Determining a match

The Common Matching Entry Form (GOAMTCH) allows you to determine whether an entity (person or non-person) matches an existing record before it is entered into the database.

Procedure

Follow these steps to use the Common Matching Entry Form.

Step	Action
1	Access the data entry form to enter person or non-person data. Example: General Person Identification Form (SPAIDEN)
2	Click the **Generated** icon to generate an ID or enter a desired ID for the new person.
3	Perform a **Next Block** function. Result: You are automatically taken to the Common Matching Entry Form (GOAMTCH) *if* online Common Matching has been enabled on the Installation Controls Form (GUAINST) *and if* your user ID has not been exempted on the Common Matching User Setup Form (GORCMUS). If you are not automatically taken to GOAMTCH, you can choose to select it from the **Options** menu. Note: The ID or *Generated* will appear in the **ID** field of GOAMTCH.
4	If necessary, choose a matching source code for the **Matching Source** field. Note: This code may default in, depending on the setup on GORCMUS. You may or may not be able to select a source code other than the default, depending on the setup for your user ID.
5	Click the **View Comments** icon to view comments associated with the matching source.
6	Perform a **Next Block** function.
7	Enter available person data to be used in matching. The information entered in the Data Entry block can be used for updating an existing record or creating a new record.

Procedure, continued

Step	Action
8	Click the **Duplicate Check** icon or perform a **Next Block** function to execute the Common Matching algorithm. Result: If an exact match is found, the person and their data will display in the **Match** tab. The **Potential Match** tab will only be available if other potential matches are found.

IF the result is…	THEN follow these steps.
New	Click **Yes** to create a new PIDM. Result: A new Banner PIDM is created; data from the Data Entry block is inserted into the appropriate tables.
Match	To match the person in the top half of the form to the person found by the match, choose either: • **Select ID** to select the record and carry it back to the key block of the %IDEN form. • **Update ID** to update the record with data from top block. Clicking **Update ID** will update the following data, if it has been entered in the Data Entry block and is null in Banner: • Address type and address (A new sequence for the address will be created if the same type exists but address information is different.) • Telephone type and number • Email address type and email address • SSN/SIN/TIN • Date of Birth • Gender
Potential Match	Click the **Potential Match** tab to review the data. Click the **Details** button to view data about the potential match on other forms. Determine if the person is new or a match and select the appropriate icon.

Procedure, continued

Step	Action
9	After completing the update or insert, you will be returned to the key block of the %IDEN form to continue your data entry. Warning: If you have not selected any matching options, and depending on the setup for your user ID, you may be unable to perform a **Next Block** function to enter any data after returning to the %IDEN form.