

UNIVERSITY *of*
NORTHERN COLORADO



BANNER 7.0
DATA STANDARDS MANUAL

Published: TBD

DRAFT

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 a person or organization, please make sure that person or organization has not already been entered in the BANNER database. **Each user must conduct a thorough search to prevent entering a duplicate record.** Duplicate records create problems in multiple 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 ORACLE 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. When entering data using abbreviations please use only these approved forms.
- **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 or Prefixes or Suffixes such as Mr, Ms 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

Before creating a Person...

Search on GUIALTI or GOAMTCH using ID, SSN, Last Name, and First Name with % before and after each search string.

Person Names

1. Enter last, first, and middle names exactly as provided, using upper and lower case and maintaining spaces. (*duBois, Van Buren, Van der Lage, Vander Vaart*)
2. Enter hyphens, apostrophes or dashes as indicated, but do not use periods or commas. (*Ann/M/St John-O'Neil*)
3. Do not enter special characters (&, %, #, "").
4. If first name is indicated as initial and full middle name, enter both in **First Name** field. (*D Gary/blank/Smith*)
5. If a person has more than two given names and does not specify first vs. middle, enter first two in **First Name**, remainder in **Middle Name**. (*Anne Marie/Susan/Smith*)
6. If a person has only one name, enter it in **Last Name** field and leave **First Name** field blank.
7. Enter prefixes (*Dr, Rev, Mr*) and suffixes (*PhD, Esq, Jr, III*) without punctuation, if required.
8. If a name is longer than the field allows, enter as much as possible.

Street Addresses

1. Enter data in first address line, then second, then third.
2. Enter delivery address in last used line before **City**.
3. Abbreviate Post Office *PO* with no space and enter by itself on last used line before **City**. (*PO Box 1234*)
4. Do not use special characters (#, %, &).
5. Enter *and* in place of &, and *No* in place of # and Number.
6. Enter *c/o* in place of *in care of* in **Street Line 1**.
7. Enter attention line in **Street Line 1**. (*Attn Bob Snow*)
8. Enter periods, slashes, and hyphens only in street number and zip code. (*39.2 rd, 101 1/2 Main St, 289-01 North Ave, 97203-4798*)
9. Use numbers for numbered streets and include *st, nd, rd, th*. (*201 4th St, 1919 23rd Ave, 4801 NW 101st St*)
10. Abbreviate street suffixes, unit designators, and directionals, if not part of primary name (*N South Oak*)
11. If there are two street suffixes, abbreviate second; first becomes part of street name. (*1300 W 43rd Avenue Ct*)
12. Enter unit designators after street address or on line above.
13. Spell out street and city names, if space allows. (*County Road 14, Fort Collins, Idaho Springs*)
14. Allow Banner to enter **City** and **State** from **Zip Code**.
15. **Campus address** is to be used for **Employees ONLY**. Enter "Home" Department in **Street Line 1**, Building Building and Room Number in **Street Line 2**, Cmpus Box in **Street Line 3**, and Greeley in **City**.

Address

Abbreviations

Street Suffixes		Unit Designators	
Avenue	Ave	Apartment	Apt
Boulevard	Blvd	Basement	Base
Center	Ctr	Building	Bldg
Circle	Cir	Department	Dept
Corner	Cor	Floor	Fl
Court	Ct	Lower	Lowr
Drive	Dr	Number	No
Expressway	Expy	Office	Ofc
Freeway	Fwy	Room	Rm
Highway	Hwy	Suite	Ste
Lane	Ln	Trailer	Trlr
Parkway	Pkwy	Unit	Unit
Place	Pl	Upper	Uppr
Plaza	Plz		
Point	Pt	Compass Directionals	
Road	Rd	North	N
Route	Rt	South	S
Square	Sq	East	E
Terrace	Ter	West	W
Trail	Trl	Northeast	NE
Turnpike	Tpke	Northwest	NW
Way	Way	Southeast	SE

Telephone Numbers

Enter telephone numbers if provided, do not use any punctuation (such as hyphens). The telephone number entry is divided into three fields. The first field is for area code entry, the second field should include all seven digits of the phone number (without a hyphen), the third field is reserved for the extension number. *Only numeric values should be entered in any of the three fields, NO ALPHA CHARACTERS.*

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

Set the *Primary* indicator if the telephone number is the primary contact for the entity
Set the *Unlisted* indicator if the telephone number should be designated as 'unlisted.'
Set the *Inactive* indicator if the telephone number is no longer valid.

Telephone Types

Business	BU
Campus	CAMP
Cell Phone	CELL
Emergency	EMER
Fax	FAX
Home	HOME
Permanent	PR
Pager	PAGE
Third Party	TP
Toll Free	TOLL
Directory	CD

Foreign Addresses

1. Enter as provided including punctuation, except commas.
2. Do not abbreviate spelled-out words, if space allows.
3. Enter non-Canadian state/province in **Street Line 3**.
4. Enter Canadian province in **State or Province**.
5. Enter **998** in **County**.
6. Enter postal code (with spaces) in **Postal Code**.
7. Enter country name from validation table in **Nation**.

NONPERSON (Vendor) - Data Standards Quick Reference

<p>Before creating a NonPerson Vendor... Search on GUIALTI or GOAMTCH using ID, TIN, Name, and with % before and after each search string</p>	<p>Address Abbreviations</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Street Suffixes</th> <th style="text-align: left;">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>Blvd</td><td>Basement</td><td>Base</td></tr> <tr><td>Center</td><td>Ctr</td><td>Building</td><td>Bldg</td></tr> <tr><td>Circle</td><td>Cir</td><td>Department</td><td>Dept</td></tr> <tr><td>Corner</td><td>Cor</td><td>Floor</td><td>Fl</td></tr> <tr><td>Court</td><td>Ct</td><td>Lower</td><td>Lowr</td></tr> <tr><td>Drive</td><td>Dr</td><td>Number</td><td>No</td></tr> <tr><td>Expressway</td><td>Expy</td><td>Office</td><td>Ofc</td></tr> <tr><td>Freeway</td><td>Fwy</td><td>Room</td><td>Rm</td></tr> <tr><td>Highway</td><td>Hwy</td><td>Suite</td><td>Ste</td></tr> <tr><td>Lane</td><td>Ln</td><td>Trailer</td><td>Trlr</td></tr> <tr><td>Parkway</td><td>Pkwy</td><td>Unit</td><td>Unit</td></tr> <tr><td>Place</td><td>Pl</td><td>Upper</td><td>Upr</td></tr> <tr><td>Plaza</td><td>Plz</td><td></td><td></td></tr> <tr><td>Point</td><td>Pt</td><td></td><td></td></tr> <tr><td>Road</td><td>Rd</td><td></td><td></td></tr> <tr><td>Route</td><td>Rt</td><td></td><td></td></tr> <tr><td>Square</td><td>Sq</td><td></td><td></td></tr> <tr><td>Terrace</td><td>Ter</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>Way</td><td>Way</td><td></td><td></td></tr> </tbody> </table>	Street Suffixes	Unit Designators	Avenue	Ave	Apartment	Apt	Boulevard	Blvd	Basement	Base	Center	Ctr	Building	Bldg	Circle	Cir	Department	Dept	Corner	Cor	Floor	Fl	Court	Ct	Lower	Lowr	Drive	Dr	Number	No	Expressway	Expy	Office	Ofc	Freeway	Fwy	Room	Rm	Highway	Hwy	Suite	Ste	Lane	Ln	Trailer	Trlr	Parkway	Pkwy	Unit	Unit	Place	Pl	Upper	Upr	Plaza	Plz			Point	Pt			Road	Rd			Route	Rt			Square	Sq			Terrace	Ter			Trail	Trl			Turnpike	Tpke			Way	Way		
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DATA STANDARDS MANUAL PREFACE

DATA STANDARDS

The University of Northern Colorado (UNC) 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 its 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 UNC;
- Outlining the responsibilities of users of the information maintained in the database.

ADMINISTRATIVE RESPONSIBILITY

By law, certain data is confidential and UNC 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 UNC. All institutional data, whether maintained in the central database or copied into other data systems (e.g. personal computers) remains the property of UNC. 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 identification (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 UNC 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 UNC. 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

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 oversee 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 UNC. This committee was formed to address Colorado House Bill 03-1175 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 of Northern Colorado 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		

Need Procedure for Unlisted Telephone numbers for Students.

1.B.3. Employee Directory Information

Need to add Employee Directory Information

1.B.4. 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.5. Releasing Confidential Information

Releasing **any** information (including directory information) about a student who has signed a “Request for Non Release of Directory Information” 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

A Data Steward is designated by the project management team and is responsible for:

- The accuracy and completeness of data files in their areas.
- The maintenance and control of Banner validation and rules tables.
- The assignment of security access to Banner Users for the use and support of University functions.

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 UNC data, the Data Steward consents to the use of that data within the normal business functions of administrative and academic offices or departments.

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

1.C.2. Table of UNC Stewards

<u>Area of Responsibility</u>	<u>Data Steward</u>
Employees, other than student employees	Director of Human Resources
Employment applicants, other than student employees	Director of Human Resources
Students, including student employees	Registrar
Student applicants/prospects (undergraduate)	Director of Admissions
Student applicants/prospects (graduate)	Graduate School
Vendors	Controller
Financial aid Information	Director of Financial Aid
Accounts receivable information	Bursar

1.D. Data Access

1.D.1. Banner Log-in and Password User Responsibility

Users are not to share access codes such as login and passwords with anyone.

This section describes the process to obtain query and maintenance access to the data stored in the Banner database. All users must first understand that data security, electronic or otherwise, is every user's responsibility. Users are responsible for understanding all data elements that are accessed. If a user does not understand the meaning of a data element, the user should consult his/her supervisor or the appropriate Data Steward (see the Data Steward section). Users MUST protect all UNC 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 identification (ID) and password.

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

1.D.2. Banner Login and Security Assignment

UNC 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 UNC data standards, UNC 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:

1. A description of the specific data access requested
2. Justification for access to the data
3. The name of the individual/position who denied the access to the data

1.E. Data Modifications

1.E.1. Original Entry of Student, Employee and Vendor Records

Banner System Student, Employee and Vendor “Identifying Information” includes Legal Name, Marital Status, Social Security Number (SSN) and/or Taxpayer Identification Number (TIN).

Student and Employee identifying information is entered into the Banner System as “Person” information using the Banner form “SPAIDEN” or “PPAIDEN.”

Vendor identifying information is entered into the Banner System as “NonPerson” information using the Banner form “FOAIDEN” or “FTMVEND.”

The original entry of Name, Marital Status and Social Security/Taxpayer ID number is based upon the following information:

- Original Student information is entered from self-reported information provided by the student through the application process. This information is “Person” information.
- Original Employee information is entered 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 is entered from W-9 information provided by the vendor through the purchasing process. This information is “Person” information for Vendors who use a Social Security Number (SSN) for tax purposes. This information is “NonPerson” information for Vendors using a Taxpayer Identification Number (TIN) for tax purposes (Corporations, Partnerships, LLC’s, etc).

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.

1.E.2. Changes to Legal Name, Marital Status, Social Security Number and/or Taxpayer Identification Number

1.E.2.a. “Person” and “NonPerson” Identifying Information Change Process

Changes required to correct initial input errors related to Identifying Information (Name, Marital Status, Social Security Number (SSN) and/or Taxpayer Identification Number (TIN)) are based upon the original, correct documentation provided to the University, and therefore, do not require additional documentation.

When adjustments are required to Identifying Information due to errors and/or changes to the original documentation supplied to the University, the changes must be appropriately documented. The Student, Employee or Vendor must complete either a Student, Employee or Vendor “Person” Change Request Form or a Vendor “NonPerson” Change Request Form. (These forms are available in Appendix A).

The completed change form, along with original documentation, is then submitted to the appropriate office as determined in 1.E.2.e below.

1.E.2.b. Acceptable Documentation for Student or Employee Information Changes

Documents supplied must be original documents and cannot be copies.

Acceptable documentation for Student or Employee SSN changes is the Student or Employee's *original*:

- Social Security Card.

Acceptable documentation for a Student or Employee Legal Name change includes the Student or Employee's *original*:

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

Acceptable documentation for a Student or Employee Marital Status change includes the Student or Employee's *original*:

- Marriage License
- Court Document

1.E.2.c. Acceptable Documentation for "Person" Vendor Information Changes

As noted in 1.E.1 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 been previously been a Student and/or Employee at UNC**. 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 UNC Student or Employee.

"Person" Vendors who have previously been or currently are UNC Students and/or Employees must provide the same documentation for Name, SSN, and Marital Status Changes as Students or Employees as described above in 1.E.2.b.

1.E.2.d. Acceptable Documentation for "NonPerson" Vendor Information Changes

As noted in 1.E.1 a "NonPerson" Vendor is a Corporation, Partnership, and/or LLC that use a Taxpayer Identification Number (TIN) for identification purposes).

A Revised W-9 form is acceptable documentation for a change to the Legal Name and/or TIN for a "NonPerson" Vendor.

1.E.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 Change Request Form, authorized Banner Users will enter the Student, Employee or Vendor BEAR ID number into this form. 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 the form and Banner will identify the various modules in which data is stored for the Student, Employee or Vendor.

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

1. Undergraduate Students **BEFORE** matriculation: Changes are made by the Admissions Office.
2. Graduate Students **BEFORE** matriculation: Changes are made by the Graduate School Office.
3. International Students **BEFORE** matriculation: Changes are made by the Graduate School and/or International Admissions Office.
4. **All Students and Student Employees AFTER matriculation: Changes are made by the Registrar's Office.**
5. **Non-Student Employees: Changes are made by the Human Resources Office.**
6. "Person" Vendors (Vendors using an SSN for Tax ID) who have previously been and/or currently are a Student and/or Employee of UNC: Changes are made as determined by 1-5 above.
7. "Person" Vendors (Vendors using an SSN for Tax ID) who have never been a Student and/or Employee of UNC: Changes are made by the Purchasing Office.
8. Non-Persons Vendors (Vendors using a TIN for Tax ID: Changes are made by Purchasing Office.
9. Students, Employees and Vendors with multiple roles (both Student and Vendor, current Student and previous Employee, etc.): Changes may be made as appropriate by either the Registrar or Human Resources Office.

1.E.2.f. Identifying Information Change Data Entry

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 or FTMVEND

Using the appropriate form, the authorized Banner user making the identifying information change should enter the Bear ID Number or complete a name search. Once the correct Student, Employee or Vendor is retrieved, the incorrect information should be corrected by typing over it. The spelling of the name and/or the numbers in the SSN and/or TIN should be verified. Once verification is complete and 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

1.E.3. Banner User Names

1.E.3.a. Banner User Names Format

Each Banner user is assigned a Banner/Oracle 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.E.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 employees 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.E.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 a *Student, Employee or Vendor "Person" Change Request Form*;
 - b. Complete a *BANNER USER_NAME Change Form*;
 - c. Provide proper original documentation as described in 1.A.2.b above.
2. These forms and valid documentation is 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.

1.E.3.c. Banner USER_NAME Changes (Continued)

3. The **Human Resources Office or Registrar's Office** then:
 - a. Verifies that the change should be processed from the completed Student, Employee "Person" Change Request Form and the submitted, original documentation.
 - b. Following the Identifying Information Change Process described in 1.E.2 above, 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 Oracle USER_NAME.
 - c. The **original** Student, Employee or Vendor "Person" 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 Student, Employee or Vendor "Person" Change Request Form is then attached to the **original** BANNER USER_NAME Change Form.
 - e. The **original** Student, Employee or Vendor "Person" 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 **original** BANNER USER_NAME Change Form plus the **copy** of the Student, Employee or Vendor "Person" Change Request Form is then forwarded to the Technical Support Center (TSC).

4. The **Technical Support Center (TSC)** then:
 - a. Creates the new Oracle USER_NAME to match the employee's revised name.
 - b. Removes the BANSECR CLASS Security Access for the Security Classes assigned to the Employee's previous USER_NAME.
 - c. Reassigns the identical BANSECR CLASS Security Access to the Employee's new USER_NAME.
 - d. Inactivates the Employee's previous USER_NAME.
 - e. The TSC employee who completes this process then signs and dates the original BANNER USER_NAME Change Form.
 - f. A copy of the BANNER USER_NAME Change Form (plus a copy of the Student, Employee or Vendor "Person" Change Request Form) is made for the TSC's records documenting the BANSECR CLASS Security access change.
 - g. The original BANNER USER_NAME Change Form (plus the copy of the Student, Employee or Vendor "Person" Change Request Form) is forwarded to the Finance Office.

1.E.3.c. Banner USER_NAME Changes (Continued)

5. The **Finance Office** then:
 - a. Removes the Employee's Finance Fund and Org security access that was assigned under the **previous USER_NAME** using Banner forms: FOMUSOR, FOMUSFN, FTMFMGR, and FOMPROF.
 - b. Reinstates the Employee's Finance Fund and Org security access that was assigned under the previous USER_NAME to **the New USER_NAME** using Banner forms: FOMUSOR, FOMUSFN, FTMFMGR, and FOMPROF.
 - c. The Finance employee who completes this process then signs and dates the original BANNER USER_NAME Change Form.
 - d. A copy of the BANNER USER_NAME Change Form, (plus a copy of the Student, Employee or Vendor "Person" Change Request Form) is made for the Finance Office's records documenting that the previous Fund and Org security access was reassigned to the new USER_NAME.
 - e. The original BANNER USER_NAME Change Form (plus the copy of the Student, Employee or Vendor "Person" Change Request Form) is forwarded to the Payroll Office.

6. The **Payroll Office** then:
 - a. Removes the Employee's Payroll Org security access that was assigned under the **previous USER_NAME** using Banner forms: PSAORGN, PTRUSER and GOAEACC.
 - b. Reinstates the Employee's Payroll Org security access that was assigned under the previous USER_NAME to the **new USER_NAME** using Banner forms: PSAORGN, PTRUSER and GOAEACC.
 - c. The Payroll employee who completes this process signs and dates the original BANNER USER_NAME Change Form.
 - d. The original BANNER USER_NAME Change Form (plus the copy of the Student, Employee or Vendor "Person" Change Request Form) is kept in the Payroll Office to document the completion of the USER_NAME change.

1.E.4. Multiple PIDM

Duplication of the same record in Banner tables is a serious issue. This phenomenon is generally referred to as a "Multiple PIDM." PIDM (Person Identification Master) is the internally assigned system number that connects all the data that is associated with a Banner UNC Bear ID Number. A UNC Bear ID record can represent a student, employee, vendor, etc. To purge duplicate PIDM's and "contain" duplicate PIDMS that cannot legally be purged requires a planned and coordinated effort that occurs on a regular basis. This coordinated effort must be worked together between the Banner modules of Finance, Student, Financial Aid, and Human Resources.

Duplicated records appearing more than once under different PIDM's can occur in a variety of ways. The following activities can result in the creation of duplicate PIDM's:

- Errors made by Banner users when keying in Person Information into the Banner system. See Section 2 for search instructions to complete before a new PIDM record is entered.
- Errors made by student applicants using the Banner Self Serve module.
- Interim general person data load scripts that keep Banner updated until all major modules have been converted.
- Data feeds to Banner such as loading the Financial Aid Federal Applications, (FAFSA's), SAT/ACT tapes for Student, etc.

The PIDM to continue and the PIDM to eliminate can be determined by examining:

- What data is under each #
- Which data is easiest to move or re-enter
- In most cases the PIDM used by Financial Aid, Accounts Receivable, and/or HR should be retained.

Temporary corrections for duplicate PIDM's include

- 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 alerts users not to use the record until it's purged from the system.
- A hold should be put on the duplicate Student PIDM account using the SOAHOLD form for Student records. This prevents further transactions from occurring against the duplicate PIDM record.

Key Banner module users must be involved on an ongoing basis to resolve duplicate PIDM entries before further use of the duplicate record(s) prohibits them from being purged from the system. When duplicate PIDM records cannot be system purged they will be "contained" so further use of the unusable record will be severely limited. Each Banner Module Data Steward will assign a representative to the Duplicate PIDM Cleanup Team to be the key contact involved in multiple/duplicate PIDM issues.

Potential duplicate PIDM records are to be identified on a nightly basis by running a series of scripts against key Banner tables. A Duplicate PIDM Report of potential duplicate PIDM records, sorted by Last Name, then by First Name is created. This Duplicate PIDM Report is distributed electronically to the Duplicate PIDM Cleanup Team.

Analyzing and eliminating duplicate PIDM records must be a coordinated activity between multiple disciplines and must be controlled. General guidelines and procedures for the duplicate PIDM Cleanup Team include the following:

- Analyzing the Duplicate PIDM Report to determine if actual duplicate PIDM records exist.
- When a potential duplicate is identified during the course of business, or is being worked on by one of the Cleanup Team members, a comment should be placed on SPACMNT. The format of this comment will be determined by the Duplicate PIDM Cleanup Team.

The actual purge of an identified duplicate PIDM record must be performed by a Banner Data Base Administrator. The process for completing the actual purge will also be determined by the designated Banner Module contact representatives.

1.E.5. Changes to Validation Tables

Changes to Banner Validation Table elements require supporting documentation and a completed change request form 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. See Appendix B.

1.E.6. Changes to Data Standards

Changes to Data Standards elements listed in this manual require supporting documentation and a completed change request form submitted to the Data Standards Team for approval. See Appendix B.

2. Common Matching

2.A. Standards

For data accuracy and consistency it is very important to prevent the creation of duplicate records. To achieve this goal, very few Banner Users will be granted access to create new students, employees or vendors. Access is also limited for users capable of changing personal information. Users who are granted access to create or change personal information should be carefully trained and should know the standards required by this manual.

Before creating a new record a thorough search **MUST** be conducted to ensure that a duplicate record is not created. This search is to be conducted using the "Common Matching" entry form (**GOAMTCH**).

Common Matching is set up to search on the following criteria for each method of data input:

Online input:	First Name Date of Birth	Middle Name SSN	Last Name
Batch input:	First Name Date of Birth	Middle Name SSN	Last Name High School
Non-Person input:	Non-Person Name SSN	TIN	

If a match does not exist, the information entered into the **GOAMTCH** form will roll into the general person information.

2.B. Validation Tables

See the "Validation Table Dictionary" for additional information regarding validation table: **GTVCMSC – Common Matching Source Codes**.

3. Current Identification

3.A. Standards

3.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, drivers license, passport 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 UNC as the legal name.

Names for persons and non-persons should have a customer friendly appearance. The objective is to enter names and addresses with both upper and lowercase letters so that when a name is printed on correspondence, it looks contemporary and professional. Name formats have also been developed to meet 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 that person 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 “NonPerson”) 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 “Common Matching” form (GOAMTCH) to search for an existing record. See Chapter 2 on Common Matching.

3.A.2. “Person” and “NonPerson” Bear ID’s

3.A.2.a Person ID

UNC’s “Bear Number” will be used for all Person ID’s.
Banner will supply a new “Bear Number” for each newly created person.

3.A.2.b Non-Person ID

UNC’s “Bear Number” will be used for all Non-Person ID’s.
Banner will supply a new “Bear Number” for each newly created Non-Person.

3.A.2.c Changes to UNC Bear ID Numbers

It is vitally important to maintain the integrity of PIDM’s and their relationship to UNC Bear ID Numbers. UNC Bear ID Numbers, therefore, are only cancelled when duplicate numbers are assigned. Only in the rarest of circumstances will a Student or Employee be manually assigned a different UNC Bear ID 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.

3.A.3. Name Types

A person or non-person’s **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

3.A.4. 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.

3.A.4.a 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- lower-case format based upon these rules.

3.A.4.b 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.

3.A.4.c 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

3.A.4.d Multipart Names

Maintain spaces in **Last Names** (one space maximum) exactly as reported by the person.

Examples:

Van Buren Van der Vaart Vander Vaart

3.A.4.e 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.

3.A.4.f Persons with One Name

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

3.A.4.g Punctuation

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

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

3.A.5. Prefixes and Suffixes

These fields are only used if the person indicates a **Prefix/Suffix**.

Salutations (such as Dr, Rev, Mr, Mrs, Ms, etc.) are considered prefixes and if indicated by the person should be entered in the **Prefix** field on General Person Forms. Prefixes will be entered in upper/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 forms.

DO NOT include any punctuation with a prefix or suffix.

Correct:	Mr	Ms	Dr	MD	PhD	Jr
Incorrect:	Mr.	Ms.	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

3.A.6. 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
Preferred First Name:	Bill
Current Name:	D Mark Williams
Preferred First Name:	Mark

3.A.7. Full Legal Name

The 'Current Name' field in Banner is considered the legal name (See 3.A.1). The **Full Legal Name** Field is, therefore, **NOT** used or maintained by the University.

3.A.8. Non-Person Names

All Non-Person Name information is typed in upper/lower case format (i.e. not all caps or all lower). 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 a non-person entry, it should be included when entering the name in Banner. If a non-person name begins with the word 'The', it should be included when entering the name in Banner (e.g. The 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 and 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

3.B. Validation Tables

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

FTVVVTYP – Vendor Type Codes (Required).

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

3.C. Summary

- Use the **Common Matching** form (GOAMTCH) to search for existing records and prevent duplicates.
- Banner will automatically generate a UNC Bear ID Number for all entities.
- Use standard upper/lower case letters for names.
- Do not use special characters in names (ex. &, %, #, etc.). This includes no 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 UNC.

4. Alternate Identification

4.A. Standards

4.A.1. General

For the **Alternate Identification** block, follow the same standards as shown in Chapter 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

UNC's previously used 5 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.A.2. Name Type Codes

Name Type is required in the **Alternate Identification** block (see 3.A.3).

4.A.3. Change Type

This is a field that shows whether the alternate record is for a previous/alternate **Name** or a previous/alternate **ID**.

4.B. Validation Tables

See the "Validation Table Dictionary" for additional information regarding validation table: **GTVNTYP – Name Type Codes**.

5. Address Information

5.A. Standards

5.A.1. General

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

The University of Northern Colorado's Data Standards team has utilized the following sources to determine the standards to be utilized in the Institution's Banner System:

Banner System Requirements	U.S. Postal Service Guidelines
Accepted standards for formal communications	
Federal Information Processing Standards	
International address requirements	

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.

All information should be entered into the Banner System using upper/lower case format (i.e. not all caps or all lower). U.S. Postal Standards, however, prefer mailing addresses to be in all upper case and international postal standards 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 US Postal Service Postal Addressing Standards, "A standardized address is one that is fully spelled out, abbreviated by using the Postal Service standard abbreviations...and uses the proper format for the address style." 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.A.2. 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.
- Other Address Types may be used if an address is different than the primary address.

If avoidable, identical addresses should not be keyed into different address types. For example, if a student's **'MA'** Mailing address is identical to his/her **'PR'** Permanent address and/or **'PA'** Parent address, the address needs to be entered only into the **'MA'** Mailing address type. Exceptions may be made for addresses used for purchase requisitions and purchase orders. The **'BU'** Address Type is the primary address for businesses, but may be duplicated for **'PO'** Address Type use.

Each Banner application (e.g. recruitment mail, billing grades) will look for a valid address in a prescribed sequence. For example, the billing routine might look for addresses in this order: BI and then MA.

See the "Validation Table Dictionary" for additional information regarding validation table: **STVATYP – Address Type Codes.**

5.A.3 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	Registrar & Accts Rec	NA	NA
BI	Billing -Accounts Payable	Vendors	Purchasing	Purchasing	Purchasing
BU	Business - Accounts Payable	Vendors	Purchasing	Purchasing	Purchasing
CA	Payroll Campus Addresses	Employees only	Human Resources	Human Res	Human Res
EM	Emergency Contact	Students & Employees	Registrar & Accts Rec	Human Res	NA
MA	Local Mailing, US Postal Service	Students & Employees	Registrar & Accts Rec	Human Res	Purchasing
PA	Parent Address	Students	Registrar	NA	NA
PO	Purchase Order Address	Vendors	Purchasing	Purchasing	Purchasing
PR	Permanent Address	Students	Registrar	NA	NA
RF	Returned Mail - Identifies a "bad" address in the Banner System	Students, Employees and Vendors	Registrar & Accts Rec	Human Res & Purchasing	Purchasing
TP	Third Party Billing	Students	Accounts Receivable	NA	NA

5.A.4. 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.A.5 Sequence Number

This field is automatically populated by Banner.

5.A.6. 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.A.6.a. Address Number including 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 a 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.A.6.b. Street Name

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 suffix)
County Road 14	CR 14	Cnty Rd 14
Interstate 5	I5	I 5

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

4415 101st St
1901 23rd Ave
101 County Road 20
2200 Highway 50

5.A.6.c. Street Suffix

Street suffixes should use the standard abbreviations shown in appendix C.3

123 Magnolia St
1401 Main Ave

5.A.6.d. 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.A.6.e. 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
N South Oak St
Maple Court East W

5.A.6.f. P.O. Boxes

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

PO Box 1234

5.A.6.g. 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.A.6.h. 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 "CA" 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 UNC 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.A.6.i. Student Dormitory Addresses

Student Dormitory Addresses should use the Mailing Address Type 'MA.' These addresses should follow the recommended US Postal Service address format shown below:

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

5.A.6.j. 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)

SSGT Mario Martian Unit 2050 Box 4190 APO AP 96522-1215	Sgt Cher Downey PSC 802 Box 2625 APO AE 90777-0010
Seaman Duane Reeves B Division USS North Dakota	

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.A.6.k. 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

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.

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

In other cases, the city alone should appear in the City field:

Walter C. Brown	
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.A.7. 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 upper/lower case format and spell out the name in its entirety. Do not abbreviate.

Examples:

West Stockbridge	Colorado Springs
Fort Collins	Glenwood Springs

5.A.8. 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 Provinces are entered in the **State or Province** field, NOT in the **City** field. Canadian Provinces include Alberta, British Columbia, Manitoba, New Brunswick, Newfoundland, Northwest Territories, Nova Scotia, Ontario, Prince Edward Island, Quebec, Saskatchewan and Yukon have their own code for entry into the State field. Note: Canadian addresses must include the city in the **City** field and the Province in the **State or Province** field.

International State and Provinces (excluding Canada) are entered in the **City** field, NOT in the **State or Province** field. This field should be blank for all international addresses.

See the "Validation Table Dictionary" for additional information regarding validation table: **STVSTAT: State or Province Codes.**

5.A.9. 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 plus four) zip code is available. If the last four digits are unavailable, enter the first five digits in the first five positions of the field without the hyphen.

97203 97203-4798

For Canadian addresses enter the six-character postal code by keying in 3 characters, a space and the last 3 characters.

T2T 2Y5 R2L 1N4

See the "Validation Table Dictionary" for additional information regarding validation table: **GTVZIPC: Zip Codes.**

5.A.10. County

A county code is required for all United States Address. 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.A.11 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

See the "Validation Table Dictionary" for additional information regarding validation table: **STVNATN – Nation Codes**.

5.A.12 Telephone Type/Telephone

These fields are entered via the telephone form. See chapter 6.

5.A.13 Inactivate Indicator

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

5.A.14 Address Source

See the "Validation Table Dictionary" for additional information regarding validation table: **STVASRC Address Source Codes**.

5.A.15 Delivery Point/Corrective Digit/Carrier Route

Not used at the University of Northern Colorado.

5.B. Validation Tables

See the "Validation Table Dictionary" for additional information regarding the following Address related validation tables:

STVATYP	– Address Type Codes	STVSTAT	– State/Province Codes
GTVZIPC	– Zip/Postal Codes	STVCNTY	– County Codes
STVNATN	– Nation Codes	STVTELE	– Telephone Type Codes
STVASRC	– Address Source Codes		

5.C. Summary

- All address information should be entered in upper/lower case format.
- Do not use special characters (ex. &, %, #, etc.) in any address fields.
- Only use periods, slashes, and hyphens in the street number. (ex. 39.2 Rd).
- Use *st*, *nd*, *rd*, and *th* on numbered street names. (ex. 23rd Ave).
- Abbreviate street suffixes, unit designators, and compass directionals using standard abbreviations (ex. St, Ave, Rd, Ct, etc.).
- Only UNC Employees should have a 'CA' Campus Address.
- City, State, County, and Nation codes are populated automatically when entering a **Zip Code**.
- If necessary to manually enter **City Name**, spell it out in its entirety.
- Enter international addresses exactly as shown. (3 address lines available for use).
- International State and Provinces (excluding Canada) are entered into the **City** field.

6. Telephone Information

6.A. Standards

6.A.1. General

An entity (person or non-person) may have multiple telephone numbers within the Banner system. Telephone numbers should be accurate and reflect the most recent data received. Supplemental information for international phone numbers may be added in the international access code field.

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 as noted in 6.A.3. below.

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.A.2. Telephone Type

See the "Validation Table Dictionary" for additional information regarding validation table: **STVTELE: Telephone Type Codes**.

6.A.3. Telephone Numbers

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

a6.A.6.c. Area Code

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

b6.A.6.c. Phone Number

Enter the seven-digit number without inserting a hyphen.

3341756

c6.A.6.c. 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.A.4. 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 **Inactivate** indicator is set for a telephone number that is no longer valid.

6.A.5. International Access

a6.A.6.c. 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)

b6.A.6.c. 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 similarly 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 + 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.A.6. Comment

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

6.A.7. Address Type

Telephone Type Codes may be associated with a specific Address Type Code.

6.A.8. Sequence

This field is automatically populated by Banner.

6.B. 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. Standards

7.A.1. Gender

A Gender Code is required for all UNC employees and students. This information is maintained for federal and state reporting purposes.

7.A.2. Birth Date

A date of birth is required for all UNC 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.A.3. Age

This field is automatically calculated by Banner.

7.A.4. Social Security Numbers (SSN) and Taxpayer Identification Numbers (TIN)

A U.S. Social Security Number (SSN) should be entered into the **SSN/TIN** field for **Persons** and a Taxpayer Identification Number (TIN) should be entered into the **SSN/TIN** field for **Non-persons**.

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

A U.S. Social Security Number is required for all University of Northern Colorado employees and independent contractors.

While it is preferable that students disclose their social security number, an SSN is required only for students applying for financial aid, employment, or the College Opportunity Fund. A Social security number 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 or her Social Security Number or legal name changed within Banner.

The Human Resources office may enter and/or change Faculty and Staff Social Security Number information.

The Registrar's Office may enter and/or change Student Social Security Number information.

The Purchasing Office may enter and/or change Taxpayer Identification Number information.

7.A.5. Confidential Indicator

This field is used for students who do not want directory information released.

7.A.6. Deceased Indicator/Date

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.

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

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.

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

7.A.7. 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.A.8. Ethnicity

An **Ethnic Code** is required for all UNC 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 IPEDS required ethnicity codes **MUST** be entered for students and employees who are U.S. citizens or U.S. permanent residents:

African American Hispanic	Native American Caucasian	Asian American “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 United States permanent residents. The status of “Nonresident Alien” is available for these persons; however, this field is **NOT** a 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.A.9. Marital Status

A **Marital Status Code** is required for all UNC employees.

A copy of marriage license or 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.A.10. Religion

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

7.A.11. Legacy

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

7.A.12. Veteran Information

a7.A.6.c. Veteran File Number

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

b7.A.6.c. Veteran Category

See the "Validation Table Dictionary" for additional information regarding validation table:
STVVETC - Veteran Category Codes.

c7.A.6.c. Active Duty Separation Date

This field is used to enter the date that students and/or employees separate from UNC 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.

d7.A.6.c. 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.B. Validation Tables

See the "Validation Table Dictionary" for additional information regarding the following miscellaneous General Person validation tables:

STVCITZ	– Citizen Type Codes	STVETHN	– Ethnic Codes
STVETEC	– IPEDS Ethnic Codes	STVMRTL	– Marital Status Codes
STVRELG	– Religion Codes	STVLGCY	– Legacy Codes
STVVETC	– Veteran Category Codes		

8. E-mail Information

8.A. Standards

8.A.1. 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 UNC 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.A.2. E-mail Address

E-mail addresses follow a standard format. E-mail addresses consist of a login name followed by the '@' sign, followed by the domain name.

A domain name contains between two and four elements separated by periods. For example admissions.help@unco.edu is the address where UNC admissions questions can be sent.

Please refer to UNC's e-mail policy for details regarding UNC e-mail accounts.

8.A.3. Comment

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

8.B. Validation Tables

See the "Validation Table Dictionary" for additional information regarding validation table: **GTVMAL – Email Address Type Codes**.

9. Emergency Contact Information

9.A. Standards

9.A.1. General

This form is used to enter emergency contact information for persons.

9.A.2. Priority

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

9.A.3. Contact Name

See section 3.A.4

9.A.4. Relationship

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

9.A.5. Address

See sections 5.A.5 through 5.A.10

9.A.6. Telephone

See section 6.A.3

9.B. Validation Tables

See the "Validation Table Dictionary" for additional information regarding the following Emergency Contact validation table: **STVRELT – Relation Code**

Appendix A.2
Vendor "NonPerson" Change Form
Please PRINT legibly and Attach to W-9 form for processing

Date: _____

Request made by _____ Request Date: _____

Action Requested:

_____ Change NonPerson Vendor _____ Terminate NonPerson Vendor Services

Assigned Bear Number: _____

NonPerson 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 Student, Employee or Vendor "Person" 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 (Employee Name):	Data Steward Dept:	Date of Change:
FTMVEND			

Appendix A.3
“Person” and “NonPerson” Vendor Create Form
Please PRINT legibly and Attach to W-9 form for processing

Date Submitted: _____ Date Entered into Banner _____

Enter the Start Date for this Vendor (only if needed prior to entry date) _____

Request made by _____ Request Date: _____

Action Requested: ____ Setup New **“Person”** Vendor** ____ Setup New **“NonPerson”** Vendor***

** “Person” Vendors are individuals, who use a Social Security Number for Tax Identification Numbers.

*** “NonPerson” Vendors are Companies, Corporations, Partnerships and LLC’s that use a Taxpayer Identification number for Tax Identification purposes.

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

If Yes - Enter existing Bear Number _____

If No – Enter Bear Number Generated by the Banner System after creation of Vendor _____

Vendor Legal Name _____

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

DBA or Alias Bear Number _____

DBA or Alias Name _____

“Person Vendors”: Social Security Number (SSN) _____

(Check GUASYST and Common Matching to ensure that “Person” Vendor has not been previously set up in Banner as a Student and/or Employee and/or does not already exist as a “Person” Vendor.)

“NonPerson” Vendors: Taxpayer Identification Number (TIN) _____

(Check Common Matching to ensure that “NonPerson” Vendor has not been previously set up in Banner as a “NonPerson” Vendor.)

1099 Reportable ____ Yes ____ No

Type of Income _____

Vendor Type _____

Discount Code _____

Address Type _____

Default Address Type _____

Check Vendor Name _____

Check Vendor Name: _____

Address Line 1: _____

Line 1: _____

Line 2: _____

Line 2: _____

Line 3: _____

Line 3: _____

County _____

County: _____

State: _____

State: _____

Zip: _____

Zip: _____

Phone: _____

Phone: _____

FAX: _____

FAX: _____

Contact Person: _____

Other: _____

Appendix C–Abbreviations and Crosswalk Tables

C.1 Prefixes

Doctor	Dr	Miss	Miss	Professor	Prof
Father	Fr	Mister	Mr	Rabbi	Rabbi
Governor	Gov	Mistress	Mrs	Representative	Rep
Honorable	Hon	Miss or Madame	Ms	Reverend	Rev
Judge	Judge	President	Pres	Senator	Sen

C.2 Suffixes

Chief Executive Officer	CEO	Doctor of Veterinary Medicine	DVM	Doctor of Laws	LLD
Chief Financial Officer	CFO	Doctor of Education	EdD	Doctor of Medicine	MD
Certified Public Accountant	CPA	Esquire	Esq	Doctor of Optometry	OD
Doctor of Chiropractic	DC	The Second	II	Doctor of Philosophy	PhD
Dean	Dean	The Third	III	Retired	Ret
Dentist	DDS	The Fourth	IV	Registered Nurse	RN
Doctor of Dental Medicine	DMD	Juris Doctor	JD	Senior	Sr
Doctor of Osteopathy	DO	Junior	Jr		

C.3 Address Abbreviations

Apartment	Apt	Highway	Hwy	Southeast	SE
Building	Bldg	Lane	Ln	Southwest	SW
Boulevard	Blvd	North	N	Square	Sq
Branch	Br	Northeast	NE	Station	Sta
Center	Ctr	Northwest	NW	Street	St
Court	Ct	Number	No (only if necessary)	Suite	Ste
County Road	Cty Rd	Parkway	Pkwy	Terrace	Ter
Circle	Cir	Place	Pl	Trail	Trl
Department	Dept	Road	Rd	Trailer	Trlr
Drive	Dr	Room	Rm	Unit	Unit
East	E	Route	Rt	Way	Way
Estate	Est	Rural Route	Rr	West	W
Floor	Fl	South	S		

C.4 North American Numbering Plan (NANP)

Country	Area Code	Country	Area Code
Alberta	403/780	Montserrat	664
Anguilla	264	New Brunswick	506
Antigua	268	Newfoundland	709
Bahamas	242	Northern Marianas Islands (Saipan, Rota & Tinian)	671
Barbados	246	Nova Scotia	902
Barbuda	268	Ontario	416/519/647/705/807/905
Bermuda	441	Puerto Rico	787/939
British Columbia	250/604/778	Quebec	418/450/514/613/819
British Virgin Islands	284	Saskatchewan	306
Cayman Islands	345	St. Kts/Nevis	869
Dominica	767	St. Lucia	758
Dominican Republic	809	St. Vincent and Grenadines	784
Grenada	473	Trinidad and Tobago	868
Guam	671	Turks and Caicos Islands	649
Jamaica	876	U.S. Virgin Islands	340
Manitoba	204	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 MDY (Month, Day, Year).

Banner determines which parts of a date entry are the month, day and year, and automatically converts and stores the date in the format DD-MON-CCYY

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 5th 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 Quickflow Names

The names of quickflows created within any module of Banner are stored in a common validation table call GTVQUIK. Quickflow names can be up to 4 characters long.

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

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

'X' – indicates a module uses the table

'XS' – indicates the Module which is the Data Steward for the table

Table	Description	Student	Financial Aid	Finance	Human Resources	General	Table Steward
FTVACCI	Account Index Code	X	X	XS	X		Financial Services
FTVACCT	Account Code	X	X	XS	X		Financial Services
FTVACTV	Activity Code	X	X	XS	X		Financial Services
FTVCOAS	Chart of Accounts	X	X	XS	X		Financial Services
FTVFUND	Fund Code	X	X	XS	X		Financial Services
FTVLOCN	Location Code	X	X	XS	X		Financial Services
FTVOBUD	Budget ID and Phase	X	X	XS	X		Financial Services
FTVORGN	Organization Code	X	X	XS	X		Financial Services
FTVPROG	Program Code	X	X	XS	X		Financial Services
GTVCCRD	Cross Product Credit Card Types	X	X	XS	X		Financial Services
GTVMCSC	Common Matching Source Codes	X	X	X	X	XS	Proj Mgmt Team
GTVCURR	Currency Codes	X	X	XS	X		Financial Services
GTVDICD	District Division Codes	X	X	X	X	XS	Proj Mgmt Team
GTVDUNT	Duration Unit Codes	XS	X	X	X		Registrar
GTVEMAL	Email Address Types	XS	X	X	X		Registrar
GTVEXPN	Expenses – Not currently used					XS	Proj Mgmt Team
GTVFDMN	FGA Domain Codes	X	X	X	X	XS	Proj Mgmt Team
GTVFDTP	FGA Domain Type Codes	X	X	X	X	XS	Proj Mgmt Team
GTVINSM	Instructional Method Codes	XS	X	X	X		Registrar
GTVLETR	Letter Codes	X	X	X	X	XS	Proj Mgmt Team
GTVMAIL	Mail Type – Not Currently Used					XS	Proj Mgmt Team
GTVMTYP	Meeting Type Codes	XS	X	X	X		Registrar
GTVNTYP	Name Type	XS	X	X	X		Registrar
GTVPARA	Paragraph Codes	X	X	X	X	XS	Proj Mgmt Team
GTVPARS	Partition Codes	X	X	X	X	XS	Registrar
GTVSCHS	Scheduling Status Codes	X	X	X	X	XS	Registrar
GTVSCOD	EDI/ISO Standard Code	X	X	X	X	XS	Info Tech
GTVSUBJ	Subject Index	X	X				Registrar
GTVTRTP	EDI Transaction Type – Not used	X	X	X	X	XS	Info Tech
GTVZIPC	ZIP/Postal Code	X	X	X	X	XS	Info Tech
GXVDIRD	Bank Routing Number	X	X	X	XS		HR/Payroll
STVACAT	Degree Award Category	XS	X	X	X		Admissions
STVACCG	Activity Category	XS	X	X	X		Admissions
STVACTC	Activity Code	XS	X	X	X		Admissions
STVACTP	Activity Type	XS	X	X	X		Admissions
STVACYR	Academic Year Code	XS	X	X	X		Registrar
STVADMR	Admission Request Checklist Codes	XS	X	X	X		Admissions
STVADMT	Admission Type	XS	X	X	X		Admissions
STVAPDC	Admissions App Decision Codes	XS	X	X	X		Admissions
STVAPST	Admission Application Status	XS	X	X	X		Admissions
STVASCD	Room Assignment Status	XS	X				Registrar
STVASRC	Address Source	XS	X	X	X		Registrar
STVASTD	Academic Standing Codes	XS	X				Registrar
STVASTY	Assignment Type Codes	XS	X				Registrar
STVATYP	Address Type Code	XS	X	X	X		Registrar
STVBCHR	Background Institution Codes	XS	X	X	X		Registrar
STVBLDG	Building	XS	X	X	X		Registrar/Finance
STVCAMP	Campus Code	XS	X	X	X		Registrar
STVCIPC	CIP Code	X		X	X	XS	Inst Research

Table	Description	Student	Financial Aid	Finance	Human Resources	General	Table Steward
STVCLAS	Class Code	XS	X	X			Registrar
STVCNTY	County Code	XS	X	X	X		InfoTechnology
STVCOLL	College Code	XS	X		X		Registrar
STVCOMT	Committee/Service Type	X	X		X		Registrar
STVCTYP	Contact Type	XS	X				Admissions
STVDAYS	Days of the Week	XS	X	X	X		Registrar
STVDEGC	Degree Code	XS	X		X		Registrar
STVDEPT	Department Code	XS					Registrar
STVDISA	Disability Codes	XS	X		X		Registrar
STVDIVS	Division	XS	X		X		Registrar
STVDLEV	Degree Level	XS			X		Registrar
STVDPLM	Diploma Type	XS	X		X		Registrar
STVEMPT	Employment Type	XS	X		X		Graduate School
STVESTS	Enrollment Status	XS	X	X	X		Registrar
STVETCT	IPEDS Ethnic Codes	XS	X		X		Registrar
STVETHN	Ethnic Code	XS	X		X		Registrar
STVETYP	Event Type (Not Used)	XS					Registrar
STVFCNT	Faculty Contract Codes	X	X	X	XS		Human Resources
STVGEOG	Geographic Region Division	XS	X				Registrar
STVGEOR	Geographic Region Code	XS	X				Registrar
STVGMOD	Grading Mode Code	XS	X				Registrar
STVHAPS	Housing Application Status	XS	X	X			Registrar
STVHLDD	Hold Type	XS	X				Registrar
STVHOND	Departmental Honors Code	XS	X		X		Registrar
STVHONR	Institutional Honors Code	XS	X				Registrar
STVINFC	Interface Codes	X	X	X	X	XS	Info Tech
STVINIT	Initials Code (Not Used)	XS					Admissions
STVLANG	Language	XS			X		Graduate School
STVLEAD	Leadership	XS	X		X		Registrar
STVLEVL	Level Code	XS	X		X		Registrar
STVLGCY	Legacy (Not Used)	XS					Registrar
STVMATL	Materials Codes	XS	X	X	X		Admissions
STVMAJR	Major/Minor/Concentration Code	XS	X		X		Registrar
STVMDEQ	Medical Equipment Code	X			X		Registrar
STVMEDI	Medical Code	X			X		Registrar
STVMRCD	Meal Rate	XS	X				Registrar
STVMRTL	Marital Status Code	X	X		XS		Human Resources
STVMSCD	Meal Assignment Status	XS	X				Registrar
STVNATN	Nation Code	XS	X	X	X		Registrar
STVORIG	Originator Code	XS	X	X	X		Registrar
STVPENT	Port of Entry Code	XS	X	X	X		Graduate School
STVPRCD	Phone Rate Codes	XS		X	X		Registrar
STVPYTP	Source Contact Person Type Codes	XS	X				Registrar
STVRATE	Student Fee Assessment Code	XS	X				Registrar
STVRDEF	Building/Room Attribute	XS	X				Registrar
STVRELG	Religion Code (Not Used)	XS					Registrar
STVRELT	Relation Code	X			XS		Registrar
STVRMST	Room Status	XS	X				Registrar
STVRRCD	Room Rate	XS	X				Registrar
STVRSTS	Registration Status Codes	XS	X				Registrar
STVSBGI	Source/Background Institution Codes	XS	X		X		Admissions
STVSITE	Site Codes	XS	X				Registrar
STVSPON	International Student Sponsor	XS	X				Graduate School
STVSTAT	State/Province Code	XS	X	X	X		InfoTechnology
STVSTST	Student Status	XS	X				Registrar

STVSTYP	Student Type Codes	XS	X				Registrar
STVSUBJ	Subject Codes	XS	X				Registrar
STVTADM	Test Score Administration Type	XS	X				Registrar
STVTELE	Telephone Type	XS	X	X	X		Registrar
STVTEPR	Test Purpose	XS	X				Registrar
STVTERM	Term Code	XS	X	X	X		Registrar
STVTESC	Test Code	XS	X				Admissions
STVTSRC	Admission Test Score Source	XS	X				Admissions
STVVETC	Veteran Type	XS	X				Registrar
STVVVYP	Visa Type	XS			X		Graduate School
STVWACK	Web Acknowledgement Codes	XS	X				Registrar
STVWDRL	Student Withdrawal Status Codes	XS	X				Registrar

	Registrar
	Admissions
	Financial Services
	Human Resources/Payroll
	Graduate School
	Information Technology
	Institutional Research
	Project Mgmt team

Appendix F – Current Data Standards Team Members

Data Standards Team Members:

- Becky Barnes, Registrar's Office (Data Steward)
- Guy Brenckle, Office of Budget and Institutional Analysis
- Kelley Christman, Registrar's Office
- Donni Clark, Director of Student Financial Aid (Data Steward)
- Krystal Dilka, Payroll Services (Data Steward)
- John Godman, Information Technology
- Mark Gonzales, Information Technology
- Diana Suhr, Office of Budget and Institutional Analysis (Data Steward)
- Gary Gullickson, Admissions (Data Steward)
- Joyce Hays, Registrar's Office
- Geri Landwehr, Bursar's Office (Data Steward)
- Deb Meyer, Payroll Services
- Marshal Parks, Human Resources (Data Steward)
- Linda Sisson, Graduate School (Data Steward)
- Mary Sorensen, Internal Auditing (Chair)

Dan Tacker, Banner Implementation Project Manager (Data Steward)