Data Entry Standards for General Person

Approved by Data Management Committee on March 14, 2024
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Applications Training- 5800, training@wichita.edu
Training and Support. Assists faculty and staff with
- myWSU, Banner, Self Service and Reporting Services/WSU Reporting
- Microsoft Office
- Adobe Products

Technology Help Desk- HELP (4357), helpdesk@wichita.edu
Passwords, hardware and software support for students, faculty and staff

Data Management Committee- 7157, David.Wright@wichita.edu
David Wright, Chief Data Officer, Chair

Data Standards Unit Leads

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Section B- Identification Numbers

Overview

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

- **PIDM**: The internal unique identification number in Banner. It is a one-up number assigned internally when a person is created and is the key that binds a person's data across all the Banner tables. The PIDM is stored internally in Banner and is not visible to most users of Banner or Self-Service Banner.

- **Banner ID:** This ID has nine characters (X followed by an eight-digit number) that appears in the "ID" field on Banner forms that pertain to that person's record.

- **myWSU ID**: The myWSU ID or the publicly viewable identification number is generated. Its configuration includes a character, 3 numbers, character, 3 numbers.

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

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

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

Duplicate PIDMs

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

"Duplicate PIDM" is actually a misnomer and is presented only to alert those entering data of the terminology used by Banner materials and in discussion with other Banner Schools. In reality the term "Duplicate PIDM" refers to the situation where a unique

person or vendor has been assigned multiple PIDMs. A person with two different PIDMs has two distinct sets of records. Since the term myWSU ID is more familiar to everyone, we will refer to this situation as multiple myWSU IDs for the same person.

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

A person/vendor with more than one *myWSU* ID is identified if one of the following is true:
- Two persons have the same SSN and the SSN is accurate.
- Two vendors have the same FEIN and the FEIN is accurate.

A potential person/vendor with more than one *myWSU* ID is identified if one of the following is true:
- Two persons have the same Name and Birth date
- Two persons have the same SSN and Name and Birth date
- Two persons have the same SSN and Birth date
- Two persons have the same SSN and Name
- Other possibilities may exist

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

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

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

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

Human Resources
Staff should search GUIALTI using all names, SSN, and DOB if available. Employees responsible for data entry will also thoroughly search for persons on GUISRCH (using

student's email address) or SOAIDEN (using all names) before attempting to create a new record. If the person is not found using GUIALTI, GUISRCH or SOAIDEN, a new record will be created using GOAMTCH.

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

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

Graduate School Admissions and Undergraduate Domestic Admissions
Initially, staff search GUIALTI using all names, SSN, and DOB if available. Employees responsible for data entry will also thoroughly search for students on GUISRCH (using student's email address) or SOAIDEN (using all names) before attempting to create a new record. If the student is not found using GUIALTI, GUISRCH or SOAIDEN, a new record will be created using GOAMTCH.

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

Shocker Card Center
If the Card Center identifies a student with two IDs, HR.ServiceCenter@wichita.edu, or Brett Morrill will be notified in the priority order listed. A new ID card should not be made for a student who already has an ID in the system.

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

Procedure for Multiple Record PIDM (MRP) Correction

General Principles
1. Only Human Resources may mark an HR record as a duplicate.
2. If a student has a SGASTDN record, only the Registrar's Office may mark a record as duplicate.
3. Duplicate admission/recruit records will be made by the Admission Offices.
4. Do not remove or inactivate a (BU) business address type EVER. Contact Accounts Payable.
5. Never touch if HR is involved or academic history, involve HR or the RO.

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

MRP Representatives

Unit	Name	Email	Ext.
Card Center	David Kidd	david.kidd@wichita.edu	7070
Accounts Payable	Kristie Courtney	kristie.courtney@wichita.edu	5988
Financial Aid	Jeff Bever	jeff.bever@wichita.edu	5023
Graduate School	Jordan Oleson	jordan.oleson@wichita.edu	6603
Human Resources	Kim Thompson	kim.thompson@wichita.edu	3478
Human Resources-NIAR	Raegan Brown	raegan.brown@idp.wichita.edu	6425
International Education	Sheri Faissal	Sheri.faissal@wichita.edu	6031
Registrar's Office	Kristi Hughes	kristi.hughes@wichita.edu	3073
Undergraduate Admissions	Laurel Houk	laurel.houk@wichita.edu	5428
Accounts Receivable	Ryan Lohfink	ryan.lohfink@wichita.edu	6014
Research	Karen Davis	karen.davis@wichita.edu	6808

Discovery of MRPs
ITS will institute data audits of MRPs on a daily basis to be available on the web for viewing by MRP Representative through WSU Reporting.

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

MRP Representative will also notify ITS when the data audit generates records which are not to be considered as duplicates. The MRP Representative does this by adding a SPACMNT note with the comment type of NDP (Not Duplicate Person). This in turn removes the records from the Data Integrity reports.

ITS generated data audits will include:
- record identification
- functional areas affected
- record content and location
- user/unit responsible for data creation/modification of record

Resolving MRPs

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

If a MRP exists within a <u>**SINGLE functional area**</u>, the functional area should have written procedures about the process of correcting MRPs including:
- How to determine which record(s) should be the "good" or primary record.
- Process for moving data from "bad" to "good" records.
- What type of data can NOT be altered

If a MRP exists <u>**among MULTIPLE functional areas**</u>:
- A meeting or communication must be held involving all affected functional areas MRP Representatives to establish which records/content must be changed and who will have responsibility for the record change.

If the departments involved cannot resolve the issue, the chair of the data management committee (David Wright) should be contacted.

Once an agreement has been made as to which record shall be marked duplicate, it will also be decided which functional area(s) will need to move and delete functional information AND which will be responsible to mark the record as a duplicate.

Functional areas responsible for moving data will:
1. Move all data that needs to be moved for your functional area to the "correct" record
2. Delete this same data (as permitted by the system) from the "bad" record.

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

Preventing MRPs

ITS will maintain a database of known MRPs including the classification of:
- MRP type
- Functional areas affected
- End-user/unit ID for record creation/modification
- Frequency, quantity, date/time of MRP events

MRP representatives will have access to the ITS MRP database to review MRP event frequency for their functional area and will be responsible for instituting practices to

eliminate the occurrence of MRP events. The database is located in the Data Integrity Folder in WSU Reporting.

Mark Record as Duplicate
The functional area responsible to mark the record as duplicate will:
1. On SPAIDEN under the **Current Identification** tab, change 'Name Type' to DUPL.
2. Change 'Last Name' to DUPLICATE RECORD (NO other characters!).
3. Leave 'First Name' as is.
4. Save the record.

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

In addition, the following steps should be taken by the Rep marking the record as duplicate:

- Move address, phone, email, SSN, DOB, and other data from the "bad" record SPAIDEN to the "correct" record.
- After moving all BIO info to "correct" SPAIDEN, delete all of the following from the "bad" record:
- Date of birth
- SSN (check with HR first if employee)
- All Address records – do not remove or inactivate BU address
- All Phone records
- All e-mail records
- Enter 'DUPL' on additional identification tab on SPAIDEN on "bad" ID.
- Enter 'DUPL' on additional identification tab on SPAIDEN on "correct" ID.
- Add a note in SPACMNT: DUPLICATE RECORD: WSU ID#1 & WSU ID#2 then date & your initials

It is possible that both ID's have imaged files connected with them. If the "bad" record includes an admission or student record, the MRP rep should attempt to determine if two image files exist (if questions, contact Registrar's Office MRP Representative).

In many cases, we have corrected the entry that was previously "DELETE RECORD", and changed the current name to DUPLICATE RECORD, or even corrected a misspelling of duplicate or record – thus creating an incorrect entry on the Alternate Identification tab. In order to remove a "bad" entry on the Alternate Identification tab, follow these steps:
- Select the name entry to be removed by moving your arrow keys or clicking on the name entry. It will be highlighted if you have selected it properly. Again, remove ONLY "bad" records – never remove the original entry that included the full name of person.

- Once the record is highlighted, do a record remove (Shift-F6, or select the record remove option either from the tool bar or from the "Record" drop down). You will be warned that you will delete that record. Verify that you are about to delete the correct name entry, then select Continue. You will see the name is immediately removed from the form.
- Save the record (F10 or the save icon)

Section C: Basic Guidelines for Data Entry

- Must have a minimum of three of the following in order to create a person:
  - Name
  - Address
  - Telephone Number
  - Date of Birth
  - Country
  - Citizenship
  - Email
  - Social Security Number

- **Do not use the pound sign (#),** curly **quotation marks (" "),** curly **apostrophes (') or the percent sign (%) in any data field, for any reason.** If you have to use quotation marks or apostrophes, use straight ones to avoid the data issues:

  From Word (in order to copy/paste into Banner):
  1. On the File tab, click Options.
  2. Click Proofing, and then click AutoCorrect Options.
  3. In the AutoCorrect dialog box, do the following: Click the AutoFormat As You Type tab, and under Replace as you type, remove the check mark on the "Straight quotes" with "smart quotes" check box
  4. Click OK.

  From Outlook (in order to copy/paste into Banner):
  1. On the File tab, click Options.
  2. Click Mail
  3. Editor Options (or Spelling and Editor Options)
  4. Auto Correct option
  5. In the AutoCorrect dialog box, do the following: Click the AutoFormat As You Type tab, and under Replace as you type, remove the check mark on the "Straight quotes" with "smart quotes" check box
  6. Click OK.

- Use data-friendly fonts :
  Do NOT use **serif fonts** (e.g., New Time Roman, Garamond, Georgia) which have decorative end points on letters, these are fine for love notes and novels but create havoc on business or technical documents.

  Do USE **sans serif fonts** (Arial, Helvetica) which have stick or slightly rounded end points on letters. Arial is recommended for Word, Excel and PowerPoint. Arial is recommended because it keeps it's clarity and legibility regardless of font size (Calibri, the MS default, does not). Arial also works best in Excel and PowerPoint for its consistency.

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- Use proper keyboard characters when entering numeric data:
  - Use a numeric 1 (one), not a capital "I" (i) or lowercase "l" (L).
  - Use a numeric 0 (zero), not a capital "O" (o).

- Enter punctuation in names and addresses ONLY when it is a required part of the official, legal name. (Example: O'Leary). See Name Standards below for details.

- Enter all data using mixed case (uppercase and lowercase) and standard capitalization rules.

- Be knowledgeable of the forms and the fields within the forms in which you are allowed to enter data.

- Double-check that the data on any paperwork matches the data that is being entered into Banner.

- Use the data entry rules specific to the field that is being updated.

- Do not perform tasks that you have not been trained in or received security approval even if one is able to do so.

When left in the default mode, searches in Banner search forms are case sensitive. To minimize chances of error when searching, be sure to select the "Case Insensitive Query" option at the bottom of the forms.

Section D: Name Standards- Person

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

- **SPAIDEN** (Student/FA modules)
- **PPAIDEN** (HR module)
- **FOAIDEN** and **FTMVEND** (Finance module)
- **APAIDEN** (Alumni is no longer entering in Banner or updating any existing APAIDEN records)
- **FTMAGCY** (Research)

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

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

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

Name Changes

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

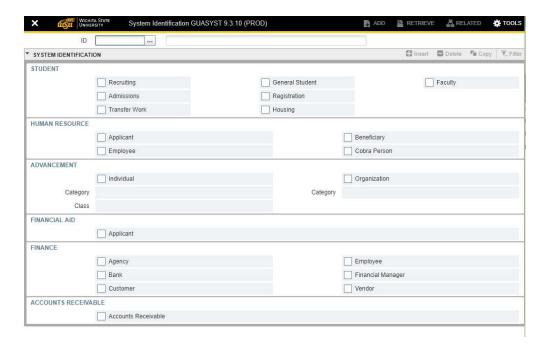Check the person's appearance (if in-person) against his/her photo ID.

- A photo ID or copy of a photo ID is always required to help ensure that the person requesting the change is that person.
- DATA Standards must be followed when entering or changing names.

Which office makes the change?

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

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

- If only **Recruiting and/or Admissions** is checked under **Student**, then the appropriate Admissions Office makes the change.
- If only something under **Human Resources** is checked, that office makes the change.
- If only something under **Advancement** is checked, determine why the name change is being requested and route to the appropriate area. We are no longer updating old Alumni records.
- If only something under **Finance** is checked, then Financial Operations makes the change.

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

B. If **General Student** is checked and **nothing** under **Human Resources** is checked, the person must supply a copy of their Social Security card with the new name. Other than students who are also active employees, only the Registrar's Office will change the current name of any student.

- The Registrar's Office must verify the name change/SSN with the Social Security Administration before making any change. This can be done by phone. The new social security card, after this verification, is adequate evidence of a legal name change.

- If a person cannot or will not provide a copy of their new social security card and if <u>anything is checked on GUASYST under</u> **Human Resource**, the Registrar's Office will not make the change.

- If an International Student does NOT have something checked under **Human Resource**, then just a copy of their passport is required (which the Registrar's Office will compare to the contents of their Admissions folder).

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

- If the person is an **active employee**, send the paperwork to HR.ServiceCenter@wichita.edu, and they will make the change. *Human Resources will notify the Registrar's Office if they change the name of an employee who is also a student.*

- If the person is **not an active employee**, the Registrar's Office makes the change.

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

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

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

E. If the 'Current Identification' name type is ALUM, the person most likely only exists under ADVANCEMENT (see GUASYST).

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

General Punctuation

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

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

Diacritical Marks and other punctuation
Never use diacritical marks in the last, first or middle name. If a diacritical mark is found, it should be removed.

Accent acute	é
Accent grave	è
Circumflex	ê
Cedilla	ç
Diaresis or umlaut	ë
Tilde	ñ

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

Comma	,
Double quotation	" "
Parentheses	( )
Percent sign	%
Period	.
Pound sign	#

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

Last Name

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

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

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

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

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

First Name

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

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

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

Examples:

	First Name	Middle Name
R Maureen	R	Maureen
F Robert	F	Robert

Middle Name

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

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

Individual Prefix

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

Code	Description
Capt	Captain
Dean	Dean
Dr	Doctor
Rev	Reverend
Pres	President
Prof	Professor
Sr	Sister

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Code	Description
Fr	Father
Lt	Lieutenant
1Lt	1st Lieutenant
2Lt	2nd Lieutenant
Maj	Major
Ltc	Lieutenant Colonel Commander
Ltg	Lieutenant General
Gen	General
Chf	Chief Commandant
Adm	Admiral

Suffix

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

Code	Description
Jr	Junior
Sr	Senior
II	The Second
III	The Third
IV	The Fourth
V	The Fifth
Ret	Retired Military

Preferred (First) Name (Optional)

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

Name Examples

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

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

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

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

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

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

Section E: Name Standards - Non-Person or Vendor

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

Non-person names will be entered within the Ellucian Banner system on the following forms: Finance-Person Identification FOAIDEN and FTMVEND. Vendors who are people and not employees are entered as vendors who are persons and not as employees. Non-person agencies are entered in FTMAGCY by the Research Office.

General Punctuation

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

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

Comma	,
Double quotation	" "
Parentheses	( )
Percent sign	%
Pound sign	#

Diacritical Marks
Never use diacritical marks in the name of a vendor. If a diacritical mark is found, it should be removed.

Accent acute	é
Accent grave	è
Circumflex	ê
Cedilla	ç
Diaresis or umlaut	ë
Tilde	ñ

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

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

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

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

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

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

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

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

Articles as the First Word in Names

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

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

Abbreviations

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

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

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Government Abbreviations

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

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

Section F: Address Standards

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

Address Types
The address types are in drop down menus within in Banner. **See STVATYP for types.**

Basic Principles
United States postal standards will be used for all addresses. U.S. postal standards are found at https://pe.usps.com/cpim/ftp/pubs/Pub28/pub28.pdf.

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

Which office makes the change?
- Human Resources will change addresses of all current employees; however, employees can change some address types themselves through Self-Service.
- Registrar will change addresses for current and previously enrolled students; students can change some address types themselves through Self-Service.
- Admissions will change addresses for prospective students (no enrollment history).

Address Data Maintenance
Each person who has authority to enter an address should attend a training session on entering addresses conducted by Applications Training.

Addresses are entered in **SPAIDEN** (Student/FA modules), **PPAIDEN** (HR module), **FOAIDEN** (Finance module), **APAIDEN** (Alumni used previously), **FTMVEND** (Accounts Payable) or **FTMAGCY** (Research).

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

If an address is no longer active for a person, it should be inactivated and end dated. **DO NOT REMOVE THE ADDRESS.**

General Guidelines for Addresses

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

System Configuration
In Banner, there are three lines of 75** characters each into which the address information may be entered. The first address line is required. The information on the address lines should NOT include city, state or zip code. Banner provides separate fields for entering these data elements.

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

**For WSU State of Kansas employees, the State System only permits 30 characters in Address line 1 or 2. Please ensure MA Mailing Address type addresses in Banner for employees do not exceed 30 characters.

Street Standards
All information is typed in upper/lower case.

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

Campus Addresses

Use Address type CA to identify a Campus Box.

Line one: Box number. Three characters will be entered such as 015 or 113.
Line two: The building name followed by a comma with RM and the room number is entered. E.g. Morrison Hall, RM 326. The Official name of the building should be use. See List attached to this document.

HR updates campus address by editing the existing address.

Primary Address of Street Number and Name

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

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

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

Unit Designators

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

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

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

Street and P.O. Box

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

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

Three Line Address

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

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

Compass Directions

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

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

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

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Southwest	SW

Street Designators

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

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

County

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

Zip Codes

Zip codes MUST be entered for all United States and Canadian addresses.

United States
Enter the 5-digit zip code. When the 9-digit zip code is available, place a hyphen between the first 5 and last 4 digits. If the zip code is entered, the system will automatically populate the city and state data fields.

Canadian
Enter the six character zip code without hyphens or spaces.

International Postal Code
Enter the international address as supplied to you by the student. Normally, the Postal Code would be entered on the same line as the city.

Nation

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

Military Address – Overseas

Overseas military addresses must contain the APO (Army Post Office) or FPO (Fleet Post Office) designation along with a two-character "state" abbreviation of AE, AP or AA and the zip code.

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

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

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FPO AA 34093-2344

Military Address – Domestic

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

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

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Section G: International Addresses

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

- Try to avoid commas as much as possible.

- Do not abbreviate words that are spelled out.

- With the exception of Canadian addresses, address line 3 should contain the full name of the province or state for a foreign address, if applicable.

- Canadian addresses should use the state/province code field for the province code.

- Use the Nation Validation values to enter nation or country codes.

- If available, the postal code should be entered in the ZIP/postal code field.

Address Examples

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

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

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

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

STR 1:	QinYuanXiLu
STR 2:	LiangLiJiaYuan
STR 3:	
CITY:	Xi'an Shaanxi (*Xi'an is City, Shaanxi is Province*)
STATE/PROV:	*[U.S. and Canadian addresses only]*
POSTAL CODE:	7100000

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NATION:	China

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

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

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Section H: Miscellaneous Standards

Telephone Numbers

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

The following assumptions/rules apply for the use of telephone types:
- Only one telephone number can be designated as the primary telephone for its associated address. However multiple telephone numbers can be associated with a single address type.
- Telephone records can exist that are not associated with any address.

Telephone <u>types</u> are maintained on **STVTELE** (all modules).

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

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

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

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

Telephone Number Maintenance
When adding a telephone number with an address, a record is automatically created on SPATELE with the telephone type that corresponds with the address type. Any further updates to that telephone number done on the address tab of SPAIDEN will automatically update the record on the telephone tab (SPATELE record).

Telephone numbers that are no longer active should be inactivated on SPATELE; not deleted. If a telephone number associated with an address is inactivated on SPATELE, the number will be removed from the connected address once changes are saved.

Employees can update some telephone number types through Self-Service.

Email Address: Type and Preferred Indicator

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

1. For anyone who is a current student, the preferred email address will be the WSUS e-mail address.* For anyone who is a current employee, the preferred email address will be the WSUE e-mail address. A nightly script updates the preferred email indicator every night. If a person is no longer a current student or employee, the nightly script removes the preferred indicator from the WSUS or WSUE E-mail Type record. The nightly script does not set the preferred indicator on another email type. Therefore, the person would not have the preferred indicator set on an email address unless they went into Banner SS and set it themselves.

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

*At this writing, Self Service interface uses the preferred e-mail indicator; thus, it must be set for current students. There should only be one active email address for each email type.

When adding a new email address, if the email type already exists, inactivate the existing type or change the email type to secondary.

Employees can update some email types through Self-Service.

Social Security Number Standards
To make changes to a person's Social Security number, the procedures outlined in the section "Data Change Policy" are followed. Social Security numbers are entered in **SPAIDEN** (Student/FA modules), **PPAIDEN** (HR module), **FOAIDEN** (Finance module), **FTMVEND** (Accounts Payable) or **FTMAGCY** (Research).

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

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

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

*__DO NOT__ ignore an error box that pops up saying someone else has the same social security number as the one you entered. Investigate and find the problem then ask the appropriate office to correct it if needed.

Calendar Dates

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

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

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

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

Biological Information

Deceased Information
Appropriate documentation includes newspaper obituary, death certificate, certain official Web sites such as the Social Security Administration's Death Master File. If the person is a current employee or current student (see SWIGSTU), the name and id should be sent to the appropriate office i.e. HR or Registrar. Information for other than employees and students may be entered by the office that learns about the death. When a person is deceased, the information is indicated on SPAIDEN (Student module), PPAIDEN (HR module), FOAIDEN (Finance module), or APAIDEN (Alumni previously used).

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

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

Gender Designation
Gender designation can be added manually or from the admissions application. Current validation table (GTVGNDR) is populated with the following options:

Code	Description
M	Man
N	Non-Binary/ Gender Nonconforming
T	Transgender
U	Unknown/ Not Provided
W	Woman

Personal Pronoun
Personal pronoun can be added manually or from the admissions application. Current validation table (GTVPPRN) is populated with the following options:

Code	Description
HE	He/Him/His
SHE	She/Her/Hers
THEY	They/Them/Their/Theirs
UNK	Unknown/Not Provided

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

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

Ethnicity
Ethnicity codes are requested from all students and employees. The field is located ~~is~~ in SPAIDEN and the codes are in drop down menus. Ethnicity has four options: Hispanic, Not Hispanic, None or null. If someone chooses not to answer the question, then "None" should be entered.

Race

Race must also be entered, unless the employee or student is Hispanic (then Ethnicity is only required). More than one race can be entered.

Religion
The religion field is not used at WSU.