The**Financial**Edge™

The**Education**Edge™
Integrating Student Billing With The Education Edge

Contents

Integrating Student Billing with Education Edge

Welcome to the *Integrating Student Billing with The Education Edge* guide. **The Education Edge** includes the **Admissions Office** and **Registrar's Office** programs.

> **Note:** Visit our website at www. blackbaud.com for the latest documentation and information.

Integrating **Admissions Office** and **Registrar's Office** with **Student Billing** means the admissions office, registrar's office, and billing office in a school share the same records in the same database. The result of this integration is a more efficient data entry process and reduced data entry errors.

This guide details how to prepare for the integration and how your **Student Billing**, **Admissions Office**, and **Registrar's Office** programs interact once you have converted your data and completed the merge process.

To access our system recommendations, select **System Recommendations** from the **Support** menu on our website at www.blackbaud.com.

Integration Planning Checklist

We recommend you follow this checklist in your planning for integration.

❑ Create an integration team. To prepare for the integration, we recommend you create an integration team. By creating an integration team, you can raise awareness, set common goals, and get everyone working together.

This team should include representatives from the offices that use the programs you plan to integrate. These representatives must be familiar with data entry practices in the database they use.

> **Warning:** In an integrated system, and **Student Billing** share the same database.

❑ Discuss processes. Members of the integration team should discuss how they enter and maintain data. We recommend spending time in each school office to better understand the different processes.

❑ Evaluate current data. We recommend you go through the data and identify fields used for alternate purposes between programs. You should also review the contents of shared code tables. To do this, you can print code table reports for comparison. For more information about code tables, see "Shared Code Tables" on page 3.

❑ Remove duplicates. You can run duplicate reports in each program to identify possible duplicates and review common records for discrepancies in data entry. Be sure to address all record types and pay close attention to siblings and their families. Once duplicates have been identified, the integration team can decide which records to delete.

> **Note:** If you have records or transactions that you no longer need, we recommend you purge them before converting. Before purging records and transactions, make sure you are on the latest version of **Student Billing 6** and that you have run all the necessary patches.

❑ Prepare your data. You should standardize your code tables. You can use query and global change to consolidate like values.

Shared Records

Shared records in **The Education Edge** and **Student Billing** include student, individual, faculty/staff, and organization records. A record created or deleted in **Student Billing** is also created or deleted in **The Education Edge**. Both programs display some of the same information such as name, current grade, and relationships. You can update records that contain this information in either program.

> **Note:** applicant-only records are not available in **Student Billing** for billing purposes. You can see relationships but you cannot view applicants directly from **Student Billing** unless they are also students.

Students. Student records are shared across *The Education Edge* and *Student Billing*. You can update student records in either program. Biographical information such as demographics and current grade is shared.

The current status in *The Education Edge* and billing status in *Student Billing* are separate. *Student Billing* has access to *Education Edge* current status as enrollment status. You can use business rules to create defaults for these statuses.

For more information about business rules, see the *Configuration Guide for Student Billing*.

Individual. Individual and faculty/staff records in *The Education Edge* are displayed as individual records in *Student Billing*. These records were called parent/guardian records in *Student Billing 6*.

Organization. Organization records are shared across *The Education Edge* and *Student Billing*. Organizations can be billed, pay for, and review statements for any other record.

Faculty/Staff. Individual and faculty/staff records in *The Education Edge* are displayed as individual records in *Student Billing*.

> **Warning:** You cannot add faculty/staff records from *Student Billing* if you have installed.

Additionally, current teacher and current advisor fields are available.

Shared Functionality

Once you have integrated your programs, much of the functionality is shared.

Student Progression. Student progression is an *Education Edge* feature that provides the ability to track school, grade, and academic year historically and in the future. Student progression is available from *Student Billing* only as read-only.

Enrollment Information. *Student Billing* does not have an Enrollment tab like *The Education Edge*. However, there is an enrollment section on the Bio 2 tab. The enrollment information is read-only if you have *Registrar's Office*.

Addresses. Addresses are shared including primary and address types table. You can track address changes on the History of Changes tab. With address types, you can use different addresses for statements and report cards.

Addressees/Salutations. Addressees/Salutations have shared configuration and share the Addressees/Salutations tab.

Query and Export. A sub-set of defined fields are shared between Query and Export.

Relationships. Relationships are shared.

Configuration. There are shared business rules for creating IDs and calculating ages. Some tables and field characteristics are shared.

For a complete list of shared code tables, see "Shared Code Tables" on page 3.

Financial Aid. Financial aid (applications) is available in *Student Billing* based on security settings. In *Student Billing* you can create financial aid schedules from accepted financial aid applications. Reporting, queries, and exports present information across the financial aid applications and financial aid schedules.

The attributes and tables for financial aid (applications) are shared across the *Education Edge* and *Student Billing* programs.

Shared Code Tables

Shared code tables include:

Address Type	Language

Address/Sal type	Letters - Financial Aid
Affiliation	Marital Status
Birth City	Organization Type
Board Type	Phone Type
Church Affiliation	Reason Left
City	Region
Country	Relationship
County	Religion
Currency Type	State
Ethnicity	Student/Applicant Status
Financial Aid Category	Suburb
Financial Aid Type	Suffix
Grade Levels	Title
Industry	

What is not Shared?

Note: Applicants with billing information coming from *Academy Manager* are converted as students. Once an applicant becomes a student, the student record is immediately available in *Student Billing*.

Applicants. *Education Edge* applicant-only records are not available in *Student Billing* for billing purposes. You can see relationships but you cannot view applicants directly from *Student Billing* unless they are also students.

You can bill applicants through *Cash Receipts*. You can bill parents for applicants in *Student Billing*. If you have *Admissions Office* and *Student Billing*, *Admissions Office* has the ability to enroll applicants as students in *Student Billing*. Applicants with billing information coming from *Academy Manager* are converted as students. Once an applicant becomes a student, the student record is immediately available in *Student Billing*.

Actions and Notes. The Actions and Notes tabs are not shared across programs.

Media and Attributes. The Media and Attributes tabs are not shared across programs.

Annotations. Annotations are not shared across programs.

Multiple Schools. In *Student Billing 7* you can set up a billing configuration to model your multi-school environment. For example, you can create bill codes and then generate transactions for specific billing items and bill codes.

Security

Education Edge and *Student Billing* security is set up separately, even for shared records. However, delete functionality is allowed only if a user has access to delete in both programs.

Promotion

In an integrated system, promotion is handled in *Registrar's Office*. From *Registrar's Office*, re-enrollment creates the next year's student progression. This allows scheduling of next year to occur before promotion. The end of year processing is the promotion because it updates current grade based on student progression.

> **Note:** The current grade for students is shared across systems.

If you do not have *Registrar's Office*, you can promote from *Student Billing*. In *Student Billing* you can generate transactions based on the student progression. You can also bill for the next year before promoting. Grade-based billing uses student progression.

Merging Records

The merge process moves information from the duplicate faculty/staff, individual, organization, applicant, and student records, to the primary records.

> **Warning:** As a precaution, we recommend running a backup each time you merge records.

Once you have integrated *Admissions Office* and *Registrar's Office* with *Student Billing*, you can merge the records converted from *Student Billing* with records in *Education Edge*. The merge utility merges records that match based on the duplicate criteria you define, such as last name, first name, and address. The result is a single record that contains a combination of information from both records.

Review Data Entry Practices Across Offices

Before merging duplicate records, we recommend you review processes that occur in your student billing, admissions, and registrar's office to find out what has been done differently in the past.

For example, fields present in all three offices could be used for different reasons or could have different values entered even though used for the same purpose. We recommend reviewing all the information about what is shared and what is not shared to ensure that the information can and should be merged together.

Update Any Data Necessary Before Merging

If while reviewing your data entry practices you find the different offices doing things differently, this may require that you make updates to data so that the information can be merged.

For example, all three offices might use grade levels to enter information about the applicants and students, however, the actual values used may be different. Your billing office may use 9th, 10th, etc., while your registrar's and admissions offices use 09, 10, etc. In this case you will want to standardize the table entries across your offices before merging and will want to merge table entries so your *Student Billing* records can match your *Registrar's Office* records.

Use the information in the Integration Planning Checklist for integration between *Education Edge* and *Student Billing* along with information in the "How Information on Duplicate Records Merges with the Primary Record" on page 11 to determine what areas may need to be updated before merging.

Determine What Records are Considered Primary

Previous data entry practices can greatly impact how you determine which records are considered primary. You should consider which offices kept information most up-to-date when determining which records should be considered primary. You should also consider how up-to-date the Biographical information, Enrollment information, and Demographics information is when determining primary. For more information see "How Information on Duplicate Records Merges with the Primary Record" on page 11.

If records created by the *Student Billing* conversion need to be designated primary because the data is more up-to-date, you need to consider that the Current status created for those records for *Registrar's Office* are just a default and do not reflect the appropriate current status. This is why the **Keep current status from the duplicate record** option is so important. If your *Student Billing* records are going to be considered primary, the enrollment information from that *Student Billing* record will be merged with the enrollment information from the *Registrar's Office* record, however, the *Student Billing* record's information will be retained if both records have information present. You will not want this for the **Current status** field since the *Registrar's Office* record has the most up-to-date information. Selecting the **Keep current status from the duplicate record** will ensure the appropriate current status is retained in this case.

If records already present from *The Education Edge* need to be considered primary because the data is more up-to-date, you need to consider that the billing status created for those records for *Student Billing* are just a default and do not reflect the appropriate billing status. This is why the **Keep billing status from the duplicate record** option is so important. If your *Registrar's Office* records are going to be considered primary, the Biographical information from the *Student Billing* record will be merged with the Biographical information from the *Registrar's Office* record, however, the *Registrar's Office* information will be retained if both records have information. You will not want this for the **Billing status** field since the *Student Billing* record has the most up-to-date information. Selecting **Keep billing status from the duplicate record** will ensure the appropriate billing status is retained in this case.

You should also consider how Enrollment information will be merged between student records, especially when one of the records is also considered an applicant record. Enrollment information is matched based on the School enrolled value and Grade enrolled value. If this information does not match, the duplicate record's enrollment information is appended to the primary record. The primary record's information is considered the active enrollment. If the *Student Billing* record is considered the primary record and one of the records is also considered an applicant, the current status information will not match when viewing information from the applicant side versus the student side because different records are considered the active application/enrollment. If you choose *Student Billing* records as your primary records, you should ensure the enrollment information from those records will be merged accordingly to avoid this situation. One way to accomplish this is to select Grade enrolled as a column on the preview tab, review the results on the preview, and not merge any record where the Grade enrolled does not match. You can go through these records to either update the *Student Billing* record or to make the *Registrar's Office* record primary.

You have three options when selecting which record is considered the primary record when merging. The "Date last changed" option allows you to determine the primary record of matching records based on the record last updated. "The record with the attribute added by Student Billing conversion" option allows you to specify the primary records of matching records are those records converted by *Student Billing*. Selecting "The record without the attribute added by Student Billing conversion" allows you to specify the primary records of matching records are those records already present from *The Education Edge*. After conversion, we recommend you determine which system your school kept more up-to-date, use either of the last two options based on that information.

Determine What Fields To Use When Matching Records

When determining what fields to use when matching records, the data entry practices of the different offices are important. You should consider matching only on those fields that were used to track the same information. For example, **Birth date** is a field commonly populated in *The Education Edge* but not always populated in *Student Billing*. You will only want to use this field if it has been entered in both systems consistently.

Student ID is another field that you should not use to match records unless both offices have been entering the same student ID value for a student.

We recommend using fields such as **Last name**, **First name**, and **Address** to match records. With each of these fields you can designate the number of characters to check. This is very helpful with addresses because you may only want to check the first 10 characters of the address, especially in situations where data entry practices across offices do not match. We do attempt to match using address equivalents, however, this may not cover every situation at your school. You may decide to include additional fields based on your school's data entry practices.

In addition, you may want to complete multiple runs of merging records. Consider using more fields to match with initially and then loosen the criteria with each merge.

Create Manageable Groups of Records to Merge

When merging records we recommend you work with records in small groups so you can review records being merged before you actually perform the merge. For example, you could break records into the following groups:

- Students - 9th grade
- Students - 10th grade
- Students - 11th grade
- Students - 12th grade
- Individuals - Last name A through F
- Individuals - Last name G through K
- Individuals - Last name L through O
- Individuals - Last name P through S
- Individuals - Last name T through Z

By breaking records into small groups, you can open records and review data to ensure appropriate records are being merged and appropriate records are considered primary.

You should also make sure none of the records included have a blank primary address. You are able to review the data in the **Primary Address Block** column to determine which records do not have primary addresses. If any row does not have data in the column, determine if the row is considered a duplicate row. If the row is considered a duplicate record, the blank primary address will be merged with the populated primary address of the primary record. If the row is considered a primary record, we suggest you do not merge that row and determine why the record does not have a populated primary address.

Determine How Addresses Should Match

When merging addresses the system uses the most restrictive options available. We recommend using information gathered from reviewing your data entry practices to determine the fields to use when merging addresses. You may find that different Address Types were used when tracking addresses in the different offices even though the addresses are the same. In this case, you may not want to use Address Type to match addresses.

Review Merge Records Results

While merging records you can create output queries. We recommend creating these queries so you can review the records after completing the run of merge. This ensures the process worked as expected. If the process did not run as expected, you should not continue merging. At this point, restore to the back up created before running the merge records process.

Merge Considerations

Before running the merge utility, review the following information and recommendations:

- Each time you run the merge utility, we recommend you make a valid backup of the database. Large amounts of data are being manipulated during this process, and without a backup, correcting the data could be difficult. You can recover merged records only by restoring to a backup.

- The amount of time it takes to run the merge utility will vary depending on your hardware and how many records you are merging.

- If you are trying to merge a large number of records, you should run the merge utility multiple times using different duplicate criteria.

- To ensure applicant and student relation information merges successfully, we recommend you merge applicant and student records before merging individual and faculty/staff records.

- We recommend you merge duplicate records instead of deleting one of them so you do not lose any information.

- If you have saved merge parameter files, we recommend you review and validate the accuracy of your parameter files before merging. You should save any parameter files you create for future reference.

- If you previously used *Academy Manager* to integrate these programs in version 6 before converting to version 7, we recommend you first run the merge utility using Academy ID as the criteria. Then run again using name and address as the criteria.

- *Education Edge* and *Student Billing* security is set up separately, even for shared records. However, delete functionality is allowed only if a user has access to delete in both programs.

- You can merge multiple records at one time, however, we recommend running merge in groups.

- If you want to merge a student and individual, or applicant and individual, the individual will need to be converted first.

- When merging faculty and individual records, if the individual record has attributes which are not set up in *Configuration* for faculty records, the attributes for the individual record will be deleted during the merge process. To ensure these attributes are not deleted, the same attributes must exist on the faculty record prior to merging.

- When you integrate *Admissions Office* and *Registrar's Office* with *Student Billing*, all the new student records will have an active billing status if you selected "Active" for the **When an applicant is enrolled or a new student is created in Education Edge, default billing status to [ ]** business rule in *Student Billing*. This is why the **Keep billing status from the duplicate record** option on the merge parameter form is very important.

- If records created by the *Student Billing* conversion need to be designated primary because the data is more up-to-date, you need to consider that the Current status created for those records for *Registrar's Office* are just a default and do not reflect the appropriate current status. This is why the **Keep current status from the duplicate record** option on the merge parameter form is very important.

- Not merging duplicate records can be a form of data corruption. For example, in an integrated system, you might have two records per student in your database. Changes that users make to one record, such as phone number and address updates, will not be reflected on the other record. Therefore, *Registrar's Office* users and *Student Billing* users will not view the same information when accessing a record.

Comparing Addresses

When comparing addresses, the program ignores punctuation and uses address abbreviation equivalents to search for addresses that are the same but may be punctuated or abbreviated differently.

Punctuation

The following punctuation is ignored in the address text fields when searching for duplicate addresses:

Hyphen	Colon	Apostrophe
Period	Semicolon	Parenthesis

Carriage
return/line
feed

This punctuation is also ignored in phone types with a phone number type of Telephone Number, Fax Number, or Other, but not in phone types with a phone number type of Email Address or Web Address/URL.

Address Abbreviation Equivalents

This table lists the address abbreviation equivalents the program uses when comparing address lines.

Address	Equivalent	Address	Equivalent	Address	Equivalent
Annex	Anx	Freeway	Fwy	Rest	Rst
Apartment	Apt	Gardens	Gdns	Ridge	Rdg
Arcade	Arc	Gateway	Gtwy	River	Riv
Avenue	Ave	Glen	Gln	Road	Rd
Bayou	Byu	Green	Grn	Shoal	Shl
Beach	Bch	Grove	Grv	Shoals	Shls
Bend	Bnd	Harbor	Hbr	Shore	Shr
Bluff	Blf	Haven	Hvn	Shores	Shrs
Bottom	Btm	Heights	Hts	Spring	Spg
Boulevard	Blvd	Highway	Hwy	Springs	Spgs
Branch	Br	Hill	Hl	Square	Sq
Bridge	Brg	Hills	Hls	Station	Sta
Brook	Brk	Hollow	Holw	Stravenue	Stra
Burg	Bg	Inlet	Inlt	Stream	Strm
Bypass	Byp	Island	Is	Street	St
Camp	Cp	Islands	Iss	Summit	Smt
Canyon	Cyn	Isle	Isle	Terrace	Ter
Cape	Cpe	Junction	Jct	Trace	Trce
Causeway	Cswy	Key	Ky	Track	Trk
Center	Ctr	Knolls	Knls	Trail	Trl
Circle	Cir	Lake	Lk	Trailer	Trlr

Address	Equivalent	Address	Equivalent	Address	Equivalent
Cliffs	Clfs	Lakes	Lks	Tunnel	Tunl
Club	Clb	Landing	Lndg	Turnpike	Tpke
Corner	Cor	Lane	Ln	Union	Un
Corners	Cors	Light	Lgt	Valley	Vly
Course	Crse	Loaf	Lf	Viaduct	Via
Court	Ct	Locks	Lcks	View	Vw
Courts	Cts	Lodge	Ldg	Village	Vlg
Cove	Cv	Manor	Mnr	Ville	Vi
Creek	Crk	Meadows	Mdws	Vista	Vis
Crescent	Cres	Mill	Ml	Wells	Wls
Crossing	Xing	Mills	Mls	West	W
Dale	Dl	Mission	Msn	East	E
Dam	Dm	Mount	Mt	North	N
Divide	Dv	Mountain	Mtn	South	S
Drive	Dr	Neck	Nck	Northeast	NE
Estates	Est	Orchard	Orch	Northwest	NW
Expressway	Expy	Pkwy	Pky	Southeast	SE
Extension	Ext	Parkway	Pky	Southwest	SW
Falls	Fls	Pines	Pnes	First	1 or 1st
Ferry	Fry	Place	Pl	Second	2 or 2nd
Field	Fld	Plain	Pln	Third	3 or 3rd
Fields	Flds	Plains	Plns	Fourth	4 or 4th
Flats	Flt	Plaza	Plz	Fifth	5 or 5th
Ford	Frd	Point	Pt	Sixth	6 or 6th
Forest	Frst	Port	Prt	Seventh	7 or 7th
Forge	Frg	Prairie	Pr	Eighth	8 or 8th

Address	Equivalent	Address	Equivalent	Address	Equivalent
Fork	Frk	Radial	Radl	Ninth	9 or 9th
Forks	Frks	Ranch	Rnch	Tenth	10 or 10th
Fort	Ft	Rapids	Rpds		

How Information on Duplicate Records Merges with the Primary Record

This table provides information about how data on duplicate records merges with data on the primary record.

Information	Record Type	What happens?
Bio 1	All person records	Copies information if on duplicate but not on primary, but does not replace existing data.
Bio 2 / Birth Information	Applicant/Student - all views	Copies information if on duplicate but not on primary, but does not replace existing data.
Bio 2 / Billing Information and Billing Defaults	Student in **Student Billing**	Copies information if on duplicate but not on primary, but does not replace existing data.
Bio 2 / In-state Resident and Recruiting Information	Applicant in **Admissions Office**	Copies information if on duplicate but not on primary, but does not replace existing data.
Bio 2 / Other Schools Applied To	Applicant in **Admissions Office**	Entries on duplicates are added to primary (though only one can have the **Attending** checkbox marked).
Bio 2 / Dormitory, Phone number, Roommate, Room, and Transportation	Student in **Registrar's Office**	Copies information if on duplicate but not on primary, but does not replace existing data.
Bio 2 / Lockers and Cars	Student in **Registrar's Office**	Entries on duplicates are added to primary.
Bio 2 / Date hired, Terminated on, Reason	Faculty/Staff	Copies information if on duplicate but not on primary, but does not replace existing data.

Information	Record Type	What happens?
Bio 2 / Department/Position, Education, Certifications	Faculty/Staff	Any entries on duplicate but not on primary are added.
Visa/Passport	Applicant/Student - **Admissions Office** and **Registrar's Office** views, Faculty/Staff	Copies information if on duplicate but not on primary, but does not replace existing data.
Demographics	Applicant/Student - all views, Faculty/Staff, Individuals	Copies information if on duplicate but not on primary, but does not replace existing data.
Photo	Applicant/Student - all views Faculty/Staff, Individuals	Copies information if on duplicate but not on primary, but does not replace existing data.
Primary address	All records	A record must have a primary address. If primary record does not have a primary address, the primary address from a duplicate record will be added. If an address matches on the duplicate and primary records, but there are contacts on the duplicate record that are not on the primary record, the contacts are added to the address on the primary record. However, if a contact type is already in use on the primary record, the contact number for that contact type will only be copied from the duplicate if the contact number on the primary is blank.

Information	Record Type	What happens?
Additional addresses	All records	Any entries on duplicate but not on primary are added. If an address matches on the duplicate and primary records, but the address on the duplicate record is linked to records not linked to on primary record, the links are added to the address on the primary record. If an address matches on the duplicate and primary records, but there are contacts on the duplicate record that are not on the primary record, the contacts are added to the address on the primary record. However, if a contact type is already in use on the primary record, the contact number for that contact type will only be copied from the duplicate if the contact number on the primary is blank.
Primary addressee and Primary salutation	All person records	If primary record does not have a primary addressee or salutation, the primary addressee or salutation from a duplicate record will be added.
Additional addresses and salutations	All person records	Any entries on duplicate but not on primary are added.

Information	Record Type	What happens?
Attributes	All records	Entries on duplicates are added to primary. If a unique attribute exists on the primary record, attributes from the same category on the duplicate record cannot be added. For applicant/students, merging is specific to each view: applicant view in **Admissions Office**, student view in **Registrar's Office**, and student view in **Student Billing**.
Notes	All records	Entries on duplicates are added to primary. For applicant/students, merging is specific to each view: applicant view in **Admissions Office**, student view in **Registrar's Office**, and student view in **Student Billing**.
Actions	All records	Entries on duplicates are added to primary. For applicant/students, merging is specific to each view: applicant view in **Admissions Office**, student view in **Registrar's Office**, and student view in **Student Billing**.
Media	All person records	Entries on duplicates are added to primary. For applicant/students, merging is specific to each view: applicant view in **Admissions Office**, student view in **Registrar's Office**, and student view in **Student Billing**.

Information	Record Type	What happens?
Financial Aid	Applicant/Student - all views	Any entries on duplicate but not on primary are added. If the same academic year exists on both, information from the duplicate is added if it does not exist on the primary.
History of Changes	All records	An entry is generated only when information is added to key fields on the primary record.
Relationships	All records	Any entries on duplicate but not on primary are added. If the same relationship exists on both, information from the duplicate is added if it does not exist on the primary.
Activities	Student in *Student Billing*	Entries on duplicates are added to primary.
Annotations	Student in *Student Billing*	Any entries on duplicate but not on primary are added.
Exceptions on Payers	Student in *Student Billing*	Any entries on duplicate but not on primary are added.
Statements	Student in *Student Billing*	Any entries on duplicate but not on primary are added.
Bill Codes	Student in *Student Billing*	Any entries on duplicate but not on primary are added.
EFT Bank Information	Student in *Student Billing*	Any entries on duplicate but not on primary are added.
Default Schedules	Student in *Student Billing*	Any entries on duplicate but not on primary are added.
Automatic Payments	Student in *Student Billing*	Entries on duplicates are added to primary.

Information	Record Type	What happens?
Student Progression	Student in **Student Billing**	Any entries on duplicate but not on primary are added.
Education	Applicant/Student in **Admissions Office** and **Registrar's Office**	Any entries on duplicate but not on primary are added.
Tests	Applicant/Student in **Admissions Office** and **Registrar's Office**	Any entries on duplicate but not on primary are added.
Medical	Applicant/Student in **Admissions Office** and **Registrar's Office**	Any entries on duplicate but not on primary are added.
Activities	Applicant/Student in **Admissions Office** and **Registrar's Office**	Any entries on duplicate but not on primary are added.
Conduct	Student in **Registrar's Office**	Any entries on duplicate but not on primary are added.
Applications	Applicant in **Admissions Office**	Any entries on duplicate but not on primary are added. If an entry matches on the duplicate and primary based on Year Apply, information from the duplicate entry is added if it does not exist on the primary entry. An applicant view can be created for a primary record if the School and Current Status of an application on the duplicate matches an enrollment on the primary.

Information	Record Type	What happens?
Enrollments	Student in *Registrar's Office*	Any entries on duplicate but not on primary are added. If an entry matches on the duplicate and primary based on School and Grade Enrolled, information from the duplicate entry is added if it does not exist on the primary entry. A student view can be created for a primary record if the School and Current Status of an enrollment on the duplicate matches an application on the primary.
Schedule Changes	Student in *Registrar's Office*	Any entries on duplicate but not on primary are NOT added. Changes can be recorded when enrollments are added to a primary record during merge. If a class is added to the primary record and a change is recorded, **Changed On** and **Changed By** will display the date of the merge and the user who ran the merge. You may want to note the original date and user who added the class on the duplicate record in the **Comments** column of the Schedule Changes screen.
Status Log	Applicant/Student in *Admissions Office* and *Registrar's Office*	Any entries on duplicate but not on primary are added (only when application or enrollment is added).
Course Requests	Student in *Registrar's Office*	Any entries on duplicate but not on primary are added.

Information	Record Type	What happens?
Schedule	Student and Faculty/Staff in *Registrar's Office*	Any entries on duplicate but not on primary are added.
Grades	Student in *Registrar's Office*	Any entries on duplicate but not on primary are added.
Attendance	Student in *Registrar's Office*	Any entries on duplicate but not on primary are added.
Checklist Items	Applicant in *Admissions Office*	Any entries on duplicate but not on primary are added.
Conduct	Faculty/Staff in *Registrar's Office*	Entries on duplicates are added to primary.
Courses	Faculty/Staff in *Registrar's Office*	Any entries on duplicate but not on primary are added.
Restrictions	Faculty/Staff in *Registrar's Office*	Any entries on duplicate but not on primary are added.
Faculty/staff information for *Faculty Access for the Web*	Faculty/Staff in *Registrar's Office*	Any entries on duplicate but not on primary are added.
Integration links with *Raiser's Edge* records	All records mapped for integration	The link of the primary record is maintained, along with the address and relationship links. However, if a primary record does not have a link, but a duplicate record does, the link from the duplicate is copied to the primary.