

## ***Policy***

### ***Banner Common Matching***

- Date:** January 3, 2013
- Purpose:** To establish the process to reduce the duplication of records in the Otis College Banner Student Information System.
- Scope:** This policy covers all student workers, faculty, and staff that have Banner accounts for the purpose of inputting and/or modifying data in the Otis College Banner Student Information System at Otis College.
- Discussion:** It is important that no entity be entered into the BANNER database more than once. Before entering information about a person or non-person/vendor, search the database to see if the record already exists. Duplicate records create problems in multiple parts of the system and may take many hours of staff time to locate, merge data, and remove the duplicate record(s).
- Details:** All users, when creating a new person or non-person record, will use the built-in Common Matching process to insure that the new record is not a duplicate. Failure to follow the process outlined in "Procedure – Banner Common Matching" may result in the loss of the users Banner account at a minimum and other actions including up to termination of employment.
- Search first**---before creating a new record. You must query the files using multiple data elements (ex. Name, ID, birth date, etc.) for data already entered before entering a new record. Use the "Alternate ID" as one of the three searches you perform.
- 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 steps for performing a name search differ from module to module, using different forms to look for existing records and others to check address information. In general, attempt to do an ID search, a name search, and an alternate ID search using GUIALT1. The following information applies to all modules:
- **Search by Full ID:** If you have an ID number, search that first. If that brings up any records, verify it is the correct person. Search first by entering the entire ID into the ID field and press enter. If there is a match, the person's name will appear in the name field
  - **Search by Full Name:** If you do not have an ID number or if the ID number search reveals no records, search for the person (or non-person) with their full name as provided, while leaving the ID field blank. Tab to the name field, enter the person's last name, followed by a comma, and then enter the first name. If one match is found, the person's name and ID are returned. If more than one match is found, the ID and Name Extended Search window will appear.

- **Search by Partial ID:** Enter a partial ID in conjunction with the wildcard % for any number of unspecified characters. If only one match is found, the name and ID will be returned on the form. If more than one match is found, the ID and Name Extended Search window will appear.
- **Search by Partial Name:** Make sure the ID field is blank and then enter a partial name using the first few letters of either first or last name followed by the wildcard (%). You may also use the wildcard in both names at the same time. If one match is found, the person's name and ID are returned. If more than one match is found, the ID and Name Extended Search window will appear.
- **Alternate Search:** The alternate ID Search Form, GUIALTI, allow searching on any combination of: SSN, birth date, ID #, last name, first name, and middle name.
- **ID and Name Extended:** The Extended search allows you to expand the search to include name, SSN, birth date, city, state, and zip. Again use the wild card % to assist in searching.

**Revisions:** January 3, 2013 - Created