Introduction

This job aid includes sample rules that could be set up for Common Matching, showing one example each for person and non-person data.

In addition, a sample rule with sample results is included for person data. The examples start on the pages that follow.

<u>Warning</u>: The rules presented in this job aid are examples only; the rules appropriate for the data at your institution may differ from those shown.

Sample rule for person data

This is a sample rule that could be used for person data.

Priority 1			
Column Name	**Data Element**	**Length**	**Match on Null Data**
SPRIDEN_SEARCH_LAST_NAME	LAST NAME/NON-PERSON NAME	5	No
SPRIDEN_SEARCH_FIRST_NAME	FIRST NAME	5	Yes
SPBPERS_SEX	GENDER	1	Yes
SPBPERS_SSN	SSN/SIN/TIN	9	Yes
Priority 2			
Column Name	**Data Element**	**Length**	**Match on Null Data**
SPRIDEN_SEARCH_LAST_NAME	LAST NAME/NON-PERSON NAME	20	No
SPRIDEN_SEARCH_FIRST_NAME	FIRST NAME	5	Yes
SPRADDR_CITY	CITY	10	Yes
SPRADDR_STREET_LINE1	STREET LINE 1	15	Yes
SPRADDR_ZIP	ZIP/POSTAL CODE	5	Yes
SPBPERS_SSN	SSN/SIN/TIN	9	Yes
Priority 3			
Column Name	**Data Element**	**Length**	**Match on Null Data**
SPRIDEN_SEARCH_LAST_NAME	LAST NAME/NON-PERSON NAME	60	No
SPBPERS_SSN	SSN/SIN/TIN	9	No
SPRTELE_PHONE_AREA	TELEPHONE AREA CODE	3	Yes
SPRADDR_STREET_LINE1	STREET LINE 1	15	Yes
SPRADDR_CITY	CITY	10	Yes

Additional rule settings for person data

These are the suggested settings for the example rules presented. These settings may affect performance of your rules.

1. Add comments for your rule on the Common Matching Rules Form (GORCMRL) to better assist users in selection for match process.

2. Check **Transpose First/Last Name** on the Common Matching Source Rules Form (GORCMSC) to allow search to look for name entered matches in either first or last name.

    Note: If entering only one part of the name, enter the details in the last name field and the search process will look for a match in both the first and last name fields.

    Warning: It is not recommended to enable this option, and set your rule on the Common Matching Rules Form (GORCMRL) to "Match on Null Data = Yes" and then not enter a first name. This will cause a significant increase in processing time.

3. Check **Allow Alias Wildcard Use** on the Common Matching Source Rules Form (GORCMSC) to append a % wildcard character to what is entered on GOAMTCH to look for associated alias values on the Name Translation Rules Form (GORNAME). For instance, if you enter 'Nat' on GOAMTCH and you have a record on GORNAME for Nate = Nathan, the system will look for Nat% in the GORNAME table and therefore display potential matches of Nate or Nathan.

4. Check **Allow Length Override** on the Common Matching Source Rules Form (GORCMSC) to allow the search process to use the number of characters entered for selection even if less are entered than defined on the rule on the Common Matching Rules Form (GORCMRL).

5. Check **Prevent ID Creation on API Failure** on the Common Matching Source Rules Form (GORCMSC) to avoid creating a record when missing required data fields are not populated on the Common Matching Entry Form (GOAMTCH). Enabling this option requires the user to enter complete Address, Telephone and/or E-mail details in order to create a new ID.

6. Consider defining a hierarchy for address display on the Common Matching Source Rules Form (GORCMSC), which results in the display of existing addresses based on the hierarchy defined even if the existing address does not match the search criteria entered. You can use this feature for telephone and e-mail as well.

Sample rule with sample results

This is a sample rule that could be used for person data, showing how an incoming record is processed and the results.

Note: This is a fairly simple example, for illustration purposes.

Priority 1			
Column Name	**Data Element**	**Length**	**Match on Null Data**
SPRIDEN_SEARCH_LAST_NAME	LAST NAME/NON-PERSON NAME	5	No
SPRIDEN_SEARCH_FIRST_NAME	FIRST NAME	5	Yes
SPBPERS_SSN	SSN/SIN/TIN	9	Yes
SPRADDR_ZIP	ZIP/POSTAL CODE	5	Yes

Incoming record

This is an example of the data entered on the Common Matching Entry Form (GOAMTCH).

Element	Entered Data to Match
LAST NAME / NON-PERSON NAME	Smithsonian
FIRST NAME	Samuel
SSN/SIN/TIN	636363636
ZIP/POSTAL CODE	111111

How the record is processed

The Primary Match looks for all records that match "SMITH," finds the following records and puts them in a temporary table.

Name	SSN	ZIP
Smith, Suzanne	555555555	99999
Smith, Louise	111111111	99999
Smithsonian, Sam	333333333	11111

Then the Primary Match looks for all records that match "636363636," finds the following records and puts them in the temporary table.

Name	SSN	ZIP
Jones, Harry	636363636	12345
Burke, Sharon	636363636	12345

Results

The Secondary Match reviews the results in the temporary table to see if any of the returned PIDMs match the secondary information (e.g., the zip code) and returns the results to the Potential Match tab.

Name	SSN	ZIP	Results
Jones, Harry	636363636	12345	Primary SSN Match, Name No Match, Address No Match
Burke, Sharon	636363636	12345	Primary SSN Match, Name No Match, Address No Match
Smith, Suzanne	555555555	99999	Primary Name Match, SSN No Match, Address No Match
Smith, Louise	111111111	99999	Primary Name Match, SSN No Match, Address No Match
Smithsonian, Sam	333333333	11111	Primary Name Match, SSN No Match, Address No Match

Note: For an incoming record to be considered new when the record has already passed the Primary Match, all non-name data elements must be determined to be not matched, and none of the non-name elements may be null.

◀ Jump to TOC

Sample rule for non-person data

This is a sample rule that could be used for non-person data.

Priority 1			
Column Name	**Data Element**	**Length**	**Match on Null Data**
SPRIDEN_SEARCH_LAST_NAME	LAST NAME/NON-PERSON NAME	5	No
Priority 2			
Column Name	**Data Element**	**Length**	**Match on Null Data**
SPRIDEN_SEARCH_LAST_NAME	LAST NAME/NON-PERSON NAME	10	No
SPRADDR_STREET_LINE1	STREET LINE 1	15	Yes
SPRADDR_CITY	CITY	10	Yes
Priority 3			
Column Name	**Data Element**	**Length**	**Match on Null Data**
SPRIDEN_SEARCH_LAST_NAME	LAST NAME/NON-PERSON NAME	20	No
SPRADDR_CITY	CITY	10	Yes
SPRTELE_PHONE_AREA	TELEPHONE AREA CODE	3	Yes
Priority 4			
Column Name	**Data Element**	**Length**	**Match on Null Data**
SPRIDEN_SEARCH_LAST_NAME	LAST NAME/NON-PERSON NAME	60	No
SPRADDR_CITY	CITY	10	Yes
SPRTELE_PHONE_NUMBER	TELEPHONE NUMBER	7	Yes

Additional rule settings for non-person data

These are the suggested settings for the example rules presented. These settings may affect performance of your rules.

1. Add comments for your rule on the Common Matching Rules Form (GORCMRL) to better assist users in selection for match process.

2. Check **Allow Alias Wildcard Use** on the Common Matching Source Rules Form (GORCMSC) to allow the search process to use user defined alias values in search match selection. The alias values for non-person names are specified on the Non-Person Name Translation Rules Form (GORNPNM).

3. Check **Allow Length Override** on the Common Matching Source Rules Form (GORCMSC) to allow the search process to use the number of characters entered for selection even if less are entered than defined on the rule on the Common Matching Rules Form (GORCMRL).

4. Check **Prevent ID Creation on API Failure** on the Common Matching Source Rules Form (GORCMSC) to avoid creating a record in error when missing required data fields are not populated on the Common Matching Entry Form (GOAMTCH). This option requires complete Address, Telephone and/or E-mail details in order to create a new ID.

5. Consider defining a hierarchy for address display on the Common Matching Source Rules Form (GORCMSC), which results in the display of existing addresses based on the hierarchy defined even if the existing address does not match the search criteria entered. You can use this feature for telephone and e-mail as well.