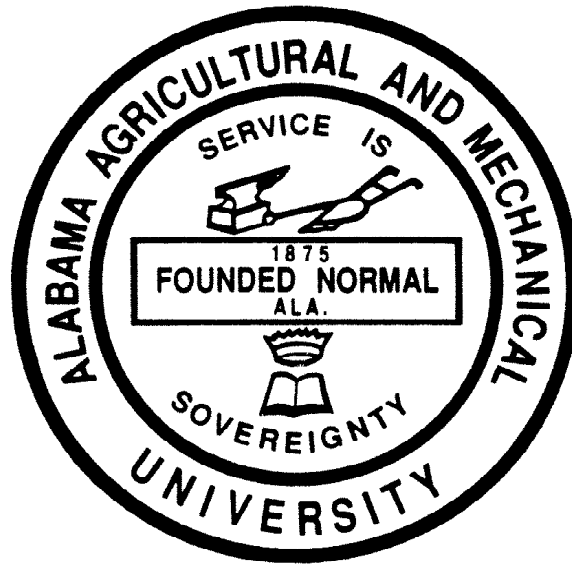


Alabama A&M University

Normal, Alabama 35762



BANNER DATA STANDARDS MANUAL

Version 1.0.1

Originally Published: January 31, 2008

Revised: September 14, 2010

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 Alabama A&M University.

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Banner Data Standards Manual

Revision History

1.0.0	Originally Published	January 31, 2008
1.0.1	Draft indicator removed	September 14, 2010

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DATA STANDARDS MANUAL PREFACE

Alabama A&M University has made the very important decision to implement SunGard Higher Education Banner ERP System. The major administrative modules comprising the system are: Advancement, Financial Aid, Finance, Human Resources/Payroll and Student (Admissions, Accounts Receivable, Housing and Registrar). Additionally, the following ancillary system implementations are included: Self Service Functionality, Data Migration, E-Learning, Luminis Premier, Operational Data Store/Enterprise Data Warehouse, Workflow and E-Print. This implementation will have a major impact on all areas of the University.

The primary purpose of the Banner implementation is to fulfill the University's need for a fully integrated suite of web based administrative applications that will allow university departments and functional areas to share information. This in turn will allow for better customer service for faculty, staff, students, alumni and other stakeholders. Because the Banner system database structure shares common tables, when information is entered into one module of any functional area, it is available instantly to all module users. The ability to instantly share information across functional areas creates the additional demand to be able to ensure that these shared data items are input in an accurate and timely manner.

The "Data Standards Committee" was formed to collaboratively develop this Data Standards Manual (Manual) to "ensure accuracy and completeness of the data that is shared among the various Banner systems." The data that this standards policy governs is referenced in the Banner system as "General Person Data." Ownership of general person data will be shared across all areas. Additionally, these guidelines establish measures for the proper access and use of data. Areas will have individual guidelines unique to their particular requirements that will supplement, but not contradict, the standards put forth in this document.

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 create your identity 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 creating a new record for any entity (“Person” or “Non-Person”), verify that the entity has not already been entered in the Banner database. **Each user must conduct a thorough search to prevent entering a duplicate and/or multiple records.** Duplicate and/or multiple records create problems in many parts of the system and may take many hours of staff time to locate and remove.
- **NEVER USE:** In **creating** a record, **never use** the pound sign (#) or the percent sign (%). The pound sign can cause Banner database errors and the percent sign has a special use within the search functions of the system.
- **ABBREVIATIONS:** There are specific ways to abbreviate words that are shown in this document and in Appendix C. Use only these approved forms when entering data.
- **PUNCTUATION: Do not add punctuation where there is none.** For “Person” names, use hyphens, apostrophes or dashes exactly as the person indicates in writing. Do not use commas or periods in any name field. Do not use punctuation in abbreviations, prefixes or suffixes such as Dr, PhD or Jr. Punctuation for address fields should only be used if specifically required for the address number and should be limited to periods, slashes and hyphens.
- **DATA CHANGES: 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 **must** 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*) 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 &.
6. Use the word Unit, Ste, Apt, etc. in place of #, No, or Number.
7. Enter c/o in place of in care of in Street Line 1.
8. Enter attention line in Street Line 1 (Attn Bob Snow).
9. Enter periods, slashes, and hyphens only in street number and zip code (39.2 Rd, 101 ½ Main St, 97203-4798).
10. Use numbers for numbered streets and include st, nd, rd, th (201 4th St, 1919 23rd Ave, 4801 NW 101st St).
11. Abbreviate street suffixes, unit designators, and directionals, if not part of primary name (N South Oak).
12. If there are two street suffixes, abbreviate second; first becomes part of street name (1300 W 43rd Avenue Ct).
13. Enter unit designators after street address or on line above.
14. Spell out street and city names, if space allows (County Road 14, Fort Collins, Idaho Springs).
15. Allow Banner to enter City and State from Zip Code.

Telephone Numbers

1. Enter telephone numbers if provided. Do not use any punctuation (such as hyphens).
2. 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), and the third field is reserved for the extension number.
3. Only numeric values should be entered in any of the three fields, NO ALPHA CHARACTERS.
4. All regional and local telephone numbers, including On Campus telephone types, are entered using the ten-digit format.
5. Set the Primary indicator if the telephone number is the primary contact for the entity.
6. Set the Unlisted indicator if the telephone number should be designated as 'unlisted'
7. Set the Inactive indicator if the telephone number is no longer valid.

Address Abbreviations

Street Suffixes

Avenue	Ave
Boulevard	Blvd
Center	Ctr
Circle	Cir
Country Rd	CR
Court	Ct
Drive	Dr
Expressway	Expy
Freeway	Fwy
Highway	Hwy
Lane	Ln
Parkway	Pkwy
Place	Pl
Point	Pt
Road	Rd
Route	Rt
Rural Route	RR
Square	Sq
Street	St
Trail	Trl
Turnpike	Tpke
Way	Way

Unit Designators

Apartment	Apt
Building	Bldg
Department	Dept
Floor	Fl
Number	Unit
Room	Rm
Suite	Ste
Unit	Unit

Compass Directionals

North	N
South	S
East	E
West	W
Northeast	NE
Northwest	NW
Southeast	SE
Southwest	SW

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. For Canadian addresses, enter Province in State or Province Code.
5. The County Code field should be left blank.
6. Enter postal code (with spaces) in Postal Code.
7. Enter country name from validation table in Nation Code.

Telephone Types

Business	BU
Campus	CAMP
Cell Phone	CELL
Emergency	EMER
Fax	FAX
Home	HOME
Permanent	PR
Pager	PGR
Third Party	TP
Toll Free	TFL
Directory	DIR

Word Abbreviations

Academic	Acad	International	Intl
Associates	Assoc	Management	Mgt
Association	Assn	National	Natl
Council	Cncl	Program	Prgm
Division	Div	Student	Stdnt
Education	Educ	United States	US
Foundation	Fndtn	University	Univ

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

Before creating a “Non-Person” Vendor...

Search on GUIALTI or GOAMTCH using ID, TIN, Name, and with % before and after each search string

“Non-Person” Names – Corporations, Partnerships, LLC’s, etc.

1. Enter full name as provided using upper and lower case (Association of Art Educators).
2. Spell out all words except suffix (Corp, Inc, Co, Ltd), if space allows, (Smith Designs Inc.) unless suffix is part of the primary name (The Hair Company).
3. Use USPS standard business word abbreviations if name is longer than space allows.
4. Include articles such as a, an, or the, if space allows (The Greeley Tribune).
5. Except for .com names, do not enter punctuation (periods, commas, apostrophes) or special characters. (&, %, #, @) (Ricks Furniture, A and M Glass).
6. Enter a space in place of hyphens, dashes, and slashes (Econo Rate Rent A Car).
7. Omit punctuation and spaces between initials (ABC Corp, WW Grainger Inc).
8. Enter acronyms without spaces or periods as Alternate Name on FOAIDEN (UPS, NCMC, PERA).

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 the Banner information system;
- Ensuring that the interpretation of information is accurate and consistent within the University; and
- Outlining the responsibilities of users of the information maintained in the database.

ADMINISTRATIVE RESPONSIBILITY

By law, certain data is confidential and the University cannot release it without proper authorization. Users of the data **MUST** adhere to any applicable federal and state laws as well as University policies and procedures related to data protection and confidentiality. Data is a vital asset owned by the University. All institutional data, whether maintained in the central database or copied into other data systems (e.g., personal computers), remains the property of the University. Access to data is provided to support a user's official University responsibility only. 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. Users are responsible for all transactions occurring during the use of his/her Log-in User ID and Password.

“Query” access enables the user to view and 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.

AAMU 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; and
- Maintaining the security, confidentiality, integrity and accuracy of the data accessed.

1. Data Administration

1.A. Purpose

This Manual provides data standards requirements for the protection, access, maintenance, and use of University data that is electronically maintained on the Banner system. This Manual defines the responsibilities of users who input and access that data.

Divisions/departments may have individual requirements that supplement, but do not replace or supersede the requirements outlined in this Manual.

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

1.B. Data Confidentiality

1.B.1. General

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

FERPA: The Office of the Registrar administers FERPA for the University.

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).

SEVIS: The Office of Admissions (undergraduate) and the Office of Graduates Studies (graduate) 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.

SSN: Social Security Number (SSN) usage is limited to campus organizations that require this information when reporting to external government agencies. Written justification must be supplied.

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

1.B.2. Student Directory Information

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

Name	Address	Telephone number
E-mail address	Birth date	Classification
Dates of attendance	Enrollment status	Major field of study
Degree(s) pursued or being pursued		
Degree(s) conferred and conferred date(s)		

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

1.B.3. Confidentiality Indicator – Students only

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

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

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

1.B.4. Releasing Confidential Information

Releasing **any** information (including directory information) about a student who has signed a “Request for Non-Release of Directory Information” form should never occur. The Office of the Registrar handles all requests for student information, and any such request should be forwarded to the Registrar.

1.C. Data Stewards

1.C.1. General

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; and
- 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 University 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 AAMU Stewards

<u>Area of Responsibility</u>	<u>Data Steward</u>
Employees, including student employees	Director of Human Resources
Employment applicants, other student employees	Director of Human Resources than
Students, including student employees	Registrar
Student applicants/prospects (undergraduate)	Director of Admissions
Student applicants/prospects (graduate)	Graduate Studies
Vendors	Comptroller
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 log-in and passwords with anyone.

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

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

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

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

"Banner Security Access Request" forms, along with related instructions, can be accessed through <http://www.aamu.edu> or by contacting the Technical Support Center at 372-5953. An employee's signature on a "Banner Security Access Request" form signifies agreement to abide by all University data standards, University policy and procedures and state and federal laws, as well as an understanding of the implications due to improper use.

Banner access is established based on particular job functions. "Query" access enables the user to view, analyze, but not change, University data. If data is

downloaded to a personal computer or other device, the downloaded data must be responsibly used and accurately represented. “Maintenance” access provides both query and update capabilities. Maintenance access is generally limited to users directly responsible for the collection and maintenance of the data. Specific Banner security classes will be assigned to each employee as appropriate. For example, a registration clerk could have maintenance access to registration process, but only query access to academic history information. Each user requesting access will contact the respective Data Steward to determine the appropriate Banner classes for assignment. The user is then required to obtain written authorization from both his/her direct supervisor and the responsible Data Steward before access will be granted.

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

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

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

1.D.2.a. Misplaced or Compromised Logon ID(s) and Passwords

Any user who has lost or forgotten an assigned Logon ID must notify his/her supervisor as quickly as feasible. The supervisor will notify the Data Steward and ITS promptly.

1.D.3. Banner User Names

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

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

FIRST NAME_LAST NAME

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

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

1. Human Resources initiates an "Employee Termination" form that includes documentation for inactivating an employee's user name.
2. Payroll removes the terminating employee's payroll org and employee class security access from PSAORGN, PTRUSER, and GOAEACC. This security access termination is documented on the "Employee Termination" form.
3. Payroll forwards the "Employee Termination" form to Finance.
4. Finance removes the terminating employee's finance fund and org security access from FOMPROF, FOMUSFN, FOMUSOR, and FTMMGR.
5. Finance forwards the "Employee Termination" form to Information Technology Services (ITS).
6. ITS inactivates (and if necessary – terminates) the terminating employee's user name.
7. ITS documents that the employee's user name has been inactivated or terminated on the "Employee Termination" form and return the form to Payroll.

1.D.3.c Banner User Name Changes

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

1. Both non-student employees and student employees must:
 - a. Complete an "Individual Change Request" form (See Appendix A.1).
 - b. Complete a "Banner USER_NAME Change" form (See Appendix A.5).
 - c. Provide proper original documentation as described 2.D.2 below.

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

- d. Reassigns the identical BANSECR CLASS security access to the employee's new user name.
 - e. Inactivates the employee's previous user name.
 - f. The ITS employee who completes this process then signs and dates the faxed copy of "Banner USER_NAME Change" form.
 - g. The copy of the "Banner USER_NAME Change" form plus the copy of the "Individual Change Request" form is faxed to the Finance Office.
 - h. The copy of the "Banner USER_NAME Change" form plus the copy of the "Individual Change Request" form is then securely filed within the ITS files.
5. The Finance Office then:
- a. Removes the employee's finance fund and org security access that was assigned under the previous Banner user name using Banner forms: FOMUSOR, FOMUSFN, FTMFMGR, and FOMPROF.
 - b. Reinstates the employee's finance fund and org security access that was assigned under the previous Banner user name to the new Banner user name using Banner forms: FOMUSOR, FOMUSFN, FTMFMGR and FOMPROF.
 - c. The Finance employee who completes this process then signs and dates the original "Banner USER_NAME Change" form.
 - d. The copy of the "Banner USER_NAME Change" form plus the copy of the "Individual Change Request" form is then faxed to the Payroll Office.
 - e. The copy of the "Banner USER_NAME Change" form plus the copy of the "Individual Change Request" form is then securely filed within the Finance Office's files.
6. The Payroll Office then:
- a. Removes the employee's payroll org security access that was assigned under the previous Banner user name using Banner forms: PSAORGN, PTRUSER and GOAEACC.
 - b. Reinstates the employee's payroll org security access that was assigned under the previous Banner user name to the new Banner user name using Banner forms: PSAORGN, PTRUSER and GOAEACC.
 - c. The Payroll employee who completes this process signs and dates the original "Banner USER_NAME Change" form.
 - d. The copy of the "Banner USER_NAME Change" form plus the copy of the "Individual Change Request" form is then

forwarded to the Human Resources office and securely filed with the original documents.

2. Data Input – Original Entry and Modifications

2.A. Modifications to Data Standards

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

2.B. Modifications to Validation Tables

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

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

Banner System student, employee and vendor “identifying information” includes AAMUID Number, legal name, marital status, social security number (SSN) and/or taxpayer identification number (TIN). In the Banner System, a “Person” is an individual who uses a SSN for taxpayer identification purposes. “Person” related student, employee and/or vendor identifying information is entered into the Banner System using the Banner form SPAIDEN, PPAIDEN, or FOAIDEN.

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

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

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

- Original student information from self-reported information provided by the student through the process. Students are required to provide an SSN if they

are applying for financial aid and/ or the College Opportunity fund (COF). This information is “Person” information.

- Original employee information from self-reported I-9 and W-4 information provided by the employee through the employment application and hiring process. This information is “Person” information.
- Original vendor information from W-9 information provided by the vendor through the purchasing process. This information is “Person” information for vendors who use a SSN for tax purposes. This information is “Non-Person” information for vendors using a TIN for tax purposes (corporations, partnerships, LLC’s, etc).

An invalid SSN/TIN should never be entered intentionally into the SSN/TIN field.

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

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

AAMUID Numbers, SSN’s, TIN’s, marital status, birthdates, etc., can be changed by authorized functional Banner users. Changes made by functional users to either an AAMUID Number or to a Name are noted with Banner functional user attempts to use either an AAMUID Number or a Name that has been changed, Banner will automatically retrieve the information using the updated or correct AAMUID Number and/or Name.

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

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

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

If a “Person” has other roles identified in GUASYST (registration, employee, vendor, financial aid applicant), valid documentation (see 2.D.2 and 2.D.3 below) is required to make changes to the “Person” legal name, marital status,

and/or SSN. The appropriate “Individual Change Request form” and/or “Social Security Number Change Request Form” (Appendix A.1 and A.2) must also be completed and submitted to the proper office as noted in 2.E. below.

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

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

Documents supplied may be originals, copies or faxed copies only. Acceptable documentation for student or employee’s SSN changes is the person’s:

- Social Security Card.

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

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

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

- Marriage License
- Court Document

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

A “Person” vendor is an individual using an SSN for identification purposes. “Person” vendors include sole proprietorships, independent contractors, employees and students receiving expense reimbursement checks, etc. A revised W-9 form is acceptable documentation for a change to legal name, SSN and/or marital status for a “Person” vendor **who is not currently and has not previously been a student and/or employee at the University.** Accounts payable and/or purchasing personnel must check Banner GUASYST (and the Legacy System) to determine if a “Person” vendor is currently or has

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

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

A “Non-Person” vendor is a corporation, partnership, and/or LLC that uses a TIN for identification purposes. A revised W-9 form is acceptable documentation for a change to legal name and/or TIN for a “Non-Person” Vendor.

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

Identifying information changes can affect more than one Banner module; therefore, the appropriate Data Steward must be determined before making such changes to Banner records. The appropriate Data Steward can be determined using the Banner form GUASYST. When presented with a completed “Individual Change Request” form or a “Non-Person Vendor Change Request” form, authorized Banner users will enter the student, employee or vendor AAMUID number into GUASYST. The current name of the student, employee or vendor will be retrieved by the Banner System. The Banner user will then go to the next block of GUASYST and Banner will identify the various roles the “Person” or “Non-Person” may have, including: admissions, general student, financial aid applicant, and/or vendor. As identified by GUASYST, the student, employee or vendor should be directed to submit a completed “Individual Change Request Form” and original, required documentation to the appropriate Data Steward as identified below:

- **Undergraduate students before enrollment:** Undergraduate students who have been admitted but have not yet registered will have only an admissions role in GUASYST. **Changes for these students should be made by the Admissions Office and do not require separate documentation.** If the student has any other role noted in GUASYST, the change should be made in the Registrar’s Office and **appropriate documentation is required.**
- **Graduate students before enrollment:** Graduate students who have been admitted but have not yet registered will have only an admissions role on GUASYST. **Changes for these students should be made by the Graduate Studies Office and do not require separate documentation.** If the student has any other role noted in GUASYST, the change should be made in the Registrar’s Office and **appropriate documentation is required.**
- **International Students before enrollment:** International students who have been admitted but have not yet registered will have only an Admissions role on GUASYST. **Changes for these students should be made by the Graduate School Office or the Admissions Office and do not require**

separate documentation. If the student has any other role noted in GUASYST, the change should be made in the Registrar's Office and **appropriate documentation is required.**

- **All students and student employees after enrollment:** Students who have enrolled in the University will have an admissions and a student role in GUASYST. These students could also have an employee and/or vendor role in GUASYST. The student role, however, takes precedence and **changes for these students are made by the Registrar's Office. Appropriate documentation is required.**
- **Non-student employees:** Non-student employees will have an employee role in GUASYST. These individuals may also have a vendor role in GUASYST. The employee role, however, takes precedence and **changes for these individuals are made by the Human Resources Office. Appropriate documentation is required.**
- **"Person" vendors who have previously been and/or currently are a student and/or employee of the University:** These individuals will have multiple roles such as admissions, general student, financial aid applicant and/or employee in GUASYST that are in addition to their Banner vendor role. **Information changes for these individuals should be made by the Registrar's Office or the Human Resources Office. Appropriate documentation is required.**
- **"Person" vendors who have never been a student and/or employee of the University:** These individuals will only have a vendor role in GUASYST. **Changes for these individuals are made by the Purchasing Office. A valid revised W-9 form is required for documentation.**
- **"Non-Person" vendors:** "Non-Person" vendors will only have a vendor role in GUASYST. It is not possible for a "Non-Person" to be a student or an employee. **Changes for these entities are made by Purchasing Office. A valid revised W-9 form is required for documentation.**
- **Students and employees with multiple roles:** Individuals may have multiple roles in GUASYST (general student, financial aid applicant, employee and/or vendor). The person's student and/or employee role takes precedence over the vendor role. **Changes for these individuals can be made by either the Registrar or Human Resources Office. Appropriate documentation is required.**

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

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

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

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

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

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

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

3. Common Matching and Ensuring Unique Banner Records

3.A. Common Matching

For data accuracy and consistency it is very important to prevent the creation of duplicate records and/or multiple PIDMs. To achieve this goal, 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 duplicate and/or multiple records are not created. This search is to be conducted using the Banner form GOAMTCH. Common matching is set up to search on the following criteria for each method of data input:

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

If a Social Security Number (SSN) or Taxpayer Identification Number (TIN) is provided by a student, employee or vendor, it should always be used during the

common matching process to make sure that no other persons have been created in the Banner system previously using the same SSN. If a match does not exist, the information entered into the GOAMTCH form will be entered as appropriate into the SPAIDEN (Student information form), PPAIDEN (HR Personal information form) and/or FOAIDEN (Vendor Information form) automatically by the Banner System.

3.B. Validation Tables

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

3.C. Multiple PIDM

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

Each unique PIDM is directly tied to an AAMUID Number. Occasionally in error, multiple AAMUID Numbers are created for a single “Person” or “Non-Person” in the Banner System. When this occurs, information related to a single “Person” or “Non-Person” can be entered into multiple AAMUID Numbers and correspondingly also into multiple Banner PIDM numbers. When a multiple PIDM is created, the Banner System cannot accurately record and store data using a single PIDM and/or Banner Identification Number. Duplicated and/or multiple information records can then be recorded in any of the multiple PIDMs and cannot be accurately stored or retrieved by the Banner System.

3.C.1. Causes of Multiple PIDMs

Duplicated and/or multiple records appearing more than once under different PIDMs can occur in a variety of ways. The following activities can result in the creation of a multiple PIDM:

- Errors made by Banner users when keying in “Person” information into the Banner System. See Section 2f or search instructions to complete before a new “Person” 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 SAT/ACT tapes for student, etc.

3.C.2. Multiple PIDM “Clean-Up” Team

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

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

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

3.C.3. Multiple PIDM Reporting Tools

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

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

- The Banner Activity date for the most recently created PIDM.
- The identical SSN shared by both AAMUID Numbers and both PIDMs.
- The user ID for the employees that created each PIDM.
- The AAMUID Number for each PIDM.
- Each PIDM number.

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

- The incorrect last name with DO NOT USE added to it.
- Incorrect PIDM number.

- AAMUID Number tied to the incorrect PIDM.
- First and middle name tied to the incorrect PIDM.
- Activity date and name of user adding DO NOT USE to incorrect name.
- Original creation date and user who created the incorrect PIDM.
- SPAIDEN, FOAIDEN, or PPAIDEN form used to add DO NOT USE to name.

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

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

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

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

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

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

1. The words “DO NOT USE” should be entered at the end of the last name in the last name field for the PIDM that should no longer be used. This change should be made to SPAIDEN, PPAIDEN or FOAIDEN as appropriate. This alerts users not to use the record until it is purged from the system. The name of the employee completing this step and the date of completion should be documented on the “Multiple PIDM Correction Form.” A copy of this form can be found in Appendix A.6.
2. Use Multiple PIDM Hold Code 90 in SOAHOLD to put a “Hold” on the incorrect PIDM. This prevents further transactions from occurring against the incorrect PIDM record. The name of the employee completing this step and the date of completion should also be documented on the “Multiple PIDM Correction Form.”

3. If determined to be necessary, the affected student, employee and/or vendor will be contacted by the appropriated data steward and informed of the correct AAMUID Number to be utilized by the student, employee and/or vendor.
4. All information that can be manually removed from an incorrect PIDM using standard Banner Processes should be removed by Banner Functional Area employees. If appropriate, this information should be manually reentered into the correct PIDM. The name of the employee(s) completing this step and the dates of completion should also be documented on the “Multiple PIDM Correction Form.”
5. After the data base administrators have removed as much information as possible from the incorrect PIDM using standard Banner processes, it may be possible to purge any remaining information (such as “name”) assigned to the incorrect PIDM and then purge the PIDM.
 - It is generally only possible to purge incorrect PIDMs if they have only a single role in the Banner system according to GUASYST.
 - The incorrect PIDM may only be purged from the Banner System by an authorized Information Technology Data Base administrator with the approval of each data steward as documented on the “Multiple PIDM Correction Form.”
6. Some information cannot be manually removed from an incorrect PIDM to the correct PIDM using standard Banner processes. An example of such information would be Accounts Payable Vendor check payment history information. Check payment history cannot be altered by accounts payable or purchasing employees after it has been processed.
 - PIDMs with multiple roles in GUASYST and payment or transcript history cannot be purged from the Banner system.
 - Some information will remain in the incorrect PIDM but new information will not be processed into the incorrect PIDM. These incorrect PIDMS will be adequately contained by these procedures.

4. Identification

4.A. Current Identification

4.A.1. General

The University considers the current name in Banner as a person’s legal name. A person’s legal name appears on official documents such as a birth certificate, court order, social security card, marriage license, driver’s license, passport, and/or citizenship papers.

The offices of Admissions, Graduate School, Registrar, and Human Resources consider the name originally reported on a “Student Application for Admission” to the University as the legal name.

Names for “Persons” and “Non-Persons” should have a customer friendly appearance. The objective is to enter names and addresses with both upper- and lower-case letters so that when a name is printed on correspondence, it looks contemporary and professional. Name formats have also been developed to meet United States Postal regulations.

It is recommended that offices that collect “Person” names on applications, or any other types of forms, designate separate fields on the form for the “Person” name to indicate first name, middle name, last name, and preferred first name (not required). This will facilitate correct entry into the respective fields in Banner.

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

4.A.2. “Person” and “Non-Person” AAMUID Numbers

4.A.2.a. “Person” ID

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

4.A.2.b. “Non-Person” ID

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

4.A.2.c. Changes to AAMUID Numbers

It is vitally important to maintain the unique integrity of each PIDM and its relationship to an AAMUID number. An AAMUID Number, therefore, is only cancelled when duplicate and/or multiple numbers are assigned to a single entity or Banner PIDM. Only in the rarest of circumstances will a student or employee be manually assigned a different AAMUID Number other than the one automatically assigned by the Banner System. Requests for

such changes may be made by students through the Registrar's Office and by employees through the Human Resources office.

4.A.3. Name Types

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

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

4.A.4. "Person" Names

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

The last, first, and middle names should be entered exactly as the person has indicated. If given the full middle name, enter the full middle name. DO NOT change a full name to an initial. Always use normal upper- and lower-case letters for names. DO NOT enter leading spaces in any fields.

4.A.4.b. Name Case

If a person has written all upper-case letters, convert the name to normal upper- and lower-case letters. If the person's name starts with a lower-case letter, enter the first letter in lower case.

Example: duBois

For externally obtained data feeds, names will be converted into an upper- and lower-case format based upon these rules.

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

Do not use periods after initials or abbreviations.

Pamela A. Humphrey
Enter as: **First Name**= Pamela / **Middle Name**= A/ **Last Name**= Humphrey

Leslie M.F. Donner

Enter as: **First Name**= Leslie / **Middle Name**= MF/ **Last Name**= Donner

James St. Martin

Enter as: **First Name**= James / **Middle Name**= blank/ **Last Name** = St Martin

D. Gary Smith

Enter as: **First Name**= D Gary / **Middle Name**= blank/ **Last Name**= Smith

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

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

4.A.4.d. Multiple-Names

In cases where a single character is designated as the first name followed by a full middle name, place the single character and the middle name in the first name field.

W Mark Jones

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

If it is later learned that the “W” stands for William, the name should be changed in Banner to:

First Name= William / **Middle Name**= Mark / **Last Name**= Jones

If a person has more than two given names, and has not specified which are considered first vs. middle name(s), enter the first two names into the first name field and any other names into the middle name field.

Anne Marie Susan Smith

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

Billy Joe Daryl Thomas Miller

Enter as: **First Name**= Billy Joe / **Middle Name**= Daryl Thomas / **Last Name**= Miller

Upon request, it is acceptable to enter two names in the first name field.

Anne Marie Smith

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

4.A.4.e. Multipart-Names

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

Van Buren

Van der Vaart

Vander Vaart

4.A.4.f. Long Names

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

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

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

4.A.4.h. Punctuation

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

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

4.A.4.i. Prefixes and Suffixes

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

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

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

DO NOT include any punctuation with a prefix or suffix.

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

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

See Appendix C.1 for a list of Prefix abbreviations.
See Appendix C.2 for a list of Suffix abbreviations.

4.A.4.j. Preferred First Name

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

Example:
Current Name: William Knight
Preferred First Name: Bill
Current Name: D Mark Williams
Preferred First Name: Mark

4.A.4.k. Full Legal Name

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

4.A.5. “Non-Person” Names

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

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

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

Example:

ABC Trucking Corp	First National Bank Inc
US Department of Defense	The Earle
University of Portland	Karens Kitchen

4.B.1. General

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

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

Example:

Name:	Lee Livingstone
Previous Name:	Lee Stanley

Enter previous name (Lee Stanley) and save.

Enter current name (Lee Livingstone) and save.

Previous name will appear in the alternate identification block.

4.B.2. Name Type

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

4.B.3. Change Type

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

4.C. Validation Tables

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

FTVVITYP – Vendor Type Codes (Required).

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

4.D. Summary

- Use the Banner form GOAMTCH to search for existing records and prevent duplicate and/or multiple records.
- Banner will automatically generate an AAMUID Number for all entities.
- Use standard upper- and lower-case letters for names.
- Do not use special characters in names (ex. &, %, #, etc.). This includes periods for initials or abbreviations.
- Enter prefixes and/or suffixes if provided using standard abbreviations.
- Preferred first name is an optional field that can be populated with a name other than the current legal name. The current legal name, however, must also be provided.
- Full legal name field is not used at the University.

5. Address Information

5.A. General

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

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

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

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

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

All addresses must meet U.S. Postal Service addressing requirements. According to the U.S. Postal Service postal addressing standards, **“A standardized address is one that is fully spelled out, abbreviated by using the Postal Service standard abbreviations...and uses the proper format for the address style.”** These guidelines are designed to convey the minimum standard requirements in order to enhance the processing and delivery of mail, reduce instances of undeliverable mail, and position the University to obtain the most advantageous postal rates.

5.B. Address Type

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

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

Identical addresses should only be keyed into different address types if there is a valid purpose for doing so. For example, if a student's mailing address (MA) is identical to his/her permanent address (PR) and/or parent address (PA); the address needs to be entered only into the mailing address (MA) type. Accounts Payable and Purchasing

addresses, however, often need to be separately identified; therefore, it is acceptable to enter identical addresses using the PO, BU, and/or BI address types.

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

- “BI” is the vendor billing address,
- “BU” is the vendor billing address,
- “PO” is the vendor purchasing address,
- “LC” is the local residential address,
- “PA” is the parent address, and
- “PR” is the permanent address.

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

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

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

STVATYP – Address Type Codes.

5.C. Address Data Stewards

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

Address Type	Address Description	Applies	Data Steward Student Addresses	Data Steward Employees Address	Data Steward Vendor Addresses
BI	Billing_ Accounts Payable	Vendor	Accounts Payable	Accounts Payable	Accounts Payable
BU	Business Address	Vendor	Accounts Payable	Accounts Payable	Accounts Payable
CA	Campus Address	Employee, Student	Registrar	Human Resources	NA
LC	Local Residential Address	Employee, Student	Registrar	Human Resources	NA
MA	Mailing Address	Employee, Student, Constituent	Registrar, Accounts Receivable	Human Resources	NA
PA	Parent Address	Student	Registrar	NA	NA
PO	Purchase Order Address	Vendor	Purchasing	Purchasing	Purchasing
PR	Permanent Address	Employee, Student	Registrar	Human Resources	NA

5.D. From/To Dates

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

5.E. Sequence Number

The sequence number field is automatically populated by Banner.

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

The main components of a delivery address are:

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

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

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

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

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

Do not use periods after abbreviations.

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

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

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

5.F.2. Street Names

Street names should be spelled out in their entirety.

Correct:	Incorrect:	
Reservoir Rd	Resvr Rd	Resvr Road (‘Road’ is a street suffix)
Interstate 5	I5	I 5

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

4415 101st St
1901 23rd Ave

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

Correct:	Incorrect
CR 14	County Road 14
County Rd 14	Cnty Rd 14
Rural Rt 14	Rural Route 14
RR 14	Rur Route 14
SCR 14	South County Road 14

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

Correct:

2200 Highway 50
2200 Hwy 50
523 Parkway Rd
523 Green Parkway
6710 Coastal Freeway

Incorrect:

2200 H 50
2200 Hiwy 50
523 Pkwy Rd
523 Green Pkwy
6710 Coastal Fwy

5.F.3. Street Suffixes

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

123 Magnolia St

1401 Main Ave

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

5.F.4. Secondary Unit Designators

If the street address contains a secondary unit designator, such as an apartment, suite, building, etc., the preferred location is at the end of the street address. Abbreviate all secondary unit designators using the standard abbreviations in Appendix C.3.

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

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

Apt C
5800 Springfield Gardens Cir

5.F.5. Compass Directionals

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

1100 S Key West Dr
8912 E Mason South Ct

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

E Main St
Bay Ave SW

5.F.6. P.O. Boxes

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

PO Box 1234

5.F.7. Dual Addresses

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

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

5.F.8. Campus Addresses – University Employees (CA)

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

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

Name:	Name of Employee
Street Line 1:	University Department Name
Street Line 2:	Building and Room Number
Street Line 3:	Campus Box Number
City:	Normal
State:	AL
ZIP:	35762

5.F.9. Campus Addresses – Student On-Campus Housing (CA)

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

Name:	Name of Student
Street Line 1:	Alabama A&M University
Street Line 2:	Name of Building and Room Number
Street Line 3:	Campus Box Number
City:	Normal
State:	AL
ZIP:	35762

5.G. City

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

New Market	Palm Springs
Fort Payne	Pell City

5.H. State or Province

Banner is configured to automatically enter the state name when a zip code is entered. This is the preferred method of entering the state name.

State codes must be entered for all U.S. and Canadian addresses. The appropriate code may be selected using Banner on the state code validation table STVSTAT. The authoritative source for these codes is the Postal Service Address Standards publication. Information from this source is periodically updated by Information Technology Services into the Banner System.

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

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

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

STVSTAT - State or Province Codes.

5.I. Zip or Postal Code

Zip or postal codes **MUST** be entered for all U.S. and Canadian addresses. If available, it should also be entered for other international addresses.

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

A hyphen must be entered when the entire 9-digit zip code is available. If the last four digits are unavailable, enter the first five digits in the first five positions of the field without the hyphen.

97203 97203-4798

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

T2T 2Y5 R2L 1N4

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

GTVZIPC - Zip Codes.

5.J. County

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

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

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

STVCNTY - County codes.

5.K. Nation

A nation code from STVNATN is required for all non-U.S. addresses. DO NOT enter a nation code for U.S. Addresses. Use the Nation Validation Codes from STVNATN to enter nation or country codes. The authoritative source for the Banner System is the FIPS - Federal Information Processing Standard. These standard codes are provided by the United States Post Office and are periodically updated by Information Technology Services into the Banner System. http://www.upu.int/post_code/en/addressing.html

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

STVNATN – Nation Codes.

5.L. International Addresses

Use the Nation Validation codes to enter nation or country codes (STVNATN). The authoritative source for the Banner System is the FIPS - Federal Information Processing Standard. These standard codes are provided by the United States Post Office and are periodically updated by Information Technology Services into the Banner System. http://www.upu.int/post_code/en/addressing.html

Enter an international address into the address fields exactly as provided, including punctuation. Try to avoid commas, however, as much as possible. Do not abbreviate words that are spelled out. If available, the postal code should be entered in the zip/postal code field. Care should be taken to enter international addresses as closely as possible to the format required by that country. The country name appears

automatically when a nation code is entered. The city field is required, and three address lines are available.

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

South Korea (nation)

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

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

France (nation)

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

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

Great Britain (nation)

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

STVNATN – Nation Codes.

5.M. Military Addresses

Overseas military addresses must contain the APO (Army Post Office) or FPO (Fleet Post Office) designation along with a two-character state abbreviation of AE, AP or AA and the zip code. Enter the zip code in the zip code field. The APO or FPO code will default into the city field. The military state code (AA, AE or AP) will also default into the state field.

Use AA for mail in the Americas other than Canada (340).

Use AE for mail going to Europe, the Middle East, Africa and Canada (090-098).

Use AP for mail destined to the Pacific (962-966).

SGT Mario Martian Sgt
Unit 2050 Box 4190
APO AP 96522-1215

Cher Downey
PSC 802 Box 2625
APO AE 90777-0010

Seaman Duane Reeves Division
SS North Dakota
PO AA 34093-2344

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

Col Margaret Henry
Lowry Air Force Base
8205 E 6th Ave
Denver CO 80234

Capt Jack Harris
2314 Barracks St
405 Minot AFB ND 58705

5.N. Telephone Type/Telephone

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

5.O. Inactivate Indicator

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

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

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

5.Q. Validation Tables

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

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

5.R. Summary

- All address information should be entered in normal upper- and lower-case format.
- Do not use special characters (ex. &, %, #, etc.) in any address fields.
- Only use periods, slashes, and hyphens in the street number (39.2 Rd).
- Use *st*, *nd*, *rd*, and *th* on numbered street names. (23rd Ave).
- Abbreviate street suffixes, unit designators, and compass directionals using standard abbreviations (St, Ave, Rd)

- City, state, county, and nation codes are populated automatically when entering a zip code.
- If necessary to manually enter a city name, spell it out in its entirety.
- Enter international addresses exactly as shown (three address lines available for use).
- International state and provinces (excluding Canada) are entered into the city field.
- Military addresses must include and APO or FPO designation along with the appropriate State and Zip codes.

6. Telephone Information

6.A. General

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

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

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

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

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

6.B. Telephone Type

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

STVTELE - Telephone Type Codes.

6.C. Telephone Numbers

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

6.C.1. Area Code

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

6.C.2. Phone Number

Enter the seven-digit number without inserting a hyphen.

3341756

6.C.3. Extension

If an extension number is provided, enter only the digits of the extension. **DO NOT enter EXT or X into the extension field.**

5961 1764

6.D. Primary/Unlisted/Inactive Indicators

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

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

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

6.E. International Access

6.E.1. International Telephone Numbers

International telephone numbers consist of four to seven digits. International telephone numbers should include the country and city codes as part of the international access code field. The country code consists of one to four digits and is required (e.g. 876). The city code consists of one to three digits. Not all countries utilize city codes. The city code is often reported with a leading zero (0). DO NOT enter the zero. "9011" 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

Country Code: 886

Banner Entry

City Code: 3741 (international access code)

553984 (phone number)

City Code:	7	8867 (international access code)
Number:	236-2315	2362315 (phone number)

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

The North American Numbering Plan (NANP) agreement held among many North American countries establishes a procedure for dialing international numbers similar to traditional United States dialing procedures. The country code for all NANP countries is 1. Countries that are members of the NANP can be dialed using 1 plus the three digit area code. Any phone numbers from NANP countries can be entered in the domestic phone number field in the Banner system. Mexico is not a member of NANP. See Appendix C.4. for the listing of countries and area codes in the NANP.

6.F. Comment

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

6.G. Address Type

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

6.H. Sequence

The sequence field is automatically populated by Banner.

6.I. Validation Tables

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

STVTELE – Telephone Type Codes.
STVATYP – Address Type Codes

7. Biographical Information

7.A. Gender

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

This information is maintained for federal and state reporting purposes.

7.B. Birth Date

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

A copy of the birth certificate, passport, or driver's license must be provided with all birth date change requests. The Human Resources Office may enter and/or change faculty and staff birth date information. The Registrar's Office may enter and/or change student birth date information. See Appendix D.1. for standards for entering calendar dates.

7.C. Age

The age field is automatically calculated by Banner.

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

A U.S. SSN should be entered into the SSN/TIN field for "persons" and a TIN should be entered into the SSN/TIN field for "Non-Persons." The entire 9-digit SSN or TIN number should be entered into this field. Dashes and spaces between numbers should be omitted (e.g. 123456789). A SSN is required for all University employees and independent contractors. While it is preferable that students disclose their SSN, a SSN is required only for students applying for financial aid or employment. A SSN is an optional data element for all other constituents of the University. A person must present a copy of his or her Social Security card in order to have his/her SSN or legal name changed within Banner. The Human Resources Office may enter and/or change faculty and staff SSN information. The Registrar's Office may enter and/or change student SSN information. The Purchasing Office may enter and/or change TIN information.

7.E. Confidential Indicator

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

7.F. Deceased Indicator/Date

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

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

7.G. Citizenship

A citizenship code is required for students and employees.

For all other “Person” entries into the Banner system, this field may be populated or left blank to indicate that U.S. citizenship is not known. Citizenship information is used in IPEDS ethnic reporting for institutional research. See the “Validation Table Dictionary” for additional information regarding validation table:

STVCITZ - Citizenship Codes.

7.H. Ethnicity

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

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

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

One of the six IPED’s required ethnicity codes **MUST** be entered for students and employees who are U.S. citizens or U.S. permanent residents: African American; Native American; Asian American; Hispanic; Caucasian; “Does Not Wish to Provide.”

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

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

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

STVETHN - Ethnic Codes

STVETEC - IPEDS Ethnic Codes

7.I. Marital Status

A marital status code is required for all University employees.

A copy of a marriage license or a divorce decree must be provided with all marital status change requests. The Human Resources Office may enter and/or change

employee marital status information. See the “Validation Table Dictionary” for additional information regarding validation table:

STVMRTL - Marital Codes.

7.J. Religion

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

7.K. Legacy

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

7.L. Veteran Information

7.L.1. Veteran File Number

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

7.L.2. Veteran Category

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

STVVETC - Veteran Category Codes.

7.L.3. Active Duty Separation Date

The active duty separation date field is used to enter the date that students and/or employees separate from the University because they are called to active duty in the military. The Human Resources Office may enter and/or change employee active duty separation dates. The Dean of Students Office may enter and/or change student active duty separation dates.

7.L.4. Special Disabled Veteran Indicator

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

7.M. Validation Tables

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

STVCITZ – Citizen Type Codes
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. General

“Persons” or “Non-Persons” may have multiple e-mail addresses within the Banner system. E-mail addresses should be accurate and reflect the most recent data received. University e-mail correspondence to students and employees will be sent **only to University assigned e-mail addresses**. Unless making a correction due to an initial entry error, do not change or delete the prior e-mail address. When adding a subsequent e-mail address of the same type, the prior e-mail address should be ended and the new e-mail address added.

8.B. E-mail Addresses

E-mail addresses follow a standard format. E-mail addresses consist of a log-in name followed by the “@” sign, followed by the domain name. Please refer to the University’s e-mail policy for details regarding University e-mail accounts.

8.C. Comment

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

8.D. Validation Tables

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

GTVEMAL – Email Address Type Codes.

9. Emergency Contact Information

9.A. General

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

9.B. Priority

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

9.C. Contact Name

See Section 4.

9.D. Relationship

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

9.E. Address

See Sections 5.

9.F. Telephone

See Section 6.

9.G. Validation Tables

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

STVRELT – Relation Code

APPENDICES

Appendix A.1.
DATA CHANGE REQUEST FORMS
Individual Change Request Form

Personal information provided on this form is confidential.
 Completed forms should not be reproduced or electronically transmitted without encryption.
 All hard copies of completed forms should be securely stored.
Print Legibly AND attach appropriate Documentation
 Complete only the sections that require changes.

AAMUID#: _____ Mark all that apply: Student Faculty Staff Vendor

Does person requesting changes have a Banner User ID? Yes No Unknown

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

Name Change:

Previous Name	Last	First	Middle	Preferred First Name
Current Name	Last	First	Middle	Preferred First Name

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

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

Changes NOT Requiring Documentation

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

Street	PO Box
City	State
	Zip

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

Telephone # (include Area Code): _____

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

I assume responsibility for all consequences that may occur as a result of these changes. There is no intent on my part to defraud Alabama A&M University.

Signature: _____ Date: _____

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

- Undergraduate Students BEFORE enrollment: *Admissions Office, Room 111, Patton Building*
- Graduate & International Students BEFORE enrollment: *Graduate Studies Office, Room 300, Patton Building*
- All Students & Student Employees AFTER enrollment: *Registrar's Office, Room 204, Patton Building*
- Non-Student employees: *Human Resources Office, Room 113 Patton Building*
- "Person" Vendors who are not and have never been students and/or employees: *Purchasing Office, Room 111, Patton Building*
- "Non-Person" Vendors: **DO NOT USE THIS FORM** – Use the "Non-Person" Vendor Change Request Form.

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

Appendix A.2.
DATA CHANGE REQUEST FORMS

Social Security Number Change Request Form

Personal information provided on this form is **confidential**.
Completed forms should not be reproduced or electronically transmitted without encryption.
All hard copies of completed forms should be securely stored.
Print Legibly AND attach Copy of Social Security Card

AAMUID#: _____

Mark all that apply: Student Faculty Staff Vendor Alumni

Name: _____
 Last First Middle

Birth Date: _____
 (Month/Day/Year)

Change/Correction to Social Security Number—REQUIRES copy of Social Security Card

Current SSN: _____ - _____ - _____

Previous SSN: _____ - _____ - _____

I assume responsibility of all consequences that may occur as a result of these changes. There is no intent on my part to defraud Alabama A&M University.

Signature: _____ Date: _____

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

- Undergraduate Students BEFORE enrollment:
- Graduate & International Students BEFORE enrollment:
- All Students & Student Employees AFTER enrollment:
- Non-Student employees:
- "Person" Vendors who are not and have never been students and/or employees:
- "Non-Person" Vendors: DO NOT USE THIS FORM – Use the "Non-Person" Vendor Change Request Form.

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

Appendix A.3.
DATA CHANGE REQUEST FORMS

Vendor "Non-Person Change Request Form

Personal information provided on this form is confidential.
Completed forms should not be reproduced or electronically transmitted without encryption.
All hard copies of completed forms should be securely stored.
Print Legibly AND attach to W-9 Form for Processing

Request Date: _____ Entry Date: _____

Request Made by: _____

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

Assigned AAMUID Number: _____

"Non-Person" Vendor Name: _____

Previous Legal Name: _____

Correct Legal Name: _____

Other Name Types:

Correct "Alias" Name _____

Correct "Doing Business As" (DBA) Name _____

Correct "Doing Business As" (DBA) AAMUID # _____

Address/Phone number Change:

Correct Address Type

Correct Street Line 1: _____

Correct Street Line 2: _____

Correct Street Line 3: _____

Correct City: _____

Correct State: _____ Correct Zip Code: _____

Correct Phone #: _____ Correct Fax #: _____

Taxpayer Identification Change/Correction:

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

Correct TIN: _____ Incorrect TIN: _____

I assume responsibility for all consequences that may occur as a result of these changes. There is no intent on my part to defraud Alabama A&M University.

Signature: _____ Date: _____

Return this form, with proper W-9 documentation, to the Purchasing Office.

FOR OFFICE USE ONLY

Entered into Banner form:

PPAIDEN SPAIDEN

Change Made by (Employee Name):

Data Steward Dept:

Date of Change:

--	--	--

**Appendix A.4.
DATA CHANGE REQUEST FORMS**

“Person” and “Non-Person” Vendor Create Form

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

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

Request made by: _____ Request Date: _____

Submission Date: _____ Banner Entry Date: _____

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

An AAMU Number has previously been assigned to this Vendor: Yes No

If Yes – Existing AAMU Number: _____

If No – Banner Generated AAMU Number after creation of Vendor: _____

Legal Name:* _____

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

DBA Name: _____ DBA AAMU ID#: _____

Alias Name: _____ (AAMU Numbers not assigned to Alias Names)

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

“Non-Person” Vendors: Taxpayers Identification Number (TIN)** _____

1099 Reportable: Yes No Type of Income: _____

Vendor Type: _____ Discount Code: _____

Address Type: _____ Default Addr Type: _____

Check Name: _____ Check Name: _____

Address Line 1: _____ Address Line 1: _____

Line 2: _____ Line 2: _____

Line 3: _____ Line 3: _____

City: _____ City: _____

State: _____ State: _____

Zip: _____ Zip: _____

Phone: _____ Phone: _____

FAX: _____ FAX: _____

Contact Person: _____ Contact Person: _____

* “Person” Vendors are individuals, who use a Social Security Number for Tax purposes.
 ** “Non-Person” Vendors are Corporations, Partnerships and LLC’s that use a Taxpayer Identification number for Tax purposes.

Appendix A.5. DATA CHANGE REQUEST FORMS

BANNER Oracle USER_NAME ID CHANGE FORM – Instructions

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

- A. The employee must:
 1. Complete an **"Individual Change Request"** form and provide proper documentation for the change;
 2. Complete a **"Banner USER_NAME Change"** form;
 3. These forms and valid documentation are then submitted as follows:
 - a. Non-student employees' documents are submitted to the Human Resources office.
 - b. Student employees' documents are submitted to the Registrar's Office.

- B. The Human Resources Office or Registrar's Office then:
 1. Verifies that the change should be processed from the completed **"Individual Change Request"** form and documentation.
 2. The employee's name is then changed using the appropriate Banner form: "PPAIDEN" or "SPAIDEN." This completes the Banner identifying information change but does not change the employee's Banner user name.
 3. The original **"Individual Change Request"** form is then signed and dated by the employee who made the name change to the Banner System.
 4. A copy of the "Individual Change Request" form is then attached to the original **"Banner USER_NAME Change"** form.
 5. The original **"Individual Change Request"** form is kept in the Human Resources Office or the Registrar's Office to document that the name change was completed in the Banner System.
 6. The **"Banner USER_NAME Change"** form plus the copy of the **"Individual Change Request"** form is then faxed to ITS.
 7. The original **"Banner USER_NAME Change"** form plus a copy of the **"Individual Change Request"** form is then securely filed in the Human Resources Office for both Student employees and Non-student employees.

- C. The Information Technology Services Office (ITS) then:
 1. Creates the new Banner user name to match the employee's revised name.
 2. Initiates the processes necessary to revise the employee's University email address.
 3. Removes the Banner security access for the security classes assigned to the employee's previous Banner user name.
 4. Reassigns the identical Banner security access to the employee's new user name.
 5. Inactivates the employee's previous user name.
 6. The ITS employee who completes this process then signs and dates the faxed copy of the **"Banner USER_NAME Change"** form.
 7. The copy of the **"Banner USER_NAME Change"** form plus the copy of the **"Individual Change Request"** form is faxed to the Business and Finance Office
 8. The copy of the **"Banner USER_NAME Change"** form plus the copy of the **"Individual Change Request"** form is then securely filed within the ITS files.

- D. The Business and Finance Office then:
 1. Removes the employee's budget fund and org security access that was assigned under the previous Banner user name using Banner forms: "FOMUSOR", "FTMFGR" and "FOMPROF".
 2. Reinstates the employee's finance fund and org security access that was assigned under the previous Banner user name to the new Banner user Name using Banner forms: "FOMUSOR", "FOMUSFN", "FTMFMGR", and "FOMPROF".
 3. The Finance employee who completes this process then signs and dates the original **"Banner USER_NAME Change"** form.
 4. The copy of the **"Banner USER_NAME Change"** form plus the copy of the **"Individual Change Request"** form is then faxed to the Payroll Office.
 5. The copy of the **"Banner USER_NAME Change"** form plus the copy of the **"Individual Change Request"** form is then securely filed within the Business and Finance Office's files.

- E. The Payroll Office then:
 1. Removes the employee's payroll org security access that was assigned under the previous Banner user name using Banner forms: "PSAORGN", "PTRUSER" and "GOAEACC".
 2. Reinstates the employee's payroll org security access that was assigned under the previous Banner user name to the new Banner user name using Banner forms: "PSAORGN", "PTRUSER" and "GOAEACC".
 3. The Payroll employee who completes this process signs and dates the original **"Banner USER_NAME Change"** form.
 4. The copy of the **"Banner USER_NAME Change"** form plus the copy of the **"Individual Change Request"** form is then forwarded to the Human Resources office and securely filed with the original documents.

**Appendix A.6.
DATA CHANGE REQUEST FORMS**

BANNER Multiple PIDM Correction Form

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

Incorrect PIDM Information

Incorrect PIDM: _____ Incorrect AAMU#: _____

Name Tied to Incorrect PIDM: _____
Last First Middle

Mark all GUASYST Roles that apply:	<input type="checkbox"/> Admissions Undergrad	<input type="checkbox"/> Admissions Graduate	<input type="checkbox"/> Registration	<input type="checkbox"/> General Student
	<input type="checkbox"/> Financial Aid	<input type="checkbox"/> Accounts Receivable	<input type="checkbox"/> Vendor (AP)	<input type="checkbox"/> None

Correct PIDM Information

Correct PIDM: _____ Correct AAMU #: _____

Name Tied to **Correct** PIDM: _____
Last First Middle

Mark all GUASYST Roles that apply:	<input type="checkbox"/> Admissions Undergrad	<input type="checkbox"/> Admissions Graduate	<input type="checkbox"/> Registration	<input type="checkbox"/> General Student
	<input type="checkbox"/> Financial Aid	<input type="checkbox"/> Accounts Receivable	<input type="checkbox"/> Vendor	<input type="checkbox"/> None

Preliminary containment steps to be completed by University employee initiating this form:

DO NOT USE added to the name tied to the **Incorrect** PIDM Date completed: _____

“Multiple PIDM” Hold assigned to **Incorrect** PIDM Date completed: _____

Name of employee who added “DO NOT USE” and Multiple PIDM Hold Department _____ Phone Number _____
Forward this form to Undergraduate Admissions Data Steward.

Data Steward Multiple PIDM correction and Information technology authorization processes:

Undergraduate Admissions:

Using standard Banner processes, all information possible has been moved or removed from the Incorrect PIDM.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> NA
If yes, <u>AND</u> the incorrect PIDM has <u>ONLY</u> an Admission role, Information Technology Services is authorized to purge all remaining data from the Incorrect PIDM.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> NA
Do any of the affected individuals need to be notified of an AAMU ID # change?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> NA
If yes, the individual was notified of the AAMU ID # change on _____ (Date) Via <input type="checkbox"/> Phone <input type="checkbox"/> E-Mail <input type="checkbox"/> Postal Svc			

Authorized Data Steward Name _____ Signature _____ Date _____
Forward this form to Graduate Studies Data Steward, Room 300, Patton Building

**Appendix A.6.
DATA CHANGE REQUEST FORMS**

BANNER Multiple PIDM Correction Form

Incorrect Last Name: _____ **Incorrect AAMU #:** _____

Data Steward Multiple PIDM correction and Information Technology authorization processes:
(Continued from Page 1 and Forwarded from Undergraduate Admissions Data Steward)

Graduate Studies:

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

If yes, **AND** the incorrect PIDM has **ONLY** an Admission role, Information Technology Services is authorized to purge all remaining data from the Incorrect PIDM. Yes No NA

Do any of the affected individuals need to be notified of an AAMU ID # change? Yes No NA

If yes, the individual was notified of the AAMU ID # change on _____ (Date) Via Phone E-Mail Postal Svc

Authorized Data Steward Name _____ Signature _____ Date _____
Forward this form to Registrar Data Steward, Room 204, Patton Building

Registrar:

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

If yes, **AND** the incorrect PIDM has **ONLY** an Admission role, Information Technology Services is authorized to purge all remaining data from the Incorrect PIDM. (NO=NA for Registrar) Yes No NA

Do any of the affected individuals need to be notified of an AAMU ID # change? Yes No NA

If yes, the individual was notified of the AAMU ID # change on _____ (Date) Via Phone E-Mail Postal Svc

Authorized Data Steward Name _____ Signature _____ Date _____
Forward this form to Financial Aid Data Steward, Room 209, Patton Building

Financial Aid Data Steward:

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

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

Do any of the affected individuals need to be notified of an AAMU ID # change? Yes No NA

Authorized Data Steward Name _____ Signature _____ Date _____
Forward this form to Accounts Receivable Data Steward, Room 105, Patton Building

Accounts Receivable/Bursar Data Steward:

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

Information Technology Services is authorized to purge all remaining data from the Incorrect PIDM. NA for Accounts Receivable

Do any of the affected individuals need to be notified of an AAMU ID # change? NA for Accounts Receivable

Authorized Data Steward Name _____ Signature _____ Date _____
Forward this form to Human Resources Data Steward, Room 113, Patton Building

Appendix A.6.
DATA CHANGE REQUEST FORMS
BANNER Multiple PIDM Correction Form

Incorrect Last Name: _____ **Incorrect AAMU #:** _____

Data Steward Multiple PIDM correction and Information Technology authorization processes:
(Continued from Page 2 and Forwarded from Accounts Receivable/Bursar Data Steward)

Human Resources:

The incorrect Employee AAMU ID# has been marked "Inactive" on Human Resources Banner form PEAEMPL.	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	NA
Using standard Banner processes, all information possible has been moved or removed from the Incorrect PIDM.	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	NA
If yes, AND the incorrect PIDM has ONLY a Human Resources role, AND the employee has NEVER been paid						

Information Technology Services is authorized to purge all remaining data from the Incorrect PIDM.	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	NA
--	--------------------------	-----	--------------------------	----	--------------------------	----

Do any of the affected individuals need to be notified of an AAMU ID # change?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	NA
--	--------------------------	-----	--------------------------	----	--------------------------	----

If yes, the individual was notified of the AAMU ID # change on _____ (Date) Via <input type="checkbox"/> Phone <input type="checkbox"/> E-Mail <input type="checkbox"/> Postal Svc
--

Authorized Data Steward Name _____ Signature _____ Date _____
Forward this form to Payroll Data Steward, Room 105, Patton Building

Payroll:

The incorrect Employee AAMU ID# has been marked "Terminated" on Human Resources Banner form PEAEMPL.	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	NA
---	--------------------------	-----	--------------------------	----	--------------------------	----

Using standard Banner processes, all information possible has been moved or removed from the Incorrect PIDM.	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	NA
--	--------------------------	-----	--------------------------	----	--------------------------	----

Information Technology Services is authorized to purge all remaining data from the Incorrect PIDM.	<input type="checkbox"/>	NA for Payroll				
--	--------------------------	----------------	--	--	--	--

Do any of the affected individuals need to be notified of an AAMU ID # change?	<input type="checkbox"/>	NA for Payroll				
--	--------------------------	----------------	--	--	--	--

Authorized Data Steward Name _____ Signature _____ Date _____
Forward this form to Vendor(AP/Purchasing) Steward, Room 111, Patton Building

Vendor (AP/Purchasing):

The incorrect Vendor AAMU ID# has been marked "Terminated" on Vendor Banner form FTMVEND.	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	NA
Using standard Banner processes, all information possible has been moved or removed from the Incorrect PIDM.	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	NA

If yes, AND the incorrect PIDM has ONLY a Vendor role, AND the Vendor has NEVER been paid						
Information Technology Services is authorized to purge all remaining data from the Incorrect PIDM.	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	NA
Do any of the affected individuals need to be notified of an AAMU ID # change?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	NA

If yes, the individual was notified of the AAMU ID # change on _____ (Date) Via <input type="checkbox"/> Phone <input type="checkbox"/> E-Mail <input type="checkbox"/> Postal Svc
--

Authorized Data Steward Name _____ Signature _____ Date _____
Forward this form to information Technology Services, Room 316, Patton Building

To be completed by Information Technology Data Base Administrator:

Check GUASYST to ensure that the Data Steward for EVERY role has completed the required steps and signed this form.	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
The incorrect PIDM does not have ANY data other than a "DO NOT USE" name and a Multiple PIDM Hold record.	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
The incorrect PIDM does not have ANY data other than a "DO NOT USE" name and a Multiple PIDM Hold record	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
If yes, AND AUTHORIZED BY THE ABOVE DATA STEWARDS , the incorrect PIDM has been purged.	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No

Authorized Data Steward Name _____ Signature _____ Date _____
Forward this form to information Technology Services, Room 316, Patton Building

Appendix B

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

Requestor Name:

School or Division:

Phone Number:

Validation Table Name:

Validation Table Steward:

Mark One: New Validation Table Code Change to Validation Table Code

Requested Change to Data Standard (include supporting documentation):

Requested Change to Validation Table (include supporting documentation):

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

Approved Denied

Date Steward: Date:

Data Standards Committee Chair: Date:

Comments:

Appendix C

Abbreviations and Crosswalk Tables

C.1 Prefixes

Doctor	Dr
Father	Fr
Governor	Gov
Honorable	Hon
Judge	Judge

Professor	Prof
Rabbi	Rabbi
Representative	Rep
Reverend	Rev
Senator	Sen

C.2 Suffixes

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

C.3 Address Abbreviations

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

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

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

C.4 North American Numbering Plan (NANP)

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

Country	Area Code
Montserrat	664
New Brunswick	506
Newfoundland	709
Northern Marianas Islands (Saipan, Rota & Tinian)	671
Nova Scotia	902
Ontario	416/519/647/705/807/905
Puerto Rico	Rico 787/939
Quebec	418/450/514/613/819
Saskatchewan	306
St. Kitts/Nevis	869
St. Lucia	758
St. Vincent and Grenadines	784
Trinidad and Tobago	868
Turks and Caicos Islands	649
U.S. Virgin Islands	340
Yukon, NW Territory, Nunavut	867

Appendix D

Miscellaneous

D.1 Calendar Dates

Date fields appear on forms throughout the Banner system.

Banner is set up to accept dates in the format month; day; year.

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

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

Always enter two digits for the month and day.

Enter January as 01

Enter the 5th day of the month as 05

The default method for entering dates is **DD-MON-CCYY** (ex. 05-MAR-2008). 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, 2008 can be entered in any of the following ways:

03052008 03/05/2008 03-05-2008 05-MAR-2008

In all cases, the date will be stored as: 05-MAR-2008

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-2008, not 26-JUN-08. Zeros are entered for the century if the century is omitted. In this example, entering 26-JUN-08, results in the date of 26-JUN-0000; not 26-JUN-2008.

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.

Appendix D

Miscellaneous

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:"

ARI	AAMU Research Institute	GRST	Graduate Studies	PUR	Purchasing
ACAF	Academic Affairs	HON	Honors Center	REG	Registrar
ACAV	Academic Advising	HOU	Housing	RESL	Residential Life
ACCO	Academic Computing	HR	Human Resources	SBA	State Black Archives
ADM	Admissions	IPR	Information and Public Relations	SEN	Staff Senate
ALAF	Alumni Affairs	ITS	Information Technology Svcs	SAES	SAES
ATHL	Athletics	INAD	Institutional Advancement	SAS	School of Arts and Sciences
AUX	Auxiliary Services	IRPS	Inst Research Planning, Sponsored Prog	SBUS	School of Business
BGT	Budget Office	INAU	Internal Audit	SED	School of Education
BUFN	Business and Finance	INPG	International Programs	SEG	School of Engineering
CADV	Career Development	LRC	Learning Resource Center	SPSS	Special Student Svcs
CEED	Ctr for Entrepreneurship	OCE	OCEANS	STAF	Student Affairs
CSD	Communicative Sciences	OIP	OIPRE	STH	Student Health
CPT	Comptroller	ORAS	ORAS	SSS	Student Support Svcs
COOP	Cooperative Extension	PHFA	Physical Facilities	TEST	Testing
CODV	Counseling and Development	PRES	President	TRIO	TRIO
EHS	Environmental Health	PRT	Printing	UNCO	University College
FAID	Financial Aid	PRMG	Property Management	VET	Veteran's Affairs
GC	General Counsel	PUSA	Public Safety	VC	Voice Communications

D.4 Quick-flow Names

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

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

ARI	AAMU Research Institute	GRST	Graduate Studies	PUR	Purchasing
ACAF	Academic Affairs	HON	Honors Center	REG	Registrar
ACAV	Academic Advising	HOU	Housing	RESL	Residential Life
ACCO	Academic Computing	HR	Human Resources	SBA	State Black Archives
ADM	Admissions	IPR	Information and Public Relations	SEN	Staff Senate
ALAF	Alumni Affairs	ITS	Information Technology Svcs	SAES	SAES
ATHL	Athletics	INAD	Institutional Advancement	SAS	School of Arts and Sciences
AUX	Auxiliary Services	IRPS	Inst Research Planning, Sponsored Prog	SBUS	School of Business
BGT	Budget Office	INAU	Internal Audit	SED	School of Education
BUFN	Business and Finance	INPG	International Programs	SEG	School of Engineering
CADV	Career Development	LRC	Learning Resource Center	SPSS	Special Student Svcs
CEED	Ctr for Entrepreneurship	OCE	OCEANS	STAF	Student Affairs
CSD	Communicative Sciences	OIP	OIPRE	STH	Student Health
CPT	Comptroller	ORAS	ORAS	SSS	Student Support Svcs
COOP	Cooperative Extension	PHFA	Physical Facilities	TEST	Testing
CODV	Counseling and Development	PRES	President	TRIO	TRIO
EHS	Environmental Health	PRT	Printing	UNCO	University College
FAID	Financial Aid	PRMG	Property Management	VET	Veteran's Affairs
GC	General Counsel	PUSA	Public Safety	VC	Voice Communications

Appendix E
Shared Validation Tables
Schedule of Validation and Rule Tables in Alpha Order
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NAME	Validation/Rule Description	Data Steward	Shared/ Not Shared	Not Used by AAMU
FTVACCI	Account Index Codes	Business and Finance	Shared	
FTVACCT	Account Codes	Business and Finance	Shared	
FTVACTV	Activity Codes	Business and Finance	Shared	
FTVCOAS	Chart of Accounts	Business and Finance	Shared	
FTVFUND	Fund Codes	Business and Finance	Shared	
FTVLOCN	Location Codes	Business and Finance	Shared	
FTVOBUD	Operating Budget Codes	Business and Finance	Shared	
FTVORGN	Organization Codes	Business and Finance	Shared	
FTVPROG	Program Codes	Business and Finance	Shared	
GORNAME	Name Translation Rules	Project Mgmt Team	Shared	
GTVCCRD	Cross Product Credit Card Types	Business and Finance	Shared	
GTVCMSC	Common Matching Source Codes	Project Mgmt Team	Shared	
GTVCURR	Currency Codes	Business and Finance	Shared	
GTVDICD	District Division Codes	Project Mgmt Team	Shared	
GTVDUNT	Duration Unit Codes	Registrar	Shared	
GTVEMAL	E-mail Address Types	Registrar	Shared	
GTVEXPN	Expense Codes	Business and Finance	Shared	
GTVFDMN	FGAC Domain Codes	Project Mgmt Team	Shared	
GTVFDTP	FGAC Domain Type Codes	Project Mgmt Team	Shared	
GTVINSM	Instructional Method Codes	Registrar	Shared	
GTVLETR	Letter Codes	Project Mgmt Team	Shared	
GTVMAIL	Mail Codes	Project Mgmt Team	Shared	
GTVMTYP	Meeting Type Codes	Registrar	Shared	
GTVNTYP	Name Type Codes	Registrar	Shared	
GTVPARA	Paragraph Codes	Project Mgmt Team	Shared	
GTVPARS	Partitions Codes	Registrar	Shared	
GTVSCHS	Scheduling Status Codes	Registrar	Shared	
GTVSCOD	EDI/ISO Standard Codes	Information Technology	Shared	
GTVSUBJ	Subject Index Codes	Registrar	Not Shared	
GTVTRTP	EDI Transaction Code Types	Information Technology	Shared	
GTVZIPC	ZIP/Postal Codes	Information Technology	Shared	
GXVDIRD	Bank Routing Numbers	Business and Finance-HR	Shared	
SMAPRLE	Program Definition Rules	Registrar	Shared	
STVACAT	Degree Award Category Codes	Admissions	Shared	
STVACCG	Activity Categories	Admissions	Shared	
STVACPR	Acceptance Practice Codes	Admissions	Not Shared	
STVACST	Institution Accreditation Codes	Admissions	Not Shared	
STVACTC	Activity Codes	Registrar	Shared	
STVACTN	Action Codes	Registrar	Not Shared	
STVACTP	Activity Type Codes	Admissions	Shared	
STVACYR	Academic Year Codes	Admissions	Shared	
STVADMR	Admissions Request Checklist Codes	Admissions	Shared	
STVADMT	Admission Type Codes	Admissions	Shared	
STVADPC	Admission Application Decision Codes	Admissions	Not Shared	
STVAPST	Admission Application Status Codes	Admissions	Shared	
STVASCD	Room Assignment Codes	Admissions	Shared	
STVASRC	Admissions Address Source Codes	Registrar	Shared	
STVASTD	Academic Standing Codes	Registrar	Not Shared	
STVASTY	Assignment Type Codes	Registrar	Shared	
STVATTR	Attribute Validation Codes	Registrar	Not Shared	
STVATTS	Student Attribute Codes	Registrar	Shared	
STVATYP	Address Type	Registrar	Shared	
STVBCHR	Background Inst. Characteristic Codes	Registrar	Shared	

Appendix E
Shared Validation Tables (Contd)
Schedule of Validation and Rule Tables in Alpha Order
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NAME	Validation/Rule Description	Data Steward	Shared/ Not Shared	Not Used by AAMU
STVBLDG	Building Codes	Registrar	Shared	
STVCACT	Curriculum Activity Status Codes	Registrar	Not Shared	
STVCALD	Calendar Codes	Registrar	Not Shared	
STVCAMP	Campus Codes	Registrar	Shared	
STVCERT	Ceremony Type Codes	Registrar	Not Shared	
STVCIPC	CIP Program Codes	Registrar	Shared	
STVCITZ	Citizen Type Codes	Registrar	Shared	
STVCLAS	Class Codes	Registrar	Shared	
STVCNTY	County Codes	Information Technology	Shared	
STVCOLL	College Codes	Registrar	Shared	
STVCTYP	Contact Type Codes	Admissions	Not Shared	
STVDAYS	Days of the Week	Registrar	Shared	
STVDEGC	Degree Codes	Registrar	Shared	
STVDEPT	Department Codes	Registrar	Shared	
STVDISA	Disability Type Codes	Registrar	Shared	
STVDIVS	Division Codes	Registrar	Shared	
STVDLEV	Degree Level Codes	Registrar	Shared	
STVDPLM	Diploma Types	Registrar	Shared	
STVDRES	Ceremony Dress Codes	Registrar	Not Shared	
STVEDLV	Education Level Codes	Registrar	Not Shared	
STVEMPT	Employment Types	Graduate School	Shared	
STVESTS	Enrollment Status Codes	Registrar	Not Shared	
STVETCT	IPEDS Ethnic Codes	Registrar	Shared	
STVETHN	Ethnic Codes	Registrar	Shared	
STVETYP	Event/Function Type Codes	Registrar	Shared	
STVEVEN	Academic History Event Codes	Registrar	Not Shared	
STVFCNT	Faculty Contract Type Codes	Human Resources	Shared	
STVGCHG	Grade Change Codes	Registrar	Shared	
STVGCMT	Grade Comment Codes	Registrar	Not Shared	
STVGEOG	Geographic Region Division Codes	Registrar	Shared	
STVGEOR	Geographic Region Codes	Registrar	Shared	
STVGMOD	Grading Modes	Registrar	Shared	
STVGRST	Graduation Status Codes	Registrar	Not Shared	
STVHLDD	Hold Type Codes	Registrar	Shared	
STVHLWK	Highest Level of Work Codes	Admissions	Not Shared	
STVHOND	Departmental Honors Codes	Registrar	Shared	
STVHONR	Institutional Honors Codes	Registrar	Shared	
STVINFC	Interface Validation Codes	Information Technology	Shared	
STVINIT	Initials Codes	Admissions	Shared	
STVINNM	Awarding Institution Codes	Registrar	Not Shared	
STVLANG	Language Codes	Graduate School	Shared	
STVLEAD	Leadership Codes	Registrar	Shared	
STVLEVL	Level Codes	Registrar	Not Shared	
STVLGCY	Legacy Codes	Registrar	Shared	
STVMAJR	Major, Minor, Concentration Codes	Registrar	Shared	
STVMATL	Material Codes	Graduate School	Shared	
STVMDEQ	Medical Equipment Codes	Registrar	Shared	
STVMEAS	Measurement Codes	Registrar	Not Shared	
STVMEDI	Medical Codes	Registrar	Shared	
STVMRTL	Marital Status Codes	Human Resources	Shared	
STVNATN	Nation Codes	Information Technology	Shared	
STVNCRQ	Non-Course Requirement Codes	Registrar	Not Shared	
STVNCST	Non-Course Requirement Status Codes	Registrar	Not Shared	
STVORIG	Originator Codes	Registrar	Shared	

Appendix E
Shared Validation Tables (Contd)
Schedule of Validation and Rule Tables in Alpha Order
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NAME	Validation/Rule Description	Data Steward	Shared/ Not Shared	Not Used by AAMU
STVPENT	Port of Entry Codes	Graduate School	Shared	
STVPRCD	Phone Rate Codes	Registrar	Shared	
STVPRGA	Program Accreditation Codes	Admissions	Not Shared	
STVPTYT	Contact Person Type Codes	Admissions	Shared	
STVPWAV	Prerequisite Waiver Codes	Registrar	Not Shared	
STVQPTP	Qualifying Paper Codes	Registrar	Not Shared	
STVRDEF	Building/Room Attribute Codes	Registrar	Shared	
STVRELG	Religion Codes	Registrar	Shared	
STVRELT	Relation Codes	Registrar	Shared	
STVRESO	Residency Code Validation	Registrar	Not Shared	
STVRMST	Room Status Codes	Registrar	Shared	
STVRRCD	Room Rate Codes	Registrar	Shared	
STVRSTS	Registration Status Codes	Registrar	Not Shared	
STVSBGI	Source/Background Institution Codes	Admissions	Shared	
STVSBCH	Schedule Type Codes	Registrar	Not Shared	
STVSITE	Site Codes	Registrar	Shared	
STVSIZE	Academic Dress Size Codes	Registrar	Not Shared	
STVSPON	Student Sponsor Codes	Admissions	Shared	
STVSTAT	State/Province Codes	Information Technology	Shared	
STVSTST	Student Status Codes	Registrar	Not Shared	
STVSTYP	Student Type Codes	Registrar	Not Shared	
STVSUBJ	Subject Codes	Registrar	Shared	
STVTAUU	Acceptance Authority Codes	Admissions	Not Shared	
STVTAAT	Transfer Articulation Codes	Admissions	Not Shared	
STVTELE	Telephone Types	Registrar	Shared	
STVTERM	Term Codes	Registrar	Not Shared	
STVTESC	Test Codes	Admissions	Shared	
STVTLVL	Transfer Level Codes	Admissions	Not Shared	
STVTMST	Time Status Codes	Registrar	Not Shared	
STVTPRT	Transcript Type Codes	Registrar	Not Shared	
STVTRMT	Term Types	Registrar	Not Shared	
STVTSRC	Admission Test Score Source Codes	Admissions	Not Shared	
STVTYPE	Academic Dress Type Codes	Registrar	Not Shared	
STVVITY	Visa Type Codes	Graduate School	Shared	
STVWACK	Web Acknowledgements	Registrar	Not Shared	
STVWAIV	Application Fee Waiver Codes	Admissions	Not Shared	
STVWDRL	Student Withdrawal Codes	Registrar	Not Shared	
TSAISTC	Installment Plan Code Control	Bursar	Not Shared	
TSATBDS	Term-Based Designator	Bursar	Not Shared	
TTVBILL	Billing Codes	Bursar	Not Shared	
TTVCCRD	Voice Response Credit Card Types	Bursar	Not Shared	
TTVDCAT	Detail Category Code	Bursar	Not Shared	
TTVDELI	Delinquency Codes	Bursar	Not Shared	
TTVDTYP	Deposit Type Codes	Bursar	Not Shared	
TTVECAT	Entity Category Codes	Bursar	Not Shared	
TTVPAYT	Payment Type Codes	Bursar	Not Shared	
TTVREPT	Tax Report	Bursar	Not Shared	
TTVRHLD	Auto-Hold Codes	Bursar	Not Shared	
TTVSBRC	Schedule/Bill Codes	Bursar	Not Shared	
TTVSRCE	Change Payment Source Codes	Bursar	Not Shared	
TTVTBDS	Term-Based Indicator	Bursar	Not Shared	
TTVTPRC	Third Party Billing Rule Codes	Bursar	Not Shared	
TTVVAUTH	Authorization Validation Codes	Bursar	Not Shared	

Appendix F
Current Data Standards Team Members

Raymond Turner	Administrative Computing Services, Chairperson	4184
Patricia Bullard	Collections	5195
Lydia Johnson	Administrative Computing Services	8319
Christine Malone	Voice Communications	8312
Sibyl Moore	Alumni Affairs	5287
Mary Morrow	Admissions	4879
Arthello Peagler	Registrar	8196
Marilyn Saintjones	Graduate Studies	5277
Catharine Strother	School of Business	4813
Jason Teng	Financial Aid	4326
Mary Walker	Administrative Computing Services	5721