

UNIVERSITY *of*  
NORTHERN COLORADO



**BANNER**  
**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. The Data Standards Committee must approve any changes recommended for the data standards in use at the University of Northern Colorado.

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## **SUMMARY of REQUIREMENTS for CREATING and MAINTAINING ACCURATE RECORDS**

- **NEVER SHARE YOUR PASSWORD:** Data integrity begins with control over access to the database. Your user ID and password creates your identify within the Banner system. Protecting your password safeguards the validity of the data held in the system and the personal information of students and staff. It also protects your identity from being misused within the system by someone else.
- **SEARCH FIRST:** Before you create a new record for any entity (“Person” or “Non-Person), please make sure that the entity has not already been entered in the Banner database. **Each user must conduct a thorough search to prevent entering a duplicate and/or multiple record.** Duplicate and/or multiple records create problems in many parts of the system and may take many hours of staff time to locate and remove.
- **NEVER USE:** In **creating** a record, **never use** the pound sign (#) or the percent sign (%). The pound sign can cause Banner database errors and the percent sign has a special use within the search functions of the system.
- **ABBREVIATIONS:** There are specific ways to abbreviate words that are shown in this document and in Appendix C. Please use only these approved forms when entering data.
- **PUNCTUATION: Do not add punctuation where there is none.** For “Person”names, use hyphens, apostrophes or dashes exactly as the person indicates in writing. Do not use commas or periods in any name field. Do not use punctuation in abbreviations, prefixes or suffixes such as Dr, PhD or Jr. Punctuation for address fields should only be used if specifically required for the address number and should be limited to periods, slashes and hyphens.
- **DATA CHANGES:** Please do not make any data changes **unless** you have the appropriate responsibility and authority. When you do make changes, please follow the procedures established by the Data Steward of the data you want to change.
- **REMEMBER:** Many data fields have specific data entry rules. These specific rules are outlined in this manual and should be carefully followed.

**“PERSON” (Student, Employee and/or Vendor) - Data Standards Quick Reference**

<p><b>Before creating a Person...</b> Search on GUIALTI or GOAMTCH using ID, SSN, Last Name, and First Name with % before and after each search string.</p>	<p style="text-align: center;"><b>Address Abbreviations</b></p> <table border="1"> <thead> <tr> <th colspan="2">Street Suffixes</th> <th colspan="2">Unit Designators</th> </tr> </thead> <tbody> <tr><td>Avenue</td><td>Ave</td><td>Apartment</td><td>Apt</td></tr> <tr><td>Boulevard</td><td>Bld</td><td>Building</td><td>Bldg</td></tr> <tr><td>Center</td><td>Ctr</td><td>Department</td><td>Dept</td></tr> <tr><td>Circle</td><td>Cir</td><td>Floor</td><td>Fl</td></tr> <tr><td>County Rd</td><td>CR</td><td>Number</td><td>Unit</td></tr> <tr><td>Court</td><td>Ct</td><td>Room</td><td>Rm</td></tr> <tr><td>Drive</td><td>Dr</td><td>Suite</td><td>Ste</td></tr> <tr><td>Expressway</td><td>Expy</td><td>Unit</td><td>Unit</td></tr> <tr><td>Freeway</td><td>Fwy</td><td></td><td></td></tr> <tr><td>Highway</td><td>Hwy</td><td></td><td></td></tr> <tr><td>Lane</td><td>Ln</td><td colspan="2" style="text-align: center;"><b>Compass Directionals</b></td></tr> <tr><td>Parkway</td><td>Pkwy</td><td>North</td><td>N</td></tr> <tr><td>Place</td><td>Pl</td><td>South</td><td>S</td></tr> <tr><td>Point</td><td>Pt</td><td>East</td><td>E</td></tr> <tr><td>Road</td><td>Rd</td><td>West</td><td>W</td></tr> <tr><td>Route</td><td>Rt</td><td>Northeast</td><td>NE</td></tr> <tr><td>Rural Route</td><td>RR</td><td>Northwest</td><td>NW</td></tr> <tr><td>Square</td><td>Sq</td><td>Southeast</td><td>SE</td></tr> <tr><td>Street</td><td>St</td><td>Southwest</td><td>SW</td></tr> <tr><td>Trail</td><td>Trl</td><td></td><td></td></tr> <tr><td>Turnpike</td><td>Tpke</td><td></td><td></td></tr> <tr><td>W...</td><td>W...</td><td></td><td></td></tr> </tbody> </table>	Street Suffixes		Unit Designators		Avenue	Ave	Apartment	Apt	Boulevard	Bld	Building	Bldg	Center	Ctr	Department	Dept	Circle	Cir	Floor	Fl	County Rd	CR	Number	Unit	Court	Ct	Room	Rm	Drive	Dr	Suite	Ste	Expressway	Expy	Unit	Unit	Freeway	Fwy			Highway	Hwy			Lane	Ln	<b>Compass Directionals</b>		Parkway	Pkwy	North	N	Place	Pl	South	S	Point	Pt	East	E	Road	Rd	West	W	Route	Rt	Northeast	NE	Rural Route	RR	Northwest	NW	Square	Sq	Southeast	SE	Street	St	Southwest	SW	Trail	Trl			Turnpike	Tpke			W...	W...		
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<p><b>“Person” Names</b></p> <ol style="list-style-type: none"> <li>1. Enter last, first, and middle names exactly as provided, using upper and lower case and maintaining spaces. (<i>duBois, Van Buren, Van der Lage, Vander Vaart</i>)</li> <li>2. Enter hyphens, apostrophes or dashes as indicated, but do not use periods or commas. (<i>Ann/M/St John-O’Neil</i>)</li> <li>3. Do not enter special characters (&amp;, %, #, “”).</li> <li>4. If first name is indicated as initial and full middle name, enter both in <b>First Name</b> field. (<i>D Gary/blank/Smith</i>)</li> <li>5. If a person has more than two given names and does not specify first vs. middle, enter first two in <b>First Name</b>, remainder in <b>Middle Name</b>. (<i>Anne Marie/Susan/Smith</i>)</li> <li>6. If a person has only one name, enter it in <b>Last Name</b> field and leave <b>First Name</b> field blank.</li> <li>7. Enter prefixes (<i>Dr, Rev</i>) and suffixes (<i>PhD, Esq, Jr, III</i>) without punctuation, if required.</li> <li>8. If a name is longer than the field allows, enter as much as possible.</li> </ol>																																																																																													
<p><b>Street Addresses</b></p> <ol style="list-style-type: none"> <li>1. Enter data in first address line, then second, then third.</li> <li>2. Enter delivery address in last used line before <b>City</b>.</li> <li>3. Abbreviate Post Office <i>PO</i> with no space and enter by itself on last used line before <b>City</b>. (<i>PO Box 1234</i>)</li> <li>4. Do not use special characters (#, %, &amp;).</li> <li>5. Enter <i>and</i> in place of &amp;.</li> <li>6. Use the word Unit, Ste, Apt, etc. in place of #, No, or Number.</li> <li>7. Enter <i>c/o</i> in place of <i>in care of</i> in <b>Street Line 1</b>.</li> <li>8. Enter attention line in <b>Street Line 1</b>. (<i>Attn Bob Snow</i>)</li> <li>9. Enter periods, slashes, and hyphens only in street number and zip code. (<i>39.2 Rd, 101 ½ Main St, 97203-4798</i>)</li> <li>9. Use numbers for numbered streets and include <i>st,nd,rd,th</i>. (<i>201 4<sup>th</sup> St, 1919 23<sup>rd</sup> Ave, 4801 NW 101<sup>st</sup> St</i>)</li> </ol>	<ol style="list-style-type: none"> <li>10. Abbreviate street suffixes, unit designators, and directionals, if not part of primary name (<i>N South Oak</i>)</li> <li>11. If there are two street suffixes, abbreviate second; first becomes part of street name. (<i>1300 W 43<sup>rd</sup> Avenue Ct</i>)</li> <li>12. Enter unit designators after street address or on line Above.</li> <li>13. Spell out street and city names, if space allows. (<i>County Road 14, Fort Collins, Idaho Springs</i>)</li> <li>14. Allow Banner to enter <b>City</b> and <b>State</b> from <b>Zip Code</b>.</li> <li>15. <b>Campus address</b> is to be used for <b>Employees ONLY</b> Enter “Home” Department in <b>Street Line 1</b>, Building and Room Number in <b>Street Line 2</b>, Campus Box in <b>Street Line 3</b>, and Greeley in <b>City</b>.</li> </ol>																																																																																												
<p><b>Telephone Numbers</b></p> <ol style="list-style-type: none"> <li>1. <b>Enter telephone numbers if provided. Do not use any punctuation (such as hyphens).</b></li> <li>2. The telephone number entry is divided into three fields. The <u>first field</u> is for area code entry, the <u>second field</u> should include all seven digits of the phone number (without a hyphen), the <u>third field</u> is reserved for the extension number.</li> <li>3. <i>Only numeric values should be entered in any of the three fields, NO ALPHA CHARACTERS.</i></li> <li>4. All regional and local telephone numbers, including On Campus telephone types, are entered using the ten-digit format.</li> <li>5. Set the <i>Primary</i> indicator if the telephone number is the primary contact for the entity</li> <li>6. Set the <i>Unlisted</i> indicator if the telephone number should be designated as ‘unlisted.’</li> <li>7. Set the <i>Inactive</i> indicator if the telephone number is no longer valid.</li> </ol>	<p><b>Telephone Types</b></p> <table border="1"> <tbody> <tr><td>Business</td><td>BU</td></tr> <tr><td>Campus</td><td>CAMP</td></tr> <tr><td>Cell Phone</td><td>CELL</td></tr> <tr><td>Emergency</td><td>EMER</td></tr> <tr><td>Fax</td><td>FAX</td></tr> <tr><td>Home</td><td>HOME</td></tr> <tr><td>Permanent</td><td>PR</td></tr> <tr><td>Pager</td><td>PAGE</td></tr> <tr><td>Third Party</td><td>TP</td></tr> <tr><td>Toll Free</td><td>TOLL</td></tr> </tbody> </table>	Business	BU	Campus	CAMP	Cell Phone	CELL	Emergency	EMER	Fax	FAX	Home	HOME	Permanent	PR	Pager	PAGE	Third Party	TP	Toll Free	TOLL																																																																								
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<p><b>Foreign Addresses</b></p> <ol style="list-style-type: none"> <li>1. Enter as provided including punctuation, except commas.</li> <li>2. Do not abbreviate spelled-out words, if space allows.</li> <li>3. Enter non-Canadian state/province in <b>Street Line 3</b>.</li> <li>4. For Canadian addresses, enter Province in <b>State or Province Code</b>.</li> <li>5. The <b>County Code</b> field should be left blank.</li> <li>6. Enter postal code (with spaces) in <b>Postal Code</b>.</li> <li>7. Enter country name from validation table in <b>Nation Code</b>.</li> </ol>																																																																																													

**“NON-PERSON” (Vendor) - Data Standards Quick Reference**

<p><b>Before creating a “Non-Person” Vendor...</b></p> <p>Search on GUIAI.TI or GOAMTCH using ID, TIN, Name, and</p>	<p style="text-align: center;"><b>Address Abbreviations</b></p> <table border="0"> <tr> <th colspan="2">Street Suffixes</th> <th colspan="2">Unit Designators</th> </tr> <tr> <td>Avenue</td><td>Ave</td> <td>Apartment</td><td>Apt</td> </tr> <tr> <td>Boulevard</td><td>Blvd</td> <td>Building</td><td>Bldg</td> </tr> <tr> <td>Center</td><td>Ctr</td> <td>Department</td><td>Dept</td> </tr> <tr> <td>Circle</td><td>Cir</td> <td>Floor</td><td>Fl</td> </tr> <tr> <td>County Rd</td><td>CR</td> <td>Number</td><td>Unit</td> </tr> <tr> <td>Court</td><td>Ct</td> <td>Room</td><td>Rm</td> </tr> <tr> <td>Drive</td><td>Dr</td> <td>Suite</td><td>Ste</td> </tr> <tr> <td>Expressway</td><td>Expy</td> <td>Unit</td><td>Unit</td> </tr> <tr> <td>Freeway</td><td>Fwy</td> <td></td><td></td> </tr> <tr> <td>Highway</td><td>Hwy</td> <th colspan="2">Compass Directionals</th> </tr> <tr> <td>Lane</td><td>Ln</td> <td>North</td><td>N</td> </tr> <tr> <td>Parkway</td><td>Pkwy</td> <td>South</td><td>S</td> </tr> <tr> <td>Place</td><td>Pl</td> <td>East</td><td>E</td> </tr> <tr> <td>Point</td><td>Pt</td> <td>West</td><td>W</td> </tr> <tr> <td>Road</td><td>Rd</td> <td>Northeast</td><td>NE</td> </tr> <tr> <td>Route</td><td>Rt</td> <td>Northwest</td><td>NW</td> </tr> <tr> <td>Rural Route</td><td>RR</td> <td>Southeast</td><td>SE</td> </tr> <tr> <td>Square</td><td>Sq</td> <td>Southwest</td><td>SW</td> </tr> <tr> <td>Street</td><td>St</td> <td></td><td></td> </tr> <tr> <td>Trail</td><td>Trl</td> <td></td><td></td> </tr> <tr> <td>Turnpike</td><td>Tpke</td> <td></td><td></td> </tr> <tr> <td>Wav</td><td>Wav</td> <td></td><td></td> </tr> </table>	Street Suffixes		Unit Designators		Avenue	Ave	Apartment	Apt	Boulevard	Blvd	Building	Bldg	Center	Ctr	Department	Dept	Circle	Cir	Floor	Fl	County Rd	CR	Number	Unit	Court	Ct	Room	Rm	Drive	Dr	Suite	Ste	Expressway	Expy	Unit	Unit	Freeway	Fwy			Highway	Hwy	Compass Directionals		Lane	Ln	North	N	Parkway	Pkwy	South	S	Place	Pl	East	E	Point	Pt	West	W	Road	Rd	Northeast	NE	Route	Rt	Northwest	NW	Rural Route	RR	Southeast	SE	Square	Sq	Southwest	SW	Street	St			Trail	Trl			Turnpike	Tpke			Wav	Wav		
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Lane	Ln	North	N																																																																																										
Parkway	Pkwy	South	S																																																																																										
Place	Pl	East	E																																																																																										
Point	Pt	West	W																																																																																										
Road	Rd	Northeast	NE																																																																																										
Route	Rt	Northwest	NW																																																																																										
Rural Route	RR	Southeast	SE																																																																																										
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Trail	Trl																																																																																												
Turnpike	Tpke																																																																																												
Wav	Wav																																																																																												
<p><b>“Non-Person” Names – Corporations, Partnerships, LLC’s, etc.</b></p> <ol style="list-style-type: none"> <li>Enter full name as provided using upper and lower case. (<i>Association of Art Educators</i>)</li> <li>Spell out all words except suffix (<i>Corp, Inc, Co, Ltd</i>), if space allows, (<i>Smith Designs Inc</i>) unless suffix is part of the primary name. (<i>The Hair Company</i>)</li> <li>Use USPS standard business word abbreviations if name is longer than space allows.</li> <li>Include articles such as <i>a, an, or the</i>, if space allows. (<i>The Greeley Tribune</i>)</li> <li>Except for .com names, do not enter punctuation (periods, commas, apostrophes) or special characters (&amp;, %, #, @). (<i>Ricks Furniture, A and M Glass</i>)</li> <li>Enter a space in place of hyphens, dashes, and slashes. (<i>Econo Rate Rent A Car</i>)</li> <li>Omit punctuation and spaces between initials. (<i>ABC Corp, WW Grainger Inc</i>)</li> <li>Enter acronyms without spaces or periods as <b>Alternate Name</b> on <b>FOAIDEN</b>. (<i>UPS, NCMC, PERA</i>)</li> </ol>	<p><b>Word Abbreviations</b></p> <table border="0"> <tr> <td>Academic</td><td>Acdmc</td> <td>International</td><td>Intrntl</td> </tr> <tr> <td>Associates</td><td>Assoc</td> <td>Management</td><td>Mgmt</td> </tr> <tr> <td>Association</td><td>Assn</td> <td>National</td><td>Natl</td> </tr> <tr> <td>Council</td><td>Cncl</td> <td>Program</td><td>Prgm</td> </tr> <tr> <td>Division</td><td>Div</td> <td>Student</td><td>Stdnt</td> </tr> <tr> <td>Education</td><td>Educ</td> <td>United States</td><td>US</td> </tr> <tr> <td>Foundation</td><td>Fndtn</td> <td>University</td><td>Univ</td> </tr> </table>	Academic	Acdmc	International	Intrntl	Associates	Assoc	Management	Mgmt	Association	Assn	National	Natl	Council	Cncl	Program	Prgm	Division	Div	Student	Stdnt	Education	Educ	United States	US	Foundation	Fndtn	University	Univ																																																																
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Education	Educ	United States	US																																																																																										
Foundation	Fndtn	University	Univ																																																																																										
<p><b>Street Addresses</b></p> <ol style="list-style-type: none"> <li>Enter data in first address line, then second, then third.</li> <li>Enter delivery address in last used line before <b>City</b>.</li> <li>Abbreviate Post Office <i>PO</i> with no space and enter by itself on last used line before <b>City</b>. (<i>PO Box 1234</i>)</li> <li>Do not use special characters (#, %, &amp;). Enter <i>and</i> in place of &amp;. Use the word Unit, Ste, Apt, etc. in place of #, No or Number.</li> <li>Enter <i>c/o</i> in place of “<i>in care of</i>” in <b>Street Line 1</b> field.</li> <li>Enter attention line in <b>Street Line 1</b> field. (<i>Attn Bob Snow</i>)</li> <li>Enter periods, slashes and hyphens only in street number and zip code. (<i>39.2 Rd, 101 ½ Main St, 289-01 North Ave, 97203-4798</i>)</li> <li>Use numbers for numbered streets and include <i>st, nd, rd, th</i>. (<i>201 4th St, 1919 23rd Ave, 4801 NW 101st St</i>)</li> <li>Abbreviate street suffixes, unit designators, and compass directionals, if not part of primary name. (<i>N South Oak St</i>)</li> <li>If there are two street suffixes, abbreviate second; first becomes part of street name. (<i>1300 W 43rd Avenue Ct N</i>)</li> <li>Enter unit designator after street address or on line above.</li> <li>Spell out street and city names, if space allows. (<i>County Road 14, Interstate 5, Fort Collins, Idaho Springs</i>)</li> <li>Allow Banner to enter <b>City</b> and <b>State</b> from <b>ZIP Code</b>.</li> <li><b>Campus address</b> is to be used for <b>Employees ONLY</b>. Enter “Home” Department Name in <b>Street Line 1</b>, Building and Room Number in <b>Street Line 2</b>, Campus Box XXX in <b>Street Line 3</b>, and Greeley in <b>City</b>.</li> </ol>	<p><b>Foreign Addresses</b></p> <ol style="list-style-type: none"> <li>Enter as provided including punctuation, except commas.</li> <li>Do not abbreviate spelled-out words, if space allows.</li> <li>Enter non-Canadian state/province in <b>Street Line 3</b> field.</li> <li>Enter Canadian Province in <b>State or Province</b> field.</li> <li>The <b>County Code</b> field should be left blank.</li> <li>Enter postal code, maintaining spaces, in <b>Postal Code</b> field.</li> <li>Enter country name from validation table in <b>Nation</b> field.</li> </ol>																																																																																												
<p><b>Telephone Numbers</b></p> <ol style="list-style-type: none"> <li>Enter telephone numbers if provided. Do not use any punctuation (such as hyphens).</li> <li>The telephone number entry is divided into three fields. The <u>first field</u> is for area code entry, the <u>second field</u> should include all seven digits of the phone number (without a hyphen), the <u>third field</u> is reserved for the extension number.</li> <li>Only numeric values should be entered in any of the three fields, NO ALPHA CHARACTERS.</li> <li>All regional and local telephone numbers, including On Campus telephone types, are entered</li> </ol>	<p><b>Telephone Types</b></p> <table border="0"> <tr> <td>Business</td><td>BU</td> </tr> <tr> <td>Campus</td><td>CAMP</td> </tr> <tr> <td>Cell Phone</td><td>CELL</td> </tr> <tr> <td>Emergency</td><td>EMER</td> </tr> <tr> <td>Fax</td><td>FAX</td> </tr> <tr> <td>Home</td><td>HOME</td> </tr> <tr> <td>Permanent</td><td>PR</td> </tr> <tr> <td>Pager</td><td>PAGE</td> </tr> <tr> <td>Third Party</td><td>TP</td> </tr> <tr> <td>Toll Free</td><td>TOLL</td> </tr> </table>	Business	BU	Campus	CAMP	Cell Phone	CELL	Emergency	EMER	Fax	FAX	Home	HOME	Permanent	PR	Pager	PAGE	Third Party	TP	Toll Free	TOLL																																																																								
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## **DATA STANDARDS MANUAL PREFACE**

### **DATA STANDARDS**

The University of Northern Colorado (the University) utilizes the SCT Banner system integrated database. Within this integrated database various modules share data items. UNC recognizes that data standards are vitally important in protecting the data assets of the University by maintaining accurate and consistent data that is standardized for use in all areas of the University.

The “Data Standards Team” was formed to collaboratively develop this “Data Standards Manual” and the accompanying “Shared Validation Tables Dictionary.” The standards in this manual address the data entry standards for data that is shared among the various Banner systems.

This manual is intended as a standards policy reference guide and is not meant to be used as a training guide. This manual is also intended to be a living document with the review of each standard continuing on a regular basis. Any recommended changes to the manual need to be reviewed and approved by the “Data Standards Team.” (See appendix E).

### **PURPOSE**

The purpose of this document is to establish guidelines for:

- ∞ Stewardship of the University’s data and records maintained in the Banner Database;
- ∞ Ensuring data integrity, consistency and completeness;
- ∞ Providing appropriate security for personal information about staff and students;
- ∞ Providing appropriate access to Banner information system;
- ∞ Ensuring that the interpretation of information is accurate and consistent within the University;
- ∞ Outlining the responsibilities of users of the information maintained in the database.

### **ADMINISTRATIVE RESPONSIBILITY**

By law, certain data is confidential and the University cannot release it without proper authorization. Users of the data **MUST** adhere to any applicable federal and state laws as well as University policies and procedures related to data protection and confidentiality.

Data is a vital asset owned by the University. All institutional data, whether maintained in the central database or copied into other data systems (e.g. personal computers), remains the property of the University. Access to data is provided to support a user’s official University responsibility. Data will be used only for legitimate University business.

### **INFORMATION ACCESS DEFINITIONS**

All Banner users are assigned a Log-in User ID and Password. Users **ARE NOT** to share these access codes with anyone. The user is responsible for all transactions occurring during the use of their Log-in User ID and password.

“Query” access enables the user to view, analyze, but not change, University data. “Maintenance” access provides both inquiry and update capabilities. If data is downloaded to a personal computer or other device, the downloaded data must be safeguarded and utilized responsibly.

UNC will provide appropriate training for each type of access which will include the following:

- ∞ Reading, understanding and agreeing to the guidelines of this document, and any additional requirements identified by the data Steward;
- ∞ Hands-on training in accessing, understanding and interpreting the information;
- ∞ Maintaining the security, confidentiality, integrity and accuracy of the data accessed.

## **1. Data Administration**

## 1.A. Purpose

This manual provides data standards requirements for the protection, access, maintenance, and use of University data that is electronically maintained on the Banner system. This manual defines the responsibilities of users who input and access that data. Divisions/departments may have individual requirements that supplement, but do not replace or supersede the requirements outlined in this manual.

**The Standards outlined in this manual are authoritative for the Banner System AND for all University Systems that interface with the institution's Banner System.**

## 1.B. Data Confidentiality

### 1.B.1. General

The Banner information system is an integrated database with information on constituents of all types – applicants, students, employees, vendors, etc. Many benefits come from this integration. Personally identifiable information on all constituents is made available to University employees for the sole and explicit purpose of allowing them to carry out their official University functions. Any other use is prohibited. The same principles of confidentiality that apply to paper records also apply to electronic data. It is the responsibility of each school official to understand his or her legal responsibilities under the Family Educational Rights and Privacy Act (FERPA), Health Insurance Portability Accountability Act (HIPAA), Student & Exchange Visitor System (SEVIS), and the Gramm-Leach Bliley Act (GLBA). Failure to adhere to privacy regulations can result in disciplinary action up to and including termination.

**FERPA:** The Office of the Registrar administers FERPA for the University. General FERPA information can be found at <http://www.unco.edu/regrec/FERPA.htm>, all other inquiries should be referred to:

Registrar's Office  
Carter Hall 3002  
Greeley, CO 80639  
Phone: (970) 351-2231  
Fax: (970)351-1870  
[www.registrar.unco.edu](http://www.registrar.unco.edu)

**HIPAA:** The HIPAA Compliance Officials develop and/or oversee the development of policies and procedures that are in compliance with federal and state standards for the protection of the privacy and security of protected health information (PHI). Additional information including contact information can be found at <http://www.unco.edu/shc/PDF/HIPAA.pdf>.

**SEVIS:** The Center for International Education and Human Resources oversees policies and procedures that are in compliance with the Federal Department of Homeland Security and its subdivisions including U.S. Immigrations and Customs Enforcement.

**GLB:** The Gramm-Leach Bliley Act requires protection of personally identifiable financial information including Social Security Numbers.

**SSN:** The Social Security Number (SSN) Usage Committee is assigned the responsibility of overseeing the usage of SSN at the University. This committee was formed to address Colorado House Bill 03-1175. More information can be found at [http://www.leg.state.co.us/2003a/inetcbill.nsf/fsbillcont/195ECFC2D5ED0A4A87256C68004FC2A7?Open&file=1175\\_enr.pdf](http://www.leg.state.co.us/2003a/inetcbill.nsf/fsbillcont/195ECFC2D5ED0A4A87256C68004FC2A7?Open&file=1175_enr.pdf)

## 1.B.2. Student Directory Information

Based on FERPA requirements as outlined in the [UNC Access to Student Records](#) policy, “directory information” for enrolled students is eligible for release unless the student requests that it be held confidential. The University designates the following student information as directory information:

Name	Address	Telephone number
E-mail address	Birth date	Classification
Dates of attendance	Enrollment status	Major field of study
Most recent institution attended	Honors and awards	Publications
Degrees pursued or being pursued		
Degree(s) conferred and conferred date(s)		
Physical factors of athletes (height and weight)		
Past and present participation in officially recognized sports and activities		

Telephone numbers that are identified as “unlisted” in the Banner System will not be released or printed in “directory information.”

## 1.B.3. Confidentiality Indicator – Students only

After a student has filled out a “Request for Non-Release of Directory Information” form and submitted it to the Office of the Registrar, the Registrar’s Office will set the confidentiality indicator. When any information is accessed in the system about the student a warning will appear:

**Warning: You are attempting to access information that is federally protected**

“Confidential” will also appear in most forms accessed to remind faculty and staff that information on the student is not to be released.

## 1.B.4. Releasing Confidential Information

Releasing **any** information (including directory information) about a student who has signed a “Request for Non-Release of Directory Information” form should never occur.

The Office of the Registrar handles all requests for student information, and any such request should be forwarded to the Registrar.

## 1.C. Data Stewards

### 1.C.1. General

**Below is a listing of the six duties that have been assigned to data stewards for their respective modules. The primary tasks are:**

- 1) Reviewing Banner data for accuracy and dependability
- 2) Reviewing and approving Insight reports for accuracy and dependability
- 3) Updating and maintaining Banner validation tables and other system maintenance forms
- 4) Assigning Banner Security Access
- 5) Assigning Insight reporting security access
- 6) Supervising the addition or changing of Person and Non-Person changes.

Accuracy and completeness of Banner data can be maintained through adequate training and adherence to the requirements of this manual and any additional requirements as set forth by the Data Steward.

Banner validation and rule tables have been established to conform to the requirements of this manual and Banner processes. These validation tables create the drop-down tables that are utilized throughout the Banner system.

Banner users must first be authorized to access the Banner System by their immediate supervisor. This access is then approved by the responsible Banner Data Steward. Data Stewards must be satisfied that the employee has received adequate training and that a “need to know” is clearly demonstrated before granting security access to the Banner System. By approving user access to University data, the Data Steward consents to the use of that data within the normal business functions of administrative and academic offices or departments.

The ability to create employees, students and vendors in the Banner System is restricted to Human Resources (employees), the Admission’s Office (students), the Registrar’s Office (students), the Graduate School (students) and Financial Services (vendors). The Data Steward for each area is responsible for the data that is input into the Banner System by the employees that they supervise who enter data to create persons and non-persons.

**Misuse or inappropriate use by individuals will result in revocation of the user’s access privileges.**

### 1.C.2. Table of UNC Stewards

**The 12 identified data stewards are:**

- 1) General – PM Team for restricted forms, Data Stewards for unrestricted forms
- 2) Human Resources – HR director for Human Resources forms
- 3) Human Resources – Payroll forms and system
- 4) Finance – Controller
- 5) Financial Aid – Financial Aid Director
- 6) Student – Bursar for Accounts Receivable
- 7) Student – Director of Admissions for Undergraduate Admissions
- 8) Student – Dean of the Graduate school for Graduate Admissions, Research and Extended Studies
- 9) Student – Registrar for all other Student Forms
- 10) VP for Administration – Parking Services, Bookstore, and Foundation data views for Insight reporting (shared responsibility with Registrar)
- 11) Athletics Compliance Officer – Athletics data view for Insight reporting (shared responsibility with Registrar)
- 12) Director, Student Health Services – Student Health Center Vaccination view for Insight reporting (shared responsibility with Registrar)

#### **Table of UNC Stewards**

##### **Area of Responsibility – Monitoring Banner data for accuracy and dependability**

General: General data  
 Human Resources: Human Resources data  
 Human Resources: Payroll data  
 Finance: Finance and budget data  
 Financial Aid: Financial Aid data  
 Student: Accounts Receivable data  
 Student: Undergraduate Admissions data  
 Student: Graduate/International Admissions, Research, Extended Studies data  
 Student: Academic, enrollment, advising, registration data

##### **Data Steward**

Project Management Team  
 Director of Human Resources  
 Payroll Director  
 Controller  
 Director of Financial Aid  
 Bursar  
 Director of Admissions  
 Dean of the Graduate School  
 Registrar

##### **Area of Responsibility – Reviewing and Approving Insight Reports:**

General: University Insight View reports  
 Human Resources: HR Insight View reports  
 Human Resources: Payroll Insight View reports  
 Finance: Finance Insight View reports  
 Financial Aid: Financial Aid Insight View reports  
 Student: Accounts Receivable Insight View reports  
 Student: Undergraduate Admissions Insight View reports  
 Student: Graduate/International Admissions, Research, Ext. Studies Insight Views reports  
 Student: Academic, Advising and Enrollment Insight Views reports  
 Student/Payroll/Finance: Multiple PIDM Insight View reports  
 Student and Payroll: Parking Services Insight View reports

##### **Data Steward**

All Data Stewards  
 Director of Human Resources  
 Payroll Director  
 Controller  
 Director of Financial Aid  
 Bursar  
 Director of Admissions  
 Dean of the Graduate School  
 Registrar  
 PM Team  
 Registrar/VP for Administration  
 Registrar/Athletics Compliance Officer  
 Registrar/Director, Student Health Services  
 Registrar  
 Registrar/Financial Aid Director

Student and Financial Aid: Athletics Insight View reports

Student: Student Health Center Vaccination View reports

Student: Bookstore View reports

Student/Financial Aid: Foundation View reports

##### **Area of Responsibility – Banner system maintenance/validation tables**

General: General system maintenance/validation tables

##### **Data Steward**

Project Management Team

## Banner Data Standards Manual

Human Resources: HR system maintenance/validation tables  
Human Resources: Payroll system maintenance/validation tables  
Finance: Finance and budget system maintenance/validation tables  
Financial Aid: Financial Aid system maintenance/validation tables  
Student: Accounts Receivable system maintenance/validation tables  
Student: Undergraduate Admissions system maintenance/validation tables  
Student: Graduate/Internatl Admissions, Research, Ext Std. system maint/valid tables  
Student: All other Student system maintenance/validation tables

Director of Human Resour  
Payroll Director  
Controller  
Director of Financial Aid  
Bursar  
Director of Admissions  
Dean of the Graduate Sch  
Registrar

### **Area of Responsibility – Assigning Internet Banner Security Access:**

General: General Internet Native Banner security access (Unrestricted)  
General: General Internet Native Banner restricted security access (Restricted)  
Human Resources: HR Internet Native Banner security access  
Human Resources: Payroll Internet Native Banner security access (Org security)  
Finance: Finance/budget Internet Native Banner security access (Fund/org security)  
Financial Aid: Internet Native Banner security access  
Student: Accounts Receivable Internet Native Banner security access  
Student: Undergraduate Admissions Internet Native Banner security access  
Student: Graduate/International Internet Native Banner security access  
Student: All other Student system Internet Native Banner security access

### **Data Steward**

All Data Stewards  
Project Management Team  
Director of Human Resour  
Payroll Director  
Controller  
Director of Financial Aid  
Bursar  
Director of Admissions  
Dean of Graduate School  
Registrar

### **Area of Responsibility – Adding Persons/Nonpersons**

General: General does not create students, employees or vendors  
Human Resources: HR creates employees, other than student employees  
Human Resources: Payroll does not create students, employees, or vendors  
Finance: Finance creates Vendors  
Financial Aid: Financial Aid does not create students, employees or vendors  
Accounts receivable does not create students, employees or vendors  
Student: Undergraduate admissions creates students applicants  
Student: Graduate admissions creates graduate and international students applicants  
Student: Registrar's office creates all other students, including student employees

### **Data Steward**

NA  
Director of Human Resour  
NA  
Controller  
NA  
NA  
Director of Admissions  
Dean of Graduate School  
Registrar

### **Area of Responsibility – Assigning Insight View Security Access:**

General: University Insight View security access (unrestricted)  
Human Resources: HR Insight View security access (Restrict Access to PII)  
Human Resources: Payroll Insight View security access (restricted by access to PII)  
Finance: Finance Insight View security access (restricted by Fund/Org security)  
Financial Aid: Financial Aid Insight View security access (Restrict access to PII)  
Student: Academic Advising Enrollment Insight Views security access (PII restrict)  
Student: Undergrad Admissions Insight View security access (Restrict access to PII)  
Student: Graduate/Intrnl Admis Insight View security access (Restrict access to PII)  
Student: Accounts Rec Insight View security access (Restrict access to PII)  
Student/Payroll/Finance: Multiple PIDM Insight View reports  
Student and Payroll: Parking Services Insight View reports

### **Data Steward**

All Data Stewards  
Director of Human Resour  
Payroll Manager  
Controller  
Director of Financial Aid  
Registrar  
Director of Admissions  
Dean of Graduate School  
Bursar  
PM Team/All Data Stewar  
Registrar/VP for  
Administration  
Registrar/Athletics  
Compliance Officer/Finan  
Aid Director  
Registrar/Director, Studen  
Health Services  
Registrar/VP for  
Administration  
Registrar/VP for  
Administration/Financial /  
Director

Student and Financial Aid: Athletics Insight View reports

Student: Student Health Center Vaccination View reports

Student/Payroll/Finance/Financial Aid: Bookstore View reports

Student/Payroll/Finance/Financial Aid: Foundation View reports

## RESPONSIBILITY FOR INSIGHT REPORTING VIEWS

<u>Data Steward</u>	<u>Module</u>	<u>INSIGHT VIEW</u>	<u>Restrictions</u>
1) PM Team/All Data Stewards	General module	1) University View	Unrestricted
1) PM Team/All Data Stewards	All Modules	17) Multiple PIDM	Extremely restricted SSN's
2) Human Resources Director:	Human Resources module	2) HR View	PII needs restricted
3) Payroll Director:	Payroll Module	3) Payroll View	PII needs restricted
4) Controller	Finance Module	4) Finance and Budget view	FUND/ORG Restricted
5) Financial Aid Director	Financial Aid Module	5) Financial Aid View	PII needs restricted
6) Bursar	Student Module	6) Accounts Receivable view	PII needs restricted
7) Director of UG Admissions	Student Module	7) Undergrad Admissions View	PII needs restricted
8) Dean of the Graduate school	Student Module	7) Graduate Admissions View	PII needs restricted
8) Dean of the Graduate school	Student Module	8) Research & Ex Studies View	PII needs restricted
9) Registrar	Student Module	9) Academic View	Very little PII – fairly unrestricted
9) Registrar	Student Module	10) Advising View	PII needs restricted
9) Registrar	Student Module	11) Enrollment view	Very little PII – fairly unrestricted
9) Registrar	ALL	12) Data Integrity View	Restricted to report reviewers
10) Registrar/VP for Administration	Student/HR Module	13) Parking services View	PII needs restricted
11) Registrar/Athletics Compliance Officer	Student/Financial Aid Module	14) Athletics View	PII needs restricted
12) Registrar/Director, Student Health Services	Student	15) Student Vaccination View	PII needs restricted
13) Assistant VP for Information Technology	ALL	16) Insight Test view	Restricted to report developers
14) Registrar/VP for Administration/ Financial Aid Director	All Modules	18) Foundation view	PII needs restricted
14) Registrar/VP for Administration/	All Modules	19) Bookstore view	Unrestricted (no PII)

## 1.D. Data Access

### 1.D.1. Banner Log-In and Password User Responsibility

**Users are not to share access codes such as log-in and passwords with anyone.**

All users must understand that data security, electronic or otherwise, is every user's responsibility. Users are responsible for data elements that are accessed. Users **MUST** protect all University data files from unauthorized use, disclosure, alteration, or destruction. Users are responsible for the security, privacy, and control of data within their control.

**The user is responsible for all transactions occurring during the use of their log-in ID and password.**

**Anyone found loaning or sharing their access codes, are subject to corrective and/or disciplinary action, up to and including termination.**

## 1.D.2. Banner Log-In and Security Assignment

“Banner Security Access Request” forms, along with related instructions, can be accessed through <http://www.unco.edu/ursaunc/resources.html> or by contacting the Technical Support Center at 351-4357.

An employee’s signature on a “Banner Security Access Request” form signifies agreement to abide by all University data standards, University policy and procedures and state and federal laws, as well as an understanding of the implications due to improper use.

Banner access is established based on particular job functions. “Query” access enables the user to view, analyze, but not change, University data. If data is downloaded to a personal computer or other device, the downloaded data must be responsibly used and accurately represented. “Maintenance” access provides both query and update capabilities. Maintenance access is generally limited to users directly responsible for the collection and maintenance of the data.

Specific Banner security classes will be assigned to each employee as appropriate. For example, a registration clerk could have maintenance access to registration process, but only query access to academic history information. Each user requesting access will contact the respective Data Steward to determine the appropriate Banner classes for assignment. The user is then required to obtain written authorization from both his/her direct supervisor and the responsible Data Steward before access will be granted.

After the “Banner Security Access” form has been approved by the employee’s supervisor and the proper Data Steward, the form is then forwarded to Information Technology for processing. Information Technology will then create the employee’s Banner user ID and assign the approved security access. At that point, Information Technology will notify the user of their Banner user ID, temporary password and relay any additional information as necessary to the user.

If a user’s Banner security request is denied by a Data Steward, the user’s supervisor may appeal the decision by writing a request for review of the decision to the Project Management Team. The Project Management Team’s decision will be final. The request for review should, at a minimum, include the following information:

- A description of the specific data access requested,
- Justification for access to the data,
- The name of the individual/position who denied the access to the data.

## 1.D.3. Banner User Names

### 1.D.3.a Banner User Name Format

Each Banner user is assigned a Banner user name that utilizes the employee’s first and last names as they are entered into Banner on “PPAIDEN” or “SPAIDEN” as follows:

FIRST NAME\_LAST NAME

### 1.D.3.b Banner User Name Termination

When an employee terminates employment, the following steps must be completed to inactivate or terminate the employee’s Banner user name:

1. Human Resources initiates an “Employee Termination” form that includes documentation for inactivating an employee’s user name.
2. Payroll removes the terminating employee’s payroll org and employee class security access from “PSAORGN”, “PTRUSER”, and “GOAEACC.” This security access termination is documented on the “Employee Termination” form.
3. Payroll forwards the “Employee Termination” form to Finance.
4. Finance removes the terminating employee’s finance fund and org security access from “FOMPROF”, “FOMUSFN”, “FOMUSOR”, and “FTMMGR.”
5. Finance forwards the “Employee Termination” form to the Technical Support Center (TSC).
6. The TSC inactivates (and if necessary – terminates) the terminating employee’s user name.

7. The TSC documents that the employee's user name has been inactivated or terminated on the "Employee Termination" form and returns the form to Payroll.

### 1.D.3.c Banner User Name Changes

Changing an active employee's Banner user name is sometimes necessary due to marriage, divorce, legal name changes, etc. This process is complicated and must be completed in proper order using valid documentation. The steps for completing a Banner user name change are as follows:

1. Both non-student employees and student employees must:
  - a. Complete an "Individual Change Request" form (See Appendix A.1)
  - b. Complete a "Banner USER\_NAME Change" form (See Appendix A.5).
  - c. Provide proper original documentation as described 2.D.2 below.
2. These forms and valid documentation are then submitted as follows:
  - a. Non-student employees' documents are submitted to the Human Resources office.
  - b. Student employees' documents are submitted to the Registrar's Office.
3. The Human Resources Office or Registrar's Office then:
  - a. Verifies that the change should be processed from the completed "Individual Change Request" form and the submitted, original documentation.
  - b. Following the identifying information change process described in 2.D.1 below, the employee's name is then changed using the appropriate Banner form: "PPAIDEN" or "SPAIDEN." This completes the Banner identifying information change but **does not change the employee's Banner user name.**
  - c. The **original** "Individual Change Request" form is then signed by the employee who made the name change to the Banner System. The date of the name change and whether the change was made to "PPAIDEN" or "SPAIDEN" is also noted on the bottom of this form.
  - d. A copy of the "Individual Change Request" form is then attached to the **original** "Banner USER\_NAME Change" form.
  - e. The **original** "Individual Change Request" form is kept in the Human Resources Office or the Registrar's Office to document that the name change was completed in the Banner System.
  - f. The "Banner USER\_NAME Change" form plus the **copy** of the "Individual Change Request" form is then **faxed** to the Technical Support Center (TSC).
  - g. The original "Banner USER\_NAME Change" form plus a copy of the "Individual Change Request" form is then securely filed in the Human Resources Office for both Student employees and Non-student employees.
4. The Technical Support Center (TSC) then:
  - a. Creates the new Banner user name to match the employee's revised name.
  - b. Initiates the processes necessary to revise the employee's University email address.
  - c. Removes the BANSECR CLASS security access for the security classes assigned to the employee's previous Banner user name.
  - d. Reassigns the identical BANSECR CLASS security access to the employee's new user name.
  - e. Inactivates the employee's previous user name.
  - f. The TSC employee who completes this process then signs and dates the faxed copy of "Banner USER\_NAME Change" form.
  - g. The copy of the "Banner USER\_NAME Change" form plus the copy of the "Individual Change Request" form is faxed to the Finance Office.



## 2. Data Input – Original Entry and Modifications

### 2.A. Modifications to Data Standards

Modifications to Data Standards elements listed in this manual require supporting documentation and a formal written request submitted to the Data Standards Team for approval.

### 2.B. Modifications to Validation Tables

Modifications to Banner validation table elements require supporting documentation and a completed “Validation Table Change Request Form” (Appendix B) submitted to the Table Data Steward. Banner validation table elements are documented in the Banner “Validation Table Dictionary.” They can also be accessed directly through the Banner System.

### 2.C. Original Entry of Student, Employee and Vendor Records

Banner System student, employee and vendor “identifying information” includes Bear Identification Number, legal name, marital status, social security number (SSN) and/or taxpayer identification number (TIN).

In the Banner System, a “Person” is an individual who uses a SSN for taxpayer identification purposes. “Person” related student, employee and/or vendor identifying information is entered into the Banner System using the Banner form “SPAIDEN,” “PPAIDEN,” or “FOAIDEN.”

In the Banner system a “Non-Person” is an entity that uses a TIN for taxpayer identification purposes. “Non-Persons” can only be vendors in the Banner System. A “Non-Person” cannot be a student and/or an employee. “Non-Person” vendor identifying information is entered into the Banner System using the Banner form “FOAIDEN.”

Each “Person” and “Non-Person” record is assigned a unique Bear Identification Number. The Bear Identification Number can be automatically system generated or manually assigned using the GOAMTCH form. “Person” and “Non-Person” records also generally include other individually identifiable information such as Name, SSN’s, TIN’s, marital status, birthdates, etc.

The original entry of name, SSN, TIN, marital status and/or birthdate is based upon the following information:

- Original student information from self-reported information provided by the student through the application process. Students are required to provide an SSN if they are applying for financial aid and/ or the College Opportunity fund (COF). This information is “Person” information.
- Original employee information from self-reported I-9 and W-4 information provided by the employee through the employment application and hiring process. This information is “Person” information.
- Original vendor information from W-9 information provided by the vendor through the purchasing process. This information is “Person” information for vendors who use a SSN for tax purposes. This information is “Non-Person” information for vendors using a TIN for tax purposes (corporations, partnerships, LLC’s, etc).

*An invalid SSN/TIN should never be entered intentionally into the SSN/TIN field.* Only persons who apply for financial aid or the COF, and/or submit a W-4, W-9 or I-9 form for Human Resources or Accounts Payable purposes, are required to provide an SSN or TIN to the University. In cases where an SSN or TIN is not required, the SSN/TIN field should be left blank.

As detailed in Section 2.A., Banner users who are authorized to enter original student, employee and vendor information into the Banner System must carefully complete a search of the Banner System before creating a new record to ensure that the student, employee, or vendor has not previously been created in the Banner System.

### 2.D. Modifications to Legal Name, Marital Status, Social Security Number and/or Taxpayer Identification Number

Bear Identification Numbers, SSN’s, TIN’s, marital status, birthdates, etc. can be changed by authorized functional Banner users. Changes made by functional users to either a Bear Identification Number or to a Name are noted with either an “I” (Identifier Change) or an “N” (Name Change) on the GUIALTI “Person/Non-Person” Banner Search form. If a Banner functional user attempts to use either a Bear Identification Number or a Name that has been changed, Banner will automatically retrieve the information using the updated or correct Bear Identification Number and/or Name.

### 2.D.1. “Person” and “Non-Person” Identifying Information Change Process

Changes required to correct initial input errors related to identifying information (name, marital status, SSN and/or TIN) are based upon the original, correct documentation provided to the University, and therefore, do not require additional documentation.

When adjustments to identifying information are required due to errors and/or changes to the original documentation supplied to the University by “Person” students, employees and/or vendors, the person’s Banner roles must first be identified using the Banner form “GUASYST”. If the “Person” has only an admissions and/or general student role in “GUASYST”, the Admissions Office may make the necessary changes to “SPAIDEN” without additional documentation.

If a “Person” has other roles identified in “GUASYST” (registration, employee, vendor, financial aid applicant), valid documentation (see 2.D.2 and 2.D.3 below) is required to make changes to the “Person” legal name, marital status, and/or SSN. The appropriate “Individual Change Request form” and/or “Social Security Number Change Request Form” (Appendix A.1 and A.2) must also be completed and submitted to the proper office as noted in 2.E. below.

“Non-Person” vendors who have never been a student or employee of the University must complete a “Vendor Non-Person Change Request Form” (Appendix A.3), along with a revised W-9 form to make legal name or TIN changes. The completed change form along with original documentation (see 2.D.4 below), is then submitted to the Purchasing office as noted in 2.E below.

### 2.D.2. Acceptable Documentation for “Person” Student or Employee Information Changes

Documents supplied may be originals, copies or faxed copies.

Acceptable documentation for student or employee’s SSN changes is the person’s:

- Social Security Card.

Acceptable documentation for a student or employee’s legal name change includes the person’s:

- Birth Certificate
- Social Security Card
- Marriage License
- Passport
- Citizenship Papers
- Driver’s License
- Court Document

Acceptable documentation for a student or employee’s marital status change includes the person’s:

- Marriage License
- Court Document

### 2.D.3. Acceptable Documentation for “Person” Vendor Information Changes

A “Person” vendor is an individual using an SSN for identification purposes. “Person” vendors include sole proprietorships, independent contractors, employees and students receiving expense reimbursement checks, etc.

A revised W-9 form is acceptable documentation for a change to legal name, SSN and/or marital status for a “Person” vendor **who is not currently and has not previously been a student and/or employee at the University**. Accounts payable and/or Purchasing personnel must check Banner “GUASYST” (and the Legacy System XDB if still in use) to determine if a “Person” vendor is currently or has been previously a University student or employee.

**“Person” vendors who have previously been or currently are University students and/or employees must provide the same documentation for name, SSN, and marital status changes as students or employees as described above in 2.D.2.**

### 2.D.4. Acceptable Documentation for “Non-Person” Vendor Information Changes

A “Non-Person” vendor is a corporation, partnership, and/or LLC that uses a TIN for identification purposes.

A revised W-9 form is acceptable documentation for a change to legal name and/or TIN for a “Non-Person” Vendor.

## 2.E. Identifying the Appropriate Data Steward to Complete Identifying Information Changes

Identifying information changes can affect more than one Banner module; therefore, the appropriate Data Steward must be determined before making such changes to Banner records.

The appropriate Data Steward can be determined using the Banner form “GUASYST”. When presented with a completed “Individual Change Request” form or a “Non-Person Vendor Change Request” form, authorized Banner users will enter the student, employee or vendor Bear number into “GUASYST”. The current name of the student, employee or vendor will be retrieved by the Banner System. The Banner user will then go to the next block of “GUASYST” and Banner will identify the various roles the “Person” or “Non-Person” may have, including: admissions, general student, financial aid applicant, employee and/or vendor.

As identified by “GUASYST”, the student, employee or vendor should be directed to submit a completed “Individual Change Request Form” and original, required documentation to the appropriate Data Steward as identified below:

- **Undergraduate students before enrollment:** Undergraduate students who have been admitted but have not yet registered will have only an admissions role in “GUASYST.” **Changes for these students should be made by the Admissions Office and do not require separate documentation.** If the student has any other role noted in “GUASYST”, the change should be made in the Registrar’s Office and **appropriate documentation is required.**
- **Graduate students before enrollment:** Graduate students who have been admitted but have not yet registered will have only an admissions role on “GUASYST.” **Changes for these students should be made by the Graduate School Office and do not require separate documentation.** If the student has any other role noted in GUASYST, the change should be made in the Registrar’s Office and **appropriate documentation is required.**
- **International Students before enrollment:** International students who have been admitted but have not yet registered will have only an Admissions role on GUASYST. **Changes for these students should be made by the Graduate School Office or the International Admissions Office and do not require separate documentation.** If the student has any other role noted in “GUASYST”, the change should be made in the Registrar’s Office and **appropriate documentation is required.**
- **All students and student employees after enrollment:** Students who have enrolled in the University will have an admissions and a student role in “GUASYST.” These students could also have an employee and/or vendor role in “GUASYST.” The student role, however, takes precedence and **changes for these students are made by the Registrar’s Office. Appropriate documentation is required.**
- **Non-student employees:** Non-student employees will have an employee role in “GUASYST.” These individuals may also have a vendor role in “GUASYST.” The employee role, however, takes precedence and **changes for these individuals are made by the Human Resources Office. Appropriate documentation is required.**
- **“Person” vendors who have previously been and/or currently are a student and/or employee of the University:** These individuals will have multiple roles such as admissions, general student, financial aid applicant and/or employee in “GUASYST” that are in addition to their Banner vendor role. **Information changes for these individuals should be made by the Registrar’s Office or the Human Resources Office. Appropriate documentation is required.**
- **“Person” vendors who have never been a student and/or employee of the University:** These individuals will only have a vendor role in “GUASYST.” **Changes for these individuals are made by the Purchasing Office. A valid revised W-9 form is required for documentation.**
- **“Non-Person” vendors:** “Non-Person” vendors will only have a vendor role in “GUASYST.” It is not possible for a “Non-Person” to be a student or an employee. **Changes for these entities are made by Purchasing Office. A valid revised W-9 form is required for documentation.**
- **Students and employees with multiple roles:** Individuals may have multiple roles in “GUASYST” (general student, financial aid applicant, employee and/or vendor). The person’s student and/or employee role takes precedence over the vendor role. **Changes for these individuals can be made by either the Registrar or Human Resources Office. Appropriate documentation is required.**

## 2.F. Data Entry Process for Completing an Identifying Information Change

As determined by the Data Steward, any one of the following Banner forms can be used to make identifying information changes:

- Students: “SPAIDEN”
- Employees: “PPAIDEN”
- Vendors: “FOAIDEN”

**Before any changes are made to the Banner System, the spelling of the name and/or the numbers in the Bear Identification Number, SSN and/or TIN should be verified.**

Authorized Banner users making the identifying information changes are responsible for ensuring that changes are made only to the appropriate and correct records. To retrieve the correct records to be changed, the Banner user should enter the correct Bear identification number into the appropriate Banner Identification form (SPAIDEN, PPAIDEN or FOAIDEN). If the correct Bear identification number is unknown, the Banner user should complete a search of valid Bear Identification numbers using GUIALTI and using the “Person” or “Non-Person’s” name, Bear Identification Number, SSN, TIN, and/or birthdate as parameters. Once the correct “Person” or “Non-Person” record is retrieved, the incorrect information should be corrected by typing over it with the correct information. After the correct information has been entered, the record should be saved to the Banner System.

**DO NOT CREATE A NEW STUDENT, EMPLOYEE, or VENDOR RECORD WHEN MAKING A LEGAL NAME, MARITAL STATUS, SSN and/or TIN CHANGE.**

**DO NOT CHANGE A LEGAL NAME, MARITAL STATUS, SSN and/or TIN RECORD WITHOUT PROPER LEGAL, ORIGINAL DOCUMENTING PROOF**



### 3.C.2. Multiple PIDM “Clean-Up” Team

A planned and continuing coordinated effort between the Banner Finance, Student, Financial Aid, and Human Resources modules is required to:

- Identify the correct and valid PIDM for continued use.
- Transfer information recorded in the incorrect PIDM to the correct PIDM using standard Banner processes.
- Purge incorrect multiple PIDMS or restrict the use of incorrect multiple PIDMs that cannot be purged.

Each Banner module Data Steward assigns a representative to the Multiple PIDM “Clean-Up” Team to be the key contact involved in multiple PIDM issues. Key Banner module users must be involved on an ongoing basis to resolve multiple PIDM entries before further use of the multiple PIDM records prohibits them from being purged from the system. When multiple PIDM records cannot be system purged, they will be contained so further use of the incorrect, multiple record will be severely limited.

### 3.C.3. Multiple PIDM Reporting Tools

Potential multiple PIDM records are identified by running a series of scripts against key Banner tables to create reports of possible multiple PIDM records. Currently, the “Matching Person PIDM” and the “SPRIDEN DO NOT USE” reports are available to authorized users at <http://ursa.unco.edu>. Both reports use real-time data and are processed upon the user’s request.

The “Matching Person PIDM” report searches for multiple Bear identification numbers that utilize a single SSN and have multiple PIDM numbers. This report provides:

- The Banner Activity date for the most recently created PIDM,
- The identical SSN shared by both Bear identification numbers and both PIDMs.
- The user ID for the employees that created each PIDM
- The Bear Identification Number for each PIDM
- Each PIDM number.

The “SPRIDEN DO NOT USE” report lists all possible multiple PIDM records that have completed Step 1 noted below and have had the words “DO NOT USE” added to the name related to the incorrect PIDM. This report provides:

- The incorrect last name with DO NOT USE added to it.
- Incorrect PIDM number.
- Bear identification number tied to the incorrect PIDM
- First and middle name tied to the incorrect PIDM
- Activity date and name of user adding DO NOT USE to incorrect name.
- Original creation date and user who created the incorrect PIDM
- SPAIDEN, FOAIDEN, or PPAIDEN form used to add DO NOT USE to name.

### 3.C.4. Identifying which PIDM to maintain and which PIDM to eliminate

Members of the Multiple PIDM “Clean-Up” Team analyze the “Matching Person PIDM” report regularly to determine which PIDM to maintain and which PIDM to eliminate using the following procedures:

- The Banner roles (admissions, general student, registration, vendor, financial aid applicant, employee, etc.) assigned to each PIDM are determined using the Banner form “GUASYST.”
- In most cases, a PIDM with the roles of registered student, financial aid, accounts receivable and/or employee is more difficult to reclassify than a PIDM with only admissions or vendor roles. A PIDM with a registered student, financial aid, accounts receivable and/or employee role will generally have precedence over a PIDM with only admissions or vendor roles.

Members of the Multiple PIDM “Clean-Up” team will consult with each other and with Information Technology Data Base Administrators when it is difficult to determine which PIDM to continue and which to eliminate.

### 3.C.5. Multiple PIDM “Clean-Up” Process

Once a multiple PIDM is identified for elimination, the incorrect PIDM will be restricted from further use by the following procedures:

1. The words “DO NOT USE” should be entered at the end of the last name in the last name field for the PIDM that should no longer be used. This change should be made to “SPAIDEN”, “PPAIDEN” or “FOAIDEN” as appropriate. This alerts users not to use the record until it is purged from the system. The name of the employee completing this step and the date of completion should be documented on the Multiple PIDM Correction Form.” A copy of this form can be found in Appendix A.6.
2. Use Multiple PIDM Hold Code 90 in SOAHOLD to put a “Hold” on the incorrect PIDM. This prevents further transactions from occurring against the incorrect PIDM record. The name of the employee completing this step and the date of completion should also be documented on the “Multiple PIDM Correction Form.”
3. If determined to be necessary, the affected student, employee and/or vendor will be contacted by the appropriated data steward and informed of the correct Bear Identification Number to be utilized by the student, employee and/or vendor.
4. All information that can be manually removed from an incorrect PIDM using standard Banner Processes should be removed by Banner Functional Area employees. If appropriate, this information should be manually reentered into the correct PIDM. The name of the employee(s) completing this step and the dates of completion should also be documented on the “Multiple PIDM Correction Form.”
5. After the data base administrators have removed as much information as possible from the incorrect PIDM using standard Banner processes, it may be possible to purge any remaining information (such as “name”) assigned to the incorrect PIDM and then purge the PIDM.
  - It is generally only possible to purge incorrect PIDMs if they have only a single role in the Banner system according to GUASYST.
  - The incorrect PIDM may only be purged from the Banner System by an authorized Information Technology Data Base administrator with the approval of each data steward as documented on the “Multiple PIDM Correction Form.”
6. Some information cannot be manually removed from an incorrect PIDM to the correct PIDM using standard Banner processes. An example of such information would be Accounts Payable Vendor check payment history information. Check payment history cannot be altered by accounts payable or purchasing employees after it has been processed.
  - ∞ PIDMs with multiple roles in GUASYST and payment or transcript history cannot be purged from the Banner system.
  - ∞ Some information will remain in the incorrect PIDM but new information will not be processed into the incorrect PIDM. These incorrect PIDMS will be adequately contained by these procedures.

## 4. Identification

### 4.A. Current Identification

#### 4.A.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, driver's license, passport and/or citizenship papers.

The Offices of Undergraduate Admissions, Graduate and International Admissions, Extended Studies, Registrar, and Human Resources consider the name originally reported on a "Student Application for Admission" to the University 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 lower-case letters so that when a name is printed on correspondence, it looks contemporary and professional. Name formats have also been developed to meet United States 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 the "Person" name to indicate first name, middle name, last name, and preferred first name (not required). This will facilitate correct entry into the respective fields in Banner.

**Before creating an entity ("Person" or "Non-Person") in the Banner System, a thorough name and ID search must be performed to ensure the entity does not already exist in Banner and to avoid the creation of a multiple PIDM. Use the Banner form "GOAMTCH" to search for an existing record. See Section 3 regarding Common Matching and Ensuring Unique Banner Records.**

#### 4.A.2. "Person" and "Non-Person" Bear Numbers

##### 4.A.2.a "Person" ID

UNC Bear Numbers will be used for all "Person" ID's.  
Banner will supply a new Bear Number for each newly created person.

##### 4.A.2.b "Non-Person" ID

UNC Bear Numbers will be used for all "Non-Person" ID's.  
Banner will supply a new Bear Number for each newly created "Non-Person."

##### 4.A.2.c Changes to Bear Numbers

It is vitally important to maintain the unique integrity of each PIDM and its relationship to a UNC Bear identification number. A UNC Bear Number, therefore, is only cancelled when duplicate and/or multiple numbers are assigned to a single entity or Banner PIDM. Only in the rarest of circumstances will a student or employee be manually assigned a different UNC Bear Number other than the one automatically assigned by the Banner System. Requests for such changes may be made by students through the Registrar's Office and by employees through the Human Resources office.

#### 4.A.3. Name Types

A "Person" or "Non-Person" **current** name is the **legal** name and does not require a separate name type. Previous legal or other non-legal names do require a separate name type. These name types are identified on the "GTVNTYP" validation table as:

AKA:	Also Know As
FRMM:	Former Married Name
MAID:	Maiden Name
PREV:	Previous legal Name

#### 4.A.4. “Person” Names

##### 4.A.4.a Last, First and Middle Names

The last, first, and middle names should be entered 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. DO NOT enter leading spaces in any fields.

##### 4.A.4.b Name Case

If a person has written all upper-case letters, convert the name to 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, names will be converted into an upper- and lower-case format based upon these rules.

##### 4.A.4.c Name Initials, Abbreviations, and Symbols

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

The ampersand (&) should never be used in place of “and.”

**The percent symbol (%), the pound sign (#) and double quotations should never be used.**

##### 4.A.4.d Multiple 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.

W Mark Jones

Enter as: **First Name**= W Mark / **Middle Name**= blank / **Last Name**= Jones

If it is later learned that the “W” stands for William, the name should be changed 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.

Anne Marie Susan Smith

Enter as: **First Name**= Anne Marie / **Middle Name**= Susan / **Last Name**=Smith

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.

Anne Marie Smith

Enter as: **First Name**= Anne Marie / **Middle Name**= blank / **Last Name**= Smith

##### 4.A.4.e Multipart Names

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

Van Buren

Van der Vaart

Vander Vaart

**4.A.4.f Long Names**

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

**4.A.4.g Persons with One Name**

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

**4.A.4.h Punctuation**

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

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

**4.A.4.i Prefixes and Suffixes**

Prefix and Suffix fields are only used if the person indicates a prefix or suffix.

Salutations (such as Dr, Rev, etc.) are considered prefixes and if indicated by the person should be entered in the prefix field on General Person (SPAIDEN, FOAIDEN, PPAIDEN) forms. Prefixes will be entered in normal upper- and lower-case with no punctuation.

Professional status indicators (such as MD, DO, PhD, DVM, ESQ, etc) and generational indicators (such as Jr, Sr, II, IV, etc.) are considered suffixes and if indicated by the person should be entered in the suffix field on the General Person (SPAIDEN, FOAIDEN, PPAIDEN) forms.

DO NOT include any punctuation with a prefix or suffix.

Correct:	Dr	MD	PhD	Jr
Incorrect:	Dr.	M.D.	Ph.D.	Jr.

DO NOT enter prefixes or suffixes in the name fields (first, last, middle, preferred) of the current identification block on the Banner IDEN forms.

See Appendix C.1 for a list of Prefix abbreviations.

See Appendix C.2 for a list of Suffix abbreviations.

**4.A.4.j Preferred First Name**

The preferred first name field is used for variations to the legal name. The use of the preferred first name field is optional in Banner and is for 'informational use' only. The preferred first name field is not used in Banner reports supplied with the system. The information provided by this field, however, is available for use on any reports or letters generated and maintained by the University.

Example:	
Current Name:	William Knight
<b>Preferred First Name:</b>	Bill
Current Name:	D Mark Williams
<b>Preferred First Name:</b>	Mark

**4.A.4.k Full Legal Name**

The current name field in Banner is considered the legal name (See Section 4.A.1.). The full legal name field is, therefore, NOT used or maintained by the University.

#### 4.A.5. “Non-Person” Names

All “Non-Person” name information is typed in normal upper- and lower-case format (i.e. not all upper- or lower-case). All words should be spelled out if space allows, except the business suffix (Corp, Inc, Co, Ltd) unless it is part of the primary name. Use U.S. Postal Service standard business word abbreviations to accommodate space constraints. If an article (a, an, or the) is used as an adjective within the full legal name of an 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 Home Depot).

Do not space between initials. Acronyms should be used only if the full name of the vendor is unknown. Acronyms should be entered as alternate names.

Except for the period in “.com” names, do not use periods, commas, apostrophes, or special characters. Use “and” in place of an ampersand (&) and a space in place of a hyphen (-) or slash (/).

Example:

ABC Trucking Corp	First National Bank Inc
US Department of Defense	The Earle
University of Portland	Karens Kitchen
JF Kennedy Company	AT and T

### 4.B. Alternate Identification

#### 4.B.1. General

For the alternate identification block, follow the same standards as shown in Section 3 (Current Identification).

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

Example:

Name:	Lee Livingstone
Previous Name:	Lee Stanley

Enter previous name (Lee Stanley) and save.

Enter current name (Lee Livingstone) and save.

Previous name will appear in the alternate identification block.

The University’s previously used five digit ID numbers that were effective from Fall 1959 through Summer 1971 were migrated into Banner and are maintained as an additional means of identification.

#### 4.B.2. Name Type

Name type is required in the alternate identification block (see Section 4.A.3.).

#### 4.B.3. Change Type

Change type shows whether the alternate record is for a previous/alternate name or a previous/alternate ID.

### 4.C. Validation Tables

See the “Validation Table Dictionary” for additional information regarding the following validation tables:

**FTVVITYP – Vendor Type Codes** (Required).

**GTVNTYPT – Name Type Codes** (Required only for previous and non-legal names).

### 4.D. Summary

- Use the Banner form “GOAMTCH” to search for existing records and prevent duplicate and/or multiple records.
- Banner will automatically generate a UNC Bear Number for all entities.
- Use standard upper- and lower-case letters for names.
- Do not use special characters in names (ex. &, %, #, etc.). This includes periods for initials or abbreviations.
- Enter prefixes and/or suffixes if provided using standard abbreviations.

- Preferred first name is an optional field that can be populated with a name other than the current legal name. The current legal name, however, must be also be provided.
- Full legal name field is not used at the University.

## 5. Address Information

### 5.A. General

University-wide conventions are critical for shared data such as addresses. For example, units with legal, financial or marketing responsibility (such as Accounts Payable, Admissions, Registrar and/or Student Financial Aid) must be able to produce individualized correspondence conforming to formal addressing rules. Academic departments and other areas may have less stringent formatting requirements, but should still follow the standards set forth here.

The University's Data Standards Team has utilized the following sources to determine the standards to be utilized in the University's Banner System:

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

**The Standards outlined in this manual are authoritative for the Banner System AND for all University Systems that interface with the University's Banner System.**

All information should be entered into the Banner System using normal upper- and lower-case format. U.S. Postal standards, however, prefer mailing addresses to be in all upper-case and international postal standard **require** upper-case. To accommodate these needs, Banner data can be revised as needed to all upper-case when necessary using the pop-selection process.

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."** These guidelines 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.

### 5.B. Address Type

The Banner System standardized list of address types is based on address purposes, rather than University department.

- **"MA"** is the primary address type for persons.
- **"BU"** is the primary address type for "Non-Persons" (vendors).
- **"CA"** is the address type used for employee payroll.
- All employees will have both an **"MA"** and a **"CA"** address in the Banner system.
- "Person" vendors, including employees and students, may have address types (**BI, CA, LB, and/or PO**) that are different than their **"MA"** mailing address.
- Other address types may be used if an address is different than the primary address.

Identical addresses should only be keyed into different address types if there is a valid purpose for doing so. For example, if a student's mailing address (MA) is identical to his/her permanent address (PR) and/or parent address (PA); the address needs to be entered only into the mailing address (MA) type. Accounts Payable and Purchasing addresses, however, often need to be separately identified; therefore, it is acceptable to enter identical addresses using the PO, BU, LB and/or BI address types.

"MA" mailing addresses may only be changed by the address Data Stewards identified in 5.A.3 below and by following the address change procedures outlined in Section 1.E. Authorized Accounts Payable and Purchasing Employees may not change "MA" Mailing addresses but they may add addresses into the following address types, as needed, to process payments:

- BI-Billing Address,
- BU-Business Address Type,
- LB-Library Vendor
- PO-Purchasing address types

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The address types listed above (BI, BU, LB, and PO) are also the only address types that may have more than one “Active” sequence number and, therefore, more than one valid “active” address during any single time period. All other Address types may have only one sequence number and, therefore, only one “Active” address type during any single period of time.

Each Banner application (Admissions, Accounts Payable, Payroll, etc.) will look for a valid address in a prescribed, hierarchical sequence. For example, the billing routine might look for addresses in this order: BI and then MA, followed by PR. This hierarchy should be prepared with the understanding that MA is considered by the University to be the primary or “preferred” address and that other addresses types may or may not be populated. Before running Banner system applications that require the use of address types, users should verify that the hierarchical sequence to be used will retrieve the highest number of valid addresses.

See the “Validation Table Dictionary” for additional information regarding validation table:

### STVATYP – Address Type Codes.

#### 5.C. Address Data Stewards

Unless a correction is necessary for an initial data entry error, prior addresses should not be changed or deleted without authorization. Address information can be changed by the following Data Stewards:

Address Type	Address Description	Applies to:	Data Steward - Student Addresses	Data Steward - Employee Addresses	Data Steward - Vendor Addresses
BA	Billing -Accounts Receivable	Students	Student Self-Service, Registrar & Accts Rec	NA	NA
BI	Billing -Accounts Payable	Vendors	Accounts Payable	Accounts Payable	Accounts Payable
BU	Business - Accounts Payable	Vendors	Accounts Payable	Accounts Payable	Accounts Payable
CA	Payroll Campus Addresses	<b>Employees only</b>	Human Resources	Human Res	Human Res
EM	Emergency Contact	Students & Employees	Student Self-Service, Registrar & Accts Rec	Human Res	NA
LB	Library Vendor	Library Vendors	Library	Library	Library
MA	Local Mailing, US Postal Service	Students, Employees, “Person” Vendors	Student Self-Service, Registrar & Accts Rec	Human Res	NA – Use BI, BU, LB or PO if change needed
PA	Parent Address	Students	Student Self-Service Registrar & Accts Rec	NA	NA
PO	Purchase Order Address	Vendors	Purchasing	Purchasing	Purchasing
PR	Permanent Address	Students, Employees	Registrar	Human Res	NA
RF	Returned Mail - Identifies a “bad” address in the Banner System	Students, Employees and Vendors	Registrar & Accts Rec	Human Res	Purchasing
TBD	To be determined – On Campus Housing	Students	CBORD	NA	NA
TP	Third Party Billing	Students	Accounts Receivable	NA	NA

#### 5.D. From/To Dates

When adding a subsequent address of the same address type, the prior address should be end dated, the inactive box checked, and the new address added.

#### 5.E. Sequence Number

The sequence number field is automatically populated by Banner.

#### 5.F. Street Lines 1, 2, and 3

The main components of a delivery address are:

- Address number including special characters, symbols and punctuation;
- Street name;
- Street suffix;
- Secondary unit designator;

- Compass directional.

**5.F.1. Special Characters, Symbols, and Punctuation**

Special characters should never be used in the street lines of an address unless it is part of the punctuation of an address number.

Punctuation is normally limited to periods, slashes, and hyphens.

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

Do not use periods after abbreviations.

Never use the pound sign (#) or the percent symbol (%) within an address because it causes a problem with the Banner printing function.

The ampersand (&) should never be used in place of “and.”

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

**5.F.2. Street Names**

Street names should be spelled out in their entirety.

<u>Correct:</u>	<u>Incorrect:</u>
Reservoir Rd	Resvr Rd    Resvr Road ('Road' is a street <b>suffix</b> )
Interstate 5	I 5            I 5

Use numbers for numbered streets and include 'st', 'nd', 'rd', or 'th'.

4415 101st St  
1901 23rd Ave

County Roads and Rural Routes are used in many different ways by different counties. They can be used as both a street name and as a street suffix. They should be entered exactly as the person originally requests or abbreviated appropriately if there is insufficient space for full entry:

<u>Correct:</u>	<u>Incorrect:</u>
WCR 14	Weld Cty Road 14
Weld County Rd 14	Weld County Road 14
CR 14	County Road 14
County Rd 14	Cnty Rd 14
Rural Rt 14	Rural Route 14
RR 14	Rur Route 14
SCR 14	South County Road 14

Highways, Turnpikes, Freeways, Expressways and Parkways may also be used either as a street name or as a suffix. These should be entered exactly as the person originally requests or abbreviated appropriately if there is insufficient space for full entry.

<u>Correct:</u>	<u>Incorrect:</u>
2200 Highway 50	2200 H 50
2200 Hwy 50	2200 Hiwy 50
523 Parkway Rd	523 Pkwy Rd
523 Green Parkway	
523 Green Pkwy	
6710 Coastal Freeway	
6710 Coastal Fwy	

**5.F.3. Street Suffixes**

Common street suffixes are identified in Appendix C.3. These common street suffixes should always be abbreviated as shown in the Appendix.

123 Magnolia St                      1401 Main Ave

Uncommon street suffixes such as Terrace, Corner, or Estate should be spelled out in entirety.

**5.F.4. Secondary 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. Abbreviate all secondary unit designators using the standard abbreviations in Appendix C.3.

102 Main St Apt 101  
 1356 Executive Dr Ste 202  
 1600 Central Pl Bldg 14  
 55 Sylvan Blvd Rm 108

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

Apt C  
 5800 Springfield Gardens Cir

**5.F.5. Compass Directionals**

If appropriate, compass directional words should be abbreviated at the beginning and/or end of the street name. Directional words between the street name and the street suffix are part of the street name and should be spelled out.

1100 S Key West Dr  
 8912 E Mason South Ct

Two directional words appearing consecutively before or after the street name should be abbreviated as one directional, except for combinations of north-south or east-west. In these cases, if they appear before the street name the second directional is part of the street name and should be spelled out. If they appear after the street name the first directional is part of the street name and should be spelled out.

E Main St  
 Bay Ave SW

**5.F.6. P.O. Boxes**

Do not use periods when entering a post office box address. The correct format is:

PO Box 1234

**5.F.7. Dual Addresses**

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

Street Line 1:	Evergreen Bldg
Street Line 2:	1379 W Mississippi Ave
Street Line 3:	PO Box 2351

**5.F.8. Campus Addresses**

Campus address type (CA) is used only for University employees. The purpose for this address type is to identify each employee's home department. The campus address for employees working for more than one area should be the primary or "home" department for the employee. This is the address to which the employee prefers to have his/her pay advices, employment related correspondence, etc. sent.

For University campus addresses, street line 1 should provide the home department name. Street line 2 should provide the building and room number, and street line 3 should provide the campus box number.

Name:	Name of Employee
Street Line 1:	University Department Name
Street Line 2:	Building and Room Number
Street Line 3:	Campus Box #
City:	Greeley
State:	CO
ZIP:	80639

**5.F.9. Student On-Campus Housing Addresses**

Student On-Campus Housing addresses should use the mailing address type “HO” . These addresses should follow the recommended U.S. Postal Service address format shown below:

Name:	Name of Student
Street Line 1:	University of Northern Colorado
Street Line 2:	Name of Building and Room Number
Street Line 3:	Campus (To be used for sorting, etc.)
City:	Greeley
State:	CO
ZIP:	80639

**5.G. City**

Banner is configured to automatically enter the city name when a zip code is entered (“GTVZIPC”). **This is the preferred method of entering the city name.** If more than one city is listed for the zip code entered, the correct city should be selected from the drop-down list. If the city does not appear on the list and the zip code has been verified to be correct, the information for the city may be entered by typing the correct city in the city field. If the preferred name that defaults is not correct, it is acceptable to change the city to the actual city name. If it is necessary to manually type in the city name, use normal upper- and lower-case format and spell out the name in its entirety. Do not abbreviate.

West Stockbridge	Colorado Springs
Fort Collins	Glenwood Springs

**5.H. State or 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 on the state code validation table (“STVSTAT”). The authoritative source for these codes is the Postal Service Address Standards publication. Information from this source is periodically updated by Information Technology Services into the Banner System.

Canadian addresses must include the city in the city field and the province in the state or province field. Canadian provinces include Alberta, British Columbia, Manitoba, New Brunswick, Newfoundland, Northwest Territories, Nova Scotia, Ontario, Prince Edward Island, Quebec, Saskatchewan and Yukon. Canadian provinces have their own code for entry into the state field.

International state and provinces (excluding Canada) are entered in the city field, NOT in the state or province field. The State or Province field should be blank for all international addresses excluding Canada.

See the “Validation Table Dictionary” for additional information regarding validation table:

**STVSTAT - State or Province Codes.**

**5.I. 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.

The authoritative source for these codes is the Postal Service Address Standards publication. Information from this source is periodically updated by Information Technology Services into the Banner System validation table “GTVZIPC.”

A hyphen must be entered when the entire 9-digit 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.

97203	97203-4798
-------	------------

For Canadian addresses enter the six-character postal code by keying in three characters, a space and the last three characters.

T2T 2Y5	R2L 1N4
---------	---------

See the “Validation Table Dictionary” for additional information regarding validation table:

**GTVZIPC - Zip Codes.**

## 5.J. County

A county code is required for all State of Colorado addresses. In those cases where it is undesirable to have the county code print on correspondence, county information can be suppressed by the various letter writing, population selection and check printing software utilized by Banner.

County codes are listed on the “STVCNTY” validation table. The authoritative source for these codes is the Postal Service Address Standards publication. Information from this source is periodically updated by Information Technology Services into the Banner System.

See the “Validation Table Dictionary” for additional information regarding validation table:

**STVCNTY - County codes.**

## 5.K. Nation

A nation code from “STVNATN” is required for all non-U.S. addresses. DO NOT enter a nation code for U.S. Addresses.

Use the Nation Validation Codes from “STVNATN” to enter nation or country codes. The authoritative source for the Banner System is the FIPS - Federal Information Processing Standard. These standard codes are provided by the United States Post Office and are periodically updated by Information Technology Services into the Banner System.

[http://www.upu.int/post\\_code/en/addressing.html](http://www.upu.int/post_code/en/addressing.html)

See the “Validation Table Dictionary” for additional information regarding validation table:

**STVNATN – Nation Codes.**

## 5.L. International Addresses

Use the Nation Validation codes to enter nation or country codes (“STVNATN”). The authoritative source for the Banner System is the FIPS - Federal Information Processing Standard. These standard codes are provided by the United States Post Office and are periodically updated by Information Technology Services into the Banner System.

[http://www.upu.int/post\\_code/en/addressing.html](http://www.upu.int/post_code/en/addressing.html)

Enter an international address into the address fields exactly as provided, including punctuation. Try to avoid commas, however, as much as possible. Do not abbreviate words that are spelled out. If available, the postal code should be entered in the zip/postal code field.

Care should be taken to enter international addresses as closely as possible to the format required by that country. The country name appears automatically when a nation code is entered. The city field is required, and three address lines are available.

1501-203 Kunyoung Villa	(address 1)
Dae-Wha Dong	(address 2)
Zi-San Ky Kyungido	(city)
South Korea	(nation)

In some cases, postal code and city should be inserted in the city field.

27, rue Pasteur	(address 1)
14390 Cabourg	(city)
France	(nation)

In other cases, the city alone should appear in the city field.

49 Featherstone Street	(address 1)
London	(city)
EC1Y 8SY	(zip)
Great Britain	(nation)

See the “Validation Table Dictionary” for additional information regarding validation table:

**STVNATN – Nation Codes.**

### 5.M. Military Addresses

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.

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

SGT Mario Martian Unit 2050 Box 4190 APO AP 96522-1215	Sgt Cher Downey PSC 802 Box 2625 APO AE 90777-0010
Seaman Duane Reeves Division SS North Dakota PO AA 34093-2344	

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

Col Margaret Henry Lowry Air Force Base 8205 E 6th Ave 405 Denver CO 80234	Capt Jack Harris 2314 Barracks St Minot AFB ND 58705
---	--

### 5.N. Telephone Type/Telephone

Telephone type/telephone fields are entered via the telephone form. See Section 6.

### 5.O. Inactivate Indicator

The inactivate indicator should be used when an address is no longer valid. The date field must be entered when inactivating an address.

### 5.P. Delivery Point/Corrective Digit/Carrier Route

The delivery point/corrective digit/carrier route fields are not used by the University.

### 5.Q. Validation Tables

See the “Validation Table Dictionary” for additional information regarding the following address related validation tables:

<b>STVATYP -Address Types</b>	<b>STVSTAT – State/Province Codes</b>	<b>GTVZIPC – Zip/Postal Codes</b>
<b>STVCNTY-County Codes</b>	<b>STVNATN – Nation Codes</b>	<b>STVTELE – Telephone Types</b>
<b>STVASRC – Address Source Codes</b>		

### 5.R. Summary

- ∞ All address information should be entered in normal upper- and lower-case format.
- ∞ Do not use special characters (ex. &, %, #, etc.) in any address fields.
- ∞ Only use periods, slashes, and hyphens in the street number (39.2 Rd).
- ∞ Use *st*, *nd*, *rd*, and *th* on numbered street names. (23rd Ave).
- ∞ Abbreviate street suffixes, unit designators, and compass directional’s using standard abbreviations (St, Ave, Rd)
- ∞ Only University employees should have a campus address (CA).
- ∞ City, state, county, and nation codes are populated automatically when entering a zip code.
- ∞ If necessary to manually enter a city name, spell it out in its entirety.
- ∞ Enter international addresses exactly as shown (three address lines available for use).
- ∞ International state and provinces (excluding Canada) are entered into the city field.
- ∞ Military addresses must include and APO or FPO designation along with the appropriate State and Zip codes.

## 6. Telephone Information

### 6.A. 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.

Telephone numbers are added and/or changed on the Banner Telephone information form: **SPATELE**.

All regional and local telephone numbers, including on-campus phone numbers, are entered using the ten-digit format. This ten-digit number is entered into the Area Code, Phone number and Extension fields.

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.

Telephone numbers are displayed on Address forms, but are not stored with the address in the Banner tables.

### 6.B. Telephone Type

See the “Validation Table Dictionary” for additional information regarding validation table:

**STVTELE - Telephone Type Codes.**

### 6.C. Telephone Numbers

The telephone number is entered into “SPATELE” using three separate entry fields as noted below:

#### 6.C.1. Area Code

The three-digit area code must be entered for all phone numbers including the local (970) area.

#### 6.C.2. Phone Number

Enter the seven-digit number without inserting a hyphen.

3341756

#### 6.C.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.**

5961

1764

### 6.D. Primary/Unlisted/Inactive Indicators

The primary indicator is set for a telephone number that is the primary contact for the entity.

The unlisted indicator is set for a telephone number that is designated as unlisted.

The inactive indicator is set for a telephone number that is no longer valid.

## 6.E. International Access

### 6.E.1. International Telephone Numbers

International telephone numbers consist of four to seven digits

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

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

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.

Example:

**Student Supplied**

Country Code: 3741  
Number: 55-3984

**Banner Entry**

City Code: 3741 (international access code)  
553984 (phone number)

Country Code: 886  
City Code: 7  
Number: 236-2315

8867 (international access code)  
2362315 (phone number)

### 6.E.2. North American Numbering Plan (NANP)

The North American Numbering Plan (NANP) agreement held among many North American countries establishes a procedure for dialing international numbers similar to traditional United States dialing procedures. The country code for all NANP countries is 1. Countries that are members of the NANP can be dialed using 1 plus the three digit area code. Any phone numbers from NANP countries can be entered in the domestic phone number field in the Banner system.

Mexico is not a member of NANP. See Appendix C.4. for the listing of countries and area codes in the NANP.

## 6.F. Comment

The comment field is available for use for any comments about the associated telephone information.

## 6.G. Address Type

Telephone type codes may be associated with a specific address type code.

## 6.H. Sequence

The sequence field is automatically populated by Banner.

## 6.I. Validation Tables

See the “Validation Table Dictionary” for additional information regarding the following validation tables:

**STVTELE – Telephone Type Codes.**  
**STVATYP – Address Type Codes**

## 7. Biographical Information

### 7.A. Gender

**A Gender Code is required for all University employees and students.**

This information is maintained for federal and state reporting purposes.

### 7.B. Birth Date

**A date of birth is required for all University employees and students.**

A copy of the birth certificate, passport, or driver's license must be provided with all birth date change requests.

The Human Resources Office may enter and/or change faculty and staff birth date information.

The Registrar's Office may enter and/or change student birth date information.

See Appendix D.1. for standards for entering calendar dates.

### 7.C. Age

The age field is automatically calculated by Banner.

### 7.D. Social Security Numbers (SSN) and Taxpayer Identification Numbers (TIN)

A U.S. SSN should be entered into the SSN/TIN field for "persons" and a TIN should be entered into the SSN/TIN field for "Non-Persons."

The entire 9-digit SSN or TIN number should be entered into this field. Dashes and spaces between numbers should be omitted (e.g. 123456789).

A SSN is required for all University employees and independent contractors.

While it is preferable that students disclose their SSN, a SSN is required only for students applying for financial aid, employment, or the College Opportunity Fund. A SSN is an optional data element for all other constituents of the University.

A person must present a copy of his or her Social Security card in order to have his/her SSN or legal name changed within Banner.

The Human Resources Office may enter and/or change faculty and staff SSN information.

The Registrar's Office may enter and/or change student SSN information.

The Purchasing Office may enter and/or change TIN information.

### 7.E. Confidential Indicator

The confidential indicator field is used for students who do not want directory information released.

### 7.F. Deceased Indicator/Date

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

Due to the sensitivity of this issue, prompt attention is important so future mailings from University offices are discontinued. The deceased status indicator and date may only be changed upon receipt of documented and verified information, not just perceived information. An annual review and end dating of addresses for deceased persons will be conducted.

The Dean of Students Office is responsible for maintenance of this field for students.

Human Resources is responsible for maintenance of this field for employees.

## 7.G. Citizenship

**A citizenship code is required for students and employees.**

For all other “Person” entries into the Banner system, this field may be populated or left blank to indicate that U.S. citizenship is not known.

Citizenship information is used in IPEDS ethnic reporting for institutional research.

See the “Validation Table Dictionary” for additional information regarding validation table:

**STVCITZ - Citizenship Codes.**

## 7.H. Ethnicity

**An ethnic code is required for all University employees and students.**

“Does not wish to provide” is an acceptable code.

Ethnicity is tracked for purposes of federal and state reporting requirements for United States citizens only.

One of the six IPED’s required ethnicity codes **MUST** be entered for students and employees who are U.S. citizens or U.S. permanent residents:

African American	Native American	Asian American
Hispanic	Caucasian	“Does Not Wish to Provide”

The University does not track the ethnicity status of international students and employees who are not U.S. citizens or U.S. permanent residents. The status of “non-resident alien” is available for these persons; however, this field is **NOT** required for international students or employees.

To accommodate persons with multiple ethnic classifications, a primary ethnic code should be entered in the ethnicity field. Any additional ethnicities should be entered as a separate comment on the “Banner Comment” form.

See the “Validation Table Dictionary” for additional information regarding the following validation tables:

**STVETHN - Ethnic Codes**  
**STVETEC - IPEDS Ethnic Codes**

## 7.I. Marital Status

**A marital status code is required for all University employees.**

A copy of a marriage license or a divorce decree must be provided with all marital status change requests.

The Human Resources Office may enter and/or change employee marital status information.

See the “Validation Table Dictionary” for additional information regarding validation table:

**STVMRTL - Marital Codes.**

## 7.J. Religion

The University **WILL NOT** maintain religion data in the Banner system.

## 7.K. Legacy

The University **WILL NOT** maintain legacy data in the Banner system.

## **7.L. Veteran Information**

### **7.L.1. Veteran File Number**

Veteran information is only collected and maintained for regular employees by Human Resources.

### **7.L.2. Veteran Category**

See the “Validation Table Dictionary” for additional information regarding validation table:

**STVVETC - Veteran Category Codes.**

### **7.L.3. Active Duty Separation Date**

The active duty separation date field is used to enter the date that students and/or employees separate from the University because they are called to active duty in the military.

The Human Resources Office may enter and/or change employee active duty separation dates.

The Dean of Students Office may enter and/or change student active duty separation dates.

### **7.L.4. Special Disabled Veteran Indicator**

The special disabled veteran indicator is used by Human Resources only.

The Human Resources Office may enter and/or change the employee special disabled veteran indicator.

## **7.M. Validation Tables**

See the “Validation Table Dictionary” for additional information regarding the following miscellaneous Student Module “Person” validation tables:

**STVCITZ – Citizen Type Codes**

**STVETEC – IPEDS Ethnic Codes**

**STVRELG – Religion Codes**

**STVVETC – Veteran Category Codes**

**STVETHN – Ethnic Codes**

**STVMRTL – Marital Status Codes**

**STVLGCY – Legacy Codes**

## 8. E-mail Information

### 8.A. General

“Persons” or “Non-Persons” may have multiple e-mail addresses within the Banner system. E-mail addresses should be accurate and reflect the most recent data received.

University e-mail correspondence to students and employees will be sent **only to University assigned e-mail addresses**.

Unless making a correction due to an initial entry error, do not change or delete the prior e-mail address.

When adding a subsequent e-mail address of the same type, the prior e-mail address should be end dated and the new e-mail address added.

### 8.B. E-mail Addresses

E-mail addresses follow a standard format. E-mail addresses consist of a log-in name followed by the “@” sign, followed by the domain name.

A domain name contains between two and four elements separated by periods. For example [admissions.help@unco.edu](mailto:admissions.help@unco.edu) is the address where University admissions questions can be sent.

Please refer to the University’s e-mail policy for details regarding University e-mail accounts.

### 8.C. Comment

The comment field is available for any comments about the associated e-mail address information.

### 8.D. Validation Tables

See the “Validation Table Dictionary” for additional information regarding validation table:

**GTVEMAL – Email Address Type Codes.**

## 9. Emergency Contact Information

### 9.A. General

The general form is used to enter emergency contact information for persons.

### 9.B. Priority

A priority number is a number assigned for persons with more than one emergency contact.

### 9.C. Contact Name

See Section 4.

### 9.D. Relationship

The relationship field reflects the relationship of the emergency contact to the person.

### 9.E. Address

See Sections 5.

### 9.F. Telephone

See Section 6.

### 9.G. Validation Tables

See the “Validation Table Dictionary” for additional information regarding the emergency contact validation table:

**STVRELT – Relation Code**

**Appendix A.1.**  
**Individual Change Request Form**

Personal information provided on this form is **confidential**.  
 Completed forms should not be reproduced or electronically transmitted without encryption  
 All hard copies of completed forms should be securely stored

**Print Legibly AND attach appropriate Documentation**  
 Complete only the sections that require changes

Bear #:  Mark all that apply:  Student  Faculty  Staff  Vendor  
 Does person requesting change have a Banner User ID?  Yes  No  Unknown

**Changes REQUIRING Documentation** (Acceptable documentation includes original or copy of one of the following: Social Security Card, Birth Certificate, Marriage License, Passport, Citizenship Papers, Court Document and Drivers License)

Name Change: Previous Name      
 Last First Middle Preferred First Name

Current Name     Last

Marital Status:  Married  Single  Divorced  Widowed  Separated  
 Single w/dependents  Life Partner

Birth Date (Month/Day/Year):  Gender:  Male  Female

**Changes NOT Requiring Documentation**

Current Address:  Mailing  Parent  Permanent  Purchasing  Business  
 Employee-Campus  Emergency Contact  Business Billing

Street PO

City State Zip

Current Telephone:  Home  Parent  Permanent  Purchasing  Business  
 Employee-Campus  Emergency Contact

Telephone # (include Area Code)

Ethnicity:  Hispanic  Caucasian  Native American  African American  Asian/Pacific Islander  
 Multiple Ethnicity   Do not wish to provide

I assume responsibility for all consequences that may occur as a result of these changes. There is no intent on my part to defraud the Univ of Northern Colorado.

Signature:  Date:

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

- ∞ Undergraduate Students **BEFORE** enrollment: Admissions Office, Carter 3006, Campus Box 10, Greeley, CO 80639, FAX 970-351-2984
- ∞ Graduate & International Students **BEFORE** enrollment: Graduate School, Carter 2007, Campus Box 135, Greeley, CO 80639, FAX 970-351-2371
- ∞ All Students & Student Employees **AFTER** enrollment: Registrar, Carter 3002, Campus Box 50, Greeley, CO 80639, FAX 970-351-1870
- ∞ Non-Student employees: Human Resources, Carter 2002, Campus Box 54, Greeley, CO 80639, FAX 970-351-1386
- ∞ "Person" Vendors who are not and have never been students and/or employees: Purchasing, Carter 1002, Greeley, CO 80639, FAX 970-351-1142
- ∞ "Non-Person" Vendors: DO NOT USE THIS FORM – Use the "Non-Person" Vendor Change Request Form.

<b>FOR OFFICE USE ONLY</b>	<b>Change Made by (Employee Name):</b>	<b>Data Steward Dept:</b>	<b>Date of Change:</b>
<b>Entered into Banner form:</b> <input type="checkbox"/> SPAIDEN <input type="checkbox"/> PPAIDEN	<input type="text"/>	<input type="text"/>	<input type="text"/>

Approved by Project Mgmt Team 3-24-2006; Revised 8-28-2006



**Appendix A.3.**

**Vendor "Non-Person" Change Request Form**

Personal information provided on this form is confidential.  
 Completed forms should not be reproduced or electronically transmitted without encryption  
 All hard copies of completed forms should be securely stored  
**PRINT legibly and Attach to W-9 form for processing**

Request Date:  Entry Date:

Request made by:

Action Requested:  Change "Non-Person" Vendor  Terminate "Non-Person" Vendor Services

Assigned Bear Number:

**"Non-Person" Vendor Name:**

Previous Legal Name:

Correct Legal Name:

**Other Name Types:**

Correct "Alias" Name:

Correct "Doing Business As" (DBA) Name:

Correct "Doing Business As" (DBA) Bear ID #:

**Address/Phone Number Change:**

Correct Address Type:

Correct Street Line 1:

Correct Street Line 2:

Correct Street Line 3:

Correct City:

Correct State:  Correct Zip Code:

Correct Phone #:  Correct Fax #:

**Taxpayer Identification Change/Correction:**

*Do Not make changes to "Person" Social Security Numbers with this form. Use the "Social Security Number Change Request Form"*

Correct TIN: -- Incorrect TIN: --

I assume responsibility for all consequences that may occur as a result of these changes. There is no intent on my part to defraud the University of Northern Colorado.

Signature:  Date:

Return this form, with proper W-9 Form documentation to the Accounts Payable/Purchasing office.

**FOR OFFICE USE ONLY**

Entered into Banner form:	Change Made by:	Data Steward Dept:	Date of Change:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Approved by Project Mgmt Team 3-24-2006; Revised 8-28-2006

**Appendix A.4.**  
***“Person” and “Non-Person” Vendor Create Form***

**Personal information provided on this form is confidential.**  
**Completed forms should not be reproduced or electronically transmitted without encryption**  
**All hard copies of completed forms should be securely stored**  
**Check GUASYST & Common Matching to ensure that this “Vendor” is not already a Student, Employee and/or Vendor in Banner**  
**PRINT legibly and Attach to W-9 form for processing**

Action Requested:  Setup New “Person” Vendor\*\*       Setup New “Non-Person” Vendor\*\*\*

Request made by:       Request Date:

Submission Date:       Banner Entry Date:

Vendor Start Date (only if needed prior to entry date)

A Bear Number has previously been assigned to this Vendor:       Yes     No

If Yes - Existing Bear Number

If No – Banner Generated Bear Number after creation of Vendor

Legal Name\*

Vendor uses a DBA (Doing Business As) or an Alias Name       Yes     No     Both

DBA Name       DBA Bear ID#

Alias Name       (Bear Numbers not assigned to Alias Names)

“Person” Vendors: Social Security Number (SSN)\*

“Non-Person” Vendors: Taxpayer Identification Number (TIN)\*

1099 Reportable  Yes     No      Type of Income

Vendor Type       Discount Code

Address Type       Default Addr Type

Check Name       Check Name

Address Line 1:       Address Line 1

    Line 2:       Line 2:

    Line 3:       Line 3:

    City:       City:

    State:       State:

    Zip:       Zip:

    Phone:       Phone:

    FAX:       FAX:

Contact Person:       Other:

- “Person” Vendors are individuals, who use a Social Security Number for Tax purposes.
  - “Non-Person” Vendors are Corporations, Partnerships and LLC’s that use a Taxpayer Identification number for Tax purposes.
- Approved by Project Mgmt Team 3-24-2006; Revised 8-28-2006

**Appendix A.5.**  
***BANNER Oracle USER\_NAME ID CHANGE FORM***

**Employees Only – Requires copy of Individual Change Request form and a copy of supporting documentation**

Employee BEAR ID Number \_\_\_\_\_ Employee office telephone number \_\_\_\_\_

**STEP 1 – Change Employee Name in the Banner System.** Employee must submit completed *Individual Change Request Form*

Employee’s Revised Name: \_\_\_\_\_ Employee’s Previous Name: \_\_\_\_\_

Revised Last Name: \_\_\_\_\_ Previous Last Name: \_\_\_\_\_

Revised First Name: \_\_\_\_\_ Previous First Name: \_\_\_\_\_

Revised Middle Name: \_\_\_\_\_ Previous Middle Name: \_\_\_\_\_

Employee’s Name Revised using Banner form: \_\_\_\_\_ PPAIDEN \_\_\_\_\_ SPAIDEN  
(Current NonStudent Employees) (Current Student Employee)

Name Change Completed by: \_\_\_\_\_ Date: \_\_\_\_\_  
(Print name of employee who completed name change in PPAIDEN or SPAIDEN)

Forward this original form to the Human Resources office for filing. Attach a copy of the Individual Change Request Form completed by the employee and a copy of the supporting documentation provided by the employee. Valid documentation includes: **Birth Certificate, Court Document, Social Security Card, Passport, Citizenship Papers, or Marriage Certificate.**

*Fax a copy of this form without attachments to the Technical Support Center (TSC): FAX 970-351-3159*

**STEP 2 – TSC Creates New Oracle USER\_NAME, Inactivates Previous Oracle USER\_NAME, and initiates the email address change process.**

Employee’s New USER\_NAME: \_\_\_\_\_ (Create New Oracle USER\_NAME)

Employee’s Prior USER\_NAME: \_\_\_\_\_ (Inactivate Previous Oracle USER\_NAME)

Oracle USER\_NAME Changed by: \_\_\_\_\_ Date: \_\_\_\_\_  
(Print name of employee(s) who created New and Inactivated Previous Oracle USER\_NAME)

Email address change process initiated by: \_\_\_\_\_ Date: \_\_\_\_\_  
(Print name of employee initiating email address change)

*Fax or forward this form copy to the Finance Office: Carter 1002, Campus Box 44, FAX 970-351-1142*

**STEP 3 – Finance Office: Finance Fund/Org Security removed from Prior USER\_NAME and Added to New USER\_NAME:**  
(Finance Fund/Org Security must be changed on FOMUSOR, FOMUSFN, FTMFMGR and FOMPROF)

Finance Fund/Org Security:  
Removed from **previous** USER\_NAME by: \_\_\_\_\_ Date: \_\_\_\_\_

Added to **new** USER\_NAME by: \_\_\_\_\_ Date: \_\_\_\_\_  
(Print name of employee(s) who changed Finance Fund/Org security)

*Fax or Forward this form copy to the Payroll Office: Carter 2005, Campus Box 5, FAX 970-351-2852*

**STEP 4 – Payroll Office: Payroll Org Security removed from Prior USER\_NAME and Added to New USER\_NAME:**  
(Payroll Org Security must be changed on PSAORGN, PTRUSER, and GOAEACC)

Payroll Org Security:  
Removed from **previous** USER\_NAME by: \_\_\_\_\_ Date: \_\_\_\_\_

Added to **new** USER\_NAME by: \_\_\_\_\_ Date: \_\_\_\_\_  
(Print Name of employee(s) changing Payroll Org Security)

Employee notified that USER\_NAME change complete by: \_\_\_\_\_ Date: \_\_\_\_\_  
(Print Name of employee notifying employee of change)

*Forward this form copy to the Human Resources office to be filed with the original form and attachments.*

## ***BANNER Oracle USER\_NAME ID CHANGE FORM – Instructions***

Changing an active employee's Banner user name is sometimes necessary due to marriage, divorce, legal name changes, etc. This process is complicated and must be completed in proper order using valid documentation. The steps for completing a Banner user name change for both non-student employees and student employees are as follows:

- A. The employee must:
  1. Complete an "Individual Change Request" form and provide proper documentation for the change;
  2. Complete a "Banner USER\_NAME Change" form;
  3. These forms and valid documentation are then submitted as follows:
    - a. Non-student employees' documents are submitted to the Human Resources office.
    - b. Student employees' documents are submitted to the Registrar's Office.
- B. The Human Resources Office or Registrar's Office then:
  1. Verifies that the change should be processed from the completed "Individual Change Request" form and documentation.
  2. The employee's name is then changed using the appropriate Banner form: "PPAIDEN" or "SPAIDEN." This completes the Banner identifying information change but does not change the employee's Banner user name.
  3. The original "Individual Change Request" form is then signed and dated by the employee who made the name change to the Banner System.
  4. A copy of the "Individual Change Request" form is then attached to the original "Banner USER\_NAME Change" form.
  5. The original "Individual Change Request" form is kept in the Human Resources Office or the Registrar's Office to document that the name change was completed in the Banner System.
  6. The "Banner USER\_NAME Change" form plus the copy of the "Individual Change Request" form is then faxed to the TSC.
  7. The original "Banner USER\_NAME Change" form plus a copy of the "Individual Change Request" form is then securely filed in the Human Resources Office for both Student employees and Non-student employees.
- C. The Technical Support Center (TSC) then:
  1. Creates the new Banner user name to match the employee's revised name.
  2. Initiates the processes necessary to revise the employee's University email address.
  3. Removes the Banner security access for the security classes assigned to the employee's previous Banner user name.
  4. Reassigns the identical Banner security access to the employee's new user name.
  5. Inactivates the employee's previous user name.
  6. The TSC employee who completes this process then signs and dates the faxed copy of the "Banner USER\_NAME Change" form.
  7. The copy of the "Banner USER\_NAME Change" form plus the copy of the "Individual Change Request" form is faxed to the Finance Office
  8. The copy of the "Banner USER\_NAME Change" form plus the copy of the "Individual Change Request" form is then securely filed within the TSC files.
- D. The Finance Office then:
  1. Removes the employee's finance fund and org security access that was assigned under the previous Banner user name using Banner forms: "FOMUSOR", "FOMUSFN", "FTMFMGR", and "FOMPROF."
  2. Reinstates the employee's finance fund and org security access that was assigned under the previous Banner user name to the new Banner user name using Banner forms: "FOMUSOR", "FOMUSFN", "FTMFMGR", and "FOMPROF."
  3. The Finance employee who completes this process then signs and dates the original "Banner USER\_NAME Change" form.
  4. The copy of the "Banner USER\_NAME Change" form plus the copy of the "Individual Change Request" form is then faxed to the Payroll Office.
  5. The copy of the "Banner USER\_NAME Change" form plus the copy of the "Individual Change Request" form is then securely filed within the Finance Office's files.
- E. The Payroll Office then:
  1. Removes the employee's payroll org security access that was assigned under the previous Banner user name using Banner forms: "PSAORGN", "PTRUSER" and "GOAEACC."
  2. Reinstates the employee's payroll org security access that was assigned under the previous Banner user name to the new Banner user name using Banner forms: "PSAORGN", "PTRUSER" and "GOAEACC."
  3. The Payroll employee who completes this process signs and dates the original "Banner USER\_NAME Change" form.
  4. The copy of the "Banner USER\_NAME Change" form plus the copy of the "Individual Change Request" form is then forwarded to the Human Resources office and securely filed with the original documents.



Forward this form to the Financial Aid Data Steward, Campus Box 33.

**BANNER Multiple PIDM Correction** -Page 2 of 2 Incorrect Last Name: \_\_\_\_\_ Incorrect Bear #: \_\_\_\_\_

**Data Steward Multiple PIDM correction and Information Technology authorization processes:**

(Continued from Page 1 and Forwarded from Registrar data steward)

**Financial Aid Data Steward:**

Using standard Banner processes, all information possible has been moved or removed from the Incorrect PIDM. \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ NA

If Yes, **AND** the incorrect PIDM has **ONLY** a Financial Aid role **AND** the student has not yet received any Financial Aid, Information Technology services is authorized to purge all remaining data from the Incorrect PIDM. \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ NA

Do any of the affected individuals need to be notified of a Bear ID # change? \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ NA

Authorized Data Steward Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

Forward this form to the Accounts Receivable Data Steward, Campus Box 14.

**Accounts Receivable/Bursar Data Steward:**

Using standard Banner processes, all information possible has been moved or removed from the Incorrect PIDM. \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ NA

Information Technology services is authorized to purge all remaining data from the Incorrect PIDM. **NO - NA for Accounts Receivable**

Do any of the affected individuals need to be notified of a Bear ID # change? **NO - NA for Accounts Receivable**

Authorized Data Steward Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

Forward this form to the Human Resources Data Steward, Campus Box 54

**Human Resources:**

The incorrect Employee Bear ID # has been marked "Inactive" on Human Resources Banner Form PEAEMPL. \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ NA

Using standard Banner processes, all information possible has been moved or removed from the Incorrect PIDM. \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ NA

If Yes, **AND** the incorrect PIDM has **ONLY** a Human Resources role **AND** the employee has **NEVER** been paid, Information Technology services is authorized to purge all remaining data from the Incorrect PIDM. \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ NA

Do any of the affected individuals need to be notified of a Bear ID # change? \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ NA

If yes, the individual was notified of the Bear ID # change on \_\_\_\_\_ (date) by \_\_\_\_\_ Telephone \_\_\_\_\_ Email \_\_\_\_\_ Postal Service.

Authorized Data Steward Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

Forward this form to the Payroll Data Steward, Campus Box 5.

**Payroll:**

The incorrect Employee Bear ID # has been marked "Terminated" on Human Resources Banner Form PEAEMPL. \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ NA

Using standard Banner processes, all information possible has been moved or removed from the Incorrect PIDM. \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ NA

Information Technology services is authorized to purge all remaining data from the Incorrect PIDM. **NA for Payroll**

Do any of the affected individuals need to be notified of a Bear ID # change? **NA for Payroll**

Authorized Data Steward Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

Forward this form to the Vendor (AP/Purchasing) Data Steward, Campus Box 61

**Vendor (AP/Purchasing):**

The incorrect Vendor Bear ID # has been marked "Terminated" on Banner Vendor Form FTMVEND. \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ NA

Using standard Banner processes, all information possible has been moved or removed from the Incorrect PIDM. \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ NA

If Yes, **AND** the incorrect PIDM has **ONLY** a Vendor role **AND** the Vendor has **NEVER** been paid, Information Technology services is authorized to purge all remaining data from the Incorrect PIDM. \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ NA

Do any of the affected individuals need to be notified of a Bear ID # change? \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ NA

If yes, the individual was notified of the Bear ID # change on \_\_\_\_\_ (date) by \_\_\_\_\_ Telephone \_\_\_\_\_ Email \_\_\_\_\_ Postal Service.

Authorized Data Steward Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

Forward this form to Information Technology Services, Campus Box 19

**To be completed by Information Technology Data Base Administrator:**

Check GUASYST to ensure that the Data Steward for EVERY role has completed the required steps and signed this form. \_\_\_\_\_ Yes \_\_\_\_\_ No

The incorrect PIDM does not have ANY data other than a "DO NOT USE" name and a Multiple PIDM Hold record \_\_\_\_\_ Yes \_\_\_\_\_ No

**If yes, AND AUTHORIZED BY THE ABOVE DATA STEWARDS**, the incorrect PIDM has been purged. \_\_\_\_\_ Yes \_\_\_\_\_ No

Authorized IT Data Base Administrator Name: \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

Securely file completed form in Information Technology Services office and present to Multiple PIDM committee as requested. Form revised 10-9-2006

## ***BANNER Multiple PIDM Correction Form Instructions***

A unique PIDM (Person Identification Master) number is assigned by the Banner System to connect all data that is associated with each "Person" and "Non-Person" record maintained in the Banner System. These unique, Banner System generated PIDM numbers cannot be accessed or changed by functional area Banner users. Only authorized Information Technology Data Base Administrators can access or make any non-system generated changes to a Banner PIDM.

Occasionally in error, multiple Banner PIDMs are created for a single "Person" or "Non-Person" in the Banner System. When this occurs, the multiple information records created cannot be accurately stored or retrieved by the Banner System.

To avoid creating a multiple PIDM, a thorough search must be conducted by authorized personnel before creating a new "Person" or "Non-Person" record in the Banner System. This search is conducted using the Banner form "GOAMTCH."

Common matching is set up to search on the following criteria:

"Persons":	First Name	Middle Name	Last Name	Date of Birth	SSN
"Non-Persons":	Non-Person Name				TIN

If a Social Security Number (SSN) or Taxpayer Identification Number (TIN) is provided by a student, employee or vendor, it should always be used during the common matching process to make sure that no other records have been created in the Banner system previously using the same SSN or TIN.

Despite the careful use of "Common Matching," multiple PIDMs are still occasionally created in error. Eliminating each multiple PIDM requires a planned and continuing coordinated effort by the Multiple PIDM "Clean-Up" committee. This committee is made up of key Banner Module users from the various Banner modules: Finance, Student, Financial Aid, and Human Resources.

Members of the Multiple PIDM "Clean-Up" Team regularly review Multiple PIDMs that have been created to determine which PIDM to maintain and which PIDM to eliminate using the following procedures:

1. The Banner roles (admissions, general student, registration, vendor, financial aid applicant, employee, etc.) assigned to each PIDM are determined using the Banner form "GUASYST."
2. A PIDM with registered student, financial aid, accounts receivable and/or employee roles will generally have precedence over a PIDM with only admissions or vendor roles.

Once the correct PIDM for continued use is identified, the incorrect PIDM is restricted from further use by the following procedures:

1. The words "DO NOT USE" should be entered at the end of the last name in the last name field for the PIDM that should no longer be used. This change should be made to "SPAIDEN", "PPAIDEN" or "FOAIDEN" as appropriate. This alerts users not to use the record. The name of the employee completing this step and the date of completion should be documented on the Multiple PIDM Correction Form."
2. Use the Multiple PIDM Hold Code 90 on the SOAHOLD form to put a "Hold" on the incorrect PIDM. This prevents further transactions from being processed against the incorrect PIDM record. The name of the employee completing this step and the date of completion should also be documented on the "Multiple PIDM Correction Form."
3. If necessary, the student, employee or vendor affected by the Multiple PIDM is notified of the correct Banner Bear Number that they should use.
4. All information that can be manually removed from an incorrect PIDM using standard Banner Processes should be removed by Banner Functional Area employees. If appropriate, this information should be manually reentered into the correct PIDM. The name of the employee(s) completing this step and the dates of completion should also be documented on the "Multiple PIDM Correction Form."
5. After the data base administrators have removed as much information as possible from the incorrect PIDM using standard Banner processes, it may be possible to purge any remaining information (such as "name") assigned to the incorrect PIDM and then purge the PIDM.
  - a. It is generally only possible to purge an incorrect PIDM if it has only a single role in the Banner system according to GUASYST.
  - b. The incorrect PIDM may only be purged from the Banner System by an authorized Information Technology Data Base administrator with the approval of each data steward as documented on the "Multiple PIDM Correction Form."
6. Some information cannot be manually removed from an incorrect PIDM to the correct PIDM using standard Banner processes. An example of such information would be Accounts Payable Vendor check payment history information. Check payment history cannot be altered by accounts payable or purchasing employees after it has been processed.
  - a. PIDMs with multiple roles in GUASYST and payment or transcript history cannot be purged from the Banner system.
  - b. These incorrect PIDMS will be adequately contained by these procedures.

**Appendix B**  
**SCT Banner Validation Table/Data Standard Change Request Form**  
**For Shared Validation Tables ONLY**  
**See Validation Table Dictionary**

Requestor Name \_\_\_\_\_  
 School or Division \_\_\_\_\_  
 Phone Number \_\_\_\_\_

Validation Table Name \_\_\_\_\_  
 Validation Table Steward \_\_\_\_\_

Mark One:

New Validation Table Code

Change to Validation Table Code

Requested Change to Data Standard (include supporting documentation) \_\_\_\_\_

Requested Change to Validation Table (include supporting documentation) \_\_\_\_\_

Correct/Current Validation Code(s)	Effective Dates	Previous Validation Code (if applicable)	Effective Dates

Approved       Denied

Date Steward      Date      Data Standards Committee Chair      Date

---

Comments:

Approved by Project Mgmt Team 3-24-2006

**Appendix C–Abbreviations and Crosswalk Tables****C.1 Prefixes**

Doctor	Dr
Father	Fr
Governor	Gov
Honorable	Hon
Judge	Judge

Professor	Prof
Rabbi	Rabbi
Representative	Rep
Reverend	Rev
Senator	Sen

**C.2 Suffixes**

Chief Executive Officer	CEO
Chief Financial Officer	CFO
Certified Public Accountant	CPA
Doctor of Chiropractic	DC
Dean	Dean
Dentist	DDS
Doctor of Dental Medicine	DMD
Doctor of Osteopathy	DO

Doctor of Veterinary Medicine	DVM
Doctor of Education	EdD
Esquire	Esq
The Second	II
The Third	III
The Fourth	IV
Juris Doctor	JD
Junior	Jr

Doctor of Laws	LLD
Doctor of Medicine	MD
Doctor of Optometry	OD
Doctor of Philosophy	PhD
Retired	Ret
Registered Nurse	RN
Senior	Sr

**C.3 Address Abbreviations**

Apartment	Apt
Avenue	Ave
Building	Bldg
Boulevard	Blvd
Center	Ctr
Circle	Cir
Court	Ct
County Road	CR
Department	Dept
Drive	Dr
East	E
Floor	Fl
Freeway	Fwy

Highway	Hwy
Lane	Ln
North	N
Northeast	NE
Northwest	NW
Number	Unit
Parkway	Pkwy
Place	Pl
Point	Pt
Road	Rd
Room	Rm
Route	Rt
Rural Route	RR

South	S
Southeast	SE
Southwest	SW
Square	Sq
Street	St
Suite	Ste
Terrace	Ter
Trail	Trl
Turnpike	Tpke
Unit	Unit
Way	Way
West	W
Weld CR	WCR

**C.4 North American Numbering Plan (NANP)**

Country	Area Code
Alberta	403/780
Anguilla	264
Antigua	268
Bahamas	242
Barbados	246
Barbuda	268
Bermuda	441
British Columbia	250/604/778
British Virgin Islands	284
Cayman Islands	345
Dominica	767
Dominican Republic	809
Grenada	473
Guam	671
Jamaica	876
Manitoba	204

Country	Area Code
Montserrat	664
New Brunswick	506
Newfoundland	709
Northern Marianas Islands (Saipan, Rota & Tinian)	671
Nova Scotia	902
Ontario	416/519/647/705/807/905
Puerto Rico	787/939
Quebec	418/450/514/613/819
Saskatchewan	306
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
Yukon, NW Territory, Nunavut	867

## **Appendix D–Miscellaneous**

### **D.1 Calendar Dates**

Date fields appear on forms throughout the Banner system.

Banner is set up to accept dates in the format 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.

Always enter all three parts of calendar dates (month, day, year).

Always enter two digits for the month and day.

Enter January as 01  
Enter the 5<sup>th</sup> day of the month as 05

The default method for entering dates is DD-MON-CCYY (ex. 05-MAR-2002). Use this method if desired or if the shortcut methods do not work.

A date may be entered without separators (no spaces or special characters) or using a dash (-) or slash (/) as separators.

The date March 5, 2006 can be entered in any of the following ways:

03052006      03/05/2006      03-05-2006      05-MAR-2006

In all cases, the date will be stored as: 05-MAR-2006

If only part of the current date is entered, the rest of the current date will default.

Entering a “T” in a date field and pressing “enter”, will enter today’s date as a default.

All four digits are required when completing a query on the date field. For example, enter 26-JUN-2006, not 26-JUN-06. Zeros are entered for the century if the century is omitted. In this example, entering 26-JUN-06, results in the date of 26-JUN-0000, not 26-JUN-2006.

### **D.2 Driver’s License Information**

Human Resources maintains driver’s license information only if it is required for the position.

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

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.

### D.3 Letter and Paragraph Names

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

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	GRD	Graduate School
ADV	University Advancement	HR	Human Resources
ATH	Athletics	HSS	Humanities and Social Sciences
AUX	Auxiliaries	IT	Information Technology Services
BIA	Office of Budget & Institutional Analysis	LIB	Library
BOT	Board of Trustees	MCB	Monfort College of Business
CIE	Center for International Education	NHS	Natural and Health Sciences
COE	College of Ed	PAY	Payroll
ES	Extended Studies	POL	Police
FA	Office of Financial Aid	PRS	President’s Office
FAC	Facilities	PRV	Provost
FN	Finance – Office of Accounting	PUB	News and Publications
FNAP	Finance – Accounts Payable	REG	Office of Records & Registration
FNAR	Finance – Accounts Receivable	SPC	SPARC
FNPR	Finance - Purchasing	UGR	Undergraduate Studies

### D.4 Quick-flow Names

The names of quick-flows created within any module of Banner are stored in a common validation table call “GTVQUIK.” Quick-flow names can be up to four characters long.

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

ADM	Office of Admissions	GRD	Graduate School
ADV	University Advancement	HR	Human Resources
ATH	Athletics	HSS	Humanities and Social Sciences
AUX	Auxiliaries	IT	Information Technology Services
BIA	Office of Budget & Instl Analysis	LIB	Library
BOT	Board of Trustees	MCB	Monfort College of Business
CIE	Center for International Education	NHS	Natural and Health Sciences
COE	College of Ed	PAY	Payroll
ES	Extended Studies	POL	Police
FA	Office of Financial Aid	PRS	President’s Office
FAC	Facilities	PRV	Provost
FN	Finance – Office of Accounting	PUB	News and Publications
FNAP	Finance – Accounts Payable	REG	Office of Records & Registration
FNAR	Finance – Accounts Receivable	SPC	SPARC
FNPR	Finance - Purchasing	UGR	Undergraduate Studies

**Appendix E –Shared Validation Tables**  
**Schedule of Validation and Rule Tables in Alpha Order**

<b>NAME</b>	<b>Validation/Rule Description</b>	<b>Data Steward</b>	<b>Shared/ Not Shared</b>	<b>Not Used by UNC</b>
FTVACCI	Account Index Codes	Finance	Shared	
FTVACCT	Account Codes	Finance	Shared	
FTVACTV	Activity Codes	Finance	Shared	
FTVCOAS	Chart of Accounts	Finance	Shared	
FTVFUND	Fund Codes	Finance	Shared	
FTVLOCN	Location Codes	Finance	Shared	Not currently used
FTVOBUD	Operating Budget Codes	Finance	Shared	
FTVORGN	Organization Codes	Finance	Shared	
FTVPROG	Program Codes	Finance	Shared	
GORNAME	Name Translation Rules	Project Mgmt Team	Shared	
GTVCCRD	Cross Product Credit Card Types	Finance	Shared	
GTVCMSC	Common Matching Source Codes	Project Mgmt Team	Shared	
GTVCURR	Currency Codes	Finance	Shared	
GTVDICD	District Division Codes	Project Mgmt Team	Shared	Not Used
GTVDUNT	Duration Unit Codes	Registrar	Shared	
GTVEMAL	E-mail Address Types	Registrar	Shared	
GTVEXPN	Expense Codes	Finance	Shared	Not Used
GTVFDMN	FGAC Domain Codes	Project Mgmt Team	Shared	
GTVFDTP	FGAC Domain Type Codes	Project Mgmt Team	Shared	
GTVINSM	Instructional Method Codes	Registrar	Shared	
GTVLETR	Letter Codes	Project Mgmt Team	Shared	
GTVMAIL	Mail Codes	Project Mgmt Team	Shared	Not Used
GTVMTYP	Meeting Type Codes	Registrar	Shared	
GTVNTYP	Name Type Codes	Registrar	Shared	
GTVPARA	Paragraph Codes	Project Mgmt Team	Shared	
GTVPARS	Partitions Codes	Registrar	Shared	
GTVSCHS	Scheduling Status Codes	Registrar	Shared	
GTVSCOD	EDI/ISO Standard codes	Information Technology	Shared	Not Used
GTVSUBJ	Subject Index Codes	Registrar	Not Shared	Not Used
GTVTRTP	EDI Transaction Type Codes	Information Technology	Shared	Not Used
GTVZIPC	ZIP/Postal Codes	Information Technology	Shared	
GXVDIRD	Bank Routing Numbers	Finance- AP and HR	Shared	
SMAPRLE	Program Definition Rules	Registrar	Shared	
STVACAT	Degree Award Category Codes	Admissions	Shared	
STVACCG	Activity Categories	Admissions	Shared	
STVACPR	Acceptance Practice Codes	Admissions	Not Shared	Not Used
STVACST	Institution Accreditation Codes	Admissions	Not Shared	Not Used
STVACTC	Activity Codes	Registrar	Shared	
STVACTN	Action Codes	Registrar	Not Shared	

**Appendix E: Schedule of Validation and Rule Tables in Alpha Order (Cont.)**

<b>NAME</b>	<b>Validation/Rule Description</b>	<b>Data Steward</b>	<b>Shared/ Not Shared</b>	<b>Not Used by UNC</b>
STVACTP	Activity Type Codes	Admissions	Shared	
STVACYR	Academic Year Codes	Registrar		
STVADM R	Admissions Request Checklist Codes	Admissions	Shared	
STVADMT	Admission Type Codes	Admissions	Shared	
STVAPDC	Admission Application Decision Codes	Admissions	Not Shared	
STVAPST	Admission Application Status Codes	Admissions	Shared	
STVASCD	Room Assignment Codes	Admissions	Shared	Not Used
STVASRC	Admissions Address Source Codes	Registrar	Shared	
STVASTD	Academic Standing Codes	Registrar	Not Shared	
STVASTY	Assignment Type Codes	Registrar	Shared	Not Used
STVATTR	Attribute Validation Codes	Registrar	Not Shared	
STVATTS	Student Attribute Codes	Registrar	Shared	
STVATYP	Address Type	Registrar	Shared	
STVBCHR	Background Inst. Characteristic Codes	Registrar	Shared	Not Used
STVBLDG	Building Codes	Registrar	Shared	
STVCACT	Curriculum Activity Status Codes	Registrar	Not Shared	
STVCALD	Calendar Codes	Registrar	Not Shared	
STVCAMP	Campus Codes	Registrar	Shared	
STVCERT	Ceremony Type Codes	Registrar	Not Shared	
STVCIPC	CIP Program Codes	Institutional Analysis	Shared	
STVCITZ	Citizen Type Codes	Registrar	Shared	
STVCLAS	Class Codes	Registrar	Shared	
STVCNTY	County Codes	Information Technology	Shared	
STVCOLL	College Codes	Registrar	Shared	
STVCTYP	Contact Type Codes	Admissions	Not Shared	
STVDAYS	Days of the Week	Registrar	Shared	
STVDEGC	Degree Codes	Registrar	Shared	
STVDEPT	Department Code	Registrar	Shared	
STVDISA	Disability Type Codes	Registrar	Shared	Not Used
STVDIVS	Division Codes	Registrar	Shared	
STVDLEV	Degree Level Codes	Registrar	Shared	
STVDPLM	Diploma Types	Registrar	Shared	
STVDRES	Ceremony Dress Codes	Registrar	Not Shared	Not Used
STVEDLV	Education Level Code	Registrar	Not Shared	
STVEMPT	Employment Types	Grad School	Shared	
STVESTS	Enrollment Status Codes	Registrar	Not Shared	
STVETCT	IPEDS Ethnic Codes	Registrar	Shared	
STVETHN	Ethnic Codes	Registrar	Shared	
STVETYP	Event/Function Type Codes	Registrar	Shared	Not Used
STVEVEN	Academic History Event Codes	Registrar	Not Shared	
STVFCNT	Faculty Contract Type Codes	Human Resources	Shared	
STVGCH G	Grade Change Codes	Registrar	Not Shared	

**Appendix E: Schedule of Validation and Rule Tables in Alpha Order (Cont.)**

<b>NAME</b>	<b>Validation/Rule Description</b>	<b>Data Steward</b>	<b>Shared/ Not Shared</b>	<b>Not Used by UNC</b>
STVGCMT	Grade Comment Codes	Registrar	Not Shared	Not Used
STVGEO	Geographic Region Division Codes	Registrar	Shared	Not Used
STVGEOR	Geographic Region Codes	Registrar	Shared	Not Used
STVGMOD	Grading Modes	Registrar	Shared	
STVGRST	Graduation Status Codes	Registrar	Not Shared	
STVHLDD	Hold Type Codes	Registrar	Shared	
STVHLWK	Highest Level of Work Codes	Admissions	Not Shared	Not Used
STVHOND	Departmental Honors Codes	Registrar	Shared	
STVHONR	Institutional Honors Codes	Registrar	Shared	
STVINFC	Interface Validation Codes	Information Technology	Shared	
STVINIT	Initials Codes	Admissions	Shared	Not Used
STVINNM	Awarding Institution Codes	Registrar	Not Shared	
STVLANG	Language Codes	Grad School	Shared	
STVLEAD	Leadership Codes	Registrar	Shared	Not Used
STVLEVL	Level Codes	Registrar	Not Shared	
STVLGCY	Legacy Codes	Registrar	Shared	Not Used
STVMAJR	Major, Minor, Concentration Codes	Registrar	Shared	
STVMATL	Material Codes	Graduate School	Shared	Not currently used
STVMDEQ	Medical Equipment Codes	Registrar	Shared	
STVMEAS	Measurement codes	Registrar	Not Shared	Not Used
STVMEDI	Medical Codes	Registrar	Shared	
STVMRTL	Marital Status Codes	Human Resources	Shared	
STVNATN	Nation Codes	Information Technology	Shared	
STVNCRQ	Non-Course Requirement Codes	Registrar	Not Shared	
STVNCST	Non-Course Requirement Status Codes	Registrar	Not Shared	
STVORIG	Originator Codes	Registrar	Shared	
STVPENT	Port of Entry Codes	Grad School	Shared	
STVPRCD	Phone Rate Codes	Registrar	Shared	Not Used
STVPRGA	Program Accreditation Codes	Admissions	Not Shared	Not Used
STVPTYP	Contact Person Type Codes	Admissions	Shared	Not Used
STVPWAV	Prerequisite Waiver Codes	Registrar	Not Shared	
STVQPTP	Qualifying Paper Codes	Registrar	Not Shared	
STVRDEF	Building/Room Attribute Codes	Registrar	Shared	
STVRELG	Religion Codes	Registrar	Shared	Not Used
STVRELT	Relation Codes	Registrar	Shared	
STVRES	Residency Code Validation	Registrar	Not Shared	
STVRMST	Room Status Codes	Registrar	Shared	
STVRRCD	Room Rate Codes	Registrar	Shared	Not Used

**Appendix E: Schedule of Validation and Rule Tables in Alpha Order (Cont.)**

<b>NAME</b>	<b>Validation/Rule Description</b>	<b>Data Steward</b>	<b>Shared/ Not Shared</b>	<b>Not Used by UNC</b>
STVRSTS	Registration Status Codes	Registrar	Not Shared	
STVSBGI	Source/Background Institution Codes	Admissions	Shared	
STVSCHD	Schedule Type Codes	Registrar	Not Shared	
STVSITE	Site Codes	Registrar	Shared	Not Used
STVSIZE	Academic Dress Size Codes	Registrar	Not Shared	Not Used
STVSPON	International Student Sponsor Codes	Center for Internl Ed	Shared	
STVSTAT	State/Province Codes	Information Technology	Shared	
STVSTST	Student Status Codes	Registrar	Not Shared	
STVSTYP	Student Type Codes	Registrar	Not Shared	
STVSUBJ	Subject Codes	Registrar	Shared	
STVTA AU	Acceptance Authority Codes	Admissions	Not Shared	
STVFAST	Transfer Articulation Codes	Admissions	Not Shared	
STVTELE	Telephone Types	Registrar	Shared	
STVTERM	Term Codes	Registrar	Not Shared	
STVTE SC	Test Codes	Admissions	Shared	
STVTLVL	Transfer Level Codes	Admissions	Not Shared	Not Used
STVTMST	Time Status Codes	Registrar	Not Shared	
STVTPRT	Transcript Type Codes	Registrar	Not Shared	
STVTRMT	Term Types	Registrar	Not Shared	
STVTSRC	Admission Test Score Source Codes	Admissions	Not Shared	
STVTYPE	Academic Dress Type Codes	Registrar	Not Shared	Not Used
STVVTYP	Visa Type Codes	Grad School	Shared	
STVWACK	Web Acknowledgements	Registrar	Not Shared	
STVWAIV	Application Fee Waiver Codes	Admissions	Not Shared	
STVWDR L	Student Withdrawal Codes	Registrar	Not Shared	Not Used
TSAISTC	Installment Plan Code Control	Bursar	Not Shared	Not Used
TSATBDS	Term-Based Designator Rules	Bursar	Not Shared	
TTVBILL	Billing Codes	Bursar	Not Shared	
TTVCCRD	Voice Response Credit Card Types	Bursar	Not Shared	Not Used
TTVDCAT	Detail Category Code	Bursar	Not Shared	
TTVDELI	Delinquency Codes	Bursar	Not Shared	
TTVD TYP	Deposit Type Codes	Bursar	Not Shared	
TTVECAT	Entity Category Codes	Bursar	Not Shared	Not Used
TTVPAYT	Payment Type Codes	Bursar	Not Shared	
TTVREPT	Tax Report	Bursar	Not Shared	
TTVRHLD	Auto-Hold Codes	Bursar	Not Shared	
TTVSBRC	Schedule/Bill Codes	Bursar	Not Shared	
TTVSRCE	Change Payment Source Codes	Bursar	Not Shared	
TTVTBDS	Term-Based Indicator	Bursar	Not Shared	
TTVTPRC	Third Party Billing Rule Codes	Bursar	Not Shared	Not Used
TTVVAUTH	Authorization Validation Codes	Bursar	Not Shared	

## Appendix F – Report Documentation

### **Report Documentation**

### **Report Documentation**

To provide background historical and maintenance information, all report programs should include pertinent documentation at the beginning of the program, before the source code. Each developer should provide this information prior to submitting it for migration (publication). Data stewards should use this information as part of their validation process.

Required information includes:

#### 1. GENERAL INFORMATION.

- ∞ Report Descriptor. A six (6) character name (e.g. AAAnnn) *applied by Insight Team as a step in the migration process.*
- ∞ Report Title. A free form name chosen by the developer. This field is limited to 64 characters.
- ∞ Created For. Department or organization name the report was created for.
- ∞ Created by. The name of the original developer (creator) of the report.
- ∞ Created Date. The date (format=MMM DD, CCYY) in which the developer started writing the report.
- ∞ Synonym(s). A list of synonyms used in the program.
- ∞ Parameter(s). A comprehensive list of parameters utilized in the program and their purpose. Parameters should be named according to their purpose.
- ∞ Report Description. A detailed description of the report purpose, pertinent characteristics and other information to assist users in understanding the report. This description will be used in a report catalog to identify the functionality of the report.
- ∞ Other Comments. Information on execution requirements, operational considerations, legal directives, limitations, etc.

#### 2. MAINTENANCE DATA.

- ∞ Modified Date. The date (format=MM/DD/ CCYY) in which the developer modified the report.
- ∞ Modified By. The name of the developer that modified the report.
- ∞ Description of Change(s). A detailed description of additions, changes or deletions made to the program.

A sample template is provided below:

```
_*GENERAL INFORMATION:

_* Report Descriptor:
_*Report Title:
_*Created for:
_*Created by:
_*Created Date:
_*Synonym(s):
_*Parameter(s):
_*Report Description:
_*Other Comment(s):
_*MAINTENANCE DATA:
_* Modified Date:      Modified by Name:      Description of Change(s):
   mm/dd/ccyy           Name                Description
```

**Appendix G – Current Integrity and Standards Team Members**

Data Integrity and Standards Team Members:

- ∞ Nolan Oltjenbruns, Registrar's Office (Chair and Data Steward)
- ∞ Guy Brenckle, Office of Budget and Institutional Analysis
- ∞ Robin Brewer, Faculty Representative
- ∞ Kelley Christman, Registrar's Office
- ∞ Donni Clark, Director of Student Financial Aid (Data Steward)
- ∞ D. J. Cox, Information Technology
- ∞ Krystal Dilka, Training Coordinator
- ∞ John Godman, Information Technology
- ∞ Mark Gonzales, Information Technology
- ∞ Bret Naber, Information Technology
- ∞ Lee Ann Sappington, Office of Budget and Institutional Analysis
- ∞ Diana Suhr, Office of Budget and Institutional Analysis (Data Steward)
- ∞ Chris Downen, Admissions (Data Steward)
- ∞ Geri Landwehr, Bursar's Office (Data Steward)
- ∞ Michelle Quinn, Financial Services
- ∞ Julie Merrill, Payroll Services (Data Steward)
- ∞ Marshal Parks, Human Resources (Data Steward)
- ∞ Linda Sisson, Graduate School (Data Steward)
- ∞ Mary Sorensen, Internal Auditing
- ∞ Paul Squillace, Controller (Data Steward)
- ∞ Dan Tacker, Banner Implementation Project Manager (Data Steward)
- ∞ Jeanette Van Galder, Information Technology