

Performing a Search/Match

Overview

This process will define how to perform a Search/Match.

- The term “Search Match” refers to a search that is done if you are not sure if the person exists in SIS or whenever a new person is being added to the system. This search looks to see if there are any records already in the system that could be matches for the person being added. This process is used to prevent the creation of duplicate records in the system.
- You must first perform a Search/Match to confirm whether or not the person’s record exists in SIS.

Steps

Performing a Search/Match


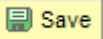
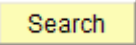
1. Navigate to: **Campus Community > Personal Information (Student) > Search/Match.**

Search/Match
Enter any information you have and click Search. Leave fields blank for a list of all values.


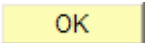
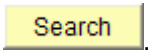
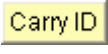
Find an Existing Value

Search Type: = Person
Search Parameter: begins with IUCC_ONLINE
Ad Hoc Search:
Description: begins with

Search Clear Basic Search Save Search Criteria

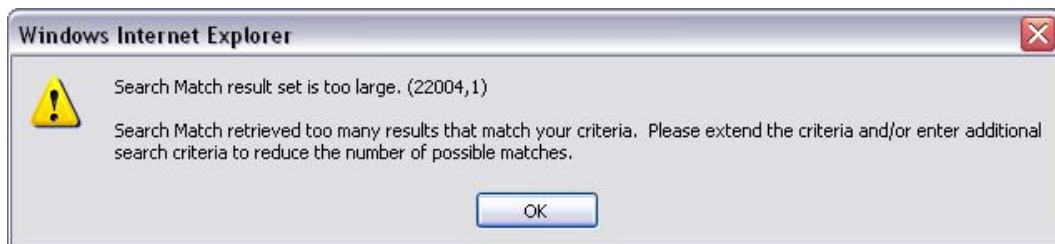
2. Select the **Search Type** of **Person**. This field may automatically populate.
3. Select the **Search Parameter** of **IUCC_ONLINE**. This field may automatically populate.
 - If the above fields do **not** automatically populate, you can set your User Defaults. You only need to set the User Defaults one time and then the fields will always populate with the selected defaults.
 - To set User Defaults:
 - a. Navigate to: **Set Up SACR > User Defaults.**
 - b. Select the *User Defaults 4* tab.
 - c. In the **Search Type** field, select **Person** from the drop down list.
 - d. In the **Search Parameter** field, click  and select **IUCC_ONLINE**.
 - e. Click .
4. Click .

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5. Select the **Search Result Code** of **IUCC_MASK_RSLT**. This field may automatically populate and is based on your security settings.
 - If the above field does **not** automatically populate, you can set your User Defaults. You only need to set the User Defaults one time and then the fields will always populate with the selected defaults.
 - To set User Defaults:
 - a. Click the User Default link in the **Search Result Rule** box.
 - b. Click  and select **IUCC_MASK_RSLT**. (This field is based on your security settings.)
 - c. Click .
6. Enter the first few letters of the person's first name in the **First Name Search** field and press the **Tab** key.
7. Enter the person's last name in the **Last Name Search** field and press the **Tab** key.
8. Click . You must **Tab** out of the fields above to enable the **Search** button.
 - If no match is found or you receive too many results, add more information to your search criteria.
9. All potential matches will be returned. Most customers will have multiple entries in the list because they have multiple name types (primary and preferred) in the system. Once you have located the student whose record you want to update, click  to carry the student's ID forward to the page where you need to update information.
Click the Detail link to view more Bio/Demo information about the student.

NOTE: It is critical that an exhaustive search be performed before creating a new record to prevent the creation of duplicate student IDs.

NOTE: If the number of unique IDs is 150 or more, you will receive the following message:



You will then need to enter more search criteria.

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Search/Match Best Practices

When doing a Search/Match, use the following best practices.

1. If you know the individual's **National ID** (social security number), perform a search using only the **National ID** field.
2. Perform a broad search in the **First Name** and **Last Name** fields by entering minimal information. Search on the first few letters (3-4 letters) of the first name and the first few letters (3-4 letters) of the last name.
3. Warning! Never do a search using just one letter in the **First Name** or **Last Name** field. It will return tens of thousands of results which can cause database errors and impact all users.
4. Enter as much data as you are provided. Then to avoid an unwanted level either remove a field of data or execute a specific Search level.
5. If the first or last name has characters that could be interpreted in more than one way then either enter up to the point of the discrepancy or enter the possible combinations. For example, enter "Ni" into the **Last Name** field, for a last name of Nichaus or Niehaus when the third character is not clearly written on a paper form.
6. If the first name is a common nickname or if the first name has common nicknames, perform the search for all nicknames. For example for Elizabeth there is Liz and Beth and Elisabeth as well as Elizabeth.
7. If you have a name and you are not clear which name is the first name and which is the last name; perform the search both ways. For example, suppose you receive a document where "Qian Jian" is entered as the name and you are not sure which name is the first name and which name is the last name. The best practice is to enter "Qian" as the **First Name** in one search and "Jian" as the **First Name** in the second search.
8. If you are given a city that contains a space or other special characters then enter up to but not including the space or special character or try the possible combinations with or without the space or special characters. For example with the city of La Porte try LaPorte and La Porte and Laporte or just La.
9. If an address can be written in more than one way, then enter as much as you'd like to search on. This is true for other fields as well (e.g. Last Name, City). For example if the address is 420 E 72 St 18K then it could also be 420 E 72nd St #18K.
10. The Search/Match Result page can be used to visually compare data not matched. For example if there is a match on level 50 and the address was provided then the address can be used to narrow the records returned on the Search/Match Result page.