New Procedures for Common Matching

BUid Conversion Project
11.20.2007
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Agenda

- What is the BUId?
- How does the BUId conversion affect processing of new person / non-person records?
- How can I find the BUId for a record?
- What happens if I enter the BUId and there is no match?
- Can I still search by SSN?
- How can I find records in Imaging?
- How can our internal customers who use BannerWeb find BUIds?
- What are some best practices for protecting confidential data such as SSN?
What is the BUid?

- It is the value assigned in the ID field of many Banner forms, including, but not limited to:
  - SPAIDEN
  - APAIDEN
  - PPAIDEN
  - FOAIDEN
- Formerly the value was SSN.
- After our ID conversion it will be a randomly generated ‘B number’.
- Current employees and students will receive their B number in a letter. They will also have the opportunity to receive an ID card sticker containing their B number.
- Here’s an example…
Timeline

- 11.XX.07 and ongoing – project training / communication.
- 11.26.07 – existing records have IDs converted from SSN to BUid, but they are not active in Banner yet.
- 11.26.07 – coordination of BUid communication begins (i.e., stickers and letters).
- 12.xx.07 – in early Dec letters are mailed to employees and students identifying their new BUid.
- 12.26.07 – ID’s that were converted from SSN to BUid on 11.26.07 are active in Banner.
- 01.xx.08 – stickers are available for pick up in various locations / dates / times on campus.
New Common Matching / Data Entry Procedures

- As of November 26, 2007, you will no longer use the SSN as the ID value in Banner.
- Instead you will press the Generate button to launch GOAMTCH to Create New (Records), Update (Existing) IDs, or Select (Existing) IDs.
- Here’s what it looks like…
YOU SHOULD ALWAYS SEE THE WORD "GENERATED" IN THE ID FIELD OF GOAMTCH. IF YOU DO NOT, THEN YOU SHOULD EXIT GOAMTCH AND REVIEW YOUR DATA ENTRY.
### Data Entry

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Jones</td>
</tr>
<tr>
<td>First Name</td>
<td>Frances</td>
</tr>
<tr>
<td>Middle Name</td>
<td>Adelme</td>
</tr>
<tr>
<td>Address Type</td>
<td>AD Admissions</td>
</tr>
<tr>
<td>Street Line 1</td>
<td>123 Saratoga Ct</td>
</tr>
<tr>
<td>City</td>
<td>Saint Francis</td>
</tr>
<tr>
<td>State or Province</td>
<td>AR</td>
</tr>
<tr>
<td>ZIP or Postal Code</td>
<td>72454</td>
</tr>
<tr>
<td>County</td>
<td>OUT Out of State</td>
</tr>
</tbody>
</table>

### Matching Source
- Matching Source: ADMISSIONS
- Enter or Update Prospect or Applicant

### Details
- Non-Person Name: 
- SSN/SIN/TIN: 409551210
- Birth Date: Day: 31, Month: 10, Year: 1972
- Gender: Female
- Telephone Type: AD Admissions
- Telephone: 555-555555
- E-mail Type: PERS Personal E-mail address
- E-mail: jonesfa@hotmail.com

### Duplicate Check
- Duplicate Check & Select ID

### Matching Rule Sets
- No Matches
Identifying Banner Records

- If you know the entity’s BUId then enter it.
  - If the value is located, then the name will appear.
  - If the value is not located, then you’ll either receive an error OR be taken to GOAMTCH.
    - IF YOU LAND IN GOAMTCH, THEN EXIT IMMEDIATELY.
- If you don’t know the entity’s BUId then you’ll search for it.
  - Query GUIALTI for the last 4 digits of SSN.
  - Or, search by name then reduce the search by looking for the last 4 digits of SSN.
- Here are some examples...
What happens when I enter BUId?

- BUId entered…
  - Value found, name displays
  - Value not found
    - Error generated OR
    - User taken to GOAMTCH
BUid entered, name appears
BUId entered, name does not appear, error generated
BUid entered, name does not appear, then...
...user is taken to GOAMTCH

IF THIS HAPPENS, THEN EXIT IMMEDIATELY
How can I search for BUId?

Option 1: GUIALTI
GUIALT1 is accessed, % and last 4 digits of SSN are entered in the SSN/SIN/TIN field, last name entered in the last name field, then execute query is performed.

<table>
<thead>
<tr>
<th>SSN/SIN/TIN</th>
<th>ID</th>
<th>Entity</th>
<th>Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>%1210</td>
<td></td>
<td>Jones</td>
<td></td>
</tr>
</tbody>
</table>

[Image of a database query interface with highlighted fields: SSN/SIN/TIN, ID, Entity, Last Name, First Name, Middle Name, Birthdate, Change.]
Desired record is highlighted, then user exits form
User is taken back to Main Menu where other forms can be accessed
After a new form is accessed the selected student appears in the ID field.
Special GUIALT Note

- It is accessible from the ID field LOV on many forms
- Click the drop down arrow next to ID
- Select Alternate ID Search, if available
- Query for your record
- Select the record needed
How can I search for BUId?

Option 2: Name search, last 4 of SSN search reduction
Searching based on name

- Access the desired form.
- Clear the ID field and press tab.
- Enter the name, use wildcard (%) if desired and press return.
- If the one match is found, then the BUId appears in the ID field.
- If more than one match is found, then the ID and Name Extended Search Window appears, allowing the user to either reduce the search or select the appropriate record.
- Reduce the search by entering % and the last 4 digits of SSN in the SSN field.
- Click the Reduce Search button.
- Select the matching record and return to the original form.
Record is located and appears in form’s ID field
Can I still look up by SSN?

- If you have the SSN and want to use it to identify a record then you can still do this.

But...

We **strongly discourage** the practice of asking customers for their **full SSN** in order to locate a record in Banner. Our efforts in the BUid conversion are to protect confidential information. Those efforts are weakened when students, employees, donors and/or alumni are asked by university agents to identify themselves by their full SSN.

- Here’s what it looks like…
What happens when I enter SSN?

- SSN entered…
  - Value found, name displays
  - Value not found
    - Error generated OR
    - User taken to GOAMTCH
SSN Entered, Record Found

- Access the Banner form needed (e.g., SADHOLD).
- Enter the SSN.
- Observe the SSN value you entered revert to the current BUid, the person’s name display and the hint line message in the lower left hand corner, “Warning SSN/SIN/TIN replaced with current ID.”:
SSN entered, name does not appear, error generated
SSN entered, name does not appear, then...
...user is taken to GOAMTCH

IF THIS HAPPENS, THEN EXIT IMMEDIATELY
Finding Records in Imaging

If BUId is known, enter it here.

If full or partial SSN is known, enter it here using the wildcard (i.e., asterisk, *) as needed.
What **not** to do…

- Ask a customer for his/her full SSN.
- Assign SSN as ID.
What to do…

- Review the ways you can identify records in Banner and decide which one works best for the situations you encounter daily.
- If the customer doesn’t know his/her BUid then ask for full, legal name and last 4 digits of SSN.
- On and following 11.26.07 be sure that you **always** press Generate ID when creating new records. This will create a B number (BUid) for the record.
- Recognize that during 11.26.07 and 12.26.07 new records will have BUids and records existing prior to 11.26.07 will have SSN as ID.
- After 12.26.07 all records will have BUids.
- Assign the SSN/SIN/TIN in the appropriate SSN/SIN/TIN field for your Banner module.
- If you enter a SSN or a BUid and Banner doesn’t find the value entered then you may be taken to GOAMTCH. If this happens exit immediately.
- Talk to others in your department about this project.
- Review our web sites regularly for updated information.
And… For our BannerWeb Users

- There are BUId look up screens offered online in BannerWeb to Advancement professionals, Faculty and Budget Managers.
- They’ll need full, legal name and last 4 of SSN to use the look up screen.
- If you service either of these internal customers and find that they have questions about how to locate a BUId then refer them to this document: http://campus.belmont.edu/acit/buid.htm
Protecting Confidential Data (1 of 2)

- If you don't need the SSN, delete it completely from any non-Banner databases and from any other electronic formats such as reports / lists.
- If you can't delete the SSN, consider masking it down to the last four digits.
- If you store hardcopy files with the SSN, make sure these files are in locked filing cabinets and / or in locked rooms.
- Limit access to electronic databases / files and hardcopy files only to faculty and staff that have a business reason to access the information.
- Password-protect desktop computers and laptops that have SSN stored on them.
Protecting Confidential Information
(2 of 2)

- Do not leave hardcopy files / reports / lists containing the SSN in a public area - this includes on a desk in an open office.
- Shred all hardcopy files / reports / lists containing SSN that are no longer needed.
- If electronic backups are created of databases that contain the SSN, these backups need to be stored in a secure location and password protected if possible. These should also be destroyed appropriately once the backup is no longer needed.
- Refrain from sending the SSN in an email or a fax. These can easily be intercepted or sent to the wrong address / number.
- If the SSN is sent off campus in an electronic format, it should be encrypted.
- Close software applications containing SSN, such as Banner, when they are not being used and/or when you leave your office area.
More Details and Help

- Read the Banner users’ document located @ http://campus.belmont.edu/acit/buid.htm & our public project site @ http://www.belmont.edu/acit/buid
- Review these sites regularly in the following weeks and after the first of the year.
- Email buid@mail.belmont.edu
- Call 460-5400. When this voice mail line is answered enter 1791, listen to the greeting and leave a message.
- We will return emails and phone calls promptly.