Reference Guide

One Analytics
Matching eStart and Capita One Records

eStart Matching

The One Analytics eStart Matching functionality is an ETL process that matches Capita One records to your eStart records for use within One Analytics. The process searches first for records with a matching ID, then for records that are exact matches across a set of core identifiers, and then it attempts to fuzzy match remaining records. If a single Capita One record is found that matches an eStart member record, the two records are classified as a match and paired together.

The fuzzy matching process used depends on the edition of SQL Server you are running. Where records are fuzzy matched or if multiple exact matches are returned, the records are stored for conflict processing using the eStart Matching utility within the One Analytics Console. If no fuzzy match can be made, eStart records are classed as unmatched. You can manually match eStart and Capita One records using the eStart Matching utility. This utility can also be used to break incorrectly matched record pairs and resubmit them for processing by the eStart Matching ETL.

Fuzzy matches are given a score indicating the likelihood of the two records belonging to the same person. In SQL Server Standard Edition, this is between 30 and 50, in SQL Server Enterprise Edition this is between 55 and 100. The lowest score is the similarity threshold, below which records are not considered as potential matches. The highest score indicates an exact match. For more information on the logic behind the matching process and the differences between the SQL Server editions, refer to the *eStart Matching* chapter in the *One Analytics Handbook*.

To access the eStart Matching utility:

1. Log in to the One Analytics Console using your Capita One username and password.

2. In the **Menu** tab on the left-hand side of the screen, click the **eStart Matching** button to display the **Manage Conflicts** screen. By default, the **Match Status** is set to display **Multiple Exact Matches**. To display fuzzy matches or unmatched records, select the appropriate option from the **Match Status** drop-down.
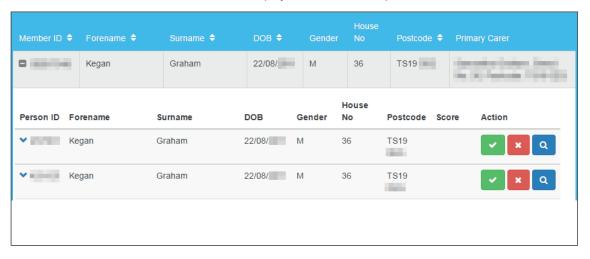
TIP: You can filter the records by ID, name or postcode using the search field above the **eStart Member record** table.

Processing Multiple Exact Matches

To process multiple exact matches:

1. Locate the required eStart member record in the table.

2. In the **Member ID** column, click the **+** icon to display the matched One person records.

3. Review the possible matches, and click the **Accept** button to select the correctly matched record.
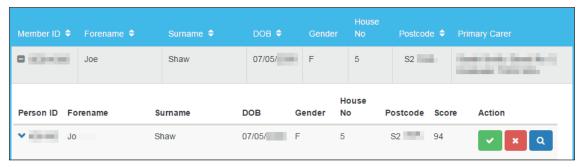
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Processing Fuzzy Matches

To process fuzzy matches:

1. From the **Match Status** drop-down, select **Fuzzy Matches**.

2. Locate the required eStart member record in the table.

3. In the **Member ID** column, click the **+** icon to display the matched Capita One records. Each potential match is given a **Score** to indicate the likelihood of it belonging to the same person as the eStart record.

Member ID ⇕	Forename ⇕	Surname ⇕	DOB ⇕	Gender	House No	Postcode ⇕	Primary Carer
▣ ░░░░	Joe	Shaw	07/05/░░	F	5	S2 ░░	░░░░░ ░░░░ ░░░░ ░░░░

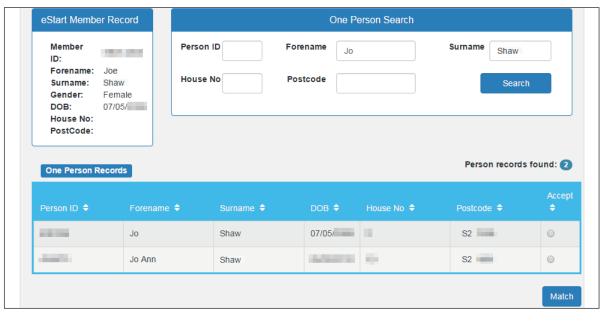| Person ID	Forename	Surname	DOB	Gender	House No	Postcode	Score	Action
⌄ ░░░░	Jo	Shaw	07/05/░░	F	5	S2 ░░	94	✔ ✖ 🔍

4. Review whether the two records belong to the same person or not, and action the match accordingly:

   - If the records <u>do</u> belong to the same person, click the **Accept** button to complete the match. This discards any other records, and the person is classed as matched.

   - If the records <u>do not</u> belong to the same person, and you want to discard the match so future eStart Matching ETL jobs do not attempt to rematch it, click the **Discard** button.

   - If the records <u>do not</u> belong to the same person and you want to manually search for the correct One person record, click the **Search** button to display the **One Person Search** screen where you can search for and accept the appropriate record.

Manually Searching for a One Person Record

When you access the **One Person Search** screen from an entry in the **eStart Member Record** table, the eStart Matching utility automatically performs a search using the **Forename** and **Surname** as recorded in the person's eStart member record. If the correct One person record is not returned by this search, you can manually search for it.

To manually search for a One person record:

1. In the **One Person Search** panel, enter your required search criteria and click the **Search** button to display the results in the **One Person Records** table.

eStart Member Record

Member ID: ░░░
Forename: Joe
Surname: Shaw
Gender: Female
DOB: 07/05/░░
House No:
PostCode:

One Person Search

Person ID [ ]   Forename [Jo]   Surname [Shaw]

House No [ ]   Postcode [ ]   [Search]

One Person Records   Person records found: 2

Person ID ⇕	Forename ⇕	Surname ⇕	DOB ⇕	House No ⇕	Postcode ⇕	Accept ⇕
░░░	Jo	Shaw	07/05/░░	░	S2 ░░	○
░░░	Jo Ann	Shaw	░░░░	░	S2 ░░	○

[Match]

2. Select the radio button in the **Accept** column for the required record.

3. Click the **Match** button to pair the records and return to the **Manage Conflicts** screen.

Processing Fuzzy Matches (cont.)

Bulk Accepting Fuzzy Matches

You can bulk accept fuzzy matches of or above a certain match score. Care must be taken when bulk accepting fuzzy matches because you cannot review individual cases. The highest scoring match is not necessarily the correct one, particularly if you are running SQL Server Enterprise Edition.

To bulk accept fuzzy matches:

1. Ensure the **Match Status** is set to **Fuzzy Matches**.

2. Scroll to the bottom of the screen and enter the required match score in the **Bulk match records with a match score >=** field.

									82, Postcode: TS19 9LY
«	<	1	2	3	4	5	...	›	»

Bulk match records with a match score >=	[ ]	Match

3. Click the **Match** button to display a confirmation dialog informing you how many matches will be accepted.

4. Click the **Yes** button to accept the matches and return to the **Manage Conflicts** screen.

Processing Unmatched Records

To process unmatched records:

1. From the **Match Status** drop-down, select **Unmatch**.

2. Locate the required eStart member record in the table and click the **Match** button to display the **One Person Search** screen.

3. In the **One Person Search** panel, enter the search criteria as required and click the **Search** button to display the results in the **One Person Records** table.

4. Select the radio button in the **Accept** column for the required record, and click the **Match** button to create the match and return to the **Manage Conflicts** screen.

Reprocessing Incorrectly Matched Records

To submit incorrectly matched records for processing:

1. In the One Analytics eStart Matching utility, click the **eStart Matching** menu button and select **Matched Records** from the drop-down to display the **Matched Records** screen.

2. Locate the required record in the table.

TIP: You can filter the results by name or other identifier using the search field above the table.

eStart Mnber Record							One Person Record							
Member ID ⇕	Forename ⇕	Surname ⇕	DOB	G... ⇕	House No ⇕	Postcode ⇕	Score ⇕	Person ID ⇕	Forename ⇕	Surname ⇕	DOB	G... ⇕	House No ⇕	Postcode ⇕	Discard
▨▨	John	Smith	22/08/▨	M	36	S1▨		▨▨	John	Smith	22/08/▨	M	36	S1▨	Reprocess

3. Click the **Reprocess** button to resubmit the name for processing.