Creating a New Person Record Using Common Matching

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Print-Friendly Summary [pdf]

Creating a new person record in Banner requires additional Banner access and training. For more information, contact the IT Training Team.

Entering a new person into the Banner system involves these steps:

1. Performing a thorough search for the person record in Banner to make absolutely sure that such a person record does not already exist.
2. Once the above has been done, creating a new person record, which includes the Common Matching process.
3. Accessing SPAIDEN or PPAIDEN to enter any additional information you may have about the person.

Step 1: Perform a Thorough Person Record Search

Before a new person record is entered into Banner, it is extremely important to ensure that a like record does not already exist in the system. Duplicate records create many problems, including serious bill and transcript discrepancies.

Follow the Search Tips to perform approximately three unique searches before deciding to create a new person record. Information that can help you determine whether the person already has a Banner Person Record include the Social Security Number; Date of Birth; and whether the person has ever been associated with PCC as an applicant, student, employee, or vendor.

Step 2: Create a New Person Record with Common Matching

Once you are confident that a like Person Record does not already exist, you are ready to begin creating a new person record, which includes the Common Matching process.

- Navigate to the form you have been trained to use for entering a new person record; for example, PPAIDEN, SPAIDEN, SAAQUIK or SRAQUIK.
- Make sure the ID field is blank. If it is not blank, with your curser within the ID field press the 'delete' key on your keyboard.
  - Note: Failure to make sure the ID field is blank will result in a Person Record with no G Number. If you made this mistake, see "Common Mistakes and How to Fix Them" at the bottom of this page.
- Click on the Generate ID icon on the right side of the ID field:

Get Started: Fill out the fields above and press Go.

- You will be taken to a screen called GOAMTCH (shown below). Verify that the ID field on the upper left reads "GENERATED."
- If the Matching Source field is blank, choose ONLINE_ENTRY from the drop-down list.
- Press "Go" to move to the Data Entry section.
1. Enter all the information you have about the person, including full name, mailing address, etc. Follow PCC's Data Entry Standards to enter the name and address.
   
   a. Use the person’s full legal name, not a nickname.
   b. Use “MA” for the address type (mailing address).
   c. Follow PCC’s Data Entry Standards to enter the address. No punctuation such as periods, number signs (#), and commas are necessary.
   d. If you know the zip code, enter it in the Zip Code field, then press tab on your keyboard. The city and state fields will be automatically populated.
   e. If the person’s address is in the USA, it is acceptable to leave the Nation field blank.
   f. Leave the Non Person Name field blank. It is only used for PCC vendors and similar “non-person” entities.
   g. Even though PCC uses G Numbers, it is very important to enter the Social Security Number in the SSN field, if it is known. New students should be asked to provide their SSN, if they have one. Missing SSNs are the primary cause of duplicate person records in Banner!
   h. Be careful when entering the Date of Birth. The order presented -- day, then month, then year -- is sometimes confusing to Banner-users.

1. You are now ready for the “Common Matching” step, which automatically checks for potential duplicate records in Banner before your person record is finalized.
After all known data has been entered, click **Duplicate Check** in the lower left of the Data Entry Block:

2. One of two things will happen:
   a. You will get the message "No Matches Found, create as new?" If you receive this message, press Yes, and skip steps 9 and 10 below.
   b. You will see list of Matches or Potential Matches in the lower portion of your screen.

1. When the system finds a close potential match, the **Match** tab will show a person record which may match the person you are trying to enter as a new record.

   When the system finds more than one possible match, the **Potential Match** tab will be populated (see above). Potential matches occur when some, but not all, fields match, or multiple records match exactly. For example, first name and last name match but Birth Date does not match.

   Review all potential matches carefully:
   a. If more than five potential matches exist, use the scroll bar on the bottom to see additional matches.
   b. Use the drop-down arrow in the **All Addresses** field to see a list of current and previous addresses for each potential match.
   c. Check the **Match Results** field to determine why each entry was included in the list of potential matches.
   d. Click the **Clear** icon to clear all Potential Matches and return to the Data Entry block.

2. Was a match found? Is more information needed before you're ready to create a new person record? Choose the appropriate Common Matching Icon to indicate how you want to proceed:
   a. **Create New** is the icon to choose if you are ready to create a new person record. You have reviewed all potential matches listed and have determined that they are not the same person you wish to add as a new person record.
   b. **Select ID** is the icon to choose if you see a match in the lower section ('Matches' or 'Potential Matches') and you want to cancel the creation of your new person record. Be sure the "match" is highlighted before selecting this icon. Choosing Select ID means that you are changing your mind about adding any new information into Banner, you have found that the person already has a record in Banner, and you want to end this process.
   c. **Update ID** is the icon to choose if you see a match in the lower section ('Matches' or 'Potential Matches') and you want to take what you typed in the upper section and apply it to the existing record. For example, if the match you see has an old address or no SSN, and you have entered new address or SSN information about this person in the Data Entry section above, choose Update ID to add the SSN (and any other new information) to their existing Banner record. Be sure the "match" is highlighted before selecting this icon.
   d. **Details** is not in use at this time.
This is a record that was only partially created with a name.

Step 3: Enter Additional Information in PPAIDEN, SPAIDEN, or other Form

Now that you have created a new person record, you can go into the form you have been trained to use for person record entry, for example, SAAQUIK, SRAQUIK, PPAIDEN or SPAIDEN and enter any additional information you have about the person. For example, you may want to enter the person's emergency contact or legacy information.

COMMON MISTAKES and How to Fix Them

Sometimes users forget that the "ID" field must be blank when they press "Generate ID" to begin the process of creating a Person Record. When this happens, a G Number is not automatically created for the person.

If your newly-created Person Record does not show a G Number but instead shows the person's SSN, you can fix it in PPAIDEN or SPAIDEN (whichever form you have data-entry access to) on the "Current Identification" tab:

Here is how to fix a person record ID Mistake.

1. Type a capital G in the name field.
2. Type "GENERATED" in the ID field.
3. Click the "SAVE" button.

When you follow these directions, a G Number is automatically created for the Person Record after the fact.

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Banner Help

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