Common Matching

Overview of Common Matching
Common Matching is a process that helps with the creation and management of basic person records. Basic person is a generic term that refers to people (persons) and companies (non-persons). Basic person information includes:

- Name/ID
- Address
- Telephone
- E-mail
- Biographical information

The Common Matching process checks for existing identification records before a new one is added to the database. Common Matching also provides a mechanism to add new records to the Banner database and update existing ones. The Common Matching process is used for direct data entry [online matching] and may be used for batch processing.

Note: Only users who have permission to create new records in Banner (insert access into the SPRIDEN table) can use Common Matching.

Note: The following data entry forms used by USNH will use Common Matching:

- Agency Code Maintenance Form [FTMAGCY]
- Financial Manager Maintenance Form [FTMFMR]
- Identification Form [PPAIDEN]
- Vendor Maintenance Form [FTMVEND]

About Common Matching
Common Matching uses an algorithm and rules defined by USNH to determine which Banner records might be a duplicate of the one being entered.

There are three possible results:

1. The record is new.
No match has been found in the database. The record can be created without any additional processing, and Banner will assign a new PIDM to it. Banner uses the new Basic Person APIs to add the information to the database. Users do not need to enter the information again.

2. A match is found for the record.
Common Matching has found one, and only one, Banner record that matches the record based on the rules. The record appears on the Match tab of GOAMTCH. The user must review the displayed data to see if the matched Banner record is the same as the one they are trying to enter.

3. The new record gets a status of suspense because a potential match is found.
Common Matching has found at least one record where some of the fields identified in the rule match the record being entered, but not all. Potential Matches appear on the Potential Matches tab of GOAMTCH. The number of potential matches found appears on the tab. The potential matches are listed in order by rule set, but can be sorted using the arrows above the ID or Name columns.
Users should review each potential match to determine if one is, in fact, a match.

**Using Online Common Matching**

GOAMTCH can be accessed directly or is automatically called (if Common Matching has been enabled) when:

- A user enters an ID that does not already exist when using FTMAGCY, FTMFMGR, PPAIDEN, or FTMVEND

**Note:** You cannot bypass the Common Matching process; if you do not select any of the options available after initiating the search for matches, you will not be able to perform a Next Block function to enter any data upon return to the original form.

- A user selects Common Matching (GOAMTCH) from the Options menu from a form where IDs are created (FTMAGCY, FTMFMGR, PPAIDEN, or FTMVEND)
If you access GOAMTCH via another form [e.g. PPAIDEN], the name of the form from which you came will be displayed in the Title Bar.

If you access GOAMTCH directly, only GOAMTCH will appear in the Title Bar.

**Match Tab**
One record matches the data you entered exactly. The record does exist in the database, based on the rules associated with that Matching Source. The information on the matched record appears on the Match tab on GOAMTCH.

**Potential Matches (1) Tab**
Based on the rules for the Matching Source, more than one record matches the data you entered, or there are multiple records where some of the information is matched, but not all of it. For example, it could be that the first name, last name, and address you entered exist in the database but the date of birth is different, or that two records with the same first name, last name, address and date of birth are found. The choices are listed on the Potential Matches tab on GOAMTCH.

*Note:* The potential matches can be sorted dynamically by ID or name in ascending or descending order using the Sort up and down arrow buttons for the ID and Name fields. The default sort order is by ID and priority (in descending order).

**Results**

<table>
<thead>
<tr>
<th>ID</th>
<th>Identification number of the potential match.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name associated with the ID.</td>
</tr>
<tr>
<td></td>
<td>If an asterisk (*) appears next to the name, the match occurred on the alternate name and the alternate name is the one that is displayed.</td>
</tr>
<tr>
<td>SSN/ SIN/ TIN</td>
<td>SSN/SIN/TIN of the potential match from the Banner database.</td>
</tr>
<tr>
<td>Birth Date</td>
<td>Birth date of the potential match from the Banner database.</td>
</tr>
<tr>
<td>Gender</td>
<td>Gender of the potential match from the Banner database.</td>
</tr>
</tbody>
</table>

**Matched or Hierarchical Address**

Address of the potential match from the Banner database. The address is displayed if any address fields were part of the rule and a match was found.

An asterisk (*) next to an address indicates that it is inactive.

**Telephone**
Telephone number of the potential match from the Banner database. The telephone number is displayed if any telephone fields were part of the rule and a match was found.
E-mail

E-mail address of the potential match from the Banner database. The e-mail address is displayed if any e-mail fields were part of the rule and a match was found.

All Addresses

Pull-down list of all the addresses for the highlighted PIDM. The address type, street line 1, city, state, and ZIP code are displayed for each address, and assist in determining if a potential match is actually a match.

An asterisk (*) next to an address indicates that it is inactive.

All Telephones

Pull-down list of all the telephone numbers for the highlighted PIDM. The telephone type and telephone number are displayed to assist in determining if a potential match is actually a match.

An asterisk (*) next to a telephone number indicates that it is inactive.

All E-mails

Pull-down list of all the e-mail addresses for the highlighted PIDM. The e-mail type and e-mail address are displayed to assist in determining if a potential match is actually a match.

An asterisk (*) next to an e-mail address indicates that it is inactive.

**Common Matching Entry form [GOAMTCH] Buttons**

- **Duplicate Check** - Select this button if you want to trigger the Common Matching process without performing a Next Block function.

- **Details** - Select this button if Common Matching has found potential matches and you need to do additional research to see if any of them match the record you’re adding. A list of forms will appear, and you can select one to access it.
• **View Comments** - button can be used to view non-technical details about the matching source and related rule sets from GTVCMSC to better understand the type of data that should be entered in GOAMTCH and the matching results that are produced. This button is also available from the Matches and the Potential Matches blocks.

<table>
<thead>
<tr>
<th>Rule Set</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Element=SSN/SIN/TIN, Length=9, Match on NULL Data=No;</td>
<td></td>
</tr>
<tr>
<td>Element=First Name, Length=5, Match on NULL Data=Yes;</td>
<td></td>
</tr>
<tr>
<td>Element=Last Name/Non-Person Name, Length=10, Match on NULL Data=No;</td>
<td></td>
</tr>
</tbody>
</table>

• **Select ID** - Select this button if Common Matching has found an existing record that is a match for the one you are entering. This populates the form on which you were entering data with the existing Banner data for that person or non-person. You are automatically taken back to the original form and a new PIDM is not added to the database.

• **Update ID** - At USNH we are NOT using this function with PPAIDEN.

• **Create New** - Select this button if the Common Matching process does not return a record that matches the one you are entering, or if none of the potential matches that was returned matches the record you are entering. This creates a new PIDM in Banner. If biographical data, e-mail address, telephone number, or complete address information has been entered, the corresponding records will created.

If you are using a matching source code that is defined to be used for non-persons, if you try to enter any biographical information (e.g., birth date, gender, etc.), you will receive a warning message.

The **Clear and Return to Data Entry** button appears after you have run common matching. This button will clear out the information in the resulting fields. You can also use If you have a large number of potential matches, you may want to select this button to erase the information on the window and enter more restrictive criteria in the Data Entry block. You can enter additional information to reduce the number of potential matches the Common Matching process finds. To see the new list of potential matches, you must execute the process again by performing a Next Block function or selecting the Duplicate Check icon.
Locating a Person Record in PPAIDEN
At USNH we will only be using the GOAMTCH form to identify matches and potential matches. We will not be using GOAMTCH to update existing records.

Wildcards and Special Characters
You can use this form to search for identification records, and you SHOULD NOT use wildcard characters (%). You can enter partial information without using a wildcard character.

The programming logic treats searching and creating data differently:

• If you enter % in the First Name field, for example, and create a new record, % will be stored as the person’s first name.

• If you use a wildcard to search for a record, the Common Matching process will strip it out. The process removes special characters and forces the data to be uppercase.

For example, if you search for JON%S, the Common Matching process will search for JONS, and JONES will not be considered a match.

Query Using Common Matching & SSN ONLY:
1. Access PPAIDEN. You can also enter records on GOAMTCH itself.

2. Enter the ID #

3. Perform a Next Item [TAB] or Next Block function. If the ID # does not already exist within the database GOAMTCH will appear automatically. The ID you entered will remain in the ID field.

4. When entering a new person in PPAIDEN the Matching Source must be HR_PPAIDEN_ONLINE.

   If HR_PPAIDEN_ONLINE was defined as your default Matching Source code for your user ID on the Common Matching User Setup Form (GORCMUS), it automatically appears in the Matching Source field on GOAMTCH.

   If HR_PPAIDEN_ONLINE is not displayed in the Matching Source code field, select it from the list of values in the Matching Source field.

   Multiple matching sources may be available if the Allow Other Matching Sources checkbox is selected for your user ID on GORCMUS.

5. Perform a Next Block function.

6. Enter the person’s SSN in the SSN/SIN/TIN: fields. This information will be used to check for a match.

7. Select the Duplicate Check icon or perform a Next Block function to initiate the Common Matching process.
Banner will run the Matching algorithm and process the rules associated with the chosen Matching Source. According to the algorithm and the rules, the system will display a Match or Potential Matches, or indicate that the record is considered New. There are three possible outcomes:

(a) **New** - The record does not exist in the database, based on the rules associated with that Matching Source. A pop-up window will appear, asking you if you want to create the record.

![No matches found, create as new?](image)

You can select Yes to create the new record, or you can select No and then click on the **Create New** icon. **At this time DO NOT create a new record until after you complete a query Using Common Matching & Name Information.**

(b) **Match** - One record matches the data you entered exactly. The record does exist in the database, based on the rules associated with that Matching Source. The information on the matched record appears on the Match tab on GOAMTCH.

Select the **Select ID** icon to bring the information on the matched record back to the form where you started [PPAIDEN].

**Note:** At USNH in order to have a Match when using Common Matching and PPAIDEN the person's Last Name, First Name, SSN and Birth Date would have to be entered completely and accurately.

(c) **Potential Matches** - Based on the rules for the Matching Source, more than one record matches the data you entered, or there are multiple records where some of the information is matched, but not all of it. For example, it could be that the first name, last name, and address you entered exist in the database but the date of birth is different, or that two records with the same first name, last name, address and date of birth are found. The choices are listed on the Potential Matches tab on GOAMTCH.

**Note:** The potential matches can be sorted dynamically by ID or name in ascending or descending order using the Sort up and down arrow buttons for the ID and Name fields. The default sort order is by ID and priority (in descending order).

Select the **Details** icon to see a list of forms (Identification Form [PPAIDEN], Employee Form [PEAEMPL]) that may be helpful in determining if the highlighted record is a match for the one you’re entering. Select the form name from the list to access the form.

*If one of the potential matches...*

is the same as the record you’re adding, select **Select ID** as described above for the highlighted record on the Potential Matches tab. This will bring the information on this record back to the form where you started [PPAIDEN].
If the record you’re adding is not listed...
(i.e. none of the potential matches are the same as the record you are creating), you could select the Create New icon to create a new PPAIDEN record in Banner. At this time DO NOT create a new record until after you complete a query Using Common Matching & Name Information.

Query Using Common Matching with Name [NO SSN]:

1. Access PPAIDEN. You can also enter records on GOAMTCH itself.

2. Enter the ID #

3. Perform a Next Item [TAB] or Next Block function. If the ID # does not already exist within the database GOAMTCH will appear automatically. The ID you entered will remain in the ID field.

4. When entering a new person in PPAIDEN the Matching Source must be HR_PPAIDEN_ONLINE.

   If HR_PPAIDEN_ONLINE was defined as your default Matching Source code for your user ID on the Common Matching User Setup Form (GORCMUS), it automatically appears in the Matching Source field on GOAMTCH.

   If HR_PPAIDEN_ONLINE is not displayed in the Matching Source code field, select it from the list of values in the Matching Source field.

   Multiple matching sources may be available if the Allow Other Matching Sources checkbox is selected for your user ID on GORCMUS.

5. Perform a Next Block function.

6. Enter as much of the person’s last name that you know to be accurate in the Last Name: field. This information will be used to check for a match.

7. Enter the first letter of the person’s first name in the First Name: field. This information will be used to check for a match.

7. Select the Duplicate Check icon or perform a Next Block function to initiate the Common Matching process.

Banner will run the Matching algorithm and process the rules associated with the chosen Matching Source. According to the algorithm and the rules, the system will display a Match or Potential Matches, or indicate that the record is considered New. There are three possible outcomes:

(a) **New** - The record does not exist in the database, based on the rules associated with that Matching Source. A pop-up window will appear, asking you if you want to create the record.
You can select Yes to create the new record, or you can select No and then click on the Create New icon. At this time if you have already completed a query Using Common Matching & SSN ONLY and have not located a match you may create a new record.

(b) **Match** - One record matches the data you entered exactly. The record does exist in the database, based on the rules associated with that Matching Source. The information on the matched record appears on the Match tab on GOAMTCH.

Select the Select ID icon to bring the information on the matched record back to the form where you started [PPAIDEN].

**Note:** At USNH in order to have a Match when using Common Matching and PPAIDEN the person's Last Name, First Name, SSN and Birth Date would have to be entered completely and accurately.

(c) **Potential Matches** - Based on the rules for the Matching Source, more than one record matches the data you entered, or there are multiple records where some of the information is matched, but not all of it. For example, it could be that the first name, last name, and address you entered exist in the database but the date of birth is different, or that two records with the same first name, last name, address and date of birth are found. The choices are listed on the Potential Matches tab on GOAMTCH.

**Note:** The potential matches can be sorted dynamically by ID or name in ascending or descending order. The default sort order is by ID and priority (in descending order).

Select the Details icon to see a list of forms that may be helpful in determining if the highlighted record is a match for the one you're entering (Identification Form [PPAIDEN], Employee Form [PEAEMPL]). Select the form name from the list to access the form.

*To further reduce your results...*

Use the person's complete First Name and/or complete Birth Date.

*If one of the potential matches...*

is the same as the record you're adding, select Select ID as described above for the highlighted record on the Potential Matches tab. This will bring the information on this record back to the form where you started [PPAIDEN].

*If the record you're adding is not listed...*

(i.e. none of the potential matches are the same as the record you are creating), select the Create New icon to create a new PPAIDEN record in Banner. At this time if you have already completed a query Using Common Matching & SSN ONLY and have not located a match you may create a new record.