

Banner Student Information System

Data Entry Standards

Version Control

Version	Date	Author	Change Description
1.0	4/8/2013	Rick Nornholm	Document Template created
2.0	4/11/2013	Teri Eckman	<ul style="list-style-type: none"> Updated references to UCR departments and incorporated decisions made during the Ellucian visit the week of April 1st. Indicated areas that need discussion and review by the Implementation Working Group (IWG).
2.1	5/15/2013	Teri Eckman	<ul style="list-style-type: none"> Updated address type and telephone type based on Engagement 1-2 Day 3 discussions. Areas identified for follow up in the document.
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4.0	4/2/2015	Teri Eckman	<ul style="list-style-type: none"> Updated sections based on decision workbooks and email feedback from Directors. Pending FINAL status when 4 outstanding areas (indicated with comments) have been addressed by Bracken and Asirra.

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Reasons for data entry standards

The effectiveness of a set of standards may be measured in terms of its purpose. It is the purpose of this set of data entry standards to:

- reduce duplicate personal identification records through reliable search for existing records
- promote search capability through uniform data entry, and
- promote reporting efforts based on presentation, retrieval and joins of the data

General Guidelines

Names and addresses in Banner should have a customer-friendly appearance. The objective is to enter names and addresses with mixed case (both upper and lowercase letters) so that when a name or address is printed on correspondence, it looks contemporary and professional.

- Never store the percent symbol (%) in a data field
- Never store the ampersand symbol (&) except in an address or business name
- Enter all data using mixed case and standard capitalization rules.
- Spell out all data unless it is necessary to abbreviate words to fit lines into the appropriate fields. Exceptions are made for items in addresses, such as directionals.
- Enter punctuation in a name only when it is a part of the official name, or for a single character first name, or for an empty first name

Avoiding Duplicate Records

Creating a duplicate record for a person or organization for which a record already exists in Banner can lead to loss of data or incorrect results. It is extremely important to avoid creating duplicate records of this kind.

Before creating a new record for a person or organization, conduct an identification and name search to make sure the person or organization has not already been entered into the Banner system. Search for a person using social security number, birth date, and all current and previous names, and also do a “soundex” search. Then verify that the correct record has been found by checking the birth date and address. Only if no record is found should you add a new record.

Example: To find Mac Donald, you must account for McDonald, Mc Donald, MacDonald, and Mac Donald. A search on M%D% will retrieve all of these records.

Data Integrity across Multiple Modules

A common institutional database offers the potential for better service and convenience to our constituents and greater accuracy across UCR. Simultaneously, each administrative position must be cognizant of data integrity requirements of other Institutional departments in its practices. Name change practices are a key example where specific policies must be followed depending on the type of record. Whenever a constituent requests a name change it is necessary to determine (using GUASYST) in which modules the record occurs. The uniform name change policies are outlined below.

Searching for Multiple Records

A complete search must be done before entering a new person or non-person in Banner. There should only be one record for each entity. Any entities that are in Banner more than once must go through the “multiple PIDM” process.

Common Search forms include:

- SOIADEN – General Person search
- SOACOMP – Non-person search
- GUIALTI – SSN/SIN Alternate ID search
- ROAIDEN – Person Name/ID Search
- ROIASIQ – Applicant Status Inquiry

How to do a complete search

Search on any portion of the name or ID that is known. Remember that names in Banner are case sensitive.

- Use the “soundex” feature if you are not sure of the spelling
- Use a wildcard (% or _)
- This precaution may take a few minutes to perform, whereas fixing a multiple PIDM may take several weeks to complete.

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Multiple PIDs Management

On a monthly or quarterly basis or on request (e.g., prior to rolling classes into academic history), Student Affairs Information Systems (SAIS) staff will initiate an audit of general person and general student records, to search for duplicate records. The results will identify the modules in which possible duplicate records exist (e.g., Location Management, Recruiting, Admissions, Academic History, Billing, Payroll, etc.). Based on the results of the audit, SAIS staff will inform the concerned offices, who may meet with the purpose of resolving the problem, by following the necessary procedure(s) to combine the duplicates into one record for the student or person.

An audit report of name changes will be run monthly by SAIS and Student Business Services to reconcile name change activity and documentation. If a name change has been made that requires additional documentation, it is the concerned department's responsibility to follow up with the department implementing the change and/or the person whose name has been changed, as appropriate.

Creation of New Person or Non-Person Record

Person and non-person records are created the first time someone enters them in Banner. The following offices have the ability to create a new student or general person or non-person record.

Office	Type of Entity
Accounting	Vendor (Non-Person), person
Financial Aid	Financial Aid Prospect, Financial Aid non-person
Graduate Admissions	Student
Office of the Registrar	Student, non-person
School of Medicine	Student
Student Business Services	Third Party Vender, non-person
Summer Sessions	Student
Undergraduate Admission	Prospective, Admitted Student

Names

Name Change Policies

Informed professional judgment (i.e. common sense), must be used to determine what constitutes a name correction (i.e. data entry spelling error) rather than a name change. In a name correction, the current name should be “typed-over”. No previous or alternative name record is kept and no documentation is required. However, documentation to correct an error may be required in some circumstances.

Use the System Identification Form (GUASYST) to determine the department that ‘owns’ the record.

The following chart summarizes policies and procedures for making name changes for person and non-person entities in Banner.

Person/Non-Person	Procedures
Current or Past Student	Registrar will make the change. See the Change or Correct Name Form located here: http://registrar.ucr.edu/Content/pdfs/change_or_correct_name.pdf
Human Resources Requests	Registrar will verify SSN from HR or others on campus responsible for hiring. A copy of the card may be required to verify.
Admission recruit or applicant, not a current student or employee.	Undergraduate Admissions will make the change. See Change or Correct Name form located here: http://registrar.ucr.edu/Content/pdfs/change_or_correct_name.pdf
Vendor or Third Party	Student Business Services will change upon request of individual or company.

Name Standards for Adding a New Record

Enter the last, first and middle names of the person. The person's legal name is as it appears on a court order, social security card, marriage license, or passport. If legal documentation is not available when the person record is created, enter the full name, including the full middle name. Do not change a full name to an initial. Always use mixed case letters for names.

The entry of the Social Security Number (SSN), Date of Birth, Gender and Address is not mandatory. However, these fields are used during the Common Matching process and entry of this data will greatly reduce the possibility of multiple PIDM records in Banner. Furthermore, the SSN and Date of Birth are used extensively in Financial Aid.

Case

If the person has submitted paperwork with their name written in all upper-case letters, enter the name with mixed case letters. If the person's name starts with a lower-case letter, enter the first letter in lower case (duBois, for example). When in doubt of the correct format to enter, request legal documentation from the person.

Initials

Do not use an initial for the first name unless the name appears as such on legal name documentation. Do not enter periods in a name unless the person indicates that they are required or in the following circumstances: in an empty first or last name field. When in doubt of the correct format to enter, request legal documentation from the person.

Spaces

Spaces are permitted if the legal spelling and format of the name includes spaces. When in doubt of the correct format to enter, request legal documentation from the person.

Examples:

L Christine Johnson
Mc Donald Van Husen
McDonald De La Rosa
Mac Pherson De La Rosa
St John Van der Linden
Cooper-Smith Anderson

Punctuation

- Use hyphens, apostrophes, dashes or periods exactly as the person indicates in writing or on the legal documentation.
- Use hyphens to separate double names (sometimes used in ethnic names or by persons who wish to use their maiden and married names), when indicated by the person that a hyphen is part of the legal spelling of their name.
- Use apostrophes (') when the symbol is part of the proper, legal name or address, (e.g., O'Leary, O'Connor, Sam's Wholesale Club)
- Never use commas, pound signs (#), or ampersands (&) in a name.

Do not add punctuation where there is none. When in doubt of the correct format to enter, request legal documentation from the person. In the following examples, any could be correct:

Examples:

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

Previous Names

With the exception of corrections made due to data entry errors, it is our policy to maintain previous names used while at the University in Banner. Forms used by some offices may ask for a person's previous name or names (for example, admission applicants). Enter the earliest name first. Previous name will appear in the previous identification block.

Example:

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Name:	Lee Livingstone
Previous Name:	Lee Stanley
Enter previous name	'Lee Stanley' and save.
Enter current name	'Lee Livingstone' and save.

Last Name

The Last Name is a required field. When in doubt of the correct last name format, request legal documentation from the person.

- Enter the legal spelling and format of the last name, using standard capitalization rules.
- Do not enter titles, prefixes (Dr, Mr, Mrs) or suffixes (III, Jr) in this field; this information is stored in the prefix and suffix fields.

First Name

The First Name is a required field. When in doubt of the correct first name format, request legal documentation from the person.

- Enter the legal spelling and format of the first name, using standard capitalization rules. If there is no first name, enter a period (.) to satisfy the required field.
- Spaces and hyphens may be included in double first names (e.g., Mary Ann, Bobbie Jo). Enter both names in the first name field only if it is legally a two-name first name.
- If the person prefers to be addressed using both first and middle names, but these are not the legal names, use the preferred first name field to enter this information.
- Do not include titles, prefixes or suffixes in either the first name or preferred first name fields. This information is stored in the prefix and suffix fields.

Preferred First Name

If a preferred name exists, enter this name (also known as a nickname) in the Preferred First Name field. This is an optional field.

Examples:

William Knight prefers to use the name 'Bill'. Enter 'Bill' in the Preferred First Name field.

D Mark Wilson prefers to use middle name 'Mark'. Enter 'Mark' in the Preferred First Name field.

Alexander James Jones prefers to use the initials 'AJ'. Enter 'AJ' in the Preferred First Name field.

Mary Ellen Smith prefers to use her first and middle name. Enter 'Mary Ellen' in the Preferred First Name field.

Middle Name

The middle name is not a required field

- Enter the legal spelling and format of the middle name in mixed case using standard capitalization rules or the capitalized middle initial.
- If the middle initial is used, it should not be followed by a period.
- If there is no middle name, leave the field blank.

Prefixes and Suffixes

Do not enter prefixes and suffixes (such as Mr, Ms, Rev, Jr, IV, or Esq) in the name fields of the current identification block on the Banner IDEN forms. Enter prefixes and suffixes in the respectively named fields on the General Person forms. In general, UCR does not enter prefixes or suffixes when entering new person records but they may be loaded during a batch process.

Name Prefixes

- Enter the name prefixes given by the person. **If no prefixes are provided, do not enter any.**
- Enter the prefix to be associated with the person's name using mixed case and standard capitalization rules.

Mr.
Mrs.
Ms.
Miss
Dr.
Rev.
Brig. General
Cmdr.
Col.
Capt.
Father
Honorable
Judge
Lt.
Lt. Col.
Maj.
Rabbi
Sgt.
Sister
Bishop

Name Suffixes

- Enter name suffixes given by the person. **If no suffixes are provided, do not enter any.**
- Enter the suffix code to be associated with the person's name using mixed case and standard capitalization rules.
- The suffix may be up to 20 characters in Banner and multiple suffixes may be entered.
- Separate multiple suffixes with commas.

Jr.
Sr.
Ph.D.
II
III
IV
V
VI

Name Type and Description

The “current” name in Banner does not require a type to be identified. In other words, if there is only one name, it is current and the type can be left blank. If a designation other than current is needed, here are examples of name descriptions to be used:

ADVN	Advancement Name
ALIA	Alias Name
ALUM	Alumni ID
BRTH	Birth Name
EVNT	Event Guest
FORM	Former Name
GRAD	Name at time of Graduation
LEGL	Legal / Official Name
MAID	Maiden Name
PROF	Professional/Stage Name
SPSE	Spouse (with no record) Name

Non-Person Name

All information is typed in mixed case format. If an “article” (a, an, or the) is used as an adjective in the full legal name of a non-person entry, it should be included when entering the name in Banner.

Example:

The Boeing Company
Kansas Independent College Fund
New York State Department of Education
United States Postal Service

- Non-person records should be entered on SPAIDEN/PPAIDEN in the Non-Person Field.
- Though not related to the “name” field, after creation of a new Non-Person Account, and the system assigns a new ID, Non-Student accounts will replace the first digit of their ID with a ‘C’ or ‘N’. Third Party Contract Providers will receive a ‘C’ for ‘Contracts’, while regular Non-Student accounts will receive an ‘N’ for ‘Non-Student’.
- Punctuation in the name and address of a company should be entered only when it is part of the official name.
- Determine spacing by using the vendor's invoice or other company documents as a guide. Generally, acronyms do not have spaces between the letters, e.g., FOCUS, IBM, AES of Roanoke Inc.
- Include spaces between initials and the company name, e.g., A B Dick Products Inc or E C Geiger Inc.
- If the official name includes a numeral such as 47th Street Photo, enter the numeral rather than spelling the number out.

Abbreviations in Company Name

In general, company names should not be abbreviated unless the company has done so, such as IBM. If space limitations require that a name be abbreviated, abbreviate the latter part of the name rather than the former.

Before adding a new company to Banner

It is important that SOAIDEN and SOACOMP be searched thoroughly to ensure that the company does not already exist in the vendor or other non-person files. If a company already exists, use the appropriate maintenance form to activate in the applicable module. If required, add an additional address type and address particular to the module.

Only one company record and company identifier, with multiple addresses and types as required, should exist for each business unit. Where large corporations operate under different business units with independent tax identification numbers, only then should the business units be established as separate entities with separate identifiers.

UCR is on Direct Loans and our Private Loans are processed via ELM so we are not currently populating Lender/Guarantor names in Banner.

For example:

- All area Wal-Mart stores, K-Mart stores, etc. would be a single company with one identifier and multiple business addresses.
- Nationally affiliated moving companies, such as North American Van Lines, would be a single company with one identifier and multiple addresses containing the name of the individual agent, because these are all centrally billed under the parent company.
- General Electric Aerospace, General Electric Medical Systems, and General Electric Credit Corporation would all be separate companies with separate identifiers since they operate as separate business units even though they are the same parent corporation.

Addresses

General

Institution-wide conventions are critical for shared data such as addresses; we should be mindful of the purposes for which the data are entered. For example, departments with marketing responsibility must be able to produce individualized correspondence conforming to formal addressing rules. Departments such as Student Business Services and Accounting may have less stringent formatting requirements. These standards must balance three considerations:

Banner system requirements:

- US Addresses - Street line 1, City, State, and Zip Code
- International Addresses – Street line 1, City, and Nation

Accepted standards for formal communications:

- U.S. Postal Service guidelines

All addresses must meet U.S. Postal Service addressing requirements. The guidelines expressed herein are designed to convey the minimum standard requirements to be used throughout UCR.

Address Types

The following address types are available for use based on the Address Type Code Validation (STVATYP) form. The delivered address types should be reviewed and a determination of the following should be made.

Hierarchy used in mailings	Updated in Self-Service	Banner Address Type	Description
4	N	BI	Billing
--	N	BU	Business (vendors)
5	N	FA	Financial Aid
2	Y	MA	Local mailing address
--	n/a	PA	Parents
3	Y	PR	Permanent
1	N	RH	Residence Hall
--	N	SV	SEVIS
--	n/a	XX	Reserved for TGRFEED Use Only

It is our desire to maintain a standardized list of address types based on their purposes, rather than separate addresses for each department as this will reduce redundant data entry. Thus, an individual may appear in accounting, be an alumnus, employee and a current student, and only have a single address.

Each Banner application (e.g., recruitment mail, billing, grades, and award letters will look for a valid address in a prescribed sequence. For example, the grade mailing routine might look for addresses in this order: MA and then PR. Admission might typically search for a mailing address in this order: PR and then MA. Student Business Services may employ a different hierarchy depending on need.

Identical addresses should not be keyed in as different address types.

The address types and descriptions as approved are listed below. Note that the use made of a particular address type is really part of its definition.

BI – Billing

Student Business Services uses this address type for some Non-Student Accounts and other student accounts converted from legacy systems.

BU - Business

The Business address (non-person) is the address to which purchase orders and other business correspondence is directed, and generally reflects the physical location of the vendor. This is the primary address type for storing vendor addresses in Banner, and all entities established in Banner initially as a vendor should have a BU address. Multiple business addresses may be stored for each vendor, using sequence numbers in conjunction with the BU (business address) designator.

FA – Financial Aid

This is the address that comes in on the FAFSA.

MA – Local mailing address

The current address is the address to be used if it is different from the PR address type. The current address is often used when the person resides in the local area during the school year and elsewhere during the summer.

RH – Residence Hall

This is the address used for residence hall addresses. An end date should be associated with this address type based on the housing contract.

PR – Permanent

The permanent address is the address that changes rarely for a person. In the case of a student, this may be a post office box or a parent address.

PA – Parent

Parent Address is the address of the parent(s) when **not** the same as the PR address type.

SV – SEVIS

This is the address used for SEVIS.

XX – Reserved for TGRFEED Use Only

The address type reserved for Finance operations only.

US Street Standards

All information is typed in mixed case format (e.g., not all uppercase or all lowercase). Street names should be spelled out in their entirety whenever possible.

Note that the post office reads an address from the bottom up. Thus, the most general information (country, state or province) is at the bottom of the address, while the most specific (apartment or room number) is at the top.

Punctuation & Symbols

- Punctuation (periods, commas and apostrophes) should not be used. Symbols should never be used in the first position of an address field.
- The percent symbol "%" should never be used.
- The designation for "in care of" should be abbreviated as "c/o" when necessary and should be entered on the first street address line.
- Although USPS standards prefer uppercase letters for the presentation of all lines of the address block, address data should be entered in mixed case using standard capitalization rules.
- Use hyphens and slashes in addresses when needed for clarity or designated fractions.

Example:

Mid-Island Plaza
101 1/2 Main St

- Use the Ampersand '&' instead of the word 'and' only if that is the proper spelling or if it is used on individual or business letterhead.

Example:

1500 King & Queen Way

The standard layout for the Delivery Line is:

primary address number	numerical, not word
predilection	N (North), E (East), SW (Southwest)
street name	normally not abbreviated
suffix	St, Dr, Cir
postdirectional	N (North), E (East), SW (Southwest)
secondary address identifier	Apt, Rm, Ste
secondary number	numerical, not word

The USPS prefers use of pre-direction and post-direction abbreviations without a period. These describe the geographic direction before and after the street name. Directionals should be spelled out only when they are part of the street name.

Example:

1501 Southwest Freeway
101 West St
202 County Road NE
303 Bay West Dr
500 Bay Drive W

The preferred delivery line for Rural Route designations is RR.

Example:

RR 2 Box 18

Compass Directions

If appropriate, compass directional words may be abbreviated at the beginning and/or end of the street name.

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

Abbreviations for Street Designators

Refer to the U.S. Postal Service Address Standards publication for abbreviations of designators not listed below. Abbreviations for Street Designators are defined by the USPS.

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

Address Unit Designators

Secondary designators, such as suite or apartment numbers, should be on the same line as the street address and at the end to the right.

Example:

1356 S Executive Dr Ste 202
1624 W Donner St Apt 101
102 Main St Rm101

If the primary address uses all available characters, the secondary unit designator should be on the first address line – preceding the primary address. The unit designator should never be on the line following the primary address. Remember, the post office reads an address from the bottom up.

Example:

Mr. Michael Murray
Apt C
5800 Springfield Gardens Cir
Springfield VA 22152-1058

Always use the USPS standard abbreviations for secondary unit designators as follows:

<u>Secondary Unit Designator</u>	<u>Approved Abbreviation</u>
Apartment	Apt
Basement	Bsmt *
Building	Bldg
Department	Dept
Floor	Fl
Front	Frnt *
Hangar	Hngr
Lobby	Lbby *
Lot	Lot
Lower	Lowr *
Office	Ofc *
Penthouse	Ph *
Pier	Pier
Rear	Rear *
Room	Rm
Side	Side *
Slip	Slip
Space	Spc
Stop	Stop
Suite	Ste
Trailer	Trlr
Unit	Unit
Upper	Uppr *

* Does not require secondary range number to follow

Attention Line

If possible, avoid using an attention or “care of” line. Reorganizations or turnover can make them obsolete quickly. The designation for “in care of” should be abbreviated as “c/o” when necessary and should be entered on the first street address line.

If an attention line is necessary, try to use only an office or title rather than a name. Thus, “Attention: Treasurer” is preferable to “Attention: Joseph Deters, Treasurer” because the former does not become obsolete when a new treasurer is elected.

If an attention line is necessary, enter the address as provided by the company or organization.

PO Box

- Always abbreviate Post Office Box as PO Box
- Change “Caller”, “Lockbox” and “Drawer” to PO Box.
- Dual Addresses
 - Banner address formats allow three lines of street address information. If a mailing file contains both a physical address (street number and name) and delivery address (PO Box), place the PO Box immediately above the last line.
 - Do not enter data into the second address line until data has been entered into the first address line.

Example:

Mr. John Doe
1201 Broad St
PO Box 1001
Falls Church VA 22042-2102

Sources for Additional Information

There are style manuals that deal with formal addressing style. There are several U.S. Postal Service publications dealing with addressing. The most comprehensive and accessible publication is Postal Addressing Standards, Publication 28. This publication is available from the U.S. Postal Service as well as in a portable document format (PDF) on the World Wide Web at:

<http://pe.usps.gov/cpim/ftp/pubs/pub28/pub28.pdf>

The U.S. Postal Service National Customer Support Center has a very useful web site that provides extensive address and zip code information:

<http://www.usps.gov/ncsc/>

The Canadian Postal service (Canada Post) also offers a very useful web site:

<http://www.canadapost.ca/personal/tools/pg/manual/PGaddress-e.asp>

City

- All information is typed in mixed case format, (i.e. not all caps or all lower). Spell out city names in their entirety. If it is necessary to abbreviate city names to fit within 20 characters, use abbreviation standards described herein or in the US Postal Service Postal Addressing Standards (System generated from zip code entry).
- State and Province
 - State codes MUST be entered for all U.S. and Canadian addresses. The appropriate code may be selected using Banner software. For additional information, refer to the Postal Service Address Standards publication. The State and Province values are validated based on the State/Province Code Validation (STVSTAT) form.

Canadian Provinces are entered in the State/Province field, NOT in the City field. Canadian Provinces include Alberta, British Columbia, Manitoba, New Brunswick, Newfoundland, Northwest Territories, Nova Scotia, Ontario, Prince Edward Island, Quebec, Saskatchewan, and Yukon and have their own code for entry into the State Field.

Note: Canadian addresses must include the city in the City Field and the Province in the State Field. (System generated from zip code entry).

County

The County will be system generated from the zip code entry. Do not enter county code for international addresses.

Zip or Postal Code

Zip or postal codes MUST be entered for all U.S. and Canadian addresses. For all US addresses, enter the five-digit zip code before entering the city, county, or state. If the zip code is entered correctly the city, county, and state are automatically displayed in the appropriate fields. This not only eliminates the need to key this information, but also ensures that it is correct. Note that you must enter the five-digit zip code only, then press the ENTER key (or the TAB key), which will cause Banner to fill in the city, county, and state. You can then return to the zip code to add the remaining digits.

United States

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

Example:

97203

97203-5798

Canadian

Enter the six-character postal code by keying in 3 characters, a space, and the last 3 characters.

Examples:

T2T 2Y5

R2L 1N4

Country

A country code is required for all non-U.S. addresses. Do not enter "United States" in the country name field for United States addresses. Banner maintains a list of all the current code options available and the default country designation is "US"

International Addresses

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

- Use the Nation validation values to enter nation or country codes. This way UCR can better control the printing of international addresses on letters and forms.
- International information is typed in mixed case format, (e.g., not all caps or all lower).
- Enter city name, province or state and postal code. It may not always be possible to enter city, province/state and postal code in the 20-characters of the city field. This field is required and the individual must use best judgment in how to employ the City field and address lines to best replicate the international address.
- Spell out names in their entirety. If it is necessary to abbreviate city names to fit within 20 characters, use abbreviation standards.
- Enter street address information in the 3 street address lines and enter the city and province (or equivalent) in the city field. (For Canadian addresses, enter the province in the state/prov field.) Finally, enter the postal code (if any) in the ZIP code field.

Example:

Street address	Petko Metodiev Kitanov POB 140
City	Balgoevgrad, Hyderabad
ZIP Code	2700
Nation	BU

Military Address

Overseas Locations

- Enter the APO or FPO code into the City field.
- Enter the military 'state' code (AA, AE, or AP) into the State field.
 - AA for units in the Americas - other than CANADA
 - AE for mail going to Europe, the Middle East, Africa, and Canada
 - AP for mail destined to the Pacific

Examples:

SSGT Dennis Becker
Unit 2050 Box 4190
APO AP 96522-1215

Sgt Cher Downey
PSC 802 Box 2625
APO AE 09777-0010

Seaman Duane Reeves
B Division
USS North Dakota
FPO AA 34093-2344

Domestic Locations

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

Example:

Col Margaret Henry
Lowery Air Force Base
8205 E Sixth Ave Apt 405
Denver CO 80234

Address Source

The following table describes address source codes defined for the Banner system.

CONV	Information From Conversion
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Adding a New Address Type

The following guidelines should be observed if a new address type should be needed. Only the following departments can add and/or change an address type:

Student	Student Business Services Student Affairs Information Systems
Non-Person (Vendors)	Accounting Student Business Services

Telephone Numbers

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. Enter the ten-digit number without inserting a hyphen.

Telephone numbers may be tied or linked to a specific address. The 'Address Type' and 'Seq No' fields are used to link the telephone number to a specific address. It is possible to have more than one telephone number for a single address.

Telephone Numbers

All regional and local telephone numbers, including on-campus phone numbers, need to be entered using the ten-digit format. Enter all three parts in the appropriate field, using no parentheses or hyphens. Do NOT enter the standard "1" code for long distance dialing.

Example:

3162955000

International Numbers

There is a 16 character limit in the international phone number field. Enter all three parts in the appropriate international phone number field, using no parentheses or hyphens. Do NOT enter the "011" standard code for international dialing.

Example:

81037599311 The number would be entered for a telephone number in Japan consisting of 81 for the country code, 03 for the city code and 7599311 for the phone number.

Phone Number 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
1764

All regional and local telephone numbers, including on-campus phone numbers, need to be entered using the ten-digit format.

Telephone Types

A telephone type distinguishes each telephone number entered in the Banner system. UCR uses the following codes:

BC	Business (contact)
BU	Business (vendor main line)
CL	Cell/Mobile
MA	Local
PA	Parent
PR	Permanent
RH	Residence Hall

Multiple phone numbers may be stored for each mailing type, using sequence numbers.

Other Person Data

Calendar Dates

Dates are entered on a variety of screens for various purposes. UCR prints dates in the format dd-mmm-yyyy. Dates may be entered in any format. The system will re-display the date in the dd-mmm-yyyy format.

Examples:

Date Entered As	Date Displayed
January 17, 1999	17-JAN-1999
4/17/99	17-APR-1999
060899	08-JUN-1999
06	06-current month-current year
0602	06-FEB-current year

Confidential Records FERPA

Confidential Information Indicator

The following information has been designated as public information by UCR. This information, in accordance with FERPA, may be released to any person who requests it unless the student has specifically requested that it be restricted.

- Local Address
- Permanent Address
- Telephone Number
- Place of Birth
- Date of Birth
- Email Address
- Dates of Attendance
- Previous Schools Attended
- Degrees Awarded
- Major
- Honors
- Participation in official recognized activities or sports
- Height and weight of athletes

In order to request that the above information be restricted, students must go to self-service under Personal Information and then Privacy and check any or all boxes next to the information that they would like to be withheld from the public. When these boxes are checked, the information about the student may not be released to any third party (outside of UCR school officials). For example, we would be unable to verify a degree to a prospective employer, print a name in a brochure, or provide information about the student to a hometown newspaper.

Staff will view the selections by the student by going to GOADPRF. The items that the student has restricted will have a check mark. This is a repurposing of this form, so the header "Display in Directory" information does not fully reflect what the check mark is.

Once a student restricts one item of directory information, the Confidential box is automatically checked.

Students can grant permission to release restricted public information or private information contained within the educational record to a third party by going to self-service under Proxy Access. Students can establish a PIN for any person that they wish to access their information. You can choose what information that individual has access to and can also grant them permission to call Student Business Services, Financial Aid, or Housing to discuss your account. Students are responsible for granting and removing access to their account.

This confidentiality does not apply internally where information is needed for business purposes.

Disclosure of Student Information

<http://registrar.ucr.edu/ferpa/Pages/FERPA+Policies.aspx>

FERPA Statement

<http://registrar.ucr.edu/ferpa/Pages/FERPA+Policies.aspx>

Date of Birth

Changes to Date of Birth

When a birth date is required, but none is available, uses the holder code date 07-JUL-1864 to allow processing an employee. Periodically, records containing this date will be identified and corrected. When the year of birth is known, but not the specific month or day, will use the code 01-JAN-60, where "60" is the year of birth and will vary with the constituent, to associate a birth date with constituent's record.

Student	Student Business Services Undergraduate Admissions Registrar's Office Financial Aid
Non-Person (Vendors)	Accounting Student Business Services

Deceased Information

- Due to the sensitivity of this issue, prompt attention is important so future mailings are discontinued. Deceased status must be verified information, not just perceived information.
- For Applicants, Undergraduate Admissions or the Graduate Division will enter/change deceased information.
- For Students, only the Registrar's Office will enter/change deceased information.

Driver's License Information

UCR will not maintain driver's license data. Financial Aid will collect but not maintain this information. However, it is not maintained on a commonly accessible form.

Email

All email addresses entered should be evaluated for case sensitivity and spelling. Email addresses consist of a name/word followed by the @ sign, followed by the domain name (@gmail.com @yahoo.com, @ucr.edu, @student.ucr.edu). A domain name contains between two and four elements separated by periods.

Email Address Types:

BUC	Business (contact) Used for vendor contact
BUS	Business (vendor) Used for vendor / company
FIN	Financial Aid Used for email provided on FAFSA
PAR	Parent Used for parent
PERS	Personal email Self-supplied personal email address
UCR	This is the email address type that will be used for all official UCR communications to students. Students, faculty and staff at UCR are eligible to receive internet access and email services. Use of these privileges requires establishing an account with Computing and Communications. Students are assigned email addresses at the time of submitting their intent to register.

The UCR email address should be marked as the preferred email address. If email is stored, then the preferred indicator must be checked to indicate the preferred email address. If the preferred indicator is not checked then the email address may be omitted from selection.

Examples:

helpdesk@ucr.edu
alumni@ucr.edu

Ethnicity Code

UCR collects and reports on race/ethnicity data following IPEDS standards.

Race/ethnicity definitions (<https://nces.ed.gov/ipeds/reic/definitions.asp>)

Categories developed in 1997 by the Office of Management and Budget (OMB) that are used to describe groups to which individuals belong, identify with, or belong in the eyes of the community. The categories do not denote scientific definitions of anthropological origins. The designations are used to categorize U.S. citizens, resident aliens, and other eligible non-citizens. Individuals are asked to first designate ethnicity as:

- Hispanic or Latino or
- Not Hispanic or Latino

Second, individuals are asked to indicate one or more races that apply among the following:

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White

Hispanic or Latino

A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race.

American Indian or Alaska Native

A person having origins in any of the original peoples of North and South America (including Central America) who maintains cultural identification through tribal affiliation or community attachment.

Asian

A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian Subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.

Black or African American

A person having origins in any of the black racial groups of Africa.

Native Hawaiian or Other Pacific Islander

A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

White

A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.

Nonresident alien

A person who is not a citizen or national of the United States and who is in this country on a visa or temporary basis and does not have the right to remain indefinitely. Note: Nonresident aliens are to be reported separately in the places provided, rather than in any of the racial/ethnic categories described above.

Resident alien (and other eligible non-citizens)

A person who is not a citizen or national of the United States but who has been admitted as a legal immigrant for the purpose of obtaining permanent resident alien status (and who holds either an alien registration card (Form I-551 or I-151), a Temporary Resident Card (Form I-688), or an Arrival-Departure Record (Form I-94) with a notation that conveys legal immigrant status such as Section 207 Refugee, Section 208 Asylee, Conditional Entrant Parolee or Cuban-Haitian). Note: Resident aliens are to be reported in the appropriate racial/ethnic categories along with United States citizens.

Race/ethnicity unknown

The category used to report students or employees whose race and ethnicity are not known.

Race/ethnicity will be reported as:

- 1) Nonresident Alien
 - 2) Race and Ethnicity unknown
 - 3) Hispanics of any race
- For non-Hispanics only:
- 4) American Indian or Alaska Native
 - 5) Asian
 - 6) Black or African American
 - 7) Native Hawaiian or Other Pacific Islander
 - 8) White
 - 9) Two or more races

Data/reports that require identifying all records of a certain race/ethnicity can be retrieved; however, it will differ from official campus reporting which reports race/ethnicity. Example: If a student was Cuban and African American, they would be counted as "Hispanics of any race" in official campus reporting.

While we do not report the race/ethnicity for Non-Resident Aliens, we may have race/ethnicity data that has been provided on the UC Undergraduate Application or Graduate Application.

Every attempt should be made to collect race/ethnicity data for any records being manually entered into Banner.

Gender

The U.S. Department of Education requires that UCR reports gender information.

Male	A male person, man or boy
Female	A female person, woman or girl
Not Available	The gender information is not available or if the gender cannot be determined by the name, e.g., Chris, Pat, Terry, etc.

Legacy Code

UCR will not collect and/or maintain his data.

Marital Code

UCR will not collect and/or maintain marital data.

Religion Code

UCR will not collect and/or maintain religion data.

Social Security Number

- Enter the entire (nine) 9-digit number, omitting dashes and spaces between numbers (e.g. 555491133).
- Changes to Social Security Number
 - A person making a social security number change request must present a new social security number card. Good professional judgment should be used when making error corrections to Social Security Numbers. The following guidelines should be observed if a change must be made to the Social Security Number.

Student	Student Business Services Undergraduate Admissions Registrar's Office Financial Aid
Non-Person (Vendors)	Student Business Services Accounting

U.S. Citizen Type

This field may be left blank to indicate the U.S. citizenship is not known.

Veteran File Number

Student Special Services keeps and maintains this information for students.