



Data Standards Manual

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Note: The Data Standards Committee, representatives from all Banner functional areas and the Information Technology department, were responsible for developing the data standards to be used with the Banner applications. Any changes recommended for the data standards in use at Southeast Missouri State University must be approved by the Data Standards Committee.

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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 prevent the creation of a “duplicate PIDM.” An appropriate procedure will be developed by each module. See your 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.

The GUIALTI search form allows you to search for a person using SSN.

1.4 Standard Change Record

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:

Form Name

SRAQUIK
SPAIDEN
RPAIDEN
PPAIDEN
FTMVEND
FOAIDEN
APAIDEN

Banner Module

STUDENT/RECRUIT
STUDENT
FINANCIAL AID
HUMAN RESOURCES
FINANCE (non-person vendors)
FINANCE (person vendors)
ALUMNI/DEVELOPMENT

2.2 Standards

2.2.1 Standards for Person ID

A system assigned ID will be established for all records 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 'S' followed by eight digits.

Example: S00002378

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
- Social Security Number is a searchable field, independent of name, in all Banner modules

2.2.2 Standards for Non-Person ID

Non-person IDs can appear in four different formats.

Format 1:

A 9 character 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 SEMO with a tax ID number will be treated as a non-person. 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 institutional entity 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 institutional entity 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 SEMO 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
Commerce Bank	A bank	Format 1	
Commerce Bank	Financial aid lender serviced by Sallie Mae	Format 2 – lender code	805979
Commerce 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.

2.3.2 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.

2.3.3 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.

2.3.4 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

4/12/05 In order to combat possible matching of social security numbers with Banner generated ID numbers, 2.2.1. was changed to reflect the addition of 'S' to generated IDs.

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:

FORM NAME

SPAIDEN
RPAIDEN
PPAIDEN
FTMVEND
FOAIDEN
APAIDEN

BANNER MODULE

STUDENT
FINANCIAL AID
HUMAN RESOURCES
FINANCE ('non-person' vendors)
FINANCE ('person' vendors)
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, IT 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 = MF / 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 person to have just 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, *except in the diploma name field—used for the purpose of printing diplomas*. 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, DVN, ESQ, etc) are considered Suffixes and should be entered in the SUFFIX field on the General Person forms (see section 14).

DO NOT include any punctuation with a prefix or suffix.

Example:

Correct:	Mr	Ms	Dr	MD	PhD
Incorrect:	Mr.	Ms.	Dr.	M.D.	Ph.D.

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

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

Example:

Place in last name field:	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

Steps:

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 Banner reports supplied with the system, but is available for use on any reports or letters generated and maintained by SEMO.

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
JF 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, SEMO has approved of PREV, NICK, AKA, ALT, DIPL, FRMM, and MAID name types. (previous, nickname, as known as, alternate name, former married, and maiden name)

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
Search as: %Earle%

3.3.2 Name Change Policies

Current and retired faculty and staff will direct name change requests to Human Resources. Students will direct name change requests to Office of Registrar. Faculty/staff who are also students may direct their requests to the Office of Registrar, although the preferred office would be Human Resources. Donors or Alumni will direct their name changes to the Alumni 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. Alumni is the only module to allow name change from the Banner Self-Service web access.

3.3.3 Change Form

See Figure 1.0 on next page.

Name & Social Security Number Change

Southeast Missouri State University
One University Plaza
Cape Girardeau, MO 63701

PLEASE PRINT legibly and allow a minimum of **ONE WEEK** for processing. Include the required documentation as indicated at the bottom of the page.

Name: _____

Southeast ID: _____

Check appropriate status (more than one may apply):

- Student (Return to: Registrar's Office, ms 3760)
- Alumnus (Return to: Alumni Services, ms 7300)
- Faculty/Staff (Return to: Human Resources, ms 3150)

Name Change:

Name as it currently appears on my Southeast records: (Please Print)

Last

First

Middle

Name Change Requested: (Please Print)

Last

First

Middle

Social Security Number Change:

Social Security Number in system: _____

Correct Social Security Number: _____

Signature: _____ Date: _____

(Signature is required for all requested changes.)

~~~ Attention ~~~

NAME and/or SOCIAL SECURITY NUMBER WILL BE CHANGED ONLY IF ONE OF THE ORIGINAL OFFICIAL DOCUMENTS IS SUBMITTED:

**- Social Security Card - Court Ordered Name Change Document - Driver's License**

**Office Personnel Only**

**Date Entered \_\_\_\_\_ / Initials \_\_\_\_\_**

### **3.4 Standard Change Record**

## **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 Alumni, Athletics, 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 U.S. Postal Service addressing requirements. According to the U.S. 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 Information Technology has assumed the responsibility of maintaining a yearly contract with the U.S. Postal Service to provide monthly updates to the zip code tables and related City, State, County relationships. The monthly update disks will be used 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 when 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.

Example:

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 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 ([pe.usps.gov/cpim/ftp/pubs/Pub28/pub28.pdf](http://pe.usps.gov/cpim/ftp/pubs/Pub28/pub28.pdf)) for abbreviations of designators not listed below.

| STREET SUFFIX | ABBREVIATION |
|---------------|--------------|
| Avenue        | Ave          |
| Boulevard     | Blvd         |
| Branch        | Br           |
| Center        | Ctr          |
| County Road   | Cty Rd       |
| Court         | Ct           |
| Circle        | Cir          |
| Drive         | Dr           |
| Estate        | Est          |
| Highway       | Hwy          |
| Lane          | Ln           |
| Parkway       | Pkwy         |
| Place         | Pl           |
| Road          | Rd           |
| Route         | Rt           |
| Rural Route   | Rr           |

|         |            |
|---------|------------|
| Square  | <b>Sq</b>  |
| Station | <b>Sta</b> |
| Street  | <b>St</b>  |
| Terrace | <b>Ter</b> |
| Trail   | <b>Trl</b> |
| Way     | <b>Way</b> |

#### 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 U.S. Postal Service National Customer Support Center has a very useful web site that provides extensive address and zip code information:

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

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

[http://www.canadapost.ca/CPC2/menu\\_01.html](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 more than one city is listed for the zip code entered, you must choose the correct city from the associated list. If the city does not appear on the list and the zip code has been verified to be correct, you may enter the information for the city by typing the correct city in the city field. 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 63801, the city will default to Sikeston, but could also be the city of Minor. If requested, manually change the city to Minor following the standards below. All information is typed in upper/lower case format, i.e. not all caps or all lower. Spell out city names in their entirety. If it is necessary to abbreviate city names to fit within the 20 characters allowed by Banner, use abbreviation standards described herein or in the U.S. Postal Service Postal Addressing Standards.

Examples:

**Preferred**

West Stockbridge

Newberry Springs

**Acceptable**

W Stockbridge

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

97203-4798

### **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 country 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 Addresses**

#### **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 90777-0010

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 Alumni Foundation can put a 'preferred indicator' on any address type in the alumni module. This indicator cannot be viewed 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: MA and then TA. Admissions might typically search for a mailing address in this order: MA. Identical addresses should not be keyed in different address types.

The following table describes address types defined for Southeast Missouri State University's Banner System.

| Code | Description      | Explanation                                                                                                                               |
|------|------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| AB   | Athletic Billing | Athletic Billing Address<br>Athletic area alternate address for invoice or booster billing.<br>Updates to be done by Athletics area only. |
| AL   | Alumni Billing   | Alumni Billing Address<br>Alumni/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.                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>BI</b> | AR Billing          | Billing Address<br>Address used for person & non-person billing purposes. It must contain an address that is different than the PA or TA address for said person. These addresses are created, maintained, and deleted by Student Accounts Receivable in the Student module. (Required by Banner for sample data purposes if the Finance System is in place.)                                                                                                                                                                  |
| <b>BU</b> | Accounts Payable    | Business Address<br>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.                                                                                                                                                                    |
| <b>DM</b> | Diploma             | Diploma Mailing Address<br>Address to which a diploma will be mailed for a graduating student. This address type is created, maintained and deleted by the Registrar's Office only.                                                                                                                                                                                                                                                                                                                                            |
| <b>EE</b> | Department Location | Campus Address for SEMO Employees<br>An 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.<br><br>Approved format for EE addresses is as follows:<br>Office<br>Room Building<br>Mail Stop<br>Cape Girardeau, MO 63701 |
| <b>EM</b> | Employer            | Employer Address for non-SEMO employees<br>This address type is intended to record the work address of persons. DO NOT use this address type for SEMO employee addresses.<br><br>Approved format for EM addresses is as follows:<br>Business Name<br>Street Address<br>City, ST ZIP                                                                                                                                                                                                                                            |
| <b>GR</b> | Grant               | Grant Billing Address<br>Used by the Grants Accounting Office in the Finance                                                                                                                                                                                                                                                                                                                                                                                                                                                   |

|             |                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-------------|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|             |                      | Division.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>I2</b>   | I20                  | I-20 Address<br>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.               |
| <b>MA</b>   | Permanent            | Permanent Mailing Address<br>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.<br>(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.) |
| <b>PA</b>   | Parent               | Address of Parent of a Student<br>This address type is created, maintained, and deleted by Office of Registrar.                                                                                                                                                                                                                                                                                                                                                                             |
| <b>PF</b>   | Parent Father        | Address of Father of a Student. Use only if parents are separated/divorced/widowed.<br>This address type is created, maintained, and deleted by Office of Registrar.                                                                                                                                                                                                                                                                                                                        |
| <b>PM</b>   | Parent Mother        | Address of Mother of a Student. Use only if parents are separated/divorced/widowed<br>This address type is created, maintained, and deleted by Office of Registrar.                                                                                                                                                                                                                                                                                                                         |
| <b>RDED</b> | Research, dead end   | Research/dead end                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>RH</b>   | Residence            | Residence Hall Address<br>This is a student on-campus housing address created, maintained, and deleted by Residence Life.                                                                                                                                                                                                                                                                                                                                                                   |
| <b>RMFD</b> | Returned, forwarding | Returned mail/forwarding                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>RMMV</b> | Returned, moved      | Returned mail/moved                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>RSCH</b> | Research, current    | Research/current                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>RSFC</b> | Research, Foreign    | Research/foreign country                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>SL</b>   | Seasonal             | Seasonal Mailing Address<br>Maintained by the Alumni Office for the purpose of tracking multiple residences that are not occupied on a year round basis. Primary address should be coded MA and secondary address(es) should be SL type.                                                                                                                                                                                                                                                    |
| <b>SP</b>   | Spouse               | Spouse Address.<br>This address type is created, maintained, and deleted by the                                                                                                                                                                                                                                                                                                                                                                                                             |

|           |                    |                                                                                                                                                                                                                                                                                                                                                                                                            |
|-----------|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|           |                    | Office of Registrar.                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>TA</b> | Temp               | Local Mailing Address (Off-campus)<br>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 SEMO will only have an MA address type and will not have a TA address. |
| <b>XE</b> | President's Office | Used by the President's office                                                                                                                                                                                                                                                                                                                                                                             |
| <b>XX</b> | 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.

| <b>Address Type</b> | <b>Description</b>                         | <b>Owner</b>                                                                                             |
|---------------------|--------------------------------------------|----------------------------------------------------------------------------------------------------------|
| <b>AB</b>           | Athletic Billing Address                   | Athletic                                                                                                 |
| <b>AL</b>           | Alumni Billing Address                     | Alumni                                                                                                   |
| <b>BI</b>           | AR Billing Address                         | Student Accounts Receivable                                                                              |
| <b>BU</b>           | Accounts Payable                           | Finance                                                                                                  |
| <b>DM</b>           | Diploma Mailing Address                    | Registrar                                                                                                |
| <b>EE</b>           | Department Address for Southeast Employees | Human Resources                                                                                          |
| <b>EM</b>           | Employer Address for non-SEMO Employees    | Admissions, Registrar, Alumni                                                                            |
| <b>GR</b>           | Grant Billing Address                      | Finance                                                                                                  |
| <b>I2</b>           | I-20 Address                               | Admissions, Office of International Students                                                             |
| <b>MA</b>           | Permanent Address                          | Faculty/Staff-Human Resources<br>Recruits/applications-Admissions<br>Students-Registrar<br>Donors-Alumni |
| <b>PA</b>           | Parent Address                             | Registrar                                                                                                |
| <b>PF</b>           | Father's Address                           | Registrar                                                                                                |
| <b>PM</b>           | Mother's Address                           | Registrar                                                                                                |
| <b>RH</b>           | Residence Hall Address                     | Residence Life                                                                                           |
| <b>SL</b>           | Seasonal Mailing Address                   | Alumni                                                                                                   |
| <b>SP</b>           | Spouse Mailing Address                     | Registrar                                                                                                |
| <b>TA</b>           | Local Mailing Address (Off-campus)         | Registrar                                                                                                |
| <b>XE</b>           | Used by President's Office                 | President's Office                                                                                       |
| <b>XX</b>           | Used internally by Banner                  | TBD                                                                                                      |

### 4.2.19 Address Sources

Sources of the address are shown on the STVASRC table.

| CODE | DESCRIPTION                         |
|------|-------------------------------------|
|      |                                     |
| ALDI | Alumni Directory Response           |
| APPL | Application for Admissions          |
| CERG | CE Registration Form                |
| DEVL | Reported by Development Officer     |
| FA   | Financial Aid                       |
| LGCY | Legacy                              |
| POST | Post Office                         |
| SELF | Self Reported                       |
| SKIP | Skip Trace/Collection Agency/SFS    |
| TAPE | Tapeload                            |
| TRAN | Transcript Request                  |
| RELA | Reported by Relative/Friend         |
| RESE | Research by Advancement             |
| STAF | Reported by SEMO Staff (any)        |
| TELE | Telephone, Tele Community, Telefund |
| WEB  | World Wide Web                      |

### 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

## 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 and both types are entered into STVTELE:

#### 5.2.1.1 General Telephone Types

##### GENERAL TELEPHONE TYPES

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

#### 5.2.1.2 Address Telephone Type

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   | Athletic Billing Address Telephone Type   | Telephone number associated with an Athletic Billing Address |
| AL   | Alumni Billing Address Telephone Type     | Telephone number associated with an Alumni Billing Address   |
| BI   | Account Receivable Address Telephone Type | Telephone number associated with a billing address           |
| BU   | Accounts Payable Address Telephone Type   | Telephone number associated with a business address          |
| DM   | Diploma Mailing Address Telephone Type    | Telephone number associated with a diploma mailing address   |

|           |                                                           |                                                                           |
|-----------|-----------------------------------------------------------|---------------------------------------------------------------------------|
| <b>EE</b> | Department Address for Southeast Employees Telephone Type | Telephone number associated with a department address for a SEMO employee |
| <b>EM</b> | Employer Address for non-SEMO Employees Telephone Type    | Telephone number associated with a work address for a non-SEMO employee   |
| <b>GR</b> | Grant Billing Address Telephone Type                      | Telephone number associated with a grant billing address                  |
| <b>I2</b> | I-20 Address Telephone Type                               | Telephone number associated with an I-20 address                          |
| <b>MA</b> | Permanent Address Telephone Type                          | Telephone number associated with a permanent mailing address              |
| <b>PA</b> | Parent Address Telephone Type                             | Telephone number associated with a parent address                         |
| <b>PF</b> | Father's Address Telephone Type                           | Telephone number associated with a father's address                       |
| <b>PM</b> | Mother's Address Telephone Type                           | Telephone number associated with a mother's address                       |
| <b>RH</b> | Residence Hall Address Telephone Type                     | Telephone number associated with a resident hall address                  |
| <b>SL</b> | Seasonal Mailing Address Telephone Type                   | Telephone number associated with a seasonal mailing address               |
| <b>SP</b> | Spouse Mailing Address Telephone Type                     | Telephone number associated with a spouse's address                       |
| <b>TA</b> | Local Mailing Address (Off-campus) Telephone Type         | Telephone number associated with a local mailing address                  |
| <b>XE</b> | President's Office                                        | Telephone number associated with the President's Office                   |
| <b>XX</b> | Used internally by Banner                                 |                                                                           |

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

| <b>PHONE TYPE</b> | <b>DESCRIPTION</b>                                        | <b>OWNER</b>                  |
|-------------------|-----------------------------------------------------------|-------------------------------|
| <b>AB</b>         | Athletic Billing Address Telephone Type                   | Athletic                      |
| <b>AL</b>         | Alumni Billing Address Telephone Type                     | Alumni                        |
| <b>BI</b>         | Accounts Receivable Address Telephone Type                | Student Accounts Receivable   |
| <b>BU</b>         | Accounts Payable Address Telephone Type                   | Finance                       |
| <b>DM</b>         | Diploma Mailing Address Telephone Type                    | Registrar                     |
| <b>EE</b>         | Department Address for Southeast Employees Telephone Type | Human Resources               |
| <b>EM</b>         | Employer Address for non-SEMO Employees Telephone Type    | Admissions, Registrar, Alumni |
| <b>GR</b>         | Grant Billing Address Telephone Type                      | Finance                       |

|           |                                                   |                                                                                                          |
|-----------|---------------------------------------------------|----------------------------------------------------------------------------------------------------------|
| <b>I2</b> | I-20 Address Telephone Type                       | Admissions, Office of International Students                                                             |
| <b>MA</b> | Permanent Address Telephone Type                  | Faculty/Staff-Human Resources<br>Recruits/applications-Admissions<br>Students-Registrar<br>Donors-Alumni |
| <b>PA</b> | Parent Address Telephone Type                     | Registrar                                                                                                |
| <b>PF</b> | Father's Address Telephone Type                   | Registrar                                                                                                |
| <b>PM</b> | Mother's Address Telephone Type                   | Registrar                                                                                                |
| <b>RH</b> | Residence Hall Address Telephone Type             | Residence Life                                                                                           |
| <b>SL</b> | Seasonal Mailing Address Telephone Type           | Alumni                                                                                                   |
| <b>SP</b> | Spouse Mailing Address Telephone Type             | Registrar                                                                                                |
| <b>TA</b> | Local Mailing Address (Off-campus) Telephone Type | Registrar                                                                                                |
| <b>XE</b> | Used by the President's Office                    | President's Office                                                                                       |
| <b>XX</b> | 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 (573) 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: 3341756

#### 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: 5961, 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<br>(Saipan, Rota, and Tinian) | 671 |
| Puerto Rico                                             | 787 |
| St. Ktts/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 data entry, 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 labels. Telephone numbers must be changed on the SPATELE form, not the SPAIDEN form.

### 5.4 Standard Change Record

## 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                     |
|-------------|---------------------------------|
| <b>BUSN</b> | Business Email Address          |
| <b>PARN</b> | Parent's Email Address          |
| <b>PERS</b> | Personal Email Address          |
| <b>PRNF</b> | Parent (Father's) Email Address |
| <b>PRNM</b> | Parent (Mother's) Email Address |

|             |                               |
|-------------|-------------------------------|
| <b>SKEY</b> | SEMO Email Address            |
| <b>WORK</b> | Work -Not SEMO- Email Address |

### **6.3 Guidelines**

Only Southeast (soon to be Southeast Keys for Students, Faculty, and Staff) email addresses are to be maintained as SKEY email addresses.

When adding a subsequent email address of the same type, the prior email address should be end dated, the inactive box checked, 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**

## **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 5<sup>th</sup> 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-MAR-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 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

# 9 Social Security Number (SSN)

## 9.1 General

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

SEMO'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 Southeast Missouri State 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 his/her 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 SEMO employee, make the change then send a notification with the correct number to the Payroll Office.

Faculty and staff will direct social security number change requests to Human Resources. Students will direct social security number change requests to the Registrar's Office. Faculty/staff who are also students must direct their requests to the Human Resources area. Donors should direct their request to the Alumni Office.

## **9.4 Standard Change Record**

# **10 Date of Birth**

## **10.1 General**

A date of birth is required for all SEMO employees and students and is optional for 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 MM/DD/CCYY format. 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

Faculty and staff will direct date of birth change requests to Human Resources. Students will direct date of birth change requests to the Registrar's Office. Faculty/staff who are also students must direct their requests to the Human Resources area. Donors should direct their request to the Alumni Office.

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 SEMO students applying for financial aid, SEMO 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                     |
| P    | Partner       | Not married but considered a partner |
| M    | Married       | Legally Married                      |
| L    | Separated     | Legally married, but separated       |
| S    | Single        | Single, no known dependents          |
| U    | Unknown       | Marital status is unknown            |
| W    | Widowed       | Widowed, and not remarried           |
| K    | Single w/ dep | Single, with dependents              |

### 11.3 Guidelines

Changes to a marital status:

Faculty and staff will direct marital status change requests to Human Resources. Students will direct marital status change requests to the Registrar's Office. Faculty/staff who are also students must direct their requests to the Human Resources area. Donors should direct their request to the Alumni Office.

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

## 12 Ethnic Codes

### 12.1 General

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

### 12.2 Standards

| <b>ETHNIC CODE</b> | <b>DESCRIPTION</b>             |
|--------------------|--------------------------------|
| <b>01</b>          | American Indian/Alaskan Native |
| <b>02</b>          | Asian/Pacific Islander         |
| <b>03</b>          | Black, Non-Hispanic            |
| <b>04</b>          | Hispanic                       |
| <b>05</b>          | White, Non-Hispanic            |
| <b>06</b>          | Not Reported                   |

### 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—because they have a field for them elsewhere).

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

| <b>BANNER APPLICATION</b> | <b>CONTACT PERSON</b> | <b>Code as Deceased</b>           |
|---------------------------|-----------------------|-----------------------------------|
| <b>Human Resources</b>    | Assistant Director    | Current & Retired faculty & staff |
| <b>Student</b>            | Registrar             | Students, except Alumni           |
| <b>Financial Aid</b>      | Director              |                                   |
| <b>Finance</b>            | Manager of Accounts   |                                   |



|                               |                                   |                    |
|-------------------------------|-----------------------------------|--------------------|
|                               | Payable                           |                    |
| <b>Alumni and Development</b> | Systems Manager                   | Alumni             |
| <b>Admissions</b>             | Associate Director for Operations | Recruits/Prospects |
| <b>A/R</b>                    | Director                          |                    |

## 13.4 Standard Change Record

## 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 |
| EdD      | Doctor of Education           |
| 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 SEMO. Additional information, such as country or 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        | SEMO faculty and staff                                                                                                    |
| International Programs | Persons applying as students                                                                                              |
| International Programs | Students after they enroll. Also tracks information on certain non-citizens in the area who are not associated with SEMO. |
| Alumni                 | Donors who are not SEMO 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:

| <b>Banner Code</b> | <b>Description</b>                                                                      |
|--------------------|-----------------------------------------------------------------------------------------|
| 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) |
| R                  | Resident Alien                                                                          |
| Blank              | Unknown                                                                                 |

Citizenship is used in IPEDS reporting for Institutional Research.

### **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 and maintained by the International Program.

## **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 an 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 faculty and staff of SEMO    |
| Registrar       | for persons applying as students |
| Registrar       | 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 file is entered initially by the Registrar's office and updated as necessary by the Office of the Registrar.

### **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                  | 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**

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

## **18.1 General**

This standard directs how particular/special legacy information will be handled in the Banner system.

## **18.2 Standards**

### **18.2.1 Standards Admissions Application**

The application for admission used by the Office of Admissions asks if the applicant's parents are SEMO alumni and what year they graduated.

### 18.2.2 Changes made to General Person on Banner & Legacy

| <b>Request made to:</b> | <b>Action Required:</b>                                                                                                                                                                                                                                                                                                                                    | <b>Look-up Person</b>                                                                                                                                              |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Student/ADM             | <ol style="list-style-type: none"> <li>1. Make Legacy entry</li> <li>2. Look-up on Production and if listed...</li> <li>3. Notify Alumni to make necessary changes in Banner until Student has full Production access</li> </ol>                                                                                                                           | <p>Stu: Sandy Hinkle, Theresa Rosener, Amy Trock</p> <p>Adm: No Need</p>                                                                                           |
| Alumni                  | <ol style="list-style-type: none"> <li>1. Entry made in Banner</li> <li>2.</li> </ol>                                                                                                                                                                                                                                                                      |                                                                                                                                                                    |
| HR                      | <ol style="list-style-type: none"> <li>1. Make Legacy entry</li> <li>2. Look-up on Production and if listed...</li> <li>3. Notify Alumni to make necessary changes in Banner until HR has full Production access</li> </ol>                                                                                                                                | <p>Carmen McNeely<br/>Pam Ladreiter</p>                                                                                                                            |
| Finance                 | <ol style="list-style-type: none"> <li>1. Make Legacy entry</li> <li>2. Look-up on Production and if listed...</li> <li>3. Notify Alumni to make necessary changes in Banner until Finance has full Production access</li> </ol>                                                                                                                           | Not needed                                                                                                                                                         |
| FA/AR                   | <ol style="list-style-type: none"> <li>1. Make Legacy entry</li> <li>2. Look-up on Production and if listed...</li> <li>3. Notify Alumni to make necessary changes in Banner until Finance has full Production access, at which time will notify Finance to make necessary changes in Banner until Financial Aid/AR has full Production access.</li> </ol> | <p>FA: Karen Walker/Linda Buerck/Dee Dee Stevens</p> <p>AR: Verona Lambert/ Ellen Farrow/Darcy Rigdon /Melissa Stevenson/Lisa Orso/Barbra Garner/ARStu1/ARStu2</p> |

## **18.3 Guidelines**

### **18.3.1 Guidelines for Admissions Application**

Applicant information of parental alumni status will be stored in Banner and shared with the SEMO alumni office.

### **18.3.2 Guidelines for Changes Made to General Person on Legacy**

Need to designate at least one person per area to have look-up access for General Person/Non-person records.

## **18.4 Standard Change Record**

## **19 Religion Codes**

### **19.1 General**

The University will not maintain religious data in the Banner System.

### **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 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 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

According to FERPA, if a student completes a 'Request for Confidential Information' form and submits it to the Registrar's office, the student's directory information WILL NOT be disclosed to the public. The Registrar's office 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, the request should be submitted to the Foundation 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                    |
| 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 and/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 SEMO Access to Student Records policy, "Directory Information" for enrolled students is eligible for release unless the student requests that it be held confidential. Southeast Missouri State 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 athletics, dates of attendance, degrees and awards received, hours of current enrollment, 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. Southeast Missouri State University reserves the right to make directory information public unless the student has filed a "Request for Confidential Information" form with the Office of Registrar.

### **21.3.4 Directory Exclusion**

If a student completes a "Directory Exclusion" request form and submits it to the Office of Registrar, their name, address, and phone number WILL NOT be included in the annual SEMO

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:

|        |                            |
|--------|----------------------------|
| ADM    | Office of Admissions       |
| ADV    | Advancement                |
| FA     | Office of Financial Aid    |
| FN     | Finance Budget             |
| HR     | Human Resources            |
| PY     | Payroll                    |
| REG    | Office of Registrar        |
| AR     | Student Financial Services |
| EX_OFC | Executive Offices          |

### **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 call 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:

|    |                               |
|----|-------------------------------|
| FN | Finance – Accounting Services |
| AD | Office of Admissions          |
| AV | Advancement                   |
| AR | Student Financial Services    |
| HR | Human Resources               |
| PY | Payroll                       |
| RG | Office of Registrar           |
| FA | Student Financial Services    |

### 23.3 Guidelines

### 23.4 Standard Change Record

## 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 Southeast Missouri State 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 Functional 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 OCTOBER, 2004

| Team Member           | Banner Module Represented |
|-----------------------|---------------------------|
| Martha Henckell, Team | Information Technology    |

|                |                    |
|----------------|--------------------|
| Leader         |                    |
| Jane Ogles     | Alumni/Advancement |
| Karen Walker   | Financial Aid      |
| Kathy Mangels  | Finance            |
| Jim Cook       | Human Resources    |
| Sandy Hinkle   | Student            |
| Pat Ryan       | IRTL               |
| Verona Lambert | AR                 |
| Debbie Below   | Admissions         |

**24.1 Data Standards Change Request Form**

SUBMITTED BY:  
DATE:

FUNCTIONAL TEAM:

REQUESTED CHANGE:

JUSTIFICATION:

OTHER MODULE(S) AFFECTED:

- |                                          |                                  |                                        |
|------------------------------------------|----------------------------------|----------------------------------------|
| <input type="checkbox"/> Advancement     | <input type="checkbox"/> Finance | <input type="checkbox"/> Financial Aid |
| <input type="checkbox"/> Human Resources | <input type="checkbox"/> Student | <input type="checkbox"/> Other: _____  |

HOW ARE THEY AFFECTED?

WHO WILL BE THE SETWARD FOR THIS DATA?

WHO WILL MAINTAIN THIS DATA?

SUPPORT FOR CHANGE:

DATA STANDARDS TEAM MEMBER:

Accepted by: \_\_\_\_\_

Date: \_\_\_\_\_

Name printed: \_\_\_\_\_

.....  
DATA STANDARDS TEAM RESOLUTION:

- |                                                     |                                          |
|-----------------------------------------------------|------------------------------------------|
| <input type="checkbox"/> Change Accepted            | <input type="checkbox"/> Change Rejected |
| <input type="checkbox"/> Further Information Needed |                                          |

EXPLANATION:

## 25 APPENDIX B: Shared Tables in Banner as of September 2004

This appendix contains four tables:

- TABLE 1: Shared Data Tables
- TABLE 2: Shared Validation Tables
- TABLE 3: Data Stewards for Shared Validation Tables
- TABLE 4: Shared Data Items

**Table 1: Shared Data Tables**

| Tables         | Description          | Student | Financial Aid | Alumni | Finance | Human Resources |
|----------------|----------------------|---------|---------------|--------|---------|-----------------|
| <b>SPRIDEN</b> | Identification Table | X       | X             | X      | X       | X               |
| <b>SPRADDR</b> | Address              | X       | X             | X      | X       | X               |
| <b>SPBPERS</b> | Person Information   | X       | X             | X      | X       | X               |
| <b>SPRTELE</b> | Telephone            | X       | X             | X      | X       | X               |
| <b>GOREMAL</b> | Email                | X       | X             | X      | X       | X               |

**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 leader.

| Tables         | Description        | Student | Financial Aid | Alumni | Finance | Human Resources |
|----------------|--------------------|---------|---------------|--------|---------|-----------------|
| <b>FTVACCI</b> | Account Index Code |         |               | X      | XS      | X               |
| <b>FTVACCT</b> | Account Code       |         |               | X      | XS      | X               |
| <b>FTVACTV</b> | Activity Code      |         |               | X      | XS      | X               |
| <b>FTVCOAS</b> | Chart of Account   |         |               | X      | XS      | X               |
| <b>FTVFUND</b> | Fund Code          |         |               | X      | XS      | X               |
| <b>FTVLOCN</b> | Location Code      |         |               | X      | XS      | X               |
| <b>FTVOBUD</b> | Budget 10 & Phase  |         |               |        | XS      | X               |
| <b>FTVORGN</b> | Organization Code  |         | X             | X      | XS      | X               |
| <b>FTVPROG</b> | Program Code       |         |               | X      | XS      | X               |
|                |                    |         |               |        |         |                 |
| <b>GTVEMAL</b> | Email Type         | XS      | X             | X      |         |                 |
| <b>GTVEXPN</b> | Expenses           | X       | XS            | X      |         |                 |
| <b>GTVMAIL</b> | Mail Type          | X       | X             | XS     |         |                 |
| <b>GTVNTYP</b> | Name Type          | X       | X             | XS     |         |                 |

|                |                               |           |          |           |           |           |
|----------------|-------------------------------|-----------|----------|-----------|-----------|-----------|
| <b>GTVSCOD</b> | EDI/ISO Standard Code         | <b>XS</b> | <b>X</b> | <b>X</b>  | <b>X</b>  | <b>X</b>  |
| <b>GTVSUBJ</b> | Subject Index                 | <b>X</b>  | <b>X</b> | <b>XS</b> |           |           |
| <b>GTVZIPC</b> | ZIP/Postal Code               | <b>X</b>  | <b>X</b> | <b>X</b>  | <b>X</b>  | <b>X</b>  |
| <b>GXRBank</b> | Bank Code Rule Form           |           |          |           | <b>XS</b> | <b>X</b>  |
| <b>GXVDIRD</b> | Bank Routing Number           |           |          |           | <b>XS</b> | <b>X</b>  |
|                |                               |           |          |           |           |           |
| <b>SOATBRK</b> | Student Term Break Form       | <b>XS</b> | <b>X</b> |           |           |           |
| <b>STVACCG</b> | Activity Category             | <b>X</b>  | <b>X</b> | <b>XS</b> |           | <b>X</b>  |
| <b>STVACTC</b> | Activity Code                 | <b>X</b>  |          | <b>XS</b> |           |           |
| <b>STVACTP</b> | Activity Type                 | <b>X</b>  |          | <b>XS</b> |           |           |
| <b>STVACYR</b> | Academic Year Code            | <b>XS</b> | <b>X</b> |           |           |           |
| <b>STVADMT</b> | Admission Type                | <b>XS</b> | <b>X</b> |           |           |           |
| <b>STVAPDC</b> | Admissions App Decision Codes | <b>XS</b> | <b>X</b> |           |           |           |
| <b>STVAPST</b> | Admission Application Status  | <b>XS</b> | <b>X</b> |           |           |           |
| <b>STVASCD</b> | Room Assignment Status        | <b>XS</b> | <b>X</b> |           |           |           |
| <b>STVASRC</b> | Address Source                | <b>XS</b> |          | <b>X</b>  | <b>X</b>  |           |
| <b>STVASTD</b> | Academic Standing             | <b>XS</b> | <b>X</b> |           |           |           |
| <b>STVATYP</b> | Address Type Code             | <b>XS</b> | <b>X</b> | <b>X</b>  | <b>X</b>  | <b>X</b>  |
| <b>STVBLDG</b> | Building                      | <b>XS</b> | <b>X</b> | <b>X</b>  |           |           |
| <b>STVCAMP</b> | Campus Code                   | <b>XS</b> | <b>X</b> | <b>X</b>  |           |           |
| <b>STVCIPC</b> | CIPC Code                     | <b>XS</b> |          |           |           | <b>X</b>  |
| <b>STVCITZ</b> | Citizen Type Code             | <b>XS</b> | <b>X</b> | <b>X</b>  |           | <b>X</b>  |
| <b>STVCLAS</b> | Class Code                    | <b>XS</b> | <b>X</b> |           |           |           |
| <b>STVCNTY</b> | County Code                   | <b>XS</b> | <b>X</b> | <b>X</b>  | <b>X</b>  | <b>X</b>  |
| <b>STVCOLL</b> | College Code                  | <b>XS</b> | <b>X</b> | <b>X</b>  |           | <b>X</b>  |
| <b>STVCOMT</b> | Committee/Service Type        | <b>X</b>  |          |           |           | <b>X</b>  |
| <b>STVCTYP</b> | Contact Type                  | <b>XS</b> | <b>X</b> |           |           |           |
| <b>STVDAYS</b> | Days of the Week              | <b>XS</b> | <b>X</b> |           |           | <b>X</b>  |
| <b>STVDEGC</b> | Degree Code                   | <b>XS</b> | <b>X</b> | <b>X</b>  |           | <b>X</b>  |
| <b>STVDEGS</b> | Degree Status                 | <b>XS</b> | <b>X</b> |           |           |           |
| <b>STVDEPT</b> | Department Code               | <b>XS</b> |          | <b>X</b>  |           |           |
| <b>STVDIVS</b> | Division                      | <b>X</b>  | <b>X</b> |           |           | <b>XS</b> |
| <b>STVDLEV</b> | Degree Level                  | <b>XS</b> |          |           |           | <b>X</b>  |
| <b>STVDPLM</b> | Diploma Type                  | <b>XS</b> | <b>X</b> |           |           |           |
| <b>STVEMPT</b> | Employment Type               | <b>XS</b> | <b>X</b> |           |           |           |
| <b>STVESTS</b> | Enrollment Status             | <b>XS</b> | <b>X</b> |           |           |           |



|                |                                    |           |          |           |          |           |
|----------------|------------------------------------|-----------|----------|-----------|----------|-----------|
| <b>STVETHN</b> | Ethnic Code                        | <b>XS</b> | <b>X</b> | <b>X</b>  |          | <b>X</b>  |
| <b>STVETYP</b> | Event Type                         | <b>X</b>  |          | <b>XS</b> |          |           |
| <b>STVGEOD</b> | Geographic Region<br>Division      | <b>XS</b> |          | <b>X</b>  |          |           |
| <b>STVGEOR</b> | Geographic Region<br>Code          | <b>XS</b> |          | <b>X</b>  |          |           |
| <b>STVGMOD</b> | Grading Mode<br>Code               | <b>XS</b> | <b>X</b> |           |          |           |
| <b>STVHAPS</b> | Housing<br>Application Status      | <b>XS</b> | <b>X</b> |           |          |           |
| <b>STVHLDD</b> | Hold Type                          | <b>XS</b> | <b>X</b> |           |          |           |
| <b>STVHOND</b> | Departmental<br>Honors Code        | <b>XS</b> | <b>X</b> | <b>X</b>  |          | <b>X</b>  |
| <b>STVHONR</b> | Institutional Honors<br>Code       | <b>XS</b> |          | <b>X</b>  |          |           |
| <b>STVINIT</b> | Initials Code                      | <b>XS</b> |          | <b>X</b>  |          |           |
| <b>STVLANG</b> | Language                           | <b>XS</b> |          |           |          | <b>X</b>  |
| <b>STVLEAD</b> | Leadership                         | <b>X</b>  |          | <b>XS</b> |          |           |
| <b>STVLEVL</b> | Level Code                         | <b>XS</b> | <b>X</b> |           |          | <b>X</b>  |
| <b>STVLGCY</b> | Legacy                             | <b>XS</b> |          | <b>X</b>  |          | <b>X</b>  |
| <b>STVMAJR</b> | Major/Minor/<br>Concentration Code | <b>XS</b> | <b>X</b> | <b>X</b>  |          | <b>X</b>  |
| <b>STVMDEQ</b> | Medical Equipment<br>Code          | <b>X</b>  |          |           |          | <b>X</b>  |
| <b>STVMEDI</b> | Medical Code                       | <b>X</b>  |          |           |          | <b>X</b>  |
| <b>STVMRCD</b> | Meal Rate                          | <b>XS</b> | <b>X</b> |           |          |           |
| <b>STVMRTL</b> | Martial Status Code                | <b>X</b>  | <b>X</b> | <b>X</b>  |          | <b>XS</b> |
| <b>STVMSCD</b> | Meal Assignment<br>Status          | <b>XS</b> | <b>X</b> |           |          |           |
| <b>STVNATN</b> | Nation Code                        | <b>XS</b> | <b>X</b> | <b>X</b>  | <b>X</b> | <b>X</b>  |
| <b>STVORIG</b> | Originator Code                    | <b>X</b>  |          | <b>X</b>  |          |           |
| <b>STVPENT</b> | Port of Entry Code                 | <b>XS</b> |          |           |          | <b>X</b>  |
| <b>STVRATE</b> | Student Fee<br>Assessment Code     | <b>XS</b> | <b>X</b> |           |          |           |
| <b>STVRDEF</b> | Building/Room<br>Attribute         | <b>XS</b> | <b>X</b> |           |          |           |
| <b>STVRELG</b> | Religion Code                      | <b>XS</b> |          | <b>X</b>  |          | <b>X</b>  |
| <b>STVRELT</b> | Relation Code                      | <b>X</b>  |          |           |          | <b>XS</b> |
| <b>STVRMST</b> | Room Status                        | <b>XS</b> | <b>X</b> |           |          |           |
| <b>STVRRCD</b> | Room Rate                          | <b>XS</b> | <b>X</b> |           |          |           |
| <b>STVRSTS</b> | Course Registration<br>Status      | <b>XS</b> | <b>X</b> |           |          |           |
| <b>STVSBGI</b> | Source/Background<br>Institution   | <b>XS</b> | <b>X</b> | <b>X</b>  |          | <b>X</b>  |
| <b>STVSITE</b> | Site                               | <b>XS</b> | <b>X</b> |           |          |           |

|                 |                                 |           |          |          |           |          |
|-----------------|---------------------------------|-----------|----------|----------|-----------|----------|
| <b>STVSPON</b>  | International Student Sponsor   | <b>XS</b> | <b>X</b> |          |           |          |
| <b>STVSTAT</b>  | State/Province Code             | <b>XS</b> | <b>X</b> | <b>X</b> | <b>X</b>  | <b>X</b> |
| <b>STVSTST</b>  | Student Status                  | <b>XS</b> | <b>X</b> |          |           |          |
| <b>STVTADM</b>  | Test Score Administration Type  | <b>XS</b> | <b>X</b> |          |           |          |
| <b>STVTELE</b>  | Telephone Type                  | <b>XS</b> | <b>X</b> | <b>X</b> | <b>X</b>  | <b>X</b> |
| <b>STVTEPR</b>  | Test Purpose                    | <b>XS</b> | <b>X</b> |          |           |          |
| <b>STVTERM</b>  | Term Type                       | <b>XS</b> | <b>X</b> |          |           |          |
| <b>STVTESC</b>  | Test Code                       | <b>XS</b> | <b>X</b> |          |           |          |
| <b>STVTSRC</b>  | Admission Test Score Source     | <b>XS</b> | <b>X</b> |          |           |          |
| <b>STVVETC</b>  | Veteran Type                    | <b>XS</b> | <b>X</b> |          |           |          |
| <b>STVVITYP</b> | VISA Type                       | <b>XS</b> |          |          |           | <b>X</b> |
| <b>STVWDRL</b>  | Student Withdrawal Status       | <b>XS</b> | <b>X</b> |          |           |          |
|                 |                                 |           |          |          |           |          |
| <b>TSACONT</b>  | Contract Authorization Form     | <b>XS</b> | <b>X</b> |          |           |          |
| <b>TSADETC</b>  | Detail Code Control Form        | <b>XS</b> | <b>X</b> |          |           |          |
| <b>TSAEXPT</b>  | Exemption Authorization Form    | <b>XS</b> | <b>X</b> |          |           |          |
| <b>TVVAUTH</b>  | Authorization Validation Form   | <b>XS</b> | <b>X</b> |          |           |          |
| <b>TTVBILL</b>  | Billing Code                    | <b>XS</b> | <b>X</b> |          |           |          |
| <b>TTVDCAT</b>  | Detail Category                 | <b>XS</b> | <b>X</b> |          |           |          |
| <b>TTVPAYT</b>  | Payment Type                    | <b>XS</b> | <b>X</b> |          |           |          |
| <b>TTVSRCE</b>  | Charge/Payment Detail Source    | <b>XS</b> | <b>X</b> |          |           |          |
|                 |                                 |           |          |          |           |          |
| <b>GURAPAY</b>  | Accounting Feed AP Table        | <b>X</b>  |          |          | <b>XS</b> | <b>X</b> |
| <b>GURFEED</b>  | Finance Transaction Input Table | <b>X</b>  |          |          | <b>XS</b> | <b>X</b> |

## 26 APPENDIX C: Duplicate PIDMS

Until identified persons with multiple PIDMs on Banner have their records merged, it is necessary to identify the IDs that will need to be deleted so additional information is not attached, creating even more work.

- Step 1: End user will notify functional leader of the module used when duplicate was discovered.
- Step 2: Duplication will be verified by the functional leader that has been notified
- Step 3: Information Technology will be notified of all duplicate ID numbers involved by the functional area office.
- Step 4: Information Technology will identify the ID that will be kept based on the number and type of tables associated with all duplicates involved.
- Step 5: Information Technology will mark the ID(s) to be deleted by changing the ID number. This will prevent any new data being added to the ID that will be deleted.
- Step 6: Information Technology will notify the involved functional areas with table names of which they are responsible for moving to the permanent ID.
- Step 7: Functional areas will notify Information Technology when Step 6 is complete.
- Step 8: Information Technology will once again run the script to insure all tables have been moved. Step 6 – 8 will continue until all data has been merged into one ID.

Any other IDs under a different PIDM for the same person will be changed to a nine-character format where the first character is an 'X' followed by the last 8 digits **of the ID number to be used**.

Example: Duplicate records exist under 'S01011234' and 'S01013456.'

ID S01011234 is the ID to be **used**

ID S01013456 is the ID to be **not used**

ID S01013456 is to be changed to X01011234

If a person has two or more duplicate records, the second position of the 'X' ID will be an alpha character beginning with the letter 'A.' **All IDs beginning with X will be merged with the used "S" ID.**

Example: Duplicate records exist under 'S01011234,' 'S01013456,' 'S01016789,' and 'S01024567.'

ID S01013456 is the ID to be **used**

ID S01011234, S01016789, and S01024567 are the IDs to be **not used**

ID S01011234 is to be changed to X01013456

ID S01016789 is to be changed to XA1013456

ID S01024567 is to be changed to XB1013456

**Note 1:** Any new data should be added to the ID being used.

**Note 2:** All data for this person that has not yet been merged to the ID being used will appear under the 'X' ID.