

EASTERN MICHIGAN UNIVERSITY™

DATA STANDARDS MANUAL

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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 3.3.2. 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 3.3.2. 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. The check must be issued under the EIN of the Estate or, if a letter is received by a lawyer indicating that there is not going to be an "estate" due to everything going to the spouse then the SSN of the surviving beneficiary is used. A Smart ID must be created for the Estate or the Beneficiary but not in the name of the deceased.

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, DISTINGUISHING AN ACCOUNTS RECEIVABLE VENDOR FROM AN ACCOUNTS PAYABLE VENDOR OR ISSUING REFUNDS TO NON-STUDENTS

1. 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

2. 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

3. 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 any of 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. A leading "8" is to be added to non-student accounts receivable vendors, only the BI address type should be used.

General Motors (GENMOT) would be (8GENMOT)

13. All SMART IDs will be created in compliance with paragraphs 1 through 12 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. 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 3.3.2
08/31/2015	3.2.2 Standards for Non-Person ID Format 2 paragraph was revised
09/02/2015	3.3.2 Creating a "SMART" Non-Person ID Beginning paragraph was revised Added new paragraph 12 Changed old paragraph 12 to paragraph 13 and updated first sentence to include new paragraph 12

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 60 characters
 Person Middle Name – maximum length 60 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 lowercase 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

Prefix: Sr
First: Mary Francis
Last: Smith
Preferred: Sr Mary Francis

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	
AVND	Active Corporate Vendor	

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 upon receiving notification from the office of the Provost (academic) and the office of the CFO (staff). 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	

Code	Description	Explanation
MAID	Maiden	
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.
PUID	PageUp ID	The PageUp (PU) implementation requires the Applicant Id (used in PU system) to come from PU and be stored at EMU so it can be connected to the New Hire EID.
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)	

TVND	Terminated Corporate Vendor	
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 Boone 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
06/08/2011	4.2.13 Name Type and Description Added AVND Code Added TVND Code
08/27/2013	4.1 General Changed the first name maximum characters from 15 to 60 Changed the middle name maximum characters from 15 to 60

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 Evergreen Building 1379 West Pine P.O. Box 2351 Denver, Colorado 87003	Dr. John Franklin Smith Evergreen Building P.O. Box 2351 1379 W Pine Denver, Colorado 87003	Dr John Franklin Smith Evergreen Bldg 1379 W Pine PO Box 2351 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:

<https://ribbs.usps.gov/index.cfm?>

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

<http://www.canadapost.ca/cpo/mc/personal/guides/default.jsf>

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 U.S. 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/cpotools/apps/fpc/personal/findByCity?execution=e1s1>

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 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 An EMU employee's primary physical location (office/department) on campus. Used by many campus departments for various reasons. Entered for newly hired employees by the employee's supervisor in Employee Self Service, Staff Human Resources or Academic Human Resources. Change in CA address maintained by IT/Communications.</p> <p>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 Room Number Building Name Ypsilanti, MI 48197</p>
CL	Collections	<p>Collections Address This address type is used by the University Collections Department (within Student Business Services).</p>
DM	Diploma	<p>Diploma Mailing Address 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 This address type is used for invoicing of Third Party Billing entities (within Student Business Services).</p>
EM	My.Emich	<p>My.Emich Email 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 Used by the Grants Accounting Office in the Finance Division.</p>

<u>Code</u>	<u>Description</u>	<u>Explanation</u>
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>
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 for International Students & Scholars 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>

<u>Code</u>	<u>Description</u>	<u>Explanation</u>
RH	Residence	Residence Hall Address This is a student on-campus housing address created, maintained and deleted by the Housing Office.
SE	Seasonal	Seasonal Mailing Address 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.
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	IT/Communications, Employee's Supervisor in Employee Self Service, Staff Human Resources, Academic Human Resources
CL	Collections Address	Student Business Services
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

ADDRESS TYPE	DESCRIPTION	OWNER
IS	International Student Permanent Mailing Address	-Recruits/applicants – Admissions -Student – Office for International Students & Scholars
LO	Local Mailing Address (Off-campus)	-International Recruits/applicants – Admissions -International Students – Office for International Students & Scholars -U.S. Students – Records & Registration and Student Business Services (Eagle Card Services)
MA	Permanent Mailing Address	-Faculty/Staff – appropriate Human Resources office upon hire and then employee self maintains in Employee Self Service -Recruits/applicants – Admissions -Students – Records & Registration, Office for International Students & Scholars -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
CODE	DESCRIPTION
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
COLL	SBS - Collections
DNC	Do Not Contact per Student
DSRV	Web - Data Standards Review
FA	Financial Aid
GMAT	GMAT Tape
GRE	GRE Tape
HONE	SBS – Higher One
HR	Human Resources
ISIR	Financial Aid - ISIR Tape
MTTC	MTTC Tape
NCRU	NCCRUA Tape
OIS	Office for International Students & Scholars
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 - NCCRUUA
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
08/10/2011	5.2.17 Address Types Added CL, Collections 5.2.18 Office(s) Responsible for Creation and Changes of Each Address Type Added CL, Collections Address 5.3.2 Address Sources Added COLL, SBS – Collections Added HONE, SBS – Higher One
12/10/2013	5.2.8 Sources for Additional Information Updated hyperlink to the U.S. Postal Service National Customer Support Center Updated hyperlink to the Canadian Postal Service 5.2.12.2 Canada Updated hyperlink to look up Canadian postal codes 5.2.17 Address Types Changed definition for CA, Campus Address for EMU Employees 5.2.18 Office(s) Responsible for Creation and Changes of Each Address Type Changed owner for CA, Campus Address for EMU Employees from Human Resources (all) to Staff Human Resources, Academic Human Resources and IT/Communications
08/31/2015	5.2.17 Address Types Corrected name of Office for International Students & Scholars 5.3.2 Address Sources Corrected name of Office for International Students & Scholars

*03/08/2011: 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
CL	Collections Address Telephone Type	Telephone number associated with a collections address
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	IT/Communications, Employee's Supervisor in Employee Self Service, Staff Human Resources, Academic Human Resources
CL	Collections Address Telephone Type	Student Business Services
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 for International Students & Scholars
IS	International Student Address	Admissions, Office for International Students & Scholars
ADDRESS TELEPHONE TYPE	DESCRIPTION	OWNER
LO	Local Address Telephone Type	-Records & Registration, domestic students -Admissions, international recruits & applicants -Office for International Students & Scholars, International students
MA	Mailing Address Telephone Type	-Faculty/Staff – appropriate Human Resources office upon hire and then employee self maintains in Employee Self Service - 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
- 08/10/2011 6.2.1.2 Address Telephone Types
Added CL, Collections Address Telephone Type
- 6.2.2 Office(s) Responsible for Creation and Changes for Each Address Telephone Type
Added CL, Collections Address Telephone Type
- 08/31/2015 6.2.2 Office(s) Responsible for Creation and Changes for Each Address Telephone Type
Corrected name of Office for International Students & Scholars

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 26JUN-00. If you omit the century, zeros are entered for the century. In this example, if you enter 26-JUN00, 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, 103 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, 103 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
03/18/2015	10.3 Guidelines Updated location for Academic Human Resources

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 Staff Human Resources or Academic 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 data 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

2. 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.

3. 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. When updating deceased information in Banner:

- Decease 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".**

14.2. Standards

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

14.3. Guidelines

Notification of a Student Death (includes former/current students and current students who are also employees):

General Procedures for all University Departments:

- If you receive notification of a student death from any source other than the Student Well-Being Office, notify the Student Well-Being Office immediately so the Student Death Notice can be completed and distributed.
- Communicate information with departmental staff as appropriate.

See Appendix 28 for:

- Student Death Notice form
- University Procedures upon Notification of a Student Death – includes a list of University offices who receive notification.

Questions regarding the notification of student death procedures can be directed to the Assistant Vice President of Student Well-Being Office at 734-487-1107.

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
03/08/2012	14.1 General Update contact information in table
	14.3 Guidelines Updated contact information in table
03/14/2012	14.3 Guidelines Updated contact information in table
08/27/2013	14.1 General Updated contact information in table
	14.3 Guidelines Updated contact information in table
10/15/2013	14.1 General Updated contact information in table
	14.3 Guidelines Updated contact information in table
12/10/2013	14.1 General Updated contact information for Human Resources (Staff) Updated contact information for Human Resources (Faculty) Added Human Resources (Benefits) Updated office and contact information for Student and Advancement
	14.3 Guidelines Updated office and contact information for Advancement, Human Resources, Academic Human Resources, Finance, Student and Security Added Human Resources (Benefits), Housing and Student AR
05/14/2014	14.1 General

Updated contact information for Human Resources from Katie Aeschliman to TBD

14.3 Guidelines

Updated contact information for Human Resources from Katie Aeschliman to TBD

Updated contact information for Financial Aid from Cynthia VanPelt to Jennifer Tremewan

Updated contact information for Housing from Marney Buss to TBD

10/22/2014

14.1 General

Updated contact information for Human Resources from TBD to Helene LaGrow

14.3 Guidelines

Updated contact information for Human Resources from TBD to Helene LaGrow

03/18/2015

14.1 General

Added new information and deleted table

14.2 Standards

Deleted the last one-sentence paragraph

14.3 Guidelines

Added new information and deleted table

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
Sr	Sister

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 for International Students & Scholars	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. International Information Maintained in GOINTL

GOINTL is primarily used to store data on non-immigrant students attending EMU. However, it may also contain information on students who are permanent residents and/or citizens if they have an international background.

17.2.2.1. Visa Tab – Visa Type

- a. **Visa Type Students** – Visa Type will be originally inputted by **international admissions** upon application processing; leave blank for U.S. citizens, and enter visa or immigration category for all others, including permanent residents. Data will be maintained by the Office for International Students and Scholars.

- b. **Visa Type Scholars – Human Resources** will reach out to OISS if hiring a J scholar from another school. Data will be maintained by the Office for International Students and Scholars.

17.2.2.2. Visa Tab – Visa Number, National of Issue, Date Issued, Start Date and End Date

Note: For F and J non-immigrant students, these fields are used by Payroll and do NOT represent visa information; OISS may use as indicated for other visa types.

- a. F and J student employees – **OISS** inputs the data; updates maintained by payroll.
- b. F and J graduate assistants – **Human Resources** will input the data; updates maintained by payroll.
- c. **Visa Number, Nation of Issue and Date Issued** will be left blank for Canadian students because they are not required to have a visa to study in the U.S.
- d. **Date Issued** will be the date the visa was issued.
- e. **Start Date** will be the first date the student entered the country on this visa; note this is NOT the issue date of the visa.
- f. **End Date** is the last date of employment eligibility as specified on the I-20, DS-2019, EAD card or visa.

17.2.2.3. Visa Tab – Issuing Authority, Port of Entry, Number of Entries and Date Requested

These fields are left blank.

Leave Blank

Visa
Passport
Certification of Eligibility
Nationality

Visa Information

Visa Type: Entered by Admissions

Visa Number: Leave blank for Canadians only

Nation of Issue: Blank for Canadians only

Issuing Authority: [Redacted]

Port of Entry: [Redacted]

Sequence Number: [Redacted]

Entry

Number of Entries: [Redacted]

Date Requested: [Redacted]

Date Issued: Visa issuance date. Blank for Canadians only.

Start Date: Date first entered the U.S. on F or J visa. See passport stamp or I-94.

End Date: Last date of employment. See I-20 end date/DS-2019 end date, visa end date (for non Fs and Js), EAD card end date.



17.2.2.4. Passport Tab – Number, Nation of Issue, Expiration Date

- a. These fields are used for **F and J students only**. OISS will input and maintain information.

17.2.2.5. Passport Tab – Admission and Departure Status, Expiration Date, Alien Registration Number

- a. **Status and Expiration Date** – OISS will maintain for all F and J students.
 - i. **Status** is the visa type.
 - ii. **Expiration Date** is the date their “status” ends.
 - 1. **F students** – equals program end date + 60 days (grace period)
 - 2. **J students** – equals program end date + 30 days (grace period)
- b. **Alien Registration Number** – OISS will enter SEVIS number for all F and J students.
- c. **Duration of Stay** – OISS will check for all F students.

Visa
 Passport
 Certification of Eligibility
 Nationality

Passport Data entered & maintained by OISS

Number:

Nation of Issue: India

Expiration Date:

Admission and Departure

Status: OIS will enter F or J. Other offices can leave blank.

Expiration Date: OIS will enter I-20 end date plus 60 days or DS-2019 end date plus 30 days. Other offices can leave blank.

Alien Registration Number: SEVIS number for F and J students only.

Duration of Stay

17.2.2.6. Certification of Eligibility Tab

This tab is currently not used.

17.2.2.7. Nationality Tab – Nation of Birth, Nation of Citizen, Native Language, Sponsor and Employment Type

- Students: Nation of Birth and Nation of Citizen** should be entered for ALL students, regardless of citizenship status; original input by **international admissions** upon application processing.
- Students: Native Language** is entered by OISS, if known.
- Students: Sponsor and Employment Type** are saved for use by OISS; not currently maintained.

Nationality

Nation of Birth: India **Input by Admissions upon application**

Nation of Citizen: India

Native Language:

Sponsor:

Employment Type:

Foreign Tax ID:

NOTE:

This update (Section 17.2.2) is per agreement at a meeting on 9/9/2014 and subsequent email clarifications. Attendees to this meeting included Amy Barker, Susan Sohn, Sam Buttigieg, Julia Wells, Stephanie Robinson, Colleen Glaser, Tracy Pytlak, Rhonda Linderman, Mike Weise, Candice White, and Therese O'Neil-Darling. Sue Sohn presented this to the Data Standards Committee on 12/10/2014.

17.2.3. Visa Status

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

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	17.1 General Updated EMU Foundation entry
01/31/2006	17.1 General Corrected name of Office for International Students
08/31/2015	17.1 General Corrected name of Office for International Students & Scholars
	17.2.3 Visa Status

Corrected name of Office for International Students & Scholars

- 08/10/2016 17.2.2 Country of Citizenship
Removed from manual at the request of Esther Gunel and Sue Sohn, OISS
- 08/10/2016 17.2.2 International Information Maintained in GOAINTL
Added entire section to replace above section

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 or information can also be entered by an employee in Banner Employee Self Service. 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 Disabled Veteran	The date that the person was separated from active duty Special 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
10/12/2011	18.2.2 Veteran Category

Updated to reflect entering data through the Banner employee self-service

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 for International Students & Scholars
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_"
08/31/2015	24.2 Standards Corrected name of Office for International Students & Scholars

25. 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.

A list of current Data Standards Committee members and areas represented can be found on the IRIM website at https://irim.emich.edu/cmte_data_standards.php.

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:

25.2. Standard Change Record

03/06/2012	25 Appendix A – Data Standards Change Request Form Updated table to reflect current committee members
03/14/2012	25 Appendix A – Data Standards Change Request Form Updated table to reflect current committee members
06/25/2012	25 Appendix A – Data Standards Change Request Form Updated table to reflect current committee members
08/27/2013	25 Appendix A – Data Standards Change Request Form Updated table to reflect current committee members
09/12/2013	25 Appendix A – Data Standards Change Request Form Updated table to reflect current committee members
10/14/2013	25 Appendix A – Data Standards Change Request Form Updated table to reflect current committee members
10/15/2013	25 Appendix A – Data Standards Change Request Form Updated table to reflect current committee members
11/20/2013	25 Appendix A – Data Standards Change Request Form Updated table to reflect current committee members
12/10/2013	25 Appendix A – Data Standards Change Request Form Updated table to reflect correct banner module represented by a current committee member
03/12/2014	25 Appendix A – Data Standards Change Request Form Updated contact information for Graduate School from Marion Laskowski to Vacant
10/07/2014	25 Appendix A – Data Standards Change Request Form Updated contact information for Student – Admissions & Recruiting from Maryann

Shichtman to Jeanine Novak

- 10/22/2014 25 Appendix A – Data Standards Change Request Form
Updated Banner Module(s) Represented for Colleen Glaser from Academic Human Resources, HRIS to University Human Resources
Updated table to remove Sam Buttigieg, Employment/Compensation, as a current member
- 05/14/2015 25 Appendix A – Data Standards Change Request Form
Updated contact information for Advancement from Garima Sharma to Annette Rurka
- 08/31/2015 25 Appendix A – Data Standards Change Request Form
Corrected name of Office for International Students & Scholars
- 08/10/2016 25 Appendix A – Data Standards Change Request Form
Updated contact information for Office for International Students & Scholars from Susan Sohn to Jenny DuChene
Updated contact information for Retention Services, IRIM from Anne Fox to Archit Agarwal

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	XS	XS	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
GXR BANK	Bank Code Rule Form				XS	X
GXDIRD	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			
STVTESC	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	Functional Area
FTVACCI	Account Index Code	Accounting	Finance
FTVACCT	Account Code	Accounting	Finance
FTVACTV	Activity Code	Accounting	Finance
FTVCOAS	Chart of Account	Accounting	Finance
FTVFUND	Fund Code	Accounting	Finance
FTVLOCN	Location Code	Accounting	Finance
FTVOBUD	Budget ID and Phase	Accounting	Finance
FTVORGN	Organization Code	Accounting	Finance
FTVPROG	Program Code	Accounting	Finance
GTVADID	Add-In Code	Admissions	Student - Admissions & Recruiting
GTVEMAL	Email Type	Records & Registration	Student - Records & Registration, etc.
GTVEXPN	Expenses	EMU Foundation	Advancement Services
GTVMAIL	Mail Type	EMU Foundation	Advancement Services
GTVNTYP	Name Type	EMU Foundation	Advancement Services
GTVRRAC	Race Code Validation	Admissions	Student - Admissions & Recruiting
GTVSCOD	EDI/ISO Standard Code	Office for International Students & Scholars	Office for International Students & Scholars
GTVSUBJ	Subject Index	Advancement	Advancement Services
GTVZIPC	ZIP/Postal Code	Records & Registration	Student - Records & Registration, etc.
GXR BANK	Bank Code Rule Form	Accounting	Finance
GXVDIRD	Bank Routing Number	Accounting	Finance
NTVACAT	Approval Category Code	Payroll	Payroll
NTVAGRP	Electronic Approval Groups	Payroll	Payroll
NTVAPTY	Approval Type Code	Payroll	Payroll
SOATBRK	Student Term Break Form	Records & Registration	Student - Records & Registration, etc.
STVACCG	Activity Category	EMU Foundation	Advancement Services
STVACTC	Activity Code	EMU Foundation	Advancement Services
STVACTP	Activity Type	EMU Foundation	Advancement Services

STVACYR	Academic Year Code	Records & Registration	Student - Records & Registration, etc.
STVADMT	Admission Type	Admissions	Student - Admissions & Recruiting
STVAPDC	Admissions App Decision Codes	Admissions	Student - Admissions & Recruiting
STVAPST	Admission App Status	Admissions	Student - Admissions & Recruiting
STVASCD	Room Assignment Status	Housing	
STVASRC	Address Source	Admissions	Student - Admissions & Recruiting
STVASTD	Academic Standing	Records & Registration	Student - Records & Registration, etc.
STVATYP	Address Type Code	Records & Registration	Student - Records & Registration, etc.

Table	Description	Data Steward	Contact Information
STVBLDG	Building	Records & Registration / Housing	
STVCAMP	Campus Code	Student Business Services	Student Business Services
STVCIPC	CIPC Code	Records & Registration	Student - Records & Registration, etc.
STVCITZ	Citizen Type Code	Admissions	Student - Admissions & Recruiting
STVCLAS	Class Code	Records & Registration	Student - Records & Registration, etc.
STVCNTY	County Code	Records & Registration	Student - Records & Registration, etc.
STVCOLL	College Code	Records & Registration	Student - Records & Registration, etc.
STVCOMT	Committee/Service Type	Records & Registration	Student - Records & Registration, etc.
STVCTYP	Contact Type	Admissions	Student - Admissions & Recruiting
STVDAYS	Days of the Week	Records & Registration	Student - Records & Registration, etc.
STVDEGC	Degree Code	Records & Registration	Student - Records & Registration, etc.
STVDEGS	Degree Status	Records & Registration	Student - Records & Registration, etc.
STVDEPT	Department Code	Records & Registration	Student - Records & Registration, etc.
STVDIVS	Division	Human Resources	University Human Resources
STVDLEV	Degree Level	Records & Registration	Student - Records & Registration, etc.
STVDPLM	Diploma type	Admissions	Student - Admissions & Recruiting
STVEMPT	Employment Type	Office for International Students & Scholars	Office for International Students & Scholars

STVESTS	Enrollment Status	Records & Registration	Student - Records & Registration, etc.
STVETCT	IPEDS Ethnic Code	IRIM/Admissions/HR	Institutional Research/Student - Admissions & Recruiting/University Human Resources
STVETHN	Ethnic Code	Admissions	Student - Admissions & Recruiting
STVETYP	Event Type	EMU Foundation	Advancement Services
STVFCNT	Faculty Contract Code	Academic HR	University Human Resources
STVGEOD	Geographic Region Division	Admissions	Student - Admissions & Recruiting
STVGEOR	Geographic Region Code	Admissions	Student - Admissions & Recruiting
STVGMOD	Grading Mode Code	Records & Registration	Student - Records & Registration, etc.
STVHAPS	Housing Application Status	Housing	
STVHLDD	Hold Type	Records & Registration	Student - Records & Registration, etc.
STVHOND	Departmental Honors Code	Records & Registration	Student - Records & Registration, etc.
STVHONR	Institutional Honors Code	Records & Registration	Student - Records & Registration, etc.
STVINIT	Initials Code	Admissions	Student - Admissions & Recruiting
STVLANG	Language	Office for International Students & Scholars	Office for International Students & Scholars
STVLEAD	Leadership	EMU Foundation	Advancement Services
STVLEVL	Level Code	Records & Registration	Student - Records & Registration, etc.
STVLGCY	Legacy	Admissions	Student - Admissions & Recruiting
STVMAJR	Major/Minor/Conc. Code	Records & Registration	Student - Records & Registration, etc.
STVMDEQ	Medical Equipment Code	Not used	
STVMEDI	Medical Code	Not used	
STVMRCD	Meal Rate	Housing	
STVMRTL	Marital Status Code	Human Resources	University Human Resources
STVMSCD	Meal Assignment Status	Housing	
STVNATN	Nation Code	Office for International Students & Scholars	Office for International Students & Scholars
STVNIIST	Faculty Non-Instructional Type Code	Academic HR	
STVORIG	Originator Code	Records & Registration	Student - Records & Registration, etc.
STVPENT	Port of Entry Code	Office for International Students & Scholars	Office for International Students & Scholars
STVRATE	Student Fee Assessment Code	Student Business Services	Student Business Services

Table	Description	Data Steward	Contact Information
STVRDEF	Building/Room Attribute	Records & Registration / Housing	
STVRELG	Religion Code	Not used	
STVRELT	Relation Code	Human Resources	University Human Resources
STVRMST	Room Status	Records & Registration / Housing	
STVRRCD	Room Rate	Housing	
STVRSTS	Course Registration Status	Records & Registration	Student - Records & Registration, etc.
STVSBGI	Source/Background Institution	Admissions	Student - Admissions & Recruiting
STVSITE	Site	Records & Registration	Student - Records & Registration, etc.
STVSPON	International Student Sponsor	Admissions	Student - Admissions & Recruiting
STVSTAT	State/Province Code	Records & Registration	Student - Records & Registration, etc.
STVSTST	Student Status	Records & Registration	Student - Records & Registration, etc.
STVTADM	Test Score Administration Type	Admissions	Student - Admissions & Recruiting
STVTELE	Telephone Type	Records & Registration	Student - Records & Registration, etc.
STVTEPR	Test Purpose	Admissions	Student - Admissions & Recruiting
STVTERM	Term Type	Records & Registration	Student - Records & Registration, etc.
STVTESC	Test Code	Admissions	Student - Admissions & Recruiting
STVTSRC	Admission Test Score Source	Admissions	Student - Admissions & Recruiting
STVVETC	Veteran Type	Records & Registration	Student - Records & Registration, etc.
STVVVYP	VISA Type	Office for International Students & Scholars	Office for International Students & Scholars
STVWAIV	Application Fee Waiver Code	Admissions	Student - Admissions & Recruiting
STVWDRL	Student Withdrawal Status Codes	Records & Registration	Student - Records & Registration, etc.
TSACONT	Contract Authorization Form	Student Business Services	Student Business Services
TSADETC	Detail Code Control Form	Student Business Services	Student Business Services
TSAEXPT	Exemption Authorization Form	Student Business Services	Student Business Services
TVVAUTH	Authorization Validation Form	Student Business Services	Student Business Services

TTVBILL	Billing Code	Student Business Services	Student Business Services
TTVDCAT	Detail Category	Student Business Services	Student Business Services
TTVPAYT	Payment Type	Student Business Services	Student Business Services
TTVSRCE	Charge/Payment Detail Src	Student Business Services	Student Business Services
GURAPAY	Accounting Feed AP Table	Accounting	Finance
GURFEED	Finance Transaction Input Table	Accounting	Finance

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
GeneralSource	PPAGENL	SOAPCOL			APAADEG	STVSBGI
General-Degree Code	PPAGENL	SOAPCOL			APAADEG	STVDEGC
GeneralMajors		SOAPCOL			APAADEG	STVMAJR
GeneralMinors		SOAPCOL			APAADEG	STVMAJR
GeneralCollege					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 PEAFACL 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, GTV PARA and STVMATL
- 26.3 Table 3: Data Stewardship of Banner Tables
Changed GTVMAIL from Data Standards Committee to Advancement
Added STVMATL
- 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

12/10/2013 Added STVFCNT and STVNIST

08/31/2015 26.3 Table 3: Data Stewardship of Banner Tables
Corrected name of Office for International Students & Scholars

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 Admissions to verify whether admission documents exist.
 - International student data – If data exists on GOAINTL, contact OISS.
 - 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 Records and Registration 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	OFFICE RESPONSIBLE FOR HANDLING MULTIPLE IDs
Advancement	Advancement Services
Finance	Finance
Financial Aid	Financial Aid
Human Resources (and Payroll)	University Human Resources, Payroll
Student – Admissions/Recruiting	Student - Admissions & Recruiting
Student – GenStu/Registration/Faculty Assignments/AH/Transfer Data	Student - Records & Registration
Student – International Student Data	Office for International Students and Scholars
Student Accounts Receivable	Student Business Services

*Committee Member for the office responsible can be found at https://irim.emich.edu/cmte_data_standards.php.

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 for International Students & Scholars

Originator Codes:

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

- 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 and 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:

- Check GUASYST – Does data exist in other areas?
 - Yes: record should remain as an EID.
 - No: go to step 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
- 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

03/14/2012	27.1 Procedure for Fixing Multiple Person Records Updated contact information in table
08/27/2013	27.1 Procedure for Fixing Multiple Person Records Updated contact information in table
01/26/2015	27.1 Procedure for Fixing Multiple Person Records Updated international student data contact information from Esther Gunel to Susan Sohn (both in item #2 and table)
08/31/2015	27.1 Procedure for Fixing Multiple Person Records Corrected name of Office for International Students & Scholars and OISS acronym
09/02/2015	27.1 Procedure for Fixing Multiple Person Records Name and Phone Number Change for Student AR from Tashina Killey, 487-3333 to Kerri Cebina, 487-0247
08/10/2016	27.1 Procedure for Fixing Multiple Person Records Updated international student data contact information from Susan Sohn to Jenny DuChene (both in item #2 and table)

28. APPENDIX D – Student Death Notice Form and Procedures

28.1. Student Death Notice Form

Please see next page for the fillable Student Death Notice form.

Eastern Michigan University
STUDENT DEATH NOTICE

RESPONSE LEVEL

Information sharing Crisis Management

STUDENT INFORMATION

Name: Click here to enter text. Student #: Click here to enter text. Most recent semester enrolled: Click here to enter text. Local address: Click here to enter text. Graduate: Yes No

Home address: Click here to enter text.

Date of Graduation: Click here to enter text.

Date of birth: Click here to enter text.

Degree Awarded/Area of Study: Click here to enter text.

Date of death: Click here to enter text.

CIRCUMSTANCES OF DEATH

Cause of death: Click here to enter text.

Brief explanation: Click here to enter text.

Location On campus Off campus

Name of person reporting death: Click here to enter text.

Relationship/position: Click here to enter text.

NEXT OF KIN CONTACT INFORMATION

Name of parents or next of kin: Click here to enter text.

Address: Click here to enter text.

Phone numbers: Click here to enter text.

Contact w/family needed? Yes No Staff responsible: Initials and date: _____

UNIVERSITY

AFFILIATIONS

Greek Athletic Team Housing other: Click here to enter text.

Contact with roommates/affiliations needed? Yes No Staff responsible: Click here to enter text.

OFFICES TO BE CONTACTED BY THE AVP-DASA (in-person, by phone or email):

- Office of the President Initials and date: _____
- Legal Affairs Initials and date: _____
- Housing Initials and date: _____
- Ombud's Office Initials and date: _____
- Provost's Office Initials and date: _____
- Public Safety Initials and date: _____
- Student Affairs Initials and date: _____
- University Communications Initials and date: _____
- Counseling & Psych Services Initials and date: _____

OFFICES TO RECEIVE A COPY OF THIS NOTICE (check as appropriate)

- Academic Advising
- Admissions
- Alumni Relations & Advancement
- Athletics
- Campus Life
- Career Services
- Disability Resource Center

- Diversity & Community Involvement
- Facilities Operation
- Financial Aid
- Government Relations

- Graduate School
- Human Resources
- International Students & Scholars
- Information Technology
- Military & Veterans Resource Center

- Records and Registration
- Risk Management
- Student Business Services
- Student Conduct & Community Standards
- University Health Services

28.2. University Procedures upon Notification of a Student Death

General Procedures for all University Departments:

- ***If you receive notification of a student death from any source other than the Student Well-Being Office, notify the Student Well-Being Office immediately so the Student Death Notice can be completed and distributed.***
- **Communicate information with departmental staff as appropriate.**
- **Note deceased status in pertinent office record and remove file from active status.**

Academic Advising

- If student has an active file, the file will be removed and closed.

Admissions

- Update Banner by end-dating the addresses of the student. This helps to avoid additional mailings from going to the student's home or other addresses.
- Withdraw any active admission application(s) and communication plan(s).
- Set the deceased flag in Banner on records for prospective/recruited students.

Alumni Relations/Development

- If the deceased student is a graduate of EMU or is related to a graduate of EMU, send a note to the family of the deceased.
- If deceased student is an EMU graduate, check to make sure student is taken off any mailing list.

Athletics

- If the deceased student was an EMU athlete, the Athletic Director will notify the coach for the sport involved and the Head Athletic Trainer.
- Notify the other coaches and athletic department staff.
- Coordinate a team meeting and request additional counseling resources as needed.
- Communication with the family should be coordinated with the Provost's Office.

Campus Life

- Notify Campus Life staff as appropriate.
- If deceased student has a known affiliation with a student organization(s), notify the organization's leadership.
- If the student was employed or volunteered in the department, notify appropriate supervisor.

Career Services (Student Employment)

- If deceased student was a current student employee, contact Payroll Office to remove student from Web Time Entry System.
- Notify the EMU employer(s) or external employer if student was on a co-op program.

- If student has a paycheck that has not yet been processed or distributed, check with Student Business Services to determine appropriate method of distributing paycheck.

Counseling and Psychological Services

- Determine if student was a client and manage closing of student record as appropriate.
- Provide campus support options for grieving members of the University community. This may include outreach efforts to individuals such as friends, roommates and students living in the same residence hall as the student; faculty members and students taking classes in which the student is enrolled; coaches and team members if the student was a student-athlete; and advisors and members of student organizations in which student was involved; or student employees if student worked on campus.

Disability Resource Center

- If the deceased student was registered with the Disability Resource Center, communicate information to departmental staff as appropriate.
- Note deceased status in office database and in student's file.
- Remove file from active status filing and place with inactive file records.

Financial Aid

- Change the student's financial aid status to "NOSHOW" to stop any correspondence from being sent from the office.
- Leave all aid as it is, to prevent the family from having to pay back returned aid.
- Close out financial aid files and inform financial institutions as necessary.

Government Relations

- Notify specific community, state and federal agencies, organizations or offices as appropriate.

Graduate School

- If the student was a graduate assistant, note the end to the position in Banner.
- Contact Payroll to remove student from payroll and send the last pay to the family.
- Contact Financial Aid and Student Business Services regarding tuition award.
- Send note/card to family.

Housing and Residence Life

- Convene staff quickly and assess type of communication and support needed to the residential community. □
Assist family to get belongings (offer to pack student's possessions but allow family to pack if preferred).
- Withhold billing, close out the student's account, cancel housing contract and application for housing for future term (if applicable), and update records accordingly.
- Remove any Housing charges, stop meal plan and close account. Determine if full or pro-rated refund for room and meal plan is appropriate and inform Student Business Services of any refunds.
- Make arrangements for therapy/service animal care.
- Forward mail to family, screening out for university mail. □ Collect keys from family and/or change room lock.

Human Resources

- Check files to see if student was ever an applicant for a university position and if so, removes the file.
- Check files to determine if student ever filed a report with the Diversity and Affirmative Action Office, and if so, determines appropriate management of that report.

Information Technology

- Close the student's account and respond to any legal questions.
- Remove access from student's Eagle Card.

International Students

Upon the death of an international student or scholar holding a non-immigrant visa, OISS would initiate the following actions:

- Gather all clippings, obituaries, mortuary programs.

- Make certain pictures of the deceased are taken.
- Coordinate with Assistant Vice President of Student Well-Being office to determine who will notify family (if necessary). Secure native speakers to assist as needed. □ Notify the appropriate embassy.
- Coordinate with student's family concerning the disposition of the body. □ Notify the Department of Homeland Security in SEVIS.
- Determine the type of communication and support needed for the international student community.

In the event of a death of an international student holding some other visa type, OISS would act in a supportive role to the family and international community.

Legal Affairs

- Coordinate with EMU's Risk Management Office regarding appropriate notice to EMU's self-insurance facility.

Military and Veterans Resource Center

- If student was enrolled through the office, close file and notify proper authorities.

Ombuds Office

- Note deceased status in office database if student has record with Ombuds Office.

Physical Plant

- Provide support services as requested by Provost's Office.

President's Office

- Communicate with the Board of Regents and Secretary to the Board.
- Communicate with Senior Leadership Team as appropriate.
- Send a letter of condolence to the family.
- Coordinate with University Communications regarding media communication as appropriate.

Provost's Office

- Coordinate the appropriate notifications within the Academic and Student Affairs Division. □ Notify all college deans. Insure the deans notify Academic Department of student's major or program of study.
- Determine if a posthumous degree should be awarded and take appropriate action. □ Send note/card to family as appropriate.

Public Safety

In the event of a student death occurring on campus, DPS would initiate the following actions:

- Respond to the scene.
- Investigate the death and coordinate with the Medical Examiner.
- Notify the University President.
- Provide information to the Assistant Vice President of Student Well-Being for Student Death Notice and for coordinating notification of next of kin.
- Offer support services to other departments as needed or requested.
- If the deceased was involved in a current case, make appropriate notations in the file.

In the event of an off-campus student death, DPS would initiate the following actions:

- Notify the President and the Provost.
- Complete a Departmental Information report.
- If the deceased was involved in a current case, make appropriate notations in the file.

Records and Registration

- Check to see that student's status in Banner has been changed to "deceased." □ Withdraw the student from all classes effective the deceased date on Banner.

- Inform Provost if student is near graduation to determine if a posthumous degree would be appropriate.

Risk Management

- Assess and respond to liability concerns if death was work-related or connected to a university activity or event, e.g., accidental or non-natural deaths
- Develop information for university records in the event a claim is made against the University or one of its employees due to the student's death.
- Submit an Incident "Report Only" to our liability insurance third party administrator of any deaths that occur on campus or due to the University's involvement.

Student Affairs Office

- Notify staff of Student Center and Diversity and Community Involvement Department as appropriate.
- Coordinate appropriate university response in consultation with Assistant Vice President of Student Well-Being, i.e., crisis management or general follow-up.
- Communicate response plan with Provost's Office.

Student Business Services

- Review status of student's account and determine how to manage any charges. If account is in collection, work with Collections to eliminate the debt.
- If account is current, determine steps necessary to close account based on type of financial aid (if any). If student owes, eliminate the debt.
- If there is a credit on the account, arrange to send a check with a condolence note.

Student Conduct and Community Standards

- If deceased student has file, remove file. If file is active, close case. Enter deceased status in office database.

Student Well-Being Office Verify the death.

- Determine the response level and initiate appropriate university response.
- Provide direct communication to offices as listed on Student Death Notice.
- Provide copy of Student Death Notice to selected offices as determined by circumstances of situation and status of student.
- Collaborate with University Communications in the preparation of any university announcement.
- Determine who has or will contact the family/next of kin.
- Coordinate appropriate condolences to the family, such as letter, card, flowers, representative to funeral, etc.

University Communications

- Notify University Communications staff as appropriate.
- Develop information to prepare for media calls and coordinate with media as needed. □ If the response level is crisis management, follow the Crisis Management Plan.
- Determine, in consultation with Provost's Office designee, whether notification to campus community is appropriate, and follow recommendations.

University Health Services

- Communicate with UHS administrative staff.
- Check Medical and Health Education records, note deceased status, and place in inactive records files.
- Check for outstanding medical charges and EMU student insurance status and follow up appropriately as needed.
- Provide support services as requested.

NOTE: Each unit should have a written set of procedures that are followed upon the notification of a student death. An up-to-date copy of each unit's procedures should be on file in the Assistant Vice President of Student Well-Being Office located at 315 Snow Health Center.

10/2014

NOTE: In the Student Death Notice form, the International Students & Scholars office name was corrected. 08/31/2015

NOTE: In Section 28.2 University Procedures upon Notification of a Student Death, the OISS acronym was corrected.

08/31/2015

28.3. Standard Change Record

03/18/2015 28.1 Student Death Notice Form
Added initial information

28.2 University Procedures upon Notification of a Student Death
Added initial information

29. APPENDIX E – School of Record Agreement

EMU has entered into a School of Record Agreement beginning with the summer 2019 semester necessitating several coding additions in Banner.

1. STVLEVL - "SR" - School of Record
2. STVCOLL - "SR" - School of Record
3. SMAPRLE - "NDEG-AA-SR" - School of Record
4. STVSUBJ - Multiples but will include "SOR" in the Description
5. STVGMOD - "R" - School of Record
6. STVMAJR - "SOR" - School of Record (attached to the "NDEG-AA-SR" program code and "UGST" department on SOACURR)
7. SHAGRDE - grades will be entered for the SR level

Only name, gender, date of birth and email address will be entered on SPAIDEN. All students will have a "00" Good academic standing. They will be admitted with the unknown admission type (00), unclassified student type (U) and undeclared residence type (0). Their curriculum will be the NDEG-AA-SR program and SOR major. They should not be counted in any admission reports. The Pre-Banner option will be used to add the students' courses, grades and credit hours. A comment will also be added to identify the university where the student studied and the EMU equivalency for the courses they took.

30. APPENDIX F – Change Requests

30.1. November 22, 2021: Data Standards Committee Meeting

● Meeting Logistics

Item	BOC/Data Standards
Date	Monday, November 22nd, 2021
Time	10:30 am
Location	Join Zoom Meeting https://emich.zoom.us/j/86992953404?pwd=UDVmOG9Ha3Z3OEhhQ2VEQlppTmxGZz09 Meeting ID: 869 9295 3404 Passcode: 771517 One tap mobile +12532158782,,86992953404# US (Tacoma) +13017158592,,86992953404# US (Washington D.C)
Attendees	Heather, Ann, Sara, Alankrita, Annette, Carol, Jenny D., Jennifer T., John, Kerri

● **Agenda**

#	Topic	Requestor
1	No BOC Items	
	Data Standards Meeting	
1	<p>Visa Entry in GOINTL</p> <ul style="list-style-type: none"> - Jenny & Kerri have been working with IT to address some issues with international health insurance charges being added for students who aren't required to carry health insurance. - Only students on F & J visas are required to have insurance - Most Banner jobs run based on GOINTL records - For students who have been previously admitted as an F-1 but were not issued an I-20, or students who were issued an I-20 but never came to EMU, or students who were previously on F-1 status but had a change or adjustment to status and are studying at EMU under the new status; - If students are studying at EMU under a different status than they were previously admitted with , Jenny will either a) update the record to reflect the new visa status or b) delete the F or J record entry - No issues/concerns from the rest of the group regarding this proposed change. 	Jenny DuChene
2	<p>ECA</p> <ul style="list-style-type: none"> ● We have been asked if we can lift the required Yes/No question for US citizenship for ECA students. These are high school students taking college courses in EMU. ECA is prohibited to ask citizenship questions of high school students, however we require answers to this question on their EMU application. Admissions doesn't need this information as we don't issue I-20s and there are no scholarships for this population. I'm wondering if it is OK to not collect the citizenship information for this population and leave the field empty. When students apply later as FTIAC, this question will be required on our regular app. ● Comment from Jenny: If they are a student with I-20 from a HS, then they need to report how often they're on campus vs in HS. The OISS office isn't required to track them, but needs to be aware, if the student is here on campus more than in HS, that can be a violation. ● No issues/concerns from the rest of the group regarding this proposed change. 	Sarah Sun
3	Other	All

30.2. August 6, 2022: New Code Approvals Needed for Projects P3687 and P3699

30.2.1. First Note to Committee

Subject:New Code Approvals Needed for Projects P3687 and P3699

Date:Fri, 26 Aug 2022 15:51:36 -0400

From:Donald Lund <dlund4@emich.edu>

To:data-standards-committee <data-standards-committee@list2.emich.edu>

Sapna Maheshwari (smaheshw) is seeking approval from the Data Standards Committee to create an alternate ID to support the implementation of a New Hire / Onboarding application called PageUP (Project Number P3687).

Here is the original note from Sapna:

Background:

The PageUp (PU) implementation requires the Applicant Id (used in PU system) to come from PU and be stored at EMU so it can be connected to the New Hire EId.

Solution:

The team reviewed possible options and narrowed down the form PPAIDEN / second tab - Alternate Identification - Name Type, DB field SPRIDEN_NTYP_CODE as the best location to store this data, with value being PUID (PageUp ID)

What Is needed:

This needs to go via the Data Standards committee for approval. Please advise if there is any other information the team needs to provide to move this forward.

Sapna is also seeking approval from the DSC for a new PPACERT code to support Project P3699 - ECA Student Employment.

In fact, there is another project - P3699 - ECA Student Employment, for which a new PPACERT code - ECAS is requested. I believe that will have to get DSC approval as well (Please let me know if otherwise.).

Since our Monday 8/29 meeting has been cancelled and our next scheduled meeting is 9/12, and because Sapna wishes to move these projects forward, I am asking you to approve or object to these proposals by responding to this email by COB on Wednesday, 8/31.

A non-response will be assumed to be an implied approval.

Thank you for your attention to this matter.

--

Regards,

Don Lund

Sr. Data Systems Analyst

Institutional Research and Information Management

Eastern Michigan University

30.2.2. Second Note to Committee

Subject:Re: New Code Approvals Needed for Projects P3687 and P3699

Date:Thu, 1 Sep 2022 10:59:42 -0400

From:Donald Lund <dlund4@emich.edu>

To:data-standards-committee <data-standards-committee@list2.emich.edu>

So far we have receive approvals from Student, Financial Aid, and SBS.

One concern was expressed by Advancement.

There were no objections.

I am going to send committee approval to Sapna for these projects and include the body of the concerns expressed by Advancement.

Regards,
Don Lund
Sr. Data Systems Analyst
Institutional Research and Information Management
Eastern Michigan University

30.2.3. Committee Approval for Projects P3687 and P3699

Subject:Committee Approval for Projects P3687 and P3699

Date:Thu, 1 Sep 2022 14:49:46 -0400

From:Donald Lund <dlund4@emich.edu>

To:Sapna Maheshwari <smaheshw@emich.edu>

CC:data-standards-committee <data-standards-committee@list2.emich.edu>

Sapna,

The Data Standards Committee has conditionally approved your plans for Projects P3687 and P3699.

The conditions of our approval are as follows:

re: P3687

I don't have any issues with the project as long as it's understood that this is a shared field and that the EMU Foundation also uses this field to capture EMU Foundation staff status for LAZ Parking and EMU IT because EMU Foundation employees do not have a PEAEMPL record. Please don't overwrite any Foundation data in this field.

My original message to the committee regarding your proposal is repeated below for the record:

Sapna Maheshwari (smaheshw) is seeking approval from the Data Standards Committee to create an alternate ID to support the implementation of a New Hire / Onboarding application called PageUP (Project Number P3687).

Here is the original note from Sapna:

Background:

The PageUp (PU) implementation requires the Applicant Id (used in PU system) to come from PU and be stored at EMU so it can be connected to the New Hire EId.

Solution:

The team reviewed possible options and narrowed down the form PPAIDEN / second tab - Alternate Identification - Name Type, DB field SPRIDEN_NTYP_CODE as the best location to store this data, with value being PUID (PageUp ID)

What Is needed:

This needs to go via the Data Standards committee for approval. Please advise if there is any other information the team needs to provide to move this forward.

Sapna is also seeking approval from the DSC for a new PPACERT code to support Project P3699 - ECA Student Employment.

In fact, there is another project - P3699 - ECA Student Employment, for which a new PPACERT code - ECAS is requested. I believe that will have to get DSC approval as well (Please let me know if otherwise.).

Since our Monday 8/29 meeting has been cancelled and our next scheduled meeting is 9/12, and because Sapna wishes to move these projects forward, I am asking you to approve or object to these proposals by responding to this email by COB on Wednesday, 8/31.

A non-response will be assumed to be an implied approval.

Thank you for your attention to this matter.

--

Regards,
Don Lund
Sr. Data Systems Analyst

30.3. June 19, 2023: Data Standards Committee Meeting

● **Meeting Logistics**

Item	BOC/Data Standards
Date	Monday, June 19, 2023
Time	10:30 am
Location	Join Zoom Meeting https://emich.zoom.us/j/86992953404?pwd=UDVmOG9Ha3Z3OEZhQ2VEQlppTmxGZz09 Meeting ID: 869 9295 3404 Passcode: 771517 One tap mobile +12532158782,,86992953404# US (Tacoma) +13017158592,,86992953404# US (Washington D.C)
Attendees	Lynnette, Lindsay, Jennifer T, Annette, Karen, Dawn, Kerri, Ryan, Kristen, Bill, Don, Ann

● **Agenda**

#	Topic	Requestor
1	Meeting cancelled for lack of agenda items.	
2		
3		
	Data Standards Meeting (starting at 10:30 due to no BOC agenda items this week)	
1	GTVDICD District Code Division Validation discussion (continued): HR will need access to be able to update this form, Foundation employees will not need access to this form any longer. The Data Standards Manual will be updated to reflect this change.	Lynnette
2	Adding a new Residency Code: Jim Carroll is planning to begin offering in-state tuition to international students enrolled in specific graduate programs. The residency code "I" will be added to indicate graduate in-state tuition eligibility on SAAADMS. *This motion was passed with no objections, but follow up is needed as no R&R representative was able to attend the meeting. Kerri will draft an update of this new code for the Data Standards Manual.	Kerri
3		

30.3.1. Residency Code Details

Code: I

Code Description: Non-Res Grad-In State Tuition

Forms: SAAADMS, SGASTDN

Tables: STVRES

Notes: A new code was needed because existing codes were causing assessment issues.

30.4. November 4, 2024: Data Standards Committee Meeting

The Committee approved the following items during the meeting on November 4, 2024.

Add the following values to Banner tables for axiom to tag Slate IDs

- 'SLID' to GTVADID
- 'SLAP' to STVORIG
- 'PR' to STVATYP