Avoiding Person Duplicates

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Office of Institutional Advancement
**Objective:** To improve the lookup and new person record addition process

1. Basic Person LookUp
2. Advanced Person LookUp
3. Tips for Adding New Person Records
4. Using Other Resources to Avoid Duplicates
5. How We Can Help Each Other
Overview

- Colleague vs. Benefactor
- Information Benefactor Stores on Person Records
  - Employment
  - Relationships
  - Academic Information (DeSales & Other Institutions)
  - Student Activities & Organizations / Awards
  - Scholarships
  - University Affiliations (Trustees, President’s Council, Alumni Council, Heritage Society, Solicitation Teams, Event Attendees, etc.)
  - Giving History
  - Communication Preferences
  - Cultivation Tracking
The Near Future: Colleague Advancement

As we look toward the future of sharing information, it is now even more crucial that we are all on the same page with our data!

Having duplicate person records containing different pieces of information instead of one record containing all the information, leads to inaccurate reports, mailing lists, data files, etc.
Basic Person LookUp

Enter Any of the Following at the LookUp Prompt

• ID #

• Name

  lastname (at least first two letters)
  lastname, firstname
  lastname, firstname middlenam
  lastname, firstname middleinitial
  firstname lastname
  firstname middlenam lastname
  firstname middleinitial lastname
  partial names
Basic Person LookUp

**Example:** to look up Jane Marie Doe, you could enter any of the following:

- do
- doe
- doe, jane
- doe, jane marie
- doe, jane m
- jane doe
- jane marie doe
- jane m doe

Be Aware!!! Using middle names or middle initials in your search will return results that match ONLY the first and last name qualifiers, so make sure you choose the correct record.
## Basic Person LookUp

### LookUp Examples

<table>
<thead>
<tr>
<th>Seq</th>
<th>Name</th>
<th>Address</th>
<th>SSN</th>
<th>Entry Date</th>
<th>Birth Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Mrs. Jane M. Doe</td>
<td>123 Main Street</td>
<td>123-45-6789</td>
<td>01/04/08</td>
<td></td>
</tr>
<tr>
<td></td>
<td>0731815, Active (1985,2000)</td>
<td>Center Valley, PA 18034</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Alumni (Smith)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Miss Sarah J. Doe</td>
<td>123 Main Street</td>
<td></td>
<td>01/04/08</td>
<td></td>
</tr>
<tr>
<td></td>
<td>0731818</td>
<td>Center Valley, PA 18034</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Family Member</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Basic Person LookUp

You can also use maiden name or other names for LookUp.
Basic Person LookUp

• **Multiword Names**
  Use an underscore between the parts of the name

![Person Lookup Window](image)

• **LookUp by Nickname**
  A person’s first name may be “William” but they go by “Bill”

  Other examples: “Jack” for “John”
  “Tori” for “Victoria”
Advanced Person LookUp

- **Limit a Name Search**

Enter any of the following after the name:

- ;c city ;c Allentown
- ;st state ;st NJ
- ;z zipcode ;z 18016
- ;f country ;f SWIT
- ;y class ;y 1974
- ;s source ;y PA
- ;ps status ;y U

**Application**

In the alumni office, one of our major gift officers might come to us and ask if a particular person he/she met at the annual Dinner Dance is in our database. If not, they would like them added to the database and put on the dinner dance invitation list. We are told the first name is “Richard or Robert or something that begins with an ‘R’ and the last name is ‘Smith’. Oh, and they live in Florida.”

***Typing out “Florida” will not work!!!***
Advanced Person LookUp

- Birthdate
- Phone Number
  ;ph 6101234567 (do not enter dashes)
- Sounds Like Toggle
  - Use if you’re not sure of the spelling /bosch
- Social Security
  ;ss 123456789

***Do NOT enter dashes!!!

Application

1) An alum calls and leaves a message requesting information. Their name is incoherent, but you were able to decipher their phone number.

2) A person calls up and leaves a message saying they would like information, leaves their name and social security number and says they attended DeSales 10 years ago. When you lookup their name, no records are found. You can use their social security number to see if the record exists. When you do, you find that the record exists under a different last name because there has been a name change.
Advanced Person LookUp

• Field Value

**Example 1:** ADDR.CHANGE.DATE.A35

;addr.change.date.a35 010708

**Application**
You changed an address on a record, but later that day discovered you changed the wrong record. You don’t remember which record you incorrectly changed, and need to find it!

**Example 2:** ADDRESS.LINES

;address.lines ...‘Oak Lane’...

You can lookup by the date the address was changed, or by the text in the address lines.

**Example 3:** PERSON.EMAIL.ADDRESSES

;person.email.addresses ...kmats1@...
CAUTION!!! When looking up records using field names...

Remember that text values, such as email addresses and address lines, are often case-sensitive.

- Incorrect LookUp: ;address.lines …main… OR ;address.lines …Main Street…

- Correct LookUp: ;address.lines …Main… OR ;address.lines …‘Main Street’…

- Incorrect LookUp: ;person.email.addresses …BOESCH@DESALES…

- Correct LookUp: ;person.email.addresses …boesch@desales…
CAUTION!!! When looking up records using field names...

Remember that field values are dependent on data that field is specified to pull.

**Example:** ADDRESS.LINES pulls on the address lines for the *preferred* address ONLY!!!
**LookUp Strings** - You can string together several LookUP Criteria

**Example:** Searching for an alum whose first name is “Robert” and who graduated in 1985, but don’t know his last name.

Remember: Knowing how to use LookUp in a variety of ways will cut down on possible duplicate records!!!
Tips for Adding New Person Records

• **Lookup 3 Different Ways Before Adding**
  Datatel recommends it…AND, it doesn’t take that much extra time!!!

• **Make Sure the Last Name & First Name Are in Correct Order**
  Entering “smith robert” without a comma after “smith” will result in a record being created with the first name of “Smith” and the last name of “Robert”

• **Make Sure Fields Are Filled Out Accurately**
  All it takes is one mistyped letter to keep a record from being “found” again!

  **Example:** If you were adding “Robert Smith” to the database but accidentally typed “Snith” instead of “Smith”, the LookUp would not find the record.
Tips for Adding New Person Records

• **Fill Out As Much Information As You Can**

  The more information, the easier it is to avoid duplicates!
Tips for Adding New Person Records

• Fill Out As Much Information As You Can

Prefixes (Dr., Rev., etc.) Can help in identifying one person from another
Tips for Adding New Person Records

• Fill Out As Much Information As You Can

FULL Middle Name
Not just the initial!
Tips for Adding New Person Records

- Fill Out As Much Information As You Can

Suffixes (Jr., Sr., M.D.) Can help identify one person from another.

Example: Fathers & Sons!
Tips for Adding New Person Records

- Fill Out As Much Information As You Can

**Nickname**
Some people use nicknames when filling out applications or surveys instead of using their first name. If the nickname is a less common nickname that can also be a first name (Tori for Victoria), this could result in a duplicate record unless the nickname field is filled out in BIO.

**REMEMBER:** Make sure nicknames are filled out in the “Nickname” field, NOT the “Other Names” field!
Tips for Adding New Person Records

• Fill Out As Much Information As You Can

Maiden & Other Names
DO NOT add a first or middle name WITHOUT the last name field being filled out! LookUp will not find any results without a last name in these fields.
Tips for Adding New Person Records

• Fill Out As Much Information As You Can

Social Security & Birthdate
Perhaps one of the best ways to avoid duplicate records. Names change constantly, but birthdates and social security #’s don’t change!

![BIO-Biographic Maintenance Form](image)
Resources for Avoiding Duplicates

• The Internet

Free Services:  www.whitepages.com
               www.superpages.com
               AMA DoctorFinder
               Lawyer Locator – www.martindale.com

Paid Services:  AlumniFinder
                LexisNexis

Example:  We are asked to add a “Dr. Robert Smith” from Allentown to the database. When we use the person LookUp, we discover that a “Dr. Robert Smith” already exists, but at a different address. Instead of adding a new person record or incorrectly changing the address of the existing record, we do some research to verify whether or not it is the same person.
# Resources for Avoiding Duplicates

- **The Internet - AlumniFinder**

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Address</th>
<th>Phone Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>MARY K NEALIS</td>
<td>1012 JUNIPER ST QUAKERTOWN PA 18951-1516 Apr 04 - Jun 07</td>
<td>(215) 523-9047 NEALIS MARY KATE</td>
</tr>
<tr>
<td>MARY K NEALIS</td>
<td>1012 JUNIPER ST QUAKERTOWN PA 18951-1516 Apr 04 - Jun 07</td>
<td>(215) 523-9047 NEALIS TOM</td>
</tr>
<tr>
<td>MARY K NEALIS</td>
<td>1012 JUNIPER ST QUAKERTOWN PA 18951-1516 Jul 04 - Nov 04</td>
<td>(215) 523-9047 NEALIS MARY KATE</td>
</tr>
<tr>
<td>MARY K NEALIS</td>
<td>1012 JUNIPER ST QUAKERTOWN PA 18951-1516 Jul 04 - Nov 04</td>
<td>(215) 523-9047 NEALIS TOM</td>
</tr>
<tr>
<td>MARY K NEALIS</td>
<td>1012 JUNIPER ST QUAKERTOWN PA 18951-1516 May 04 - Jun 07</td>
<td>(215) 523-9047 NEALIS MARY KATE</td>
</tr>
<tr>
<td>MARY K GLASS</td>
<td>2529 EDGEMONT ST PHILADELPHIA PA 19125-4003 Nov 00 - Jun 01</td>
<td>(215) 529-0047 GLASS MARY K</td>
</tr>
<tr>
<td>MARY K GLASS</td>
<td>2008 KINGSTON ST PHILADELPHIA PA 19134-2120 Aug 08 - Oct 00</td>
<td>(215) 529-0047 GLASS MARY K</td>
</tr>
<tr>
<td>MARY K GLASS</td>
<td>3540 JOYCE ST PHILADELPHIA PA 19134-2120 Mar 96 - Jan 99</td>
<td>(215) 529-0047 GLASS MARY K</td>
</tr>
</tbody>
</table>

We Also Found:  
- Property Records
- Purchase Results

Records: 1 to 9 of 9
How We Can Help Each Other

• Know Your Database
  Don’t add records blindly. If you cannot find a record that you think should already exist in the database, or you think you remember entering yourself, take some time to use some of these LookUp tips to try to find the record instead of creating a new one.

• Do Some Research
  If you need to add a record whose name matches one that already exists in the database but has a different address, use the internet to do some quick research! Taking a little time to make sure it’s accurate now will avoid spending LOTS of time to fix it in the future!
How We Can Help Each Other

• Search the Benefactor Database

When adding a new person record, you will receive the following prompt:

Click “YES”!!! This searches the Benefactor database for any possible matches and lists the results. If you find a match, Colleague will use the same ID number as the record in Benefactor and will pull over some of the biographic data as well. Having records share the same ID will help avoid duplicates when Benefactor converts to Colleague!!

REMEmBER: Only match a Colleague person to a Benefactor person if you are CERTAIN they are a match!
How We Can Help Each Other

• **Keep Us in the Loop!**
  If a current student or an alum calls or emails to change their information (such as address, name, birthdate, etc.) PLEASE let us know. This ensures that records are up-to-date across both databases, and creates less hassle for the students and alums who are trying to change their information.

Questions?