Common Matching was created to help institutions create and manage general person records. General person is a generic term that refers to people (persons) and companies (non-persons).

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 records. The Common Matching “HR_Match” rule, specific to the UA HR Application, is set up in Banner and will match the data entered based upon the following hierarchy of search criteria:

1. The nine-digit SSN
2. The first three characters in the first name
3. The first five characters in the last name

You must enter the following:
1. A minimum of the first five characters of the last name
2. A minimum of the first three characters of the first name

You can optionally include:
3. The nine-digit SSN, if known

To ensure a person record does not exist in Banner for a new hire and to avoid a duplicate ID, you must verify certain information prior to entering data for an employee. To begin a name search, enter the name GOAMTCH in the Go To… field from any Banner Menu or enter PPAIDEN when you first log into Banner.

Note: To update biographic/demographic information for an employee that already exists in the system, you can go to PPAIDEN and search by name (GUIALTI) to pull the record forward and update employee information using normal data entry procedures and standards.
Using the GOAMTCH Form

Type **GENERATED** in the ID field or click on the **Generate ID** icon to populate the field. Once you have completed this action, select the appropriate common matching source code "**HR_MATCH**" from the drop down menu list of the Matching Source field or enter "**HR_MATCH**" in the field.
In order to find any potential matches, you must perform all three of the following searches on each new employee independently:

1) Name  
2) Name with SSN  
3) Name with Birth Date

**NAME**

**Ctrl Page Down** to advance to the next block or click in the last name field. Enter a minimum of the first five characters in the last name field and a minimum of the first three characters in the first name field based on HR matching rules. The fields for Address Type and Telephone Type will display a default value of ‘HR’ and the Gender field will display a default value of ‘Null’ when you begin a name search on GOAMTCH.

**Example:** Woody Woodpecker – enter **Woodp** for last name and **Woo** for first name. If the last name has hyphenation, you can choose to enter the name before or after the hyphen (-) to search for a match or potential matches. The minimum information to enter should be last name, first name, and SSN (if available) to ensure a full search has been completed in the database before you determine a new record should be created.

**Note:** You must enter the minimum name search criteria listed above in order to pull forward the broadest pool of match or potential match records in the database to ensure that a duplicate PIDM is not created.

Click on the **Duplicate Check** icon to pull forward a match or any potential matches.
Review the match results. If a potential match exists, click Select ID to pull the record forward on PPAIDEN and proceed with data entry procedures.

**Birth Date**

You may enter the last name, first name, and birth date information (as previously provided) to see if a match or potential match exists in the database.
If a match or potential match is not found, enter the SSN (if available) in addition to the first five characters of the last name and the first three characters of the first name, click on the **Duplicate Check** icon to pull forward potential matches.

**Note:** You can enter the name and SSN with an incorrect birth date and a match or potential match will pull forward.
If no match or potential match record(s) pull forward, a status message in a pop-up window will display “No matches found, create as new?” If you click ‘No’, you will remain on GOAMTCH and should refer to the instructions in the Name section. If you click ‘Yes’, please refer to the instructions in the Create New section (Page X) after reviewing the procedures below.

Enter additional information, such as address, SSN (if available), birth date and gender or any combination of search criteria. Click on Duplicate Check icon and check again for potential matches.

**Note:** Although HR does not enter e-mail addresses for employees, each campus has their own e-mail system which is fed into GOREMAL through batch processing and then into the employee directory (EDIR). The e-mail types for each campus are as follows: ‘FGEN’ for UAF, ‘AGEN’ for UAA, ‘JEMP’ for UAS.

**Match or Potential Match Records**

If results return a match or potential match, compare the information against the new employee’s hiring documents to ensure that an additional ID is not generated and, thus, a duplicate PIDM.

If a match record pulls forward, you will see information on the Match tab that references the ID, name, SSN, birth date, and gender of the person record you have entered. If there is no match, but potential matches exist, you may see additional information of ‘Matched or Hierarchical Address’ on the returned Potential Matches tab.
If potential matches exist, a status message in a pop-up window will display “**Match status is ‘New’ but potential matches exist from prior rule.**” Click **OK** to pull forward all potential matches.

If an exact match or any of the potential matches do not appear to match the new employee information, click on the **Create New** icon.
Potential matches can be sorted dynamically by ID or by name in ascending or descending order using the Sort up and down arrow buttons ▲ ▼ for the ID and Name fields. The default sort order is by ID in descending order. Clicking on the arrow in the ID field can switch the sort from lowest to highest or highest to lowest.

When you click on the Sort up arrow ▲ in the Name field, the sort organizes the results in alpha order (A-Z). When you click on the Sort down arrow ▼, the sort organizes results in reverse alpha order (Z-A).

Once you have clicked on an up or down arrow, you can put your mouse over the arrow to see the tool switch hint message, click on the arrow again, reverse its direction, and perform a new sort. For example, after you have sorted on ID or name in A-Z order (using Sort up arrow), you can click on the arrow again to change it to a Sort down arrow, and resort the data in Z-A order.

If the last name of an employee has changed since previous affiliation with UA due to marriage, divorce, or by some other legal process, go to GOAMTCH. Complete a full search on the maiden name with the SSN and on the new name with SSN to search for a match or potential match. If an employee record exists, click on Select ID, go to PPAIDEN and follow the normal data entry procedures and standards.

Note: A copy of the SSA card with the new name of the employee must be received by the MAU human resources office before an update is entered in the system. If no SSA card available, do not change the name in Banner.
If previous affiliation with UA unknown, If no match or potential match records display after the additional information is included, a status message in a pop-up window will display the message “No matches found, create as new?” Click ‘Yes.’

![Pop-up window showing no matches found, create as new?]

If there truly is no match or potential match exists in the database after the additional information is entered, a status message in a pop-up window will display that a New ID and other records were created or not created in Banner.

![Pop-up window showing new ID created]

Click OK. The data entered on GOAMTCH will be inserted in the appropriate fields on PPAIDEN.

**Note:** Ensure that the name matches the SSA card. If not, a name change cannot be entered until appropriate supporting documentation is received from the employee.
Enter the address using ‘HR’ Address Type. Please refer to the General Person Standards at http://www.alaska.edu/hr/procedures/PDF/banner.data_entry.hr_data_entry_standards.pdf for entry procedures.

**Note:** A telephone number entered on the Address tab will also appear on the Telephone tab; however, the updated telephone number on the Telephone tab will not be identified as the primary phone number. Changes to phone contact information must be updated on the Address tab.
Confirm and/or enter data for gender, birth date, and SSN on GOAMTCH. Additional information is required for an employee on the Biographical tab. Please enter the following based on data from the employee’s hiring documents.

- citizenship
- marital status
- ethnicity

Once all required information has been entered, save the record by pressing function key F10, clicking on the Save icon on the toolbar at the top, or selecting ‘Save’ from the File Menu. You may also update information on any one of the other tabs identified within the PPAIDEN form (i.e., telephone). Enter any other information such as the telephone number on the appropriate tabs.
E-mail contact information should not be added or changed at any time on the E-mail tab by the HR Technician.

Note: Emergency Contact information is not entered in Banner by the Human Resources Office. However, you may see emergency contact data on the Emergency Contact tab that was entered by the employee through UAOnline or by Student Application Services.
Using Other Common Matching Icons

Create New

If the record you are searching for is not listed (none of the potential matches relate to the new employee data you need to enter), select the **Create New** icon and create a new record.

**Note**: If you are unable to enter the remaining biographic/demographic information and forget to write down the generated ID of the new employee, you can go to **GOAMTCH** and enter the minimum search criteria to find the record and avoid creation of more than one PIDM. If you have identified a match or potential match, click on the **Select ID** icon, enter **PPAIDEN**, and complete data entry. You must save the record after entry is completed on each tab.

A pop-up window will display “Generated ID:” the new number, and the status of other biographic/demographic information. Click **OK** and go to **PPAIDEN** to complete any required data entry.

Generated ID: 30949760. Identification record created; Biographical record not created; Address record create failed; Telephone record not created; E-mail record not created.
Details

If you identify a match or potential match when on GOAMTCH, click on the Details icon and a status message in a pop-up window with an Identification link will display. The link will take you directly to PPAIDEN where you can enter additional employee information. Refer to General Person Standards http://www.alaska.edu/hr/procedures/PDF/banner.data_entry.hr_data_entry_standards.pdf for data entry. When you exit PPAIDEN, you will return to GOAMTCH.

Update ID

To make changes to biographic/demographic information for a current or past employee, go directly to the PPAIDEN form.

** DO NOT use GOAMTCH to update any employee information. Doing so will inactivate the old information and create a new sequence number. However, HR uses one sequence record for the HR Address, HR Telephone Number, and HR E-mail Address in Banner. When entering employee information, please follow General Person Standards at http://www.alaska.edu/hr/procedures/PDF/banner.data_entry.hr_data_entry_standards.pdf.
If you mistakenly select to update information on GOAMTCH using the **Update ID** icon, only the newly generated ID will pull forward.

If a previous telephone record exists, a status message in a pop-up window will display **“Biographical record not updated; Address record not valid; Telephone record created; E-mail not updated”**. However, when you access **PPAIDEN** and click on the Address tab, the previous phone number remains. The Telephone tab displays the new phone number as secondary and the previous phone number remains primary.
To review updates, go to **PPAIDEN** and click on the applicable tab(s) or press *Ctrl Page Down* to access newly entered information.

**Note**: Changes to address and telephone information must be entered on the Address tab.

**Note**: The previous address will be inactivated and a new sequence number will be created.
Note: No check box selected and no sequence number generated.
Use of GOAMTCH Buttons

- **Duplicate Check** – Select this button when you want to trigger the Common Matching process without performing a next block function (ctrl page down).

- **Details** – Select this button if Common Matching has found potential matches and you need to do additional research to see if any other person in the Banner database matches the information you are adding. A pop-up window will display which forms you can select to access.

- **View Comments** – Select this button to view non-technical details about the matching source and related rule sets to help you understand the type of data that should be entered on **GOAMTCH** and the matching results that are produced. This button is available from both the Match and Potential Matches blocks.

- **Select ID** – Select this button if Common Matching has found an existing record that is a match for the record you are entering. This button populates the form on which you were entering data with the existing Banner data for that person or non-person. You are automatically taken back to the original form and a new PIDM is not added to the database.

- **Update ID** – **DO NOT USE.** Updated information should be entered through **PPAIDEN** only.

- **Create New** – Select this button if the Common Matching process does not return any matches or potential matches that appear to be the person you are entering. This button creates a new PIDM in Banner. If biographical data, e-mail address, telephone number, or complete address information has been entered on **GOAMTCH**, the corresponding records will be created.