Common Matching for General Person

The General Person module is the starting point for entering data on any person/non-person associated with UMB. All persons/non-persons must first be entered into the database using the General Person Identification Form (SPAIDEN), which captures biographic/ demographic information. ("Non-persons" are entities such as vendor companies, banks, etc.)

The information maintained in this page is specific to the person/non-person and does not relate to the person's/non-person's involvement at UMB. All other modules/applications are dependent on the information captured and maintained in this page. Any changes or additions to biographic/ demographic information must be made on SPAIDEN.

*** IMPORTANT ***

Before entering a new General Person record, you MUST conduct a search using Person Common Matching criteria to ensure the entity does not already exist in SIMS. Each person/non-person should have only one General Person record. The presence of two chains of information for what is really the same individual (a situation which is referred to as a "duplicate PIDM") causes serious problems in SIMS. It can take hours of time to undo once it is discovered.

The Common Matching form (GOAMTCH) will be called automatically from SPAIDEN when an ID is generated or entered that does not already exist in SIMS.

Data Entry Standards

There are established Data Entry Standards that must be followed when entering or updating information in SIMS. The following are the most important to know initially.

Special Characters that are NEVER USED
The following characters are *never* to be used in SIMS data entry. They will cause reporting errors.

- **Comma (,)**
- **Pound sign (#)**
- **Asterisk (*)**
- **Ampersand (&)**
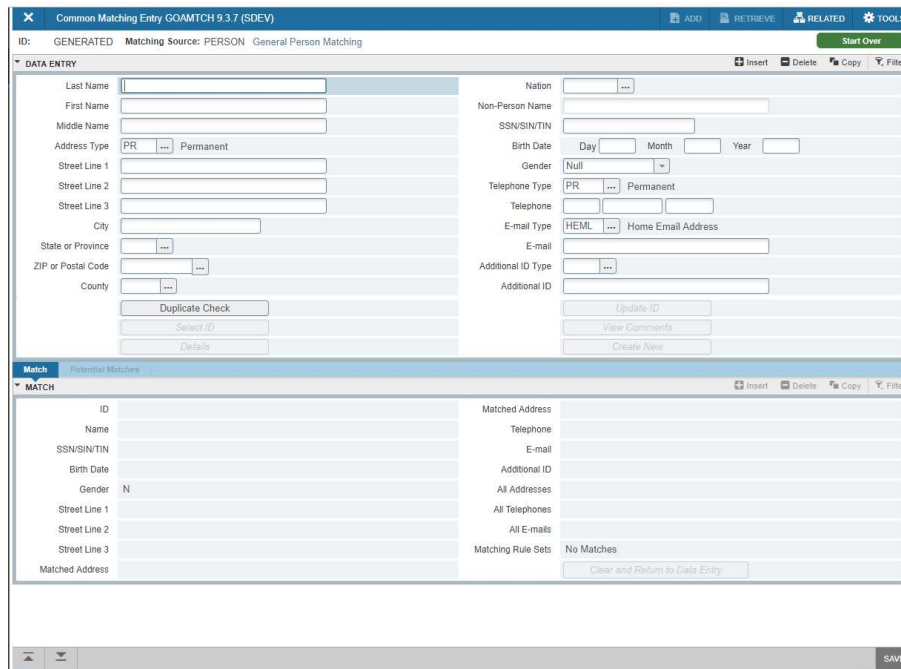- **Percent sign (%)**

Data Entry Conventions

Case	Enter all data using standard capitalization rules. NEVER use ALL uppercase or ALL lowercase letters.
Special Characters	Hyphens (-), apostrophes ('), periods (.), slashes (/) and spaces are allowed. However, use of these characters in the name field(s) may cause problems when conducting searches as the system requires an *exact* match in order to provide a search result.

Entering a New Person

1. Access **SPAIDEN**.
2. If you have an ID of the person to be created:
   a. Enter the ID in the **ID** field.
   b. In the **Matching Source** field, select **Person.**
3. If you do not have an ID:
   a. Click the **+** (plus) sign to the right of the **ID** field. "Generated" will appear in the ID field.
   b. In the **Matching Source** field, select **Person**.
4. Click **Go**.
5. The **GOAMTCH** page will appear.

6. Enter all available person data to be stored. **Enter at least name, address, SSN and date of birth** to ensure that the Common Match search is accurate.

   - Do NOT change the default PR for Address Type.
   - **Never use commas in data entry fields.**

   a. **Last Name** – Do not use titles, prefixes or suffixes. Use the appropriate field(s) for those purposes.
   b. **First Name** – Do not use titles, prefixes or suffixes. Use the appropriate field(s) for those purposes.
   c. **Street** – The system allows three lines of street address information. If there is an apartment and the full address is too long to fit on Street Line 1, fill in the address as:
      o *Street Line 1* – Street Address
      o *Street Line 2* **–** Apartment, Unit, Suite, etc.
   d. **PO Box** – If both a street address and PO Box number need to be maintained, enter the street address under the *permanent (PR)* address and the PO Box under the *local mailing (MA)* address.
   e. **Zip Code** – Must be entered for all U.S. addresses. Press **[Tab]** after entering.

- o SIMS uses a 5-digit Zip Code table instead of 9-digits. Therefore, the city name may not always be correct. If this occurs, click in the *City* field and enter the correct city name. You can also add the remaining 4-digits after you've pressed the **[Tab]** key. Enter a hyphen (-) first then the remaining 4-digits.
   f. **City** – This field will automatically populate when the zip code is entered and **[Tab]** is pressed.
   g. **State** - This field will automatically populate when the zip code is entered and **[Tab]** is pressed.
   h. **County** – This field will automatically populate when the zip code is entered and **[Tab]** is pressed.
   i. **Date of Birth**
   j. **SSN/SIN/TFN**
7. Click the **Duplicate Check** icon. There will be three possible results – New, Match, or Potential Match.
   a. If you have a name that is hyphenated, a match may not result based on the name. Review the results in detail, and conduct further searches (SOAIDEN) if necessary to ensure you have the correct person.

Matching Status - New (No Match)

If no records are found to match the rules, a status of **New** is returned. This enables you to create a new person record.

1. A pop-up box will appear in the upper right-hand corner asking **"No matches found, create as new?"**.
2. Select **Yes**. A pop-up box will appear with a new ID.
   a. If you select **No**, you will be returned to the GOAMTCH screen.
3. Click **OK.**
4. Navigate to the **SPAIDEN** page. You can continue entering the new person's information follow the established Data Entry Standards.

Matching Status - Match

If one and only one record matches the rules, a status of **Match** is returned and the **Match** tab will be highlighted. Data for the matching person will be returned for review. You must have entered at least a Name, Address, SSN and Birth Date for the *Match* rule to be reliable. Otherwise, you should contact the student and request more information.

It is possible to get both a *Match* and a *Potential Match* (both tabs will be highlighted). If this happens, MAKE SURE you have the correct person before proceeding.

1. Select the **Select ID** icon.

   Any usage of Common Matching for checking Suspense records for CRM Recruit, Web Admissions or any student tape load process **MUST** use the **Select ID** to process matches.

   NOTE: The **Update ID** feature is rarely used. Using **Update ID** will update the following fields if data was entered in the Data Entry section. When in doubt, **Select ID** should be used or you should contact the SIMS Team for assistance.

   - SSN/SIN/TIN if it is empty in SIMS.
   - Date of Birth if it is empty in SIMS.
   - Gender if it is unknown in SIMS.
   - Telephone and E-mail if it did not exist.
   - A new sequence for the address will be created if the same type exists but the address information is different.

2. A pop-up box will appear acknowledging the updates. Click **Ok.** Return to SPAIDEN. You MUST enter a Citizenship Code on the Biographical tab if one is not already present. If you are unable to enter a citizenship code, the Office of the Registrar will be able to assist. While in SPAIDEN, you can make additional updates to addresses, telephone numbers and/or email addresses, if needed. Changes to name, gender, date of birth, SSN and citizenship must be handled by the Office of the Registrar.

Matching Status - Potential Match

The **Potential Match** tab will only be available if:

- Some of the fields match, but not all, or
- Multiple records match exactly.

1. Review the data for each potential match. You can click the **Details** icon to view data about each highlighted person.
2. Determine if the person is **New** or a **Match**. Follow the instructions above for the correct matching status.