

SUNS Quick Reference Guide: Near Match Resolution

This quick reference provides a concise overview of the steps for resolving Near Match records. Users can view **SUNS Near Match User Guide** for more detailed guidance.

Overview	All Near Match records must be resolved before the user can continue to the next step in the ID Assignment process. Near Match records can be resolved by assigning an ID, creating a new ID, or by canceling the record(s). To resolve a near match, a user reviews the record and determines whether the submission record is either a match or not to any potential near matches. The following issues arise from poor near match decisions: Shared Identifiers - Matching a submission record to the wrong master record creates a shared identifier. Duplicate Records - Creating a new identifier for a person when there is a match will create a duplicate record. If either of these occur, the user will need to put in an e-ticket to have the issue fixed.
Resolve Near Matches	A. Home - Click the Resolve Near Matches button in the Next Actions column next to the batch that needs resolving. B. Near Match list page - Click the Review and Select button in the Next Action column or the hyperlinked name on the record to be resolved. C. Resolve Near Matches / Duplicates details page - The top section displays the submitted person and the bottom section displays the list of matching person records. Click a hyperlinked Last Name or First Name of a matching person record. D. Near Match Compare page – This page displays the field names in the left column, the submitted person information in the “Submission Record” column in the center, and the matching person information in the “Master Person Record” column on the right. • All fields in which the information differs between two person records is highlighted. • If a near match was forced by the application, the application will put the reason for the near match within the “Match Notes” row. This may



include a note about the Twins Rule, SSN Rules or other forced near match scenarios, if applicable.

1. Compare the Submission Record to the Master Record to determine if the submission record is a **Match** (Assign Selected) or is **Not a Match** (Create New ID).
2. **Match** - If the submission record matches the master record and the user has authorization to update the master data, the final field available on the Compare Person screen will be the Update Master selection. The default is “Yes” so users must make sure they want this option *before* clicking the Assign Selected button to create a match. Matching a submission record to the wrong master record creates a shared identifier as noted in the beginning of this section.
 - If a user selects “Yes”, the submission record will be assigned the same SUNS ID when the “Assign Selected” button is clicked and the master record data will be updated with the submission record information. When the master record is updated, the original data is moved to history so there is a record of that movement/update.

Do not overwrite the Master Record unless you are sure the uploaded data is correct.

- If a user selects “No”, the submission record will be assigned when the “Assign Selected” button is clicked, but the master data will not be updated with the submission record information. A history of the submission record will be created.

Click “Assign Selected” to assign the existing SUNS ID to the Submission Record.

3. **Not a Match** –If the submission record does not match the master record and there are no other Near Match records to review, click “Create New ID” and a new ID will be created for the submission record and all other near matches for the submission record are removed.
4. **Cancel Record** - If the record is not a match but there were other potential Near Matches, click “Cancel Record” to return to the Resolve Near Matches page and select another potential match.
5. **Return to List** - If the record might be a match but user is not positive, there are other near match records to review, or other input is needed to confirm, click Return to List.



Downloading IDs	Once the batch has been uploaded, errors fixed, data validation completed and near matches resolved, the home page will display the status of the batch as “ID(s) Assigned” and a “Download SUNSID” button in the Next Action column. Click the “Download SUNSID” button to get to the Download Batch page.
Reference	Detailed instructions on resolving near matches can be found in <i>Using the SUNS System Section C – Reviewing and Resolving Near Matches</i> of the SUNS User Guide. Detailed instructions on downloading IDs can be found in <i>Section D - Downloading IDs</i> of the SUNS User Guide.

Notes: