

SAINT LOUIS UNIVERSITY

DATA STANDARDS MANUAL

PUBLISHED ON **October 1, 2003** AS VERSION **1.0**

REVISED October, 2004 AS VERSION 1.1

REVISED December, 2005 AS Version 1.2

Revised June, 2006 as Version 1.3

SUBSEQUENT VERSIONS TO BE PUBLISHED AS VERSION **1.x**

NOTE: Any changes recommended for the data standards in use at Saint Louis University must be approved by the Data Integrity Committee which consists of representatives from all Banner application areas. Approved changes will be reflected in subsequent versions of this manual.

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1 General Information

1.1 Purpose

These guidelines establish measures for the protection, access, and use of the Saint Louis University Banner system and equipment. In this document, references to information systems or electronic data, unless otherwise specified, refer to the Banner product, its integrated software components, and the databases that store information entered through and retrieved by these systems. They also define the responsibilities of those that access and manage the data and equipment. Offices may have individual guidelines that supplement, but do not supplant or contradict this statement. Data entrusted to the University by other organizations (e.g., foundations and government agencies) is governed by terms and conditions agreed upon with those organizations. Specific issues not governed by such agreed terms shall be governed by the guidelines set forth in this document.

Banner is modular, meaning that there are modules for different functional areas. There is a Financial Aid module, a Finance module, a Human Resources module, an Alumni/Advancement module and a Student module. There also is a General module that ties all of the functional modules together. A person's ID number, name, address, etc. is contained within the General module and is shared by the other modules.

Banner is a collection of forms with imbedded instructions used to enter data, modify data, delete data, and query data. Banner simply provides the forms and programs necessary to manipulate data. The data itself is stored in tables residing in an Oracle database. It is a relational database, meaning that tables are linked together by means of some internal identification number and, therefore, data redundancy is limited. One table might have a student's ID number and the course numbers in which he/she is enrolled. A separate table has the course numbers and the course descriptions. The course numbers would link the two tables together providing a course description for the courses in which a student is enrolled. There are over 3,800 tables in the Banner system.

This manual prescribes a process for creating and maintaining General Person information in the Oracle database, using Banner. A Banner Navigation session must be completed prior to General Person training.

1.2 Scope of this Manual

This manual is constructed to ensure that General Person information is maintained as accurately and completely as possible, and that no duplications of data occur within the database.

Data Stewards and owner offices are responsible for training of inquiry and maintenance within their respective modules, in cooperation with Information Technology Services (ITS).

Owner office for the **Alumni/Advancement** System

- Alumni/Advancement Office

Owner office for the **Finance** System

- Office of the Controller

Owner office for the **Financial Aid** System

- Financial Aid Office

Owner offices for the **Student** System

- The Admitting Offices
- The University Registrar
- Student Financial Services

Owner offices for the **Human Resources** System

- Human Resources Office
- Payroll Services

Security or access levels for each individual employee are determined by owner offices and each user must complete training before access is granted. (Also see Section 1.7, System Managers)

1.3 Administrative Responsibility

By law, certain electronic institutional data is confidential and may not be released without proper authorization. Employees should adhere to all applicable federal and state laws, and University policies concerning storage, retention, use, release, and destruction of data.

All levels of management shall ensure that, for their areas of accountability, each information system user knows his/her responsibilities. Each system user shall read and understand this statement before accessing the system.

Electronic data is owned by the University and is a vital University asset. All institutional data, whether maintained in the central database or copied into other data systems, including microcomputers, remains the property of Saint Louis University. Access to data is not approved for use outside an individual's official University responsibility.

Electronic, institutional data shall be used only for the legitimate business of Saint Louis University. Administrative computing services and facilities shall be used only as required in the performance of job functions.

Supervising administrators shall ensure a secure office environment with regard to all institutional information systems. Administrators shall validate the access requirements of their staff according to job functions, before submitting requests for the provision of access.

Under no circumstances shall anyone use institutional electronic data (in detail or summary) in any publication, seminar, or professional presentation, or otherwise release data, in any form, outside the University without prior written approval from the appropriate Data Steward. Data should never be left on any system to which access is not controlled. The Office of Planning and Decision Resources is a prime example of an office that requires regular access to data to do a significant amount of reporting both internally and externally on behalf of the University. Once initial access is established, there would be no additional requirement to request or justify access to data, nor to request approval for reports completed and distributed.

All system users must not leave their workstations unlocked or accessible while logged into Banner. All users must log out at the end of the day.

As a general principle of access, University data (regardless of who collects or maintains it) shall be shared among those employees whose work can be done more effectively by knowledge of such information. Although the University must protect the security and confidentiality of data, the procedures to allow access to data must not unduly interfere with the efficient conduct of University business.

1.4 General Person Form Access

General Person access is awarded only after appropriate training is received. Entries to Banner general entity tables (person or non-person) affect the overall integrity of the database used by all Banner systems.

Failure to abide by the guidelines outlined in this manual for creating and maintaining general entity records may result in removal of access and a subsequent reassignment of duties. The following job description segment has been developed for all individuals with General Person access:

Purpose: Ensure database integrity and the goals of easy, professional, cost-effective communication for the University community and its contacts by:

- avoiding creation of duplicate records for a single entity by utilizing the Saint Louis University Data Standards document
- providing complete name/address information in a timely manner, with an audit trail of changes
- using Saint Louis University data entry standards to facilitate consistent reports and searches
- sharing effective processing discoveries and problem-resolution tasks with other team members
- directly taking advantage of interpersonal networking, database capabilities and workflow analysis outlines.

Each owner office has an individual who participates in the Data Integrity Committee to ensure current issues are continually addressed. These representatives also have a job description segment outlining responsibilities:

Purpose: Represent your functional area in advising on policies, determining maintenance procedures and resolving cross-functional problems; ensure pertinent General Person maintenance rules and concerns are communicated to area members.

Duties:

- Ensure adequate time is available to serve as an area representative.
- Understand the particular needs of your represented area.
- Communicate your area's proposals and concerns by connecting periodically with individual users in your area and bringing issues to the Data Integrity Committee.

1.5 Duplicate Entries

General person data may be entered on a variety of forms, depending on the system and module used. Most name and address data are entered on “Identification” forms ending in IDEN (example: Student uses SPAIDEN, Alumni uses APAIDEN, Human Resources uses PPAIDEN, Finance uses FOAIDEN, and Financial Aid uses ROPAIDEN). Because Banner is a shared database, entry into any IDEN form affects all systems. It is critical that new records do not duplicate existing general identity (GIDPIDM) entries on the systems.

The term “duplicate PIDM” means that one single entity (whether an individual or corporation) has more than one Banner record. The existence of multiple identity records for one entity defeats the whole purpose of a relational database and raises questions as to the integrity of the data stored with these records - either multiple versions of the truth are stored or there exists incomplete information for an entity. Some results of such data integrity problems may be: 1) reports are invalid; 2) contacts are inaccurate; 3) inaccuracies can be seen as confusing or uncaring when communicating with both internal and external clients.

Each identified duplicate GIDPIDM problem takes hours to analyze and repair. Delays in handling duplicate records actually makes successful resolution more complicated and time consuming. If you should create or identify a duplicate record, immediately:

- Notify your representative on the Data Integrity Committee.
- That person will use GUASYST to determine the data usage in other modules, and email the bad record and the good record information to dupmgr@slu.edu and cc: data_integrity_committee@slu.edu

1.6 Disclosure of Data

It is each user's responsibility to be aware of and abide by all applicable laws and policies as well as the following:

- Users must comply with federal regulations (FERPA, HIPPA, etc.) and University policies applicable to data under the jurisdiction of their offices.
- Disclosure of information is restricted to Data Stewards or their representatives. Contact a Data Steward or direct representative (i.e., the Registrar or a representative of the Registrar for student information, for example) prior to disclosure of information.
- All data associated with individuals (students, employees, alumni, etc.) is private and shall be used only for the legitimate business of the University.

1.7 Data Stewards

University information is classified as either **public** or **confidential**. Public information refers to the type of information that can be freely shared with others, either internally or externally. Confidential information refers to the type of information that must be protected and may not be shared freely. The

Data Standards Document

protection of confidential information is of the utmost importance. Therefore, access to University confidential information is granted on a “need-to-know” basis only.

Because there are so many types of confidential, protected information stored and used within the University, specific procedures for the handling of each type of protected information must be developed and shared with all University employees dealing with this protected information in their work. To assist in the management and protection of confidential, protected University information, a representative for each protected type of data is appointed by the Provost. These representatives are referred to as “**Data Stewards**” and have broad responsibility for their respective data types. Data Stewards serve on the University’s Information Security Committee to ensure effective policy and procedure development and implementation concerning specially regulated types of University data. Typically, the role of Data Steward will be filled by a high-level participant in the daily handling of specific types of sensitive data (e.g. patient health information). Data Stewards will work to ensure that all policies, procedures, and standards regarding the use of sensitive University information are effectively implemented in their respective work areas. Data Stewards will also work to ensure ISC understanding of users’ needs.

Data Steward Responsibilities:

1. Develop data handling plans and procedures for review by the Information Security Committee. The ISC can provide additional advice or guidance in the protection of confidential information.
2. Ensure that all employees who handle confidential information are trained in proper information handling procedures. Data stewards will have the authority to enlist appropriate assistance from departments that deal with confidential data in order to accomplish goals related to education, reporting, and overall compliance.
3. Serve on the University’s Information Security Committee.

This Data Steward information is mastered and maintained at:

<http://www.slu.edu/provost/Adobe%20Pages/SLU%20ISC%20Handbook.pdf>

AREA of RESPONSIBILITY	DATA STEWARD
Student System	Registrar
Finance Systems	Controller
Patient Health	Privacy Officer
Electronic Health Records	Executive Director, UMG Administration
Clinical Practice Concerns	Appointee

1.8 Access to Official University Information

The following outlines the requirements and limitations for all University departments/divisions to follow in obtaining permission for inquiry and update access to the University's official records. Data security is everyone's responsibility and must be impressed upon all employees by training accomplished in conjunction with the use of Saint Louis University data systems.

1.8.1 Requests for Information Access

All requests for information access will be coordinated through functional area data Information Security Officers. Only those requests submitted to ITS by the Information Security Officers will be put into effect.

Requests for access to University information may include: 1) requests for access to Banner forms, reports and processes; 2) requests for reporting tool access; 3) requests to third-party products that connect to Banner or its associated databases.

For requests from Information Security Officers to ITS seeking new user IDs and passwords, Information Security Officers will ensure that the requested access is commensurate with completion of any required general system training and approval from the respective department. Account and password information will be transmitted to Information Security Officers or directly to the appropriate person.

Departments/divisions should take steps to ensure that they have an alternate person assigned as backup for each office function, and that this individual has access to the system functions required to perform these back-up functions.

Update access provides both inquiry and update capability. Update capability is generally limited to the offices directly responsible for the collection and management of the data. Update access is available to administrators and users who have an authorized need to change institutional data in the routine performance of their job duties.

Each user of university information is assigned appropriate combinations of inquiry-only and update access to specific parts of the administrative information system according to job function, need to know and need to act basis.

1.8.2 User ID Structure

User IDs for the Banner system and related systems will be the same as the individual's University email name.

1.8.3 Passwords

A password will be created when access to a given system is approved. Upon first entry into the system, the employee will be required to change the password. Password change frequency and password makeup will conform to general University password policy, guided by Information Technology guidance and documents. Instruction on how to change passwords will be provided in the required general training for the given system.

1.8.4 Forgotten Passwords

If a user forgets his/her password to a Banner-related system, the user should contact the ITS helpdesk staff, who will in turn make the password change.

1.8.5 Breached Passwords

If you think another person has knowledge of your user ID/password combination OR of another's user ID/password, contact the ITS helpdesk or your security officer to reset the password, or use the program functionality to reset the password yourself.

1.8.6 Sharing User IDs/Passwords

Users are not allowed to share a user ID or password with any other person. All use is governed by the University Acceptable Use Policy. A copy of this policy can be found at <http://www.slu.edu/its/policies.html>.

1.9 Information Users

Individuals are responsible for understanding all data elements that are used. If a person does not understand the meaning of a data element, he/she should consult the designated departmental trainer. Changes in underlying tables have to be approved by the Data Integrity Committee. Requests should be forwarded to the appropriate Data Integrity representative in your area. Users should exercise due care in using the institution's electronic information systems, both the central institutional database and all departmental systems, to protect data files from unauthorized use, disclosure, alteration, or destruction. Each person is responsible for security, privacy, and control of his/her own data. Each user is responsible for all transactions occurring during the use of his/her user ID and password.

1.10 General Notes

All employees who require access to online records **must** use the user ID and password assigned as a result of a fulfilled request.. This will allow updates to be tracked to a specific user ID and therefore a specific person. Web and self-service applications are not intended to be addressed by this section of this document.

Temporary employees and students shall not be given update capability for financial, human resources, and payroll transactions; nor will they be permitted update access to validation tables, and transactions that directly affect the student transcript (such as grades). This includes functions that create financial transactions (such as housing assignments and registration); this does not apply to transactions created by web self-service applications. Exceptions may be authorized at the discretion of the respective security officer. This includes functions that create financial transactions (such as housing assignments).

It is the responsibility of the department/division head to ensure that system access is canceled for employees who no longer work in his/her area. This can be accomplished by prompt notification to the respective security officer(s).

Human Resources will notify ITS of all terminations so that removal of access by any user ID associated with an employee can be accomplished. This does not eliminate the department/division head's responsibility to communicate terminations in a timely manner, but provides a back-up system to ensure that this closure occurs.

Any exceptions to these guidelines must be presented to the Data Integrity Committee for approval and inclusion in this document.

Saint Louis University Security Officers

AREA OF RESPONSIBILITY	SECURITY OFFICER
Student	Coordinator, Registrar's Office
Alumni/Advancement	IT Professional, Alumni/Advancement
Human Resources/Payroll	HRIS Administrator
Financial Services	Director of Financial Services
Enrollment Management	Director of Data Management

2 Record Searches

2.1 Person Name Searches

SEARCH FIRST - Before a user creates a new record for a person or organization, the user must conduct an ID and name search to ensure the person or organization has not already been created in the Banner database. All users must conduct a thorough search to prevent creating a duplicate record.

Every effort must be made to ensure that you are not duplicating an existing record. It is very difficult to effectively align all subsequent transactions under the proper single ID if a duplicate record is ever created. Careful searching will prevent the creation of duplicates.

- Searches **must** be done from an IDEN form or VEND form because these search ALL general person records; FTMVEND displays both person and non-person records. Searches from other forms restrict the information to records associated with that module. In the Finance module, **always add** records with the FOAIDEN form. In the Alumni module, use the SOAIDEN form for person searches and SOACOMP for non-person searches.
- For IDEN forms, eliminate any data in the ID field and <TAB> to the Name field.
- Type in portions of the name to be searched using the %(wildcard) to broaden the search.

Example: record = Dennis Redmond

Query as: Redmond, D%
(OR just Last Name of Redmond%)

Example: record = John McDonald

Query as: (without spaces) McDonald and (with spaces) Mc Donald

Query as: M%c%onald – this will return:

McDonald (without spaces)
Mc Donald (with spaces)
MacDonald (without spaces)
Mac Donald (with spaces)

Note: Some names have unique spellings. Search on all possibilities by broadening the wildcard search or use the “sounds like” function. Also, remember that suffixes are **NOT** part of the name.

Example: Fergason, Furgason, Ferguson

Input as: F% or F_rg%

- When a list of possible names is retrieved for a person, use other information to restrict the search (gender, birth date, social security number, ID number, previous names, state or zip code) and any other information available. **REMEMBER TO SEARCH FOR BOTH FULL AND COMMON VERSIONS OF NAMES.** For example, William as well as Bill; Lawrence as well as Larry.
- Also, remember to search using the middle name field. For example, C. Reid Lau goes by Reid. Search either by entering only the last name or do separate searches for Reid on both first and middle name fields.
- The underscore (_) key can be used to replace one character at a time. For example, to search for Anderson that may actually be Andersen use:

Anders_n – This will find both AndersOn and AndersEn records.

- For FOREIGN names, it may be easier to include the FIRST name as part of the search:

Example: record = Sayed Azmat Ali Shah

Query as: Shah, Sayed%

2.2 Non Person Name Searches

Note: If using Finance forms such as FTMVEND, remember to search the whole **database by putting an “A”** (for all) in the V (vendor) column. Otherwise, searches are restricted to only those records that have had Finance transactions.

- Non-person names may only be matched to their names. Use %(wildcard) when searching on ID in case there is punctuation or digits as part of the name. Example: I.B.M. or BONMAR1

The safest way to search on name is to include the wildcard at the front and at the end of the search.

- For example: %Bon Marche%. This would find “The Bon Marche” or “Bon Marche Inc.”
- Search on all separate portions of the name: %Bon% and %Marche%

2.3 Refining Name Searches

In order to assist in determining if existing records match the entity being searched for, users should use the functionality of Banner forms that allows refinement of search criteria with any and all of the following additional fields: gender; social security number; birthday; address components such as city, state and zip code;

3 NEW RECORD CREATION AND THE BANNER ID

3.1 General

Users must recognize several facts about entities in the central database as the Banner software comes into use:

1. **All name, ID, address, telephone, email information for an entity, as well as some bio-demographic information for person entities (gender, birth date, social security number, etc.), is now shared by all systems.**
2. At times, Saint Louis University is not given or does not have all necessary information regarding an entity. For example, a prospective student may initially give a nick name and a last name as opposed to the preferred full first name, full middle name and last name.
3. Entities may have several relationships over time (or simultaneously) with Saint Louis University. A person may be a faculty member, an alum and may be currently taking a class as well.
4. To ensure accurate record keeping across the entire system, every effort must be made to ensure users are not duplicating an existing record. It is very difficult to effectively align all subsequent transactions under the proper single ID if a duplicate record is ever created. Careful searching will prevent the creation of duplicates.

3.2 New Record Creation

Prior to creating a new record in the Banner system via one of the data entry forms, a thorough search must be performed in accordance with guidelines presented in Chapter 2 of this document.

Some new entities may be created via data loads, particularly during the recruitment of students. These forms have a 'matching' component to assist the user in determining whether an entity already exists in the system or not. Specific documentation exists in SCT documentation on the Banner product for the particular system (i.e., Student Recruitment, Financial Aid, etc.).

Minimally full name, date of birth, gender and zip code (or country for internationals) are required of prospects;

It is optional to request an SSN, however, because foreign prospects/applicants do not have an SSN and others may not wish to provide the information at an inquiry stage, or over the web, requiring the SSN from a prospect may be unrealistic and in the case of foreign prospects/applicant not possible.

Rules for automatic batch processing of prospects and applicants must be structured to look for matches on full name date of birth, gender, and zip code, rejecting all other records or individual review.

In the case of loading undergraduate applicants into Banner, the rules for automatic batch processing must be structured to look for matches on SSN which is required on undergraduate applicants, full name, gender, and date of birth.

Once a thorough search has been completed and the user is confident that a new entity needs to be created, the system-specific IDEN forms are used to create a new entity, using the following general guidelines (specific documentation on form usage should be found in SCT documentation for the Banner product and the specific system as well as being maintained in functional areas).

3.3 Banner ID

Banner forms will generate an ID (generally when the user clicks on a 'Generate' button). While the system will allow the user to enter a unique ID, Saint Louis University policy is to have the Banner system generate the unique ID. **A person's social security number will not be used as a Banner ID.** The Banner system allows for a history of IDs to be maintained. **A person's social security number will not be used as an alternate ID (in Banner terminology) or a former ID.**

An ID generated by Banner is a 9-character ID; the first character is definable by Saint Louis University and will be a '0' (zero); this will keep the entire ID as a numeric field and will make entry of IDs on self-service applications over the web somewhat easier. The following 8 characters come from a number, zero-filled at the left to ensure 8 character spaces are used.

During data migration to Banner, a person's social security number will not be stored in the Banner ID field as a current ID, previous ID or an alternate ID.

3.4 Data Required for New Records

To meet data needs of Saint Louis University and to ensure data integrity and accurate record keeping, the following components are required:

- name
- address and/or telephone number
- gender
- birth date
- social security number (optional)

Again, it is understood that at various points in the building of new records (new employees, potential donors, potential students), some of this data may not be available. If none of the information noted

above is available, data entry personnel should verify whether it is appropriate to add the new entity. These standards are determined and maintained by the Data Integrity Committee.

The remainder of this document describes standards regarding other shared data elements and the requirements surrounding their use to meet the information needs of Saint Louis University.

4 Names

4.1 General

Names in Banner should be entered in both upper and lowercase letters so that when a name or address is printed on correspondence, it looks contemporary and professional. Please refer to http://www.slu.edu/pr/communicators/slu_style_guide.html for questions on writing tips.

4.2 Name Formatting

Enter the last, first and middle names exactly as the person has indicated. If given the full middle name, enter the full middle name. Do not change a full name to an initial. Always use normal upper- and lower-case letters for names. The objective is to print the name on mailings, correspondence, etc. just like the “customer” wants it to be printed. Human Resources and Registrar’s Office must have the name as it appears on the Social Security card, a court order, marriage license or passport.

4.2.1 Case

If the person has written all upper-case letters, enter the **normal** upper- and lower-case letters. If the person's name starts with a lower-case letter, enter the first letter in lower case (duBois, for example). Externally obtained data feeds will be converted into this upper- and lower-case format.

4.2.2 Initials

Use a period after initials, whether a first name initial or a middle name initial. See the following examples:

D. Gary Smith (First name = D.; Middle name = Gary)

Pamela A. Humphrey (Middle name = A.)

Leslie B. F. Donner (Middle name = B. F.)

Note: Do not use an initial for the first name unless the name appears as such on legal name documentation (see 4.2).

4.2.3 Spaces

Maintain spaces in last names (one space maximum). See the following examples:

Van Buren

Van der Vaart

Vander Vaart

4.2.4 Punctuation

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

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

4.2.5 Prefixes and Suffixes

Do not enter prefix and suffix abbreviations in the name fields of the current identification block on the Banner IDEN forms

4.2.6 Previous Names

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

Example:

Name: Lee Livingstone

Previous Name: Lee Stanley

Enter previous name (Lee Stanley) and save.

Enter current name (Lee Livingstone) and save.

Previous name will appear in the previous identification block.

4.2.7 Legal Name

Saint Louis University will use the "current name" field in Banner to store the "legal name". The "Preferred First Name" field is used for variations of the legal name. **The "Legal Name" field in Banner is not used or maintained by the University.**

4.2.8 Preferred First Name

Offices may enter a name in this field. Individuals may enter or change their preferred name using Banner Self-Service.

Example:

William Knight -- Preferred First Name: Bill

D. Mark Wilson -- Preferred First Name: Mark

4.2.9 Non-Person Names

4.2.9.1 General (Non-Person)

“Non-persons” can be companies, organizations, or entities doing business with the University in a professional capacity. They could include suppliers, vendors, granting agencies, banks, institutions, government entities, and individuals. Vendors and non-student, non-employee individuals will be entered into the non-person name information field through the FTMVEND form for Finance or AOAORGN form for Advancement

Only one record and one identifier should exist for each non-person. It is important the database be searched thoroughly before adding a new non-person to Banner to ensure the entity or individual does not already exist. (See Section 2.2, Non-Person Name Searches.)

When using Finance forms such as FTMVEND, remember to search the entire database by putting an “A” (for all) in the V (vendor) column. Otherwise, searches are restricted to only those records that have had finance transactions.

The pound sign (#), percent sign (%), underscore (_) and asterisk (*) should not be used because they may cause ORACLE database errors.

4.2.9.2 Non-Person Names

Non-person names should always be entered in the non-person name field as listed on an invoice or other company document. Spaces are permitted between multiple names.

If an “article” (a, an or the) is used as an adjective within the full legal name on a non-person entry, it should be included when entering the name in Banner. If a non-person name begins with the word “The”, it should be included when entering the name.

Examples: ABC Trucking
 Diamond Life Insurance
 Smith King & Jones Inc
 J F Kennedy Co
 First National Bank
 The Copy Store

In the case of d/b/a, the person’s name would appear in the business name field and the d/b/a name becomes the first line of the address.

Example: John Doe d/b/a John’s Construction is entered as:
 John Doe (business name field)
 d/b/a John’s Construction (first line of address)

For businesses and organizations, avoid using an attention line or “in care of”. Reorganizations or turnover make them obsolete quickly. If an attention line or in care of line is necessary, use only an office or title rather than a name. The information should be entered on address line 1.

4.2.9.3 Uppercase / Lowercase (Non-Person)

Enter all information using mixed case (upper and lower case) and standard capitalization (See Section 4.2.1, Case). Never use all uppercase or all lowercase letters, except for acronyms, or when the name is all capitals (i.e., AJAX Plumbing).

4.2.9.4 Initials and a Non-Person's Name

Names should be entered with spaces between the words (See Section 4.2.3, Spaces).

Examples: A E Roberts Co
David & Gloria Morris Co

4.2.9.5 Punctuation (Non-Person)

Do not add punctuation where there is none (See Section 4.2.4)

Do not use periods (.).

Examples:	<u>If the Organization is....</u>	<u>Enter.....</u>
	R.J. Reynolds Co.	R J Reynolds Co
	F. & F. Securities	F & F Securities

Apostrophes may be used, but do not use spaces before or after the apostrophe.

Example: John’s Plumbing Supply

Commas should not be used between names.

4.2.9.6 Acronyms (Non-Person)

Acronyms and universally accepted abbreviations should be entered with no spaces and no periods between the letters.

Examples:	<u>If the Organization is....</u>	<u>Enter.....</u>
	I.T.T.	ITT
	N.Y.S. Department of Energy	NYS Department of Energy

4.2.9.7 Connective Words (Non-Person)

Connective words such as “and”, “in”, or “for” are to be entered in all lowercase except if they are the first word of the organization. The use of “And”, “Or”, and “&” should be determined by the preference of the company.

The Ampersand should only be used when part of a formal name. “And” should be used in all other cases.

Examples:

If the Organization is....

Baltimore & Ohio Railroad

C. Brewer and Company

Enter....

Baltimore & Ohio Railroad

C Brewer and Company

4.2.9.8 Hyphens and Slashes (Non-Person)

Hyphens or slashes may be used to separate names, but do not use spaces before or after the hyphen or slash. Spaces are permitted between multiple names, according to the preference of the vendor.

Examples:

If the Organization is....

Hayes-Albion Corporation

Citicorp/Citibank

Bryan Cave LLP

Enter....

Hayes-Albion Corp

Citicorp/Citibank

Bryan Cave LLP

4.2.9.9 Numerals as part of a Name (Non-Person)

If a numeral is part of the official corporate name, enter the numeral rather than spelling out the number.

Example: 21st Century Productions

4.2.9.10 Abbreviations (Non-Person)

In general, company names should not be abbreviated, however, when space limitation requires the use of abbreviations, abbreviate the last word at the end of the line. Punctuation should not be used (i.e. no periods). For a listing of commonly used abbreviations, please see Appendix C.

Example: Acme Cleaning & Maintenance is entered as Acme Cleaning & Maint

4.2.9.11 Government/Educational Institutions/Hospitals

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Departments and agencies of large entities should be entered with the entity as the vendor. Each department or agency should be listed as a separate address sequence.

Examples:

<u>If the Organization is....</u>	<u>Enter.....</u>
Vendor: Missouri Department of Revenue Address sequence 1 Address sequence 2 Address sequence 3	State of Missouri Department of Revenue Department of Transportation Department of Health
Vendor: University of Wisconsin Library Address sequence 1 Address sequence 2	University of Wisconsin Library SPT Conference
Vendor: St. Luke's Hospital-Radiology Address sequence 1 Address sequence 2	St Luke's Hospital Dept of Radiology Office of CME

4.2.10 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.

Examples of useful types:

MADN	Maiden Name
PREV	Previous Name
MARR	Married Name
LEGL	Legal Name

4.3 Procedures

4.3.1 Adding New Records

Person and non-person records are created when someone enters them in Banner for the first time. Creating new records is restricted to specific departments and these units must follow these data standards when creating new records.

4.3.1.1 Creation of New Person or Non-person Record

The following departments have the ability to create a new student or general person or non-person record.

- All University admitting offices
- Human Resources
- University Registrar
- Alumni/Advancement
- Office of the Provost
- Purchasing
- Controller's Office/Accounts Payable

4.3.1.2 Searching for Multiple Records

Chapter 1 of this document regarding Duplicate Entries and Chapter 2 of this document with regards to Searching identify the need for and the mechanism for extensive searching prior to adding records to the system.

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.

4.3.2 Name Change Policies (IN DEVELOPMENT WITH CAROL, JOHN, and JENNIFER)

Whenever a constituent requests a name change it is necessary to determine (using GUASYST) in which modules the record occurs.

Informed professional judgment must be used to determine what constitutes a name correction (i.e. data entry or 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.

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

Person/Non-Person	Procedures
Employee (faculty or staff or student worker)	Human Resources will make

<p>– whether or not any other record type exists</p>	<p>the change. Use Name Change Form and requires presentation of Social Security Card; a Passport and Social Security application receipt is required for non-U.S. citizen student workers only. See Name Change Form for procedures.</p>
<p>Student (current or former) – excluding alumni, current employees and current student employees (<i>who should follow “Employee” guidelines above</i>)</p>	<p>University Registrar may make changes. Use Name Change Form and require one of the following: Social Security Card Marriage License or Certificate Court Order Document Driver’s License Passport See Name Change Form for procedures.</p>
<p>Accounts Payable Vendors</p>	<p>Accounts Payable, Tax Compliance or Purchasing staff will make change if no other record exists for vendor.</p>
<p>Admission recruit or applicant, not a current student or employee</p>	<p>Admitting office may change upon request of individual.</p>
<p>Alumni and constituent (no current student or current year employee record type exists)</p>	<p>Alumni/Advancement will make change upon request of constituent.</p>

4.3.3 Name Change Report

An audit report of name changes will be run (weekly) by Human Resources, Payroll, University Registrar, Alumni and Advancement, and the Admitting Offices to reconcile name change activity and documentation. If a name change has been made that requires additional documentation, it is the concerned unit’s responsibility to follow up with the unit implementing the change and/or the person whose name has been changed, as appropriate.

4.3.4 Name Change Form

See Figure 1.0

Figure 1.0

Name Change Form
(Please Print)

SLU ID or SSN: _____

Current Name: _____

New Name: _____

Date of Birth: _____

Day Telephone: _____ E-mail: _____

Statement of Responsibility:

I assume responsibility for any adverse outcome or problems that may occur as a result of this change of my name.

Signature: _____

Other Information:

Are you currently a Perkins Loan Borrower or a Financial Aid recipient through Student Financial Services?

Yes No

FOR OFFICE USE ONLY

Received by	Name:	Dept:	Date:
Changed by	Name:	Dept:	Date:
Required Documents:			
<u>Faculty/Staff/Student Employees</u>			
Human Resources/Payroll requires a Social Security Card. Forward to Human Resources – Salus Center)			
<u>Students/Alumni with Financial Aid or Perkins Loans</u>			
Student Financial Services requires a Social Security Card, Court Order, Marriage License or Passport. Forward to Office of Scholarship / Financial Aid – DuBourg Room 121			
<u>All Students/Alumni</u>			
For last name changes due to Marriages only – the Registrar’s Office requires the signed Name Change Form. For first or middle name changes – the Registrar’s Office requires a Social Security Card, Court Order, or Passport. Forward to the Registrar – DuBourg 22 , Attn: Name Changes			

5 Addresses

5.1 General

University-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, units with marketing responsibility (such as Advancement, University Relations, and Undergraduate Admissions) must be able to produce individualized correspondence conforming to formal addressing rules. Units such as Student Financial Services and Accounts Payable may have less stringent formatting requirements, but should still follow the standards set forth here. These standards must balance four considerations:

1. Banner System Requirements
2. Accepted standards for formal communications
3. U.S. Postal Service guidelines
4. International address requirements

All addresses must meet US Postal Service addressing requirements. The guidelines expressed herein are designed to convey the minimum standard requirements to enhance the processing and delivery of mail, reduce instances of 'undeliverable' mail, and position the University to obtain the most advantageous postal rates (using ZIP Plus 4 is an example).

While data may be conditioned (or reformatted) on output (e.g. date format), it is our intention that addresses be entered exactly as they will print on correspondence, reports, etc. Accurate, consistent address data entry is vital. Given these considerations, the following address data entry standards are recommended.

5.2 Standards

All information is typed in upper/lower case format (i.e. not all caps or all lower case).

ITS assumes the responsibility of maintaining an annual contract with the U.S. Postal Service or certified vendor to provide Saint Louis University with regular updates to the zip code tables and related City, State, County relationships.

5.2.1 Symbols

Symbols should never be used in the first position of an address field.

The ampersand '&' should never be used in place of 'and' except as explicitly stated elsewhere in this document.

The percent symbol '%' should never be used.

The designation for 'in care of' can be used for a person record and should be abbreviated as 'c/o' and entered on the first street address line

The underscore character '_' should never be used.

Never use a pound sign '#' within an address because it can cause a problem

with the Banner letter generation function.

5.2.2 Street Names

Street names are composed of a number, the street name and a possible unit designator.

5.2.3 Punctuation

Punctuation in the street number and name should not be used unless needed for clarity or designated fractions.

Periods:	39.2 Rd
Slashes (fractional addresses):	101 ½ Main St
Hyphens (hyphenated address):	289-01 Montgomery Ave
Hyphens (ZIP Plus 4)	63021-3328

5.2.4 Secondary Address Unit Designators

Secondary Address Unit Designators - If the address is a multi-unit apartment or building, place the room, suite or apartment number to the right of the street address on the first address line separated by a space.

For example:
456 Elm Blvd Apt 123

If the primary address uses all available characters on the address line, 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.

Examples:
Ste 202
1356 S Executive Dr

Recommended abbreviations for common unit designators are:

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

Refer to the Postal Addressing Standards publication for other unit designator abbreviations.

5.2.5 Compass Directions

If appropriate, compass directional words may be abbreviated at the beginning

and/or end of the street name. Since a directional word could be confused with the street name, apparent directional words in the middle of the address line should be spelled out; the second directional word must always be spelled out if space will not allow both to be spelled out.

Examples:

102 N Main St SW
160 North South St
1624 N South Blvd

Compass directional words should be abbreviated as follows:

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

Do not use abbreviated compass directions in city names if you have enough space to enter the entire city name spelled out.

5.2.6 Street Address and P.O. Box

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

Example:

Dr John Franklin Smith
Evergreen Bldg
1379 W Pine
PO Box 2351
Denver CO 87003

Do not enter data into the second address line until data has been entered into the first address line. Also, data should not be entered in the third address line until data has been entered into the second line. An example of a three-line address is:

c/o Marvin Martian
Chanin and Levers Inc
1600 Martian Blvd, Ste 910

5.2.7 Abbreviations for Street Designators

Street designators should follow the standard U.S. Post Office standards, **with the exception that punctuation will be used, in accordance with Section 5.2.3 of this document.** Refer to the U.S. Postal Service Address Standards publication for abbreviations of designators not listed below.

STREET SUFFIX	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

5.2.8 Sources for Additional Information

There are style manuals that deal with formal addressing style. Several U.S. Postal Service publications deal with addressing standards. 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 US 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/CPC2/menu_O1.html

5.2.9 City

Banner is configured to automatically enter the city name when a zip code is entered. This is the preferred method of entering the city name. All information is typed in upper/lower case format, i.e. not all caps or all lower. Spell out city names in their entirety (except for names like 'St Louis' and 'St Paul'). If it is necessary to abbreviate city names to fit within the 20 characters allowed by Banner, use abbreviation standards described herein or in the US Postal Service Postal Addressing Standards.

Examples:

Preferred

West Stockbridge
Newberry Springs

Acceptable

W Stockbridge
Newberry Spgs

5.2.10 State and Province

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

State codes must be entered for all U.S. and Canadian addresses. The appropriate code may be selected using Banner software. For additional information, refer to the Postal Service Address Standards publication. (System generated from zip code entry).

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.

5.2.11 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 (PUB 6-4, May 2002). If no county defaults when entering the zip, enter the county code from the list of values in the validation form.

5.2.12 Zip or Postal Code

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

5.2.12.1 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.

Examples:

97203
97203-5798

5.2.12.2 Canada

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

Examples:

T2T 2Y5

5.2.13 Nation

A nation code is required for all non-U.S. addresses. Banner maintains a list of all the current code options available (FIPS PUB 10-4).

Here is a reference: <http://www.state.gov/s/inr/rls/4250.htm>

DO NOT enter a country code for U.S. addresses. Banner is configured to automatically enter the country name when a zip code is entered. In Banner, the default country designation is "U.S."

5.2.14 Military Address

5.2.14.1 Overseas Locations

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

Enter the zip code in the zip code field

The APO or FPO code will default into the City field

The military 'State' code (AA, AE or AP) will also default into the State field.

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)

AP for mail destined to the Pacific (962 through 966)

Examples:

SSGT Mario Martian
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

5.2.14.2 Domestic Locations

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

Examples:

Col Margaret Henry
Lowery Air Force Base
8205 East Sixth Avenue 405
Denver CO 80234

Capt Jack Harris
2314 Barracks St
Minot AFB ND 58705

5.2.15 International Addresses

Enter an international address exactly as provided if possible, including punctuation. Try to avoid commas, however, 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. Canadian addresses should use the state/province code field for the province code.

Use the Nation Validation values to enter nation or country codes. This way the University can better control the printing of international addresses on letters and forms.

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

5.2.16 Exceptions for non-person addresses

General

Please follow the address guidelines established above, with the following exceptions, which are specific to non-person addresses:

Banner's address format allows three lines of street address information. It is important to remember that Banner requires entry in the first address line. Do not enter data into the second address line until data has been entered into the first address line. For most US addresses, only the first two address lines should be used. Foreign addresses will often use all available lines.

Note that the US Postal Service delivers to the last line above the city when making deliveries. For example, in the event both a street address and a PO Box are included, the line above the city will dictate where the package is delivered.

Multiple addresses may be entered using different address types.
Relevant address types for non-persons:

AP – Accounts Payable

BU - Business address, main or permanent address for persons (companies)

only.
OF – Order from

Do not enter corporate titles as part of an address.

5.2.17 Hierarchy of Modifications

When it is necessary to modify addresses to fit Banner fields or conventions, follow these steps in order:

When secondary delivery information, e.g., Apt. or Suite, is part of the address but does not fit on the Delivery Address Line, wrap up all components of the secondary information immediately above the Delivery Address Line.

Original text:

Ms. Michelle Simpkins
58000 East Happy Canyon Boulevard, Building 14-400
Aurora, CO 80111-1111

Changes made to:

Ms Michelle Simpkins
Building 14-400
58000 E Happy Canyon Blvd
Aurora CO 80111-1111

5.2.18 Address Types

The purpose of this particular standard is to maintain a standardized list of address types based on purpose of the address, rather than separate address types for each University department. Thus, an individual may appear in accounts payable, be an alumni, employee and enrolled as a current student in the Cook School of Business and have only a single address. The Alumni Office can put a "preferred indicator" on any address type in the alumni module. This indicator cannot be viewed in any module except Alumni.

Each Banner application (e.g. recruitment mail, billing grades and gift solicitations) will look for a valid address in a prescribed sequence. For example, the grade mailing routine might look for addresses in this order: SM, MA and then LO. Admissions might typically search for a mailing address in this order: SM and then MA. Identical addresses should not be keyed in different address types.

The following table describes address types defined for Saint Louis University's Banner System.

Code	Description	Explanation
AP	Accounts Payable	Remit To Address For Finance – Accounts Payable
BI	Billing	Billing Address

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Address used for person billing purposes. It may contain an address that is different than the MA or LO address for said person. These addresses are created, maintained and deleted by the Student Financial Services, University Registrar and students in the Student Module.

BU	Business	<p>Business Address</p> <p>This is the principal address for non-person entities for all systems - addresses for the purpose of submitting purchase orders are maintained separately within the Finance module.</p>
EC	Employee Campus	<p>SLU Employee Campus Address</p> <p>A SLU employee's physical location (office/department) on campus. List in primary order if employee works in multiple locations. This address will be used to create the campus directory and for any on-campus mailings to employees. Accounts payable will use this address to refund money to an employee.</p>
DM	Diploma	<p>Diploma Mailing Address</p> <p>Address to which a diploma will be mailed for a graduating student. Diplomas are delivered by the USPS, hence the address may contain a P.O. Box. This address type is created, maintained and deleted by the Office of the University Registrar.</p>
EL	External Loads	<p>Temporary data load address type used for AMCAS data loads (School of Medicine applications).</p>
GR	Grant	<p>Grant Billing Address</p> <p>Used by the Grants Finance Office in the Finance Division.</p>
I2	I20	<p>I-20 Address</p> <p>This address contains the name and address of a third-party person to whom the International Center may release an 1-20 for an international student. The International Center must have written authorization from the student to release the 1-20 in this manner. The address is start-dated the date the authorization is received and end-dated the date of the 1-20 release. These addresses are created, maintained and deleted by the International Center.</p>
LO	Local	<p>Off Campus Local Address</p> <p>This address type is used for prospects, applicants, and enrolled students to record an off-campus, local address that is different than their MA-permanent mailing address. For international students living off-campus, this address type will record the</p> <hr/>

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physical location of the student that is used for SEVIS reporting. On-campus address for students will be listed under address Type 'RH = Residence Hall'. Students living with parents and commuting to SLU will be recorded as an MA address type and will not have an LO address.

MA	Permanent	Permanent Mailing Address This is the permanent mailing address for faculty, staff, prospects, applicants and enrolled students. For international students, this address type will record the home country address used for SEVIS reporting. This address is the default address type for Admissions and Financial Aid tape loads although it may not reflect a true permanent mailing address until the student applies for admission. (This address type is the default address type for the Banner System and is required by Banner for Student tape load processing and Alumni/Advancement Student Loading Processes.)
OF	Order From	Order From Address For Finance – Purchasing
PA	Parent	Parent Address of a Student. This address type is created, maintained and deleted by Admissions, Financial Aid, Alumni and Student Financial Services for parent loans. (Required by Banner for tape load processing)
RH	Residence	Residence Hall Address This is a student on-campus housing address created, maintained and deleted by the Housing Office. This address must include room number and hall in order to meet the needs of the International Center for SEVIS compliance.
SC	Student Campus	Busch Center Mail Box Address
SM	Seasonal	Seasonal and Other College Campus Mailing Address This address type is used to maintain a temporary addresses.
TX	Tax	Do not use – this is used for temporary mailings of W-2 forms
WK	WORK	Non-SLU Work Address

Data Standards Document

This address type is intended for the Office of Admissions to record the work address of SPS, Professional and Graduate School applicants. DO NOT use this address type for SLU employee address.

XX TGR FEED Used internally by Banner (Student AR Feed to Finance)

5.2.19 Office(s) responsible for creation and changes of each address type.

ADDRESS TYPE	DESCRIPTION	OWNER
AP	Accounts Payable	Accounts Payable
BI	Billing Address	Student Financial Services
BU	Business Address	Finance, Alumni/Advancement????
DM	Diploma Mailing Address	Office of the Registrar
EC	Employee Campus Address	Human Resources
EL	External Load	Admissions & Registrar
GR	Grant Billing Address	Finance
I2	I-20 Address	International Center
LO	Local Mailing Address (Off-campus)	Office of the Registrar
MA	Permanent Mailing Address	-Faculty/Staff Human Resources -Recruits/applicants – Admissions -Students - Office of the University Registrar Office of the Provost Purchasing Accounts Payable Alumni/Advancement
OF	Order From Address	Purchasing
PA	Parent Address of a Student	Student Financial Services, Admitting Offices and Alumni/Advancement
RH	Residence Hall Address	Housing
SC	Student Campus	Admissions & Registrar
SM	Seasonal Mailing Address	International Center, Admitting Offices, University Registrar
TX	Tax	Human Resources
WK	Work Address for non-SLU Employees	Admitting Offices, University Registrar, Alumni/Advancement
XX	Used internally by Banner	Accounts Receivable/Finance???

5.2.20 Address Sources

Sources of the address are shown on the STVASRC table.

CODE	DESCRIPTION
ACT	ACT Tape
APP	Application
CERG	CE Registration Form
CONV	Conversion Address
GMAT	GMAT Tape
GRE	GRE Tape
LSAT	Law School Admission Test
MCAT	Medical College Admission Test
NCRU	NCCRUA Tape
POST	Post Office
PSAT	PSAT Tape
SAT	SAT Tape
SELF	Self Reported
TRAN	Transcript
WEB	World Wide Web
XACP	Purchased Name - ACT Plan
XACT	Purchased Name – ACT
XNCR	Purchased Name – NCCRUA
XPSE	Purchased Name - PSA T
XSAT	Purchased Name – SAT

5.3 Guidelines

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

6 Telephone Numbers

6.1 General

An entity (person or non-person) may have multiple telephone numbers within the Banner system. Telephone numbers should be accurate and reflect the most recent data received. Supplemental information for international phone numbers may be added in the international access code field. Banner forms used to maintain telephone numbers are: APATELE, FOATELE, PPATELE, RPATELE and SPATELE.

6.2 Standards

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

6.2.1 Telephone Types

A telephone type distinguishes each telephone number entered in the Banner system. There are two categories of telephone types:

6.2.1.1 General Telephone Types

This is a telephone number associated with a person or a non-person that is not related to a specific address.

GENERAL TELEPHONE TYPES

CODE	DESCRIPTION	EXPLANATION
CE	Cell Phone Number	Cell phone number associated with a person or non-person
FAX	Fax Number	Fax number associated with a vendor in the Finance module.
PAGE	Pager Number	Pager number associated with a person

6.2.1.2 Address Telephone Types

This is a telephone number associated with a specific address of the same type. Each address type defined in General Person will have a like Address Telephone Type defined.

6.2.3 Telephone Numbers

The telephone number is presented in a three-field format.

6.2.3.1 Area Code

The three-digit area code must be entered for all phone numbers including the local areas, i.e. 314, 618, 636, etc.

6.2.3.2 Phone Number

Enter the seven-digit number without inserting a hyphen.

Example: 4871849

6.2.3.3 Extension

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

Example: 7300

6.2.4 International Telephone Numbers

6.2.4.1 International access code field

International telephone numbers should include the country and city codes as part of the international access code field.

6.2.4.1.1 Country Code

The country code consists of one to four digits and is required (e.g. 876)

6.2.4.1.2 City Code

The city code consists of one to three digits. Not all countries utilize city codes. The city code is often reported with a leading zero (0). Do NOT enter the zero.

"011" must be dialed when making international calls from the United States unless dialing to any country included in the North American Numbering Plan.

6.2.4.2 North American Numbering Plan (NANP)

This agreement, held among many North American countries (Mexico is not included) establishes a procedure for dialing international numbers in a way that is similar to traditional United States procedures (1 + area code). The country code for all NANP countries is 1. The following countries are considered to be a part of the NANP and can be dialed using 1 + the three digit area code. Any phone numbers from NANP countries can be entered in the domestic phone number field in the Banner system.

Country	Area Code
Anguilla	264
Antigua	268
Bahamas	242
Barbados	246
Barbuda	268
Bermuda	441
British Virgin Islands	284

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Canada	Multiple
Cayman Islands	345
Dominica	767
Dominican Republic	809
Grenada	473
Guam	671
Jamaica	876
Montserrat	664
Northern Marianas Islands (Saipan, Rota and Tinian)	671
Puerto Rico	787
St. Kitts/Nevis	869
St. Lucia	758
St. Vincent and Grenadines	784
Trinidad and Tobago	868
Turks and Caicos Islands	649
U.S. Virgin Islands	340

6.3 Guidelines

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

NOTE: Telephone numbers, while displayed on SPAIDEN with the address, are not stored with the address in the Banner tables. Telephone numbers must be changed on the SPATELE form, not the SPAIDEN form.

7 Email

7.1 General

An entity (person or non-person) may have multiple email addresses within the Banner system. However, the SLU email address will be used for all University official correspondence. Email addresses should be accurate and reflect the most recent data received. The SLU email address should be set as the preferred for all current students.

7.2 Standards

CODE	DESCRIPTION
BUS	Work Email Address
PARN	Parent's Email Address
PERS	Personal Email Address
SLU	SLU Email Address

7.3 Guidelines

The SLU email address should be the same as used by the University portal software (Luminis).

When adding a subsequent email address of the same type, the prior email address should be marked 'inactive' and the new email address added. Unless making a correction due to an initial entry error, do not change or delete the prior email address.

8 Calendar Dates

8.1 General

Dates are entered on a variety of forms for various purposes.

8.2 Standards

8.2.1 Calendar Dates

Dates will always be entered in Banner in the format **MMDDYYYY** or **01032003**. Banner will redisplay the date in the **03-Jan-2003** format. The University prints dates in the format **Jan. 3, 2003**.

9 Gender

9.1 General

The U.S. Department of Education requires the University to report gender information.

9.2 Standards

9.2.1 Gender

Code	Description	Explanation
M	Male	A male person, man or boy
F	Female	A female person, woman or girl
U	Unknown	Gender cannot be determined by the name; i.e., Chris, Pat

NOTE: All employees, prospects, applicants, and students **must** be classified as a male or female.

10 Social Security Number (SSN)

10.1 General

The Social Security Number field in Banner is labeled: SSN/SINITFN

SLU's policy is that only a U.S. Social Security Number will be entered into this field for US citizens. For international citizens, enter "F" followed by the last eight digits of the Banner userid (example: F00123456).

A U.S. social security number is required for all employees and independent contractors, and preferred for U.S. students. Social security numbers are not required for international students unless they are employees or receive any type of financial aid.

10.2 Standards

Enter the entire 9-digit U.S. Social Security number, omitting dashes and spaces between numbers (e.g. 123456789).

10.3 Guidelines

A person must present a copy of his or her social security card in order to have his/her social security number changed within Banner. Professional judgment should be used when making corrections to social security numbers based on error at initial entry.

If a person is a SLU faculty or staff member, Human Resources will make the change and send a notification with the correct number to the Payroll Office.

Students will direct social security number change requests to the University Registrar.

11 Date of Birth

11.1 Standards

11.1.1 Date of Birth

- The Date of Birth is required for employees, current students and those applying for admission to Saint Louis University.
- The Date of Birth is optional for alumni and friends of the University.

11.1.2 Changes to Date of Birth

An employee or current student making a date of birth change request must present a birth certificate. The person must present an original birth certificate to either Human Resources or the Office of the University Registrar. The Alumni/Advancement office may change alumni birth dates for alumni and constituents (i.e., where no current student or current employee record exists).

12 Marital Code

12.1 General

Marital status is maintained for all SLU students applying for financial aid, SLU employees and constituents of the University.

12.2 Standards

Marital status is maintained on the SPAPERS form in General Person.

Code	Description	Explanation
D	Divorced	Legally divorced
M	Married	Legally married
P	Separated	Legally married, but separated
S	Single	Never married
U	Not reported	Marital status is not reported
W	Widowed	Widowed, and not remarried

12.3 Guidelines

Changes to marital status may originate with Human Resources or Alumni/Advancement or the University Registrar.

13 Ethnic Codes

13.1 General

Ethnicity is tracked for purposes of federal and state reporting requirements. Banner provides one field in which to track both race and ethnicity.

13.2 Standards

In Banner, the STVETHN table stores the valid codes for ethnicity and is referenced in each module where person-data is maintained. The table allows for an enterable code, a description, and a related IPEDS code for federal reporting. The finest grained detail will be included in the Ethnic Code, allowing for the recording of either a generic code (single character) as well as a more specific code (using two characters). Conforming to the standard below should allow Saint Louis University to meet all needs across all reporting levels from various administrative and academic departments recording this data. (Descriptions below come from IPEDS reporting documentation and from Medical School reporting requirements to the AAMC.)

Banner Code	Description	IPEDS Equivalent
10	Alaskan Native	2
15	American Indian	2
20	Asian	3
25	Black (non-Hispanic), African American	1
30	Caucasian, Non-Hispanic	5
35	Chicana/Chicano/Mexican American	4
40	Hispanic or Latina/Latino	4
45	Native Hawaiian	3
50	Pacific Islander	3
55	Puerto Rican	4
80	International	7
85	Other	6
90	Not Available	6
95	Do Not Wish to Respond	6

13.3 Guidelines

For all students and employees who are U.S. citizens or U.S. permanent residents, the 'ethnicity' field on the SPAPERS form must be completed with a valid value.

For all students or employees who are non-resident aliens, the code used must be "80" since, for reporting purposes, that status takes precedence over any recording of ethnicity.

This field is optional for constituents who are friends of the University.

Currently IPEDS does not accept multi-racial coding. For those who indicate multi-racial background, use the code for 'Other' on this form.

14 Deceased Information

14.1 General

Due to the sensitivity of this issue, prompt attention is important so future mailings from University offices are discontinued. Deceased status must be verified information, not just perceived information.

14.2 Standards

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

14.3 Guidelines

If you receive notification that a person has passed away, do the following:

1. Check the General Person form GUASYST to see which Banner applications track this person.
2. Using email, notify the contact person for each Banner application you identified in step 1. Include the following information in your email:
 - Name of Person
 - Banner ID
 - Date of Death (if known)
 - How you found out about it

BANNER APPLICATION	CONTACT PERSON
Human Resources	Human Resources, Payroll, Office of the Provost
Student	Office of the University Registrar
Financial Aid	Financial Services
Finance	Financial Services
Alumni and Advancement	Advancement

15 Prefix Codes – Names

15.1 General

Standard prefixes should be collected and maintained as part of the person record.

15.2 Sample Prefixes

Samples of standard prefixes are found below. See Abbreviation Section of Webster's Dictionary if not below.

Bro.	Brother
Dr.	Doctor
Fr.	Father
Miss	Miss
Mr.	Mr.
Mrs.	Mrs.
Ms.	Miss or Mrs.
Rev.	Reverend
Sr.	Sister

Senor	Senor
Sra.	Senora
Srta.	Senorita

16 Suffix Codes – Names

16.1 General

Standard suffixes should be collected and maintained as part of the person record.

16.2 Standards

16.2.1 Sample Suffixes

Samples of standard suffixes are found below. See Abbreviation Section of Webster's Dictionary if not below. Religious Orders are included below as well.

D.D.S.	Dentist
D.M.D.	Doctor of Dental Medicine
Esq.	Esquire
J.D.	Juris Doctor
Jr.	Junior
M.D.	Doctor of Medicine
Ph.D.	Doctor of Philosophy
RN	Registered Nurse
Sr.	Senior

Religious Orders are abbreviated as follows:

ASC	Adorers of Blood of Christ
ASJ	Apostles of the Sacred Heart of Jesus
BS	Bethany Sisters
BVM	Sisters of Charity of the Blessed Virgin Mary
CCV	Congregation of the Sisters of Charity of the Incarnate Word
CDP	Sisters of Divine Providence
CFS	Carmelite Fathers and Sisters
CHM	Congregation of Humility of Mary
CIC	Sisters of Immaculate Conception
CIJ	Congregation of the Infant Jesus
CM	Congregation of the Missions
CMF	Claretian Missionary Fathers & Brothers
CND	Congregation of Notre Dame
CP	Passionist Priests & Sisters
CPP	Sisters of the Most Precious Blood
CR	Congregation of Resurrection
CSA	Sisters of the Congregation of St. Agnes
CSB	Congregation of St. Brigid
CSC	Priest of the Congregation of the Holy Cross and Sisters
CSF	Felician Sisters

Data Standards Document

CSJ	Sisters of St. Joseph
CSM	Sisters of St. Martha of Prince Edward Island
CSP	Sisters of St. Joseph of Peace
CSS	Redemptorist Fathers
DC	Daughters of the Cross
DCV	Daughters of Charity of St. Vincent DePaul
DW	Daughters of Wisdom
FMM	Franciscan Missionaries of Mary
FSC	Brothers of Christian Schools
FSM	Franciscan Sister of Mary
FSP	Congregation of the Sisters of the Third Order of St. Francis of Perpetual Adoration
HM	Sisters of Humility of Mary
HRS	Missionary Sisters of Our Lady of the Holy Rosary
IHM	Immaculate Heart of Mary
MHM	Mill Hill Fathers
MHS	Convent of the Most Holy Sacrament
MM	Maryknoll Sisters of St. Dominic
MMB	Mercedarian Missionaries of Berriz
MMM	Medical Missionaries of Mary
MS	Missionaries of Our Lady of LaSalette
MSC	Missionaries of the Sacred Heart of Jesus and Our Lady of Guadalupe
MSF	Congregation of Missionaries of the Holy Family
ND	Notre Dame Sisters
NDS	Notre Dame Du Sacre Coeur
OCD	Discalced Carmelite Fathers
OFM	Franciscan Fathers
OMI	Oblates of Mary Immaculate
OP	Order of St. Dominic
OSB	Benedictine Sisters or Fathers
OSC	Order of St. Clare
OSF	Franciscan Sisters
OSM	Servants of Mary
OSU	Ursuline Sisters
PBV	Presentation Sisters of the Blessed Virgin Mary
RGS	Sisters of Our Lady of Charity of Good Shepherd
RSC	Society of the Sacred Heart
RSM	Sisters of Mercy of the Union in the U.S.A.
SA	Franciscan Sisters of the Atonement
SAC	Sisters of the Catholic Apostolate
SBS	Sisters of Blessed Sacrament for Indians and Colored People
SC	Sisters of Charity of Cincinnati, OH
SCC	Sisters of Christian Charity
SCL	Sisters of Charity of Leavenworth
SCM	Sisters of Charity of Our Lady, Mother of Mercy
SCN	Sisters of Charity of Nazareth
SCQ	Soeurs dela Charite de Quebec
SDR	Sisters of the Divine Redeemer

Data Standards Document

SDS	Sisters of Divine Savior
SGM	Sisters of Charity of Montreal
SJ	Society of Jesus
SL	Sisters of Loretto at the Foot of the Cross
SLW	Sisters of the Living Word
SM	Brothers of Mary
SMB	Society of Bethlehem Missionaries
SMI	Sisters of Mary Immaculate
SMN	Montfort Missionaries
SMP	Daughters of Our Mother of Peace
SND	Sisters of Notre Dame
SP	Providence Sisters
SPC	Sister of St. Paul of Chartres
SSA	Sisters of St. Ann
SSJ	Sisters of St. Joseph of the 3rd Order of St. Francis
SSM	Sisters of the Sorrowful Mother
SSND	School Sisters of Notre Dame
SSS	Servants of the Blessed Sacrament
SVD	Society of the Divine Word
SVM	Visitation Sisters
VHM	Visitation Nuns
VSC	Vencion Sisters of Charity

17 Citizenship and International Persons Information

17.1 General

Citizenship information is required for students and employees at SLU. Additional information, such as country of citizenship and visa status, is required for any person who is not a citizen of the United States.

Citizenship and related information is maintained by the following offices:

Human Resources	for staff, faculty and student workers
Office of the Controller / Tax Compliance	for vendors and direct pays
Office of Admissions	for persons applying as students
International Center	for international students and scholars after they enroll. Also tracks information on certain non-citizens who are employed by SLU.

Any changes to citizenship or visa information must be coordinated through Human Resources, University Registrar or the International Center as identified by checking the Banner form GUASYST.

17.2 Standards

17.2.1 U.S. Citizen Type

A person's citizenship is entered and maintained on the SPAPERS form in General Person using the following values:

Banner Code	Description
-------------	-------------

Data Standards Document

Y	Yes - this person is a U.S. citizen
N	No - this person is not a U.S. citizen
P	Permanent U.S. resident with a green card
S	This person is a citizen of Spain

Citizenship is used in IPEDS reporting for Human Resources.

17.2.2 Country of Citizenship

Country of citizenship is maintained on the SPAINTL form in General Person. The country codes are the same as those used for addresses.

17.2.3 Visa Status

Visa status is maintained for all non U.S. citizens. Visa status for students is established by the Office of Admissions and maintained by the International Center. Visa status for non-student employees is maintained by Human Resources.

17.3 Guidelines

If the person is a student or an employee, this information is required. If the person is a constituent and not a student or employee, this field may be left blank to indicate U.S. citizenship is not known.

18 Confidential Records

18.1 General

There are various laws that govern the confidentiality of information that will be stored in Banner. Some of these include the Family Educational Rights and Privacy Act (FERPA), the Graham-Leach-Bliley Act (GLB) and the Health Insurance Portability and Accountability Act (HIPAA). All those using Banner to access information should always be aware that their access to information stored in Banner is provided with the understanding that they will maintain the strict confidentiality of this data.

18.2 Standards

18.2.1 Confidential Information Indicator

If a student completes a "Request to Withhold Information" form, then the student's directory information will not be disclosed to the public.

18.2.2 Disclosure of Student Information

18.2.2.1 Buckley Amendment

Students have a right to inspect their education records at the University and to request amendment to those records if they believe them to be inaccurate. The FERPA law (also known as the Buckley Amendment), and its implementing regulations, may be reviewed in the Office of the Registrar, Room 22, DuBourg Hall. A student has the right to file a complaint with the U.S. Department of Education concerning alleged failures by Saint Louis University to comply with FERPA requirements with:

*Family Policy Compliance Office
U.S. Department of Education
400 Maryland Avenue, SW
Washington, DC 20202-4605*

18.2.2.2 Directory Information

The law provides that “Directory Information” may be released without the consent of the student unless s/he has specifically asked that prior consent be obtained. Saint Louis University designates the following student information as “Directory Information”: The student’s full name, campus email address, campus, college, and class.

18.2.2.3 Disclosure Policies

Saint Louis University assumes that failure on the part of any student to specifically request the withholding of categories of information indicates individual approval for disclosure.

- Any student wishing that directory information not be released must submit a “Request to Withhold Information” form (see Figure 18.1) to the Office of the University Registrar, DuBourg 022. This form must be completed each year by the end of the second week of classes for fall or spring semester, or within one week of start for any other enrollment period.
- Parents who claim students as dependents on their Federal Income Tax form are entitled to receive grades and other information as provided by FERPA. Parents need to complete a “Parental Statement” form (Figure 18.2) during the fall semester in each year of the student’s attendance, available from and to be submitted to the Office of the Registrar. University Officials with a “legitimate educational interest” may receive all student data, including mailing labels, regardless of any restrictions, as provided by FERPA.
- “A legitimate educational interest” is an interest directly related to fulfilling Official University responsibilities or assignments of the person obtaining the information. University officials with legitimate educational interests include the following: faculty, staff persons in academic departments, academic services departments, Office of the University Registrar, Campus Safety, Student Health Services, Office of Planning and Decision Resources, Finance and admission offices, the Division of Athletics, Recreation and Wellness, the Chancellor, vice-chancellors, the Provost, vice-provosts and their staffs. It also may include those University students who are selected to serve as members of University committees that select students for membership in honor societies or University awards. However, access to education records by such students is limited to access to information directly bearing on the membership matter or award being considered by the

committee on which the student serves. Any student may request that his or her education records not be reviewed by students serving on such committees by notifying the Office of the University Registrar in writing by the end of the second week of classes for fall or spring semester, or within one week of the start for any other enrollment period.

- A student's record may be released in compliance with a court order or subpoena. The Office of the University Registrar or other official will make a reasonable effort to notify the student in advance of compliance.
- Student information may be released for health and emergency reasons.
- Students wishing to inspect their education records must complete a request form that can be obtained from the Office of the University Registrar. Upon receipt of the completed form, the University Registrar will verify that the requesting party is a student or former student. The student will then be given the form to present to the office or offices maintaining the record(s). Access will be granted within 45 days of the date that the University Registrar receives the request.
- If a student believes information contained in his or her education record is inaccurate, misleading, or otherwise inappropriate, s/he may request that the record be amended. The student may place a statement in the record commenting on the contested information or stating why s/he disagrees with the information. Whenever the University subsequently discloses the record to which the statement relates the statement will be included with the record. The student may ask for a hearing on the University's denial of any request to amend an education record.

18.4 Guidelines

In Banner, ensure the 'Confidentiality' box is checked for a student who has filed a "Request to Withhold Information" form with the University Registrar. This field is not used for any non-student records.

Figure 18.1 "Request to Withhold Information" Policy/Form

RELEASE OF INFORMATION POLICY

The Family Educational Rights and Privacy Act of 1974 (FERPA) in general provides that personally identifiable information from a student's education cannot be released without the consent of the student. One of the exceptions under the Act is information that the University has designated as "directory information." If the University has given public notice to student in attendance of:

- 1) **The types of personally identifiable information that the University has designated as directory information.**
- 2) **A student's right to refuse to let the University designate any or all of those types of information about the student as directory information; and**
- 3) **The period of time within which a student has to notify the University in writing that he or she does not want any or all of those types of information about the student designated as directory information.**

Saint Louis University has designated the items below as directory information:

Name, home and school address, home and school telephone numbers, e-mail address, date and place of birth, major field of study, participation in officially recognized activities and sports, weight and height of members of athletic teams, dates of attendance, degrees and awards received (including Dean's List), and the most recent previous educational institution attended.

You have the right to refuse to let the University designate any or all of the above types of information about you as directory information by filling out a form available from the Office of the University Registrar while you are a student, and returning it to that office in DuBourg Hall, Room 22, 221 North Grand Blvd., St. Louis, MO 63103.

The programs of Saint Louis University are open to all without regard to race, religion, age, sex or national origin. In making positive affirmation of this policy, the University is guided by both the letter and the spirit of Title IX of the Higher Education Act of 1972.

In some instances, the University may find it necessary to alter information given in this Schedule, as situations may demand.

Students are held individually responsible for the information contained in the University Catalog and Schedule of Classes. Failure to read and comply with University regulations will not exempt students from whatever penalties that may occur.

Figure 18.2 "Parental Statement" Form

2006-2007 Academic Year

Parental Waiver Statement

I certify that I am the parent or legal guardian of _____, a student at Saint Louis University. I further certify that as of this date, said student is a legal dependent of mine, and that the status of dependent is reported on my federal income tax report, (please attach a copy of the top page of the 1040 form with dependents listed). Because of this status of dependency, I understand that I may request the following record(s) under the conditions of the Family Educational Rights and Privacy Act of 1974 (Buckley Amendment). Please specify below:

A new parental statement form must be filed each August in the Office of the Registrar if you are to receive academic, financial or personal information from your student's record at Saint Louis University.

Student's Name: _____ Student's SSN #: _____

Parent's Signature: _____

Print Parent's Name: _____

Mailing Address: _____

City, State and Zip Code: _____

Phone, please include Area Code: _____

Date: _____

Please return to: Office of the Registrar
Saint Louis University
221 North Grand Blvd.
St. Louis, MO 63103

Or fax to: (314) 977-3447

19 Veteran Information

19.1 General

Veteran information is maintained by the following offices:

Human Resources	for staff and faculty
Office of University Registrar	for students

19.2 Standards

19.2.1 Veteran Category

Information is collected and maintained for regular employees by Human Resources and by the University Registrar for students. Data is entered on the PPAIDEN form in Human Resources/Payroll and on the SPAPERS form in General Person.

19.3 Guidelines

Any changes to veteran information must be coordinated with the appropriate offices as identified by checking the Banner form GUASYST.

20 Legacy Code

20.1 General

A Legacy Code identifies a relative or friend with whom Saint Louis University had or has a relationship. For example, if your mother is an alumnus of Saint Louis University, your legacy would be your mother. A person's legacy relationship status is entered on the General Person Form, SPAPERS.

20.2 Standards

The following table shows the valid values to be used at SLU:

Code	Description	Explanation
A	Aunt	Sister of parent
B	Brother	Blood brother or stepbrother
C	Cousin	Aunt or uncle's child
F	Father	Person student considers father
G	Grandparent	Mother or father of parent
M	Mother	Person student considers mother
N	Not Applicable	Not Applicable
O	Other	Other
P	Parents	When mother and father are not mutually exclusive (both mother and father attended)
S	Sister	Blood sister or stepsister
U	Uncle	Brother of parent
V	Siblings	Siblings
W	Parent &	Parent and Sibling

	Sibling	
Y	Parent & Grandparent	Parent and Grandparent
Z	Parent, Sibling & Grandparent	Parent, Sibling and Grandparent

20.3 Guidelines

Valid values are found in the validation table STVLGCY, which is shared by Student and Alumni/Advancement.

21 Religion Codes

21.1 General

The University will collect and maintain religion data.

21.2 Standards

Religion codes are stored in the Banner validation table STVRELG and are currently as follows:

AG	Assembly of God
AM	African Methodist Episcopal
AN	Anglican
BA	Bahai
BT	Baptist
BU	Buddism
CB	Church of the Brethren
CC	Church of Christ
CD	Christian (Disciples of Christ)
CG	Church of God
CH	Christian Other
CN	Church of the Nazarene
CO	Christian Orthodox
CR	Christian Reformed Church in America
CS	Christian Science
EC	Eastern Christian Orthodox
EP	Episcopal
FR	Friends
HD	Hinduism
JU	Judaism
JW	Jehovas Witnesses
LD	Latter Day Saints (Mormon)
LM	Lutheran Missouri Synod
LU	Lutheran
ME	Methodist
MM	Islam/Muslim/Moslem

Data Standards Document

MT	Mennonite
NO	None
NP	No Preference
NR	I Prefer not to Respond
OP	Other Christian/Protestant
OT	Other
PE	Pentecostal
PR	Presbyterian Church USA
R1	Society of Jesus
R2	Other Religious Order
R3	Priest (non-Religious Order)
RC	Roman Catholic
RE	Reformed Church in America
SB	Southern Baptist
SD	Seventh Day Adventist
SH	Shintoism
SO	Society of Friends (Quaker)
UC	United Church of Christ
UM	United Methodist
UT	Unitarian Universalist Assoc.
WE	Wesleyan Church
WW	Worldwide Church of God
XX	Unknown

22 Driver's License Information

22.1 General

Parking Card Services uses the driver's license field to store a randomly-generated number for generation of SLU Banner id badges.

22.2 Standards

Do not use this field. It is only for use by Parking Card Services.

23 Letter Names

23.1 General

The names of letters created within any module of Banner are stored in a common validation table called GTVLETR. Letter names are 15 characters.

23.2 Standards

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

Code	Description
AC_	1818
AD_	Alumni/Advancement
ADM_	Admissions (followed by the college code; i.e., ADM_GR)
AH_	Doisy College Health Sciences
AS_	College of Arts and Sciences
BA_	John Cook School of Business
COB_	COBRA
FA__	Financial Services
GR_	Graduate School
LP_	College of Public Service
LW_	Law
MD_	Medical School
NR_	School of Nursing
PH_	School of Public Health
PK_	Parks College
PL_	College of Philosophy and Letters
PS_	School for Professional Studies
SP_	Madrid
SW_	Social Work

24 Quickflow Names

24.1 General

The names of quickflows (predefined series of forms) created within any module of Banner are stored in a common validation table called GTVQUIK. Quickflow names are 4 characters.

24.2 Standards

There are no standards associated with Quickflows at this time.

25 APPENDIX A - Data Standards Change Request Form

25.1 General

The Data Standards Change Request Form is to be used to request changes to the Data Standards in use at Saint Louis University. The form asks for justification for the change, what other area(s) will be impacted by the change, how other area(s) will be affected, who the data steward for the proposed change will be, if applicable, and who will maintain the change, if applicable. The Process Team generating a change request must get the signature of the Data Integrity Committee (mailto: data_integrity_committee@slu.edu) member representing that module. The Data Integrity Committee will then consider the request and either incorporate the changes into the Data Standards Manual or return the request with any questions.

Standards will not be created for things we 'think' might be needed. When a need is realized, as justified by the Data Standards Change Request Form, then it will be added to the Data Standards and distributed for use.

Figure 25.1 “Data Standards Change Request Form”

SUBMITTED BY:
PROCESS TEAM:
DATE:

REQUESTED CHANGE:

JUSTIFICATION:

OTHER MODULE(S) AFFECTED:

Banner Student Financial Services Finance Human Resources

Alumni/Advancement Other

How are they affected:

WHO WILL BE THE STEWARD FOR THIS DATA?

WHO WILL MAINTAIN THIS DATA?

SUPPORT FOR CHANGE:

DATA INTEGRITY COMMITTEE MEMBER:

accepted by: _____ date: _____

name printed: _____

DATA INTEGRITY COMMITTEE RESOLUTION:

Change Accepted

Change Rejected

Further Information Needed
Explanation:

26 APPENDIX B - Shared Tables in Banner as of 06/01/2006

This appendix contains four tables:

TABLE 1: Shared Data Tables

TABLE 2: Shared Validation Tables

TABLE 3: Data Stewards for Shared Validation Tables

TABLE 4: Shared Data Items

26.1 Table 1: Shared Data Tables

Table	Description	Student	Financial Services	Alumni & Advancement	Finance	Human Resources
SPRIDEN	Identification Table	X	X	X	X	X
SPRADDR	Address	X	X	X	X	X
SPBPERS	Person Information	X	X	X	X	X
SPRTELE	Telephone	X	X	X	X	X
GOREMAL	Email	X	X	X	X	X

26.2 Table 2: Shared Validation Tables

'X' - indicates a module uses the table

'XS' - indicates the module which is the Data Steward for the table

See TABLE 3 for information on who to contact to update a table. If a table does not have a data steward identified, and you wish to establish a use for it, contact the Data Standards Committee.

Table	Description	Student	Financial Services	Alumni & Advancement	Finance	Human Resources
FTV ACCI	Account Index Code			X	XS	X
FTVACCT	Account Code			X	XS	X
FTV ACTV	Activity Code			X	XS	X
FTVCOAS	Chart of Account			X	XS	X
FTVFUND	Fund Code			X	XS	X
FTVLOCN	Location Code			X	XS	X
FTVOBUD	Budget 10 and Phase				XS	X
FTVORGN	Organization Code		X	X	XS	X
FTVPROG	Program Code			X	XS	X
GTVEMAL	Email Type	X	X	X		
GTVEXPN	Expenses	X	X	X		
GTVLETR	Letter Code	X		X		
GTVMAIL	Mail Type	X	X	X		
GTVNTYP	Name Type	X	X	X		
GTVPARA	Paragraph Code	X		X		
GTVSCOD	EDI/ISO Standard Code	X	X	X	X	X
GTVSDAX	Crosswalk	X	X	X	X	X
GTVSUBJ	Subject Index	X	X	X		
GTVZIPC	ZIP/Postal Code	X	X	X	X	X
GXRBRK	Bank Code Rule Form				XS	X
GXVDIRD	Bank Routing Number				XS	X
SOATBRK	Student Term Break Form	XS	X			
STVACCG	Activity Category	XS	X	X		X
STVACTC	Activity Code	XS		X		
STVACTP	Activity Type	XS		X		
STVACYR	Academic Year Code	XS	X	X		
STVADMT	Admission Type	XS	X			
STVAPDC	Admissions ADD Decision Codes	XS	X			
STVAPST	Admission Application Status	XS	X			
STVASCD	Room Assignment Status	XS	X			
STVASRC	Address Source	XS		X	X	
STVASTD	Academic Standing	XS	X			
STVATYP	Address Type Code	XS	X	X	X	X
STVBLDG	Building	XS	X			
STVCAMP	Campus Code	XS	X			X
STVCIPC	CIPC Code	XS				X
STVCITZ	Citizen Type Code	XS	X	X		X
STVCLAS	Class Code	XS	X			
STVCNTY	County Code	XS	X	X	X	X
STVCOLL	College Code	XS	X	X		X
STVCOMT	Committee/Service Type	XS				X
STVCTYP	Contact Type	XS	X			
STVDAYS	Days of the Week	XS	X			X

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STVDEGC	Degree Code	XS	X	X		X
STVDEGS	Degree Status	XS	X	X		
STVDEPT	Department Code	XS		X		X
STVDIVS	Division	XS	X			
STVDLEV	Degree Level	XS		X		X
STVDPLM	Diploma Type	XS	X			
STVEMPT	Employment Type	XS	X			X
STVESTS	Enrollment Status	XS	X			
STVETHN	Ethnic Code	XS	X	X		X
STVETYP	Event Type	XS				
STVGEOD	Geographic Region Division	XS		X		
STVGEOR	Geographic Region Code	XS		X		
STVGMOD	Grading Mode Code	XS	X			
STVHAPS	Housing Application Status	XS	X			
STVHLDD	Hold Type	XS	X			
STVHOND	Departmental Honors Code	XS	X	X		X
STVHONR	Institutional Honors Code	XS		X		
STVINIT	Initials Code	XS		X		
STVLANG	Language	XS				X
STVLEAD	Leadership	XS		X		
STVLEVL	Level Code	XS	X			X
STVLGCY	Legacy	XS		X		X
STVMAJR	Major/Minor/Concentration Code	XS	X	X		X
STVMDEO	Medical Equipment Code	XS				X
STVMEDI	Medical Code	XS				X
STVMRCD	Meal Rate	XS	X			
STVMRTL	Marital Status Code	X	X	X		XS
STVMSCD	Meal Assignment Status	XS	X			
STVNA TN	Nation Code	XS	X	X	X	X
STVORIG	Originator Code	XS		X		
STVPENT	Port of Entry Code	XS				X
STVRATE	Student Fee Assessment Code	XS	X			
STVRDEF	Building/Room Attribute	XS	X			
STVRELG	Religion Code	XS		X		X
STVREL T	Relation Code	X				XS
STVRMST	Room Status	XS	X			
STVRRCD	Room Rate	XS	X			
STVRSTS	Course Registration Status	XS	X			
STVSBGI	Source/Background Institution	XS	X	X		X
STVSITE	Site	XS	X			
STVSPON	International Student Sponsor	XS	X			
STVSTAT	State/Province Code	XS	X	X	X	X
STVSTST	Student Status	XS	X			
STVT ADM	Test Score Administration Type	XS	X			
STVTELE	Telephone Type	XS	X	X	X	X
STVTEPR	Test Purpose	XS	X			
STVTERM	Term Type	XS	X			
STVTESC	Test Code	XS	X			
STVTSRC	Admission Test Score Source	XS	X			
STVVETC	Veteran Type	XS	X			
STVVITYP	VISA Type	XS				X
STVWDRL	Student Withdrawal Status Codes	XS	X			
TSACONT	Contract Authorization Form	XS	X			
TSADETC	Detail Code Control Form	XS	X			

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Table	Description	Student	Financial Aid	Alumni & Advancement	Finance	Human Resources
TSAEXPT	Exemption Authorization Form	XS	X			
TVVAUTH	Authorization Validation Form	XS	X			
TTVBILL	Billing Code	XS	X			
TTVDCAT	Detail Category	XS	X			
TTVPAYT	Payment Type	XS	X			
TTVSRCE	Charge/Payment Detail Source	XS	X			
GURAPAY	Finance Feed AP Table	X			XS	X
GURFEED	Finance Transaction Input Table	X			XS	X

26.3 Table 3: Data Ownership of Banner Tables

This table indicates the specific department acting as the Data owner for a Shared Validation Table and who to contact to request a change. The Data owner of that table will work with the department requesting the change and the Data Integrity Committee to evaluate the requested change and, if approved, update the table.

If the Data Integrity Committee is indicated as the 'Data Owner', that means the table is not currently in use, or is used by multiple areas equally. Contact a member of the Committee to initiate use of such a table.

Table	Description	Data Owner
FTVACCI	Account Index Code	Finance
FTVACCT	Account Code	Finance
FTVACTV	Activity Code	Finance
FTVOCAS	Chart of Account	Finance
FTVFUND	Fund code	Finance
FTVLOCN	Location Code	Finance
FTVOBUD	Budget ID and Phase	Finance
FTVORGN	Organization Code	Finance
FTVPROG	Program Code	Finance
GTVEMAL	Email Type	Registrar's Office
GTVEXPN	Expenses	Data Integrity Committee
GTVMAIL	Mail Type	Data Integrity Committee
GTVNTYP	Name Types	Data Integrity Committee
GTVSCOD	EDI/ISO Standard Code	International Office
GTVSDAX	Crosswalk	Data Integrity Committee
GTVSUBJ	Subject Index	Data Integrity Committee
GTVZIPC	ZIP/Postal Code	Registrar's Office
GXR BANK	Bank Code Rule Form	Finance
GXDIRD	Bank Routing Number	Finance
SOATBRK	Student Term Break Form	Registrar's Office
STVACCG	Activity Category	Data Integrity Committee
STVACTC	Activity Code	Data Integrity Committee
STVACTP	Activity Type	Data Integrity Committee
STVACYR	Academic Year Code	Registrar's Office
STVADMT	Admission Type	Admissions
STVAPDC	Admission APP Decision Codes	Admissions
STVAPST	Admission Application Status	Admissions
STVASCD	Room Assignment Status	Housing
STVASRC	Address Source	Admissions
STVASTD	Academic Standing	Registrar's Office
STVATYP	Address Type Code	Registrar's Office
STVBLDG	Building	Registrar's Office/ Housing
STVCAMP	Campus Code	Registrar's Office
STVCIPC	CIPC Code	Registrar's Office
STVCITZ	Citizen Type Code	Admissions
STVCLAS	Class Code	Registrar's Office
STVCNTY	County Code	Registrar's Office
STVCOLL	College Code	Registrar's Office
STVCOMT	Committee/Service Type	Data Integrity Committee
STVCTYP	Contact Type	Admissions

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STVDAYS	Days of the Week	Registrar's Office
STVDEGC	Degree Code	Registrar's Office
STVDEGS	Degree Status	Registrar's Office
STVDEPT	Department Code	Registrar's Office
STVDIVS	Division	Registrar's Office
STVDLEV	Degree Level	Registrar's Office
STVDPLM	Diploma Type	Registrar's Office
STVEMPT	Employment Type	International Office
STVESTS	Enrollment Status	Registrar's Office
STVETHN	Ethnic Code	Admissions
STVETYP	Event Type	Data Integrity Committee
STVGEOD	Geographic Region Division	Admissions
STVGEOR	Geographic Region Division	Admissions
STVGMOD	Grading Mode Code	Registrar's Office
STVHAPS	Housing Application Status	Housing
STVHLDD	Hold Type	Registrar's Office
STVHOND	Departmental Honors Code	Registrar's Office
STVHONR	Institutional Honors Code	Registrar's Office
STVINIT	Initials Code	Admissions
STVLANG	Language	International Office
STVLEAD	Leadership	Data Integrity Committee
STVLEVL	Level Code	Registrar's Office
STVLGCY	Legacy	Admissions
STVMAJR	Major/Minor/Conc, Code	Registrar's Office
STVMDEQ	Medical Equipment Code	Registrar's Office
STVMEDI	Medical Code	Registrar's Office
STVMRCD	Meal Rate	Housing
STVMRTL	Marital Status Code	Human Resources
STVMSCD	Meal Assignment Status	Housing
STVNATN	Nation Code	Data Integrity Committee
STVORIG	Originator Code	Data Integrity Committee
STVPENT	Port of Entry Code	Data Integrity Committee
STVRATE	Student Fee Assessment Code	Student Business Services
STVRDEF	Building/Room Attribute	Registrar's Office/Housing
STVRELG	Religion Code	Data Integrity Committee
STVRELT	Relation Code	Human Resources
STVRMST	Room Status	Registrar's Office/Housing
STVRRCD	Room Rate	Housing
STVRSTS	Course Registration Status	Registrar's Office
STVSBGI	Source/Background Institution	Undergraduate Admissions (for high schools and universities) Graduate School Admissions (for Intl universities)
STVSITE	Site	Registrar's Office
STVSPON	International Student Sponsor	Admissions
STVSTAT	State/Province Code	Data Integrity Committee
STVSTST	Student Status	Registrar's Office
STVTADM	Test Score Administration Type	Admissions
STVTELE	Telephone Type	Data Integrity Committee
STVTEPR	Test Purpose	Admissions
STVTERM	Term Type	Registrar's Office
STVTESC	Test Code	Admissions

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STVTSRC	Admissions Test Score	Admissions
STVVETC	Veteran Type	Registrar's Office
STVVITYP	VISA Type	International Office
STVWDRL	Student Withdrawal Status	Registrar's Office
TSACONT	Contract Authorization Form	Student Financial Services
TSADETC	Detail Code Control Form	Student Financial Services
TSAEXPT	Exemption Authorization Form	Student Financial Services
TVVAUTH	Authorization Validation Form	Student Financial Services
TTVBILL	Billing Code	Student Financial Services
TTVDCAT	Detail Category	Student Financial Services
TTVPAYT	Payment Type	Student Financial Services
TTVSRCE	Charge/Payment Detail Source	Student Financial Services
GURAPAY	Finance Feed AP Table	Finance
GURFEED	Finance Transaction Input Table	Finance

26.4 Table 4: Shared Data Items

Item	HR Used on:	Student Used on:	Fin. Services Used on:	Finance Used on:	Alumni Used on:	Rule/Val. Table
ID Number	PPAIDEN	SPAIDEN		FOAIDEN	APAIDEN	None
Name Information	PPAIDEN	SPAIDEN	RPAIDEN	FOAIDEN	APAIDEN	None
Name Type	PPAIDEN	SPAIDEN	RPAIDEN	FOAIDEN	APAIDEN	GTVNTYP
SSN	PPAIDEN	SPAPERS	ROAPERS	FOAPERS	APAPERS	None
Date of Birth	PPAIDEN	SPAPERS	ROAPERS	FOAPERS	APAPERS	None
Ethnicity	PPAIDEN	SPAPERS	ROAPERS	FOAPERS	APAPERS	STVETHN & PTRETHN
Gender	PPAIDEN	SPAPERS	ROAPERS	FOAPERS	APAPERS	None - Fixed at M, F, N
Marital*	PPAIDEN	SPAPERS	ROAPERS	FOAPERS	APAIDEN	STVMRTL
Citizenship	PPAIDEN	SPAPERS	ROAPERS	FOAPERS	APAPERS	STVCITZ
Deceased Information	PPAIDEN	SPAPERS	ROAPERS	FOAPERS	APAPERS	None
Address Information*	PPAIDEN	SPAIDEN		FOAPERS	APAIDEN	None
Address Type	PPAIDEN	SPAIDEN		FOAIDEN	APAIDEN	STVATYP
Address Sequence	PPAIDEN	SPAIDEN		FOAIDEN	APAIDEN	None
Address Lines	PPAIDEN	SPAIDEN		FOAIDEN	APAIDEN	None
Address City	PPAIDEN	SPAIDEN		FOAIDEN	APAIDEN	None
Address County	PPAIDEN	SPAIDEN		FOAIDEN	APAIDEN	STVCNTY
Address State	PPAIDEN	SPAIDEN		FOAIDEN	APAIDEN	STVSTAT
Address Zip	PPAIDEN	SPAIDEN		FOAIDEN	APAIDEN	GTVZIPC
Address Nation	PPAIDEN	SPAIDEN		FOAIDEN	APAIDEN	STVNATN
Address Source	PPAIDEN	SPAIDEN		FOAIDEN	APAIDEN	STVASRC
Phone Information	PPAIDEN	SPAIDEN		FOAIDEN	APAIDEN	None
Phone Type	PPAIDEN	SPAIDEN		FOAIDEN	APAIDEN	STVTELE
Veterans Information	PPAIDEN	SPAPERS	ROAPERS	FOAPERS	APAPERS	None
Legacy Code	PPAIDEN	SPAPERS	ROAPERS	FOAPERS	APAPERS	STVLGCY
Religion Code	PPAIDEN	SPAPERS	ROAPERS	FOAPERS	APAPERS	STVRELG
Confidentiality Indicator	PPAIDEN	SPAPERS			APAPERS	None
Emergency Contact Information*	PPAIDEN	SPAEMRG				None
Emergency Contact Relationship	PPAIDEN	SPAEMRG				STVRELT
General-Information	PPAGENL	SOAPCOL				None
General Source	PPAGENL	SOAPCOL			APAADEG	STVSBGI
General-Degree Code	PPAGENL	SOAPCOL			APAADEG	STVDEGC
General-Majors		SOAPCOL			APAADEG	STVMAJR
General-Minors		SOAPCOL			APAADEG	STVMAJR

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General-Concentrations		SOAPCOL			APAADEG	STVMAJR
General-Official Transcript	PPAIDEN	SOAPCOL				None
Telephone Information	PPATELE	SPATELE		FOATELE	APATELE	None
Telephone Type	PPATELE	SPATELE		FOATELE	APATELE	STVTELE
Medical Information	PPAMEDI	SPAMEDI				None
Medical. Code	PPAMEDI	SPAMEDI				STVMEDI
Medical - Equipment	PPAMEDI	SPAMEDI				STVMDEQ
Medical - Disability Type		SPAMEDI				STVDISA
Medical - Disability Service Type		SPAMEDI				STVSPSR
International - Information	GOAINTL	GOAINTL				None
International. Visa Type	GOAINTL	GOAINTL				STVVVYP
International - Entry Visa Type	GOAINTL	GOAINTL				STVVVYP
International - Port of Entry	GOAINTL	GOAINTL				STVPENT
International - Birth Nation	GOAINTL	GOAINTL				STVNATN
International - Citizen Nation	GOAINTL	GOAINTL				STVNATN
International. Language	GOAINTL	GOAINTL				STVLANG
International - Foreign Tax ID	GOAINTL	GOAINTL				None
International - Sponsor	GOAINTL	GOAINTL				STVSPON
International. Employment Type	GOAINTL	GOAINTL				STVEMPT
International - Other Information	GOAINTL	GOAINTL				None
International - I-20 Information	GOAINTL	GOAINTL				None
Email*	GOAEMAL	GOAEMAL		GOAEMAL	APAEMAL	GTVEMAL
Tenure Code	PEAFAC	SIAFPER				
Tenure Date	PEAFAC	SIAFPER				

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Review Date	PEAFAC	SIAFPER				
AAUP Membership	PEAFAC	SIAFPER				
Years Experience	PEAFAC	SIAFPER				
Sabbatical Dates	PEAFAC	SIAFPER				
Academic Title	PEAFAC	SIAFPER				
Degree Institution	PPAGENL	SIAFDEG				
Transcript Dates	PPAGENL	SIAFDEG				
Degree (type)	PPAGENL	SIAFDEG				
Year (degree)	PPAGENL	SIAFDEG				
GPA	PPAGENL	SIAFDEG				
Hours	PPAGENL	SIAFDEG				
Area of Concentration	PPAGENL	SIAFDEG				
Faculty FTE	PEAFACL	SIAASGN				
Position	PEAFACL	SIAASGN				
Suffix	PEAFACL	SIAASGN				
* Indicates ability to change data through Self-Service..						

27 APPENDIX C – Non-Person Abbreviations

Organization	Abbreviation	Organization	Abbreviation	Organization	Abbreviation
Academy	Acdmy	Equipment	Equip	Office	Ofc
Accounting	Acctg	Executive	Exec	Organization	Orgn
Administration	Admin	Extension	Ext	Organizational	Orgnl
Advertising	Advtsng	Federal	Fed	Processing	Proc
Agency	Agcy	Finance	Fin	Publishing	Pubshng
American	Amer	Foundation	Fnd	Regional	Regl
Appraiser	Apprser	General	Gen	Service	Serv
Architect	Archt	Government	Govt	Services	Servs
Associate	Assoc	Greater	Grtr	Society	Soc
Association	Assn	Group	Grp	Standard	Stand
Attorney	Atty	Hospital	Hosp	Student	Stdnt
Board	Bd	Hotel	Htl	Technology	Tech
Center	Ctr	Incorporated	Inc	United	Untd
Central	Ctrl	Information	Info	University	Univ
Certified	Cert	Institute	Inst	Wholesaler	Whslr
Collegiate	Colg	Institution	Instn		
Community	Cmnty	Insurance	Ins		
Company	Co	International	Intl		
Computer	Cmptr	Journal	Jrnl		
Contractor	Contr	Limited Liability Company	LLC		
Cooperative	Coop	Laboratory	Lab		
Corporation	Corp	Library	Lbry		
Council	Cncl	Limited	Ltd		
County	Cnty	Management	Mgmt		
Department	Dept	Manager	Mgr		
Director	Dir	Manufacturing	Mfg		
Distributing	Distr	Marketing	Mktg		
Division	Div	Material	Matl		
Education	Educ	Metropolitan	Metro		
Emergency	Emer	National	Natl		

28 APPENDIX D – Student Reports Naming Standards

REPORT NAMING STANDARDS

SLU ID (Primary Report ID)
First Name
Last Name
Middle Initial
Full Name
Street Line 1
Street Line 2
Street Line 3
City
State/Province
Zip Code
Nation (Address)
Area Code
Phone Number
Phone Ext
Pager Area Code
Pager Number
Pager Ext
SLU E-mail Address
Other E-mail Address
Phone Number (Type)
Student Classification
Student Type
Student Level
College(s) (for term selected)
Term
Part of Term
Campus
Primary Major
Secondary Major
Primary Minor
Secondary Minor
Primary Degree
Secondary Degree
Primary Concentration
Secondary Concentration
Third Concentration
Certificate(s)
Department Code
Student Attribute(s)
Program(s)
Advisor E-mail

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Advisor First Name
Advisor Last Name
Advisor Name
Advisor Effective Term
Advisor Code
Advisor Primary Indicator
Advisor SLU ID
Registration PIN
Registration PIN Term
Gender
Ethnicity
Current GPA
Current Attempted Hours
Cumulative GPA
Cumulative Earned Hours
Enrolled
Registered
Subject Code
Course Number
CRN
Section Number
Course Title
Grade
Course Rank
NCAA Sport
Course Instructor
Birth Date