

Introduction to Common Matching

One Common Matching rule has been set up in Banner for Financial Aid called NON-PERSON_MATCH. NON-PERSON_MATCH is used for manual (online) creation of non-persons records.

You may view additional addresses and telephone numbers by clicking on the arrow next to “All Addresses” and “All Telephones” for the highlighted record. The “All Addresses” and “All Telephones” fields are located just below the Matched or Potential Matched lines.

What are the possible results on GOAMTCH?


There are three possible results from a Common Matching duplicate search: New, Match and Potential Match.

New: No match found in Banner. New record can be created with information entered into GOAMTCH; Banner will assign a new PIDM.


Match: All or a portion of the information of the information entered in GOAMTCH matches information on an existing record. By double clicking on the Matched record, data can be entered into that existing record. Or, a new record may be created.

Potential Match: All or a portion of the information of the information entered in GOAMTCH matches information on several existing records. By double clicking on the one of the Potential Match records, data can be entered into that existing record. Or, a new record may be created.

What are the commonly used buttons on GOAMTCH?

Matching Source:  Person entry for Accounting

Matching Source Field with Dropdown Arrow: the Matching Source field with dropdown arrow is used to select a particular Common Matching Rule.

Generate ID 


Generate ID button: the General ID button is used to generate or create a new ID in Banner.




Next Block button: the Next Block button will move the cursor into and allow for entry into the next block or section of the form.

Duplicate Check 

Duplicate Check button: the Duplicate Check button initiates the Common Matching duplicate check process, in which information entered in Data Entry fields is matched against fields in existing records.

Select ID 

Select ID button: the Select ID button selects the highlighted ID so that it can be copied and carried over into other forms.

Create New 

Create New button: the Create New button is used to create a new record using the information entered in Data Entry fields on the GOAMTCH form.





Update ID button: the Update ID button is used to update the selected ID record with information entered in Data Entry fields on the GOAMTCH form.

How do you use Common Matching?

- 1) Log into Banner.
- 2) Perform a manual search for the person or non-person.

Non-person manual search:

- 2.1) Go to SOACOMP.
 - 2.2) Under the “Name” field, enter the non-person name or a portion of the non-person name using “%” as a wildcard. *For example, try typing in “%office%” under the “Name” field.*
 - 2.3) Execute the query by clicking on the  icon from the toolbar or by clicking on “Query,” then “Execute.” *For our example, all non-persons with “office” in their name will appear. If the desired non-person name appears, proceed to Step 2.4. If the desired non-person name does not appear, proceed to Step 3.*
 - 2.4) If the desired non-person name appears, double-click on the desired non-person name ID so that the entire ID is highlighted.
 - 2.5) Click “Edit.”
 - 2.6) Click “Copy.”
 - 2.7) Proceed to the desired form for entry, such as RPRLNDR.
 - 2.8) Click on the “Lender Code” field.
 - 2.9) Click “Edit.”
 - 2.10) Click “Paste.”
 - 2.11) Verify that the desired non-person is listed in the “Name” field. If the desired non-person name is listed in the “Name” field, proceed with data entry. **(End of Matching)** If the desired non-person is not listed in the “Name” field, go back to Step 2.1.
- 3) Go to SPAIDEN.
 - 4) Click the  icon from the toolbar. The GOAMTCH form will automatically appear.
 - 5) Click on dropdown arrow next to the “Matching Source” field.
 - 6) Click “OK.”
 - 7) Click the “Generate ID” button.
 - 8) Click the “Next Block” button.
 - 9) Under the “Data Entry” section, if you are creating a non-person record, enter the non-person name under the “Non-Person Name” field.
 - 10) Under the “Data Entry” section, enter information into the “Street Line 1” (AP type) and/or “Telephone” (AP type) fields, if applicable.
 - 11) Click the “Duplicate Check” button.
 - 12) If the result of the Duplicate Check is...
 - a. New, click “Yes” when “No matches found, create as new?” window appears. Continue with data entry on desired form. *Warning! Be sure to verify “New” status by performing a manual search in Banner (Step 2).* **(End of Matching)**

- b. Match, click “Select ID” button. *Optional, click “Update ID” button to update selected record with information entered into GOAMTCH form.* Continue with data entry on desired form, such as RPRLNDR. **(End of Matching)**
- c. Potential Match, (1) highlight correct record in “Potential Match” tab and then click “Select ID” button. *Optional, click “Update ID” button to update selected record with information entered into GOAMTCH form.* (2) Click “Create New” button. Continue with data entry on desired form, such as RPRLNDR. **(End of Matching)**