

HOW TO MATCH PERSON RECORDS IN BANNER SIS Person Matching Form (SZQMTCH)

General

The *Person Matching Form* is used to determine whether a person from whom data has been received electronically, i.e. via the web application for admission, already exists in the Banner production database.

The form is accessed as follows:

- **For Web Admissions Application processing:**

Use the Person Search item in the Navigation Frame or a Count Query Hits function from the **IDVR** field on the Applicant and Application Manual Verification window of the [Electronic Application Process Form \(SZAEAPS\)](#).

Manual matching is normally done only for records that the Batch Admissions Push Process (SZRETMT) put in Suspense, i.e. for whom it was unclear whether the applicant matched an existing person on Banner, or was an entirely new person. While it is possible to manual match records that have not already been processed by the Batch Push Process, it is not recommended to do so.

Related Forms

- Electronic Application Process Form (SZAEAPS)

Check List

Before you proceed, you must have the following information:

- Copy of Minerva web application suspense report may be helpful to select applicants for matching on the Electronic Application Process Form (SZAEAPS)
- Copy of paper application or printout of web text from Web App Display Form may be helpful to match data.

Remember: The bottom left of the form displays errors and warnings. This area is referred to as the auto-hint line and should be consulted if you are experiencing any problems. Even if you are not experiencing difficulties you should always keep an eye on this bar, especially if you are updating fields, as it provides important information such as warnings and errors that do not necessarily block your progress.

Accessing the "Person Matching Form" (SZQMTCH)

SZQMTCH cannot be accessed directly via the Direct Access field, but must be navigated to through the Person Search of form SZAEPAS.

The adjacent screen will appear:

Note: Numbers have been added to the adjacent form to help find and identify the different fields. These numbers correspond to the table below, which defines or explains each field's purpose.

In the table below, text inside { } brackets refer to Banner functions that are performed with buttons, menu items, or keystrokes.

Fields that have a red check mark (✓) in the **Req'd** column are required fields and need to be filled in with the appropriate data (see **Explanation/Description** column for details).

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
-------	---	-------	--------	----------	-------------------------	-----------------------

Received Data: This section displays the information for the chosen web or paper application, including web ID, SIN, name, gender, birth date, and permanent code. You can also display the various address types collected in the web application. In the block below you can access the Production Data and perform appropriate queries to determine whether the received data in this upper block matches any existing production data in the lower block.

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
	1.	ID			Applicant's web ID number. This will be either their web ID if they applied through unsecured web processing, or their Minerva ID if they applied through secured web processing.	
	2.	Last			Applicant's Last name.	
	3.	First			Applicant's First name.	
	4.	Middle			Applicant's Middle name.	
	5.	SIN			Applicant's Social Insurance Number.	
	6.	Term			Term code of the application.	
	7.	Appl No			Web Application sequence number.	
	8.	Former Name (Last)			Applicant's former legal last name.	
	9.	Former Name (First)			Applicant's former legal first name.	
	10.	Gender			Gender of the Applicant.	
	11.	Birth date			Applicant's date of birth.	
	12.	McGill ID			Previous McGill ID reported by applicant. Seven character legacy student numbers will have been converted to corresponding nine character Banner McGill IDs.	
	13.	Perm Code			Applicant's Quebec Permanent code.	

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
	14.	Address Type	Click on the radio buttons to display either the Applicant's Permanent, Mailing or Business address.		Address type. e.g. Permanent, Mail, Business	
	15.	Address			Street Address.	
	16.	City			City.	
	17.	Postal Code			Postal Code.	
	18.	State/Prov			State/Province.	
	19.	Country			Country.	
✓			Proceed to the Next Block by clicking the icon, or by pressing Ctrl + Page Down on your keyboard.			

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
--------------	----------	--------------	---------------	-----------------	--------------------------------	------------------------------

Production File: This section can be used to query data in the production database to determine whether the person for whom electronic data were received, matches an existing person in Banner. If a match exists, the database can be updated to reflect the match to the existing person.

Matching a Person:

When you access the **Production File section** of the form, the name information is brought in from the **Received Data section**, and query mode is invoked. You can change the data to perform a query as desired. Note you can query other fields such as SIN, Permanent Code, Birth Date and Gender as well as or instead of querying the name fields. After performing the desired query, you can scroll through the displayed information to determine whether any of the returned records match the data received.

The query defaults to non-case sensitive (compare Person Search Form GYASINS). The non-case sensitive search will ignore case, special characters, accents, and will consider Mc/Mac and St/Ste/Saint/Sainte as equivalent.

Note: When a query is executed for a person in the Production File section, and multiple identification records and/or address records exist in Banner, the Next and Previous Record functions will scroll among the existing identification and address records. After performing the desired query, you can scroll through the displayed information to determine whether any of the records match the data received.

If no production records appear to match the received data, you can invoke query mode and enter and execute a new query.

✓			Enter desired query criteria and execute the query by clicking on the icon or pressing F7 on your keyboard.			
	20.	ID			Person's McGill ID number (may or may not be their current ID).	
	21.	Last			Person's last name (may or may not be their current name).	
	22.	First			Person's first name (may or may not be their current	

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
					may not be their current name).	
	23.	Middle			Person's middle name (may or may not be their current name).	
	24.	SIN			Person's Social Insurance Number.	
	25.	Gender			Gender of the person.	
	26.	Birthdate			Person's date of birth.	
	27.	Perm Code			Permanent code (for latest term and sequence number).	
	28.	Address Type			Address type. e.g. Permanent, Mail, Business	
	29.	Address			Street Address.	
	30.	City			City.	
	31.	Postal Code			Postal Code.	
	32.	State/Prov			State/Province.	
	33.	Country			Country.	
	34.	Case Sensitive Query?	Leave as No for a non-case sensitive search, or click on Yes for exact matching.			Person Search Form (GYASINS)

<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
--------------	----------	--------------	---------------	-----------------	--------------------------------	------------------------------

MATCH FOUND:

If an existing person record is located in the Production File section that you are confident matches the applicant record, you can click on the **Match button** or use a Next Primary Key function to match the received data to the existing person. (Behind the scenes the existing person will be linked to the applicant by the creation of various table records that link the applicant's web id to their permanent McGill id.)

Warning: Be sure that you want to match to an existing person before performing this function, as it cannot be reversed once performed!

MATCH NOT FOUND:

If you do not locate a match, you can perform additional queries to attempt to locate the person for whom data were received. If you exhaust all possibilities, you can perform an Exit function to SZAEAPS, and then add the new person to SCT Banner by choosing the Create Person item in the Navigation Frame from the IDVR field on the Applicant and Application Manual Verification window.