Search/Match

Before adding someone to PeopleSoft (for pre-employment or non-employee), always begin with Search/Match. Using Search/Match checks existing PeopleSoft entries to determine whether the person you want to add already exists in the database, which may be true for the following reasons:

• They are/were an active employee at the university, UHMC or Long Island State Veterans Home
• They are/were a student of the university
• They are/were an “affiliate” of the university (i.e., volunteer, temporary worker, visitor, etc.)

Correctly using Search/Match will prevent creation of duplicate entries for a single person. It is also very helpful to ask the person you are entering whether he/she ever did anything at the university.

Finding Search/Match in PeopleSoft

*Main Menu > Campus Community > Personal Information > Search/Match*

1. In the initial Search/Match Search Criteria page, do not enter anything; just click **Search**

2. If this is your first time using Search Match and the Search Result Code text box is empty

   a. For **Search Result Code**, click the magnifying glass/Lookup button

   b. In the Search Results, click on the Search Result Code to select it (PSHR_GENERAL in the image)
c. The Search Criteria options will display, but before searching, save the Search Result Code by clicking User Default in the Search Result Rule box (see image by step a above)

d. You should see the Search Result Code you selected. Click OK.

3. Search in 2 steps
   a. First, search by only National Id (social security number) by entering ss# or National Id in the National Id value box, hitting the Tab key on the keyboard, and clicking Search
   b. If there are no results, second, search by first and last name by entering them in the First Name Search and Last Name Search boxes, respectively, hitting the Tab key on the keyboard, and clicking Search

4. If you find a matching value(s), click on the Results2 tab to verify that you have an exact match by comparing the date of birth of the person you are entering with the date of birth of the match.

5. If there are no exact matches, you may add your new or non-employee.

6. If there is a match, write down (or copy) the Empl ID to use in other areas of PeopleSoft (for example, to add the person for Pre Employment or update his/her personal information, you'll need the existing EmplID to do so).

7. Alternatively, click Return to Search Criteria to search for another person.