Overview

The new Common Matching Entry Form (GOAMTCH) allows you to determine whether a person/non-person matches an existing record before it is entered into the database.

Common Matching greatly reduces, and helps in the prevention of, the creation of duplicate records when person/non-person is added to Banner.

Common Matching can still create duplicates or have a person matched to another person’s identity record. Care and thorough research is still needed.

After performing a thorough name search using the existing search functions in Banner, this form (GOAMTCH) is called automatically from the Key Block of your modules data entry form when the generate ID button is selected.

When the Common Matching form appears select the appropriate Matching Source for your module. This will need to be selected only the first time you use the form. Enter the name and any other information determined by your module in the Data Entry block. The data entered will be used to assist with matching and then this data will be stored in Banner, if the person is found to be new.

Note: If a matching record exists, users have the option to enhance existing data by inserting new information. Existing data will not be overwritten.
Matching Status

There are three possible results of running the Common Matching process:

- **NO Match**
  - If no records are found to match the rules, a status of **New** is returned. This enables you to create a new person record with the data entered.

- **MATCH (ID IS THE PERSON)**
  - **NOTE:** You must have entered at least a Name, SSN, Gender and Birth Date for this rule to be reliable
  - If one and only one record matches the rules, a status of **Match** is returned and the Match tab will be highlighted. Data for the matched person will be returned for review.

- **POTENTIAL MATCH**
  - A status of **Potential Match** occurs if some fields match but not all, or if multiple records match exactly. For example, a potential match would occur if first name and last name match but DOB doesn’t match. When potential matches exist, the Potential Matches tab will be highlighted with the number of potential matches and the records which were identified will be listed for review.
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).

When you click on the Sort up arrow, the sort organizes the results in alpha order (A - Z). When you click on the Sort down arrow, the sort organizes the results in reverse alpha order (Z - A).

Once you have clicked on an up or down arrow, you can mouse over the arrow to see the tool switch hint message, click on the arrow again, reverse its direction, and perform a new sort. For example, after you have sorted on ID or name in A - Z order (using the Sort up arrow), you can then click on the arrow again to change it to a Sort down arrow, and resort the data in Z - A 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. Select the form name from the list to access the form.

Follow these steps to use the Common Matching Process

1. Go to your modules data entry form
   - General Person Identification Form (SPAIDEN)
   - Advancement Identification Form (APAIDEN)
   - Identification Form (PPAIDEN)
   - Personal Identification – Finance Form (FOAIDEN)
   - Vendor Maintenance Form (FTMVEND)
   - Agency Code Maintenance Form (FTMAGCY)
   - One-Time Payment Form (PEA1PAY)
   - Quick Entry Form (SAAQUIK)
   - Quick Recruit Form (SRAQUIK)

2. If the person does not have an ID, and a name search has already been done, click on the GENERATE ID icon and the GOAMTCH form will appear.

3. Once the GOAMTCH screen appears, ID will automatically populate to GENERATED. You will need to select the Matching Source from the dropdown.
Matching Sources:

- **Adv Person** or **Adv Nonperson** – Advancement
- **EDE** – Financial Aid (Tape Load)
- **EPAF** – Human Resources
- **Finaid** – Financial Aid
- **Flexreg** - CPCE
- **Student Admissions** – The following admissions
  - Undergraduate & Graduate Studies
  - PharmD
  - Dental
  - Law
- **SAT/GRE** - Admissions Tape Load
- **Student Registrar** – Registrar
- **Vendor-Non-Person** or **Vendor-Person** – Purchasing/Sponsored Programs

4. Perform the **Next Block** function

5. Enter all available person/non-person data to be stored in Banner as if you were entering it in your modules data entry form. The search is not case sensitive and you may use one wild card (%) preceded by a letter per field. The search criteria will need to be corrected PRIOR to adding as a new record.
   - Reminder the ZIP field will automatically populate the City, County and State if you enter it first and Tab.
   - **NOTE:** The information entered in the Data Entry block will be used for creating a new record and may be used for updating an existing record. Data Entry standards are important.

6. Click on the **Duplicate Check** icon. There will be three possible results:
   - **NEW** – See step 7
   - **MATCH** – See step 8
   - **POTENTIAL MATCH** – See step 9

7. If No Matches Found (**NEW**), click on **Yes** in order to create a new person with the above entered data in your data entry form for your module.
   - **NOTE:** Do Not click **NO**, if you do go back to Step 6
   - You will then be taken back to your modules data entry form and you will have to enter any additional information.

8. If an exact Match is found (**MATCH**), the person and their data will display in the **Match** tab.
   - You must have entered at least a Name, Address (State/ZIP) and Birth Date for this rule to be reliable. Otherwise, you should look into the person more to make sure it truly is a Match.
• **NOTE:** Banner will not overwrite a field which is already populated. Clicking Update ID will update the following data if it has been entered in the Data Entry Block:
  - SSN/SIN/TIN if it is null in Banner
  - Date of Birth if it is null in Banner
  - Gender if it is unknown in Banner
  - Telephone and email if it did not exist for the record.
  - A new sequence for the address will be created if the same type exists but address information is different.

  - Then click **OK** on the acknowledgement message for Biographical, etc. and you will then be taken back to your original data entry form where you can continue your data entry.

9. The **Potential Match** tab will only be available if some fields match but not all, or if multiple records match exactly.
   - Review the data for each potential match. You can also click the **Details** button to view data about the highlighted person on your data entry form.

   - Determine if the person is **NEW** or a **MATCH** and select the appropriate icons below:
     - **Create New** and go to Step 7
     - To **Match** a student choose either:
       - **Select ID** – Selects the ID of the highlighted person and carries it back to the key block of the original data entry form in order to continue data entry.
         - **Note:** Any usage of Common Matching for checking Suspense records for any tape load process MUST use the **Select ID** to process matches.
       - **Update ID** – Updates the record with data from the top block as per Step 8

*It is suggested that you not use GOAMTCH to change addresses on existing records.*