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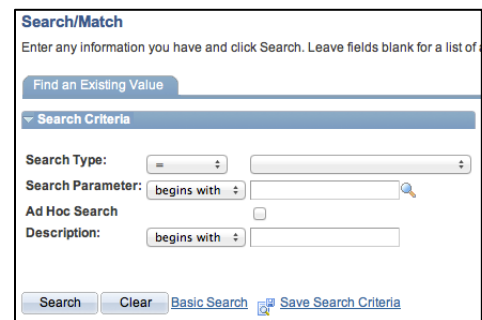
- They are/were an active employee at the university, UHMC or Long Island State Veterans Home
- They are/were a student of the university
- They are/were an "affiliate" of the university (i.e., volunteer, temporary worker, visitor, etc.)

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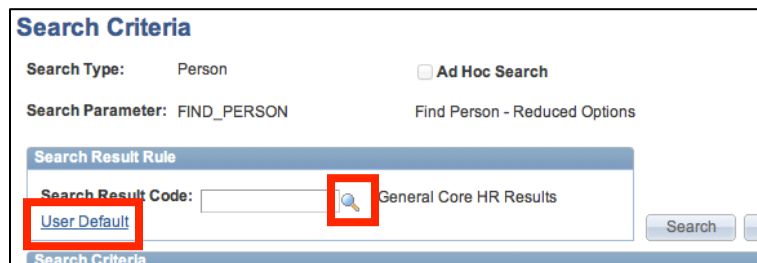
1. In the initial Search/Match Search Criteria page, do not enter anything; just click **Search**
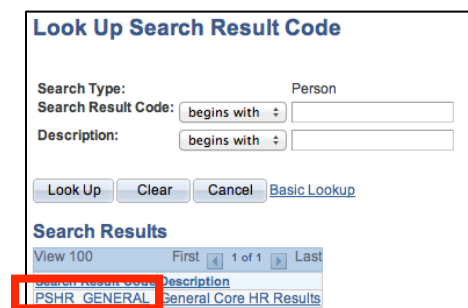

2. If this is your first time using Search Match and the Search Result Code text box is empty

   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 <u>**User Default**</u> in the **Search Result Rule** box (see image by step a above)

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

Search Criteria
Default Search Result

User ID:	HRDEPTCO	ROLE Coordinator (Dept)
Search Type:	Person	
Search Result Code:	PSHR_GENERAL 🔍	General Core HR Results

OK   Cancel

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,

Search Criteria

Search Type:	Person	☐ Ad Hoc Search
Search Parameter:	FIND_PERSON	Find Person - Reduced Options

Search Result Rule

Search Result Code: PSHR_GENERAL 🔍   General Core HR Results
User Default   Search   Clea

Search Criteria

Search Fields	Value
First Name Search	
Last Name Search	
National Id	123456789

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.

Search Results

Search Type:	Person	☐ Ad Hoc Search
Search Parameter:	FIND_PERSON	Find Person - Reduced Options
Result Code:	PSHR_GENERAL	General Core HR Results

▼ **Search Results Summary**   Return to Search Criteria

Number of ID's Found:	1
Search Order Number:	10 Name Only

Search Results   Personalize | Find | View All | 🔢   First ◄ 1-2 of 2 ► Last

Results | Results2 | Additional Information

		Empl ID	Name Type	Name Effective Date	First Name	Last Name	National ID
1	Carry ID	109074795	PRF	02/03/2014	Bob	Smith	*****6789
2	Carry ID	109074795	PRI	02/03/2014	Bob	Smith	*****6789