the record.
7. At the prompt: “Do you want to keep address history?” type **N**.
8. Next, go into the BIO screen and pull up the duplicate record.
9. Go to Field 4 and type =**DUPLICATE** in the Last Name field.
10. At the prompt: “is this a name change?” type **Y**.
11. At the prompt: “Is this a (B)irth or an (O)ther name change:” type **O**.
12. Type =**XREF:XXXXXXX** in the First Name Field, where XXXXXXX is the correct ID Number.
13. Delete the Middle Name.
14. Go to Field 13 and delete the Social Security Number.
15. Go to Field 18 and type **X** for the Privacy Code. (The privacy code “locks” the record so it cannot be accessed.)
16. Update <F12> the record.