

EASTERN MICHIGAN UNIVERSITY™

DATA STANDARDS MANUAL

**PUBLISHED APRIL 1, 2011
AS VERSION 3.0.0**

**SUBSEQUENT VERSIONS TO BE PUBLISHED AS
VERSION 3.0.X**

NOTE: Any changes recommended for the data standards in use at Eastern Michigan University must be approved by the Data Standards Committee which consists of representatives from all Banner application areas. Approved changes will be reflected in a subsequent standards manual.

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1 General Use

1.1 *Special Characters*

The use of non-ASCII characters in Banner fields, including characters such as å, é, and ö, characters used in non-Roman alphabets, and technical symbols used in a variety of academic disciplines is not permitted.

2 Banner Name and ID Search

2.1 General

Before creating a person ID in Banner, a thorough name and ID search must be performed to ensure the person does not already exist in Banner and to avoid the creation of a “duplicate PIDM.” An appropriate procedure will be developed by each module. See the appropriate process team leader if you have questions.

2.2 Standards

A thorough search using the *OAIDEN and GUIALTI screens should be done before any addition of person records.

2.3 Procedures

The *OAIDEN search form allows you to search for a person using each or a combination of ID, Last Name, First Name and Middle Name fields. If the complete ID or name is unknown, you may also perform a wild-card search by inserting the wild card symbol “%” into any of the search fields. Check the radio button for “No” under the Case Sensitive Query question. (This has to be reset each time you refresh the form.)

Effective with the April 2002 release of Banner, a new form (GUIALTI) has been added for search by SSN capabilities.

2.4 Standard Change Record

| | |
|------------|--|
| 10/28/2002 | 2.2 Standards Added standards that searches should include *OAIDEN and GUIALTI screens before adding person records |
| | 2.3 Procedures Added information regarding the new GUIALTI screen available with the April 2002 release |

3 Banner ID

3.1 General

This standard defines how the ID will be established within Banner for each person and non-person based upon 'best practice' recommendations made by SCT.

The following forms are used to generate, create and change IDs. The form used depends upon the Banner module in use:

| <u>FORM NAME</u> | <u>BANNER MODULE</u> |
|------------------|--------------------------------|
| SRAQUIK | STUDENT/RECRUIT |
| SPAIDEN | STUDENT/FINANCIAL AID |
| PPAIDEN | HUMAN RESOURCES |
| FTMVEND | FINANCE ('non-person' vendors) |
| FOAIDEN | FINANCE ('person' vendors) |
| APAIDEN | ALUMNI/DEVELOPMENT |

3.2 Standards

3.2.1 Standards for Person ID

Person IDs can appear in six different formats. All new IDs created in Banner will use format 1.

Format 1:

A system assigned ID will be established for all persons the first time they are entered into Banner. This system assigned ID will be a nine-character alphanumeric field where the first character is an 'E' followed by 8 digits.

Example: E00001834

A system assigned ID will be generated for any person converted from a legacy system with the understanding that, at the time of conversion, the option will be available to store the legacy system ID as an Alternate ID in Banner. This recommendation is made with the understanding that:

- Banner allows the storage of multiple Alternate IDs
- All Alternate IDs are searchable, independent of name
- Persons will be able to use either their Banner ID OR an ID from a legacy system to conduct business in any Banner module
- Social Security Number is a searchable field, independent of name, in all Banner modules

Format 2:

Pre-Banner student numbers for enrolled students will be stored in Banner as alternate IDs. The old student number format is 9 digits with 3 leading zeroes.

Example: 000893124

Format 3:

Pre-Banner student numbers for prospective students (not admitted) will be stored in Banner as alternate IDs. The old student number format is 9 digits with the leading character being an alpha character.

Example: C04341243

Format 4:

Pre-Banner numbers from the Advancement Legacy System will be stored in Banner as Alternate IDs. The old advancement number format has a leading character 'R' followed by 8 digits. **NOTE: THIS ID SHOULD NEVER BE DELETED.**

Example: R00156472

Format 5:

The Admissions Web Application requires an applicant to create a user ID for use in accessing their application status on the web. When the applicant submits their application, it is pushed into Banner and is stored under either a generated Banner ID (if the person is new) or an existing Banner ID. The User ID the applicant created is stored as an Alternate ID and can be any format the student desires from one to nine characters.

Examples: BUGBABY A MONALISA3

Format 6:

Persons with multiple person records on Banner who are in the process of having their records merged will have one ID in format 1 (an 'E' ID followed by 8 digits). This is the ID that will be kept. Any other 'E' IDs for the same person will be changed to a nine-character format where the first character is an 'X' followed by the last 8 digits of the ID number being kept.

Example:

Duplicate records exist under E00001234 and E00004321
ID E00004321 – ID to be **kept**
ID E00001234 – ID to be **deleted**
ID E00001234 – changed to X00004321

If a person has two or more duplicate records, the second position of the 'X' ID will be an alpha character beginning with the letter 'A'

Example:

Duplicate records exist under E00004321, E00001234, E00004567 and E00006789
ID E00004321 – ID to be **kept**
ID E00001234, E00004567, E00006789 – IDs to be **deleted**
ID E00001234 – changed to X00004321
ID E00004567 – changed to XA0004321
ID E00006789 – changed to XB0004321

NOTE 1: Any new data should be added to the ID being kept.

NOTE 2: Data for this person that has not yet been merged to the ID being kept will appear under the 'X' ID

NOTE 3: Once all of the information has been moved to the 'E' ID, the 'X' ID will be deleted from the system

Format 7:

This ID format is used by Finance and HR to identify that a record is a permanent duplicate because data cannot be merged or moved either programmatically or manually; therefore, this record can never be deleted. Persons with multiple person records on Banner whose records cannot be merged will have one ID in format 1 (an 'E' ID followed by 8 digits). The duplicate record will be changed to a nine-character format where the first character is a 'Z' followed by the last 8 digits of the ID number being kept.

Example:

Duplicate records exist under E000001234 and E00004321
ID E00004321 – ID to be kept
ID E00001234 – ID no longer used
ID E00001234 - Change to Z00004321

NOTE: The Z-ID record is used for the purpose of data retention only. No new data should be added to this record. This record is not to be updated.

Format 8:

This ID format is used by Finance to identify a vendor record that was created, in error, as a person record with an EID. If data exists that cannot be moved, the EID will be changed to a 'Z' number (permanent duplicate) after the non-person vendor record is recreated with a Smart-ID.

The following format will be used for the Z'ID: Z00 + Smart ID (this ties the record back to the non-person vendor record). The Z-Smart ID record is used for the purpose of data retention only. No new data is to be added to this record.

3.2.2 Standards for Non-Person ID

Non-person IDs can appear in five different formats.

Format 1:

A 6 character Smart ID will be created for each non-person, except for financial institution entities acting in the capacity of financial aid lenders, guarantee agencies or servicers, using the schema described in section 2.3.2. This concept will allow users the ability to intuit a non-person ID with a greater than 90% accuracy rate. It will also enable a user to instantly differentiate a person from a non-person and will lead to immense efficiencies for the primary users of non-person codes.

Persons doing business with EMU with a tax ID number will be treated as a non-person and assigned a Smart ID as described in section 2.3.2. If such a person also conducts business with EMU as a person, they will also have a person record with an 'E' number ID. A social security number will only be recorded in the person record (and not in the non-person record) for persons acting in this dual capacity.

Format 2:

In the event the University owes money to a current student or employee who has died, payment cannot be made through their E ID. A Smart ID must be created for the deceased's final payment. The check must be issued "The Estate of _person's_____ name_____."

Format 3:

Special Banner IDs will be created for financial institutions acting in the capacity of 'lender' for financial aid purposes. An institutional entity acting as a financial aid LENDER will have a Banner ID equal to the institution's 6-digit lender code. These special Banner IDs are used strictly for financial aid purposes and may only be created by the Financial Aid Office. NOTE: A financial institution could have more than one lender code.

Format 4:

Special Banner IDs will be created for financial institutions acting in the capacity of 'guarantor' for financial aid purposes. An institution acting as a financial aid GUARANTOR will have a Banner ID equal to the institution's 3-digit guarantor code. These special Banner IDs are used strictly for financial aid purposes and may only be created by the Financial Aid Office.

Format 5:

Special Banner IDs will be created for financial institutions acting in the capacity of ‘servicer’ for financial aid purposes. An institution acting as a financial aid SERVICER will have a Banner ID equal to the institution’s 6-digit servicer code. These special Banner IDs are used strictly for financial aid purposes and may only be created by the Financial Aid Office.

WARNING: A financial institution may conduct business with EMU in several different capacities – as a non-person entity (non-financial aid business), as a financial aid lender and/or as a financial aid guarantor. These institutions will have multiple IDs in Banner. Be careful to use the correct ID when processing in Banner.

Example:

| Institution Name | Function | ID Type | Banner ID |
|------------------|---|------------------------|-----------|
| Comerica Bank | a bank | Format 1 – Smart ID | COMERI |
| Comerica Bank | financial aid lender serviced by Sallie Mae | Format 2 – lender code | 805979 |
| Comerica Bank | financial aid lender serviced by UniPac | Format 2 – lender code | 822660 |

3.3 Guidelines

3.3.1 Creating a Person ID

Before creating a person ID in Banner, a thorough name and ID search must be performed to ensure the person does not already exist in Banner and to avoid the creation of a duplicate PIDM. At a minimum, name, gender (not available is allowed) and ethnicity code (not reported is allowed) must be entered for all persons. If a social security number is available, it must also be entered. An appropriate procedure will be created for each of the following Banner modules: Student, Financial Aid, Finance, Human Resources and Alumni/Development (aka Advancement).

3.3.2 Creating a “SMART” Non-Person ID

“SMART” NON-PERSON ID CODES

A PROCEDURE FOR ASSIGNING A VENDOR CODE TO AN INDIVIDUAL FOR BUSINESS CONCERNS, PERSONAL SERVICES, PROFESSIONAL SERVICES OR ISSUING REFUNDS TO NON-STUDENTS

- Only capital letters or numbers will be used. Replace all other characters with a space.
 Example: AT&T Wireless or 3M Company
 Input as: ATTWI or 3MCOM
- Single character words concatenate with the word to the right, in order, left to right.
 Example: U-Haul International or B Young B Fit
 Input as: UHAINT or BYOBFI
- If two or more words are in vendor name, use up to the first 3 alphanumeric characters of the first two words in the vendor name:
 Example: Sigma Chemical Company
 Input as: SIGCHE

4. If vendor name is just one word, use up to first 6 alphanumeric characters:

Example: Departures or Inmac
Input as: DEPART or INMAC

5. If two different vendors have the same vendor characters, use numerical sequence to identify each succeeding vendor:

Example: Michie Company or Micron Computer
Input as: MICCOM or MICCOM1

6. If there are only two characters in the first name, use only those two characters:

Example: US Welding Inc
Input as: USWEL

7. Initials and Abbreviations – Vendors who use initials and abbreviations as their official corporate name will be input in the same manner:

Example: ABC Office Equipment or IBM
Input as: ABCOFF or IBM

8. In order to cut down on duplicate vendor numbers, any time a company name exists with the following as part of its name, drop for vendor number purposes only:

and of de
by the on
for at to

Example: Films for the Humanities or Rain for Rent Inc
Input as: FILHUM or RAIREN

Example: The Wood Doctor
Input as: WOODOC

9. While person and non-person searches are conducted separately, Banner stores the IDs in the same table. Because of this, Banner will not allow manually generated ID numbers to begin with the same character as computer-generated ID numbers (persons in Banner have computer-generated numbers). There is, therefore, an exception for vendors whose name begins with the letter 'E'. The computer-generated numbers begin with 'E' (for EMU 'E' number). Vendors whose name begins with an 'E' will have their Smart ID start with an 'X' in the first character and then the normal 6 characters according to all the other rules listed above:

Example: Evan's Office Equipment or EMC Computer Corp
Input as: XEVAOFF or XEMCCOM

10. For all vendors with the prefix "Ann Arbor" in its name, use A2 to represent Ann Arbor and follow with the first three characters of the third word in the name. If two vendors have the same characters beginning the third word in their name, use a numerical sequence number to identify each succeeding vendor.

Example: Ann Arbor Commerce Bank or Ann Arbor Community Center
Input as: A2COM or A2COM1

11. A W-9 (or approved substitute) must be presented with the request before the vendor record can be created to ensure accurate information.

| | | |
|------------------|----------------------------|----------------------|
| Requisition Info | W-9 Information | FTMVEND Banner Setup |
| Becky White | Rebecca White | Smart ID: REBWHI |
| John Smith | John Smith | Smart ID: JOHSMI |
| John Smith | John Smith (different SSN) | Smart ID: JOHSMI1 |

12. All SMART IDs will be created in compliance with paragraphs 1 through 11 above. The website (currently <http://www.emich.edu/bss/vendorsmartid.php>) provides a vendor name conversion utility. The SMART ID string will be checked against existing SMART IDs and a one up number appended if necessary. Should this SMART ID be found unacceptable at any time after it is included as the ID for a vendor, the ID may be changed to a preferred ID. The Banner will then use the original ID as an alternate.

Note: Included in this proposal, is the creation of a website (<http://www.emich.edu/bss/vendorsmartid.php>) to accept vendor names and create "SMART" IDs following the above standards. All existing IDs would be adjusted to follow the above standards (except Z IDs).

3.3.3 Creating a Non-Person Financial Aid Lender ID

A six-character lender code number supplied by the U.S. Department of Education, Institutional Participation and Oversight Service, will be used to create each financial aid lending institution. The lender code number should be entered into the first six spaces of the nine-digit ID field. The Office of Financial Aid will be responsible for creating these IDs.

3.3.4 Creating a Non-Person Financial Aid Guarantor ID

A three-character guarantor ID number supplied by the U.S. Department of Education, Institutional Participation and Oversight Service, will be used to create each financial aid guaranty agency. The guaranty agency number should be entered into the first three spaces of the nine-digit ID field. The Office of Financial Aid will be responsible for creating these IDs.

3.3.5 Creating a Non-Person Financial Aid Servicer ID

A six-character servicer code number supplied by the U.S. Department of Education, Institutional Participation and Oversight Service, will be used to create each financial aid loan servicer. The servicer code number should be entered into the first six spaces of the nine-digit ID field. The Office of Financial Aid will be responsible for creating these IDs.

3.4 Standard Change Record

| | |
|------------|---|
| 08/05/2002 | 3.3.1 Creating a Person ID Clarified that name and gender must be entered for all new persons in Banner. SSN, if available, must also be entered |
| 10/28/2002 | 3.3.5 Creating a Non-Person Financial Aid Servicer ID Section added |
| 10/13/2004 | 3.2.1 Standards for Person ID Added examples 4, 5, 6 |

| | |
|------------|---|
| 02/22/2006 | 3.1 General Removed reference to form RPAIDEN |
| | 3.2.1 Standards for Person ID Changes to wording and added Format 7 |
| 06/13/2007 | 3.3.2 Creating a "SMART" Non-Person ID Added Section 14 |
| 04/09/2008 | 3.2.1 Standards for Person ID Added Format 8 |
| 02/25/2010 | 3.3.2 Creating a "SMART" Non-Person ID Rationalized and revised entire 2.3.2 |

4 Names

4.1 General

The University considers the 'current name' in Banner as a person's legal name. A person's legal name appears on official documents such as a birth certificate, court order, social security card, marriage license or passport. The Office of Admissions uses the name reported on an application as the legal name.

Names for persons and non-persons should have a customer friendly appearance. The objective is to enter names and addresses with both upper and lowercase letters so that when a name is printed on correspondence, it looks contemporary and professional. Name formats have also been developed to meet postal regulations.

It is recommended that offices that collect person names on applications, or any other types of forms, designate separate fields on the form for that person to indicate first name, middle name and last name. This will facilitate our ability to enter a name correctly into the respective fields in Banner.

The following forms are used to enter and change name information. The form used depends upon the Banner module in use:

| <u>FORM NAME</u> | <u>BANNER MODULE</u> |
|------------------|--------------------------------|
| SPAIDEN | STUDENT/FINANCIAL AID |
| PPAIDEN | HUMAN RESOURCES |
| FTMVEND | FINANCE ('non-person' vendors) |
| FOAIDEN | FINANCE ('person' vendors) |
| APAIDEN | ALUMNI/DEVELOPMENT |

Last Name, First Name and Middle Name appear on all of the above forms.

Prefix, Suffix and Preferred First Name appear only on SPAIDEN, PPAIDEN and APAIDEN.

Person Last Name – maximum length 60 characters
Person First Name – maximum length 15 characters
Person Middle Name – maximum length 15 characters

Non-Person Name – maximum length 60 characters

4.2 Standards

Enter the last, first and middle names exactly as the person has indicated. If given the full middle name, enter the full middle name. Do NOT change a full name to an initial. Always use normal upper- and lower-case letters for names. One exception is the **GIFT_SOCIETY_NAME** field in the Advancement module, which may be formatted and punctuated as necessary.

4.2.1 Case

If a person has written all upper-case letters, enter the normal upper- and lower-case letters. If the person's name starts with a lower-case letter, enter the first letter in lower case.

Example: duBois

For externally obtained data feeds, ICT will convert the names into an upper- lower-case format based upon these rules.

4.2.2 Initials and Abbreviations

Do not use periods after initials or abbreviations.

Pamela A. Humphrey
Enter as: first name = Pamela / middle name = A / last name = Humphrey

Leslie M. F. Donner
Enter as: first name = Leslie / middle name = M F / last name = Donner

James St. Martin
Enter as: first name = James / middle name = blank / last name = St Martin

D. Gary Smith
Enter as: first name = D Gary / middle name = blank / last name = Smith

NOTE: Some, but not all, forms in Banner will display whatever is stored in the name field, followed by a period. If a period is entered in a name field, then you will see 2 periods on the Banner form. As periods are not to be entered in name fields (see 3.2.7), double periods should only be seen in cases where errors have been made.

4.2.3 Persons with Two or More Given Names

In cases where a single character is designated as the first name followed by a full middle name, place the single character and the middle name in the First Name field.

Example: W Mark Jones
Enter as: first name = W Mark / middle name = blank / last name = Jones

If you later receive information that the 'W' stands for William, change the name in Banner to:

first name = William / middle name = Mark / last name = Jones

If a person has more than two given names, and has not specified which are considered first vs. middle name(s), enter the first two names into the First Name field and any other names into the middle name field.

Example: Anne Marie Susan Smith
Enter as: first name = Anne Marie / middle name = Susan / last name = Smith

Example: Billy Joe Daryl Thomas Miller
Enter as: first name = Billy Joe / middle name = Daryl Thomas / last name = Miller

Upon request, it is acceptable to enter two names in the first name field.

Example: Anne Marie Smith
Enter as: first name = Anne Marie / middle name = blank / last name = Smith

4.2.4 Spaces in Last Names

Maintain spaces in last names (one space maximum) exactly as reported by the person.

Examples:

Van Buren Van der Vaart Vander Vaart

4.2.5 Long Names

If a person's first, middle or last name is longer than the field allows in Banner, enter as much as you can into the field. The rest will be truncated.

4.2.6 Persons with One Name

It is common in some countries for persons to just have one name (not a first, middle and last name). If that is the case, enter the person's name into the LAST NAME field and enter an asterisk (*) in the FIRST NAME field.

4.2.7 Punctuation

Use hyphens, apostrophes or dashes exactly as the person indicates in writing. Do not use commas or periods in any name field. Do not add punctuation where there is none. In the following examples, any could be correct:

| | | | | |
|-------------|-----------|-----------|-------------|-------------|
| O'Donnell | Odonnell | | | |
| Dell'Acqua | DellAcqua | Dellacqua | | |
| Jones-Smith | | | | |
| Al-Hassan | AlHassan | al-Hassan | alHassan | al Hassan |
| St Denis | StDenis | St-Denis | SainteDenis | Saint-Denis |
| Saint Denis | | | | |

4.2.8 Prefixes and Suffixes

Salutations (such as Dr, Rev, Mr, Mrs, Ms, etc.) are considered prefixes and should be entered in the PREFIX field on General Person Forms. A prefix is required for all persons defined in Banner if the person's gender is known or if the person has an indicated preferred prefix. (Exceptions can be made if person requests no prefix be used.) Prefixes will be entered in upper/lower case with no punctuation (see section 13).

Input Mr for males or Ms for females if no preferred salutation is indicated.

Professional status indicators (such as MD, DO, PhD, DVN, ESQ, etc.) are considered Suffixes and should be entered in the SUFFIX field on the General Person forms (see section 14).

DO NOT include any punctuation with a prefix or suffix.

Example:

| | | | | | |
|------------|-----|-----|-----|------|-------|
| correct: | Mr | Ms | Dr | MD | PhD |
| incorrect: | Mr. | Ms. | Dr. | M.D. | Ph.D. |

DO NOT enter prefixes or suffixes in the name fields of the current identification block on the Banner IDEN forms.

NOTE: Generational indicators (such as Jr, II, III, etc.) are NOT considered a suffix and should be entered in the last name field of the current identification block on the Banner IDEN forms. Enter a space after the last character of the last name, followed by the generational designator.

Example:
Jones Jr
Buckingham III

4.2.9 Previous Names

With the exception of corrections made due to data entry errors, it is our policy to maintain previous name information in Banner. Forms used by some University offices ask for a person's previous name or names (for example, admission applicants). Enter the earliest name first:

Example:

Name: Lee Livingstone
Previous Name: Lee Stanley

Enter previous name (Lee Stanley) and save.
Enter current name (Lee Livingstone) and save.
Previous name will appear in the alternate identification block.

4.2.10 Legal Name

The 'Current Name' field in Banner is considered the legal name. The Preferred First Name field is used for variations to the legal name.

The Legal Name Field is NOT used or maintained by the University.

DO NOT add, delete or modify any data in this field.

4.2.11 Preferred First Name

Offices may enter a name in this field.

Examples:

Current Name: William Knight
Preferred First Name: Bill

Current Name: D Mark Williams
Preferred First Name: Mark

Note: Preferred first name is considered for 'informational use' only. It is not used in SCT Banner reports supplied with the system, but is available for use on any reports or letters generated and maintained by EMU.

4.2.12 Non-Person Names

All information is typed in upper/lower case format (i.e. not all caps or all lower). If an "article" (a, an, or the) is used as an adjective within the full legal name of a non-person entry, it should be included when

entering the name in Banner. If a non-person name begins with the word 'The', it should be included when entering the name in Banner (e.g. The Colorado College).

Example:

ABC Trucking
 Department of Defense
 University of Portland
 J F Kennedy Company
 First National Bank
 The Earle

4.2.13 Name Type and Description

The Current Name field in Banner does not require a name type to be associated with a name. If a name type is associated with a current name, the name type field should be cleared at the same time a name change is entered in Banner. The name type associated with the former name will appear in the Alternate ID block with the former name.

The following table describes name types defined for EMU's Banner System.

| Code | Description | Explanation |
|------|--------------------------|---|
| ADFA | Adjunct Faculty | Used to identify adjunct faculty who are not a student, vendor or employee of the university but are providing services to the university. Entered by Academic Human Resources. Please do not delete this name type if ever making an authorized name change. |
| AKA | Also Known As | To capture names of individuals who use an alternate version of their legal name (e.g.: Bill Smith instead of Norman William Smith). |
| ASID | Associated ID | For use by Advancement Services only. |
| AAUP | Active AAUP Office Staff | |
| DUP | Duplicate Record | Used to indicate a duplicate person record that has been flagged to be deleted from the system. Duplicate records also have an ID that start with 'X' (see Person ID format 6 in Section 2.2.1). |
| ECA | Early College Alliance | The Early College Alliance is a new public early/middle college program at EMU in partnership with local school districts and Washtenaw ISD. |
| EMER | Emeritus Faculty/Staff | Used to identify EMU faculty and staff who have been given Emeritus status after retirement by the Board of Regents. Entered by Human Resources and Academic Human Resources. Please do not delete this name type if ever making an authorized name change. |
| EVGT | Event Guest | For use by Advancement Services only. |
| FNDN | EMU Foundation Employee | |
| FORM | Former Name | |
| MAID | Maiden | |

| Code | Description | Explanation |
|------|------------------------------------|---|
| MILI | Military | Used to identify 'persons' in Banner who are not a student, vendor or employee of the university but an entity of the Department of Military Science & Leadership. Entered by Academic Human Resources. Please do not delete this name type if ever making an authorized name change. |
| SORT | Sorting Name | Recommended by SCT for reporting purposes. An organization such as The Adea Group (SMARTID ADEGRO) could have a sort name assigned so that it would appear in the As rather than the Ts. |
| TADJ | Terminated Adjunct Faculty | |
| TAUP | Terminated AAUP Office Staff | |
| TECA | Terminated ECA Faculty | |
| TFND | Terminated EMU Foundation Employee | |
| TMIL | Terminated Military (Academic HR) | |
| UNVE | Unverified Name Change | Used by Advancement Services only to record name changes that are not officially documented. |

NOTE: The UIC Code (Michigan UIC) was temporarily stored as an Alternate Name in Banner 7 until the 'Additional ID' table became available in Banner 8.

4.3 Guidelines

4.3.1 Adding New Name Records

Include procedures for NAME & ID search before creating a new person or non-person.

NON-PERSON Name Searches: Use the wild card (%) in front of and behind the name.

Example: Full legal name: The Earle
 SMART ID: EARLE
 Search as: %Earle%

4.3.2 Name Change Policies

Faculty will direct name change requests to Academic Human Resources. Staff will direct name change requests to Staff Human Resources. Students will direct name change requests to Office of Records and Registration or Service EMU. Faculty/staff who are also students may direct their requests to the Office of Records and Registration or Service EMU, although the preferred office would be the appropriate Human Resources area. Donors will direct their name changes to EMU Foundation Gifts and Records Office.

A common name change form should be used and appropriate documentation provided (see Figure 1.0). Due to employee name change documentation requirements, the General Person form (GUASYST) should be checked before any name change is done. If the person is part of the Human Resources module as an employee, a social security card is required as name change documentation.

4.3.3 Change Form

See Figure 1.0.

EASTERN MICHIGAN UNIVERSITY

Name Change Form (Please Print)

Banner ID: _____ SSN: _____

Current Name: _____

New Name: _____

Date of Birth: _____

Daytime Telephone: _____ Email address: _____

Please include any other names under which you may have been associated with Eastern Michigan University:

Check all that apply:

Student Faculty/Lecturers/Adjunct Lecturer Staff/Student Employee Alumni

Return this form, with proper documentation, to the appropriate office below.

Faculty/Lecturers/Adjunct Lecturers: Academic Human Resources, 202 Bcone Hall

Staff: Staff Human Resources, 140 McKenny Hall

Students/Student Employees: Office of Records and Registration, 303 Pierce or Service EMU, Room 268 Student Center

Required Documents:

- ✓ **Employees/Student Employees: Social Security Card with new name required.**
- ✓ Students/Alumni: Driver's License, Social Security Card, Marriage License, Divorce Decree or other Court Document showing name change.

Students please note: Future employment verification may require a copy of a social security card to ensure the name and social security number on record match the name and number on the social security card.

Statement of Responsibility:

I assume responsibility for the consequences or problems that may occur as a result of this change of my name. There is no intent on my part to defraud Eastern Michigan University.

Signature: _____ Date: _____

FOR OFFICE USE ONLY

WHEN ACCEPTING NAME CHANGE FORMS

1. Check person's role on GUASYST.
2. Request proper documentation based on person's role at EMU. See Required Documents section above.
3. If person is an employee/student employee – request SSN card with new name. Update name on Banner and verify that SSN is correct on Banner. If not, update the SSN on Banner.
Do not keep copy of SSN card.

Name change processed _____ Banner SSN verified/changed (if employee) _____
Initial Initial

Rev 04/09/2008

4.4 Standard Change Record

| | |
|------------|---|
| 08/13/2003 | 4.2.13 Name Type and Description Approved use of SORT, MAID and AKA |
| 10/13/2004 | 4.2.13 Name Type and Description Added types "ADFA", "EMER", "MILI" |
| 01/31/2006 | 4.2 Standards Added exception for GIFT_SOCIETY_NAME field in the Advancement module 4.3.3 Change Form Updated Name Change Form (Figure 1.0) |
| 02/22/2006 | 4.1 General Deleted reference to form RPAIDEN 4.3.2 Name Change Policies Added "Service EMU" to list of offices appropriate for name change requests |
| 04/09/2008 | 4.3.3 Change Form Updated form 4.2.13 Name Type and Description Added Code ECA |
| 01/12/2011 | 4.2.13 Name Type and Description Added AAUP Code Added FNDN Code Added FORM Code Added TADJ Code Added TAUP Code Added TECA Code Added TFND Code Added TMIL Code Added Note below table regarding UIC Code |

5 Addresses

5.1 General

University-wide conventions are critical for shared data such as addresses; we should be mindful of the purposes for which the data are entered. For example, units with marketing responsibility (such as Institutional Advancement and Admissions) must be able to produce individualized correspondence conforming to formal addressing rules. Units such as Student Financial Services and Accounts Payable may have less stringent formatting requirements, but should still follow the standards set forth here. These standards must balance four considerations:

- Banner System Requirements
- Accepted standards for formal communications
- U.S. Postal Service guidelines
- International address requirements

All addresses must meet US Postal Service addressing requirements. According to the US Postal Service Postal Addressing Standards, "A standardized address is one that is fully spelled out, abbreviated by using the Postal Service standard abbreviations ... and uses the proper format for the address style..." (p. 1). The guidelines expressed herein are designed to convey the minimum standard requirements in order to enhance the processing and delivery of mail, reduce instances of 'undeliverable' mail, and position the University to obtain the most advantageous postal rates.

While data may be conditioned (or reformatted) on output (e.g. date format), it is our intention that addresses be entered exactly as they will print on correspondence, reports, etc. Accurate, consistent address data entry is vital. Given these considerations, the following address data entry standards are recommended.

5.2 Standards

All information is typed in upper/lower case format (i.e., not all caps or all lower).

NOTE:

The Office of Admissions has assumed the responsibility of maintaining a yearly contract with the U.S. Postal Service to provide EMU with monthly updates to the zip code tables and related City, State, County relationships. The monthly updates disks will be forwarded to ICT to update the appropriate Banner tables and records affected by any changes.

5.2.1 Symbols

Symbols should never be used in the first position of an address field.

The ampersand '&' should never be used in place of 'and'.

The percent symbol '%' should never be used.

The designation for 'in care of' should be abbreviated as 'c/o' and should be entered on the first street address line.

Never use a pound sign '#' within an address because it causes a problem with the Banner printing function.

5.2.2 *Street Names*

Street names are composed of a number, the street name and a possible unit designator. Follow the guidelines below in entering an address into Banner.

5.2.3 *Punctuation*

Punctuation in the street number and name is normally limited to periods, slashes and hyphens and should be used if space permits. With the exception of the hyphen in the zip plus 4 configuration, punctuation in the address may be omitted if necessary.

| | |
|---------------------------------|-----------------------|
| Periods: | 39.2 RD |
| Slashes (fractional addresses): | 101 ½ Main St |
| Hyphens (hyphenated address): | 289-01 Montgomery Ave |

Do not use periods after abbreviations.

5.2.4 *Secondary Address Unit Designators*

If the street address contains a secondary unit designator, such as an apartment, suite, building, etc., the preferred location is at the end of the street address.

Examples:

102 Main St Apt 101
1356 Executive Dr Ste 202
1600 Central Pl Bldg 14
55 Sylvan Blvd Rm 18

If the primary address uses all available characters on the address line, the secondary unit designator should be on the first address line preceding the primary address. The unit designator should never be on the line following the primary address.

Examples:

Ste 202
1356 S Executive Dr

Recommended abbreviations for common unit designators are:

| | |
|------------|------|
| Apartment | Apt |
| Building | Bldg |
| Department | Dept |
| Floor | Fl |
| Room | Rm |
| Suite | Ste |
| Trailer | Trlr |
| Unit | Unit |

Refer to the Postal Addressing Standards publication for other unit designator abbreviations (see Section 5.2.8 – Sources for Additional Information).

5.2.5 *Compass Directions*

If appropriate, compass directional words may be abbreviated at the beginning and/or end of the street name. Since a directional word could be confused with the street name, apparent directional words in the middle of the address line should be spelled out; the second directional word must always be spelled out if space will not allow both to be spelled out.

Examples:

102 N Main St SW
160 North South St
1624 N South Blvd

Compass directional words should be abbreviated as follows:

| | | | |
|-------|---|-----------|----|
| East | E | Northeast | NE |
| West | W | Northwest | NW |
| North | N | Southeast | SE |
| South | S | Southwest | SW |

Do not use abbreviated compass directions in city names if you have enough space to enter the entire city name spelled out.

5.2.6 *Street Address and P.O. Box*

Banner address formats allow three lines of street address information. If an address contains BOTH a street address and a post office box, the U.S. Post Office will deliver mail to the first address line listed above the city/state/zip line. In this situation, it is preferred that the post office box be the last part of the address entered before the city/state/zip.

| | INFORMATION GIVEN | BANNER ADDRESS ENTRY |
|-------------------------|-------------------------|-------------------------|
| Dr. John Franklin Smith | Dr. John Franklin Smith | Dr John Franklin Smith |
| Evergreen Building | Evergreen Building | Evergreen Bldg |
| 1379 West Pine | P.O. Box 2351 | 1379 W Pine |
| P.O. Box 2351 | 1379 W Pine | PO Box 2351 |
| Denver, Colorado 87003 | Denver, Colorado 87003 | Denver, CO 87003 |

Do not enter data into the second address line until data has been entered into the first address line. Also, data should not be entered in the third address line until data has been entered into the second line. An example of a three-line address is:

c/o Marvin Martian
Chanin and Levers Inc
1600 Martian Blvd Ste 910

5.2.7 Abbreviations for Street Designators

Street designators should follow the standard U.S. Post Office standards. Refer to the U.S. Postal Service Address Standards publication for abbreviations of designators not listed below.

| STREET SUFFIX | ABBREVIATION |
|----------------------|---------------------|
| Avenue | Ave |
| Boulevard | Blvd |
| Branch | Br |
| Center | Ctr |
| Court | Ct |
| Circle | Cir |
| Drive | Dr |
| Estate | Est |
| Highway | Hwy |
| Lane | Ln |
| Parkway | Pkwy |
| Place | Pl |
| Road | Rd |
| Square | Sq |
| Station | Sta |
| Street | St |
| Terrace | Ter |
| Trail | Trl |
| Way | Way |

5.2.8 Sources for Additional Information

There are style manuals that deal with formal addressing style. Several U.S. Postal Service publications deal with addressing standards. The most comprehensive and accessible publication is Postal Addressing Standards, Publication 28. This publication is available from the U.S. Postal Service as well as in a portable document format (PDF) on the World Wide Web at:

<http://pe.usps.gov/cpim/ftp/pubs/pub28/pub28.pdf>

The US Postal Service National Customer Support Center has a very useful web site that provides extensive address and zip code information:

<http://www.usps.gov/ncsc/>

The Canadian Postal service (Canada Post) also offers a very useful web site:

<http://www.canadapost.ca/tools/pcl/bin/advanced-e.asp>

5.2.9 City

Banner is configured to automatically enter the city name when a zip code is entered. This is the preferred method of entering the city name. If the preferred name which defaults is not correct, it is acceptable to change the city to the actual city name (For example, when entering the zip code 48198, the city will default as Ypsilanti, but it could also be the city of Rawsonville. If requested, manually change the city to Rawsonville following the standards below.) All information is typed in upper/lower case format, i.e. not all caps or all lower. Spell out city names in their entirety. If it is necessary to

abbreviate city names to fit within the 20 characters allowed by Banner, use abbreviation standards described herein or in the US Postal Service Postal Addressing Standards.

Examples:

| | |
|------------------|---------------|
| Preferred | Acceptable |
| West Stockbridge | W Stockbridge |
| Newberry Springs | Newberry Spgs |

5.2.10 State and Province

Banner is configured to automatically enter the state name when a zip code is entered. This is the preferred method of entering the state name.

State codes must be entered for all U.S. and Canadian addresses. The appropriate code may be selected using Banner software. For additional information, refer to the Postal Service Address Standards publication. (System generated from zip code entry).

Canadian Provinces are entered in the State/Province field, NOT in the City field. Canadian provinces and territories are:

| Province or Territory | Code |
|------------------------------|-------------|
| Alberta | AB |
| British Columbia | BC |
| Manitoba | MB |
| New Brunswick | NB |
| Newfoundland and Labrador | NL |
| Northwest Territories | NT |
| Nova Scotia | NS |
| Nunavut | NU |
| Ontario | ON |
| Prince Edward Island | PE |
| Québec | QC |
| Saskatchewan | SK |
| Yukon | YT |

5.2.11 County

Banner is configured to automatically enter the county name when a zip code is entered. This is the preferred method of entering the county name. The county code is a 5 character code consisting of the 2-character state code plus the 3-digit FIPS (Federal Information Processing Standards) county code (PUB 6-4, May 2002). If no county defaults when entering the zip, enter the county code from the list of values in the validation form.

5.2.12 Zip or Postal Code

Zip or postal codes MUST be entered for all U.S. and Canadian addresses. If available, it should also be entered for other international addresses.

5.2.12.1 United States

A hyphen must be entered when the entire 9 digit (zip plus four) zip code is available. If the last four digits are unavailable, enter the first five digits in the first five positions of the field without the hyphen.

Examples:

97203
97203-5798

U.S. Zip codes can be looked up at:

<http://zip4.usps.com/zip4/welcome.jsp>

5.2.12.2 Canada

Enter the six-character postal code by keying in 3 characters, a space and the last 3 characters.

Examples:

T2T 2Y5
R2L 1N4

Canadian postal codes can be looked up at:

<http://www.canadapost.ca/tools/pcl/bin/advanced-e.asp?sblid=pcl>

5.2.13 Nation

A nation code is required for all non-U.S. addresses. Banner maintains a list of all the current code options available (FIPS PUB 10-4).

DO NOT enter a country code for U.S. addresses. In Banner, the default country designation is "U.S."

NOTE: Postal standards request nation codes be in all caps. The downloaded values from FIPS came as mixed case. Data standards committee decided it was not necessary to change these to all caps.

5.2.14 Military Address

5.2.14.1 Overseas Locations

Overseas military addresses must contain the APO (Army Post Office) or FPO (Fleet Post Office) designation along with a two-character "state" abbreviation of AE, AP or AA and the zip code.

Enter the zip code in the zip code field

The APO or FPO code will default into the City field

The military 'State' code (AA, AE or AP) will also default into the State field.

AA for mail in the Americas other than Canada (340)
AE for mail going to Europe, the Middle East, Africa and
Canada (090 through 098)
AP for mail destined to the Pacific (962 through 966)

Examples:

SSGT Mario Martian
Unit 2050 Box 4190
APO AP 96522-1215

Sgt Cher Downey
PSC 802 Box 2625
APO AE 09777-0010

Seaman Duane Reeves
B Division
USS North Dakota
FPO AA 34093-2344

5.2.14.2 Domestic Locations

All domestic military mail must have a regular street style address.

Examples:

Col Margaret Henry
Lowery Air Force Base
8205 East Sixth Avenue 405
Denver CO 80234

Capt Jack Harris
2314 Barracks St
Minot AFB ND 58705

5.2.15 International Addresses

Enter an international address exactly as provided, including punctuation. Try to avoid commas, however, as much as possible.

Do not abbreviate words that are spelled out.

With the exception of Canadian addresses, address line 3 should contain the full name of the province or state for a foreign address. Canadian addresses should use the state/province code field for the province code.

Use the Nation Validation values to enter nation or country codes. This way the university can better control the printing of international addresses on letters and forms.

If available, the postal code should be entered in the ZIP/postal code field.

5.2.16 Hierarchy of Modifications

When it is necessary to modify addresses to fit Banner fields or conventions, follow these steps in order:

When secondary delivery information, e.g., Apt or Suite, is part of the address but does not fit on the Delivery Address Line, wrap up all components of the secondary information immediately above the Delivery Address Line.

Example:

Ms Michelle Simpkins
Bldg 14-400
14200 Old South Mississippi Parkway
Aurora, CO 80111-1111

Abbreviate addresses using standard postal abbreviations described herein.

Example:

Ms Michelle Simpkins
58000 E Happy Canyon Blvd
Englewood, CO 80110

Remove Punctuation

Example:

Ms Michelle Simpkins
5800 E Martin Luther King Blvd
Denver, CO 80010

5.2.17 Address Types

It is our desire to maintain a standardized list of address types based on their purposes, rather than separate address types for each university department. This will reduce redundant data entry. Thus, an individual may appear in accounts payable, be an alumni, employee and enrolled as a current student in the College of Business and have only a single address. The EMU Foundation can put a "preferred indicator" on any address type in the alumni module. This indicator cannot be viewed in any module except Alumni.

Each Banner application (e.g. recruitment mail, billing grades and gift solicitations) will look for a valid address in a prescribed sequence. For example, the grade mailing routine might look for addresses in this order: SM, MA and then LO. Admissions might typically search for a mailing address in this order: SM and then MA. Identical addresses should not be keyed in different address types.

The following table describes address types defined for Eastern Michigan University's Banner System.

| <u>Code</u> | <u>Description</u> | <u>Explanation</u> |
|-------------|--------------------|--|
| AB | Alumni Billing | Alumni Billing Address Advancement Area address for non-person records maintained for fundraising purposes such as gift acknowledgement, event invitations, etc. Updates to be done by Advancement Area only. |
| BI | Billing | Billing Address Address used for person billing purposes. It must contain an address that is different than the MA or LO address for said person. These addresses are created, maintained and deleted by Student Business Services in the Student Module. (Required by Banner for sample data purposes if the Finance System is in place) |

Note: It has not yet been defined how these addresses will be used by the Finance Module.

| <u>Code</u> | <u>Description</u> | <u>Explanation</u> |
|-------------|--------------------|---|
| BU | Business | <p>Business Address</p> <p>The principal address for finance transactions. Note: addresses for the purpose of submitting purchase orders are maintained separately within the Finance module. (Required by Banner for sample data purposes if the Finance System is in place) This address type will be used even if it is a duplication of another address type.</p> <p>Approved format for on-campus BU addresses includes "CAMPUS" as the city and "XXXXX" as the zip.</p> |
| CA | Campus | <p>Campus Address for EMU Employees</p> <p>An EMU employee's physical location (office/department) on campus. This address will be used to create the campus directory and for any on-campus mailings to employees. Accounts payable will use this address to refund money to an employee. This address type is not used for payroll purposes.</p> <p>Approved format for CA addresses is as follows:</p> <p>Department Name or Office Name Address of Department or Office Ypsilanti, MI 48197</p> |
| DM | Diploma | <p>Diploma Mailing Address</p> <p>Address to which a diploma will be mailed for a graduating student. Diplomas are delivered by UPS; hence the address may not contain a P.O. Box. This address type is created, maintained and deleted by the Office of Records and Registration only.</p> |
| EB | Entity Billing | <p>Entity Billing Address</p> <p>This address type is used for invoicing of Third Party Billing entities (within Student Business Services).</p> |
| EM | My.Emich | <p>My.Emich Email</p> <p>Duplicates email address on GOAEMAL. To be used for generating email correspondence. Updated daily by ICT and should not be changed by any other office. Note that the City, State, Zip Code are defaulted to EMU, MI, 48197 in order to meet Banner requirements that these address fields be populated.</p> |
| GR | Grant | <p>Grant Billing Address</p> <p>Used by the Grants Accounting Office in the Finance Division.</p> |
| I2 | I20 | <p>I-20 Address</p> <p>This address contains the name and address of a third-party person to whom the Office of Admissions releases an I-20 for an international student. The Admissions Office must have written authorization from the student to release the I-20 in this manner. The address is start-dated the date the authorization is received and end-dated the date of the I-20 release. These addresses are created, maintained and deleted by the Office of Admissions.</p> |

| <u>Code</u> | <u>Description</u> | <u>Explanation</u> |
|-------------|--------------------|---|
| IS | Intl Student | <p>International Student Address</p> <p>This address type is used for an international student's address in his or her home country. This has to be an address outside the USA. This address is entered by the Office of Admissions and maintained by the Office of International Students ONLY.</p> |
| LO | Local | <p>Local Mailing Address (Off-campus)</p> <p>This address type is used for students and represents an off-campus, local address that is different than their MA-permanent mailing address. For international students, this address type is used for their U.S. address – their international address MUST be put in address type "IS." Students living on-campus will have their address listed under address Type 'RH = Residence Hall'. Students living with parents and commuting to EMU will only have an MA address type and will not have an LO address. This address type is used in payroll and W2 processing for all employee types and should not be inactivated until February 1st of the year following termination of employment.</p> |
| MA | Permanent | <p>Permanent Mailing Address</p> <p>This address type is used in payroll and W2 processing for all employee types and should not be inactivated until February 1st of the year following termination of employment. This is the permanent mailing address for faculty, staff, students, alumni and donors. It is the default address type for Admissions and Financial Aid tape loads although it may not reflect a true permanent mailing address until the student applies for admission.</p> <p>(This address type is the default address type for the Banner System and is required by Banner for Student tape load processing and Alumni/Development Student Loading Processes.)</p> |
| PA | Parent | <p>Parent Address of a Student.</p> <p>This address type is created, maintained and deleted by Student Business Services for parent loans (required by Banner for tape load processing).</p> <p>NOTE: It has not been yet been defined how Banner uses this address type for the tape load process.</p> |
| RF | Refund | <p>Refund Mailing Address</p> <p>This address type is used by Student Business Services to issue refund checks for student pick-up or to an address other than those already on the system.</p> |
| RH | Residence | <p>Residence Hall Address</p> <p>This is a student on-campus housing address created, maintained and deleted by the Housing Office.</p> |
| SE | Seasonal | <p>Seasonal Mailing Address</p> <p>Maintained by the Advancement Area for the purpose of tracking multiple residences that are not occupied on a year round basis. Primary seasonal address should be coded MA and secondary address(es) should be SE type.</p> |

| <u>Code</u> | <u>Description</u> | <u>Explanation</u> |
|-------------|--------------------|---|
| SM | Special | Special Mailing Address This address type is intended primarily to store the U.S. address for International students while they are enrolled at EMU. It can also be used to maintain a temporary address for domestic students. THIS ADDRESS TYPE IS NO LONGER USED. |
| WK | Work | Work Address for non-EMU employees This address type is intended to record the work address of persons. DO NOT use this address type for EMU employee addresses. Approved format for WK addresses is as follows: Business Name Street Address City, ST ZIP |
| WS | Work Supplemental | Supplemental Work Address for non-EMU employees This address type is intended to record a supplemental work address of persons. DO NOT use this address type for EMU employee addresses. Approved format for WS addresses is as follows: Business Name Street Address City, ST ZIP |
| XX | TGR FEED | Used internally by Banner (Student AR feed to Finance). |

5.2.18 Office(s) Responsible for Creation and Changes of Each Address

Type

| ADDRESS TYPE | DESCRIPTION | OWNER |
|---------------------|---|--|
| AB | Alumni Billing Address | Alumni/Development |
| BI | Billing Address | Finance |
| BU | Business Address | Finance |
| CA | Campus Address for EMU Employees | Human Resources (all) |
| DM | Diploma Mailing Address | Records & Registration |
| EB | Entity Billing Address | Student Business Services |
| EM | "my.emich" Email Address | ICT |
| GR | Grant Billing Address | Finance |
| I2 | I-20 Address | Admissions |
| IS | International Student Permanent Mailing Address | -Recruits/applicants – Admissions -Student – Office of International Students |
| LO | Local Mailing Address (Off-campus) | -International Recruits/applicants – Admissions -International Students – Office of International Students -U.S. Students – Records & Registration |

| ADDRESS TYPE | DESCRIPTION | OWNER |
|--------------|---|--|
| MA | Permanent Mailing Address | -Faculty/Staff – appropriate Human Resources -Recruits/applicants – Admissions -Students – Records & Registration, Office of International Students -Donors – Advancement |
| PA | Parent Address of a Student | Student Business Services |
| RF | Refund Address | Student Business Services |
| RH | Residence Hall Address | Housing |
| SE | Seasonal Mailing Address | Alumni/Development |
| SM | Special Mailing Address | THIS ADDRESS TYPE IS NO LONGER USED. |
| WK | Work Address for non-EMU Employees | Admissions, Records & Registration, Advancement |
| WS | Work Supplemental Address for non-EMU Employees | Admissions, Records & Registration, Advancement |
| XX | Used internally by Banner | TBD |

5.3 Procedure for Updating Addresses

If an existing address must be cleaned up to meet data entry standards (i.e. fix it to meet U.S. postal standards), then the existing address can be modified.

If an existing address within an address type changes, do the following:

- End date the existing address using the date that is one day before the new address becomes effective (e.g.: if today is 9/20/04 and the new address is effective today, then end date the old address with 9/19/04)
- Check the 'inactive' box on the existing address IF the end date is not in the future. Note that this action will automatically check the 'inactive' box on SPATELE for the phone number associated with this address. ICT will run a script to check this box when a future date is reached.
- Add the new address, following established data standards, using a start date that is one day after the end date entered on the previous address
- Add the phone number on the new address record, even if it did not change

NOTE: Removing an end date from an address and unclicking the 'inactive' box deletes the phone number associated with that address from SPATELE – you must re-establish the phone number on SPATELE.

5.3.1 Using Address Source Codes

Whenever possible, address source codes should be used when adding or updating addresses. Double click in the Source field on the Address information block of SPAIDEN to bring up the list of Address Source Codes.

Returned Mail:

Address source codes should always be used when updating an address as a result of receiving returned mail. For returned mail, follow the steps below:

- End date the existing address using the previous day's date.
- Check the 'inactive' box on the existing address.
- Add the Address Source Code of 'UNDL' – Undeliverable Mail.

- If a forwarding address is provided by the Post Office, add the new address following established data standards. Use a start date that is one day after the end date entered on the previous address.
- Add an Address Source Code of 'POST' - Post Office.
- Add the phone number on the new address record.

Do Not Contact Requests from Students:

The 'DNC' - Do Not Contact source code is used when a student prospect or former student does not wish to be contacted by EMU. The person's role at the University and their status as a student must be evaluated before ending the address and using this source code.

- Check GUASYST to determine if the person has any other roles (e.g. employee, Student AR, etc.) within the University. If yes, it may not be possible to end-the existing address; appropriate areas should be consulted.
- End date the existing address using the previous day's date.
- Check the 'inactive' box on the existing address.
- Add the Address Source Code of 'DNC'.

5.3.2 Address Sources

Sources of the address are shown on the STVASRC table.

| CODE | DESCRIPTION |
|------|-------------------------------|
| ACT | ACT Tape |
| APP | Admissions Application |
| ASAC | Adv Serv-Accurint |
| ASAL | Adv Serv-Alumni |
| ASAT | Adv Serv-Athletics |
| ASBC | Adv Serv-BCI |
| ASBD | Adv Serv-Band |
| ASDP | Adv Serv-Department |
| ASEO | Adv Serv-Executive Office |
| ASHS | Adv Serv-Harris Publications |
| ASMA | Adv Serv-Mail-Gift |
| ASNC | Adv Serv-NCATE |
| ASPB | Adv Serv-Phone Book |
| ASPH | Adv Serv-Phone Center |
| ASPO | Adv Serv-Possible |
| ASSP | Adv Serv-Spouse Record |
| ASVS | Adv Serv-Via Secondary Source |
| ASWM | Adv Serv-WEMU |
| AXOM | Admissions-AXIOM |
| CERG | CE Registration Form |
| CONV | Conversion |
| DNC | Do Not Contact per Student |
| DSRV | Web - Data Standards Review |
| FA | Financial Aid |
| GMAT | GMAT Tape |

| CODE | DESCRIPTION |
|------|----------------------------------|
| GRE | GRE Tape |
| HR | Human Resources |
| ISIR | Financial Aid - ISIR Tape |
| MTTC | MTTC Tape |
| NCRU | NCCRU Tape |
| OIS | Office of International Students |
| POST | Post Office |
| PRW2 | Payroll W2 Processing |
| PSAT | PSAT Tape |
| RRSR | Records Office-Student Reported |
| SAT | Sat Tape |
| SELF | Self-Reported |
| TRAN | Transcript |
| UNDL | Undeliverable Mail per USPO |
| WEB | World Wide Web |
| XACP | Purchased Name - ACT Plan |
| XACT | Purchased Name - ACT |
| XNCR | Purchased Name - NCCRU |
| XPSE | Purchased Name - PSAT |
| XSAT | Purchased Name - SAT |

5.4 **Standard Change Record**

- 07/31/2002 5.2.15 International Addresses
Clarified that Canadian province codes should not be entered on the address line 3, but entered in the state/province code field
- 08/05/2002 5.2.12 Zip or Postal Code
Clarified that postal codes, for international addresses, if available, should be entered
- 5.2.15 International Addresses
Clarified that postal codes, for international addresses, if available, should be entered in the ZIP/postal code field
- 10/28/2002 5.2.1 Symbols
Clarified that "&" should never be used
- 08/01/2003 5.2.17 Address Types
Added Alumni Billing, Entity Billing, Seasonal
Clarified use of business type
Added approved format for campus addresses in business and campus address types
- 5.2.18 Office(s) Responsible for Creation and Changes of Each Address Type
Added responsible office for new address types
- 5.2.19 Address Sources
Added financial aid and undergraduate transfer center

| | |
|------------|--|
| | 5.3 Guidelines Added that inactive box should be checked when end dating an address |
| 10/13/2003 | 5.2.17 Address Types Added Work Supplemental Added approved format for work and work supplemental addresses |
| 10/27/2004 | 5.3 Procedure for Updating Addresses Updated procedure |
| 01/31/2006 | 5.2.17 Address Types Added Address Type "IS" International Student Address Marked Address Type "SM" as no longer used 5.2.18 Office(s) Responsible for Creation and Changes of Each Address Type Added Address Type "IS" Marked Address Type "SM" as no longer used 5.2.19* Updated table with current values |
| 02/22/2006 | 5.3.1 Using Address Source Codes Added section |
| 12/13/2006 | 5.2.17 Address Types Minor changes to Address Types |
| 04/09/2008 | 5.3.2 Address Sources Added "DNC" and "HR" to Address Source Codes |

*3/8/11: Reviewed; leaving entry "as is" since this section does not exist as of this date and it is assumed the section was removed or rolled into another section.

6 Telephone Numbers

6.1 General

An entity (person or non-person) may have multiple telephone numbers within the Banner system. Telephone numbers should be accurate and reflect the most recent data received. Supplemental information for international phone numbers may be added in the international access code field. Forms which house telephone numbers are: APATELE, FOATELE, PPATELE, RPATELE and SPATELE.

6.2 Standards

All regional and local telephone numbers, including on-campus phone numbers, are entered using the ten-digit format.

6.2.1 Telephone Types

A telephone type distinguishes each telephone number entered in the Banner system. There are two categories of telephone types:

6.2.1.1 General Telephone Types

This is a telephone number associated with a person or a non-person that is not related to a specific address.

GENERAL TELEPHONE TYPES

| CODE | DESCRIPTION | EXPLANATION |
|------|-------------------|---|
| CE | Cell Phone Number | Cell phone number associated with a person or non-person |
| FAX | Fax Number | Fax number associated with a vendor in the Finance module |
| PGR | Pager Number | Pager number associated with a person or non-person |

6.2.1.2 Address Telephone Types

This is a telephone number associated with a specific address of the same type. Each address type defined in General Person will have a like Address Telephone Type defined.

ADDRESS TELEPHONE TYPES (match the address types)

| CODE | DESCRIPTION | EXPLANATION |
|------|---------------------------------|---|
| AB | Alumni Billing Telephone Type | Telephone number associated with an alumni billing address |
| BI | Billing Address Telephone Type | Telephone number associated with a billing address |
| BU | Business Address Telephone Type | Telephone number associated with a business address |
| CA | Campus Address Telephone Type | Telephone number associated with an EMU employee campus address |

| CODE | DESCRIPTION | EXPLANATION |
|-------------|--|--|
| DM | Diploma Mailing Address Telephone Type | Telephone number associated with a diploma mailing address |
| EB | Entity Billing Address Telephone Type | Telephone number associated with an entity billing address |
| GR | Grants Accounting Address Telephone Type | Telephone number associated with a grant billing address |
| I2 | I-20 Mailing Address Telephone Type | Telephone number associated with a I-20 mailing address |
| LO | Local Address Telephone Type | Telephone number associated with a local non-housing address |
| IS | International Address Telephone Type | Telephone number associated with an international address |
| MA | Mailing Address Telephone Type | Telephone number associated with a permanent mailing address |
| PA | Parent Address Telephone Type | Telephone number associated with a parent address |
| RF | Refund Address Telephone Type | Telephone number associated with a refund mailing address |
| RH | Residence Hall Address Telephone Type | Telephone number associated with a residence hall address |
| SE | Seasonal Mailing Address Telephone Type | Telephone number associated with a seasonal mailing address |
| SM | Special Mailing Address Telephone Type | THIS ADDRESS TYPE IS NO LONGER USED. |
| WK | Work Address Telephone Type | Telephone number associated with a non-EMU work address |
| WS | Work Supplemental Address Telephone Type | Telephone number associated with a non-EMU work supplemental address |
| XX | Used internally by Banner | |

6.2.2 Office(s) Responsible for Creation and Changes of Each Address Telephone Type

| ADDRESS TELEPHONE TYPE | DESCRIPTION | OWNER |
|-------------------------------|--|--|
| AB | Alumni Billing Address Telephone Type | Alumni/Development |
| BI | Billing Address Telephone Type | Finance |
| BU | Business Address Telephone Type | Finance |
| CA | Campus Address Telephone Type | Human Resources (all) |
| DM | Diploma Mailing Address Telephone Type | Records & Registration |
| EB | Entity Billing Address Telephone Type | Student Business Services |
| GR | Grants Accounting Address Telephone Type | Finance |
| I2 | I-20 Mailing Address Telephone Type | Admissions, Office of International Students |
| IS | International Student Address | Admissions, Office of International Students |

| ADDRESS TELEPHONE TYPE | DESCRIPTION | OWNER |
|------------------------|--|---|
| LO | Local Address Telephone Type | -Records & Registration, domestic students -Admissions, international recruits & applicants -Office of International Students, International students |
| MA | Mailing Address Telephone Type | -Faculty/Staff – appropriate Human Resources - Recruits/applicants – Admissions -Students – Records & Registration -Donors – Alumni/ Development |
| PA | Parent Address Telephone Type | Student Business Services |
| RF | Refund Address Telephone Type | Student Business Services |
| RH | Residence Hall Address Telephone Type | Housing |
| SE | Seasonal Mailing Address Telephone Type | Alumni/Development |
| SM | Special Mailing Address Telephone Type | THIS ADDRESS TYPE IS NO LONGER USED. |
| WK | Work Address Telephone Type | Admissions, Records & Registration, Advancement |
| WS | Work Supplemental Address Telephone Type | Admissions, Records & Registration, Advancement |
| XX | Used internally by Banner | TBD |

6.2.3 Telephone Numbers

The telephone number is presented in a three-field format.

6.2.3.1 Area Code

The three-digit area code must be entered for all phone numbers including the local (734) area.

Note: Some converted phone numbers will not have an associated area code.

6.2.3.2 Phone Number

Enter the seven-digit number without inserting a hyphen.

Example: 4871849

6.2.3.3 Extension

If an extension number is provided, enter only the digits of the extension. Do NOT enter EXT or X into the extension field.

Example: 7300, 1764

6.2.4 International Telephone Numbers

International telephone numbers consist of four to seven digits.

6.2.4.1 International access code field

International telephone numbers should include the country and city codes as part of the international access code field.

6.2.4.1.1 Country Code

The country code consists of one to four digits and is required (e.g. 876)

6.2.4.1.2 City Code

The city code consists of one to three digits. Not all countries utilize city codes. The city code is often reported with a leading zero (0). Do NOT enter the zero.

“011” must be dialed when making international calls from the United States unless dialing to any country included in the North American Numbering Plan.

6.2.4.2 North American Numbering Plan (NANP)

This agreement, held among many North American countries (Mexico is not included) establishes a procedure for dialing international numbers in a way that is similar to traditional United States procedures (1 + area code). The country code for all NANP countries is 1. The following countries are considered to be a part of the NANP and can be dialed using 1 + the three digit area code. Any phone numbers from NANP countries can be entered in the domestic phone number field in the Banner system.

| Country | Area Code |
|------------------------|-----------|
| Anguilla | 264 |
| Antigua | 268 |
| Bahamas | 242 |
| Barbados | 246 |
| Barbuda | 268 |
| Bermuda | 441 |
| British Virgin Islands | 284 |
| Canada | Multiple |
| Cayman Islands | 345 |
| Dominica | 767 |
| Dominican Republic | 809 |
| Grenada | 473 |
| Guam | 671 |
| Jamaica | 876 |
| Montserrat | 664 |

| Country | Area Code |
|---|------------------|
| Northern Marianas Islands (Saipan, Rota and Tinian) | 671 |
| Puerto Rico | 787 |
| St. Kitts/Nevis | 869 |
| St. Lucia | 758 |
| St. Vincent and Grenadines | 784 |
| Trinidad and Tobago | 868 |
| Turks and Caicos Islands | 649 |
| U.S. Virgin Islands | 340 |

6.3 Guidelines

When adding a subsequent telephone number of the same type, the prior telephone number should be end dated, marked inactive, and the new telephone number added. Unless making a correction due to an initial entry error, do not change or delete the prior telephone number.

NOTE: Telephone numbers, while displayed on SPAIDEN or APAIDEN with the address, are not stored with the address in the Banner tables. Telephone numbers must be changed on the SPATELE or APATELE form, not the SPAIDEN or APAIDEN form.

6.4 Standard Change Record

- 07/31/2002 6.2.1.1 General Telephone Types
CL/FX changed to CE/FAX to match existing use in Banner
- 10/28/2002 6.2.3.1 Area Code
Clarified that converted phone numbers may not have an associated area code
- 08/01/2003 6.2.1.1 General Telephone Types
Added pager
- 6.2.1.2 Address Telephone Types
Added Alumni Billing, Entity Billing, Seasonal
- 6.2.2 Office(s) Responsible for Creation and Changes of Each Address Telephone Type
Added responsible office for new address types
- 6.3 Guidelines
Added that inactive box should be checked when end dating an address
- 08/13/2003 6.2.1.2 Address Telephone Types
Added Work Supplemental
- 6.2.2 Office(s) Responsible for Creation and Changes of Each Address Telephone Type
Added responsible office for new address types
- 12/08/2004 6.2.2 Office(s) Responsible for Creation and Changes of Each Address Telephone Type
Updated "Owner" names

7 Email

7.1 General

An entity (person or non-person) may have multiple email addresses within the Banner system. Email addresses should be accurate and reflect the most recent data received.

7.2 Standards

| CODE | DESCRIPTION |
|------|------------------------|
| PARN | Parent's Email Address |
| PERS | Personal Email Address |
| WORK | Work Email Address |

7.3 Guidelines

Only Campus Pipeline defined email addresses are to be maintained as EMU email addresses.

NOTE: EMU email addresses are maintained as address type EM and are not stored in the email form GOREMAL.

When adding a subsequent email address of the same type, the prior email address should be end dated and the new email address added. Unless making a correction due to an initial entry error, do not change or delete the prior email address.

7.4 Standard Change Record

| | |
|------------|--|
| 11/5/2002 | 7.2 Standards Added PARN – Parent's Email Address |
| 08/13/2003 | 7.2 Standards Added WORK – Work Email Address |
| 01/31/2006 | 7.2 Standards Deleted "EMU" from table (not being used) |

8 Calendar Dates

8.1 General

Date fields appear on forms throughout the Banner system.

Banner is set up to accept dates in the format MDY (Month, Day, Year).

Banner determines which parts of a date entry are the month, day, and year, and automatically converts and stores the date in the format DD-MON-CCYY

Year numbers 00 through 49 are converted to 2000 to 2049

Year numbers 50 through 99 are converted to 1950 to 1999

The century default can be overridden by typing in the 4-digit century and year

8.2 Standards

8.2.1 Year

Always enter four digits for the year

Example: Enter 2002 as 2002 – not 02

8.2.2 Month and day

Always enter two digits for the month and day.

Example: Enter January as 01
Enter the 5th day of the month as 05

You can enter a date without separators (no spaces or special characters) or you can use a dash (-) or slash (/) as separators.

Example: If you want to enter the date March 5, 2002, you can enter it any of the following ways:

03052002 03/05/2002 03-05-2002

In all cases, the date will be stored as: 05-MAR-2002

If you enter only part of the date, the rest of the current date is the default.

Example: If today's date is July 5, 2002 and you want to enter the date March 5, 2002, you can enter it any of the following ways:

03052002 0305 03

03/05/2002 03/05

03-05

In all cases, the date will be stored as: 05-MARCH-2002

If you enter a 't' in a date field and press <enter>, today's date will default in.

8.2.3 *Dates in Job Submission*

Use the DD-MON-CCYY or DD-MONTH-YY format to enter date parameters for reports and processes run with the Process Submission Control Form (GJAPCTL).

8.2.4 *Dates in Reports and Process Output*

Some, but not all, reports include the century with the year in their output.

8.2.5 *Dates in Query Mode*

Specify all four digits for a year when you query on a date field. For example, enter 26-JUN-2000, not 26-JUN-00. If you omit the century, zeros are entered for the century. In this example, if you enter 26-JUN-00, Banner expands the date to 26-JUNE-0000, not 26-JUN-2000.

8.3 *Guidelines*

8.4 *Standard Change Record*

9 Gender

9.1 General

Gender information is maintained for federal and state reporting purposes.

9.2 Standards

| Code | Description | Explanation |
|------|---------------|---|
| M | Male | A male person (man or boy) |
| F | Female | A female person (woman or girl) |
| N | Not Available | The gender information is not available or cannot be determined from the name (e.g., Chris, Pat, Kayon, etc.) |

9.3 Guidelines

A gender code is required for all persons in the Banner system.

9.4 Standard Change Record

07/16/2002 8.2 Standards
Changed from U (Unknown) to N (Not Available) based on Banner baseline values

10 Social Security Number (SSN)

10.1 General

The Social Security Number field in Banner is labeled: SSN/SIN/TFN

EMU's policy is that only a U.S. Social Security Number will be entered into this field.

A U.S. social security number is required for all Eastern Michigan University employees and independent contractors. It is preferred that students disclose their social security number, but it is only required for students applying for financial aid or employment. Social security number is an optional data element for all other constituents of the university.

10.2 Standards

Enter the entire 9-digit U.S. Social Security number, omitting dashes and spaces between numbers (e.g., 123456789).

10.3 Guidelines

A request to change your social security number in the EMU system must be made in person at the appropriate office, or by submitting your request via mail.

In order to change your social security number, you must present your Social Security Card that reflects your social security number (matching the name on record) to an appropriate office on campus.

Faculty: Academic Human Resources, 202 Boone Hall
Staff: Staff Human Resources, 140 McKenny Hall
Students: Office of Records and Registration, 303 Pierce Hall

A person must present his or her social security card in order to have their social security number changed within Banner. Professional judgment should be used when making corrections to social security numbers based on error at initial entry.

If a person is an EMU employee: Faculty will direct social security number change requests to Academic Human Resources, 202 Boone Hall and regular staff will direct social security number change requests to Staff Human Resources, 140 McKenny Hall. Students will direct social security number change requests to Office of Records and Registration. Alumni and Donors should direct their request to EMU Foundation's Advancement Services office.

10.4 Standard Change Record

12/08/2004 10.3 Guidelines
Changed Advancement Services name

11 Date of Birth

11.1 General

A date of birth is required for all EMU employees and is optional for students, alumni, friends and donors of the University. The date of birth is maintained on the General Person Form in each module (*PAPERS).

11.2 Standards

A date of birth will be entered into Banner in the format MM/DD/CCYY. Banner will display the date as: DD-MON-CCYY

Example:

Date of birth entered as: 11/20/1970
Will display as: 20-NOV-1970

11.3 Guidelines

Changes to a date of birth may originate in any office on campus. It is the responsibility of the department processing a change to a date of birth to check the GUASYST form in Banner and check if a person is an employee. If yes, it is the further responsibility of the department processing the change to notify Human Resources.

A copy of the birth certificate, passport or driver's license must be provided with all date of birth change requests. Professional judgment should be used when making corrections to dates of birth based on error at initial entry.

11.4 Standard Change Record

12 Marital Code

12.1 General

Marital status is maintained for all EMU students applying for financial aid, EMU employees and constituents of the University.

12.2 Standards

Marital status is maintained on the General Person record in each module.

| Code | Description | Explanation |
|------|--------------|--------------------------------------|
| D | Divorced | Legally divorced |
| L | Life Partner | Not married but considered a partner |
| M | Married | Legally married |
| P | Separated | Legally married, but separated |
| S | Single | Not married |
| U | Unknown | Marital status is unknown |
| W | Widowed | Widowed, and not remarried |

12.3 Guidelines

Changes to a marital status may originate in any office on campus.

A copy of marriage license or divorce decree must be provided with all marital status change requests. Professional judgment should be used when making corrections to marital status based on error at initial entry.

12.4 Standard Change Record

08/05/2002 11.2 Standards
Corrected information to indicate marital status is found on the SPAPERS form (not SPAIDEN)

13 Ethnic Codes

13.1 General

Ethnicity and Race are tracked for purposes of federal and state reporting requirements.

13.2 Standards

Race and ethnic codes are tracked in Banner according to both the old and new federal requirements. While the new federal requirements are being phased in, people may report this information to EMU using either the old style or new style question.

The old federal requirements report race and ethnicity as a single 'Ethnicity' code and is maintained in the Banner field called 'Ethnicity'. Valid values are:

| Old Ethnic/Race Codes | Description |
|-----------------------|-----------------------------------|
| AS | Asian |
| BL | Black, Non-Hispanic |
| HI | Hispanic |
| NA | American Indian or Alaskan Native |
| PI | Pacific Islander |
| WH | White, Non-Hispanic |
| NX | Not Reported |
| XX | Would Not Disclose |

The new federal requirements separate race and ethnicity into two separate categories. The new ethnicity codes are maintained in the Banner field called 'New Ethnicity'. Valid values are:

| New Ethnic Codes | Description |
|------------------|------------------------|
| Hispanic | Hispanic or Latino |
| Not Hispanic | Not Hispanic or Latino |
| None | Not reported |

Persons, who consider themselves multiracial, may now report multiple race codes. Valid values are:

| New Race Codes | Description |
|----------------|---|
| 1 | American Indian or Alaskan Native |
| 2 | Asian |
| 3 | Black or African American |
| 4 | Native Hawaiian and Other Pacific Islanders |
| 5 | Pacific Islander |
| 6 | White, Non-Hispanic |
| 7 | Not Reported |
| 8 | Would Not Disclose |

13.3 Guidelines

1. When a person responds to the old style ethnicity question, it is entered in the 'Ethnicity' field on Banner. The 'New Ethnicity' and 'Race' fields will be automatically populated by a crosswalk table.

Note: This only occurs if no ethnicity date currently exists for the person. If data already exists, you will need to translate the codes and enter the 'New Ethnicity' and 'Race' fields manually. See below.

| Banner Ethnic Code Validation/Cross-Walk (STVETHN) | | |
|--|------------------------|--|
| Ethnic Code | New Ethnicity | Race Code/Description |
| AS | Not Hispanic or Latino | 2 – Asian |
| BL | Not Hispanic or Latino | 3 – Black or African American |
| HI | Hispanic or Latino | 8 – Not Reported |
| NA | Not Hispanic or Latino | 1 – American Indian or Alaskan Native |
| *NX | None | 8 – Not Reported |
| PI | Not Hispanic or Latino | 4 – Native Hawaiian & Other Pacific Islander |
| WHI | Not Hispanic or Latino | 5 – White, Non-Hispanic |
| *XX | None | 9 – Would Not Disclose |

- When a person responds to the new style Race and Ethnicity questions, both the 'New Ethnicity' and 'Race' field(s) should be populated.

Ethnicity:

If 'Hispanic or Latino' = Yes

- Set New Ethnicity to 'Hispanic or Latino'
- Set Ethnicity to HI

If 'Not Hispanic or Latino' = Yes

- Set New Ethnicity to 'Not Hispanic or Latino'
- Set Ethnicity to match the Race selected. If multiple Races are selected, use the hierarchy below to determine the Ethnicity Code.

Ethnicity Hierarchy:

HI
NA
PI
BL
AS
WH
NX

If the person does not answer the Ethnicity question, leave the New Ethnicity field set to 'None' (default).

Race:

Set Race to the appropriate code(s) selected.

- If no Race is indicated – set the Race code to 'NX' – Not Reported.
- If a person has a value of 'NX' or 'XX' in the 'Race' field and then later supplies that information, the 'NX' and/or 'XX' should be deleted.

- Ethnicity and Race Confirmed:

When a person responds to the new style Race and Ethnicity question, the 'Ethnicity and Race Confirmed' box should be checked and the date the document was received should be entered in the 'Confirmed Date' field.

Note: Only check the 'Confirmed' box if the person responds to BOTH the Ethnicity and Race question.

13.4 Standard Change Record

- | | |
|------------|---|
| 12/13/2004 | 13.2 Standards Added standards for new federal reporting requirements for race and ethnicity |
| 09/20/2010 | 13.3 Guidelines Added more detail/clarification under Guidelines regarding new Race and Ethnicity coding |

14 Deceased Information

14.1 General

Due to the sensitivity of this issue, prompt attention is important so future mailings from University offices are discontinued. Deceased status must be verified information, not just perceived information.

The following offices have the authority to update deceased information in Banner.

| BANNER APPLICATION | OFFICE | CONTACT PERSON |
|---------------------------|--------------------------|--------------------|
| Human Resources (Staff) | Human Resources | Colleen Glaser |
| Human Resources (Faculty) | Academic Human Resources | Bonnie Emrick |
| Student | Ombudsman Office | Gregory A. Peoples |
| Advancement | Advancement Services | Garima Sharma |

14.2 Standards

All population selections for communication purposes must search for, and exclude, deceased persons.

An annual review of addresses for deceased persons will be conducted.

14.3 Guidelines

If you receive notification that a person has passed away, do the following:

- If a person is a current student (enrolled for the current term or future) or a current employee (PEAEMPL), send the information to the appropriate office for processing (see above).
- If the person is not a current student or current employee, decessate the person in Banner and inactivate his/her mailing address, email addresses and phone numbers.
- **DO NOT change the person's name to "To the estate of"**
- Using email, notify the contact person for each of the following offices. Include the following information in your email:
 - Name of Person, Banner ID, Date of Death (if known), and how you found out about it.

| BANNER APPLICATION | OFFICE | CONTACT PERSON | EMAIL ADDRESS |
|--------------------|----------------------|--------------------|--|
| Admissions | Office of Admissions | Ann Richards | ann.richards@emich.edu |
| Advancement | Advancement Services | Garima Sharma | emu.foundation@emich.edu |
| Human Resources | Human Resources | Colleen Glaser | cglaser@emich.edu |
| Human Resources | Academic HR | Bonnie Emrick | bemrick@emich.edu |
| Financial Aid | Financial Aid | Cynthia VanPelt | cvanpelt@emich.edu |
| Finance | Finance | Tammy Walters | twalters1@emich.edu |
| Student | Ombudsman Office | Gregory A. Peoples | gpeoples@emich.edu |
| Security | DoIT | Lynn Dorendorf | ldorendorf@emich.edu |

14.4 Standard Change Record

| | |
|------------|--|
| 08/05/2002 | 14.2 Standards Added standard that all population selections are to search for, and exclude, deceased persons Added annual review and end dating of addresses |
| 12/08/2004 | 14.3 Guidelines Corrected entries Added ICT Security contact |
| 10/11/2006 | 14.3 Guidelines Added DO NOT change the person's name to "To the estate of" |
| 09/20/2010 | 14.1 General Added who has authority to update deceased Information in Banner 14.3 Guidelines Reformatted Changed procedure so that all listed departments are notified instead of only the ones listed on GUASYST |

15 Prefix Codes – Names

15.1 General

A prefix represents a title that precedes a name.

15.2 Standards

15.2.1 Default Prefix

If a person does not indicate a preference for a prefix and the person's gender is known, enter 'Mr' for a male or 'Ms' for a female. (Exceptions can be made if person requests no prefix be used.)

15.2.2 Sample Prefixes

The following list of prefixes is not exhaustive. See the Abbreviation section of Webster's Dictionary for additional options.

| | |
|-------|----------------|
| Dr | Doctor |
| Fr | Father |
| Gov | Governor |
| Hon | Honorable |
| Judge | Judge |
| Miss | Miss |
| Mr | Mister |
| Mrs | Mistress |
| Ms | Miss or Madame |
| Pres | President |
| Prof | Professor |
| Rabbi | Rabbi |
| Rep | Representative |
| Rev | Reverend |
| Sen | Senator |

15.3 Guidelines

A prefix is required for all persons defined in Banner if the person's gender is known or if the person has indicated a preferred prefix. (Exceptions can be made if person requests no prefix be used.) Prefixes will be entered in upper/lower case with no punctuation.

15.4 Standard Change Record

16 Suffix Codes – Names

16.1 General

A suffix is a professional designation that follows a name. Normally, suffixes are used with constituent names.

16.2 Standards

If a suffix is known, use the following guidelines. This list is not exhaustive. See the abbreviation section of Webster's Dictionary for additional choices.

| | |
|----------|-------------------------------|
| CEO | Chief Executive Officer |
| CFO | Chief Financial Officer |
| CPA | Certified Public Accountant |
| DC | Doctor of Chiropractic |
| Dean | Dean |
| Director | Director |
| DDS | Dentist |
| DMD | Doctor of Dental Medicine |
| DO | Doctor of Osteopathy |
| DVM | Doctor of Veterinary Medicine |
| Esq | Esquire |
| JD | Juris Doctor |
| LLD | Doctor of Laws |
| MD | Doctor of Medicine |
| OD | Doctor of Optometry |
| PhD | Doctor of Philosophy |
| Ret | Retired |
| RN | Registered Nurse |

16.3 Guidelines

Generational designators such as Jr, Sr, II, III, etc. are not considered suffixes in Banner and are instead included with the person's last name (see Section 3.2.8).

16.4 Standard Change Record

17 Citizenship and International Persons Information

17.1 General

Citizenship is required information for students and employees at EMU. Additional information, such as country of citizenship and visa status, is required for any person who is not a citizen of the United States.

Citizenship and related information is maintained by the following offices:

| | |
|----------------------------------|--|
| Human Resources | For non-academic employees of EMU |
| Academic Human Resources | For academic employees of EMU |
| Office of Admissions | For persons applying as students |
| Office of International Students | For students after they enroll. Also tracks information on certain non-citizens in the area who are not associated with EMU. |
| EMU Foundation | For constituents who are not EMU employees, students or student applicants. |

Any changes to citizenship or visa information must be coordinated with the appropriate offices as identified by checking the Banner form GUASYST.

17.2 Standards

17.2.1 U.S. Citizen Type

A person's citizenship is entered and maintained on the General Person form in each module using the following values:

| Banner Code | Description |
|-------------|---|
| Y | Yes – This person is a U.S. citizen |
| N | No – This person is not a U.S. citizen (includes permanent residents with a green card) |
| Blank | Unknown |

Citizenship is used in IPEDS reporting for Human Resources.

17.2.2 Country of Citizenship

Country of citizenship is maintained on the General Person form in each module. The country codes are the same as those used for addresses.

17.2.3 Visa Status

Visa status is maintained for all non U.S. citizens. Visa status for students is established by the Office of Admissions and maintained by the Office of International Students.

17.3 Guidelines

If the person is a student or an employee, this information is required. If the person is a constituent and not a student or employee, this field may be left blank to indicate U.S. citizenship is not known.

17.4 Standard Change Record

| | |
|------------|--|
| 12/08/2004 | 16.1 General Updated EMU Foundation entry |
| 01/31/2006 | 16.1 General Corrected name of Office of International Students |

18 Veteran Information

18.1 General

Veteran information is maintained by the following offices:

| | |
|---------------------------|----------------------------------|
| Human Resources | For regular employees of EMU |
| Academic Human Resources | For academic employees of EMU |
| Office of Admissions | For persons applying as students |
| Office of Veteran Affairs | For students after they enroll |

18.2 Standards

18.2.1 Veteran File Number

Veteran File Number (Veteran ID) is maintained on the SPAPERS form in General Person. This is most often the veteran's social security number, but not always. This field is entered initially by the Office of Admissions and updated as necessary by the Office of Veteran's Affairs.

18.2.2 Veteran Category

Information is collected and maintained for regular employees by Human Resources. Data is entered on the PPAIDEN form in Human Resources/Payroll. SPAPERS form in General Person stores the data.

| | |
|---------------------------------------|--|
| None | Non-Veteran |
| Other Protected Veteran Only | Other Eligible Veterans that did not serve in Vietnam |
| Vietnam Veteran Only | Vietnam veterans who do not meet the criterion for Other Eligible Veterans |
| Both Vietnam & Other Eligible Veteran | Vietnam veterans who meet the criterion for Other Eligible Veterans |
| Active Duty Separation Date | The date that the person was separated from active duty |
| Special Disabled Veteran | Indicator to identify person as special disabled veteran |

18.3 Guidelines

Any changes to veteran information must be coordinated with the appropriate offices as identified by checking the Banner form GUASYST.

18.4 Standard Change Record

| | |
|------------|---|
| 08/05/2002 | 18.2 Standards Changed subheadings to 18.2.1 Veteran File Number and 18.2.2 Veteran Category to match the SPAPERS record Added text to section 18.2.1 regarding input of data |
| 04/09/2008 | 18.2.2 Veteran Category Updated |

19 Legacy Information (Full information to be included at a later date)

19.1 General

The application for admission used by the Office of Admissions asks if the applicant's parents are EMU alumni and what year they graduated. This information will be stored in Banner and shared with the EMU alumni office.

19.2 Standards

19.3 Guidelines

19.4 Standard Change Record

20 Religion Codes

20.1 General

The University will NOT collect or maintain religion data.

20.2 Standards

20.3 Guidelines

20.4 Standard Change Record

21 Driver's License Information

21.1 General

Human Resources maintains driver's license information, only if required for the position.

21.2 Standards

Enter the driver's license number as it appears on the license. Do not include the state which issued the license in the license number field. Do enter the state which issued the license in the state field.

21.3 Guidelines

Financial Aid also collects driver's license numbers from the filing of the FAFSA, but these do not become part of the student record.

21.4 Standard Change Record

22 Confidentiality of Student Records

22.1 General

STATEMENT OF RESPONSIBILITY FOR CONFIDENTIALITY OF STUDENT RECORDS

Security and confidentiality are a matter of concern to all persons who have access to student information. Each person using student information holds a position of trust relative to this data and must recognize the responsibilities delegated to him or her in preserving the security and confidentiality of this information. Since conduct either on or off the job could affect the security and confidentiality of this information, each person authorized to access student information is expected to adhere to the following standards.

22.2 Standards

Confidential Information Indicator

If a student completes a "Request for Confidential Information" form and submits it to the Office of Records and Registration, the student's directory information WILL NOT be disclosed to the public. The Office of Records and Registration will flag the student's record with a confidentiality indicator and the message CONFIDENTIAL will display in the upper left corner on any Banner form with the ID in the Key information. If a constituent wishes to request confidentiality, a written request should be submitted to the EMU Foundation Advancement Services Office. The confidentiality indicator for donor information is maintained by the use of the confidentiality indicator.

The specific directory information requested to remain confidential will be entered on the SPACMNT (Comment) form in General Person for students and APACOMT for constituents and organizations using the following Comment Type codes:

| | |
|-----|-----------------------------------|
| XAC | Co-Curricular/Athletic Activities |
| XAD | Address |
| XAL | All Info |
| XBD | Birth date |
| XDG | Degrees or Awards |
| XDR | Published Directory Exclusion |
| XEM | E-mail Address |
| XEN | Enroll, Attend, Student Level |
| XIN | Most Recent Prior Institution |
| XMJ | Major |
| XNA | All Name(s) |
| XPH | Phone Number |

Once restrictions are in place they can be removed only by the written request of the student or donor.

22.3 Guidelines

22.3.1 FERPA

The Family Educational Rights and Privacy Act of 1974, establishes requirements regarding the privacy of student records. FERPA governs:

- Release of "education" records maintained by an educational institution.
- Access to these records.

22.3.2 Directory Information

Based on FERPA guidelines as outlined in the EMU Access to Student Records policy, "Directory Information" for enrolled students is eligible for release unless the student requests that it be held confidential. Eastern Michigan University designates the following student information as "Directory Information":

Student name, address, telephone number, e-mail address, date and place of birth, major, participation in officially recognized sports and activities, weights and heights of athletes, dates of attendance, degrees and awards received and the name of the most recent previous institution.

22.3.3 Disclosure Policies

All personally identifiable information not covered under "Directory Information" is confidential and shall be disclosed by the University only as provided in University Policies. No information, "public" or private, on applicant records may be released outside of the University until the applicant has become a registered student and has a chance to prohibit release, except to agents designated by the applicant.

Students are notified on an annual basis of their rights under FERPA, including the right to request that directory information be restricted. Eastern Michigan University reserves the right to make directory information public unless the student has filed a "Request for Confidential Information" form with the Office of Records and Registration.

22.3.4 Directory Exclusion

If a student completes a "Directory Exclusion" request form and submits it to the Office of Public Information, their name, address and phone number WILL NOT be included in the annual EMU Student Directory and this information WILL NOT be disclosed to the public. The student's record will be flagged with a confidentiality indicator and the message CONFIDENTIAL will display in the upper left corner on any Banner form with the ID in the Key information. A Comment Type code of "XDR" will be entered on the SPACMNT (Comment) form in General Person.

22.4 Standard Change Record

| | |
|------------|---|
| 12/08/2004 | 22.2 Standards Refined Advancement description |
| 02/22/2006 | 22.3.4 Directory Exclusion Changed Comment Type Code from "DIR" to "XDR" |

23 Letter Names

23.1 General

The names of letters created within any module of Banner are stored in a common validation table called GTVLETR. Letter names are 15 characters.

23.2 Standards

In order to avoid confusion as to the owner of a letter defined within Banner, the following prefixes will be used by offices when defining a letter name on the Banner screen GTVLETR:

| | |
|---------|--|
| AD_ | Office of Admissions |
| ADV_ACK | Advancement – Gifts and Records' Gift Area |
| ADV_ALU | Advancement – Alumni Relations |
| ADV_DEV | Advancement – Development |
| ADV_GR | Advancement – Gifts and Records |
| FA_ | Office of Financial Aid |
| FN_AC_ | Finance – Office of Accounting |
| FN_AP_ | Finance-Accounts Payable Office |
| FN_PP_ | Finance-Purchasing & Procurement Office |
| FN_AR_ | Finance-Accounts Receivable Office |
| HR_ | Human Resources |
| PY_ | Payroll |
| RR_ | Office of Records & Registration |
| SB_CA_ | Student Business Services – Cashier's Office |
| SB_SA_ | Student Business Services – Student Accounting |
| SB_SL_ | Student Business Services – Student Loans Office |

23.3 Guidelines

23.4 Standard Change Record

24 Quickflow Names

24.1 General

The names of quickflows created within any module of Banner are stored in a common validation table called GTVQUIK. Quickflow names are 4 characters.

24.2 Standards

In order to avoid confusion as to the owner of a quickflow defined within Banner, the following prefixes will be used by offices when defining a quickflow name on the Banner screen GTVQUIK:

| | |
|----|--|
| AC | Finance-Office of Accounting |
| AD | Office of Admissions |
| AP | Finance-Accounts Payable Office |
| AR | Finance-Accounts Receivable Office |
| AV | Advancement |
| CA | Student Business Services – Cashier’s Office |
| FA | Office of Financial Aid |
| HR | Human Resources |
| IS | Office of International Students |
| PP | Finance-Purchasing & Procurement Office |
| PY | Payroll |
| RR | Office of Records & Registration |
| SA | Student Business Services – Student Accounting |
| SL | Student Business Services – Student Loans Office |

24.3 Guidelines

24.4 Standard Change Record

| | |
|------------|-------------------------------|
| 10/28/2002 | Section created |
| 06/21/2006 | 24.2 Standards Added “IS_” |

APPENDIX A – Data Standards Change Request Form

The Data Standards Change Request Form is to be used to request changes to the Data Standards in use at Eastern Michigan University. The form asks for justification for the change, what other area(s) will be impacted by the change, how will those other area(s) be affected, who will be the data steward for the proposed change, if applicable, and who will maintain the change, if applicable. The Banner application area generating a change request must get the signature of the Data Standards Committee member representing that module. The Data Standards Committee will then consider the request and either incorporate the changes into the Data Standards Manual or return the request with any questions.

Standards will not be created for things we ‘think’ might be needed. When a need is realized, as justified by the Data Standards Change Request Form, then it will be added to the Data Standards and distributed for use.

CURRENT DATA STANDARDS COMMITTEE MEMBERS:

| Committee Member | Banner Module(s) Represented |
|---------------------------|--|
| Bonnie Emrick | Academic Human Resources |
| Garima Sharma | Advancement |
| John Gelsomino | Division of Information Technology (DoIT), Technical Considerations |
| Jody Cebina | Extended Programs & Educational Outreach |
| Tammy Walters | Finance |
| Elizabeth Eicher | Financial Aid |
| Don Lund, Committee Chair | Institutional Research and Information Management |
| Susan Sohn / Esther Gunel | Office of International Students |
| Rhonda Linderman | Payroll |
| Cynthia Howie | Purchasing |
| Colleen Glaser | Staff Human Resources |
| TBD | Student – Accounts Receivable |
| Maryann Shichtman | Student – Admissions & Recruiting |
| Sherry Winterson | Student – Records & Registration, Academic History, Faculty Load, Buildings & Facilities |

25.1 Data Standards Change Request Form

SUBMITTED BY:
BANNER APPLICATION AREA:
DATE:

REQUESTED CHANGE:

JUSTIFICATION:

OTHER MODULE(S) AFFECTED:

- Student Financial Aid Finance Human Resources
 Advancement Other

How are they affected?

WHO WILL BE THE STEWARD FOR THIS DATA?

WHO WILL MAINTAIN THIS DATA?

SUPPORT FOR CHANGE:

DATA STANDARDS COMMITTEE MEMBER:

Accepted by: _____ Date: _____

Name printed: _____

DATA STANDARDS COMMITTEE RESOLUTION:

- Change Accepted
 Change Rejected
 Further Information Needed
Explanation:

26 APPENDIX B – Shared Tables in Banner as of 07/01/2002

This appendix contains four tables:

TABLE 1: Shared Data Tables

TABLE 2: Shared Validation Tables

TABLE 3: Data Stewards for Shared Validation Tables

TABLE 4: Shared Data Items

26.1 Table 1: Shared Data Tables

| Table | Description | Student | Financial Aid | Alumni & Development | Finance | Human Resources |
|---------|----------------------|---------|---------------|----------------------|---------|-----------------|
| SPRIDEN | Identification Table | X | X | X | X | X |
| SPRADDR | Address | X | X | X | X | X |
| SPBPERS | Person Information | X | X | X | X | X |
| SPRTELE | Telephone | X | X | X | X | X |
| GOREMAL | Email | X | X | X | X | X |

26.2 Table 2: Shared Validation Tables

'X' – indicates a module uses the table

'XS' – indicates the Module which is the Data Steward for the table

See TABLE 3 for information on who to contact to update a table. If a table does not have a data steward identified, and you wish to establish a use for it, contact the Data Standards Committee.

| Table | Description | Student | Financial Aid | Alumni & Development | Finance | Human Resources |
|---------|-------------------------------|---------|---------------|----------------------|---------|-----------------|
| FTVACCI | Account Index Code | | | X | XS | X |
| FTVACCT | Account Code | | | X | XS | X |
| FTVACTV | Activity Code | | | X | XS | X |
| FTVCOAS | Chart of Account | | | X | XS | X |
| FTVFUND | Fund Code | | | X | XS | X |
| FTVLOCN | Location Code | | | X | XS | X |
| FTVOBUD | Budget ID and Phase | | | | XS | X |
| FTVORGN | Organization Code | | X | X | XS | X |
| FTVPROG | Program Code | | | X | XS | X |
| | | | | | | |
| GTVADID | Add-In Code | XS | X | X | X | X |
| GTVEMAL | Email Type | XS | X | X | | |
| GTVEXPN | Expenses | X | X | X | | |
| GTVLETR | Letter Code | X | X | X | X | X |
| GTVMAIL | Mail Type | X | X | XS | | |
| GTVNTYP | Name Type | X | X | XS | | |
| GTVPARA | Paragraph Code | X | X | X | X | X |
| GTVRRAC | Race Code Validation | XS | | | | X |
| GTVSCOD | EDI/ISO Standard Code | XS | X | X | X | X |
| GTVSUBJ | Subject Index | X | X | X | | |
| GTVZIPC | ZIP/Postal Code | XS | X | X | X | X |
| GXRBank | Bank Code Rule Form | | | | XS | X |
| GXVDIRD | Bank Routing Number | | | | XS | X |
| | | | | | | |
| NTVACAT | Approval Category Code | | | | | XS |
| NTVAGRP | Electronic Approval Groups | | | | | XS |
| NTVAPTY | Approval Type Code | | | | | XS |
| | | | | | | |
| SOATBRK | Student Term Break Form | XS | X | | | |
| STVACCG | Activity Category | X | X | XS | | X |
| STVACTC | Activity Code | X | | XS | | |
| STVACTP | Activity Type | X | | XS | | |
| STVACYR | Academic Year Code | XS | X | | | |
| STVADMT | Admission Type | XS | X | | | |
| STVAPDC | Admissions App Decision Codes | XS | X | | | |
| STVAPST | Admission Application Status | XS | X | | | |
| STVASCD | Room Assignment Status | XS | X | | | |
| STVASRC | Address Source | XS | | X | X | |
| STVASTD | Academic Standing | XS | X | | | |
| STVATYP | Address Type Code | XS | X | X | X | X |
| STVBLDG | Building | XS | X | X | | |
| STVCAMP | Campus Code | XS | X | X | | |
| STVCIPC | CIPC Code | XS | | | | X |
| STVCITZ | Citizen Type Code | XS | X | X | | X |
| STVCLAS | Class Code | XS | X | | | |
| STVCNTY | County Code | XS | X | X | X | X |

| Table | Description | Student | Financial Aid | Alumni & Development | Finance | Human Resources |
|----------|--------------------------------|---------|---------------|----------------------|---------|-----------------|
| STVCOLL | College Code | XS | X | X | | X |
| STVCOMT | Committee/Service Type | X | | | | X |
| STVCTYP | Contact Type | XS | X | | | |
| STVDAYS | Days of the Week | XS | X | | | X |
| STVDEGC | Degree Code | XS | X | X | | X |
| STVDEGS | Degree Status | XS | X | | | |
| STVDEPT | Department Code | XS | | X | | |
| STVDIVS | Division | X | X | | | XS |
| STVDLEV | Degree Level | XS | | | | X |
| STVDPLM | Diploma Type | XS | X | | | |
| STVEMPT | Employment Type | XS | X | | | |
| STVESTS | Enrollment Status | XS | X | | | |
| STVETCT | IPEDS Ethnic Code | XS | | | | X |
| STVETHN | Ethnic Code | XS | X | X | | X |
| STVETYP | Event Type | X | | XS | | |
| STVGEOD | Geographic Region Division | XS | | X | | |
| STVGEOR | Geographic Region Code | XS | | X | | |
| STVGMOD | Grading Mode Code | XS | X | | | |
| STVHAPS | Housing Application Status | XS | X | | | |
| STVHLDD | Hold Type | XS | X | | | |
| STVHOND | Departmental Honors Code | XS | X | X | | X |
| STVHONR | Institutional Honors Code | XS | | X | | |
| STVINIT | Initials Code | XS | | X | | |
| STVLANG | Language | XS | | | | X |
| STVLEAD | Leadership | X | | XS | | |
| STVLEVL | Level Code | XS | X | | | X |
| STVLGCY | Legacy | XS | | X | | X |
| STVMAJR | Major/Minor/Concentration Code | XS | X | X | | X |
| STVMATL | Material Code | XS | | | | |
| STVMDEQ | Medical Equipment Code | X | | | | X |
| STVMEDI | Medical Code | X | | | | X |
| STVMRCD | Meal Rate | XS | X | | | |
| STVMRTL | Marital Status Code | X | X | X | | XS |
| STVMSCD | Meal Assignment Status | XS | X | | | |
| STVNATN | Nation Code | XS | X | X | X | X |
| STVORIG | Originator Code | X | | X | | |
| STVPENT | Port of Entry Code | XS | | | | X |
| STVRATE | Student Fee Assessment Code | XS | X | | | |
| STVRDEF | Building/Room Attribute | XS | X | | | |
| STVRELG | Religion Code | X | | X | | X |
| STVRELT | Relation Code | X | | | | XS |
| STVRMST | Room Status | XS | X | | | |
| STVRRCD | Room Rate | XS | X | | | |
| STVRSTS | Course Registration Status | XS | X | | | |
| STVSBGI | Source/Background Institution | XS | X | X | | X |
| STVSITE | Site | XS | X | | | |
| STVSPON | International Student Sponsor | XS | X | | | |
| STVSTAT | State/Province Code | XS | X | X | X | X |
| STVSTST | Student Status | XS | X | | | |
| STVTADM | Test Score Administration Type | XS | X | | | |
| STVTELE | Telephone Type | XS | X | X | X | X |
| STVTEPR | Test Purpose | XS | X | | | |
| STVTERM | Term Type | XS | X | | | |
| STVTESE | Test Code | XS | X | | | |
| STVTSRC | Admission Test Score Source | XS | X | | | |
| STVVETC | Veteran Type | XS | X | | | |
| STVVITYP | VISA Type | XS | | | | X |

| Table | Description | Student | Financial Aid | Alumni & Development | Finance | Human Resources |
|---------|---------------------------------|---------|---------------|----------------------|---------|-----------------|
| STVWAIV | Application Fee Waiver Code | XS | X | X | X | X |
| STVWDRL | Student Withdrawal Status Codes | XS | X | | | |
| | | | | | | |
| TSACONT | Contract Authorization Form | XS | X | | | |
| TSADETC | Detail Code Control Form | XS | X | | | |
| TSAEXPT | Exemption Authorization Form | XS | X | | | |
| | | | | | | |
| TVVAUTH | Authorization Validation Form | XS | X | | | |
| TTVBILL | Billing Code | XS | X | | | |
| TTVDCAT | Detail Category | XS | X | | | |
| TTVPAYT | Payment Type | XS | X | | | |
| TTVSRCE | Charge/Payment Detail Source | XS | X | | | |
| | | | | | | |
| GURAPAY | Accounting Feed AP Table | X | | | XS | X |
| GURFEED | Finance Transaction Input Table | X | | | XS | X |

26.3 Table 3: Data Stewardship of Banner Tables

This table indicates the specific department acting as the Data Steward for a Shared Validation Table and who to contact to request a change. The Data Steward of that table will work with the department requesting the change and the Data Standards Committee to evaluate the requested change and, if approved, update the table.

If the Data Standards Committee is indicated as the 'Data Steward', that means the table is not currently in use, or is used by multiple areas equally. Contact a member of the Committee to initiate use of such a table.

| Table | Description | Data Steward | Contact Information |
|---------|-------------------------------|----------------------------------|---------------------|
| FTVACCI | Account Index Code | Accounting | Timothy Griffith |
| FTVACCT | Account Code | Accounting | Timothy Griffith |
| FTVACTV | Activity Code | Accounting | Timothy Griffith |
| FTVCOAS | Chart of Account | Accounting | Timothy Griffith |
| FTVFUND | Fund Code | Accounting | Timothy Griffith |
| FTVLOCN | Location Code | Accounting | Timothy Griffith |
| FTVOBUD | Budget ID and Phase | Accounting | Timothy Griffith |
| FTVORGN | Organization Code | Accounting | Timothy Griffith |
| FTVPROG | Program Code | Accounting | Timothy Griffith |
| | | | |
| GTVADID | Add-In Code | Admissions | Maryann Shichtman |
| GTVEMAL | Email Type | Records & Registration | Sherry Winterson |
| GTVEXPN | Expenses | Advancement | Annette Rurka |
| GTVMAIL | Mail Type | Advancement | Annette Rurka |
| GTVNTYP | Name Type | Advancement | Annette Rurka |
| GTVRRAC | Race Code Validation | Admissions | Maryann Shichtman |
| GTVSCOD | EDI/ISO Standard Code | Office of International Students | Esther Gunel |
| GTVSUBJ | Subject Index | Advancement | Annette Rurka |
| GTVZIPC | ZIP/Postal Code | Records & Registration | Sherry Winterson |
| GXRANK | Bank Code Rule Form | Accounting | Timothy Griffith |
| GXVDIRD | Bank Routing Number | Accounting | Timothy Griffith |
| | | | |
| NTVACAT | Approval Category Code | Academic HR | Bonnie Emrick |
| NTVAGRP | Electronic Approval Groups | Academic HR | Bonnie Emrick |
| NTVAPTY | Approval Type Code | Academic HR | Bonnie Emrick |
| | | | |
| SOATBRK | Student Term Break Form | Records & Registration | Ramona Milligan |
| STVACCG | Activity Category | Advancement | Annette Rurka |
| STVACTC | Activity Code | Advancement | Annette Rurka |
| STVACTP | Activity Type | Advancement | Annette Rurka |
| STVACYR | Academic Year Code | Records & Registration | Sherry Winterson |
| STVADMT | Admission Type | Admissions | Maryann Shichtman |
| STVAPDC | Admissions App Decision Codes | Admissions | Maryann Shichtman |
| STVAPST | Admission App Status | Admissions | Maryann Shichtman |
| STVASCD | Room Assignment Status | Housing | Colleen Tompkins |
| STVASRC | Address Source | Admissions | Maryann Shichtman |
| STVASTD | Academic Standing | Records & Registration | Chris Shell |
| STVATYP | Address Type Code | Records & Registration | Sherry Winterson |

| Table | Description | Data Steward | Contact Information |
|---------|-----------------------------|----------------------------------|-------------------------------------|
| STVBLDG | Building | Records & Registration / Housing | Ramona Milligan Colleen Tompkins |
| STVCAMP | Campus Code | Student Business Services | TBD |
| STVCIPC | CIPC Code | Records & Registration | Chris Shell |
| STVCITZ | Citizen Type Code | Admissions | Maryann Shichtman |
| STVCLAS | Class Code | Records & Registration | Chris Shell |
| STVCNTY | County Code | Records & Registration | Sherry Winterson |
| STVCOLL | College Code | Records & Registration | Chris Shell |
| STVCOMT | Committee/Service Type | Records & Registration | Chris Shell |
| STVCTYP | Contact Type | Admissions | Maryann Shichtman |
| STVDAYS | Days of the Week | Records & Registration | Ramona Milligan |
| STVDEGC | Degree Code | Records & Registration | Chris Shell |
| STVDEGS | Degree Status | Records & Registration | Chris Shell |
| STVDEPT | Department Code | Records & Registration | Chris Shell |
| STVDIVS | Division | Human Resources | Colleen Glaser |
| STVDLEV | Degree Level | Records & Registration | Chris Shell |
| STVDPLM | Diploma type | Admissions | Maryann Shichtman |
| STVEMPT | Employment Type | Office of International Students | Esther Gunel |
| STVESTS | Enrollment Status | Records & Registration | Ramona Milligan |
| STVETCT | IPEDS Ethnic Code | IRIM/Admissions/HR | Don Lund/Maryann Shichtman |
| STVETHN | Ethnic Code | Admissions | Maryann Shichtman |
| STVETYP | Event Type | Advancement | Annette Rurka |
| STVGEOD | Geographic Region Division | Admissions | Maryann Shichtman |
| STVGEOR | Geographic Region Code | Admissions | Maryann Shichtman |
| STVGMOD | Grading Mode Code | Records & Registration | Chris Shell |
| STVHAPS | Housing Application Status | Housing | Colleen Tompkins |
| STVHLDD | Hold Type | Records & Registration | Sherry Winterson |
| STVHOND | Departmental Honors Code | Records & Registration | Chris Shell |
| STVHONR | Institutional Honors Code | Records & Registration | Chris Shell |
| STVINIT | Initials Code | Admissions | Maryann Shichtman |
| STVLANG | Language | Office of International Students | Esther Gunel |
| STVLEAD | Leadership | Advancement | Annette Rurka |
| STVLEVL | Level Code | Records & Registration | Sherry Winterson |
| STVLGCY | Legacy | Admissions | Maryann Shichtman |
| STVMAJR | Major/Minor/Conc. Code | Records & Registration | Chris Shell |
| STVMDEQ | Medical Equipment Code | Not used | |
| STVMEDI | Medical Code | Not used | |
| STVMRCD | Meal Rate | Housing | Colleen Tompkins |
| STVMRTL | Marital Status Code | Human Resources | Colleen Glaser |
| STVMSCD | Meal Assignment Status | Housing | Colleen Tompkins |
| STVNATN | Nation Code | Office of International Students | Esther Gunel |
| STVORIG | Originator Code | Records & Registration | Sherry Winterson |
| STVPENT | Port of Entry Code | Office of International Students | Esther Gunel |
| STVRATE | Student Fee Assessment Code | Student Business Services | TBD |
| STVRDEF | Building/Room Attribute | Records & Registration / Housing | Ramona Milligan Colleen Tompkins |
| STVRELG | Religion Code | Not used | |

| Table | Description | Data Steward | Contact Information |
|---------|---------------------------------|----------------------------------|-------------------------------------|
| STVRELT | Relation Code | Human Resources | Colleen Glaser |
| STVRMST | Room Status | Records & Registration / Housing | Ramona Milligan Colleen Tompkins |
| STVRRCD | Room Rate | Housing | Colleen Tompkins |
| STVRSTS | Course Registration Status | Records & Registration | Ramona Milligan |
| STVSBGI | Source/Background Institution | Admissions | Maryann Shichtman |
| STVSITE | Site | Records & Registration | Ramona Milligan |
| STVSPON | International Student Sponsor | Admissions | Maryann Shichtman |
| STVSTAT | State/Province Code | Records & Registration | Sherry Winterson |
| STVSTST | Student Status | Records & Registration | Ramona Milligan |
| STVTADM | Test Score Administration Type | Admissions | Maryann Shichtman |
| STVTELE | Telephone Type | Records & Registration | Sherry Winterson |
| STVTEPR | Test Purpose | Admissions | Maryann Shichtman |
| STVTERM | Term Type | Records & Registration | Sherry Winterson |
| STVTESC | Test Code | Admissions | Maryann Shichtman |
| STVTSRC | Admission Test Score Source | Admissions | Maryann Shichtman |
| STVVETC | Veteran Type | Records & Registration | Sherry Winterson |
| STVVYYP | VISA Type | Office of International Students | Esther Gunel |
| STVWAIV | Application Fee Waiver Code | Admissions | Maryann Shichtman |
| STVWDRL | Student Withdrawal Status Codes | Records & Registration | Ramona Milligan |
| | | | |
| TSACONT | Contract Authorization Form | Student Business Services | TBD |
| TSADETC | Detail Code Control Form | Student Business Services | TBD |
| TSAEXPT | Exemption Authorization Form | Student Business Services | TBD |
| TVVAUTH | Authorization Validation Form | Student Business Services | TBD |
| | | | |
| TTVBILL | Billing Code | Student Business Services | TBD |
| TTVDCAT | Detail Category | Student Business Services | TBD |
| TTVPAYT | Payment Type | Student Business Services | TBD |
| TTVSRCE | Charge/Payment Detail Src | Student Business Services | TBD |
| | | | |
| GURAPAY | Accounting Feed AP Table | Accounting | Timothy Griffith |
| GURFEED | Finance Transaction Input Table | Accounting | Timothy Griffith |

26.4 Table 4: Shared Data Items

| Item | HR Used on: | Student Used on: | Fin. Aid Used on: | Finance Used on: | Alumni Used on: | Rule/Val. Table |
|------------------------------|-------------|------------------|-------------------|------------------|-----------------|-------------------------|
| ID Number | PPAIDEN | SPAIDEN | | FOAIDEN | APAIDEN | None |
| Name Information | PPAIDEN | SPAIDEN | SPAIDEN | FOAIDEN | APAIDEN | None |
| Name Type | PPAIDEN | SPAIDEN | SPAIDEN | FOAIDEN | APAIDEN | GTVNTYP |
| SSN | PPAIDEN | SPAPERS | SPAPERS | FOAPERS | APAPERS | None |
| Date of Birth | PPAIDEN | SPAPERS | SPAPERS | FOAPERS | APAPERS | None |
| Ethnicity | PPAIDEN | SPAPERS | SPAPERS | FOAPERS | APAPERS | STVETHN & PTRETHN |
| Gender | PPAIDEN | SPAPERS | SPAPERS | FOAPERS | APAPERS | None - Fixed at M, F, N |
| Marital* | PPAIDEN | SPAPERS | SPAPERS | FOAPERS | APAIDEN | STVMRTL |
| Citizenship | PPAIDEN | SPAPERS | SPAPERS | FOAPERS | APAPERS | STVCITZ |
| Deceased Information | PPAIDEN | SPAPERS | SPAPERS | FOAPERS | APAPERS | None |
| Address Information* | PPAIDEN | SPAPERS | | FOAPERS | APAIDEN | None |
| Address Type | PPAIDEN | SPAIDEN | | FOAIDEN | APAIDEN | STVATYP |
| Address Sequence | PPAIDEN | SPAIDEN | | FOAIDEN | APAIDEN | None |
| Address Lines | PPAIDEN | SPAIDEN | | FOAIDEN | APAIDEN | None |
| Address City | PPAIDEN | SPAIDEN | | FOAIDEN | APAIDEN | None |
| Address County | PPAIDEN | SPAIDEN | | FOAIDEN | APAIDEN | STVCNTY |
| Address State | PPAIDEN | SPAIDEN | | FOAIDEN | APAIDEN | STVSTAT |
| Address Zip | PPAIDEN | SPAIDEN | | FOAIDEN | APAIDEN | GTVZIPC |
| Address Nation | PPAIDEN | SPAIDEN | | FOAIDEN | APAIDEN | STVNATN |
| Address Source | PPAIDEN | SPAIDEN | | FOAIDEN | APAIDEN | STVASRC |
| Phone Information | PPAIDEN | SPAIDEN | | FOAIDEN | APAIDEN | None |
| Phone Type | PPAIDEN | SPAIDEN | | FOAIDEN | APAIDEN | STVTELE |
| Driver's License Information | PPAIDEN | | | | | None |
| Driver's License state | PPAIDEN | | | | | None |
| Driver's License nation | PPAIDEN | | | | | None |
| Veterans Information | PPAIDEN | SPAPERS | ROAPERS | FOAPERS | APAPERS | None |
| Legacy Code | PPAIDEN | SPAPERS | ROAPERS | FOAPERS | APAPERS | STVLGCY |
| Religion Code | PPAIDEN | SPAPERS | ROAPERS | FOAPERS | APAPERS | STVRELG |
| Confidentiality Indicator | PPAIDEN | SPAPERS | | | APAPERS | None |

| Item | HR Used on: | Student Used on: | Fin. Aid Used on: | Finance Used on: | Alumni Used on: | Rule/Val. Table |
|-----------------------------------|-------------|------------------|-------------------|------------------|-----------------|-----------------|
| Emergency Contact Information* | PPAIDEN | SPAEMRG | | | | None |
| Emergency Contact Relationship | PPAIDEN | SPAEMRG | | | | STVRELT |
| General-Information | PPAGENL | SOAPCOL | | | | None |
| General-Source | PPAGENL | SOAPCOL | | | APAADEG | STVSBGI |
| General-Degree Code | PPAGENL | SOAPCOL | | | APAADEG | STVDEGC |
| General-Majors | | SOAPCOL | | | APAADEG | STVMAJR |
| General-Minors | | SOAPCOL | | | APAADEG | STVMAJR |
| General-College | | | | | APAADEG | STVCOLL |
| General-Concentrations | | SOAPCOL | | | APAADEG | STVMAJR |
| General-Official Transcript | PPAIDEN | SOAPCOL | | | | None |
| Telephone Information | PPATELE | SPATELE | | FOATELE | APATELE | None |
| Telephone Type | PPATELE | SPATELE | | FOATELE | APATELE | STVTELE |
| Medical Information | PPAMEDI | SPAMEDI | | | | None |
| Medical - Code | PPAMEDI | SPAMEDI | | | | STVMEDI |
| Medical - Equipment | PPAMEDI | SPAMEDI | | | | STVMEDQ |
| Medical - Disability Type | | SPAMEDI | | | | STVDISA |
| Medical - Disability Service Type | | SPAMEDI | | | | STVSPSR |
| International - Information | PPAINTL | SPAINTL | | | | None |
| International - Visa Type | PPAINTL | SPAINTL | | | | STVVVYP |
| International - Entry Visa Type | PPAINTL | SPAINTL | | | | STVVVYP |
| International - Port of Entry | PPAINTL | SPAINTL | | | | STVPENT |
| International - Birth Nation | PPAINTL | SPAINTL | | | | STVNATN |
| International - Citizen Nation | PPAINTL | SPAINTL | | | | STVNATN |
| International - Language | PPAINTL | SPAINTL | | | | STVLANG |

| Item | HR Used on: | Student Used on: | Fin. Aid Used on: | Finance Used on: | Alumni Used on: | Rule/Val. Table |
|--|-------------|------------------|-------------------|------------------|-----------------|-----------------|
| International - Foreign Tax ID | PPAINTL | | | | | None |
| International - Sponsor | | SPAINTL | | | | STVSPON |
| International - Employment Type | | SPAINTL | | | | STVEMPT |
| International - Other Information | PPAINTL | SPAINTL | | | | None |
| International - I-20 Information | | SPAINTL | | | | None |
| Email* | GOAEMAL | GOAEMAL | | GOAEMAL | APAEMAL | GTVEMAL |
| Tenure Code [#] | PEAFAC | SIAFPER | | | | |
| Tenure Date [#] | PEAFAC | SIAFPER | | | | |
| Review Date [#] | PEAFAC | SIAFPER | | | | |
| AAUP Membership [#] | PEAFAC | SIAFPER | | | | |
| Years Experience [#] | PEAFAC | SIAFPER | | | | |
| Sabbatical Dates [#] | PEAFAC | SIAFPER | | | | |
| Academic Title [#] | PEAFAC | SIAFPER | | | | |
| Degree Institution | PPAGENL | SIAFDEG | | | | |
| Transcript Dates | PPAGENL | SIAFDEG | | | | |
| Degree (type) | PPAGENL | SIAFDEG | | | | |
| Year (degree) | PPAGENL | SIAFDEG | | | | |
| GPA | PPAGENL | SIAFDEG | | | | |
| Hours | PPAGENL | SIAFDEG | | | | |
| Major | PPAGENL | SIAFDEG | | | | |
| Minor | PPAGENL | SIAFDEG | | | | |
| Area of Concentration | PPAGENL | SIAFDEG | | | | |
| Faculty FTE ⁺ | PEAFACL | SIAASGN | | | | |
| Position ⁺ | PEAFACL | SIAASGN | | | | |
| Suffix ⁺ | PEAFACL | SIAASGN | | | | |
| | | | | | | |
| * Indicates Web for...ability to change data. | | | | | | |
| # If PEAFAC is used, then SIAPFER should be 'turned off'. | | | | | | |
| + Populated through the PEPFACL: Faculty Load Update Process | | | | | | |

26.5 Standard Change Record

- 02/22/2006 26.3 Table 3: Data Stewardship of Banner Tables
Updated to reflect current practice
- 26.4 Table 4: Shared Data Items
Changed reference to forms "RPAIDEN" and "ROAPERS" to "SPAIDEN" and "SPAPERS"
- 02/14/2007 26.2 Table 2: Shared Validation Tables
Added GTVLETR, GTVPARA and STVMATL
- 26.3 Table 3: Data Stewardship of Banner Tables
Changed GTVMAIL from Data Standards Committee to Advancement
Added STVMATL
- 01/09/2008 26.3 Table 3: Data Stewardship of Banner Tables
Changed contact information from Paul Webb to Esther Gunel
- 10/13/2010 26.2 Table 2: Shared Validation Tables
Added GTVADID, GTVRRAC, NTVACAT, NTVAGRP, NTVAPTY, STVETCT, STVWAIV
Changed GTVMAIL from X to XS in the Alumni & Development column
- 26.3 Table 3: Data Stewardship of Banner Tables
Added GTVADID, NTVACAT, NTVAGRP, NTVAPTY, STVWAIV
Changed GTVMAIL contact information from Cathy Cart to Annette Rurka
Changed STVCAMP contact information from Carol Norton to TBD
Changed STVETCT data steward from IRIM to IRIM/Admissions/HR and contact information from John Senko to Don Lund/Maryann Shichtman
Changed STVRATE contact information from Carol Norton to TBD
Changed STVRSTS contact information from Carol Norton to TBD
Changed STVVETC data steward from Veterans Office to Records & Registration and contact information from Greg Peoples to Sherry Winterson
Changed TSACONT contact information from Carol Norton to TBD
Changed TSADETC contact information from Carol Norton to TBD
Changed TSAEXPT contact information from Carol Norton to TBD
Changed TVVAUTH contact information from Carol Norton to TBD
Changed TTVBILL contact information from Carol Norton to TBD
Changed TTVDCAT contact information from Carol Norton to TBD
Changed TTVPAYT contact information from Carol Norton to TBD
Changed TTVSRCE contact information from Carol Norton to TBD
- 03/08/2011 26.3 Table 3: Data Stewardship of Banner Tables
Changed STVDIVS contact information from Craig Reidsma to Colleen Glaser

27 APPENDIX C – Procedures

27.1 Procedure for Fixing Multiple Person Records

When fixing person records in Banner due to multiple records for the same person, data must be moved from the person record to be deleted to the person record to be kept. The following procedures will be followed:

1. Go to GUIALTI (Alternate ID Search) or GUITINH (SSN History) & perform a search to identify if other multiple ids exist.
2. Go to GUASYST to see in what modules/areas data exists for the person. Note: the following is not specifically listed on GUASYST.
 - Admissions documents (SOAHSCH, SOAPCOL, SOAGPAT, SOATEST). Contact Ann Richards to verify whether admission documents exist.
 - International student data – If data exists on GOINTL, contact Esther Gunel in OIS.
 - Student AR data – if Registration is checked on GUASYST, contact Student Business Services to verify whether charges/payments exist.
 - Hold codes of “IT” and “PC” that appear on SOAHOLD. These codes indicate that there is an imaged academic record for a student. Contact Becky Kramer regarding any record with an ISIS (legacy student system) Alternate Id. These ID’s start with “000”.
3. If data is in one module/area, the responsible area should move all person data to one record and follow the procedures below under “Designate a Record to be Deleted”.
4. If data exists in more than one module/area, before any action is taken, contact the appropriate data steward(s) to determine the following: **(use a common subject line of “Merge ID” in e-mails to help expedite resolution of *multiple records*)**
 - Which person ID will be kept and which ID will be flagged as the record to be deleted.
 - Who will change the ID to an X-ID on the general person record (see step 3 under “Designate a Record to be Deleted”).

Then follow the procedures below under “Designate a Record to be Deleted”.

Notes:

- **Student AR transactions that exist with a User ID of “EMUCVT2” cannot be moved without creating duplicate transactions in Finance. Nothing should be done to these person records until this issue can be resolved.**
- **For procedures related to Finance/HR data that cannot be moved see procedures for “Designate a Record as a Permanent Duplicate”**

| MODULE/AREA | DATA STEWARD RESPONSIBLE FOR HANDLING MULTIPLE IDs | CONTACT INFO |
|-------------|--|--|
| Advancement | Annette Rurka | annette.rurka@emich.edu 481-2326 |
| Finance | Nannette White/Cindy Howie | Patty.Mclean@emich.edu 487-0022 Nannette.white@emich.edu 487-1200 |

| MODULE/AREA | DATA STEWARD RESPONSIBLE FOR HANDLING MULTIPLE IDs | CONTACT INFO |
|--|---|--|
| Financial Aid | Elizabeth Eicher | elizabeth.eicher@emich.edu 487-0204 |
| Human Resources (and Payroll) | Colleen Glaser - <i>Primary contact in HR – will notify other areas as necessary.</i> | colleen.glaser@emich.edu 487-5886 |
| Student – Admissions/Recruiting | *Ann Richards – Admissions | ann.richards@emich.edu 487-8956 |
| Student – GenStu/Registration/Faculty Assignments/AH/Transfer Data | *Becky Kramer – Records and Registration | becky.kramer@emich.edu 487-0094 |
| Student – International Student Data | Esther Gunel – Office of International Students | Esther.Gunel@emich.edu 487-3116 |
| Student AR | Tashina Kiley– Student Business Services | tkiley@emich.edu 487-3333 |

*Primary contacts for the Student Module. Primary contacts will notify other areas within Student if necessary.

Designate a Record to be Deleted

- **Each area is responsible for reviewing general person information to be sure all appropriate data exists or is moved to the good ID. It will be the responsibility of each area to move address/phone and alternate id data that they have ownership of.**
1. Move all data that needs to be moved for your module to the “good” record and delete this same data (as permitted by the system) from the record to be deleted.
 2. Offices using Web Xtender need to re-index their imaged documents.
 3. Using the appropriate *AIDEN and/or *APERS form(s) for your module (i.e. SPAIDEN, PPAIDEN, APAIDEN, etc.):
(**Remember** – Before changing or deleting any data, be sure the data exists under the “good” ID.)
 - Change the ID of the record to be deleted to “X” plus the last 8 digits of the ID number being kept.
Example:
Duplicate records exist under E000001234 and E00004321
ID E00004321 – ID to be kept
ID E00001234 – ID to be deleted
ID E00001234 - Change to X00004321

If a person has two or more duplicate records, change the second position of the ID to an alpha character beginning with letter A.
Example:
Duplicate records exist under E00004321, E00001234, E00004567 and E00006789
ID E00004321 – ID to be kept
ID E00001234, E00004567, E00006789 – ID’s to be deleted
ID E00001234 – Change to X00004321
ID E00004567 – Change to XA0004321
ID E00006789 – Change to XB0004321

- Name Type: add the Name Type of “DUP”
 - Name: leave as is
 - Alternate ID(s): Add the E-ID and any other alternate ID that belongs to your area to the good ID and delete them from the duplicate X-ID. Do Not delete any alternate ID’s that belong to other areas. Leave these on the record for the other area(s) to move.
 - Address: delete
 - DOB: delete
 - SSN: DO NOT delete if person is an employee. If person is not an employee, delete SSN.
 - Citizenship, Ethnic code, Marital Status: delete
4. On SPACMNT – on the record to be deleted, add the appropriate Comment Type and Originator code for your office which indicates that this record has been reviewed, all appropriate data has been moved and the record can be deleted.
- Note:** Do not overwrite any existing comment codes. If a comment code(s) already exists on the record, perform a Record-Insert (F6) to add a new comment code.

Office Comment Codes:

DAD – Admissions
 EAD – Xtender Adm Documents Moved
 DAS – Advancement Services
 DRR – Records & Registration
 DHR – HR/Payroll
 DFA – Financial Aid
 EFA – Xtender FinAid Documents Moved
 DSB – Student Business Services
 DFI – Finance
 DIS – Office of International Students

Originator Codes:

ADMS – Admissions
 ADVS – Advancement Services
 REC – Records & Registration
 HRIS – HR/Payroll
 FAID – Financial Aid
 STAC – Student Accounting
 OIS – Office of International Students
 FINC – Finance

Designate a Record as a Permanent Multiple

Used by Finance and HR to identify that a record is a permanent multiple because data cannot be merged or moved either programmatically or manually; **therefore, this record can never be deleted.**

1. Move all data that can be moved for your module to the “good” record and delete this same data (as permitted by the system) from the record that should no longer be used. **For employees, data that is required to make the person an employee cannot be deleted. Information must remain the same in order to process a W2 if necessary.
2. Using the appropriate *AIDEN form for your module (i.e. PPAIDEN, FOAIDEN):
 - Change the ID of the record that should no longer be used to “Z” plus the last 8 digits of the ID number being kept. Example:
 Multiple records exist under E000001234 and E00004321
 ID E00004321 – ID to be kept
 ID E00001234 – ID no longer used
 ID E00001234 - Change to Z00004321

- Name Type: add the Name Type of “DUP”.
- Name: leave as is.
- Alternate ID(s): Add the E-ID and any other alternate ID that belongs to your area to the good ID and delete them from the multiple Z-ID.
- Address: delete **If employee, MA/LO must remain in order to view employee record/process W2 if necessary.
- DOB: delete **If employee, must remain in order to view employee record/process W2 if necessary.
- SSN: delete **If employee, must remain in order to view employee record/process W2 if necessary.
- Citizenship, Ethnic code, Marital Status: delete **If employee, all must remain in order to view employee record/process W2 if necessary.

Vendor Records Created as a Person Record – Designate as a Duplicate:

Used by Finance to identify that a vendor record, created by mistake as a person record with an EID, is a permanent duplicate because data cannot be merged or moved, therefore, the record can never be deleted.

Note: *Current employees & current students who are receiving payment related to their employee or student status will have a Vendor record created under their EID. Any service provided by a current employee or student not related to their employment or student status will be entered as a Non-Person Vendor record with a Smart ID.

*if such an employee or student exists in Banner with more than one EID, follow the established procedures for “Fixing Multiple Person Records”.

If a vendor has been created in Banner as a Person with an EID and they need to be re-created as a Non-Person Vendor Record, the following steps will be followed:

1. Check GUASYST – does data exist in other areas?
 - Yes: record should remain as an EID.
 - No: go to step 2.
2. Check FOAIDEN Alternate ID Tab – does an ISIS alternate ID exist? (ID starting with 000 – this is a former student whose data was not converted to Banner)
 - Yes: contact Becky Kramer in Records.
 - Records will create a new Person Record with the ISIS Alternate ID.
 - Purchasing: go to step C.
 - No: go to step 3
3. Record is Vendor only:
 - Create the new Non-Person (Corporate) Vendor record.
 - Change the EID of the Person Record to a Z number with the following format:
 - Z00 + Smart ID. This ties the record back to the new Non-Person record.
 - Add the Name Type of “DUP”
 - Remove the alternate EID.

Note: the person’s SSN number will exist on both the Person Record and the Non-Person record. It was determined that should not cause problems for tape loads because you can specify for Common Matching to check Person Records only.

27.2 Standard Change Record