



Version	8.9
Document Generation Date	3/10/2009
Last Changed by	System Office
Status	Final

Using Search/Match

Concept

Search/Match is a tool used to locate person records or organization records in the database. It is especially important to perform a thorough search for an existing record before adding someone to the database, in order to prevent creation of duplicate emplids.

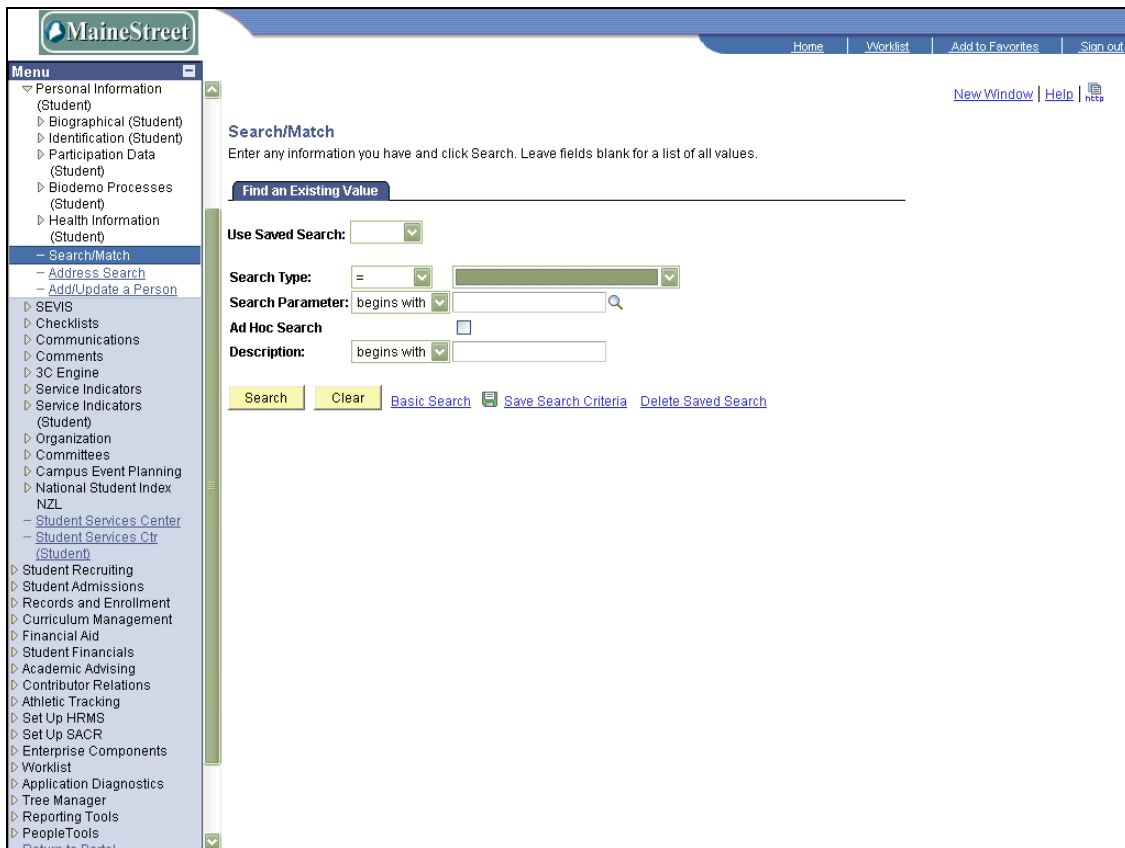
For Financial Aid, there are two scenarios where Search/Match is important: in ISIR suspense management and in entering guardian data for an undergraduate PLUS loan. Search/Match is an integral part of the ISIR load process. The system performs a specialized Search to determine if the individual is in the database. The search can fail for various reasons - mistyped NID, name variants, etc. If the ISIR suspends as a result of a search/match failure, the person performing suspense management can use the search/match tool to investigate the problem.

When entering data for an undergraduate PLUS loan, it is necessary to designate a guardian (to be the borrower), and the guardian must have an emplid. Before creating a database entry for the guardian (via the Add/Update a Person component in Campus Community), great care must be taken to check whether the person already has an emplid. Use Search/Match to perform this check.

Navigation



Step	Action
1.	<p>There are multiple ways to navigate to Search/Match. One way is to click the Search/Match link on the suspense management page of an ISIR in suspense. Another route is through Campus Community, which is used here.</p> <p>Navigate: Campus Community > Personal Information (Student) > Search/Match.</p>




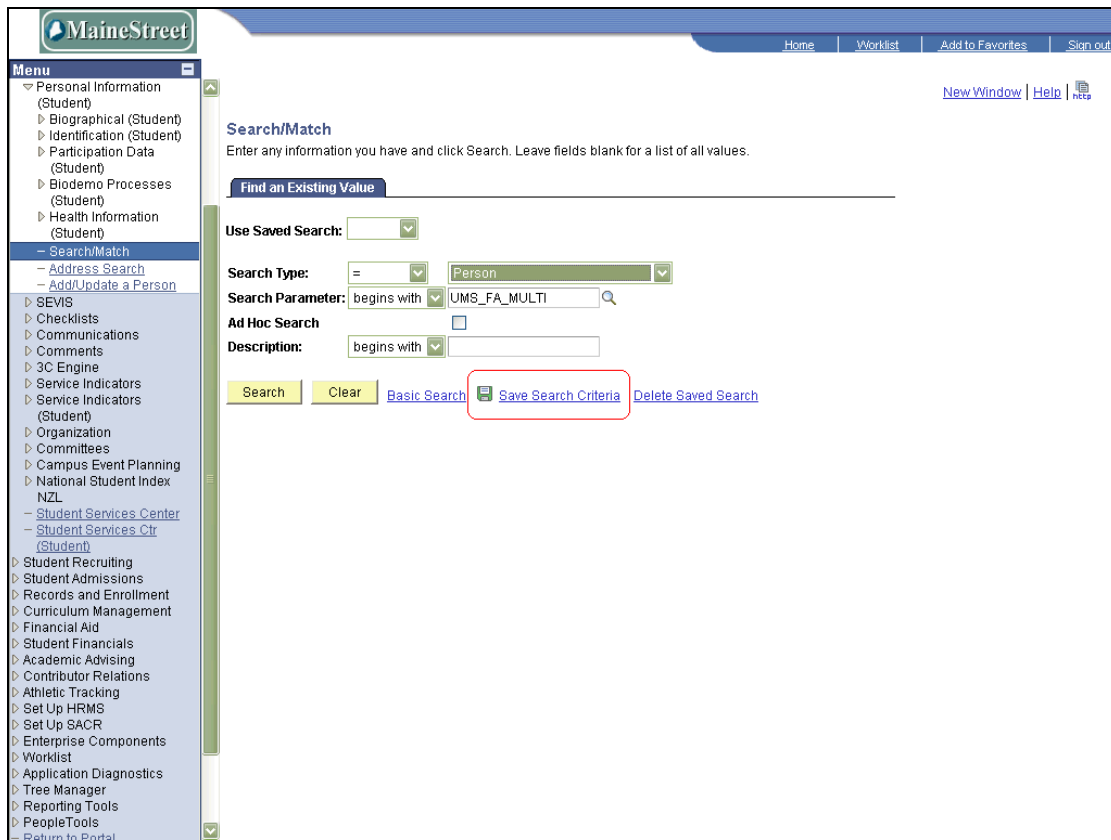
Step	Action
2.	Initially, you will not have any saved searches. To set up a search, click the Search Type pull-down list.
3.	In this list, the <i>Applicant</i> choice is not used. To search for a person, click the <i>Person</i> list item. <div style="border: 1px solid black; padding: 2px; width: fit-content;">Person</div>

Process Document

Financial Aid: Using Search/Match



Step	Action
4.	Click the Search Parameter look up button. 
5.	The search parameter sets shown in this list have different search criteria. The ISIR load process uses "UMS_FA_ISIR_1" or "UMS_FA_MULTI", depending on the Institution's set up. Another broadly used parameter set is "UMS_ONLINE."




Step	Action
6.	<p>Leave the Ad Hoc Search checkbox and the Description fields blank. To perform the search, you can click the Search button now. However, if you are going to use this search frequently, it is a time saver to save the search criteria so you don't have to enter the search type and search parameter choice each time.</p> <p>To save the criteria, click the Save Search Criteria link.</p>

Process Document

Financial Aid: Using Search/Match



Step	Action
7.	Enter the desired information into the Name of Search: field.
8.	Click the Save button. 



Process Document

Financial Aid: Using Search/Match

The screenshot shows the MaineStreet web application interface. On the left is a vertical menu with various categories and sub-items. The main content area is titled 'Search/Match' and features a section 'Save Search As' with the text 'Search saved as FinAid.' and a blue link 'Return to Advanced Search'. The top navigation bar includes 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. There are also links for 'New Window', 'Help', and 'Help' in the top right corner.

Step	Action
9.	Click the Return to Advanced Search link. Return to Advanced Search

Process Document

Financial Aid: Using Search/Match



MaineStreet Home Worklist Add to Favorites Sign out

Menu

- Personal Information (Student)
 - Biographical (Student)
 - Identification (Student)
 - Participation Data (Student)
 - Biodemo Processes (Student)
 - Health Information (Student)
- Search/Match
- Address Search
- Add/Update a Person
- SEVIS
- Checklists
- Communications
- Comments
- 3C Engine
- Service Indicators
- Service Indicators (Student)
- Organization
- Committees
- Campus Event Planning
- National Student Index
- NZL
- Student Services Center
- Student Services Ctr (Student)
- Student Recruiting
- Student Admissions
- Records and Enrollment
- Curriculum Management
- Financial Aid
- Student Financials
- Academic Advising
- Contributor Relations
- Athletic Tracking
- Set Up HRMS
- Set Up SACR
- Enterprise Components
- Worklist
- Application Diagnostics
- Tree Manager
- Reporting Tools
- PeopleTools
- Return to Portal

Search/Match [New Window](#) | [Help](#) |

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

Find an Existing Value

Use Saved Search: FinAid

Search Type: = Person

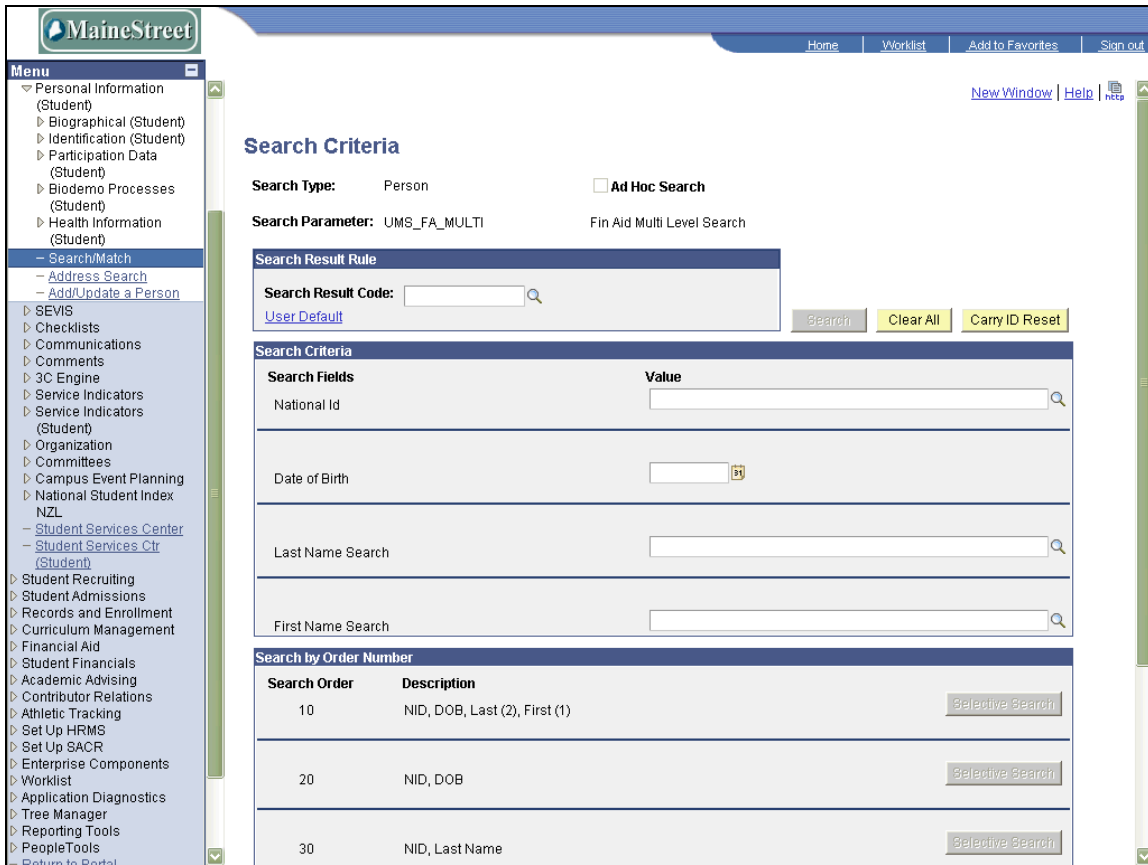
Search Parameter: begins with UMS_FA_MULTI

Ad Hoc Search:

Description: begins with

Search **Clear** [Basic Search](#) [Save Search Criteria](#) [Delete Saved Search](#)

Step	Action
10.	Now that the search has been saved, the next time you need to run Search/Match you can select from the Use Saved Search pull-down menu.
11.	Click the Search button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">Search</div>



MaineStreet Home Worklist Add to Favorites Sign out

New Window Help

Menu


- Personal Information (Student)
 - Biographical (Student)
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Search Criteria

Search Type: Person Ad Hoc Search





Search Parameter: UMS_FA_MULTI Fin Aid Multi Level Search

Search Result Rule

Search Result Code: 


[User Default](#)

Search Criteria

Search Fields	Value
National Id	<input type="text"/> 
Date of Birth	<input type="text"/> 
Last Name Search	<input type="text"/> 
First Name Search	<input type="text"/> 

Search by Order Number

Search Order	Description	
10	NID, DOB, Last (2), First (1)	<input type="button" value="Selective Search"/>
20	NID, DOB	<input type="button" value="Selective Search"/>
30	NID, Last Name	<input type="button" value="Selective Search"/>

Step	Action
12.	Click the Look up Search Result Code button. 

Process Document

Financial Aid: Using Search/Match



MaineStreet

Home | Worklist | Add to Favorites | Sign out

New Window | Help

Menu

- Personal Information (Student)
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Look Up Search Result Code

Search Type: Person

Search Result Code: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View All First 1-7 of 7 Last

Search Result Code	Description
PSCS_TRAD_MASK	CS Pers Traditional Result Mask
PSCS_TRAD_RESUL	CS Person Traditional Results
PSHR_GENERAL	General Core HR Results
PSRS_HIRE	Prepare For Hire
PS_GEN_W_EXCEPT	General Srch Rslt w exceptions
UMS_PERS_NOSEX	Person Search minus Gender
UMS_PERS_RESULT	Search-Match Person Result

Step	Action
13.	Use one of the last two choices in this list. <div style="border: 1px solid black; padding: 2px;"> UMS_PERS_NOSEX Person Search minus Gender UMS_PERS_RESULT Search-Match Person Result </div>

Search Criteria

Search Type: Person Ad Hoc Search

Search Parameter: UMS_FA_MULTI Fin Aid Multi Level Search

Search Result Rule

Search Result Code: JMS_PERS_RESU Search-Match Person Result

[User Default](#)

Search Fields	Value
National Id	<input type="text"/>
Date of Birth	<input type="text"/>
Last Name Search	<input type="text"/>
First Name Search	<input type="text"/>

Search by Order Number

Search Order	Description	
10	NID, DOB, Last (2), First (1)	<input type="button" value="Selective Search"/>
20	NID, DOB	<input type="button" value="Selective Search"/>
30	NID, Last Name	<input type="button" value="Selective Search"/>

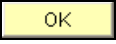
Step	Action
14.	To save the Search Result Code so you don't have to select it each time, click the User Default link. User Default

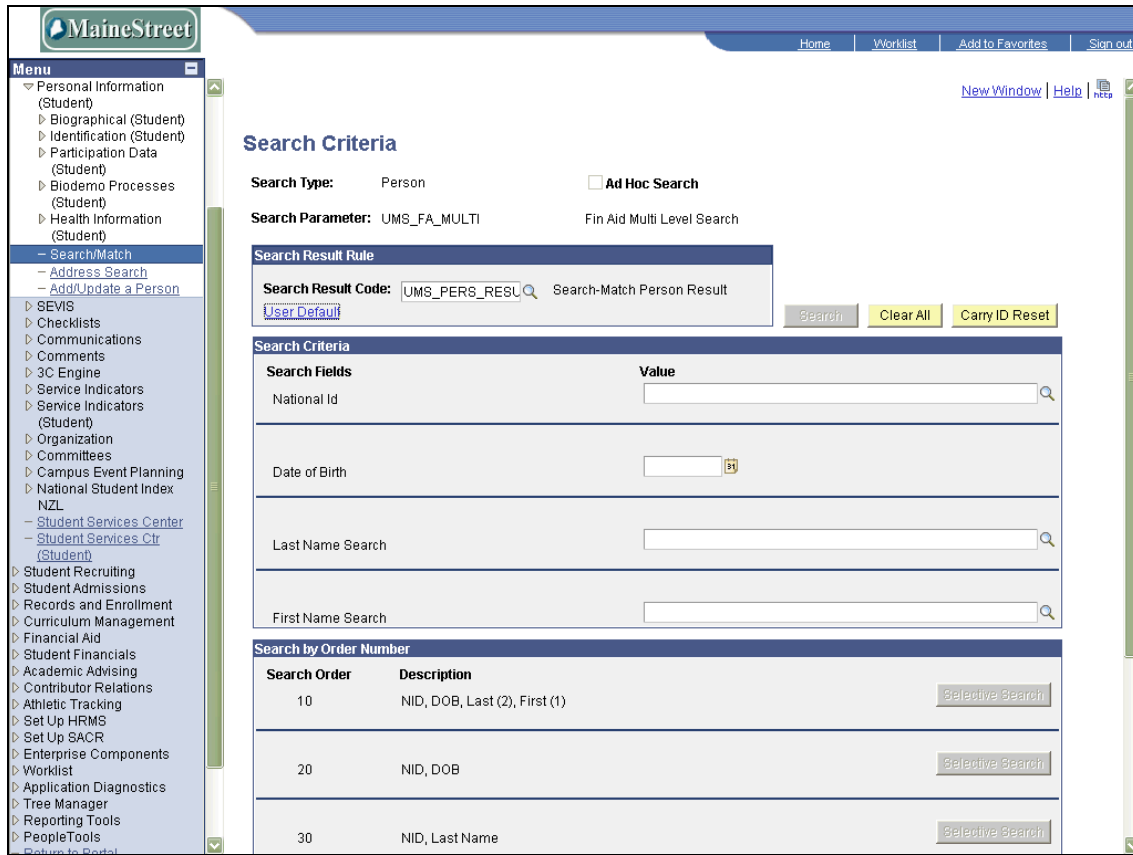
Process Document

Financial Aid: Using Search/Match



The screenshot shows the MaineStreet application interface. On the left is a navigation menu with categories like Personal Information, Search/Match, and SEVIS. The main area displays search criteria: User ID: 0088888, User: Ima Staffperson, Search Type: Person, and Search Result Code: JMS_PERS_RESUL. Below this are OK and Cancel buttons.

Step	Action
15.	Click the OK button. 



MaineStreet Home Worklist Add to Favorites Sign out

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- PeopleTools
- Return to Portal

Search Criteria

Search Type: Person Ad Hoc Search

Search Parameter: UMS_FA_MULTI Fin Aid Multi Level Search

Search Result Rule

Search Result Code: UMS_PERS_RESU Search-Match Person Result

[User Default](#) Search Clear All Carry ID Reset

Search Criteria

Search Fields	Value
National Id	<input type="text"/>
Date of Birth	<input type="text"/>
Last Name Search	<input type="text"/>
First Name Search	<input type="text"/>

Search by Order Number

Search Order	Description	Search
10	NID, DOB, Last (2), First (1)	Selective Search
20	NID, DOB	Selective Search
30	NID, Last Name	Selective Search

Step	Action
16.	<p>The Search button is grayed out because no search criteria have been entered. The choice of Search Fields shown is determined by the Search Parameter (in this example, UMS_FA_MULTI).</p> <p>To perform the search, enter whatever criteria you have in the Search Fields. Click the Tab key after entering data in a field.</p>
17.	Scroll down to see all the search fields.

Process Document

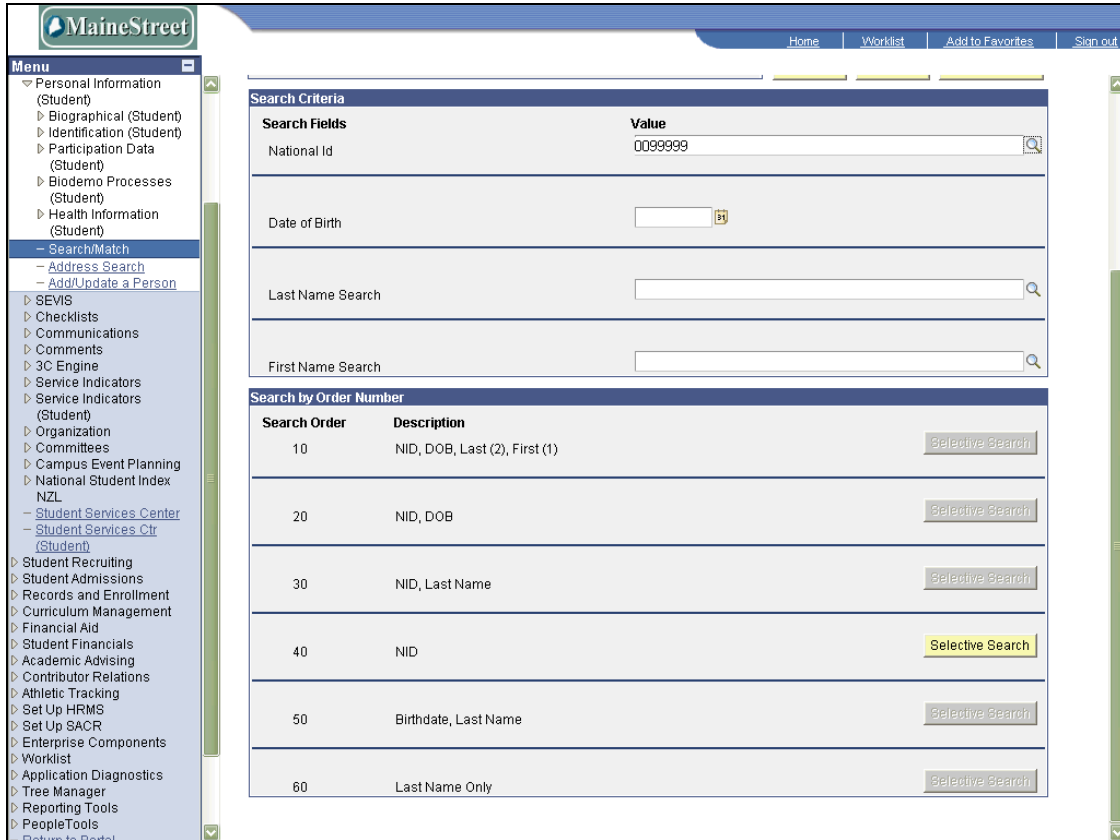
Financial Aid: Using Search/Match



The screenshot shows the MaineStreet web application interface. On the left is a navigation menu with categories like Personal Information, SEVIS, and Financial Aid. The main content area is titled 'Search Criteria' and contains several input fields: National Id, Date of Birth, Last Name Search, and First Name Search. Below this is a 'Search by Order Number' section with a table of search orders and their descriptions, each with a 'Selective Search' button.

Search Order	Description	Action
10	NID, DOB, Last (2), First (1)	Selective Search
20	NID, DOB	Selective Search
30	NID, Last Name	Selective Search
40	NID	Selective Search
50	Birthdate, Last Name	Selective Search
60	Last Name Only	Selective Search

Step	Action
18.	<p>The search parameters set chosen for this example includes 4 criteria: NID (SSN for the US), DOB (Date of Birth), Last Name and First Name.</p> <p>A person in the database will be found by the search if he/she satisfies any of the criteria combinations listed in the "Search by Order Number" area of the page.</p> <p>If all 4 criteria fields have data entered in them, the search starts with Search Order 10 (the criteria combination with the lowest search order number). If the student currently being considered fails that first test, the search continues with the next test (search order 20 in the example), and so on. If the student fails all the tests, he/she is not included in the search results.</p> <p>If some of the criteria fields are not populated, some of the search order tests cannot be performed. In the example, if there is no DOB entered, the first two searches will not be performed.</p> <p>When search/match is performed as part of the ISIR load process, the Suspense Management page will display which of the search order tests matched the student. In this example, if only the NID matched, the search is reported as successful at level 40.</p>



The screenshot shows the MaineStreet web application interface. On the left is a navigation menu with categories like Personal Information, SEVIS, and Financial Aid. The main content area is titled 'Search Criteria' and contains several search fields: National Id (with value 0099999), Date of Birth, Last Name Search, and First Name Search. Below this is a 'Search by Order Number' section with a table of search options.

Search Order	Description	Action
10	NID, DOB, Last (2), First (1)	Selective Search
20	NID, DOB	Selective Search
30	NID, Last Name	Selective Search
40	NID	Selective Search
50	Birthdate, Last Name	Selective Search
60	Last Name Only	Selective Search

Step	Action
19.	<p>For example, if the only search data you enter is the NID, then only one of the search tests can be used (in the example shown).</p> <p>If you view the bottom of this image, you will see that the only Selective Search button active is on level 40 (NID only). This means that when you click the Search button at the top of the page, only the level 40 test will be applied to search for students.</p>

Process Document

Financial Aid: Using Search/Match



Home | Worklist | Add to Favorites | Sign out

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- Return to Portal

Search Criteria

Search Fields	Value
National Id	<input type="text"/>
Date of Birth	<input type="text"/>
Last Name Search	THERIAULT
First Name Search	A

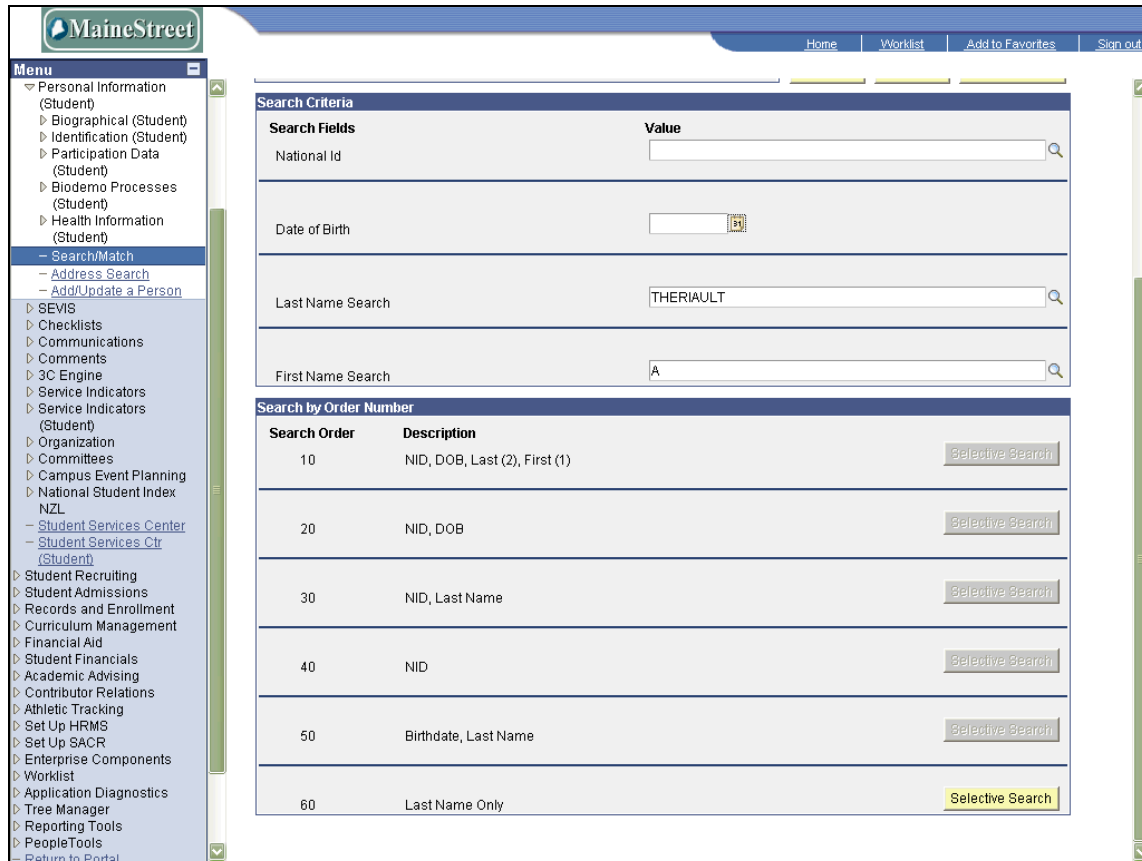
Search by Order Number

Search Order	Description	Selective Search
10	NID, DOB, Last (2), First (1)	<input type="button" value="Selective Search"/>
20	NID, DOB	<input type="button" value="Selective Search"/>
30	NID, Last Name	<input type="button" value="Selective Search"/>
40	NID	<input type="button" value="Selective Search"/>
50	Birthdate, Last Name	<input type="button" value="Selective Search"/>
60	Last Name Only	<input type="button" value="Selective Search"/>

Step	Action
20.	In this example, the last name and one letter of the first name have been entered. The only test that can be applied in this search is level 60: Last Name Only. Neither level 10 nor level 30 can be used because there is no NID or DOB. Level 50 can't be used because there is no DOB.

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The screenshot shows the MaineStreet web application interface. On the left is a navigation menu with categories like Personal Information, SEVIS, and Financial Aid. The main content area is titled 'Search Criteria' and contains several search fields:

- National Id: []
- Date of Birth: []
- Last Name Search: THERIAULT
- First Name Search: A

Below the search fields is a 'Search by Order Number' table:

Search Order	Description	Buttons
10	NID, DOB, Last (2), First (1)	Selective Search
20	NID, DOB	Selective Search
30	NID, Last Name	Selective Search
40	NID	Selective Search
50	Birthdate, Last Name	Selective Search
60	Last Name Only	Selective Search

Step	Action
21.	<p>To perform the search, you can either click the Search button at the top of the page, which will apply to each student all the active Selective Searches in order (low to high) until a match is found or all fail. Or you can choose to apply only one of the criteria combinations by clicking the corresponding Selective Search button, if the button is "live."</p> <p>In the example shown, only one Selective Search button is live. In this example, the Search button and the live Selective Search button do the same search.</p>
22.	<p>Click the Selective Search button.</p> 

Search Results

Search Type: Person Ad Hoc Search

Search Parameter: UMS_FA_MULTI Fin Aid Multi Level Search

Result Code: UMS_PERS_RESULT Search-Match Person Result

Search Results Summary [Return to Search Criteria](#)

Number of ID's Found: 476

Search Order Number: 60 Last Name Only

Results	Results2	Additional Information	EmplID	Last Name	First Name	Middle Name	Date of Birth	National ID
1	Carry ID	Detail	0099999	Therault	Aaa		12/24/1947	
2	Carry ID	Detail	0099999	Therault	Aaa		12/24/1947	
3	Carry ID	Detail	0089000	Therault	Bbb	M	10/07/1955	
4	Carry ID	Detail	0089000	Therault	Bbb	M	10/07/1955	
5	Carry ID	Detail	0088900	Therault	Ccc	L	05/24/1975	
6	Carry ID	Detail	0088900	Therault	Ccc	Laurel	05/24/1975	
7	Carry ID	Detail	0088900	Therault	Ccc	Laurel	05/24/1975	
8	Carry ID	Detail	0090000	Therault	Ddd	E	12/01/1979	
9	Carry ID	Detail	0090000	Therault	Ddd	E	12/01/1979	
10	Carry ID	Detail	0090000	Therault	Ddd	Elaine	12/01/1979	
11	Carry ID	Detail	0090000	Therault	Ddd	Elaine	12/01/1979	
12	Carry ID	Detail	0090000	Therault	Ddd	E	12/01/1979	
13	Carry ID	Detail	0090000	Therault	Ddd	E	12/01/1979	
14	Carry ID	Detail	0999000	Therault	Eee	T	06/11/1979	

Step	Action
23.	<p>The search results are displayed in emplid order. However, by clicking the title of a column, you can sort the results by that column. In the example shown the results have been ordered by first name (disguised for security reasons).</p> <p>Note that each person may have multiple entries in the search results. This is because there are usually multiple name entries in the database for each person.</p> <p>Click the Results2 and Additional Information tabs to see more information about the people in the search results. Click the Detail link next to an emplid to open the Add/Update a Person component for the individual.</p> <p>Click the Carry ID button next to a person to save the emplid for automatic insertion in search pages you may visit such as Packaging Status Summary.</p>
24.	End of Procedure.