



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.



Table of Contents

| | | |
|--------|--|----|
| 1 | BANNER NAME AND ID SEARCH..... | 7 |
| 1.1 | GENERAL..... | 7 |
| 1.2 | STANDARDS..... | 7 |
| 1.3 | PROCEDURES..... | 7 |
| 1.4 | STANDARD CHANGE RECORD..... | 7 |
| 2 | BANNER ID..... | 8 |
| 2.1 | GENERAL..... | 8 |
| 2.2 | STANDARDS..... | 8 |
| 2.2.1 | <i>Standards for Person ID.....</i> | 8 |
| 2.2.2 | <i>Standards for Non-Person ID.....</i> | 9 |
| 2.3 | GUIDELINES..... | 11 |
| 2.3.1 | <i>Creating a Person ID.....</i> | 11 |
| 2.3.2 | <i>Creating a “SMART” Non-Person ID.....</i> | 11 |
| 2.3.3 | <i>Creating a Non-Person Financial Aid Lender ID.....</i> | 13 |
| 2.3.4 | <i>Creating a Non-Person Financial Aid Guarantor ID.....</i> | 13 |
| 2.3.5 | <i>Creating a Non-Person Financial Aid Servicer ID.....</i> | 13 |
| 2.4 | STANDARD CHANGE RECORD..... | 13 |
| 3 | NAMES..... | 14 |
| 3.1 | GENERAL..... | 14 |
| 3.2 | STANDARDS..... | 14 |
| 3.2.1 | <i>Case.....</i> | 14 |
| 3.2.2 | <i>Initials and Abbreviations.....</i> | 15 |
| 3.2.3 | <i>Persons With Two or More Given Names.....</i> | 15 |
| 3.2.4 | <i>Spaces in Last Names.....</i> | 16 |
| 3.2.5 | <i>Long Names.....</i> | 16 |
| 3.2.6 | <i>Persons with One Name.....</i> | 16 |
| 3.2.7 | <i>Punctuation.....</i> | 16 |
| 3.2.8 | <i>Prefixes and Suffixes.....</i> | 16 |
| 3.2.9 | <i>Previous Names.....</i> | 17 |
| 3.2.10 | <i>Legal Name.....</i> | 17 |
| 3.2.11 | <i>Preferred First Name.....</i> | 17 |
| 3.2.12 | <i>Non-Person Names.....</i> | 18 |
| 3.2.13 | <i>Name Type and Description.....</i> | 18 |
| 3.3 | GUIDELINES..... | 18 |
| 3.3.1 | <i>Adding New Name Records.....</i> | 18 |
| 3.3.2 | <i>Name Change Policies.....</i> | 18 |
| 3.3.3 | <i>Change Form.....</i> | 19 |
| 3.4 | STANDARD CHANGE RECORD..... | 19 |
| 4 | ADDRESSES..... | 21 |
| 4.1 | GENERAL..... | 21 |
| 4.2 | STANDARDS..... | 21 |
| 4.2.1 | <i>Symbols.....</i> | 21 |
| 4.2.2 | <i>Street Names.....</i> | 22 |
| 4.2.3 | <i>Punctuation.....</i> | 22 |
| 4.2.4 | <i>Secondary Address Unit Designators.....</i> | 22 |
| 4.2.5 | <i>Compass Directions.....</i> | 23 |
| 4.2.6 | <i>Street Address and P.O. Box.....</i> | 23 |
| 4.2.7 | <i>Abbreviations for Street Designators.....</i> | 24 |
| 4.2.8 | <i>Sources for Additional Information.....</i> | 24 |

| | | |
|-----------|--|----|
| 4.2.9 | City..... | 24 |
| 4.2.10 | State and Province..... | 25 |
| 4.2.11 | County..... | 25 |
| 4.2.12 | Zip or Postal Code..... | 25 |
| 4.2.12.1 | United States..... | 25 |
| 4.2.12.2 | Canada..... | 26 |
| 4.2.13 | Nation..... | 26 |
| 4.2.14 | Military Address..... | 26 |
| 4.2.14.1 | Overseas Locations..... | 26 |
| 4.2.14.2 | Domestic Locations..... | 27 |
| 4.2.15 | International Addresses..... | 27 |
| 4.2.16 | Hierarchy of Modifications..... | 27 |
| 4.2.17 | Address Types..... | 28 |
| 4.2.18 | Office(s) responsible for creation and changes of each address type..... | 30 |
| 4.2.19 | Address Sources..... | 31 |
| 4.3 | GUIDELINES..... | 32 |
| 4.4 | STANDARD CHANGE RECORD..... | 32 |
| 5 | TELEPHONE NUMBERS..... | 33 |
| 5.1 | GENERAL..... | 33 |
| 5.2 | STANDARDS..... | 33 |
| 5.2.1 | Telephone Types..... | 33 |
| 5.2.1.1 | General Telephone Types..... | 33 |
| 5.2.1.2 | Address Telephone Types..... | 33 |
| 5.2.2 | Office(s) responsible for creation and changes of each Address telephone type..... | 34 |
| 5.2.3 | Telephone Numbers..... | 35 |
| 5.2.3.1 | Area Code..... | 35 |
| 5.2.3.2 | Phone Number..... | 35 |
| 5.2.3.3 | Extension..... | 35 |
| 5.2.4 | International Telephone Numbers..... | 35 |
| 5.2.4.1 | International access code field..... | 36 |
| 5.2.4.1.1 | Country Code..... | 36 |
| 5.2.4.1.2 | City Code..... | 36 |
| 5.2.4.2 | North American Numbering Plan (NANP)..... | 36 |
| 5.3 | GUIDELINES..... | 37 |
| 5.4 | STANDARD CHANGE RECORD..... | 37 |
| 6 | EMAIL..... | 38 |
| 6.1 | GENERAL..... | 38 |
| 6.2 | STANDARDS..... | 38 |
| 6.3 | GUIDELINES..... | 38 |
| 6.4 | STANDARD CHANGE RECORD..... | 38 |
| 7 | CALENDAR DATES..... | 39 |
| 7.1 | GENERAL..... | 39 |
| 7.2 | STANDARDS..... | 39 |
| 7.2.1 | Year..... | 39 |
| 7.2.2 | Month and day..... | 39 |
| 7.2.3 | Dates in Job Submission..... | 40 |
| 7.2.4 | Dates in Reports and Process Output..... | 40 |
| 7.2.5 | Dates in Query Mode..... | 40 |
| 7.3 | GUIDELINES..... | 40 |
| 7.4 | STANDARD CHANGE RECORD..... | 40 |
| 8 | GENDER..... | 41 |
| 8.1 | GENERAL..... | 41 |
| 8.2 | STANDARDS..... | 41 |

| | | |
|--------|---|----|
| 8.3 | GUIDELINES | 41 |
| 8.4 | STANDARD CHANGE RECORD..... | 41 |
| 9 | SOCIAL SECURITY NUMBER (SSN) | 42 |
| 9.1 | GENERAL..... | 42 |
| 9.2 | STANDARDS..... | 42 |
| 9.3 | GUIDELINES | 42 |
| 9.4 | STANDARD CHANGE RECORD..... | 42 |
| 10 | DATE OF BIRTH | 43 |
| 10.1 | GENERAL..... | 43 |
| 10.2 | STANDARDS..... | 43 |
| 10.3 | GUIDELINES | 43 |
| 10.4 | STANDARD CHANGE RECORD..... | 43 |
| 11 | MARITAL CODE..... | 44 |
| 11.1 | GENERAL..... | 44 |
| 11.2 | STANDARDS..... | 44 |
| 11.3 | GUIDELINES | 44 |
| 11.4 | STANDARD CHANGE RECORD..... | 44 |
| 12 | ETHNIC CODES | 45 |
| 12.1 | GENERAL..... | 45 |
| 12.2 | STANDARDS..... | 45 |
| 12.3 | GUIDELINES | 45 |
| 12.4 | STANDARD CHANGE RECORD..... | 45 |
| 13 | DECEASED INFORMATION | 46 |
| 13.1 | GENERAL..... | 46 |
| 13.2 | STANDARDS..... | 46 |
| 13.3 | GUIDELINES | 46 |
| 13.4 | STANDARD CHANGE RECORD..... | 46 |
| 14 | PREFIX CODES – NAMES | 47 |
| 14.1 | GENERAL..... | 47 |
| 14.2 | STANDARDS..... | 47 |
| 14.2.1 | <i>Default Prefix</i> | 47 |
| 14.2.2 | <i>Sample Prefixes</i> | 47 |
| 14.3 | GUIDELINES | 48 |
| 14.4 | STANDARD CHANGE RECORD..... | 48 |
| 15 | SUFFIX CODES – NAMES | 49 |
| 15.1 | GENERAL..... | 49 |
| 15.2 | STANDARDS..... | 49 |
| 15.3 | GUIDELINES | 49 |
| 15.4 | STANDARD CHANGE RECORD..... | 50 |
| 16 | CITIZENSHIP AND INTERNATIONAL PERSONS INFORMATION | 51 |
| 16.1 | GENERAL..... | 51 |
| 16.2 | STANDARDS..... | 51 |
| 16.2.1 | <i>U.S. Citizen Type</i> | 51 |
| 16.2.2 | <i>Country of Citizenship</i> | 51 |
| 16.2.3 | <i>Visa Status</i> | 52 |
| 16.3 | GUIDELINES | 52 |
| 16.4 | STANDARD CHANGE RECORD..... | 52 |

| | | |
|--------|--|----|
| 17 | VETERAN INFORMATION | 53 |
| 17.1 | GENERAL..... | 53 |
| 17.2 | STANDARDS..... | 53 |
| 17.2.1 | <i>Veteran File Number</i> | 53 |
| 17.2.2 | <i>Veteran Category</i> | 53 |
| 17.3 | GUIDELINES..... | 53 |
| 17.4 | STANDARD CHANGE RECORD..... | 53 |
| 18 | LEGACY INFORMATION (FULL INFORMATION TO BE INCLUDED AT A LATER DATE) | 54 |
| 18.1 | GENERAL..... | 54 |
| 18.2 | STANDARDS..... | 54 |
| 18.3 | GUIDELINES..... | 54 |
| 18.4 | STANDARD CHANGE RECORD..... | 54 |
| 19 | RELIGION CODES..... | 55 |
| 19.1 | GENERAL..... | 55 |
| 19.2 | STANDARDS..... | 55 |
| 19.3 | GUIDELINES..... | 55 |
| 19.4 | STANDARD CHANGE RECORD..... | 55 |
| 20 | DRIVER'S LICENSE INFORMATION | 56 |
| 20.1 | GENERAL..... | 56 |
| 20.2 | STANDARDS..... | 56 |
| 20.3 | GUIDELINES..... | 56 |
| 20.4 | STANDARD CHANGE RECORD..... | 56 |
| 21 | CONFIDENTIALITY OF STUDENT RECORDS..... | 57 |
| 21.1 | GENERAL..... | 57 |
| 21.2 | STANDARDS..... | 57 |
| 21.3 | GUIDELINES..... | 58 |
| 21.3.1 | <i>FERPA</i> | 58 |
| 21.3.2 | <i>Directory Information</i> | 58 |
| 21.3.3 | <i>Disclosure Policies</i> | 58 |
| 21.3.4 | <i>Directory Exclusion</i> | 58 |
| 21.4 | STANDARD CHANGE RECORD..... | 58 |
| 22 | LETTER NAMES | 59 |
| 22.1 | GENERAL..... | 59 |
| 22.2 | STANDARDS..... | 59 |
| 22.3 | GUIDELINES..... | 59 |
| 22.4 | STANDARD CHANGE RECORD..... | 59 |
| 23 | QUICKFLOW NAMES | 60 |
| 23.1 | GENERAL..... | 60 |
| 23.2 | STANDARDS..... | 60 |
| 23.3 | GUIDELINES..... | 60 |
| 23.4 | STANDARD CHANGE RECORD..... | 60 |
| 24 | APPENDIX A – DATA STANDARDS CHANGE REQUEST FORM | 61 |
| 24.1 | DATA STANDARDS CHANGE REQUEST FORM | 62 |
| 25 | APPENDIX B – SHARED TABLES IN BANNER AS OF 07/01/2002..... | 63 |
| 25.1 | TABLE 1: SHARED DATA TABLES..... | 64 |
| 25.2 | TABLE 2: SHARED VALIDATION TABLES..... | 65 |
| 25.3 | TABLE 3: DATA STEWARDSHIP OF BANNER TABLES..... | 68 |

1 Banner Name and ID Search

1.1 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.

1.2 Standards

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

1.3 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.

1.4 Standard Change Record

| | |
|------------|---|
| 10/28/2002 | 1.2 Standards Added standards that searches should include *OAIDEN and GUIALTI screens before adding person records. |
| | 1.3 Procedures Added information regarding the new GUIALTI screen available with the April 2002 release. |

2 Banner ID

2.1 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 |
| RPAIDEN | FINANCIAL AID |
| PPAIDEN | HUMAN RESOURCES |
| FTMVEND | FINANCE ('non-person' vendors) |
| FOAIDEN | FINANCE ('person' vendors) |
| APAIDEN | ALUMNI/DEVELOPMENT |

2.2 Standards

2.2.1 Standards for Person ID

Person IDs can appear in three 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

2.2.2 Standards for Non-Person ID

Non-person IDs can appear in four different formats.

Format 1:

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

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

Format 2:

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 3:

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 4:

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 |

| Institution Name | Function | ID Type | Banner ID |
|------------------|---|------------------------|-----------|
| Comerica Bank | financial aid lender serviced by UniPac | Format 2 – lender code | 822660 |

2.3 Guidelines

2.3.1 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).

2.3.2 Creating a "SMART" Non-Person ID

"SMART" NON-PERSON ID CODES

A PROCEDURE FOR ASSIGNING A VENDOR NUMBER FOR BUSINESS CONCERNS AND ORGANIZATIONS

1. Only capital letters or numbers will be used:

| | | | |
|-----------|--------------------------|----|------------|
| Example: | Zellerbach Paper Company | or | 3M Company |
| Input as: | ZELPAP | or | 3MCOM |

2. Do not use spaces, hyphens, periods, etc. in vendor number:

| | | | |
|-----------|----------------------|----|----------------|
| Example: | U-Haul International | or | ABC-CLIO, Inc. |
| Input as: | UHAINT | or | ABCCLI |

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 number 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 a vendor name is separated by a hyphen or a slash, treat it as two separate names:

| | |
|-----------|--------------------------|
| Example: | Perkin-Elmer Corporation |
| Input as: | PERELM |

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

Example: US Welding Inc
Input as: USWEL

8. 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

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

and of
by the
for

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

Example: The Earle
Input as: EARLE

10. If these names appear in the second or subsequent names of the vendors, drop for vendor number purposes only:

academy institute
association international
department school

Example: Electronic School Supply or Koch International Corp
Input as: ELESUP or KOCCOR

11. For a vendor that is a university, input the name of the university first:

Example: University of Washington or University of Iowa
Input as: WASUNI or IOWUNI

12. 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

13. 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

2.3.3 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.

2.3.4 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.

2.3.5 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.

2.4 Standard Change Record

| | |
|------------|--|
| 8/5/2002 | 2.3.1 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 | 2.3.5 Creating a Non-Person Financial Aid Servicer ID Section added |

3 Names

3.1 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 |
| RPAIDEN | FINANCIAL AID |
| PPAIDEN | HUMAN RESOURCES |
| FTMVEND | FINANCE ('non-person' vendors) |
| FOAIDEN | FINANCE ('person' vendors) |
| APAIDEN | ALUMNI/DEVELOPMENT |

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

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

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

Non-Person Name – maximum length 60 characters

3.2 Standards

Enter the last, first and middle names exactly as the person has indicated. If given the full middle name, enter the full middle name. Do NOT change a full name to an initial. Always use normal upper- and lower-case letters for names.

3.2.1 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.

3.2.2 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.

3.2.3 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

3.2.4 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

3.2.5 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.

3.2.6 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.

3.2.7 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 | | | | |

3.2.8 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, DVM, 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

3.2.9 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.

3.2.10 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.

3.2.11 Preferred First Name

Offices may enter a name in this field.

Examples:

Current Name: William Knight
Preferred First Name: Bill

Current Name: D Mark Williams
Preferred First Name: Mark

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

3.2.12 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

3.2.13 Name Type and Description

The Current Name field in Banner does not require a name type to be associated with a name. The name type of "LGCY" automatically populates during conversion. In addition, EMU has approved use of SORT, MAID and AKA name types.

3.3 Guidelines

3.3.1 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%

3.3.2 Name Change Policies

Faculty will direct name change requests to Academic Human Resources. Staff will direct name change requests to Administrative Human Resources. Students will direct name change requests to Office of Records and Registration. Faculty/staff who are also students may direct their requests to the Office of Records and Registration, 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.

3.3.3 Change Form

See Figure 1.0.

3.4 Standard Change Record

8/13/2003 3.2.13 Name Type and Description
Approved use of SORT, MAID and AKA.

4 Addresses

4.1 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.

4.2 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.

4.2.1 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.

4.2.2 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.

4.2.3 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.

4.2.4 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 4.2.2.6 – Sources for Additional Information.)

4.2.5 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.

4.2.6 Street Address and P.O. Box

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

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

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

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

4.2.7 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 |

4.2.8 Sources for Additional Information

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

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

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

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

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

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

4.2.9 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 could also be the city of Rawsonville. If requested, manually change

the city to Rawsonville following the standards below.) All information is typed in upper/lower case format, i.e. not all caps or all lower. Spell out city names in their entirety. If it is necessary to abbreviate city names to fit within the 20 characters allowed by Banner, use abbreviation standards described herein or in the US Postal Service Postal Addressing Standards.

Examples:

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

4.2.10 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 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.

4.2.11 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.

4.2.12 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.

4.2.12.1 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

4.2.12.2 Canada

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

Examples:

T2T 2Y5
R2L 1N4

4.2.13 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. Banner is configured to automatically enter the county name when a zip code is entered. 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.

4.2.14 Military Address

4.2.14.1 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

4.2.14.2 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

4.2.15 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.

4.2.16 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

4.2.17 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.

| Code | Description | Explanation |
|------|----------------|--|
| 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. |
| BU | Business | 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. Approved format for on-campus BU addresses includes "CAMPUS" as the city and "XXXXX" as the zip. |
| CA | Campus | Campus Address for EMU Employees An EMU employee's physical location (office/department) on campus. List in primary order if employee works in multiple locations. This |

address will be used to create the campus directory and for any on-campus mailings to employees. Accounts payable will use this address to refund money to an employee. This address type is not used for payroll purposes.

Approved format for CA addresses is as follows:

Office
Room Building
Eastern Michigan University
Ypsilanti, MI 48197

| | | |
|----|----------------|--|
| DM | Diploma | 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. |
| EB | Entity Billing | Entity Billing Address This address type is used for invoicing of Third Party Billing entities (within Student Business Services). |
| GR | Grant | Grant Billing Address Used by the Grants Accounting Office in the Finance Division. |
| I2 | I20 | I-20 Address 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. |
| LO | Local | Local Mailing Address (Off-campus) This address type is used for students and represents an off-campus, local address that is different than their MA-permanent mailing address. 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. |
| MA | Permanent | Permanent Mailing Address 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. (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.) |
| PA | Parent | Parent Address of a Student. This address type is created, maintained and deleted by Student Business Services for parent loans.(Required by Banner for tape load processing) |

NOTE: It has not been yet been defined how Banner uses this address type for the tape load process.

- RF Refund Refund Mailing Address
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.

- 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 for student use only.

- 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)

4.2.18 Office(s) responsible for creation and changes of each address type.

| ADDRESS TYPE | DESCRIPTION | OWNER |
|--------------|----------------------------------|---------------------------|
| AB | Alumni Billing Address | Alumni/Development |
| BI | Billing Address | Finance |
| BU | Business Address | Finance |
| CA | Campus Address for EMU Employees | Human Resources (all) |
| DM | Diploma Mailing Address | Records & Registration |
| EB | Entity Billing Address | Student Business Services |
| GR | Grant Billing Address | Finance |

| ADDRESS TYPE | DESCRIPTION | OWNER |
|--------------|---|--|
| I2 | I-20 Address | Admissions, Office of International Students |
| LO | Local Mailing Address (Off-campus) | Records & Registration |
| MA | Permanent Mailing Address | -Faculty/Staff – appropriate Human Resources -Recruits/applicants – Admissions -Students – Records & Registration -Donors – Alumni/Development |
| 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 | Admissions, Office of International Students, Records & Registration |
| 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 |

4.2.19 Address Sources

Sources of the address are shown on the STVASRC table.

| CODE | DESCRIPTION |
|------|-------------------------------|
| ACT | ACT TAPE |
| APP | Application |
| CERG | CE Registration Form |
| CONV | Conversion Address |
| FA | Financial Aid |
| GMAT | GMAT Tape |
| GRE | GRE Tape |
| MTTC | MTTC Tape |
| NCRU | NCCRU A Tape |
| POST | Post Office |
| PSAT | PSAT Tape |
| SAT | SAT Tape |
| SELF | Self Reported |
| TRAN | Transcript |
| UTC | Undergraduate Transfer Center |
| WEB | World Wide Web |
| XACP | Purchased Name – ACT Plan |
| XACT | Purchased Name – ACT |
| XNCR | Purchased Name – NCCRU A |
| XPSE | Purchased Name – PSAT |
| XSAT | Purchased Name – SAT |

4.3 Guidelines

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

4.4 Standard Change Record

- | | |
|------------|---|
| 7/31/2002 | 4.2.15 International Addresses Clarified that Canadian province codes should not be entered on the address line 3 but entered in the state/province code field. |
| 8/5/2002 | 4.2.12 ZIP/Postal Code Clarified that postal codes, for international addresses, if available, should be entered. 4.2.15 International addresses Clarified that postal codes, for international addresses, if available, should be entered in the ZIP/postal code field. |
| 10/28/2002 | 4.2.1 Symbols Clarified that “&” should never be used. |
| 08/01/03 | 4.2.17 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 4.2.18 Office(s) responsible... Added responsible office for new address types 4.2.19 Address Sources Added financial aid and undergraduate transfer center 4.3 Guidelines Added that inactive box should be checked when end dating an address |
| 10/13/03 | 4.2.17 Address Types Added Work Supplemental Added approved format for work and work supplemental addresses |

5 Telephone Numbers

5.1 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.

5.2 Standards

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

5.2.1 Telephone Types

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

5.2.1.1 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 |

5.2.1.2 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 |

| CODE | DESCRIPTION | EXPLANATION |
|-------------|--|--|
| CA | Campus Address Telephone Type | Telephone number associated with an EMU employee campus 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 |
| 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 | Telephone number associated with a special mailing address |
| 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 | |

5.2.2 Office(s) responsible for creation and changes of each Address telephone type.

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

| ADDRESS TELEPHONE TYPE | DESCRIPTION | OWNER |
|------------------------|--|---|
| MA | Mailing Address Telephone Type | -Faculty/Staff – appropriate Human Resources - Recruits/applicants – Admissions -Students – Records & Registration -Donors – Alumni/ Development |
| PA | Parent Address Telephone Type | Student Business Services |
| RF | Refund Address Telephone Type | Student Business Services |
| RH | Residence Hall Address Telephone Type | Housing |
| SE | Seasonal Mailing Address Telephone Type | Alumni/Development |
| SM | Special Mailing Address Telephone Type | Admissions, Office of International Students, Records & Registration |
| 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 |

5.2.3 Telephone Numbers

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

5.2.3.1 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.

5.2.3.2 Phone Number

Enter the seven-digit number without inserting a hyphen.

Example: 4871849

5.2.3.3 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

5.2.4 International Telephone Numbers

International telephone numbers consist of four to seven digits.

5.2.4.1 International access code field

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

5.2.4.1.1 Country Code

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

5.2.4.1.2 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.

5.2.4.2 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 |

| | |
|---|-----|
| 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 |

5.3 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 with the address, are not stored with the address in the Banner tables. Telephone numbers must be changed on the SPATELE form, not the SPAIDEN form.

5.4 Standard Change Record

- | | |
|------------|---|
| 7/31/2002 | 5.2.1.1 General Telephone Types CL/FX changed to CE/FAX to match existing use in Banner |
| 10/28/2002 | 5.2.3.1 Area Code Clarified that converted phone numbers may not have an associated area code. |
| 08/01/03 | 5.2.1.1 General Telephone Types Added pager 5.2.1.2 Address Telephone Types Added Alumni Billing, Entity Billing, Seasonal 5.2.2 Office(s) responsible... Added responsible office for new address types 5.3 Guidelines Added that inactive box should be checked when end dating an address |
| 08/13/03 | 5.2.1.2 Address Telephone Types Added Work Supplemental 5.2.2 Office(s) responsible... Added responsible office for new address types |

6 Email

6.1 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.

6.2 Standards

| CODE | DESCRIPTION |
|------|---|
| EMU | EMU Email Address (not yet implemented) |
| PARN | Parent's Email Address |
| PERS | Personal Email Address |
| WORK | Work Email Address |

6.3 Guidelines

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

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.

6.4 Standard Change Record

| | |
|-----------|--|
| 11/5/2002 | 6.2 Standards Added PARN – Parent's email address |
| 08/13/03 | 6.2 Standards Added WORK – Work Email address |

7 Calendar Dates

7.1 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

7.2 Standards

7.2.1 Year

Always enter four digits for the year

Example: Enter 2002 as 2002 – not 02

7.2.2 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

7.2.3 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).

7.2.4 Dates in Reports and Process Output

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

7.2.5 Dates in Query Mode

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

7.3 Guidelines

7.4 Standard Change Record

8 Gender

8.1 General

Gender information is maintained for federal and state reporting purposes.

8.2 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.) |

8.3 Guidelines

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

8.4 Standard Change Record

7/16/2002 8.2 Standards
Changed from U (Unknown) to N (Not available) based on Banner baseline values.

9 Social Security Number (SSN)

9.1 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.

9.2 Standards

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

9.3 Guidelines

A person must present a copy of 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, make the change and then send a notification with the correct number to the Payroll Office.

Faculty will direct social security number change requests to Academic Human Resources. Staff will direct social security number change requests to Administrative Human Resources. Students will direct social security number change requests to Office of Records and Registration. Faculty/staff who are also students may direct their requests to the Office of Records and Registration, although the preferred office would be the appropriate Human Resources area. Donors should direct their request to EMU Foundation Gifts and Records.

9.4 Standard Change Record

10 Date of Birth

10.1 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).

10.2 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

10.3 Guidelines

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

A copy of the birth certificate, passport or drivers 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.

10.4 Standard Change Record

11 Marital Code

11.1 General

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

11.2 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 |

11.3 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.

11.4 Standard Change Record

8/5/2002

11.2 Standards

Corrected information to indicate marital status is found on the SPAPERS form (not SPAIDEN).

12 Ethnic Codes

12.1 General

Ethnicity is tracked for purposes of federal and state reporting requirements.

12.2 Standards

| ETHNIC CODE | DESCRIPTION |
|-------------|--------------------------------|
| AS | Asian |
| BL | Black, Non-Hispanic |
| HI | Hispanic |
| NA | American Indian/Alaskan Native |
| NX | Not Reported |
| PI | Pacific Islander |
| WH | White, Non-Hispanic |
| XX | Would Not Disclose |

12.3 Guidelines

An ethnic code must be entered for all persons entered on Banner (NX, not reported, is an acceptable code).

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.

When entering results of multi-racial self-identification questions, the multi-racial indicator (MR) should be input in the person comment codes section of Banner.

12.4 Standard Change Record

13 Deceased Information

13.1 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.

13.2 Standards

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

An annual review of, and end dating of, addresses for deceased persons will be conducted.

13.3 Guidelines

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

Check the General Person screen GUASYST to see which Banner applications track this person.

Using email, notify the contact person for each Banner application you identified in step 1. Include the following information in your email:

Name of Person
Banner ID
Date of Death (if known)
How you found out about it

| BANNER APPLICATION | CONTACT PERSON |
|------------------------|----------------------------------|
| Human Resources | Senior Information Systems Clerk |
| Student | Greg Peoples, Dean of Students |
| Financial Aid | Jennifer Tremewan |
| Finance | |
| Alumni and Development | Judy Williams, Gloria Thompson |

13.4 Standard Change Record

8/5/2002 13.2 Standards
-Added standard that all population selections are to search for, and exclude, deceased persons.
-Added annual review and end dating of addresses.

14 Prefix Codes – Names

14.1 General

A prefix represents a title that precedes a name.

14.2 Standards

14.2.1 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.)

14.2.2 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 |

14.3 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.

14.4 Standard Change Record

15 Suffix Codes – Names

15.1 General

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

15.2 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 |

15.3 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).

15.4 Standard Change Record

16 Citizenship and International Persons Information

16.1 General

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

Citizenship and related information is maintained by the following offices:

| | |
|-----------------------------------|--|
| Human Resources | for non-academic employees of EMU |
| Academic Human Resources | for academic employees of EMU |
| Office of Admissions | for persons applying as students |
| Office of Foreign Student Affairs | for students after they enroll. Also tracks information on certain non-citizens in the area who are not associated with EMU. |
| EMU Foundation | for donors 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.

16.2 Standards

16.2.1 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.

16.2.2 Country of Citizenship

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

16.2.3 Visa Status

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

16.3 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.

16.4 Standard Change Record

17 Veteran Information

17.1 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. |

17.2 Standards

17.2.1 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.

17.2.2 Veteran Category

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

| | |
|---------------------------------------|--|
| None | Non-Veteran |
| Other Eligible 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 |

17.3 Guidelines

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

17.4 Standard Change Record

8/5/2002 17.2 Standards
Changed subheadings to 17.2.1 Veteran File Number and 17.2.2 Veteran Category to match the SPAPERS record.
Added text to section 17.2.1 regarding input of data.

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

18.1 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.

18.2 Standards

18.3 Guidelines

18.4 Standard Change Record

19 Religion Codes

19.1 General

The University will NOT collect or maintain religion data.

19.2 Standards

19.3 Guidelines

19.4 Standard Change Record

20 Driver's License Information

20.1 General

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

20.2 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.

20.3 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.

20.4 Standard Change Record

21 Confidentiality of Student Records

21.1 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.

21.2 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 donor wishes to request confidentiality, a written request should be submitted to the EMU Foundation Gifts and Records 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 donors 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.

21.3 Guidelines

21.3.1 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.

21.3.2 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.

21.3.3 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.

21.3.4 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 "DIR" will be entered on the SPACMNT (Comment) form in General Person.

21.4 Standard Change Record

22 Letter Names

22.1 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.

22.2 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 |

22.3 Guidelines

22.4 Standard Change Record

23 Quickflow Names

23.1 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.

23.2 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 |
| 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 |

23.3 Guidelines

23.4 Standard Change Record

10/28/2002 Section created.

24 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 Process Team generating a change request must get the signature of the Data Standards Team member representing that module. The Data Standards Team 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.

DATA STANDARDS TEAM MEMBERS AS OF FEBRUARY, 2003

| Team Member | Banner Module(s) Represented |
|-------------------------------|--|
| Chris Shell, Team Leader | |
| Richard Byrd | ICT – Technical Considerations |
| Elizabeth Eicher | Financial Aid |
| Helen Gates-Bryant | Finance |
| Colleen Glaser | Human Resources |
| Rhonda Linderman | Payroll |
| Theresa Phelps | Student – Admissions & Recruiting |
| Annette Rurka | Advancement |
| Judy Salyer | Student – Accounts Receivable |
| Sherry Winterson | Student – Records & Registration, Academic History, Faculty Load, Buildings & Facilities |
| Sarah Welland, Scribe | |
| Maryann Shichtman, Ex-officio | Prior team leader |

24.1 Data Standards Change Request Form

SUBMITTED BY:
PROCESS TEAM:
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 TEAM MEMBER:
accepted by: _____ date: _____
name printed: _____

DATA STANDARDS TEAM RESOLUTION:

- Change Accepted
 Change Rejected
 Further Information Needed
Explanation:

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

This appendix contains three tables:

TABLE 1: Shared Data Tables

TABLE 2: Shared Validation Tables

TABLE 3: Data Stewards for Shared Validation Tables

TABLE 4: Shared Data Items

25.1 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 |

25.2 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 |
| GTVMAL | Email Type | XS | X | X | | |
| GTVEPN | Expenses | X | X | X | | |
| GTVMAIL | Mail Type | X | X | X | | |
| GTVENTYP | Name Type | X | X | XS | | |
| 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 |
| GXRANK | Bank Code Rule Form | | | | XS | X |
| GXVDIRD | Bank Routing Number | | | | XS | X |
| 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 |
| 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 |

| Table | Description | Student | Financial Aid | Alumni & Development | Finance | Human Resources |
|----------|---------------------------------|---------|---------------|----------------------|---------|-----------------|
| STVDLEV | Degree Level | XS | | | | X |
| STVDPLM | Diploma Type | XS | X | | | |
| STVEMPT | Employment Type | XS | X | | | |
| STVESTS | Enrollment Status | 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 | | |
| STVLEVEL | Level Code | XS | X | | | X |
| STVLGCY | Legacy | XS | | X | | X |
| STVMAJR | Major/Minor/Concentration Code | XS | X | X | | X |
| STVMDEQ | Medical Equipment Code | X | | | | X |
| STVMEDI | Medical Code | X | | | | X |
| STVMRCD | Meal Rate | XS | X | | | |
| STVMRTL | Marital Status Code | X | X | X | | XS |
| STVMSCD | Meal Assignment Status | XS | X | | | |
| STVNATN | Nation Code | XS | X | X | X | X |
| STVORIG | Originator Code | X | | X | | |
| STVPENT | Port of Entry Code | XS | | | | X |
| STVRATE | Student Fee Assessment Code | XS | X | | | |
| STVRDEF | Building/Room Attribute | XS | X | | | |
| STVRELG | Religion Code | X | | X | | X |
| STVRELT | Relation Code | X | | | | XS |
| STVRMST | Room Status | XS | X | | | |
| STVRRCD | Room Rate | XS | X | | | |
| STVRSTS | Course Registration Status | XS | X | | | |
| STVSBGI | Source/Background Institution | XS | X | X | | X |
| STVSITE | Site | XS | X | | | |
| STVSPON | International Student Sponsor | XS | X | | | |
| STVSTAT | State/Province Code | XS | X | X | X | X |
| STVSTST | Student Status | XS | X | | | |
| STVTADM | Test Score Administration Type | XS | X | | | |
| STVTELE | Telephone Type | XS | X | X | X | X |
| STVTEPR | Test Purpose | XS | X | | | |
| STVTERM | Term Type | XS | X | | | |
| STVTESE | Test Code | XS | X | | | |
| STVTSRC | Admission Test Score Source | XS | X | | | |
| STVVETC | Veteran Type | XS | X | | | |
| STVVITYP | VISA Type | XS | | | | X |
| STVWDRL | Student Withdrawal Status Codes | XS | X | | | |
| | | | | | | |
| TSACONT | Contract Authorization Form | XS | X | | | |
| TSAETC | Detail Code Control Form | XS | X | | | |
| TSAEXPT | Exemption Authorization Form | XS | X | | | |
| TVVAUTH | Authorization Validation Form | XS | X | | | |
| | | | | | | |

| Table | Description | Student | Financial Aid | Alumni & Development | Finance | Human Resources |
|---------|---------------------------------|---------|---------------|----------------------|---------|-----------------|
| 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 |

25.3 Table 3: Data Stewardship of Banner Tables

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

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

| Table | Description | Data Steward | Contact Information |
|---------|-------------------------------|------------------------------------|----------------------------------|
| FTVACCI | Account Index Code | Accounting | Timothy Griffith |
| FTVACCT | Account Code | Accounting | Timothy Griffith |
| FTVACTV | Activity Code | Accounting | Timothy Griffith |
| FTVCOAS | Chart of Account | Accounting | Timothy Griffith |
| FTVFUND | Fund Code | Accounting | Timothy Griffith |
| FTVLOCN | Location Code | Accounting | Timothy Griffith |
| FTVOBUD | Budget ID and Phase | Accounting | Timothy Griffith |
| FTVORGN | Organization Code | Accounting | Timothy Griffith |
| FTVPROG | Program Code | Accounting | Timothy Griffith |
| | | | |
| GTVEMAL | Email Type | Records & Registration | Vaughn Levy |
| GTVEXPN | Expenses | Data Standards Committee | Chris Shell |
| GTVMAIL | Mail Type | Data Standards Committee | Chris Shell |
| GTVNTYP | Name Type | Advancement | Annette Rurka |
| GTVSCOD | EDI/ISO Standard Code | Office of International Students | Paul Webb |
| GTVSUBJ | Subject Index | Data Standards Committee | Chris Shell |
| GTVZIPC | ZIP/Postal Code | Records & Registration | Vaughn Levy |
| GXRBank | Bank Code Rule Form | Accounting | Timothy Griffith |
| GXVDIRD | Bank Routing Number | Accounting | Timothy Griffith |
| | | | |
| SOATBRK | Student Term Break Form | Records & Registration | Marian Groce |
| STVACCG | Activity Category | Advancement | Annette Rurka |
| STVACTC | Activity Code | Advancement | Annette Rurka |
| STVACTP | Activity Type | Advancement | Annette Rurka |
| STVACYR | Academic Year Code | Records & Registration | Sherry Winterson |
| STVADMT | Admission Type | Admissions | Maryann Shichtman |
| STVAPDC | Admissions App Decision Codes | Admissions | Maryann Shichtman |
| STVAPST | Admission App Status | Admissions | Maryann Shichtman |
| STVASCD | Room Assignment Status | Housing | Colleen Tompkins |
| STVASRC | Address Source | Admissions | Maryann Shichtman |
| STVASTD | Academic Standing | Records & Registration | Chris Shell |
| STVATYP | Address Type Code | Records & Registration | Vaughn Levy |
| STVBLDG | Building | Records & Registration/ Housing | Marian Groce Colleen Tompkins |
| | | | |

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

| Table | Description | Data Steward | Contact Information |
|---------|------------------------------------|--|--------------------------------------|
| STVRMST | Room Status | Records & Registration/ Housing | Marian Groce Colleen Tompkins |
| STVRRCD | Room Rate | Housing | Colleen Tompkins |
| STVRSTS | Course Registration Status | Records & Registration | Marian Groce |
| STVSBGI | Source/Background Institution | Records & Registration (for colleges) Admissions (for High Schools & Other) | Chris Shell Maryann Shichtman |
| STVSITE | Site | Records & Registration | Marian Groce |
| STVSPON | International Student Sponsor | Admissions | Maryann Shichtman |
| STVSTAT | State/Province Code | Records & Registration | Vaughn Levy |
| STVSTST | Student Status | Records & Registration | Marian Groce/Chris Shell |
| STVTADM | Test Score Administration Type | Admissions | Maryann Shichtman |
| STVTELE | Telephone Type | Records & Registration | Vaughn Levy |
| STVTEPR | Test Purpose | Admissions | Maryann Shichtman |
| STVTERM | Term Type | Records & Registration | Sherry Winterson |
| STVTESC | Test Code | Admissions | Maryann Shichtman |
| STVTSRC | Admission Test Score Source | Admissions | Maryann Shichtman |
| STVVETC | Veteran Type | Veterans Office | Greg Peoples |
| STVVVYP | VISA Type | Office of International Students | Paul Webb |
| STVWDRL | Student Withdrawal Status Codes | Records & Registration | Marian Groce |
| | | | |
| TSACONT | Contract Authorization Form | Student Business Services | Thom Madden |
| TSADETC | Detail Code Control Form | Student Business Services | Thom Madden |
| TSAEXPT | Exemption Authorization Form | Student Business Services | Thom Madden |
| TVVAUTH | Authorization Validation Form | Student Business Services | Thom Madden |
| | | | |
| TTVBILL | Billing Code | Student Business Services | Thom Madden |
| TTVDCAT | Detail Category | Student Business Services | Thom Madden |
| TTVPAYT | Payment Type | Student Business Services | Judy Salyer |
| TTVSRCE | Charge/Payment Detail Source | Student Business Services | Judy Salyer |
| | | | |
| GURAPAY | Accounting Feed AP Table | Accounting | Timothy Griffith |
| GURFEED | Finance Transaction Input Table | Accounting | Timothy Griffith |
| | | | |

25.4 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 | RPAIDEN | FOAIDEN | APAIDEN | None |
| Name Type | PPAIDEN | SPAIDEN | RPAIDEN | FOAIDEN | APAIDEN | GTVNTYP |
| SSN | PPAIDEN | SPAPERS | ROAPERS | FOAPERS | APAPERS | None |
| Date of Birth | PPAIDEN | SPAPERS | ROAPERS | FOAPERS | APAPERS | None |
| Ethnicity | PPAIDEN | SPAPERS | ROAPERS | FOAPERS | APAPERS | STVETHN & PTRETHN |
| Gender | PPAIDEN | SPAPERS | ROAPERS | FOAPERS | APAPERS | None - Fixed at M, F, N |
| Marital* | PPAIDEN | SPAPERS | ROAPERS | FOAPERS | APAIDEN | STVMRTL |
| Citizenship | PPAIDEN | SPAPERS | ROAPERS | FOAPERS | APAPERS | STVCITZ |
| Deceased Information | PPAIDEN | SPAPERS | ROAPERS | 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 |
| Drivers License Information | PPAIDEN | | | | | None |
| Drivers License state | PPAIDEN | | | | | None |
| Drivers 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 |
| Emergency Contact Information* | PPAIDEN | SPAEMRG | | | | None |
| Emergency Contact Relationship | PPAIDEN | SPAEMRG | | | | STVREL T |
| General-Information | PPAGENL | SOAPCOL | | | | None |
| General-Source | PPAGENL | SOAPCOL | | | APAADEG | STVSBGI |

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

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