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1 Names

1.1 *General*

Names and addresses in Banner 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 or address is printed on correspondence, it looks contemporary and professional.

1.2 *Standards for Adding A New Record*

Enter the last, first and middle names exactly as the person has indicated. If given the full middle name, enter the full middle name. Do **NOT** change a full name to an initial. Always use normal upper- and lower-case letters for names. The objective is to print the name on mailings, correspondence, etc. just like the “customer” wants it to print. One exception, Human Resources enters the name as it appears on the Social Security card. **Caution:** the University is using the current name as the legal name in Banner. A person’s legal name appears on a court order, social security card, marriage license or passport.

1.2.1 **Case**

If the 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 (duBois, for example). For externally obtained data feeds, UTS has developed a system to convert names into this upper- and lower-case format based on general rules.

1.2.2 **Initials**

Use a period after initials, whether a first name initial or a middle name initial. See the following examples:

D. Gary Smith (First name = D.; Middle name = Gary)
Pamela A. Humphrey (Middle name = A.)
Leslie M. F. Donner (Middle name = M. F.)

Note: Do not use an initial for the first name unless the name appears as such on legal name documentation (see 1.2 and 1.2.8).

1.2.3 Spaces

Maintain spaces in last names (one space maximum). See the following examples:

Van Buren
Van der Vaart
Vander Vaart

1.2.4 Punctuation

Use hyphens, apostrophes, dashes or periods exactly as the person indicates in writing. 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, St Denis, StDenis, St-Denis
SaintDenis, Saint-Denis, Saint Denis

1.2.5 Prefixes and Suffixes

DO NOT enter prefixes and suffixes (such as Mr., Ms., Lt., or Rev. and Jr., IV, or Esq.) in the name fields of the current identification block on the Banner IDEN forms. *Enter prefixes and suffixes in the respectively named fields on the General Person forms.*

1.2.6 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 previous identification block.

1.2.7 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.

1.2.8 Preferred First Name

Offices may enter names in this field.

Example:

**William Knight (Preferred First Name: Bill) -- Bill would be entered in the Preferred First Name field.
D. Mark Wilson -- Enter Mark in the Preferred First Name field.**

1.2.9 Non Person Name

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 in the full legal name of a non-person entry, it should be included when entering the name in Banner (e.g., The Colorado College).

Example:

**ABC Trucking
Dept of Defense
University of Portland
J. F. Kennedy Co.
First National Bank**

1.2.10 Name Type and Description

The “current” name in Banner does not require a type to be identified. In other words, if there is only one name, it is current and the type can be left blank.

**MADN
PREV
SORT**

**Maiden Name
Previous Name
Organization Sort Name**

1.3 Procedures

1.3.1 Adding New Records

Person and non-person records are created the first time someone enters them in Banner. Multiple offices have the ability to create new entities in Banner. Individual units (e.g., Alumni, Admissions, Human Resources, Registrar) will develop procedures for adding Banner person records.

1.3.1.1 Creation of New Person or Non-person Record

Person and non-person records are created the first time someone enters them in Banner. The following offices have the ability to create a new student or general person or non-person record.

| Office | Type of Entity |
|-------------------------------|---|
| Admission Units | Prospective, Admitted Students |
| Office of the Registrar | Student |
| Special Programs & Interterms | Student |
| English Language Center | Prospective, Admitted Students, |
| Fisher Early Learning Center | Person |
| Ricks Center | Person |
| D.U. High School | Person |
| Student Financial Services | Third Party, Financial Aid Prospect, Financial Aid Lender |
| Accounts Payable | Vendor (Non-Person) |
| Human Resources | Applicant, Employee |
| Campus Safety | Person (parking permits) |
| Institutional Advancement | Constituent (donor), person or non-person |

1.3.1.2 Searching for Multiple Records

A complete search must be done before entering a new person or non-person in Banner. There should only be **one** record for each entity. Any entities that are in Banner more than once must go through the “multiple PIDM” process.

How to do a complete search:

- Search on any portion of the name or ID that is known. Remember that names in Banner are case sensitive.
- Use the “soundex” feature if you are not sure of the spelling
- Use a wildcard (% or_)
- This precaution may take a few minutes to perform, whereas fixing a multiple PIDM may take several weeks to complete.

1.3.1.3 Multiple PIDMS Management

Quarterly, prior to rolling classes into academic history, the Office of the Registrar (UTS)? will initiate an audit of general person and general student records, to search for duplicate records. This report will identify the modules in which the possible duplicate records exist (Location Management, Recruiting, Admissions, Academic History, Billing, Payroll, etc). Based on the report, the concerned offices will meet with the purpose of resolving the problem, by following the necessary procedure to combine the duplicates into one record for the student or person.

1.3.2 Data Integrity Across Multiple Modules

A common institutional database offers the potential for better service and convenience to our constituents and greater accuracy across the University. Simultaneously, each administrative unit must be cognizant of data integrity requirements of other University units in its practices. Name change practices are a key example where specific policies must be followed depending on the type of record.

Whenever a constituent requests a name change it is necessary to determine (using GUASYST) in which modules the record occurs. If the individual is a current employee, only Human Resources/Payroll may make the change; if the individual has a student record, the Office of the Registrar, Institutional Advancement or any academic unit may make the change following prescribed procedures/policies.

1.3.3 Name Change Policies

The following chart summarizes policies and procedures for making name changes for person and non-person entities in Banner. Informed professional judgment must be used to determine what constitutes a name correction rather than a name change (i.e. data entry spelling error). In a name correction, the current name should be “typed-over”. No previous or alternative name record is kept and no documentation is required.

| Person/Non-Person | Procedures |
|---|---|
| Employee (faculty or staff) – whether or not any other record type exists | Human Resources/Payroll will make the change. Use Name Change Form and require one of the following: <ul style="list-style-type: none"> • Social Security Card • Marriage Certificate/License • Court Order Document • Driver’s License • Passport See Name Change Form for procedures. |
| Student (current or former) – excluding faculty or staff (<i>who should follow “Employee” guidelines above</i>) | Registrar, Institutional Advancement or any academic unit may make change. Use Name Change Form and require one of the following: <ul style="list-style-type: none"> • Social Security Card • Marriage Certificate/License • Court Order Document • Driver’s License • Passport See Name Change Form for procedures. |
| Accounts Payable vendors | Accounts Payable or Purchasing staff will make change if no other record exists for vendor. |
| Admission recruit or applicant, not a current student or employee | Change upon request of individual. |
| Alumni constituent only (no student record type exists) | Institutional Advancement will make change upon request of constituent. |
| Financial Aid | Financial Aid record only. Names updated by data loads. |
| Third Party | Change upon request of individual or company. |

1.3.4 Name Change Report

An audit report of name changes will be run (daily/weekly?) by Human Resources, Payroll, Student Financial Services and/or Office of the Registrar to reconcile name change activity and documentation. If a name change has been made that requires additional documentation, it is the concerned unit’s responsibility to follow up with the unit implementing the change and/or the person whose name has been changed, as appropriate.



1.3.5 Name Change Form
See Figure 1.0

Figure 1.0

2197 S. University Blvd.
Denver, CO 80208
(303) 871-2284



Name Change Form (Please Print)

DUID: _____

SSN: _____

Current Name: _____

New Name: _____

Date of Birth: _____

Day Telephone: _____ E-mail: _____

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 the University of Denver.

Signature: _____

Check all that apply:

Student Faculty Staff Alum

Students and Alumni, please answer the following:

Dates of Attendance at DU: _____

Have you graduated from DU? Yes No

If yes, give most recent degree: _____

If no, which degree program/major were you last enrolled in at DU? _____

Previous Names (not listed above): _____

Are you currently a Perkins Loan Borrower or a Financial Aid recipient through Student Financial Services?: Yes No

FOR OFFICE USE ONLY

| | | |
|--|-------|-------|
| Received by: Name: | Dept: | Date: |
| Changed by: Name: | Dept: | Date: |
| Required Documents: | | |
| <u>Faculty/Staff</u> | | |
| Human Resources/Payroll requires a Social Security Card. Forward to Human Resources – Columbine Hall West #13 | | |
| <u>Students/Alumni with Financial Aid or Perkins Loans</u> | | |
| Student Financial Services requires a Social Security Card, Court Order, Marriage License, Passport. Forward to Office of Student Financial Services – University Hall Rm 223 | | |
| <u>All Students/Alumni</u> | | |
| For last name changes due to Marriage only – the Registrar’s Office requires the signed <i>Statement of Responsibility</i> . For first or middle name changes – the Registrar’s Office requires a Social Security Card, Court Order, or Passport. Forward to Office of the Registrar – University Hall Rm B133, Attn: Name Changes | | |

2 Addresses

2.1 *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 Admission) 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. These standards must balance three considerations:

**Banner system requirements;
Accepted standards for formal communications;
U.S. Postal Service guidelines.**

All addresses must meet US Postal Service addressing requirements. The guidelines expressed herein are designed to convey the minimum standard requirements to be used throughout the University. Thus, while giving preference to formal addressing guidelines, this document contains a degree of flexibility in areas such as punctuation and abbreviation.

For example, an admission prospect or a vendor might be stored as received (for example):

**William P Hicks
1238 S Humboldt St Unit 234
Denver CO 80218-2455**

We may wish to change the address for an admitted applicant or a donor to read as follows:

**William P. Hicks
1238 South Humboldt Street, Unit 234
Denver, CO 80218-2455**

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.

2.2 Standards

2.2.1 Street Standards

All information is typed in upper/lower case format (i.e., not all caps or all lower). Street names should be spelled out in their entirety whenever possible.

2.2.2 Punctuation

Punctuation (hyphens, periods, slashes, commas and apostrophes) should be used if space permits. With the exception of the hyphen in the zip plus 4 configuration, punctuation in the delivery address block may be omitted if necessary and according to the established hierarchy for modifications.

2.2.3 Symbols

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

- The ampersand "&" should only be used in place of "and" if it is used on individual or business letterhead.
- The percent symbol "%" should never be used.
- The designation for "in care of" should be abbreviated as "c/o" when necessary and should be entered on the first street address line.

2.2.4 Secondary Address Unit Designators

If the address is multi-unit apartment or building, place the room, suite, or apartment number to the right of the street address.

If the primary address uses all available characters, 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.

Example:

**Suite 202
1356 South Executive Drive**

The pound sign "#" is acceptable as a unit designator if the unit type is unknown. Key a space in between the pound sign and the unit designator numbers or letters. Do **NOT** use "No." as a unit designator. Never use the pound sign as the first character in an address.

Example:

1624 West Donner Street, # 101

Recommended abbreviations for common unit designators are:

Apartment Apt
Building Bldg
Room Rm
Floor Fl
Suite Ste
Department Dept

Refer to the Postal Addressing Standards publication for other unit designator abbreviations.

Examples:

102 Main Street, Apt. 101
1356 Executive Drive, Ste. 202
1600 Central Place, Bldg. 14
55 Sylvan Boulevard, Rm. 18

2.2.5 Compass Directions

If appropriate, compass directional words may be abbreviated at the beginning and/or end of the street name. Because 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 North Main Street, S.W.
160 North South Street
1624 N. South Boulevard
156 N. 23rd Street

Compass directional words should be abbreviated as follows:

| | | | |
|-------|----|-----------|------|
| East | E. | Northeast | N.E. |
| West | W. | Northwest | N.W. |
| North | N. | Southeast | S.E. |
| South | S. | Southwest | S.W. |



2.2.6 Street Address and PO Box

Banner address formats allow three lines of street address information. If both the physical street address and PO Box number need to be maintained, enter the street address as home address and the PO Box as mailing address.

| Information Given | Home/Business Address | Mailing Address |
|--|---|--|
| Dr. John Franklin Smith Evergreen Building 1379 West Pine PO Box 2351 Denver, CO 87003 | Dr. John Franklin Smith Evergreen Building 1379 West Pine Denver, CO 87003 | Dr. John Franklin Smith 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. An example of a three-line address is:

**c/o Duncan McCleod
Suite 910
1494 Highlander Boulevard**

2.2.7 Abbreviations for Street Designators

Refer to the U.S. Postal Service Address Standards publication for abbreviations of designators not listed below.

- 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.**

2.2.8 Sources for Additional Information

There are style manuals that deal with formal addressing style. There are several U.S. Postal Service publications dealing with addressing. 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 U.S. Postal Service National Customer Support Center has a very useful web site that provides extensive address and zip code information:

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

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

http://www.canadapost.ca/CPC2/menu_01.html

2.2.9 City

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 15 characters, use abbreviation standards described herein or in the US Postal Service *Postal Addressing Standards* (System generated from zip code entry).

2.2.10 State and Province

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. See *Figure 2.0 for state and province codes*.

Canadian Provinces are entered in the State/Province field, **NOT** in the City field. Canadian Provinces include Alberta, British Columbia, Manitoba, New Brunswick, Newfoundland, Northwest Territories, Nova Scotia, Ontario, Prince Edward Island, Quebec, Saskatchewan, and Yukon have their own code for entry into the State Field. Note: Canadian addresses must include the city in the City Field and the Province in the State Field. (System generated from zip code entry)

2.2.11 County

Enter the county code from the list of values in the validation form (System generated from zip code entry).

2.2.12 Zip or Postal Code

Zip or postal codes **MUST** be entered for all U.S. and Canadian addresses.

2.2.12.1 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

2.2.12.2 Canadian

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

Examples:

T2T 2Y5

R2L 1N4

2.2.13 Country

A country code is required for all non-U.S. addresses. Banner maintains a list of all the current code options available.

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

2.2.14 Military Address

2.2.14.1 Overseas Locations

- Enter the APO or FPO code into the CITY field.
- Enter the military 'state' code (AA, AE, or AP) into the State field.
- AA for units 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 Dennis Becker
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**

2.2.14.2 Domestic Locations

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

Example:

**Col. Margaret Henry
Lowery Air Force Base
8205 East Sixth Avenue, #405
Denver, CO 80234**

2.2.15 International Addresses

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.

2.2.16 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
Building 14-100
14200 East 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**

Figure 2.0

State and Province Codes



Armed Forces

AA The Americas
AE Europe
AP The Pacific

United States

AL Alabama
AK Alaska
AZ Arizona
AR Arkansas
CA California
CO Colorado
CT Connecticut
DE Delaware
DC District of Columbia
FL Florida
GA Georgia
HI Hawaii
ID Idaho
IL Illinois
IN Indiana
IA Iowa
KS Kansas
KY Kentucky
LA Louisiana
ME Maine
MD Maryland
MA Massachusetts
MI Michigan
MN Minnesota
MS Mississippi
MO Missouri
MT Montana
NE Nebraska
NV Nevada
NH New Hampshire
NJ New Jersey
NM New Mexico
NY New York
NC North Carolina
ND North Dakota
OH Ohio
OK Oklahoma
OR Oregon

PA Pennsylvania
RI Rhode Island
SC South Carolina
SD South Dakota
TN Tennessee
TX Texas
UT Utah
VT Vermont
VI Virgin Islands
VA Virginia
WA Washington
WV West Virginia
WI Wisconsin
WY Wyoming

US Territories

AS American Samoa
FM Federated States of Micronesia
GU Guam
MH Marshall Islands
MP Northern Mariana Island
PW Palau
PR Puerto Rico

Canadian Provinces

AB Alberta
BC British Columbia
MB Manitoba
NB New Brunswick
NF Newfoundland
NT Northwest Territory
NS Nova Scotia
ON Ontario
PE Prince Edward Island
QC Quebec
SK Saskatchewan
YT Yukon Territory

2.2.17 Address Types

It is our desire to maintain a standardized list of address types based on their purposes, rather than separate addresses for each University department. This will reduce redundant data entry. Thus, an individual may appear in accounts payable, be an alum, employee and enrolled as a current student in the Law School and only have a single address. The Institutional Advancement Office 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: GR, TE, SE, and then MA. Admission might typically search for a mailing address in this order: TE, SE, and then MA. **Identical addresses should not be keyed in different address types.**

The following table describes address types defined for the University of Denver Banner system.

| Code | Description | Explanation |
|------|-------------|---|
| MA | Mailing | This is the default address for the Banner system and the University of Denver. The address at which a person is currently receiving mail. For most applications, Mailing address will be used ahead of home address. For some applications, (admission prospects) this will be the only address record. This address will be updated from various sources. |
| HO | Home | Home address is used to distinguish a permanent address for students who are from out of the area. It also identifies a preferred contact address if it is different from the mailing address. |
| LO | Local | Local address is current residence when different from mailing or home address and includes Residence Hall addresses. This address is not a P.O. Box. |

| | | |
|-----------|--------------------------|---|
| PA and P2 | Parent(s) | Parent address(es) of students or other constituents where such records are significant. PA should be used first. P2 only when parents have separate addresses. |
| BI | Billing | Used when billing address is different from primary Mailing Address. Used for students or other entities the University bills. |
| BU | Business | The principal address for non-person entities or employer's address. |
| GR | Grades | Used only for mailing grades and only when student requests grades are mailed to a different address from primary mailing address. |
| MG | Matching Gift | Used by Institutional Advancement to record address for Matching Gift Entity. |
| TE | Temporary | Used to temporarily override Mailing Address. Should be entered with termination date. |
| SE | Seasonal | Used to temporarily override Mailing Address on a regular basis, e.g. June through August. Used primarily by Institutional Advancement. Should be entered with valid dates. |
| PO | Purchase Order Address | Used by Purchasing Department |
| AP | Accounts Payable Address | Used by Accounts Payable Department. |
| XX | TGR Feed | Used internally by Banner. |

2.2.18 Address Source

The following table describes address source codes defined for the University of Denver Banner system.

| Address Source Code | Description |
|----------------------------|--|
| NCOA | National Change of Address |
| VEND | Vendor purchased change |
| THRD | Third party reported change |
| INFR | Information received from relative |
| PHON | Phonathon received change |
| POST | Post Office change – returned letter |
| WEB | Change received via the WEB (This is a “system assigned” value – do not enter code) |
| SELF | Self reported change by individual |

2.3 Procedures

2.3.1 Adding a New Address

To add a new address, follow these steps:

- Change the ‘TO’ date on the existing address of same type to the current date
- Click in inactive
- Save changes
- Select ‘Insert Record’
- Enter address information
- Save changes

2.3.2 Guidelines

| Person Type | Guidelines |
|--|---|
| Student | Any Administrative office may add a new address. The previous address should not be modified. |
| Faculty/Staff | Any Administrative office may add a new address. The previous address should not be modified. |
| Alumni | Any Administrative office may add a new address. The previous address should not be modified. |
| Non-Person (Vendors) | |
| Accounts Payable or Purchasing Office vendor | Any administrative office should put new address in the document text of the Requisition. |

3 Telephone Numbers

3.1 *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. International phone numbers are entered in a special 'international' field in these forms of the Banner System: APATELE, FOATELE, PPATELE, RPATELE and SPATELE.

3.2 *Standards*

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

3.2.1 **Telephone Types**

A telephone type distinguishes each telephone number entered in the Banner system. The University uses the following codes:

| Code | Description | Explanation |
|-------------|--------------------|---|
| FAX | Fax Telephone | Used for vendor, student, staff or alumni facsimile. |
| HOME | Home Telephone | Used for student, staff, or alumni home telephone number. |
| BUS | Business Telephone | Used for vendor, student, staff, or alumni business telephone number. |
| CELL | Cellular Telephone | Used for vendor, student, staff, or alumni cellular phone number. |

3.2.2 **Telephone Numbers**

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

3.2.2.1 **Area Code**

The three-digit area code must be entered for all phone numbers including the local (303) area.

3.2.2.2 Phone Number

Enter the seven-digit number without inserting a hyphen.

Example:

**2837300
5741386**

3.2.2.3 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

3.2.3 International Phone Numbers

International phone numbers consist of three parts.

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

3.2.3.1 Country Code

The country code consists of one to four-digits and is required.

3.2.3.2 City Code

The city code consists of one to three-digits, but not all countries utilize city codes. The city code is often reported with a zero (0) in front of it. Do **NOT** enter the zero.

3.2.3.3 Phone Number

The phone number consists of four to seven digits and is required.

3.2.4 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 + the 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 into 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 |
| Montserrat | 664 |
| Northern Marianas Islands (Saipan, Rota and Tinian) | 670 |
| 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 |

3.3 Procedures

3.3.1 Adding New Records

Telephone numbers may be tied or linked to a specific address. The 'Address Type' and 'Seq No' fields are used to link the telephone number to a specific address. It is possible to have more than one telephone number for a single address.

3.3.1.1 Telephone Numbers

All regional and local telephone numbers, including on-campus phone numbers, need to be entered using the ten-digit format. Enter all three parts in the appropriate field, using no parentheses or hyphens. Do **NOT** enter the standard “1” code for long distance dialing.

3.3.1.2 International Numbers

There is a 16 character limit in the international phone number field. Enter all three parts in the appropriate international phone number field, using no parentheses or hyphens. Do **NOT** enter the “011” standard code for international dialing.

Example:

8137599311 would be entered for a telephone number in Japan consisting of 81 for the country code, 03 for the city code and 7599311 for the phone number.

4 E-Mail

4.1 *General*

Students, faculty and staff at the University of Denver are eligible to receive internet access, e-mail services, and UNIX system access. Use of these privileges requires establishing an account with University Technology Services. Registered students automatically receive Individual Computer Accounts, which include a University specific e-mail address.

4.2 *Standards*

All e-mail addresses entered should be evaluated for case sensitivity and spelling. Some e-mail systems are case sensitive before the @.

4.2.1 E-Mail Address Types

| Code | Description | Explanation |
|------|-------------------------|---|
| BUSN | Business E-mail Address | Used for vendor, student, faculty, staff, or alumni e-mail address. |
| DU | DU E-mail Address | Used for student faculty, staff, or alumni e-mail address. |
| PERS | Personal E-mail Address | Used for student, faculty, staff or alumni e-mail address. |

One e-mail address can be marked as the preferred e-mail address. If e-mail is stored, then the preferred indicator must be checked to indicate the preferred e-mail address. If the preferred indicator is not checked then the e-mail address may be omitted from selection.

4.3 *Procedures*

4.3.1 Adding an E-Mail Address

Be aware that e-mail addresses follow a standard format. E-mail addresses consist of a login name followed by the @ sign, followed by the domain name. A domain name contains between two and four elements separated by periods. For example, support@du.edu is the address where DU computer support questions can be sent. All incoming students are provided with a university email address.

Examples

An e-mail address for a University student:

twilliam@du.edu

An e-mail address for an Alumni:

rcampbel@denver.quest.com

An e-mail address for a vendor:

custserv01@corpexpress.com

5 Calendar Dates

5.1 General

Dates are entered on a variety of screens for various purposes.

5.2 Standards

5.2.1 Calendar Dates

The University prints dates in the format **dd-mmm-yyyy**. Dates may be entered in any format. The system will re-display the date in the **dd-mmm-yyyy** format.

Examples:

January 17, 1999 becomes 17-JAN-1999

4/17/99 becomes 17-APR-1999

060899 becomes 08-JUN-1999

6 Gender

6.1 *General*

The U.S. Department of Education requires that the University reports gender information.

6.2 *Standards*

6.2.1 **Gender**

| Code | Description | Explanation |
|-------------|--------------------|---|
| M | Male | Description: A male person, man or boy |
| F | Female | Description: A female person, woman or girl |
| U | Unknown | Description: The gender information is not available or if the gender cannot be determined by the name, i.e., Chris, Pat, Terry, etc. |

NOTE: All employees and students **MUST** be classified as a male or female.

7 Social Security Number

7.1 General

7.2 Standards

7.2.1 Social Security Number

Enter the entire (nine) 9-digit number, omitting dashes and spaces between numbers (e.g. 555491133).

- The SSN is required for students and employees.
- The SSN is not required for constituents who are friends of the University.

7.3 Procedures

7.3.1 Changes to Social Security Number

A person making a social security number change request must present a new social security number card. Good professional judgment should be used when making error corrections to Social Security Numbers. Make the change and send a copy to the Office of Student Financial Services, Ext. 4900.

8 Date of Birth

8.1 General

8.2 Standards

8.2.1 Date of Birth

- The Date of Birth is required for employees and students.
- The Date of Birth is optional for alumni and friends.

8.2.2 Changes to Date of Birth

An employee or student making a date of birth change request must present a birth certificate. If person is a student, make the date of birth change and send a copy of birth certificate to the Office of Student Financial Services, Ext. 4900.

8.3 Procedures

When a birth date is required, but none is available, Human Resources uses the holder code date 07-JUL-1864 to allow processing an employee. Periodically, records containing this date will be identified and corrected. When the year of birth is known, but not the specific month or day, Institutional Advancement will use the code 01-JAN-60, where "60" is the year of birth and will vary with the constituent, to associate a birth date with constituent's record.

9 Marital Code

9.1 *General*

9.2 *Standards*

9.2.1 **Marital Code**

This information may be collected for students, employees and constituents of the University.

| Code | Description | Explanation |
|-------------|--------------------|--------------------------------------|
| M | Married | Legally married |
| S | Single | Not married |
| LP | Life Partner | Not married but considered a partner |
| U | Unknown | Marital Status is unknown |

9.3 *Procedures*

10 Ethnicity Code

10.1 *General*

10.2 *Standards*

10.2.1 **Ethnicity**

This field **MUST** be entered for students and employees who are U.S. citizens or U.S. permanent residents. This field **MUST NOT** be entered for international students or employees (non-U.S. citizens residing in the U.S. on a visa). This field is optional for constituents who are friends of the University.

| Ethnicity Code | Description |
|-----------------------|--------------------------------|
| 1 | White |
| 2 | Black |
| 3 | Hispanic |
| 4 | Asian/Pacific Islander |
| 5 | Alaskan Native/American Indian |
| 6 | Race/Ethnicity Unknown |

10.3 *Procedures*

For international students or employees (non-U.S. citizens residing in the U.S. on a visa), leave this field **BLANK**.

11 Deceased Information

11.1 *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.

11.2 *Standards*

11.3 *Procedures*

For employees and retirees of the University, **ONLY** the Human Resource department will enter and change this information based on prevailing policies.

For constituents (who are not students or employees), Institutional Advancement will enter and change this information based on prevailing policies.

For student changes, forward copy of documentation to Student Financial Services, Ext. 4900.

12 Prefix Codes – Names

12.1 General

12.2 Standards

12.2.1 Sample Prefixes

If a prefix is required, use the following guidelines. Prefixes are **ONLY** used for constituents.

12.2.1.1 Army Ranks

| | |
|------|-------------------------|
| PVT | Buck Private |
| PV2 | Private |
| PFC | Private First Class |
| SEC | Specialist |
| SGT | Sergeant |
| SSG | Staff Sergeant |
| SFC | Sergeant First Class |
| MSG | Master Sergeant |
| 1SG | First Sergeant |
| SGM | Staff Sergeant Major |
| CSM | Command Sergeant Major |
| WO1 | Warrant Officer |
| CWO2 | Chief Warrant Officer 2 |
| CWO3 | Chief Warrant Officer 3 |
| CWO4 | Chief Warrant Officer 4 |
| CWO5 | Chief Warrant Officer 5 |
| 2LT | Second Lieutenant |
| 1LT | First Lieutenant |
| CPT | Captain |
| MAJ | Major |
| LTC | Lieutenant Colonel |
| COL | Colonel |
| BG | Brigadier General |
| MG | Major General |
| LTG | Lieutenant General |
| GEN | General |

12.2.1.2 Marine Corps Ranks

| | |
|--------|-------------------------|
| PVT | Private |
| PFC | Private First Class |
| LCPL | Lance Corporal |
| CPL | Corporal |
| SGT | Sergeant |
| SSGT | Staff Sergeant |
| GYSGT | Gunnery Sergeant |
| MSGT | Master Sergeant |
| 1STSGT | First Sergeant |
| MGYSGT | Master Gunnery Sergeant |
| SGTMAJ | Sergeant Major |
| WO1 | Warrant Officer |
| CWO2 | Chief Warrant Officer 2 |
| CWO3 | Chief Warrant Officer 3 |
| CWO4 | Chief Warrant Officer 4 |
| CWOS | Chief Warrant Officer 5 |
| 2LT | Second Lieutenant |
| 1LT | First Lieutenant |
| CAPT | Captain |
| MAJ | Major |
| LTCOL | Lieutenant Colonel |
| COL | Colonel |
| BGEN | Brigadier General |
| MAJGEN | Major General |
| LTGEN | Lieutenant General |
| GEN | General |

12.2.1.3 Navy Ranks

| | |
|------------|---|
| AR, FR, SR | Seaman Recruit |
| AA, FA, SA | Seaman Apprentice |
| AN, FN, SN | Seaman |
| P03 | Petty Officer Third Class |
| P02 | Petty Officer Second Class |
| P01 | Petty Officer First Class |
| CPO | Chief Petty Officer |
| SCPO | Senior Chief Petty Officer |
| MCPO | Master Chief Petty Officer |
| MCPON | Master Chief Petty Officer of the Navy |
| CWO2 | Chief Warrant Officer 2 |
| CWO3 | Chief Warrant Officer 3 |
| CWO4 | Chief Warrant Officer 4 |
| ENS | Ensign |
| LTJG | Lieutenant Junior Grade |
| LT | Lieutenant |
| LCDR | Lieutenant Commander |
| CDR | Commander |
| CAPT | Captain |
| RADM | Rear Admiral |
| VADM | Vice Admiral |
| ADM | Admiral |

12.2.1.4 Air Force Ranks

| | |
|-------|--------------------------|
| AB | Airman Basic |
| AMN | Airman |
| A1C | Airman First Class |
| SRA | Senior Airman |
| SSgt | Staff Sergeant |
| TSgt | Technical Sergeant |
| MSgt | Master Sergeant |
| SMSgt | Senior Master Sergeant |
| CMSgt | Chief Master Sergeant |
| 2dLt | Second Lieutenant |
| 1stLt | First Lieutenant |
| CPT | Captain |
| MAJ | Major |
| LTCOL | Lieutenant Colonel |
| COL | Colonel |
| BGEN | Brigadier General |
| MAJGE | Major General Lieutenant |
| N | Commander |
| LTGEN | Lieutenant General |
| GEN | General |

12.2.1.5 Other Prefixes

| | |
|--------|-------------------------|
| Amb. | Ambassador |
| Bishop | Bishop |
| Bro. | Brother |
| CEO | Chief Executive Officer |
| CFO | Chief Financial Officer |
| COO | Chief Operating Officer |
| Dean | Dean |
| Dir. | Director |
| Dr. | Doctor |
| Exe. | Executive |
| Fr. | Father |
| Gov. | Governor |
| Hon. | Honorable |
| Judge | Judge |
| M. | Monsieur |
| Miss | Miss |
| Mme. | Madame |
| Mr. | Mr. |
| Mrs. | Mrs. |
| Ms. | Miss or Madame |
| Pres. | President |
| Prof. | Professor |
| Rabbi | Rabbi |
| Rep. | Representative |
| Rev. | Reverend |
| Sen. | Senator |
| Sr. | Senior |
| Sra. | Senora |
| Sr. VP | Senior Vice President |
| Srta. | Senorita |
| VP | Vice President |

Note: This list is not exhaustive. For non-listed prefixes, see the Abbreviation section of Webster's Dictionary.

12.3 Procedures

13 Suffix Codes – Names

13.1 *General*

13.2 *Standards*

13.2.1 **Sample Suffixes**

If a suffix is known, use the following guidelines. Normally suffixes are used with Constituent names.

| | |
|--------|------------------------------------|
| CPA | Certified Public Accountant |
| D.C. | Doctor of Chiropractic |
| D.D.S. | Dentist |
| D.M.D. | Doctor of Dental Medicine |
| D.O. | Doctor of Osteopathy |
| D.V.M. | Doctor of Veterinary Medicine |
| Esq. | Esquire |
| II | The Second |
| III | The Third |
| IV | The Fourth |
| J.D. | Juris Doctor |
| Jr. | Junior |
| LL.D. | Doctor of Laws |
| M.D. | Doctor of Medicine |
| O.D. | Doctor of Optometry |
| PhD | Doctor of Philosophy |
| Ret. | Retired |
| RN | Registered Nurse |
| Sr. | Senior |
| USA | United States Army |
| USAR | United States Army Reserve |
| USAF | United States Air Force |
| USAFR | United States Air Force Reserve |
| USCG | United States Coast Guard |
| USMC | United States Marine Corps |
| USMCR | United States Marine Corps Reserve |
| USN | United States Navy |
| USNR | United States Navy Reserve |

Note: This list is not exhaustive. For non-listed prefixes, see the Abbreviation section of Webster's Dictionary.

13.3 *Procedures*

14 Citizenship, Veteran and Legacy Information, Religion Code, Driver's License Information

14.1 *General*

14.2 *Standards*

14.2.1 **U.S. Citizen Type**

If the person is a student or 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 the U.S. citizenship is not known.

14.2.2 **Legacy Code**

Currently, Institutional Advancement and Human Resource do not maintain Legacy Code. Therefore, this data standard will be updated when the Banner Student Module is implemented. A Legacy Code identifies a relative or friend with whom the University had or has a relationship. For example, if your mother were an alumna of the University, your legacy would be mother.

14.2.3 **Veteran File Number**

The Office of the Registrar keeps and maintains this information for students. This information will not be collected or maintained by Human Resources or Institutional Advancement.

14.2.4 **Religion Code**

The University will **NOT** collect or maintain religion data.

14.2.5 **Driver's License Information**

The University will **NOT** maintain driver's license data. Financial Aid will collect but not maintain this information.

14.3 *Procedures*

15 Confidential Records

15.1 General

15.2 Standards

15.2.1 Confidential Information Indicator

If a person completes a “Request to Withhold Information” form (Figure 15.0), then the student's directory information will **NOT** be disclosed to the public.

15.2.2 Disclosure of Student Information

15.2.2.1 Buckley Amendment

Students have a right to inspect their education records at the University and to request amendment to those records if they believe them to be inaccurate. The FERPA law (also known as the Buckley Amendment), and its implementing regulations, may be reviewed in the Office of the Registrar, University Hall, B133. A student has the right to file a complaint with the U.S. Department of Education concerning alleged failures by the University of Denver to comply with FERPA requirements with:

*Family Policy Compliance Office
U.S. Department of Education
400 Maryland Avenue, SW
Washington, DC 20202-4605*

15.2.2.2 Directory Information

The law provides that “Directory Information” may be released without the consent of the student unless s/he has specifically asked that prior consent be obtained. The University of Denver designates the following student information as “Directory Information”:

The student's full name, address (local and home/permanent), telephone number, campus electronic mail address, digitized I.D. photograph, date and place of birth, major field of study, full time or part time status, class (i.e. sophomore, junior, etc.), participation in officially recognized activities and sports, weight and height of members of athletic teams, dates of attendance, anticipated date of graduation, degrees and awards received, the most recent previous educational agency or institution attended by the student.

15.2.2.3 Disclosure Policies

The University of Denver assumes that failure on the part of any student to specifically request the withholding of categories of information indicates individual approval for disclosure.

- Any student wishing that directory information not be released must submit a "Request to Withhold Information form (see Figure 15.0) to the Office of the Registrar, University Hall, B133. **This form must be completed each year by October 1; or, if entering the University in January, by February 1; if entering in March, by April 1.**
- Parents who claim students as dependents on their Federal Income Tax form are entitled to receive grades and other information as provided by FERPA. Parents need to complete a "Parental Statement" form (Figure 15.1) during the Autumn quarter in each year of the student's attendance, available from and to be submitted to the Office of the Registrar.
- University Officials with a "legitimate educational interest" may receive all student data, including mailing labels, regardless of any restrictions, as provided by FERPA.

- “A legitimate educational interest” is an interest directly related to fulfilling Official University responsibilities or assignments of the person obtaining the information. University officials with legitimate educational interests include the following: faculty, staff persons in academic departments, academic services for advising, Office of the Registrar, Campus Safety, Student Health Services, Institutional Research, accounting and admission offices, the Division of Athletics, Recreation and Wellness, the Chancellor, vice-chancellors, the Provost, vice-provosts and their staffs. It also may include those University students who are selected to serve as members of University committees that select students for membership in honor societies or University awards. However, access to education records by such students is limited to access to information directly bearing on the membership matter or award being considered by the committee on which the student serves. **Any student may request that his or her education records not be reviewed by students serving on such committees by notifying the Office of the Registrar in writing by October 1 each year; or, if entering the University Winter quarter, by February 1; if entering Spring quarter, by April 1.**
- A student’s record may be released in compliance with a court order or subpoena. The Office of the Registrar or other official will make a reasonable effort to notify the student in advance of compliance.
- Student information may be released for health and emergency reasons.

- Students wishing to inspect their education records must complete a request form that can be obtained from the Office of the Registrar. Upon receipt of the completed form, the Registrar will verify that the requesting party is a student or former student. The student will then be given the form to present to the office or offices maintaining the Record(s). Access will be granted within 45 days of the date that the University's Registrar receives the request.
- If a student believes information contained in his or her education record is inaccurate, misleading, or otherwise inappropriate, s/he may request that the record be amended. The student may place a statement in the record commenting on the contested information or stating why s/he disagrees with the information. Whenever the University subsequently discloses the record to which the statement relates the statement will be included with the record. The student may ask for a hearing on the University's denial of any request to amend an education record.

15.3 *Procedures*

Figure 15.0

Office of the Registrar

2197 S. University Blvd.
Denver, CO 80208
(303) 871-4033



Request to Withhold Information

The provisions of the Family Rights and Privacy Act of 1974 and University policy allows students to withhold certain information about their attendance at the University. The University has the intent to honor requests of students who wish to withhold information.

A student's record may be subpoenaed which requires this office to release all information about a student's enrollment. Subpoenas normally involve former students. These occurrences are very rare, and an attempt is made by this office to contact the student before releasing any information. In cases where a parent is financially responsible for your education and provides appropriate certification, grades will be sent at the end of the quarter upon request. Student's who do not want their grades releases will need to work with parents or legal representatives.

The Family Rights and Privacy Act (also known as the Buckley Amendment) lists the following as "public information" that can be released without student consent: student's full name, address (local and home/permanent), telephone number, campus electronic mail address, digitized I.D. photograph, date and place of birth, major field of study, full time or part time status, class (i.e. sophomore, junior, etc.), participation in officially recognized activities and sports, weight and height of members of athletic teams, dates of attendance, anticipated date of graduation, degrees and awards received and the most recent previous educational agency or institution attended by the student.

The "public information" can be withheld as requested by students except for the conditions listed above. In all cases, academic information is protected except for the above conditions.

List below the information you wish to have withheld.

Print name: _____

Student # _____ SS#: _____

Address: _____

Signature: _____ Date: _____

Figure 15.1



UNIVERSITY OF
DENVER

Office of the Registrar
2197 S. University Blvd.
Denver, CO 80208
303.871.2284
Fax 303.871.4300

2000/2001 ACADEMIC YEAR

PARENTAL STATEMENT

I do hereby certify that I am the parent or legal guardian of _____, a student at the University of Denver. I further certify that as of this date, said student is a legal dependent of mine, and that the status of dependent is reported on my federal income tax report. Because of this status of dependency, I understand that I may request *academic* information (grades, transcripts, course information, grade point average) under the conditions of the Family Rights and Privacy Act of 1974 (Buckley Amendment).

A new parental statement form **must be** filed each September in the Office of the Registrar if you are to receive grade reports/transcript of your student's work at the University of Denver.

Signature: _____

Print Name: _____

Mailing Address: _____

City, State & Zip Code: _____

Date: _____

Please return to: Office of the Registrar
University of Denver
2197 S. University Blvd.
Denver, CO 80208-2284

or fax to: (303) 871-4300