Merging Temporary Records

If your district has enabled the creation of temporary student records, your users can, as an emergency measure, add students for testing. (For instructions on enabling this feature, see **Manage System Settings > Manage District-Wide Settings > Enable and Disable Measures** in the online help for Head Admins.)

For example, if a new student enters a teacher's classroom on the day he or she is scheduled to test, the teacher may create a temporary record to add the new student to the teacher's list. When the teacher adds a student, easyCBM creates a temporary student record and generates a temporary student ID (for example, `easycbm_13212`). After testing, you must merge the temporary record with the student's permanent record as loaded into the system in the `2_students.csv` file and the `3_teacher_students.csv` file. (See the *Creating and Uploading Data Files Quick Start Guide* or the About Data Files section of the online help for Administrators at http://downloads.hmlt.hmco.com/Help/easyCBM/Admin/index.htm). This results in a single, complete, permanent student record containing the recent test result(s) and amounting to the use of a single license.

Important: Each temporary record uses one separate student license until it is merged with the actual student record created by the roster (`.csv`) file.

To merge a temporary record with a permanent student record:

1. From the **Admin** tab, click **Student Records**. The **Student Records** page appears.

2. Click **Show Teacher-Added Records**. The **Teacher Added Students** page appears with a list of all temporary student records.

3. Open the student's record using one of the following methods:
   - In the **Student ID** column, click a student ID. The **Student Record** page appears for that student ID.
   - In the **Last Name** column, click **(search)** next to a student's last name. The **Student Record** page appears with matching last names. In the **Student ID** column, click the student ID. The **Student Record** page appears for that student.
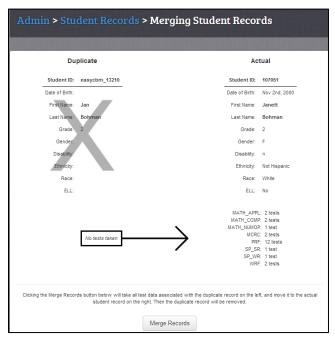
> **Note:** The Last Name search returns all records for a student. You can use it to determine 1) if a student has been uploaded to the CBM system through the csv file and 2) What that student's permanent ID is so that you can enter it for this procedure. If the student has not been uploaded yet, you will need to add the student to the `2_students.csv` file and re-upload that file before merging. See the *Creating and Uploading Data Files Quick Start Guide* or the About Data Files section of the online help for Administrators (http://downloads.hmlt.hmco.com/Help/easyCBM/Admin/index.htm).

4. Scroll down to the **Merge Student Record** heading, and in the **Actual Student ID** box, type the student's ID as it appears for the `StudentID` field in the data files `2_students.csv` and `3_teacher_students.csv` (for example, 107051), **not** the easyCBM system-generated temporary student ID (for example, easyCBM_13210).

5. Click **Preview Merge**. The **Merging Student Records** page appears.

6. Review the preview.
   - If no corrections are required, then continue to step 7.
   - If corrections are required, click the **Admin** tab to cancel the action, and follow the online help instructions for **Editing an Existing Individual Student Record** (found in **Manage Student Records > Work with Existing Student Records**). Repeat this procedure.

7. Click **Merge Records**. The originally selected record is deleted and all tests are moved to the record specified by the ID number. A confirmation message informs you that the student's record has been successfully merged.