



WICHITA STATE
UNIVERSITY

Data Standards



Data Entry Standards for General Person

Last revised: June 23, 2008

Confidential Business Information

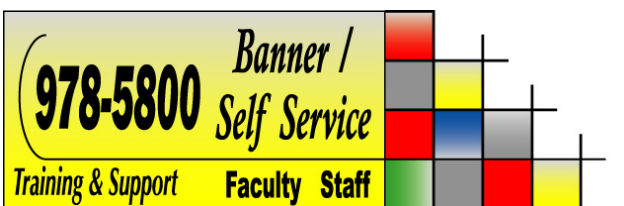
This learning guide is based upon SunGard Higher Education Banner documentation. This document is for use at Wichita State University for the purpose of training; the information contained is considered confidential.

Prepared By: Wichita State University
UCATS Banner User Services
Institutional Research

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Data Entry Standards for General Person

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| Overview | Section A |
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Session Overview

| | |
|--------------------------|--|
| Introduction | Data Standards Guidelines is intended to define a common set of practices and shared field values for all Banner users at Wichita State University and data definitions for all data elements within Banner. |
| Intended Audience | Wichita State University personnel requiring access to Banner |

Learning Guide Icons

In the Banner learning guides, icons may be used to highlight important information.



Indicates an important trap to avoid.



Indicates a shortcut or tip.



Indicates an important **warning** regarding the form or data entry.



Indicates hands-on exercise or activity.



Training Information

| | |
|---------------------------|---|
| Training Resources | Banner learning guides (PDF and on-line) and other helpful information are located under Training Resources on myTools . |
| Training Schedule | <p>Training/Workshop Registration is located on myTools.</p> <ul style="list-style-type: none"> ➤ Register button – View session description, dates/times and/or register for training. ➤ Session button – View or drop individual registrations. |

| | |
|----------------------------|----------------------|
| Contact Information | Section B |
|----------------------------|----------------------|

Help Desk Contact Information

? *In Self Service, look for this icon to view On-Line Help
(Self Service is accessed through myWSU)*

| <i>Type of Question</i> | | <i>Contact</i> |
|---|--|---|
| <p>Passwords e-mail hardware, software</p> <p style="text-align: center;"><u>Students</u> myWSU and Self Service</p> |  <p>316-978-HELP HelpDesk@wichita.edu</p> | <p style="text-align: center;">University Computing Help Desk</p> <p style="text-align: center;">Ken Pavlicek Jessica Wolf Brenda Johnson Marguerite Schmidt</p> |
| <p><u>Faculty</u> <u>and</u> <u>Staff</u></p> <p style="text-align: center;">Training & Support</p> <p style="text-align: center;">Banner myWSU Self Service Reporting Services</p> <p style="text-align: center;">Training Registration Training Resources</p> |  <p>316-978-5800 BannerHelp@wichita.edu http://mywsu.wichita.edu > myTools > WIN Tools</p> | <p style="text-align: center;">Banner User Services</p> <p style="text-align: center;">Becky North Jennifer Snyder</p> |

Banner Functional Experts Contact Information

Banner User Services (978-5800) assists users with Banner, Self Service and Reporting Services information covered in training.

Functional Experts assist users with “deeper” policy and procedure questions.

Data Standards Committee

| | | |
|---------------------|------|--------------------------|
| Donna Hawley, Chair | 3015 | Donna.Hawley@wichita.edu |
|---------------------|------|--------------------------|

Data Integrity Committee

| | | |
|---------------------|------|--------------------------|
| David Wright, Chair | 7157 | David.Wright@wichita.edu |
|---------------------|------|--------------------------|

WIN Office

| | | |
|----------------------------|------|-----------------------|
| Mike Wood, Project Manager | 7750 | Mike.Wood@wichita.edu |
|----------------------------|------|-----------------------|

| | | |
|--|------|-------------------------|
| Doris Anton (Lab Reservation & Printing) | 5062 | Doris.Anton@wichita.edu |
|--|------|-------------------------|

| | |
|-------------------------------|----------------------|
| Identification Numbers | Section C |
|-------------------------------|----------------------|

Overview

Within Banner each person or vendor is entered only once. The first time a person or vendor is entered into Banner, three identification numbers are generated. These numbers are unique to the individual or vendor. The three types are as follows:

- **PIDM:** an automatically generated ID within Banner. The PIDM is stored internally in Banner and is not visible to most users of Banner or Self-service Banner.
- **Banner ID:** This ID has nine characters (X followed by an eight-digit number) that appears in the "ID" field on Banner forms that pertain to that person's record
- **myWSU ID:** The *myWSU* ID or the publicly viewable identification number is generated. Its configuration includes a character, 3 numbers, character, 3 numbers.

Each of these IDs are unique to the individual and do not change over time. The *myWSU* ID is the ID that will be used for logging in to both Banner and Self-Service Banner.

Social Security Numbers

Social Security numbers will be captured as an informational item and can be used as search criteria. Social Security number validation procedures will be established to fulfill legal requirements. Prior to making changes to the SSN field, the change must be validated by examining appropriate documentation.

FEIN Numbers

In addition, either the Federal Identification Number (FEIN) or the SSN will be used as alternate search criteria. SSN's will be used in the case where there is no Federal Identification Number. Generally, these fields should not be left blank, nor should they be filled with zeros or filled with repeating characters.

Duplicate PIDs

Efforts are made during data entry to prevent entering the same person or vendor twice and producing what is called a “duplicate PIDM.” A single PIDM and thus a single Banner ID and *myWSU* ID for each person or vendor is **critical**.

“Duplicate PIDM” is actually a misnomer and is presented only to alert those entering data of the terminology used by Banner materials and in discussion with other Banner Schools. In reality the term “Duplicate PIDM” refers to the situation where a unique person or vendor has been assigned multiple PIDMs. A person with two different PIDMs has two distinct sets of records. Since the term *myWSU* ID is more familiar to everyone, we will refer to this situation as multiple *myWSU* IDs for the same person.



When a person has more than one *myWSU* ID, it will be impossible to maintain accurate records for that person. More than one *myWSU* ID for a person can lead to disastrous situations, e.g., a person has employee records under one *myWSU* ID and payroll records under another *myWSU* ID, or academic records under both *myWSU* IDs and an incomplete transcript for both IDs.

A person/vendor with more than one *myWSU* ID is identified if one of the following is true:

- Two persons have the same SSN and the SSN is accurate.
- Two vendors have the same FEIN and the FEIN is accurate.

A potential person/vendor with more than one *myWSU* ID is identified if one of the following is true:

- Two persons have the same Name and Birth date
- Two persons have the same SSN and Name and Birth date
- Two persons have the same SSN and Birth date
- Two persons have the same SSN and Name

Each person creating a new person or vendor must be diligent in preventing these multiple records. **If someone creates, discovers or believes that there is more than one *myWSU* ID for a person, he/she will follow the procedures described below and any specific procedures unique to the department. Data entry for that person must cease until the issue is resolved.**



Protocol for Avoiding Duplicate PIDMs

More than one *myWSU* ID can be inadvertently created when proper searching using the common matching protocol is not followed and a new record is created even though the person is already in the system.

Those who enter new persons into the database must use Common Matching Procedures as developed for each area entering persons or vendors or verifying tape loads. These procedures are as follows:

Finance

Search for a duplicate FEIN number. If none are found, the new vendor may be added to the system.

**Under-graduate
Domestic
Admissions**

For on-line applications, General Person common matching processes are used. Matching manually is not currently feasible. When potential matches are identified, processes are suspended. Staff review records individually and create new persons as necessary.

**International
Admissions**

Because Common Matching does not work well for international names, all staff in International Education will thoroughly search for students on SOAIDEN (using all names) before attempting to create a new record. If the student is not found using SOAIDEN, a new record will be created after entering information on the Common Matching form (GOAMTCH).

When a student applies online, information is automatically fed into Banner from the online application. Although the online application is subjected to common matching rules, these rules do not work well with international names and a duplicate PIDM may be unavoidably created. If a duplicate PIDM was created during the online application load, International Admissions will follow the protocols established in this guide to correct/remove the duplicate PIDM.

Continued on next page

Protocol for Avoiding Duplicate PIDMs, Continued

**Graduate
School
Admissions**

Initially, staff search GUIALTI using all names, SSN, and DOB if available. Employees responsible for data entry will thoroughly search for students on SOAIDEN (using all names) before attempting to create a new record. If the student is not found using GUIALTI or SOAIDEN, a new record will be created using GOAMTCH.

When a student applies online, information is automatically fed into Banner from the online application. Although the online application is subjected to common matching rules, these rules do not work well with international names or for students who attended under a different name (and did not provide SSN or DOB as possible matching criterion) and a duplicate record may be unavoidably created. In this situation, Graduate School staff will follow the protocols established in this guide to correct/remove the duplicate PIDM.

Alumni

For online applications, General Person common matching processes are used. When potential matches are identified, processes are suspended. Staff review records individually and create new persons as necessary.

**Shocker Card
Center**

If the Card Center identifies a student with two IDs, Nancy Thompson, Joann Antes, or Jim Rogers will be notified in the priority order listed. A new ID card should not be made for a student who already has an ID in the system.

Protocol for Repetitive PIDM Duplication

The creation of a duplicate PIDM causes a tremendous amount of work for several departments. Employees who create duplicate PIDMs repeatedly are subject to disciplinary actions ranging from additional training to other appropriate action.

Procedure for Multiple Record PIDM (MRP) Correction

General Principles

1. Only Human Resources may mark an HR record as a duplicate.
2. If a student has a SGASTDN record, only the Registrar may mark a card as duplicate.
3. Duplicate admission/recruit records will be made by the Admission Offices.

MRP Reps

Functional Area MRP Representative

Each functional area will designate a person responsible for handling the MRPs identified within their area. The MRP Representative should be an advanced user familiar with all forms within the functional area and any interfaces with other functional areas. The MRP Representative is the main liaison between end-users and UCATS in discovery, resolution and prevention of MRPs.

| MRP Representatives | | | |
|----------------------------|-------------------|----------------------------|------------|
| Unit | Name | Email | ext |
| Alumni | Stacy Salters | stacy.salters@wichita.edu | 3825 |
| Card Center | David Kidd | david.kidd@wichita.edu | 7070 |
| Finance | Edna Bates-Tosses | edna.bates@wichita.edu | 5988 |
| Financial Aid | Regina Krob | regina.krob@wichita.edu | 5028 |
| Graduate School | Denise Canoles | denise.canoles@wichita.edu | 6243 |
| Human Resources | Nancy Thompson | nancy.thompson@wichita.edu | 6162 |
| International Education | Vince Altum | vince.altum@wichita.edu | 3232 |
| Registrar | Bill Wynne | bill.wynne@wichita.edu | 3672 |
| Undergraduate Admissions | Bobby Gandu | bobby.gandu@wichita.edu | 3123 |

Procedure for MRP Correction, Continued

Discovery of MRPs

UCATS will institute data audits of MRPs on a daily basis to be available on the web for viewing by MRP Representative.

End-users within functional areas who discover or create MRPs should immediately notify their functional area MRP Representative.

MRP reps will notify UCATS of MRPs not listed in the daily data audits. UCATS will investigate and determine whether additional coding is necessary to capture the newly discovered MRPs. MRP Representative will also notify UCATS when the data audit generates records which are not to be considered as duplicates

UCATS generated data audits will include:

- record identification
- functional areas affected
- record content and location
- user/unit responsible for data creation/modification of record

Continued on next page

Procedure for MRP Correction, Continued

Resolving MRPs

The MRP Representative is responsible for the correction of any MRPs identified or the delegation of such responsibility.

If a MRP exists within a **SINGLE functional area**, the functional area should have written procedures about the process of correcting MRPs including:

- How to determine which record(s) should be the “good” or primary record.
- Process for moving data from “bad” to “good” records.
- What type of data can NOT be altered?

If a MRP exists **among MULTIPLE functional areas**:

A meeting or communication must be held involving all affected functional areas MRP Representatives to establish which records/content must be changed and who will have responsibility for the record change.

If the departments involved cannot resolve the issue, the chair of the data standards committee (Donna Hawley) or the chair of the data integrity committee (David Wright) should be contacted.

Suggested protocol for correcting MRPs includes:

1. Move all data that needs to be moved for your functional area to the “correct/good” record
2. Delete this same data (as permitted by the system) from the ‘bad’ record.
3. Check general person data along with your functional area data for change
4. On the “bad” record:
 - A) Add the **Name Type** of “DUPL”
 - B) Delete the following if present on the “bad” record
 1. Date of birth
 2. SSN (leave if employee)

Records which cannot be removed or merged must be identified as a permanent duplicate record.

Continued on next page

Procedure for MRP Correction, Continued

Preventing MRPs

UCATS will maintain a database of known MRPs including the classification of:

- MRP type
- Functional areas affected
- End-user/unit ID for record creation/modification
- Frequency, quantity, date/time of MRP events

MRP representatives will have access to the UCATS MRP database to review MRP event frequency for their functional area and will be responsible for instituting practices to eliminate the occurrence of MRP events.

Procedure for Marking a Record as Duplicate

Procedure for marking a record as a Duplicate:

1. On SPAIDEN, mark name type as DUPL
2. Change last name to DUPLICATE RECORD
3. Leave first name as is
4. Save the record (F10 or the save icon)

When a name change is done on the **Current Identification** tab (current name is changed), the previous name is automatically moved to the **Alternate Identification** tab, and should remain there.

In many cases, we have corrected the entry that was previously "DELETE RECORD", and changed the current name to DUPLICATE RECORD, or even corrected a misspelling of duplicate or record – thus creating an incorrect entry on the Alternate Identification tab. In order to remove a "bad" entry on the Alternate Identification tab, follow these steps:


- Select the name entry to be removed by moving your arrow keys or clicking on the name entry. It will be highlighted if you have selected it properly. Again, remove ONLY "bad" records – never remove the original entry that included the full name of person.
- Once the record is highlighted, do a record remove (Shift-F6, or select the record remove option either from the tool bar or from the "Record" drop down). You will be warned that you will delete that record. Verify that you are about to delete the correct name entry, then select Continue. You will see the name is immediately removed from the form.
- Save the record (F10 or the save icon)

Approved by Ad Hoc Data Standards Committee on 7/13/2007.

Basic Guidelines for Data Entry

Section

D

- Perform search following the common matching procedures
- **Do not generate a new person/non-person ID until the common matching procedures are completed even if time is short.**
-  ➤ **Do not use the pound sign (#) or the percent sign (%) in any data field, for any reason.**
- Use proper keyboard characters when entering numeric data:
 - Use a numeric 1 (one), not a capital "I" (i) or lowercase "l" (L).
 - Use a numeric 0 (zero), not a capital "O" (o).
- Enter punctuation in names and addresses ONLY when it is a required part of the official, legal name. (Example: O'Leary). See Name Standards below for details.
- Enter all data using mixed case (uppercase and lowercase) and standard capitalization rules.
- Be knowledgeable of the forms and the fields within the forms in which you are allowed to enter data.
- Double-check that the data on any paperwork matches the data that is being entered into Banner.
- Use the data entry rules specific to the field that is being updated.
- Do not perform tasks that you have not been trained in or received security approval even if one is able to do so.
- Do not override the Runner Technologies software unless authorized to do so.



When left in the default mode, searches in Banner search forms are case sensitive. To minimize chances of error when searching, be sure to select "No" in the "Case Sensitive Query?" option at the bottom of the forms.

Name Standards - Persons

Section E

A person's name is entered on one of the following forms:

- **SPAIDEN** (Student/FA modules)
- **PPAIDEN** (HR module)
- **FOAIDEN** (Finance module)
- **APAIDEN** (Alumni)

All name field information is to be entered using mixed case (standard combination of upper and lower case letters). Enter the spelling and format of the name as supplied by the person.

International students: For immigration reasons, international student names will be entered in Banner exactly as listed on their passport. After the student's passport name has been documented, the Office of International Education will change the name type to LEGL."

Examples of various name characteristics and how they are to be entered into Banner follow the discussion of the individual fields.

Name Changes

In order to process a name change, the person should have filled out a "Name Change" form and attached documentation.

- Check the person's appearance (if in-person) against his/her photo ID.
- A photo ID or copy of a photo ID is always required to help ensure that the person requesting the change is that person.



DATA Standards must be followed when entering or changing names.

Alumni has a different procedure to instigate a name change. Alumni will verify before any name change that the person is not a current or pre-enrolled student or current employee.

Continued on next page

Name Changes, Continued

Which office makes the change?

To determine which office processes the name change, look at the person's record on the System Identification form (GUASYST).

The screenshot shows the 'System Identification GUASYST 7.2 (PROD)' window. At the top, there is an 'ID:' field with a dropdown arrow and a text input box. Below this, the form is organized into six columns, each representing a functional area with several checkboxes and some text input fields:

| STUDENT | HUMAN RESOURCE | ADVANCEMENT | FINANCIAL AID | FINANCE | ACCOUNTS RECEIVABLE |
|--|---------------------------------------|---------------------------------------|------------------------------------|--|--|
| <input type="checkbox"/> Recruiting | <input type="checkbox"/> Applicant | <input type="checkbox"/> Individual | <input type="checkbox"/> Applicant | <input type="checkbox"/> Agency | <input type="checkbox"/> Accounts Receivable |
| <input type="checkbox"/> Admissions | <input type="checkbox"/> Employee | Category: <input type="text"/> | | <input type="checkbox"/> Bank | |
| <input type="checkbox"/> Transfer Work | <input type="checkbox"/> Beneficiary | Class: <input type="text"/> | | <input type="checkbox"/> Customer | |
| <input type="checkbox"/> General Student | <input type="checkbox"/> Cobra Person | <input type="checkbox"/> Organization | | <input type="checkbox"/> Employee | |
| <input type="checkbox"/> Registration | | Category: <input type="text"/> | | <input type="checkbox"/> Financial Manager | |
| <input type="checkbox"/> Housing | | | | <input type="checkbox"/> Vendor | |
| <input type="checkbox"/> Faculty | | | | | |

A. If there is nothing checked under **Student**, then the functional areas that are checked should make the change.

- If only **Recruiting and/or Admissions** is checked under **Student**, then the appropriate Admissions Office makes the change.
- If only something under **Human Resources** is checked, that office makes the change.
- If only something is checked under **Advancement**, then Alumni makes the necessary change.
- If only something under **Finance** is checked, then Financial Operations makes the change.

NOTE: Financial Aid does not make name changes – anyone added to the Financial Aid system is also added to Admissions as a recruit, giving Admissions the responsibility for name changes if **General Student** or something under **Human Resources** is not checked. The person must supply a copy of their Social Security card with the new name.

Continued on next page

Name Changes, Continued

Which office makes the change?

- B. If **General Student** is checked and **nothing** under **Human Resources** is checked, the person must supply a copy of their Social Security card with the new name. Other than students who are also active employees, only the Registrar's Office will change the current name of any student.
- The Registrar's Office must verify the name change/SSN with the Social Security Administration before making any change. This can be done by phone. The new social security card, after this verification, is adequate evidence of a legal name change.
 - If a person cannot or will not provide a copy of their new social security card and if anything is checked on GUASYST under **Human Resource**, the Registrar's Office will not make the change.
 - If an International Student does NOT have something checked under **Human Resource**, then just a copy of their passport is required (which the Registrar's Office will compare to the contents of their Admissions folder).

Continued on next page

Name Changes, Continued

Which office makes the change?

C. If **General Student** is checked and anything is also checked under **Human Resource**, the person must supply a copy of their Social Security card with the new name. Call 978-3065 and ask if the person is an active employee. Only Human Resources will change the name of any **active employee**.

- If the person is an **active employee**, send the paperwork to Nancy Thompson in Human Resources, and they will make the change. *Human Resources will notify the Registrar's Office if they change the name of an employee who is also a student.*
- If the person is **not an active employee**, the Registrar's Office makes the change.

The Social Security card requirement also applies to International Students who have something checked under **Human Resource**. Their passport alone will NOT suffice.



NOTE: If there is one name/SSN mismatch between our payroll file and Topeka's file, **the entire payroll gets scrubbed.** Checked revised document for active employee report.

D. If **General Student** is checked, and the person's SS card is not involved (and in certain cases it **MUST** be, as stated above), then the same documentation of a legal name change that has been required for years, will be required.

E. If name type is ALUM, then the Alumni Office can change that name. Unless the person only exists under **ADVANCEMENT** (see GUASYST), the ALUM name type will not be the current name.

This material was approved by the Ad Hoc Data Standards Committee, 8/8/2007.

General Punctuation

Hyphens Hyphens (-) may be used to separate double last names or first names, e.g. King-Anderson. (International students frequently have hyphenated first names.)

Apostrophes Apostrophes (') must be used in such names as O'Leary, O'Connor, etc.

Never use the following punctuation symbols in the last, first or middle name

| | |
|------------------|-----|
| Comma | , |
| Double quotation | “ ” |
| Parentheses | () |
| Percent sign | % |
| Period | . |
| Pound sign | # |

In an abbreviation of a person's name (e.g., R John Smith, John R Smith) the initial should be placed in the appropriate field without the period.

Last Name

There should be no spaces within single-word last names. For example, type in McDonald, NOT Mc Donald. The following are exceptions to this rule:

St _____ (e.g. St John)
 van _____ (e.g. van der Rohe)
 von _____ (e.g. von Essen)

Exceptions can also be made when an individual requests that space(s) appear between syllables of his/her last name.

In instances where there are two last names that are un-hyphenated e.g., Mary Elizabeth Creton Quinton, Mary would be entered as first Name, Elizabeth would be entered as the Middle Name and Creton Quinton would be entered as Last Name.

Do NOT use titles, prefixes, and suffixes (e.g., Dr, Mr., Mrs., III, Jr, etc.) in the last name field.

First Name

The First Name should be the proper first name, or legal first name for the LEGL (Legal) name type. A nickname can be entered in the NICK name type or in the Preferred (First) Name field.

- If no first name exists, FNU (i.e. first name unknown) is used.
 - Spaces are permitted for double first names, e.g., Mary Ann, Bobby Joe.
 - Do NOT use titles, prefixes, and suffixes (e.g., Dr, Mr., Mrs., III, Jr, etc.) in the first name field.
-

Single Character First Names

One letter first names should be entered without a period. In those cases where a single character is designated as first name and followed by a middle name, place the single character in the first name field and place the second name in the middle name field.

Examples:

| | First Name | Middle Name |
|-----------|------------|-------------|
| R Maureen | R | Maureen |
| F Robert | F | Robert |

Middle Name

Middle names or middle initials should be entered when available. The Middle Name should be the proper middle name, or legal middle name, for the LEGL (Legal) name type if one exists. Otherwise, if just an initial is provided for the middle name, enter the initial **without** a period.

- If no middle name or initial is provided leave the Middle Name field blank.
 - Spaces are permitted between multiple names.
 - Do **NOT** use titles, prefixes, and suffixes (e.g., Dr, Mr., Mrs., III, Jar, etc.) in the first name field or any name field.
-

Individual Prefix

This data element can be used for letter generation, labels and/or envelopes. The maintenance of this table is the responsibility of the data standards committee. Below is a list of acceptable prefixes:

| Code | Description |
|------|-------------|
| Capt | Captain |
| Dean | Dean |
| Dr | Doctor |
| Rev | Reverend |
| Pres | President |
| Prof | Professor |
| Sr | Sister |
| Fr | Father |
| Lt | Lieutenant |

Suffix

The suffix should be used only for official designations (e.g. JR) in a name and NOT for academic credentials (e.g. PhD). Acceptable suffices are listed below.

| Code | Description |
|------|-------------|
| Esq | Esquire |
| Jr | Junior |
| Sr | Senior |
| II | The Second |
| III | The Third |
| IV | The Fourth |
| V | The Fifth |

Preferred (First) Name (Optional)

Preferred first name should be entered into the preferred first name field. Example, if Christopher Paul Smith wants to be referred to as Paul then Paul would be entered into the Preferred Name field. Further examples would be entering Jim for James or Chris for Christine if such a name is preferred. Likewise, as in the first example with Christopher Paul Smith, if the middle name is preferred over the first name, enter the middle name into this field.

Do not enter nicknames into the Preferred Name field. These should be entered in the NICK name type.

Name Examples

| Example 1: | Mr. John D van de Water II |
|-----------------------|----------------------------|
| Last Name: | van de Water |
| First Name: | John |
| Middle Name: | D |
| Preferred First Name: | Johnny |
| Prefix: | Mr |
| Suffix: | II |

Name Examples, Continued

| Example 2: | Sr M Josepha O'Reilly |
|-----------------------|------------------------------|
| Last Name: | O'Reilly |
| First Name: | M |
| Middle Name: | Josepha |
| Preferred First Name: | |
| Prefix: | Sr |
| Suffix: | |

| Example 3: | Dr. Alesandra Elizabeth Tweedle de Baros |
|-----------------------|---|
| Last Name: | Tweedle de Baros |
| First Name: | Alesandra |
| Middle Name: | Elizabeth |
| Preferred First Name: | Zandy |
| Prefix: | Dr |
| Suffix: | |

| Example 4: | Miss Virginia DiPalmero |
|-----------------------|--------------------------------|
| Last Name: | DiPalmero |
| First Name: | Virginia |
| Middle Name: | |
| Preferred First Name: | Ginny |
| Prefix: | Miss |
| Suffix: | |

| Example 5: | Prof Tse Hei Ng |
|-----------------------|------------------------|
| Last Name: | Ng |
| First Name: | Tse Hei |
| Middle Name: | |
| Preferred First Name: | Joseph |
| Prefix: | Prof |
| Suffix: | |

| Example 6: | Cher |
|-----------------------|-------------|
| Last Name: | Cher |
| First Name: | FNU |
| Middle Name: | |
| Preferred First Name: | |
| Prefix: | |
| Suffix: | |

| | |
|--|----------------------|
| Name Standards – Non-Person or Vendor | Section F |
|--|----------------------|

All information is to be entered using mixed case (standard combination of upper and lower case letters). Enter the spelling and format of the name as supplied by the company to Wichita State University following the following guidelines described below.

Non-person names will be entered within the SCT Banner system on the following forms: Finance-Person Identification (FOAIDEN). Vendors who are people and not employees are entered as vendors who are persons and not as employees.

General Punctuation

Use periods, commas, hyphens, apostrophes, dashes, or spaces exactly as the vendor indicates in writing. Do not add punctuation where there is none.

The following should not be using in the name of a vendor unless part of the official name. # and % should never be used:

| Symbol Name | Symbol |
|------------------|--------|
| Comma | , |
| Double quotation | “ ” |
| Parentheses | () |
| Percent sign | % |
| Pound sign | # |

Hyphens Hyphens (-) may be used to separate double last names, e.g. King-Anderson.

Apostrophes Apostrophes (') may be used in such names as O’Leary, O’Connor, etc. if used in the official name of the vendor.

Period Period (.) is permitted when the non-person name is one word and ends in ‘.com’.

Periods are entered if they are part of the name. For example: I.C.U. Printing Company Inc.

Continued on next page

General Punctuation, Continued

Abbreviations and Periods In an abbreviation of a vendor's name with initials (e.g. R & S Paper), the initial should be placed in the appropriate field without a period.

Ampersand Ampersand (&) may be used in non-person names in which they occur.



The ampersand (&) can be used only when part of a formal name, use 'and' in all other cases.

Spacing Spaces are permitted between multiple names as needed. No spaces should appear before or after hyphens or apostrophes.

Articles as the First Word in Names

If an "article" (a, an, or the) is used as an adjective within the full legal name of a vendor entry, it should be included when entering the vendor name into Banner.

If a vendor name begins with the words 'The' or 'A', it should be included when entering the vendor name into Banner.

Abbreviations

Names should be spelled out as much as possible. In cases where the names are too long and need to be truncated, the following abbreviations must be used:

| | |
|----------------------------------|-------|
| Inc. or Incorporated | Inc |
| Company | Co |
| Corp. or Corporation | Corp |
| Associates | Asso |
| Association | Assn |
| International | Inter |
| Limited Liability Corporation | LLC |
| Limited Liability Partnership | LLP |
| Limited | LTD |
| Charter | Chtr |
| Service/Services (any variation) | Srv |
| Department | Dept |
| Management | Mgmt |
| Administration | Adm |
| Agency | Agy |

Government Abbreviations

When entering governmental agencies that have both state and federal designations, use the following standard:

| | |
|--------------------------------|--------------------------------|
| U.S. Department of Agriculture | Department of Agriculture – US |
| Kansas Department of Education | Department of Education – KS |

| | |
|--------------------------|----------------------|
| Address Standards | Section G |
|--------------------------|----------------------|

BANNER permits multiple addresses to be entered for a person or vendor. These addresses can be of different types and can be by effective date. WSU has 21 different address types. The use of each address type must be strictly defined so that conflicts do not arise among the various functional areas such as admissions, registration, financial aid, student billing, vendor and vendor billing. Users with permission to update address data can update all address data.

Address Types

The address types are in drop down menus within in Banner. **See STVATYP FOR types**

Basic Principles

United States postal standards will be used for all addresses.
U.S. postal standards are found at
<http://pe.usps.gov/cpim/ftp/pubs/Pub28/pub28.pdf>.

Runner Technologies software will analyze every address entered. If the address is a US address, Runner Technologies will return a standardized address meeting US Postal standards. If the address is not valid, the person or vendor must be contacted to make the correction.



Overriding Runner Technologies should be done only when there is official documentation of an error. This functionality will be available in the near future.

Address Data Entry

Each person who has authority to enter an address should attend a training session on entering addresses conducted by Banner User Services.

Addresses are entered in **SPAIDEN** (Student/FA modules), **PPAIDEN** (HR module), **FOAIDEN** (Finance module) or **APAIDEN** (Alumni).

Address Types and county, state and nation codes may be found in Appendix A.

Address Changes

Procedures for address change:

1. Human Resources will change addresses of all current employees
2. Registrar will change addresses for current students
3. Alumni will change addresses as information becomes available for all members including former students if the person is not currently enrolled or registered for a current or future semester or former employee.
4. Alumni will notify HR and the Registrar of the new address for current employees, students registered for current or future semesters when they become available. Alumni will not make changes in any records for current employees or students or pre-enrolled students.

When entering a new address, a valid telephone number must be entered or re-entered to assure sequence numbers address and telephone number match.

General Guidelines for Addresses

1. Do not use symbols in the first position of an address field.
 2. Hyphens and slashes may be used when needed for clarity or for designated fractions. Do not enter spaces between hyphens and slashes.
 3. Do not use commas, periods or apostrophes.
 4. Do not use the ampersand (&) in place of the word "and."
 5. Do not use the percent sign (%).
 6. Do not spell out "In Care Of," it should be entered as c/o in lower case.
 7. Do not use a pound sign (#) within an address because it causes a problem with the Banner printing function.
-

System Configuration

In Banner, there are three lines of 30 characters each into which the address information may be entered. The first address line is required. The information on the address lines should **NOT** include city, state or zip code. Banner provides separate fields for entering these data elements.



When making decisions about what data to enter on which line, keep in mind that the US Postal Service reads the address from the bottom up.

Specific Guidelines

Use Address type CA to identify a Campus Box.

Street Standards

All information is typed in upper/lower case.

Special Characters

The **period** (.) cannot be used when entering the number portion of an address. The following is an example: 39.2 Rd use 39-2 Rd

Ampersand – The symbol "&" rather than spelling out "and". Symbols such as "%" (in care of) should not be used.

Primary Address or Street Number and Name

The primary address should be entered on the 1st address line. 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. If the address is multi-unit apartment or building, place the room, suite, or apartment number to the right of the street address. If the secondary unit designator is provided with only a pound sign (#) along with the number (e.g., 3454 N. Jones #4), remove the (#) and replace it with the abbreviation for number (No.). **NEVER use the # sign.**

| PRIMARY ADDRESS EXAMPLES | |
|--------------------------|---------------------------|
| Enter | 102 Main St Apt 101 |
| Enter | 1356 Executive Dr Ste 202 |
| Enter | 1600 Central Pl Bldg 14 |
| Enter | 425 N Arbor St No 6 |
| Enter | 55 Sylvan Blvd Rm 18 |

It is preferred that the complete primary address be listed on the first address line. However, if there are not enough characters available on the first address line, Banner allows two additional lines of address information. These can be used for secondary unit designators and P.O. Box information.

Unit Designators

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

| UNIT DESIGNATOR ADDRESS EXAMPLE | |
|--|--------------------------------|
| Enter | Ste 202 102 Main St Apt 101 |

| Unit Designator | Data Standard Abbreviation |
|------------------------|-----------------------------------|
| Apartment | Apt |
| Building | Bldg |
| Department | Dept |
| Floor | Fl |
| Lot | Lot |
| Room | Rm |
| Suite | Ste |
| Unit | Unit |

Street and P.O. Box

If an address contains BOTH a street address and a post office box, they should be entered on two different lines. The US Post Office will deliver mail to the first address line listed above the city/state/zip line. Therefore, the post office box should be the last part of the address entered before the city/state/zip.

| STREET/P.O. BOX ADDRESS EXAMPLE | |
|--|----------------------------|
| Enter | 1379 W Pine PO Box 2351 |

Three Line Address

Enter data in sequential order starting with the first address line. Do not enter data into the second address line until data has been entered into the first address line, do not enter data into the third address line until data has been entered into the second.

| THREE LINE ADDRESS EXAMPLE | |
|-----------------------------------|--|
| Enter | c/o Marvin Martian Chanin and Levers Inc 1600 Martian Blvd Ste 910 |

Compass Directions

If appropriate, compass directional words should be abbreviated at the beginning and/or end of the street name. If the actual street name is a compass direction and also has a directional word, the directional word must be abbreviated to avoid confusion with the street name. See below for examples and an abbreviation table.

| COMPASS DIRECTION ADDRESS EXAMPLES | |
|---|-------------------|
| Enter | 102 Main St SW |
| Enter | 1624 N South Blvd |

| Compass Direction | Data Standard Abbreviation |
|-------------------|----------------------------|
| East | E |
| West | W |
| North | N |
| South | S |
| Northeast | NE |
| Northwest | NW |
| Southeast | SE |
| Southwest | SW |

Street Designators

Street designators should follow the standard US Post Office standards. Refer to the US Postal Service Address Standards publication for abbreviations of designators not listed below.

| Street | Data Standard Abbreviation |
|-----------|----------------------------|
| Avenue | Ave |
| Boulevard | Blvd |
| Branch | Br |
| Center | Ctr |
| Court | Ct |
| Circle | Cir |
| Drive | Dr |
| Estate | Est |
| Highway | Hwy |
| Lane | Ln |
| Parkway | Pkwy |
| Place | Pl |
| Road | Rd |
| Square | Sq |
| Station | Sta |
| Street | St |
| Terrace | Ter |
| Trail | Trl |
| Way | Way |

County

Banner is configured to automatically enter the county name when a zip code is entered. This is the preferred method of entering the county name. The county code is a 5 character code consisting of the 2-character state code plus the 3-digit FIPS (Federal Information Processing Standards) county code. If no county defaults when entering the zip, enter the county code from the list of values in the validation table.

Zip Codes

| | |
|----------------------------------|---|
| | Zip codes MUST be entered for all United States and Canadian addresses. |
| United States | Enter the 5- digit zip code. When the 9-digit zip code is available, place a hyphen between the first 5 and last 4 digits. If the zip code is entered, the system will automatically populate the city and state data fields. |
| Canadian | Enter the six character zip code without hyphens or spaces. |
| International Postal Code | Enter the international address as supplied to you by the student. Normally, the Postal Code would be entered on the same line as the city. |

Nation

A nation code is required for all non-US addresses. Banner maintains a list of all the current code options available. DO NOT enter a nation code for US addresses. Banner is configured to automatically enter the nation name when a nation code is entered. In Banner, the default nation designation is "US." For non-US addresses, select the appropriate nation code from the validation table.

Military Address – Overseas

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. Once the zip code is entered, the APO or FPO code will default into the City field and the military ‘State’ code (AA, AE or AP) will default into the State field. Use AA for mail in the Americas other than Canada (340), AE for mail going to Europe, the Middle East, Africa and Canada (090 through 098), and AP for mail destined to the Pacific (962 through 966).

| MILITARY OVERSEAS ADDRESS EXAMPLES | |
|------------------------------------|--|
| Enter | SSGT Mario Martian Unit 2050 Box 4190 APO AP 96522-1215 |
| Enter | Sgt Cher Downey PSC 802 Box 2625 APO AE 09777-0010 |
| Enter | Seaman Duane Reeves B Division USS North Dakota FPO AA 34093-2344 |

Military Address – Domestic

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

| MILITARY DOMESTIC ADDRESS EXAMPLES | |
|------------------------------------|--|
| Enter | Col Margaret Henry Lowery Air Force Base 8205 E Sixth Ave 405 Denver CO 80234 |
| Enter | Capt Jack Harris 2314 Barracks St Minot AFB ND 58705 |

International Addresses

Section

H

Enter an international address exactly as provided, including punctuation. The Province/State Field in Banner is for US and Canadian addresses only. The goal with any international address is to enter all parts of the address into Banner AND in the correct order to print on a mailing label – regardless of how long the address may be.

- Try to avoid commas as much as possible.
 - Do not abbreviate words that are spelled out.
 - With the exception of Canadian addresses, address line 3 should contain the full name of the province or state for a foreign address, if applicable.
 - Canadian addresses should use the state/province code field for the province code.
 - Use the Nation Validation values to enter nation or country codes.
 - If available, the postal code should be entered in the ZIP/postal code field.
-

Address Examples

In many cases, you will have to enter city and international province data in the City Field. However, there are times when you will not be able to get the city and international province in only the City Field, which is limited to 20 characters. The Postal Code field may be used for international postal codes. Examples are as follows:

A) Put the city in the CITY FIELD by itself when there is no province to worry about.

| | |
|--------------|---|
| STR 1: | P.O. Box 819 |
| STR 2: | |
| STR 3: | |
| CITY: | Conakry |
| STATE/PROV: | <i>[U.S. and Canadian addresses only]</i> |
| POSTAL CODE: | |
| NATION: | Guinea |

B) Put the city AND province in the CITY FIELD when the city and province can fit comfortably.

| | |
|--------------|---|
| STR 1: | |
| STR 2: | |
| STR 3: | |
| CITY: | |
| STATE/PROV: | <i>[U.S. and Canadian addresses only]</i> |
| POSTAL CODE: | |
| NATION: | |

C) If the city and province are too long to fit in only the CITY FIELD, use STR 3 and CITY to enter the city and province data:

| | |
|--------------|---|
| STR 1: | 18, Persiaran Kolej BBN |
| STR 2: | |
| STR 3: | Bandar Baru Nilai (City Name) |
| CITY: | Negeri Sembilan (State Name) |
| STATE/PROV: | <i>[U.S. and Canadian addresses only]</i> |
| POSTAL CODE: | 71800 |
| NATION: | Malaysia |

| | |
|--------------------------------|----------------------------|
| Miscellaneous Standards | Section I |
|--------------------------------|----------------------------|

Telephone Numbers

Telephone Types *The telephone type simply describes the type of telephone number entered.*

The following assumptions/rules apply for the use of telephone types:

- Only one telephone number can be designated as the primary telephone for its associated address. The primary number is the only one that can be updated via the web. However multiple telephone numbers can be associated with a single address type.
- Telephone records can exist that are not associated with any address. When the University allows updating of phone numbers via the web, it should be noted that only primary telephone numbers that are associated with an address can be updated online.

Telephone types are maintained on **STVTELE** (all modules).

Area Code The three-digit area code must be entered for all phone numbers.

Phone Number Enter the seven-digit phone number without the hyphen between the third and fourth digits. Example: 6746773 or 6768609.

Extension If an extension number is provided, enter only the digits of the extension. Do not enter EXT or X into the extension field. Example: 7300.

International Telephone Numbers International telephone numbers including the country code, city code and local number (13-15 digits) are entered into the field entitled **International Access**. The telephone field is used only for US and Canadian telephone numbers.

Email Address: Type and Preferred Indicator

E-mails are entered in GOAEMAL (all modules).

For anyone who is a current student, the preferred email address will be the WSU's e-mail address.* UCATS updates the preferred email indicator every Friday. If a person is not a current student or employee, the Alumni Association sets the preferred indicator.

Reminder: Everyone except the Alumni Association who is extracting the email addresses should use the relevant email type and not the preferred indicator.

*At this writing, Self Service interface uses the preferred e-mail indicator; thus it must be set for current students.

Social Security Number Standards



To make changes to a person's Social Security number, the procedures outlined in the section "Data Change Policy" are followed. Social Security numbers are entered in **SPAPERS** (Student/FA modules), **PPAIDEN** (HR module) or **FOAPERS** (Finance module).

A Social Security number must be entered for all employees of any type, students receiving financial aid, and vendors. Enter the nine-digit number, omitting the hyphens. FEIN number has 11 digits.

If the information is unavailable, leave blank. **Do NOT** enter 000000000 or 999999999 or any other type of "holder" number.

The Social Security number is not to be confused with or used as an individual's Banner ID. A generated ID must be assigned by the system in the "ID" field while only the Social Security number is entered in the SSN field.

Calendar Dates

Date field appears on forms throughout the Banner system. Banner is set up to accept dates in the format MMDDYYYY (2 characters Month, 2 characters Day, and 4 characters Year). Banner will display the date as DD-MMM-YY regardless of entry. **The four digit year must be entered.**

Specific Guidelines

1. Banner determines which parts of the date entered are the month, day, and year, and automatically converts and stores the date in the format DD-MON-CCYY.
2. Year numbers 00 through 49 are converted to 2000 to 2049; Year numbers 50 through 99 are converted to 1950 to 1999. The century default can be overridden by typing the 4-digit century and year.

Important Considerations

1. Always enter four digits for the year.
2. Always enter two digits for the month and day.
3. You can enter the data with dashes or slashes or without separators.
4. If you enter a "t" in the date field and press <enter>, today's date will default in the field.
5. Enter birth dates in the same format as general dates.

| DATE EXAMPLE: March 5, 2004 | |
|------------------------------------|-------------|
| Enter | 03052004 |
| Enter | 03/05/2004 |
| Enter | 03-05-2004 |
| It Will Store As | 05-MAR-2004 |

Biographical Information

Deceased Information

Appropriate documentation includes newspaper obituary, death certificate, certain official Web sites such as the Social Security Administration's Death Master File (<http://www.ntis.gov/products/pages/ssa-death-master.asp>). If the person is a current employee (see employee verification table in Mytools) or current student (See SWIGSTU), the name and id should be sent the appropriate office i.e. HR or Registrar. Information for other than employees and students may be entered by the office that learns about the death. When a person is deceased, the information is indicated on SPAPERS (Student module), PPAIDEN (HR module), FOAPERS (Finance module), or APAIDEN (Alumni).

Gender Standards

The gender code is entered in the General Person Table SPADERS as male (M), female (F) or not available (N). **THIS FIELD MAY NOT BE LEFT BLANK.**



'N' is not an allowed entry in BANNER for an employee. The use of 'N' must be minimized in student records and additional research to determine the gender code if at all possible.

Date of Birth

The Date of Birth (DOB) is required for all employees and students, not for vendors, prospective students or Alumni

Citizen Type

Citizen type is required for all students and employees except vendors, prospective students and alumni. . A person's citizenship is entered on the General Person form SPAPERS. Valid values are found in the validation table STVCITZ and drop down menus.

Ethnicity

Ethnicity codes are requested from all students and employees. The field is located in SPADERS and the codes are in drop down menus and on the validation table PTVEEOC.

Religion

The religion field is not used at WSU.
