

## MERGE BATCH INFORMATION FOR LEA'S

**PURPOSE:** The merge batch option is a system feature that allows districts to update any number of student-level collection records without replacing an entire data batch.

### What does this mean to my district?

- **EXAMPLE:** If your district realizes a grade was omitted from a collection batch, you can upload a batch only containing the omitted records and merge it with data already submitted.
- Individual schools can upload their own batches. In addition, special student populations can be uploaded as a batch (such as outplaced students).
- Mass corrections can be made without submitting a district wide batch. For example, if all students were marked as "Not Eligible" in the Eligible for Free/Reduced Price Meals field, a batch containing records of only those eligible for free and reduced lunch can be uploaded and the appropriate records will be updated. The remaining records will not be overwritten.

### Has the application security changed? How can I obtain a password for each of my schools?

It is very important to note that the security of the application has not changed, and there is only one username and password per district for collection. Keep in mind that there is only one level of access tied to the application credentials – everyone with the password has access to add, edit and delete records for the entire district. For example, if your district's password is shared with each of your three schools, School A has the ability to add, edit, or delete records that schools B and C have entered. Ensure that if you share the password with multiple users they have a full understanding of this, and are instructed to work with only the records that they are authorized to.

### What are my options when I upload a batch?

On the collection Batch Upload screen there is an option to Replace or Merge the batch you wish to upload.

- Replace Batch will completely delete all records that were previously uploaded by batch and replace them with the new batch that is uploaded.
- Merge Batch will check each SASID in the new batch against the Collection **Master Database**.
  - If the SASID has already been reported it will be deleted and replaced with the record in the Merge Batch.
  - If the SASID has not yet been reported it will be added.

Records cannot be deleted using the Merge Batch option.

**Master Database** – The table where all of the error free collection records are stored. If data is entered manually it is immediately stored in the Master Database. If data is uploaded in a batch the data is transferred to the Master Database only if there are no errors in the batch. Transfers occur every fifteen minutes between 7:00 a.m. - 7:00 p.m.

### How do I get to this screen?

1. Log onto PSIS
2. Select Collection
3. Select the appropriate collection
4. Select Batch Upload from the left-hand menu

**Can I send a Merge Batch containing only the SASID and the field that needs to be updated?**

No. Your batch must follow the PSIS collection format and include all required fields, even if only one field is being updated. All fields in a Merge Batch will go through the same error checks as a Replace batch.

**What if my Merge Batch has errors in it, or I decide I would rather make my changes manually after an unsuccessful Merge upload?**

Records that are already in the Master Database can be updated manually as long as your last collection batch was successful and is in the Master Database. If there were new records in your unsuccessful Merge Batch you may enter them manually as long as your last collection batch was successful and is in the Master Database. An unsuccessful Merge Batch will not prevent manual changes.

**Do I have to use the Merge Batch feature if I want to update select records? Can I update the records manually instead?**

You do not have to use the Merge Batch feature if you do not want to. You can resubmit your entire batch and select Replace Batch if you prefer.

**What are the rules pertaining to records that were originally entered manually?**

If a record is initially entered via Individual Entry it will not be replaced by a Replace Batch. The record can be updated with a Merge Batch.

**Can I use a Merge Batch for outplaced students if my collection was submitted using SIF?**

Yes, you can submit your student information records using SIF and then log into PSIS and upload a separate .csv or fixed length file with just your outplaced students using Merge Batch.