

# Tips on Creating New Records and Using Common Matching

## The importance of not duplicating records

- When creating a new person it is extremely important to do a thorough search before creating the record.
- Creating duplicate records causes numerous problems.
  - Students may end up having registration on one record, financial aid data on another and payment history on yet another record.
  - This causes issues when it comes to reporting correct information to federal and state agencies
  - Students may encounter problems when viewing data such as transcript information.
- There is no easy way to combine records.
  - To combine several records into one is a manual process which requires significant analysis and each record has to be handled separately.

## Checking for matches when creating a new person

To create a new record for a student or an employee, go to SPAIDEN, PPAIDEN or directly to GOAMTCH. If you start off on SPAIDEN or PPAIDEN you will be taken to GOAMTCH where you will enter search criteria before creating the new record.

Click on the 'Generate ID' icon.

Oracle Developer Forms Runtime - Web: Open > SPAIDEN

File Edit Options Block Item Record Query Tools Help

General Person Identification SPAIDEN 7.3 (TEST0829)

ID:

Current Identification Alternate Identification Address Telephone Biographical E-mail Emergency Contact

ID:  Name Type:

**Person**

Last Name:

First Name:

Middle Name:

Prefix:

Suffix:

Preferred First Name:

Full Legal Name:

**Non-Person**

Name:

**ID and Name Source**

Last Update

User:

Activity Date:

Origin:

**Original Creation**

User:

Create Date:

ID number; LIST for person; COUNT HITS for non-person; DUP ITEM to generate ID; DUPLICATE RECORD for Alternate ID look-up.  
Record: 1/1 | | | | <OSC>

When you click on the 'Generate ID' icon you are taken to GOAMTCH where you will perform a thorough search before creating the new person.

The screenshot shows the Oracle Developer Forms Runtime interface for the GOAMTCH application. The window title is "Oracle Developer Forms Runtime - Web: Open > SPAIDEN - GOAMTCH". The browser address bar displays "Common Matching Entry GOAMTCH 7.4.1.1 (TEST0829)". The main form area is titled "Data Entry" and contains various input fields for personal information. The "Matching Source" is set to "PERSON". Below the data entry fields is a "Potential Matches" table with columns for ID, Name, Matched Address, Telephone, and E-mail. The table is currently empty. At the bottom, there are "Matching Rule Sets" and a status bar showing "Record: 1/1".

Do a next block or control page down which will take you into the form.

In this example I am asked to create a record for someone who has given us the following information:

Last Name: Sankies  
 First Name: Lark  
 Street Address: 12 Front Street  
 City: Fort Myers  
 State: FL  
 SSN/SIN/TIN: 555-99-1212  
 Birth Date: 16-Sep-1970  
 Gender: Female

Determining which and how much information to enter will require you to make some judgments and also be creative. The reason for this will be explained below.

Click 'Duplicate Check'

Click on the 'Duplicate Check' icon.

Oracle Developer Forms Runtime - Web: Open > SPAIDEN - GOAMTCH

File Edit Options Block Item Record Query Tools Help

Common Matching Entry GOAMTCH 7.4.1.1 (TEST0829)

ID: GENERATED Matching Source: A\_PERSON Create Person Record View Comments

**Data Entry**

Last Name:  Non-Person Name:

First Name:  SSN/SIN/TIN: 555991212

Middle Name:  Birth Date: Day:  Month:  Year: 1970

Address Type: MA Mailing Gender: Female

Street Line 1:  Telephone Type: MA Mailing

Street Line 2:  Telephone:  -

Street Line 3:  E-mail Type: APPL Applicant Email Address

City:  E-mail:

State or Province:  Duplicate Check Select ID Details Update ID View Comments Create New

ZIP or Postal Code:  County:  Nation:

**Potential Matches (1)**

ID	Name	SSN/SIN/TIN	Birth Date	Gender	Matched or Hierarchical Address	Telephone	E-mail
@00022950	Ambris, Lark	555991212	16-SEP-1970	F	No Matching or Hierarchical Address found	No Matches	No Matches

Clear and Return to Data Entry All Addresses All Telephones All E-mails

Matching Rule Sets

1=Primary SSN/SIN/TIN Match, ID NULL Match, First Name NULL Match, Middle Name NULL Match, Birth Day NULL Match, Birth Month NULL Match, Birth Year Match, Birth

Current identification number. An \*\* indicates a changed ID.

Record: 1/1 <OSC>

As you can see, I only entered the applicant's social security number, year of birth and sex.

Here are the reasons:

- In the case of a female applicant the individual may have applied to the college at an earlier date using their maiden name and later reapplied using their married name.
- I left out the day and month of the birth date because the day and month are sometimes transposed.

As you can see this is the same person only the last name is different.

Once you've confirmed it's the same person as on the application, select either the 'Select ID' or 'Update ID' icon. When you select the 'Select ID' icon it allows you to make changes to data that may need to be updated such as the last name and address in this case. Selecting the 'Update ID' icon will automatically allow updates of new information provided the no information existed in that field. If you had entered the address and nothing was in the address field in the system then the new address will automatically be added. The process **will not** overwrite existing information.

Since the first line is the record I wanted and I clicked on the 'Update ID' icon I received a warning message telling me certain data will not be updated. I am then taken back to SAPIDEN after clicking OK where I can update and save the new information.

If the applicant had only provided a partial social security number I could have entered what I know and performed the search. See below.

Oracle Developer Forms Runtime - Web: Open > SPAIDEN - GOAMTCH

File Edit Options Block Item Record Query Tools Help

Common Matching Entry GOAMTCH 7.4.1.1 (TEST0829)

ID: GENERATED Matching Source: A\_PERSON Create Person Record View Comments

**Data Entry**

Last Name: Sankies Non-Person Name:

First Name: Lark SSN/SIN/TIN: 555 Partial SSN.

Middle Name:  Birth Date: Day:  Month:  Year: 19

Address Type: MA Mailing Gender: Female

Street Line 1: 12 Front St Telephone Type: MA Mailing Telephone:  -

Street Line 2:  E-mail Type: APPL Applicant Email Address

Street Line 3:  E-mail:

City: Fort Myers

State or Province: FL Florida

ZIP or Postal Code:

County:

Nation:

Duplicate Check Details View Comments

Select ID Update ID Create New

Match Potential Matches (140)

ID	Name	SSN/SIN/TIN	Birth Date	Gender	Matched or Hierarchical Address	Telephone	E-mail
@00015662	Tanigawa, James H.	555871375	12-SEP-1985	M	No Matching or Hierarchical Address found	No Matches	No Matches
@00019566	Antitori, Ivana L.	555772912	16-DEC-1989	N	No Matching or Hierarchical Address found	No Matches	No Matches
@00022071	Issa, Abdulrehman M.	555537439	26-MAY-1978	M	No Matching or Hierarchical Address found	No Matches	No Matches
@00022950	Ambris, Lark	555991212	16-SEP-1970	F	No Matching or Hierarchical Address found	No Matches	No Matches
@00102738	Flipse, Silvia H.	555908928	23-MAY-1949	F	No Matching or Hierarchical Address found	No Matches	No Matches

Clear and Return to Data Entry All Addresses All Telephones All E-mails

Matching Rule Sets

1=Primary SSN/SIN/TIN Match, ID NULL Match, Last Name/Non-Person Name No Match, First Name Match, Middle Name NULL Match, Birth Day NULL Match, Birth Month N

Current identification number. An \*\* indicates a changed ID.

Record: 8/?

Here's another scenario:

Last Name: Sanchez  
First Name: Alexander  
Street Line 1: 123 Golden Drive  
City: Cape Coral  
State: FL  
SSN/SIN/TIN 888-22-3399  
Birth Date: 06-JUL-1985

I perform the search entering all of the above information. See below for the results.

The screenshot shows the Oracle Developer Forms Runtime interface for a 'Common Matching Entry' form. The form is titled 'GOAMTCH 7.4.1.1 (TEST0829)'. It contains several data entry fields for personal information, including Last Name (Sanchez), First Name (Alexander), Address (123 Golden St, Cape Coral, FL), and Birth Date (06-JUL-1985). Below the form is a table of potential matches. The first row is highlighted, showing a match for 'Sanchez, Alex R.' with SSN/SIN/TIN 888-22-3399 and Birth Date 07-JUN-1985. The table also lists other potential matches for 'Sanchez, Alejandro', 'Santoro, Alexandra', 'Sanders, Aleeta F.', and 'Santa Maria, Alexander'. The interface includes various navigation and action buttons like 'Duplicate Check', 'Details', 'View Comments', 'Select ID', 'Update ID', and 'Create New'.

ID	Name	SSN/SIN/TIN	Birth Date	Gender	Matched or Hierarchical Address	Telephone	E-mail
@00022951	Sanchez, Alex R.	888-22-3399	07-JUN-1985	M	MA=123 Golden Drive Cape Coral FL 33909	No Matches	No Matches
@00105426	Sanchez, Alejandro		12-JAN-1974	M	No Matching or Hierarchical Address found	No Matches	No Matches
@00120104	Santoro, Alexandra		01-JAN-1931	F	No Matching or Hierarchical Address found	No Matches	No Matches
@00138867	Sanders, Aleeta F.		18-APR-1944	M	No Matching or Hierarchical Address found	No Matches	No Matches
@00141038	Santa Maria, Alexander		27-OCT-1989	M	No Matching or Hierarchical Address found	No Matches	No Matches

As you can see the first row returned is one I'm interested in. Here are some important things to note. The first name in Banner is Alex. The search allows you to perform searches using aliases. Aliases are usually Bob=Robert, Alex=Alexander Catherine=Katherine etc. The list of aliases are maintained locally so if you come across any new ones please let your supervisor know so they can be added to the database. If you take a look at the birth date, in Banner it is 07-Jun-1985 but the applicant supplied 06-Jul-1985. Transposing the day and month is a common mistake being made during data entry so please be careful.

Once you've completed your search and you're sure the applicant does not already exist then click on the 'Create New' icon and the record will automatically be created with the data you entered.

**Common Matching Entry** GOAMTCH 7.4.1.1 (TEST0829) View Comments

ID: GENERATED      Matching Source: A\_PERSON      Create Person Record

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**Data Entry**

<b>Last Name:</b> Layne	<b>Non-Person Name:</b> <input type="text"/>
<b>First Name:</b> Petra	<b>SSN/SIN/TIN:</b> 000118888
<b>Middle Name:</b> Simone	<b>Birth Date:</b> Day: 12 Month: 12 Year: 1987
<b>Address Type:</b> MA Mailing	<b>Gender:</b> Female
<b>Street Line 1:</b> 3 Country Rd	<b>Telephone Type:</b> MA Mailing
<b>Street Line 2:</b> <input type="text"/>	<b>Telephone:</b> 239 - 9991212 <input type="text"/>
<b>Street Line 3:</b> <input type="text"/>	<b>E-mail Type:</b> APPL Applicant Email Address
<b>City:</b> Fort Myers	<b>E-mail:</b> <input type="text"/>
<b>State or Province:</b> FL Florida	
<b>ZIP or Postal Code:</b> 33919	
<b>County:</b> <input type="text"/>	
<b>Nation:</b> <input type="text"/>	

             
           

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**Match** Potential Matches (4622)

ID	Name	SSN/SIN/TIN	Birth Date	Gender	Matched or Hierarchical Address	Telephone	E-mail
@00021629	Cruz, Dorgeris	000000000	02-JUL-1973	F	No Matching or Hierarchical Address found	No Matches	No Matches
@00022743	Patel, Hardik C.	000000000	04-FEB-1985	M	No Matching or Hierarchical Address found	No Matches	No Matches
@00100014	Naranjo, Christian C.	000005826	26-DEC-1963	M	No Matching or Hierarchical Address found	No Matches	No Matches
@00100206	Emerson, Andrea	000005818	01-JAN-1965	F	No Matching or Hierarchical Address found	No Matches	No Matches
@00100207	Etheridge, Bonnie	000005819	01-JAN-1965	F	No Matching or Hierarchical Address found	No Matches	No Matches

          

**Matching Rule Sets**

1=Primary SSN/SIN/TIN Match, ID NULL Match, Last Name/Non-Person Name No Match, First Name No Match, Middle Name NULL Match, Birth Day No Match, Birth Month

Current identification number. An \*\* indicates a changed ID.

Record: 1/?      ...      <OSC>

Search results are above.

Created record is below.

Oracle Developer Forms Runtime - Web: Open > SPAIDEN - GOAMTCH

File Edit Options Block Item Record Query Tools Help

Common Matching Entry GOAMTCH 7.4.1.1 (TEST0829)

ID: GENERATED Matching Source: A\_PERSON Create Person Record View Comments

**Data Entry**

Last Name: Layne Non-Person Name:

First Name: Petra SSN/SIN/TIN: 000118888

Middle Name: Simone Birth Date: Day: 12 Month: 12 Year: 1987

Address Type: MA Mailing Gender: Female

Street Line 1: 3 Country Rd

Street Line 2:

Street Line 3:

City: Fort Myers

State or Province: FL Florida

ZIP or Postal Code: 33919

County:

Nation:

Match Potential Matches (4622)

**New ID Created**

Generated ID: @00022952. Identification record created; Biographical record created; Address record created; Telephone record created; E-mail record created.

ID	Name	SSN/SIN/TIN	Birth Date	Gender	Matched or Hierarchical Address	Telephone	E-mail
@00021629	Cruz, Dorgeris	000000000	02-JUL-1973	F	No Matching or Hierarchical Address found	No Matches	No Matches
@00022743	Patel, Hardik C.	000000000	04-FEB-1985	M	No Matching or Hierarchical Address found	No Matches	No Matches
@00100014	Naranjo, Christian C.	000005826	26-DEC-1963	M	No Matching or Hierarchical Address found	No Matches	No Matches
@00100206	Emerson, Andrea	000005818	01-JAN-1965	F	No Matching or Hierarchical Address found	No Matches	No Matches
@00100207	Etheridge, Bonnie	000005819	01-JAN-1965	F	No Matching or Hierarchical Address found	No Matches	No Matches

Clear and Return to Data Entry All Addresses All Telephones All E-mails

Matching Rule Sets

1=Primary SSN/SIN/TIN Match, ID NULL Match, Last Name/Non-Person Name No Match, First Name No Match, Middle Name NULL Match, Birth Day No Match, Birth Month

Current identification number. An \* indicates a changed ID.

Record: 1/? <OSC>

Oracle Developer Forms Runtime - Web: Open > SPAIDEN

File Edit Options Block Item Record Query Tools Help

General Person Identification SPAIDEN 7.3 (TEST0829)

ID: @00022952 Layne, Petra S. Generate ID:

Current Identification Alternate Identification Address Telephone Biographical E-mail Emergency Contact

From Date: 21-SEP-2007 To Date:

Inactivate Address

Address Type: MA Mailing Source:

Sequence Number: 1

Street Line 1: 3 Country Rd

Street Line 2:

Street Line 3:

City: Fort Myers

State or Province: FL Florida

ZIP or Postal Code: 33919

Delivery Point:

Correction Digit:

County:

Nation:

Carrier Route:

Telephone Type: MA Mailing

Telephone: 239 - 9991212

**Last Update**

User: DSANKIES

Activity Date: 21-SEP-2007

Address start date, format (DD-MON-YYYY); blank is always effective.

Record: 1/1 <OSC>