

Procedure for Fixing Multiple Person Records

When fixing person records in Banner due to multiple records for the same person, data must be moved from the person record to be deleted to the person record to be kept. The following procedures will be followed:

1. Go to GUIALTI (Alternate ID Search) or GUITINH (SSN History) & perform a search to identify if other multiple ids exist.
2. Go to GUASYST to see in what modules/areas data exists for the person. Note: the following is not specifically listed on GUASYST.
 - Admissions documents (SOAHSCH, SOAPCOL, SOAGPAT, SOATEST). Contact Ann Richards to verify whether admission documents exist.
 - International student data – If data exists on GOINTL, contact Esther Gunel in OIS.
 - Student AR data – if Registration is checked on GUASYST, contact Student Business Services to verify whether charges/payments exist.
 - Hold codes of “IT” and “PC” that appear on SOAHOLD. These codes indicate that there is an imaged academic record for a student. Contact Becky Kramer regarding any record with an ISIS (legacy student system) Alternate Id. These ID’s start with “000”.
3. If data is in one module/area, the responsible area should move all person data to one record and follow the procedures below under “Designate a Record to be Deleted”.
4. If data exists in more than one module/area, before any action is taken, contact the appropriate data steward(s) to determine the following: **(use a common subject line of “Merge ID” in e-mails to help expedite resolution of multiple records)**
 - Which person ID will be kept and which ID will be flagged as the record to be deleted.
 - Who will change the ID to an X-ID on the general person record (see step 3 under “Designate a Record to be Deleted”).

Then follow the procedures below under “Designate a Record to be Deleted”.

Notes:

- **Student AR transactions that exist with a User ID of “EMUCVT2” cannot be moved without creating duplicate transactions in Finance. Nothing should be done to these person records until this issue can be resolved.**
- **For procedures related to Finance/HR data that cannot be moved see procedures for “Designate a Record as a Permanent Duplicate”**

MODULE/AREA	DATA STEWARD RESPONSIBLE FOR HANDLING MULTIPLE IDs	CONTACT INFO
Advancement	Annette Rurka	annette.rurka@emich.edu 481-2326
Finance	Patty Mclean/Nannette White	Patty.Mclean@emich.edu 487-0022 Nannette.white@emich.edu 487-1200
Financial Aid	Elizabeth Eicher	elizabeth.eicher@emich.edu 487-0204
Human Resources (and Payroll)	Colleen Glaser - <i>Primary contact in HR – will notify other areas as necessary.</i>	colleen.glaser@emich.edu 487-5886
Student – Admissions/Recruiting	*Ann Richards – Admissions	ann.richards@emich.edu 487-8956
Student – GenStu/Registration/Faculty Assignments/AH/Transfer Data	*Becky Kramer – Records and Registration	becky.kramer@emich.edu 487-0094
Student – International Student Data	Esther Gunel – Office of International Students	Esther.Gunel@emich.edu 487-3116
Student AR	Carol Norton – Student Business Services	Carol.norton@emich.edu 487-0346

*Primary contacts for the Student Module. Primary contacts will notify other areas within Student if necessary.

Designate a Record to be Deleted

- **Each area is responsible for reviewing general person information to be sure all appropriate data exists or is moved to the good ID. It will be the responsibility of each area to move address/phone and alternate id data that they have ownership of.**

1. Move all data that needs to be moved for your module to the “good” record and delete this same data (as permitted by the system) from the record to be deleted.
2. Offices using Web Xtender need to re-index their imaged documents.
3. Using the appropriate *AIDEN and/or *APERS form(s) for your module (i.e. SPAIDEN, PPAIDEN, APAIDEN, etc):
(Remember – before changing or deleting any data, be sure the data exists under the “good” ID).

- Change the ID of the record to be deleted to “X” plus the last 8 digits of the ID number being kept. Example:
Duplicate records exist under E00001234 and E00004321
ID E00004321 – ID to be kept
ID E00001234 – ID to be deleted
ID E00001234 - Change to X00004321

If a person has two or more duplicate records, change the second position of the ID to an alpha character beginning with letter A. Example:

- Duplicate records exist under E00004321, E00001234, E00004567 and E00006789
ID E00004321 – ID to be kept
ID E00001234, E00004567, E00006789 – ID's to be deleted
ID E00001234 – Change to X00004321
ID E00004567 – Change to XA0004321
ID E00006789 – Change to XB0004321

- Name Type: add the Name Type of “DUP”.
 - Name: leave as is.
 - Alternate ID(s): Add the E-ID and any other alternate ID that belongs to your area to the good ID and delete them from the duplicate X-ID. Do Not delete any alternate ID's that belong to other areas. Leave these on the record for the other area(s) to move.
 - Address: delete
 - DOB: delete
 - SSN: DO NOT delete if person is an employee. If person is not an employee, delete SSN.
 - Citizenship, Ethnic code, Marital Status: delete
4. On SPACMNT – on the record to be deleted, add the appropriate Comment Type and Originator code for your office which indicates that this record has been reviewed, all appropriate data has been moved and the record can be deleted.
Note: Do not overwrite any existing comment codes. If a comment code(s) already exists on the record, perform a Record-Insert (F6) to add a new comment code..

Office Comment Codes:

DAD - Admissions
EAD – Xtender Adm Documents Moved
DAS – Advancement Services
DRR – Records & Registration
DHR – HR/Payroll
DFA – Financial Aid
EFA - Xtender FinAid Documents Moved
DSB – Student Business Services
DFI – Finance
DIS – Office of International Students

Originator Codes:

ADMS – Admissions
ADVS – Advancement Services
REC – Records & Registration
HRIS – HR/Payroll
FAID – Financial Aid
STAC – Student Accounting
OIS – Office of International Students
FINC – Finance

Designate a Record as a Permanent Duplicate

Used by Finance and HR to identify that a record is a permanent duplicate because data cannot be merged or moved either programmatically or manually, therefore, this record can never be deleted.

1. Move all data that can be moved for your module to the “good” record and delete this same data (as permitted by the system) from the record that should no longer be used.
2. Using the appropriate *AIDEN form for your module (i.e. PPAIDEN, FOAIDEN):

- Change the ID of the record that should no longer be used to “Z” plus the last 8 digits of the ID number being kept.
Example:

Duplicate records exist under E000001234 and E00004321

ID E00004321 – ID to be kept

ID E00001234 – ID no longer used

ID E00001234 - Change to Z00004321

- Name Type: add the Name Type of “DUP”.
- Name: leave as is.
- Alternate ID(s): Add the E-ID and any other alternate ID that belongs to your area to the good ID and delete them from the duplicate X-ID.
- Address: delete
- DOB: delete
- SSN: delete
- Citizenship, Ethnic code, Marital Status: delete