USING COMMON MATCHING

Common Matching is a process that helps create and manage person and non-person records to include name/id, address, telephone, e-mail and 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.

Common Matching uses predetermined rules 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. Banner will create a new PIDM and assign a new Banner ID.

2. A match is found for the record. Common Matching has found one, and only one, Banner record that matches based on the rules. The Match tab is highlighted and the user must review the displayed data to see if the Banner record is the same as the one they are trying to enter. If the record found in the database is the same as the one being entered, the user can select the person or non-person as a Match, or update the record with additional information.

3. 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. For example, the first name and last name are the same, the mailing address is the same, but the date of birth is different. GOAMTCH will display Potential matches. The potential matches are listed in order by rule priority. The user can review each potential match to determine if one is a match. If one of the potential matches is the same as the one being entered, the user can select the record as a match or update it with additional information. If none of the potential matches is the same as the one being entered, the user can create a new record.

There are numerous ways to search the database for a person/non-person. It is important that the potential matches are reviewed to determine if one of the matches is the record you are needing to enter.
To create a record or to search for a record, click the **Generate ID:** icon from any of the General Person forms (SPAIDEN, PPAIDEN, APAIDEN, FOAIDEN, FTMVEND).
To search for a person always use the Matching Source, **General Person**. If you have a social security number enter the number and click the **Duplicate Check** icon. If the SSN exists in the system the record will be returned. If this is the correct record click the **Select ID** icon to return to the ..AIDEN form and make any necessary updates to the record.

![Matching Source Selection](image_url)
If the SSN does not exist **DO NOT** create as new! Click No and continue with new search criteria.
There are different ways to search and the following are examples of recommended search methods.

By entering only partial information there are more potential matches. In the example below only last name, first name and a SSN is entered and the Duplicate Check icon is clicked.

Note that the SSN is not exactly the same as the potential match. Probably, this is the same person and it is important to verify which SSN is correct. If the SSN that you are entered in the SSN/SIN/TIN field is correct, click the Select ID icon and make the SSN correction. Also you can view any address to assist in making a correct match.
In this example, the birth date was added as part of the search criteria and the number of potential matches went from 8 to 2. When birth date is added as a search criteria your potential matches will include any null birth dates or any birth dates that can match on either the day or the month or the year.
In this example an address was added as part of the search criteria but note that the potential matches remain at 2. Address information was not built into the rules. The results can vary when the address information is in the source rules causing a potential match to be missed.
In this example note the * beside the name, this indicates that the name is an alternate name. If that record is selected the current name will be returned. An * beside an address indicates the address is inactive.

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>SSN/SIN/TIN</th>
<th>Birth Date</th>
<th>Gender</th>
<th>Matched or Hierarchical Address</th>
<th>Telephone</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>000316036</td>
<td>Byars*, Suzanne J</td>
<td>686862191</td>
<td>F</td>
<td>MA-24 Westhaven Drive Asheville NC 2</td>
<td>No Matches</td>
<td>No Matches</td>
<td></td>
</tr>
</tbody>
</table>

List of All Addresses: includes Street line 1, City, State or Province, and ZIP or Postal Code.
Using the Update ID icon instead on the select icon:

Rules for updating a record that already exists:

- SSN/SIN/TIN can be updated if it is null in the database
- Birth date can be updated if it is null in the database
- Gender can be updated if it is null in the database
- Address, telephone, and e-mail can be updated if the type you entered on GOAMTCH does not already exist for the record. A new sequence number will be created for the address if it already exists in the database with the same type but the address information is different.

Note: If an address record is created and an active address already exists for the same Address Type, the original address will be made inactive.
The **Create New** icon should only be selected when you have exhausted any potential matches. In the example below it is apparent that the record does not already exist in Banner. Also note that the address type to be created is PR.
Results from the Create: Banner ID and Pidm created, bio record and address record created.
The user who created the record and the date always remains with the record so the source can be tracked.