Procedure

Banner Common Matching

Date: January 3, 2013

Purpose: To Establish the procedure to reduce duplicate data entries of person and non-person entities in the Banner Student Information System.

Scope: This policy covers all Otis Banner users who input and/or update data in the Banner Student Information System.

Discussion: Common Matching is a process that creates and manages 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 and Biographical information.

Data entry must be consistent and in compliance with established standards to ensure data integrity, avoid duplication of records and to simplify searches. Entered data must also be accurate and professional in appearance when acted upon by a variety of processes, used for decision-making, reported on and inserted into electronic documents and correspondence. With Common Matching it is very important that standards are adhered to so that the common matching process can work as designed and desired.

The following departments are authorized to generate an ID and create new records.
- Alumni / Donor – Institutional Advancement
- Employee - Human Resources
- Student - Admission Office, Registrar's Office
- Vendor – Purchasing Department, Business Office

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 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, and Banner will assign a new PIDM to it.

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 Common Matching Entry Form (GOAMTCH) appears with the Match tab highlighted. The user <u>must</u> review the displayed data to see if the matched 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, but Banner will not assign a new PIDM.

Note: You can only update fields on an existing Banner record if they are null in the Banner database. If data already exists for those fields, it will not be overwritten.

- If the record found on the database is not the same as the one being entered, the user can create a new record. Banner will assign a new PIDM to the record when it is saved.

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 then appears with Potential Matches tab highlighted. The number of potential matches found appears on the tab. The potential matches are listed in order by rule priority. The user can review each potential match to determine if one is, in fact, a match. If multiple records meet the matching criteria, they are all displayed on the Potential Matches tab.

- 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. Banner will not assign a new PIDM. If the record is updated, existing data will not be overwritten.

- If none of the potential matches is the same as the one being entered, the user can create a new record. Banner will assign a new PIDM to the record.

If the new record does not already exist, the new information will be added to Banner. Users do not need to enter the information again.

Details: Otis College uses a system-generated ID number. The current ID number is a nine-digit randomly assigned number that begins with "X".

Select the appropriate identification form for your module (SPAIDEN – Student Module, PPAIDEN – Human Resources Module, FOAIDEN – Finance Module, and APAIDEN – Advancement Module).

With your cursor in the ID field of the key block, click on the **Generate ID** icon.

ID: [   ] [▼] [   ]   Generate ID: 👤

The GOAMTCH form will open with your cursor in the Matching Source field and the word GENERATED in the ID field. Using the drop down menu for the **Matching Source**, select your departments Matching Source Code.

ID: GENERATED   Matching Source: ***ONLINE_MATCH_RULE [▼]
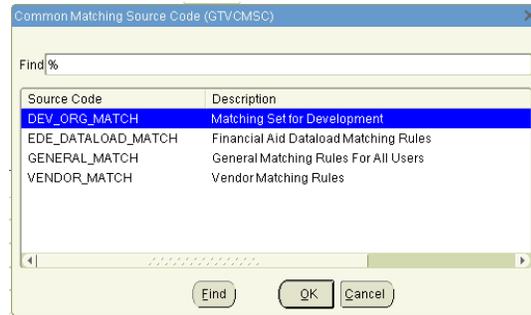
Next, enter the information about the person in the Data Entry window. This information will be used to check for a match. Select the Duplicate Check icon to initiate the Common Matching process.
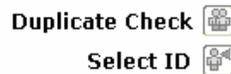
There are three possible outcomes:

1. New - The record does not exist in the database, based on the rules associated with that source code. A pop-up window will appear, asking you if you want to create the record. Select **Yes** or **No**.

2. Match - One record matches the data you entered exactly. The record does exist in the database, based on the Common Matching rules. The information on the matched record appears on the **Match** tab. You can now do one of two things;

   - Click on the **Select ID** icon to bring the information on the matched record back to the form where you started.

   - Select the **Update ID** icon if you entered information in GOAMTCH that should be added to the records in the databases. GOAMTCH will attempt to insert or update records in the SPRADDR (address), SPRTELE (telephone), SPBPERS (biographical), and GOREMAL (e-mail) tables. You will then be returned to the form where you started.

     Note: You can only update fields on an existing Banner record if they are null in the Banner database. If data already exists for those fields, it will not be overwritten.

3. Potential Matches - Based on the rules for that Common 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.

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.

Duplicate Check	Details	View Comments
Select ID	Update ID	Create New

Select the form name from the list to access the form.

If the record you're adding is not listed (none of the potential matches are the same as the record you are creating), select the **Create New** icon to create a new record in Banner. If one of the potential matches is the same as the record you're adding, select the **Select ID** or **Update ID** as described above for the highlighted record on the Potential Matches tab.

Continue entering data on the original form (if needed). You cannot bypass the Common Matching process; if you do not select any of the options after initiating the search for matches, you cannot enter any data after you return to the original form. If the record already exists, it can be updated with information from the new record in the following circumstances and *if the field is null*, but a new PIDM will not be created: SSN/SIN/TIN, Birth Date, Gender, Address, Telephone, and E-mail.

Note: A new sequence number will be created for the address if it already exists in the database with the same type and the address information is different. If an address record is created and an active address already exists for the same Address Type, the original address will be made inactive.

Revisions: January 3, 2013   -   Created