



University of Illinois

Common Matching Banner 7.3

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COMMON MATCHING (GOAMTCH)

Overview

Common Matching (CM) is a person search/match process in Banner that helps prevent the creation of duplicate or incorrectly merged person records. Common Matching is used in both batch and online processing. It uses a predefined source containing a set of matching rules that analyzes person-related data supplied in the batch process or input on the GOAMTCH form by the online user. Common Matching does not replace existing person search methodology, but enhances it by providing a “final” check before a person record is created or merged with an existing person record. Users must continue to perform a thorough person search using the Extended Search window, GUIALTI, SOAIDEN, GUASYST, etc.

The online portion of the Common Matching process is initiated when the user begins creation of a new general person record. After clicking the Generate ID button, the **Common Matching Entry** form (**GOAMTCH**) will open and all person related data is entered there.

Once all of the pertinent data is entered, the process evaluates the information supplied and determines whether a potential person match exists in Banner. One of the following Match Statuses will be returned:

- **Potentially Matched Record** - a list of people who match some, but not all criteria in the matching rules, or there is more than one exact match.
- **Matched Record – one and only one match** based on the matching rule criteria.
- **Create New Record** - no records match; create a new person record.

The user reviews the results and makes the decision whether to create a new person record or merge with one of the potential match records returned in the results section of GOAMTCH.

In the batch processes, CM runs “behind the scenes” and makes the match decision automatically. It will create a new person record, merge to an existing person record or suspend the record if it cannot determine if a duplicate record already exists. GOAMTCH is used to complete the person match portion when resolving suspended batch records.

Features

- Common Matching is able to search for matches on name fields that may be longer than the name inputted. Example – input Sam; Sam, Samuel, Samantha and Samson would be returned as potential matches.
- CM has the ability to translate a first name nickname if it is specified in the GORNAME (Name/Alias) table. Example – input Mike; Mike and Michael would be returned as potential matches.
- CM has the ability to evaluate the Day/Month/Year portions of birth date independently of each other. This can be helpful if the recruit/applicant has created a typo or transposed their birth month and day – month and day would not match, but year would still be shown as a match.

Forms Using Common Matching

GOAMTCH is used with the following forms:

- General Person Identification (SPAIDEN)
- Advancement Identification (APAIDEN)
- Quick Recruit (SRAQUIK)
- Quick Admit (SAAQUIK)
- Electronic Prospect Inquiry (SRIPREL) – as part of Options > Match
- Electronic Application Process (SAEAPPS) - as part of Options > Associate Person with ID

Navigating in GOAMTCH

GOAMTCH is divided into three data blocks described below.

(Figure 1 – GOAMTCH Form)

1. Key Block:

- **ID – GENERATED:** indicates the creation of a new person
- **Generate ID** – this icon button will be disabled if the Generate ID button is clicked from another form, e.g. SPAIDEN, SAAQUIK, etc.
- **Matching Source:** set of matching rules. The default matching source for the user will be displayed. Depending on your security profile you may be able to select a different matching source from the Matching Source Code list.
- **View Comments** – this icon button will open a comments window that displays information about the matching source.

2. Data Entry Block:

- Enter all pertinent data in this *Block*. The *Data Entry Block* will auto-populate if GOAMTCH is opened from SRIPREL or SAAEAPS.
- Action icon/buttons – refer to Figure 2 for a description.
- The default types for Address and Telephone = Mailing, E-mail = Personal

3. Match Results Block:

- **Match Tab** is populated if there is **one and only one match** based on the matching rule criteria.
- **Potential Match Tab** displays anyone who has at least a **first and last name match** and a partial match of all other data based on the rule criteria, or a match on SSN.

- **All Addresses** displays all active and inactive addresses for potential match records.
- **All Telephones** displays all active and inactive telephone numbers for potential match records.
- **All E-mails** displays all active and inactive e-mail addresses for potential match records.
- **Match Results** indicates segments of data that did or did not match the search rule.
- **Matching Rule Sets** displays the match rule number and results for the applicable matching rule.
- **Match Priority** indicates the number of the matching rule associated with the potential match.

The icon buttons in the Data Entry block include **Duplicate Check**, **Select ID**, **Details**, **Update ID**, **View Comments**, and **Create New**.



(Figure 2 – Data Entry block Icons)

Duplicate Check:

Use this icon button to initiate the Common Matching search/match process.

Select ID:

Use this icon button if Common Matching returned either an exact match or the user determines that one of the potential matches is an appropriate match. **Note:** address, telephone, email or biographical updates will **NOT** be saved when using Select ID. The user will have to navigate to the appropriate form to enter the updates. The record will be merged and you will be returned to the form where the ID creation process began.

Details:

Select this icon button if Common Matching returned potential matches, however additional research needs to be performed to determine if any results match the record. The Additional Information Options window will open with a list of forms that can be directly accessed. Closing the form after completing research will return the user to GOAMTCH.

Update ID:

Select this icon button when the user determines that a potential match is a correct match to the person input in the Data Entry Block, but some of the data needs to be updated. Update ID will merge with the existing record but will add new address, telephone and e-mail records, but will not update biographical information. However,

if the SSN or DOB were not supplied on the original record and is input on GOAMTCH, it will be entered on the appropriate forms.

View Comments:

Select this icon button to view comments and information related to the Rule Sets within the Matching Source.

Create New:

Use this icon button if the record input by the user in the Data Entry block does not match any of the potential match records. A new General Person record will be created in Banner. All biographical data, email address, mailing address and telephone number information that has been entered in the *Data Entry Block*, will be saved in Banner and will display on the appropriate forms.

Accessing and Using GOAMTCH

1. Always perform a thorough person search before creating a new person record.
2. If you are unable to find a person match in Banner, initiate the person creation process from SPAIDEN, SAAQUIK, SRAQUIK, etc. The user will be returned to the initial form once the person record is created.
3. Click the **Generate ID** icon button; the GOAMTCH form will open.
4. A default Matching Source will display in the *Key Block*. (Choose a Matching Source if one has not been assigned.)
5. Select Next Block or click the Last Name field to begin entering data in GOAMTCH.

(Figure 3 – GOAMTCH Form)

6. Enter all available person information in the *Data Entry Block* fields.

Note: Input as much data as possible before initiating the match process. The match rules look at multiple pieces of data entered in the *Data Entry Block* in order to determine if there is a partial or exact match.

Tips:

- Entering the **Zip Code** will auto-populate the City, State, County (County only if Illinois zip)
 - **Birth Date** is in DD/MM/YYYY sequence
 - **Non-Person Name** – disregard, not used when creating a person record.
7. Click the **Duplicate Check** icon button to start the match process.
 8. **Note:** If you are performing a person match as part of resolving suspended recruit, test score or admissions applications from one of the batch jobs, GOAMTCH will auto-populate with the data supplied by the source. Click the **Duplicate Check** button and review the potential matches.

Interpreting the Match Results

The **Match Results Block** will populate if any potential or exact matches are found (based on the matching rules).

Match

1. If an exact match is found, the **Match Tab** is populated.
2. Verify the match results and determine if any of the **potential matches** are possible candidates.
3. Use the **Select ID** icon button on the Match Tab to merge with the record information already existing in Banner (see figure 5). This will select the person, but not update the address, phone or e-mail address and then return to the initial form.
4. Use the **Update ID** icon button to merge with the existing record and update any address, phone or e-mail address information if different from that already in Banner (see Figure 6).

The screenshot shows the 'Common Matching Entry GOAMTCH 7.3' application window. At the top, the ID is 'GENERATED' and the Matching Source is 'STUMTCH1'. The 'Data Entry' section contains fields for Last Name (Toms), First Name (David), Middle Name, Address Type (MA), Street Line 1 (1234 State St), City (Arlington Heights), State or Province (IL), ZIP or Postal Code (60005), County (Cook), and Nation. It also includes fields for Non-Person Name, SSN/SIN/TIN (366500000), Birth Date (06-MAR-1979), Gender (Male), Telephone Type (MA), Telephone (847-2551467), E-mail Type (PERS), and E-mail (dt@hotmail.com). Below the data entry is a 'Match' tab and a 'Potential Matches (2)' table. The table has columns for ID, Name, Matched Address, Telephone, and E-mail. The first row shows ID 674324380, Name David Toms, and E-mail PERS=dt@hotmail.cc. Below the table are buttons for 'Duplicate Check', 'Details', 'View Comments', 'Select ID', 'Update ID', and 'Create New'. A callout box points to the 'Select ID' button with the text: 'Click Select ID to merge input record with existing Banner record.' At the bottom, there are 'Matching Rule Sets' listed as 1=Name Match, SSN/SIN/TIN Missing, Birth Day Match, Birth Month Match, Birth Year Match and 2=Name Match, SSN/SIN/TIN NULL Match, Birth Day Match, Birth Month Match, Birth Year Match, E-mail Match.

(Figure 5 – Match Results)

Common Matching Entry GOAMTCH 7.3 [MC:1.0] (BANDEV) (2UIC) View Comments

ID: GENERATED Matching Source: STUMTCH1 Student Common Matching Source

Data Entry

Last Name: Toms Non-Person Name:

First Name: David SSN/SIN/TIN:

Middle Name:

Address Type: MA Mailing Address Birth Date: Day: 06 Month: 03 Year: 1979

Street Line 1: 6742 Western Ave Gender: Male

Street Line 2: Apt 27A Telephone Type: MA Mailing Address Phone

Street Line 3:

City: Chicago Telephone: 773 - 1239876

State or Province: IL Illinois E-mail Type: PERS Personal Email Address

ZIP or Postal Code: 60607 E-mail: dt@hotmail.com

County: 031 County:

Nation:

Match Potential Matches (2)

Duplicate Check Select ID Details Update ID View Comments Create New

ID	Name	Matched Address	Tele	E-mail
674324380	David Toms			PERS=dt@hotmail.co
	SSN/SIN/TIN	Birth Date	Gender	
	366500000	06-MAR-1979	M	

Clear and Return to Data Entry

All Addresses

Matching Rule Sets

1=Name Match, SSN/SIN/TIN Missing, Birth Day Match, Birth Month Match, Birth Year Match
 2=Name Match, SSN/SIN/TIN NULL Match, Birth Day Match, Birth Month Match, Birth Year Match, E-mail Match

Be sure to also review potential matches.

Click Update ID to merge with existing record and update address, phone and e-mail information if different from existing record.

(Figure 6 – Match Results)

Potential Match Results

1. The **Potential Matches Tab** will populate if there is an exact match on First and Last Name, but not an exact match on the additional data supplied (based on the matching rules). The user must now review the potential match results and determine if there is a match to the person entered in the Data Entry block.
2. Clicking on a Potential Match record will highlight it. You can then view all address, telephone and e-mail information for that record.

Displays how the highlighted potential match compares to the input data for each rule. Notice that Birth Day does not match. Could be an input typo or incorrect in Banner?

Click on potential match record to highlight.

Click on arrow to sort name alphabetically.

Scroll to view additional rule match information.

Matching information for Rules 3 and 4.

(Figure 7 – Potential Match Results - Rules 1 & 2)

(Figure 8 – Potential Match Results – Rules 3 & 4)

- To view all addresses for a Potential Match record, highlight the record and open the **All Addresses** drop-down-list.

ID ▲	Name ▼	SSN/SIN/TIN	Birth Date	Gender	Matched or Hierarchical Address	Telephone	E-mail
663908005	Smith, Michael C.	338587631	23-AUG-1961	M	*PR=104 S Adams Philo IL 61864	No Matches	No Matches
667224879	Smith, Michael C.	468627395	24-AUG-1951	M	*PR=4921 S Dorchester Chicago IL 60615	No Matches	No Matches
670815205	Smith, Michael C.	352827230	16-JUL-1989	M	MA=510 N Ashland Park Ridge IL 60068	MA=847 8233934	PERS=MCSOCCER
@01635978	Smith, Michael C.	341526874		N	No Matching or Hierarchical Address found	No Matches	No Matches
@01765219	Smith, Michael C.	349846902	09-JUL-1988	M	MA=510 N Ashland, Park Ridge, IL 60068 MA=510 N Ashland, Park Ridge, IL 60068 PR=510 N Ashland, Park Ridge, IL 60068	MA=773 7798208	No Matches

Clear and Return to Data Entry

Matching Rule Sets

3=Name Match, SSN/SIN/TIN NULL Match, Birth Day No Match, Birth Month Match, Birth Year Match, Phone Match
4=Name Match, SSN/SIN/TIN NULL Match, Birth Day No Match, Birth Month Match, Birth Year Match, Address No Match

(Figure 9 – All Addresses Information)

Click here to view all addresses.

- To view all telephone numbers for a Potential Match record, highlight the record and open the **All Telephones** drop-down-list.

ID ▲	Name ▼	SSN/SIN/TIN	Birth Date	Gender	Matched or Hierarchical Address	Telephone	E-mail
663908005	Smith, Michael C.	338587631	23-AUG-1961	M	*PR=104 S Adams Philo IL 61864	No Matches	No Matches
667224879	Smith, Michael C.	468627395	24-AUG-1951	M	*PR=4921 S Dorchester Chicago IL 60615	No Matches	No Matches
670815205	Smith, Michael C.	352827230	16-JUL-1989	M	MA=510 N Ashland Park Ridge IL 60068	MA=847 8233934	PERS=MCSOCCER
@01635978	Smith, Michael C.	341526874		N	No Matching or Hierarchical Address found	No Matches	No Matches
@01765219	Smith, Michael C.	349846902	09-JUL-1988	M	MA=9246 S Halstead Chicago IL 60620	MA= (847)8233934 MA= (847)8233934 PR= (847)8233934	No Matches

Clear and Return to Data Entry

Matching Rule Sets

3=Name Match, SSN/SIN/TIN NULL Match, Birth Day No Match, Birth Month Match, Birth Year Match, Phone Match
4=Name Match, SSN/SIN/TIN NULL Match, Birth Day No Match, Birth Month Match, Birth Year Match, Address No Match

(Figure 10 – All Telephones Information)

Click here to view all phone numbers.

- To view all email addresses for a Potential Match record, highlight the record and open the **All E-mails** drop-down-list.

ID ▲	Name ▼	SSN/SIN/TIN	Birth Date	Gender	Matched or Hierarchical Address	Telephone	E-mail
663908005	Smith, Michael C.	338587631	23-AUG-1961	M	*PR=104 S Adams Philo IL 61864	No Matches	No Matches
667224879	Smith, Michael C.	468627395	24-AUG-1951	M	*PR=4921 S Dorchester Chicago IL 60615	No Matches	No Matches
670815205	Smith, Michael C.	352827230	16-JUL-1989	M	MA=510 N Ashland Park Ridge IL 60068	MA=847 8233934	PERS=MCSOCCER
@01635978	Smith, Michael C.	341526874		N	No Matching or Hierarchical Address found	No Matches	No Matches
@01765219	Smith, Michael C.	349846902	09-JUL-1988	M	MA=9246 S Halstead Chicago IL 60620		PERS=MCSOCCER5@AOL.COM PERS=Mcsoccer5@aol.com UI=mcsmith3@uiuc.edu

Clear and Return to Data Entry

Matching Rule Sets

1=Name Match, SSN/SIN/TIN Missing, Birth Day No Match, Birth Month Match, Birth Year Match
2=Name Match, SSN/SIN/TIN NULL Match, Birth Day No Match, Birth Month Match, Birth Year Match, E-mail Match

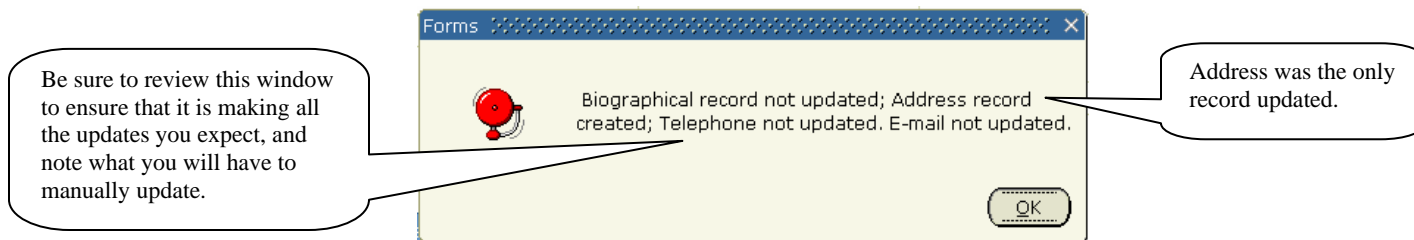
Click here to clear the match results block.

(Figure 11 – All E-mails Information)

Click here to view all e-mail addresses.

- If the highlighted record is the correct person; and address, phone and e-mail information match, click the **Select ID** icon. This will merge the person in the Data Entry block with the person record already existing in Banner and will then return to the initial form. Note: address, telephone or e-mail information **will not** be updated.

- If the highlighted record is the correct person but there is a change in address, telephone number, or e-mail address; click the **Update ID**. The record will merge with the person record already existing in Banner and update any changes to address, phone or e-mail address. A dialogue window will display what information was updated for the existing record.



(Figure 12 – Update Icon – Dialogue information)

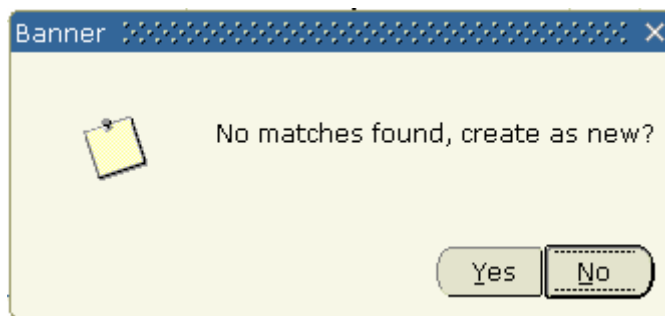
Note: DOB and SSN will never be updated. However, they will be added if the fields were originally blank (null) in Banner.

- Click OK to return to the initial form and enter any additional information that was not updated during the merge, e.g. Permanent Address or Telephone, Emergency Contact, etc.

Note: Your business process may dictate whether the **Select ID** or **Update ID** is used. Example - you may not want to update an address supplied on a test score tape if the address already in Banner was created as part of the admissions application form entry. Or, you may not want to update biographical information if the person is an employee.

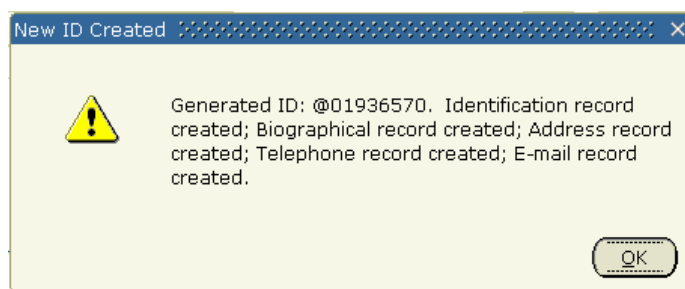
No Suitable Potential Match

- If none of the Potential Match records are a suitable match to the person in the Data Entry block, click the **Create New** icon button to create a new person record. A temporary Banner ID (@ID) will be issued and the General Person forms will populate with data that was input in the *Data Entry Block*. A pop-up window will open describing the types of records that were created.
- Click the Yes button to create the new person record or Cancel to return to GOAMTCH.



(Figure 13 – Create New – Person Information)

3. An informational window displays the type of records created.

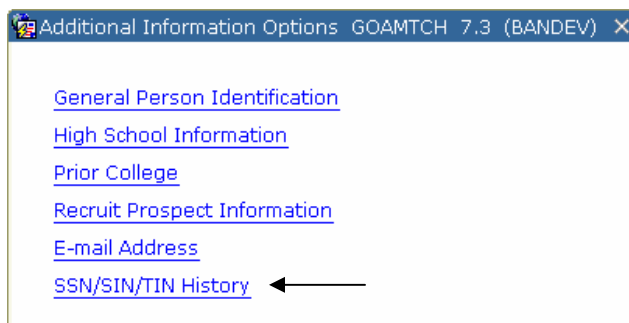


(Figure 14 – Create New – Person Information)

4. Select the OK button and return to the initial form.

Additional Information Option Search

1. If additional information about one of the potential match records is required, highlight the match record and click the **Details** icon button to open the direct link window.



(Figure 15 – Details Icon – Link to additional forms)

2. Select an Additional Information Option. The correlating form will open and can be viewed for additional information. (Example - the SSN/SIN/TIN History (GUITINH) form was selected.)

SSN/SIN/TIN History GUITINH 7.3 (BANDEV) (2UIC)

ID: 662624120 David Toms SSN/SIN/TIN:

Entity Selection				
ID	Entity	Name	Current SSN/SIN/TIN	Birth Date
=> 662624120	P	David Toms	366500000	06-MAR-1979

History				
SSN/SIN/TIN Changed From	SSN/SIN/TIN Changed To	Changed By	Date Changed	Time Changed
36650000	366500000	MNWILSO	09-NOV-2006	14:12:36

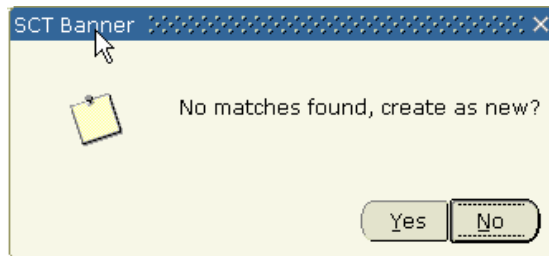
SSN was changed from 36650000 to 366500000.

(Figure 16 – GUITINH SSN/SIN/TIN History)

3. Review the information and click the X button on the toolbar to return back to the GOAMTCH form.

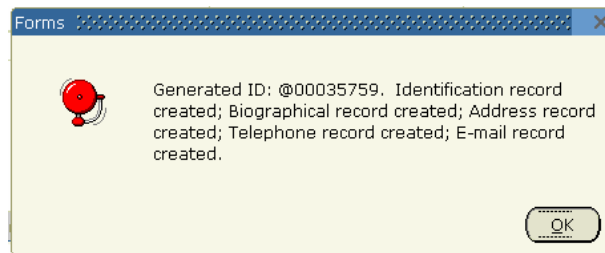
No Potential Match Found

1. If **no** Potential Match records are found in Banner the following pop-up window will display. Click the **Yes** button to create a new general person record (Click No to cancel the process and return to GOAMTCH).



(Figure 17 – Create New)

2. After clicking the Yes button, a pop-up window will open describing the types of records that were created.



(Figure 18 – Create New Person Information)

3. Click the OK button to close and return to the initial form.