

MIDAS 3.6 Release Notes

MIDAS 3.6 release includes changes to use only the last four digits of a person's SSN/ITIN instead of their full nine-digit number; enhancements to the Create Person process; and an Identity Resolution bug fix.

Impact:

1. Changes to the SSN/ITIN only affects MIDAS users with roles who are able to view, edit and/or search by a person's SSN/ITIN.
2. Enhancements to the Create Person process only affects MIDAS users with manager roles who are able to create a student, class-participant, POI or library borrower.
3. A minor bug fix only affects MIDAS users with roles that are able to perform Identity Resolution functions.

SSN/ITIN - Changed from full nine-digit number to last four digits only

In the near future the IAM registry will truncate a person's full nine-digit SSN/ITIN to only the last four digits after sixty days, as per OGB policy. Therefore, MIDAS functionality has changed to view, update, search, and add only the last four digits of a person's SSN/ITIN as follows:

Changes to MIDAS Functionality for View, Update, Search and Add SSN/ITIN

- MIDAS users who could previously **view** a person's full nine-digit SSN/ITIN are now presented with just the last four digits displayed in the person details section of the current profile page.
- MIDAS users who could previously **update** a person's full nine-digit SSN/ITIN are no longer able to do so from MIDAS. Changes/corrections to SSN/ITIN for students and employees should be made in the source systems, which will then update MIDAS. If the source system is MIDAS, and the display of a person's last four digits of their SSN/ITIN is incorrect, then a request should be made to ithelp@harvard.edu to correct the data.
- MIDAS users who could previously **search** by a person's full nine-digit SSN/ITIN in Advanced Search are now limited to searching by just the last four digits. Note that search results using SSN/ITIN will now most likely find multiple identities whose last four digits of their SSN/ITIN match the four digits entered, as opposed to finding just one identity when the full nine-digits were entered in the previous release.
- MIDAS users who can create identities may now **add** a person's last 4 digits of their SSN/ITIN as an additional identifier when creating the identity using Create Person in MIDAS. This is done automatically when the last four digits of a person's SSN/ITIN are included as part of the search information when creating a new identity.

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Enhancements to Create Person

Enhancements to the Create Person process were implemented to reduce the number of duplicate identities created and to make the process more intuitive. These include:

- a. A more accurate search method to determine if a person already exists in the identity registry.
- b. The MIDAS user is asked if they are sure they want to create a new identity instead of MIDAS automatically creating one when no match is found.
- c. The “Finish” buttons on intermediate screens were renamed to “Next” so that only the final review screen in the create person process has a Finish button in order to avoid confusion.

More Accurate Searching during Create Person:

During the Create Person process, the system search to determine if a person already exists in the registry is now more accurate. A new method was implemented that emphasizes exact and partial matching of a person’s name and birth date, as opposed to their SSN/ITIN. The results are given a match-rank number, and are listed in ascending match-rank order with the most probable matches listing first.

Steps for Enhanced Create Person Searching:

1. The MIDAS user selects **Create Person** from the top menu. Note: only MIDAS users with permission to create a person in the registry will see the menu option.
2. User selects the role type or school code, and enters any additional role information that is required.
3. User enters the person’s last name, first name, birth date and optionally the last four digits of their SSN/ITIN, and then selects the **Search** button.
4. If no potential matches are found, the user is presented with the person information that was entered. User checks to make sure all the information entered is correct, and if it is, then clicks the **OK** button to create a new identity in the registry for this person. Otherwise, the user selects the **Cancel** button and may want to refine the search information and search again.
5. If potential matches are found, MIDAS displays them in a list along with a match-rank for each. An Exact match-rank is shown at the top and partial matches are displayed according to their match-rank number, low to high. The lower the match-rank number, the *better* the probability that the identity listed is a match. See the next section “Match-Ranking Explained” for more information.
6. User selects the HUID of each potential match listed, based on their match rank, which displays the current profile of the identity.
7. User carefully examines the current profile of the potential match to determine if the person’s identity they are trying to create already exists in the registry.

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8. If the user determines that the potential match is indeed the same person whose identity they are trying to create, then they should not create a new identity. Instead, they simply update the existing identity by selecting **Add > Role** from the left menu on the current profile page.
9. If the user determines that the potential match is not the person they were trying to create, they select the “Back to Results” link at the top or bottom of the current profile page to get back to the list of potential matches.
10. If the user determines that none of the possible matches listed are the person whose identity they are intending to create, then they should proceed to create a new identity by selecting the **Create a different person** link.

All other steps after searching for an identity in the Create Person process remain the same, with one exception. If the MIDAS user entered the last four digits of the person’s SSN/ITIN as part of the search information when creating the identity, then it is automatically included as part of the new identity information. Reference the updated online Quick Guides for Creating a POI, Class Participant, Library Borrower, and Library Borrower Research Assistant for an explanation of the full Create Person process at iam.harvard.edu/hr.

Match-Ranking Explained:

The lower the match-rank number, the *better* the probability that the identity listed is a match to the person whose identity the MIDAS user is trying to create. The following explains how the match-rank number is determined.

- Only the first three characters of the first name are used in the match-rank calculation. For example, if the MIDAS user enters “Samantha”, then the search will consider Samantha, Sam, Sammy and Samuel to be a first name match in the calculation of the match-rank number.
- **Exact:** An exact match-rank is when all of the person’s information entered matched an identity in the registry; including the first name (first 3 characters), last name, birth date, *and* last four digits of their SSN/ITIN.

Note: If SSN/ITIN was not entered and everything else matched exactly, then the match-rank number is calculated as 5. This is the most common case.

- **Match Rank 1 through 7:** A strong possible match where the person’s information entered matched on the first name (first 3 characters) and/or last name; also matched on the birth date; and the last four digits of SSN/ITIN either matched, was not entered, or does not exist in the registry for the possible match listed.
- **Match Rank 8 through 12:** A possible match where the person’s information entered matched on the first name (first 3 characters) and/or last name; and also matched on the last four digits of the SSN/ITIN entered; but did not match on the birth date.

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- **Match Rank 13 through 16:** A weaker possible match where the person's information entered matched on the first name (first 3 characters); and also matched on the birth date; but *did not* match on the last four digits of the SSN/ITIN entered. If the last name matched then the ranking will be higher in this category.

OR

The person's information entered matched on the first name (first 3 characters) *and* last name; but did not match on the birth date; and the last four digits of the SSN/ITIN was not entered.

- **No Matches Found:** The search will not find any potential matches when *both* the first name (first 3 characters) and the last name of the person's information entered does not match any identities in the registry, even though the birth date and last four digits of the SSN/ITIN (if entered) may match identities in the registry.

OR

When *only one* element of the person's information entered (first 3 characters of the first name, last name, birth date, or last 4 digits of SSN/ITIN) matches identities in the registry.

Identity Resolution Bug Fix

- A fix was implemented to disallow the duplicate HUID from being the same as the valid HUID so that MIDAS users who are able to perform the Identity Resolution functions cannot inadvertently mark a valid HUID as a duplicate.

Known Defects

- MIDAS users may experience data integrity issues when updating multiple identities in separate tabs of the same internet browser. Best practice is to update one identity at a time and to view multiple identities in separate instances of the browser, or in separate browsers (e.g. Chrome, Internet Explorer, Firefox, and Safari).
- MIDAS users who enter the last four digits of a person's SSN/ITIN during the create person process cannot see the digits on the Review page unless they have privileges to view SSN/ITIN data. Instead the Review page displays dashes. Workaround is for users to ensure the last four digits of the SSN/ITIN was entered correctly by viewing it on the Person Details page before they reach the Review page.

*** If you have questions or to report a MIDAS issue, please email iam_help@harvard.edu