



Sul Ross State University

Banner Data Standards & Guideline for University Data Standards



Banner Data Standards

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Banner Data Standards

Version 1.6

Banner Data Standards & Guideline for University Data Standards

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1. Data Integrity

1.1 Purpose

These guidelines provide recommendations for establishing measures for the protection, access, and use of SRSU data that is electronically maintained on the Banner ERP system and on all satellite systems which interface with Banner. The guidelines define the responsibilities of users who input and access that data. Divisions/departments may have individual guidelines that supplement, but do not replace or supersede these guidelines.

1.2 Administrative Responsibility

By law, certain data is confidential and may not be released without proper authorization. Users **MUST** adhere to any applicable federal and state laws as well as SRSU policies and procedures concerning storage, retention, use, release, and destruction of data. These policies are outlined in the SRSU catalog, under "Privacy Rights" and in the Administrative Policy Manual (see Chapter Two).

Students' records are protected by the Family Educational Rights and Privacy Act of 1974 (FERPA). Access to these records is restricted to those with an "educational need to know" or those who have the express consent of the student. This protection does not expire when a student leaves SRSU. In addition, FERPA allows for certain information to be defined as "directory information". This information may be publicly released, unless the student requests nondisclosure (or "privacy hold"). At SRSU, "directory information" includes; the student's name, all addresses (including email) and telephone listings, major field of study, number of hours registered and full or part-time status, class standing (freshman, sophomore, junior, senior, graduate), participation in officially recognized activities and sports, weight and height of members of athletic teams, dates of attendance, degrees awarded and total hours earned, special honors and awards, and the most recent previous educational agency or institution attended by the student.

Data is a vital asset owned by SRSU. All institutional data, whether maintained in the central database or copied into other data systems (e.g. personal computers) remains the property of SRSU. Access to data is not approved for use outside a user's official SRSU responsibility. Data will be used only for legitimate SRSU business. Information is not to be distributed beyond a user's office without authorization by the appropriate administrator or supervisor. Distribution beyond the university requires permission of the corresponding data custodian(s).

Sensitive information which resides on desktop or portable machines should be encrypted or password protected to prevent access and distribution. (See requirements in Appendix 6: The University Information Security Form.)

As a general principle of access, the SRSU data (regardless of who collects or maintains it) will be shared among those employees whose work can be done more effectively by knowledge of such information.

Although SRSU must protect the security and confidentiality of data, the procedures allow access to data must not unduly interfere with the efficient conduct of SRSU business. Individuals working remotely must take special care to maintain security. The intended use is always temporary and must never be permanently stored.

Individuals with administrative or supervisory responsibilities will ensure that, for their areas of accountability, each user is trained regarding user responsibilities. **As part of that training, each user will read, understand, and agree to abide by the stipulations in this document. Users further agree to remain current with any changes. Changes will be sent to all users who have signed the acknowledgement form to ensure users remain current with data standards information.**

Individuals with administrative or supervisory responsibilities will ensure a secure office environment with regard to all SRSU data systems. Individuals with administrative or supervisory responsibilities will determine the data access requirements of their staff as it pertains to their job functions based upon classification before submitting an Access Request Form. See discussion of roles in Section 1.5.

All procedures and data systems owned and operated by SRSU will be constructed to ensure that:

1. Accuracy, completeness and consistency of all data are maintained.
2. System capabilities can be re-established after loss or damage by accident, malfunction, breach of security, or natural disaster.
3. Breaches of security can be controlled and promptly detected.
4. All critical data is archived.

1.3 Access to SRSU Data

Below are the requirements and limitations for all SRSU divisions/departments to follow when obtaining permission for inquiry and update access to SRSU's institutional data. All users must understand that data security and accuracy is every user's responsibility.

Users are responsible for understanding all data elements that are used. If a user does not understand the meaning of a data element, the user should consult his/her supervisor or the appropriate Data Owner (see the Data Owner section). Users must protect all SRSU data files from unauthorized use, disclosure, alteration, or destruction. **Users are responsible for the security, privacy, and management of data within their control. Users are responsible for all transactions occurring during the use of their login identification (ID) and password.** Users are not to loan or share access codes with anyone. If it is found that a user is loaning or sharing their access codes, he or she is subject to disciplinary action, up to and including termination. With the exception of system administrator access, no global accounts will be permitted.

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Individuals with administrative or supervisory responsibilities must request access authorization for every user under their supervision by completing and submitting a SRSU Application for Security Access form to the appropriate Data Owner. The SRSU Application for Security Access form and instructions is contained in Appendix 8. The user's signature on the Access Request Form signifies his/her agreement to abide by all data standards.

For individuals that require ODBC access to Banner data in their job duties, an individual with administrative or supervisory responsibilities must request access by completing and submitting a SRSU Application for ODBC Security Access form to the appropriate Data Owner. The SRSU Application for ODBC Security Access form and instructions is maintained in The Office of the CIO. The user's signature on the SRSU Application for ODBC Security Access Form signifies his/her agreement to abide by all data standards. Additionally, each user requesting ODBC access must demonstrate knowledge of the data they are requesting access to, as well as familiarity of databases, database structures and proper methods of creating queries before access is approved. The process for granting or denying ODBC access follows the same steps as the Application for Security Access contained in Section 8 of this document. The following additional requirements must be adhered to for all ODBC access privileges:

1. When the access is no longer needed, it the responsibility of the supervisor to notify the Data Owner of the need to terminate this database access.
2. Individuals with database access are required to fill out a new form each year and re-verify their need for the access, the tools used in this process, as well their current standing as to skills and knowledge on how to handle the data and this access.
3. Desktop tools for creating and running queries are a matter of personal preference. However, in order to ensure tools meet a minimum standard of quality and usability as determined by OIT, any tools used in connecting to the database must meet the approval of the CIO or his/her designee. Examples of tools that are currently acceptable include: TOAD, SQLDeveloper, SAS and MS Access.

The Data Owner will review the request and may approve or deny the request. Once the request is approved, the request form will be forwarded to OIT via a LTAC ticket for processing.

The Data Owner will work together with Human Resources in order to make access to Banner, its satellite systems and other resources as smooth as possible for new employees. Greater access to Banner generally will be obtained only after appropriate training.

If a user is denied access to the system by the Data Owner, the user can appeal the decision by writing a request for review of the decision to the Data Owners Committee. The request for review should be sent to the Chief Information Officer (CIO) and includes the following information:

1. A copy of the completed SRSU Application for Security Access form.
2. Justification for access to the data.
3. The name of the Data Owner who denied the request and the reason(s) why.

Within two business days, the CIO will contact the Data Owner for any additional information why access was denied. Within 3 additional business days, the CIO will call a meeting of the Data Owners Committee, who will consider the information and either uphold the Data Owner's decision or overrule it and permit access. The Data Owners Group's decision will be final. The written decision and justification will be permanently kept in the Data Owner's folder in the campus imaging system. Copies will be forwarded to the user, their supervisor and the Data Owner.

1.4 Information Access Definitions

"Inquiry-only" access enables the user to view, analyze, but not change, SRSU data. If data is downloaded to a personal computer or other device that data may be formatted must not be altered. Downloaded data must be used and represented responsibly and accurately. If any data is downloaded for the purpose of generating reports, the report must be clearly labeled as "unofficial", except as authorized by the Data Custodian. "Update" access provides both inquiry and update capabilities. Update capability is generally limited to users directly responsible for the collection and maintenance of the data.

1.5 Secured Access to Data

Banner roles (classifications) will be established based on job function such as registration clerk, faculty, cashier, etc. Specific capabilities will be assigned to each classification. For example, the registration clerk would have update access to registration, but only inquiry to student accounts. Each user will be assigned a classification or possibly several classifications, depending on their particular needs as established by their division/department head or his/her designee or approved by the Data Custodian(s).

A list of available Banner classes and their functions will be made available on-line. This list will be a dynamic document that will not be given out in hardcopy form to ensure that everyone has access to the most current list. Changing classes may alter access.

The following procedures will be used to establish an ID and password for the Banner ERP System:

1. The employee will participate in Banner training. Basic navigation training is the responsibility of the employee and may be obtained either through on-line tutorial or during regularly scheduled sessions. Knowledge of basic navigation is a prerequisite for position-related training. **At the completion of training, the Banner Trainer will send a memo with the trainer's signature or email to the Banner Security Administrator indicating who has complete what type of training. The trainer will give the employee an Access Request Form** to be filled out by the employee's division/department head or designee.
2. All fields are required on the Access Request Form in order to receive a Banner Account. After the employee's division/department head or designee has determined the appropriate roles the user is to be assigned, has approved the access and completed the form, the form is sent to the Data Custodian(s) for approval. Data Custodians do not need an authorizing signature for access to their own data. **The Data Custodian sends the Access Request Form to the Banner Security Administrator.**
3. New employees must sign-off stating that they have read the Data Standards document. This will reside in their personnel file.

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4. The Security Administrator creates a unique Banner Account for the employee and adds the account information to GUAIDEN. In the case an account already exists, new authorizations will be added.
5. The Security Administrator notifies the employee of his/her Banner Account. Immediately upon login, the employee will need to change the password on GUAPSWD. **Passwords must be a minimum of 6 characters and must contain two or more numbers and/or special characters.** For complete guidelines on Banner passwords, see the Banner Web site at www.sulross.edu/page/1201/banner
6. If a user forgets his/her password, he/she must contact the Helpdesk and provide appropriate identification. Since the passwords are encrypted, the Helpdesk cannot read the old password and must issue a new one. A user's current password may be obtained through the central help desk.
7. Upon separation of employment, all access to Banner and related systems ceases immediately. Continuation of certain services may remain for retirees. It is the responsibility of Human Resources to notify the system administrator of separations.
8. Account security policies and procedures shall be consistent with the University Security Form (Appendix 6), the University Administrative Policy Manual and the T SUS Regent's Rules.
9. Security concerns should be reported to the Chief Information Officer who will evaluate the risk, investigate as needed and act in accordance with university policy.

1.6 SRSU Data Owners and Areas of Responsibility

Data Owners are those who, by virtue of their position at SRSU, have the authority and responsibility for the security, accuracy and confidentiality of data within their areas of account ability. In their role, Data Owners ensure the safety and reliability of data within their area of expertise through the management of users, security groups and classes, by granting inquiry or modify access, and by defining and improving business processes. The responsibility for maintaining and controlling Banner validation and rules tables also resides with the Data Owners for each respective area of Banner.

Area of Responsibility	Data Owner
Advancement	Advancement Database Manager
Finance	Controller
Financial Aid	Director of Financial Aid
Human Resources/Payroll	Director of Human Resources
Student	Registrar
Banner General	CIO

1.7 SRSU Data Custodians and Areas of Responsibility

In consultation with the Data Owners, OIT provides information asset services to both owners and users and is designated by the owner to be the operational entity that implements the procedures and controls that provide the appropriate protection for information resources. Custodians of information resources, including third party entities providing outsourced information resources services to state institutions of higher education shall (see TAC 202.72 (2)):

- a. Implement controls required to protect information and information resources required by this chapter based on the classification and risks specified by the information owner(s) or as specified by the policies, procedures, and standards defined by the institution of higher education information security program;
- b. Provide owners with information to evaluate the cost-effectiveness of controls and monitoring;
- c. Adhere to monitoring techniques and procedures, approved by the ISO, for detecting, reporting, and investigating incidents;
- d. Provide information necessary to provide appropriate information security training to employees; and
- e. Ensure information is recoverable in accordance with risk management decisions.

Area of Responsibility	Data Custodian
Admissions	AVP of Enrollment Management
Purchasing	Director of Purchasing
Budgeting	VP for Business Affairs
Student	Director of Admissions Records

2. Data Change Rules

The following rules govern which office makes name, identification number, date of death, address, and/or telephone number (shared general person) changes to student, employee, financial aid recipient, vendor, or alumni records in the integrated administrative information system. Users must take care when updating information, such as adding a new address, to end-date the previous entry. Changes should all be documented. Relevant documents should be archived in the ImageNow System

If the person is a/an:	With appropriate documentation then the change can be made by:
Employee or Employment Applicant	Human Resources
Student, Student Recruit or Student Applicant	Admissions, Recruiting, Financial Aid or Registrar
Vendor	Purchasing
Alumni, Donor & Outside Constituents	Advancement

2.1 Rules for Clean and Accurate Records

- **Search first.** Before you create a new record for a person or organization, you must conduct an ID and name search to make sure that person or organization has not already been entered in the Banner database. Each user in every office must conduct a thorough search to prevent entering a duplicate record.
- **Duplicate records.** A duplicate record usually cannot be removed. Known duplicate records present within the system can be identified by the Last Name field containing

DO NOT USE --- USE <name> and a period in the First Name field. In addition, on the *current name record* one will find NAME TYPE = DUPL.
- **Duplicate resolution procedure.** In the event you have identified a duplicate, report this fact to the data custodian. *Under no circumstances should you attempt to correct the records.* The custodian will convene a meeting of appropriate parties to determine the course of action. It is recommended that all information be deleted from a record marked as “DO NOT USE.”
- **Data changes.** Make data changes only when you have that authority and when you follow the procedures established by the Data Custodian of that data you want to change.
- **Remember** – some data fields have specific data entry rules. See the specific section under General Person Information for those data entry rules.
- The pound sign (#) and percent sign (%) should not be used in any data field because they may cause Oracle database errors.

2.2 Data required for new records

The minimum data necessary to create a new entity (person or organization) in the Banner system is a name (System creates the unique ID). Contact information is mandatory. This is at least one of the following.

- Postal address
- Email address

- Telephone number

However, to meet data needs and to ensure data integrity and accurate record keeping, it is most beneficial to have some of the following components for persons as well:

- Gender
- Birth date
- Social security number
- Race
- Citizenship or visa status

Other areas may have their own requirements

3. General Person Information

The following guidelines should be adhered to for all person records added to the Banner system. **Note that the following offices can create new records: Advancement, Human Resources, Purchasing, Admissions, Registrar and Financial Aid.**

3.1 Person name searches (*Note: Add appropriate information. common matching tool.*)

Before you create a new record for a person or organization, you must conduct an ID and name search to insure the person or organization has not been created previously in the Banner database. All employees must conduct a thorough search to prevent the creation of a duplicate 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 duplication of duplicates.

- Type in the name to be searched using the % (wildcard) to broaden the search. For example, to find John McDonald one can query as "McDonald" or "Mc Donald" or " M%c%Donald." This latter would return McDonald, MacDonald, Mc Donald, Mac Donald, among potentially others.
- When the list of possible names is returned for a person, use other information to restrict the search (gender, birth date, SSN, ID number, etc.). Remember to search for both full and common versions of names – for example, William and Bill.
- Remember to search using the middle name field. For example, to find J. Richard Smith search for Richard in the Middle name field.
- *The safest way to search on name is to include the wildcard at the beginning and at the end of the name entered.*

3.2 Identification Number Standards

The following identification numbers will be used:

Person Use the identification number generated by the system on any Identification Form (xxxIDEN).
 The SSN should be entered on the General Person Form (xxxPERS).

Non-Person Use the system generated ID number. (Non-persons include corporations, LLC's, P C's, etc.

The generated ID will be a nine character alpha-numeric string beginning with the letter A and followed by eight numbers (e.g., A00010001)

3.3 Name Standards

In all cases the full legal name should be recorded as the **current name**. The official forms of all data collection instruments used by the university should encourage the use of the full legal name, that is, first, middle and last names written in full. For all employees and recipients of financial aid, this must be the name as it appears on the individual's Social Security card. Given that persons have maintained the appropriate updates with other agencies, the legal person name and the social security card name should be the same. Required federal reporting to the Department of Education, the Internal Revenue Service, and other federal and state agencies require that persons provide their social security number and social security card name.

Informed professional judgment must be used to determine what constitutes a name correction rather than a name change. In a name correction, the current name is "typed over," no previous or alternate name record is kept and no documentation is required.

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

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Person/Non-person	Procedures
Employee (faculty/staff/student worker) – whether or not any other record type exists.	Human Resources will make the change except for student employees. Student records are changed by Student Employment. Use Name Change Form and require presentation of Social Security Card. A Passport or Social Security Application Receipt is required for non-US citizen student workers only. See Name Change Form for procedures.
Student. Current employees and current student employees must follow the procedure above.	University Registrar or Advancement, if the student is an alumnus, 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.
Accounts Payable Vendors	Purchasing staff will make change if no other record exists for the vendor. If a donor, Advancement will consult with Purchasing.
Admission recruit or applicant, not a current	Registrar, Admissions office or Financial Aid may change upon request of individual.
Alumni or constituent (no current employee record type exists)	Advancement will make change upon request of constituent. Advancement may create a new Current name based upon a newspaper announcement or similar record only if this new name is verified through property, voter or credit records. Otherwise the new name must be stored in an alternate field.

3.3.1 LastName

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

Hyphens may be used to separate double last names (sometimes used in ethnic names or by persons who wish to utilize their maiden and married names). Some judgment must be used to appropriately parse names. In general, if there are two last names that are not hyphenated (e.g. Monica Lou Creton Quinton), Monica would be input as the first name, Lou would be input as the middle name and Creton Quinton would be input as the last name.

Spaces are permitted if the legal spelling and format of the name includes spaces. Examples: Mc Donald, Mac Phearson, St John, Del la Rosa, Van der Linder.

Only hyphenation should be entered (no comma, periods or other punctuation). No spaces should appear before or after a hyphen.

Do NOT use titles, prefixes, and suffixes in the last name.

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

Note: When a new person is being entered into Banner and that new person has a previous name that is deemed necessary to be recorded, enter the previous name into the system first and commit the record. Now enter the current name and commit the record. The previous name will now appear in the previous identification block.

3.3.2 First Name

All information is to be entered using mixed case (standard combination of upper and lower case letters). Enter the legal spelling and format of the first name as supplied by the person. If no first name exists put a period in this field.

Employees must have a full first name. Never enter nicknames as a first name. Any single character first name should be entered and followed by a period. In those cases where a single character first name is designated as the first name and followed by a middle name, place the single character in the first name field and the middle name in the middle name field.

Only hyphenation should be entered (no comma, periods or other punctuation). Hyphens may be used to separate double first names. No spaces should appear before or after a hyphen.

Spaces are permitted if the legal spelling and format of the name includes spaces (e.g. Mary Ann, Bobby Joe).

Do NOT use titles, prefixes, or suffixes in the first name field.

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

3.3.3 Middle Name

All information is to be entered using mixed case (standard combination of upper and lower case letters). Enter the full legal middle name or, if not available, the middle initial as supplied by the person. If no middle name exists, leave the field blank.

Only hyphenation should be entered (no comma, periods or other punctuation). Hyphens MAY be used to separate double middle names. No spaces should appear before or after a hyphen.

Spaces are permitted if the legal spelling and format of the name includes spaces.

Do NOT use titles, prefixes, or suffixes in the middle name field.

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

3.3.4 Prefixes

The default for this field is blank. Enter a prefix only if requested or provided. Prefixes are to be entered using mixed case (standard combination of upper and lower case letters). Enter the prefix in the prefix field, not in the first, middle, or last name fields. A professional prefix cannot appear with a professional suffix. Below are examples of the more commonly used prefixes and required abbreviations.

Consult Appendix 1 for a more extensive guide to prefixes, suffixes and salutations.

Abbreviation	Description
Mr.	Mister
Mrs.	Madam/Missus
Ms.	Miss
Dr.	Doctor
Hon.	Honorable
Rev.	Reverend
Sr.	Sir
Fr.	Priest/Father
Bro.	Brother

3.3.5 Suffixes

The default for this field is blank. Enter values only if requested or provided. All suffix codes are to be entered using mixed case (standard combination of upper and lower case letters). Enter the suffix in the suffix field, not in the last name field. Below are examples of commonly used suffixes and recommended abbreviations. The suffix field is not included on printed payroll checks and tax reports. Consult Appendix 1 for a more extensive guide to prefixes, suffixes and salutations.

<u>Abbreviation</u>	<u>Description</u>
Sr.	Senior
Jr.	Junior
II	The Second
III	The Third
PhD	Doctor of Philosophy

3.3.6 Name Types [GTVNTYP]

Current names are not associated with a name type. Previous or alternate names should be associated with the appropriate name type. (This field does not display on Human Resources forms)

<u>Abbreviation</u>	<u>Description</u>
Birth	Birth or Maiden Name
CORR	A corrected name
DBA	Doing business as
DUPL	Reserved for identification of duplicates
LGCY	Legacy. For conversation only. DO NOT USE.
MRRD	Married
NICK	Nickname
NSTD	Name of student
PREV	Previous name
PROF	Professional

3.3.7 Preferred (First) Name (Optional)

Preferred first name should be entered into the preferred first name field (e.g., Christopher Paul Smith). If 'Paul' were what the person goes by, then 'Paul' would be entered into the preferred name field. Enter Jim for James or Chris for Christine if such a name were preferred. Likewise, enter the middle name if this is preferred over the first name.

Do not enter nicknames. These should be entered in the NICK field. All information is to be entered using mixed case (standard combination of upper and lower case letters). Enter the legal spelling and format of the preferred first name as supplied to you by the person. If no preferred name is given, leave the field blank.

3.3.8 Non-Person Name/Vendor

All information is to be entered using mixed case (standard combination of upper and lower case letters). Acronyms are an exception. See the acronym section below. Enter the vendor's name as

Supplied to you by the vendor. If possible, the name should be that obtained from the vendor's W9 or associated with the Tax ID number.

Only hyphenation should be entered (no comma, periods or other punctuation). Hyphens may be used to separate double names. No spaces should appear before or after a hyphen.

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Spaces are permitted if the legal spelling and format of the name includes spaces. Spaces should be used if the name of the company is derived from the initials of a person's name. For example, use A G EDWARDS not AG EDWARDS.

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

The ampersand (&) can be used only when part of a formal name (e.g., Baltimore & Ohio Railroad). Use 'and' in all other cases.

Abbreviations are allowed for Co, Corp, Lt d, LLC or Inc. when used after the name of a corporate entity. All other forms of abbreviations should not be used for the corporate entity name.

Do not use a period or comma in the name except in abbreviations such as those given above.

Acronyms – Companies that are recognized by their acronyms should be entered using their acronym (e.g., IBM, SCT, ABC, ATT and IIT).

3.4 Address Standards

The Mailing Address must be populated when a company or business is added to the system. What the postal service reports as address is standard. The rare exception may be made if a person insists on a variation. Multiple addresses can be entered for a person or vendor using different address types. Follow the procedures established by your department for address entries. Address standards have been established cooperatively so that address types are used consistently. Department specific standards should be recorded with the Data Standards committee. Use the appropriate address typed code from STVATYP. See the Appendix 2: Address Type and Appendix 3: Phone Type for a list of standard types and their descriptions.

International students must have street addresses.

3.4.1 Street Standards

All information is to be entered using upper and lower case letters.

The first address line is always required.

Hyphens may be used when needed for clarity or designated fractions. No spaces should appear before or after a hyphen.

Do NOT leave blank lines between street lines.

Banner Data Standards

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

‘In Care of’ should be entered as ‘c/o’. Do NOT use the % sign or spell out ‘in care of’.

The address format allows three lines of street address information. If a separate street address and PO Box number address need to be maintained, enter them as two separate address types.

Example:

<u>Information Given</u>	<u>Mailing Address</u>	<u>Home Address</u>
John F Smith	John F Smith	John F Smith
PO Box 2351 1379 NW Pine	PO Box 2351	1379 NW Pine
Portland OR 97203	Portland OR 97203	Portland OR 97203

Where possible, enter the street and apartment or suite number in the same field. If the address has more than one line and exceeds the characters allowed in the first line of the street address field, those lines should go from specific to general. For example, go from apartment number to street number.

Mr. John Smith Apt
5100 Major St New York
NY 10001

3.4.2 Abbreviations for Street Designations

Abbreviations for street designations should be used and follow the standard US Post Office.

(For a complete list of Postal Abbreviations see: <http://www.usps.com/ncsc/lookups/abbreviations.html>)

<u>Abbreviation</u>	<u>Description</u>
Apt	Apartment
Ave	Avenue
Blvd	Boulevard
Br	Branch
Ctr	Center
Ct	Court
Cir	Circle
CR	County Road
Dr.	Drive
Est	Estate
FM	Farm to Market
Hwy	Highway
HCR	Highway Carrier Rout
Ln	Lane
Pkwy	Parkway
Pl	Place
Pvt.	Privet Road
Rd	Road

<u>Abbreviation</u>	<u>Description</u>
Rit.	Route
RR	Rural Rout or Ranch Road
Sq.	Square
Sta	Station
St	Street
Ste	Suite
Ter	Terrance
Tr	Trail

3.4.3 Unit Numbers such as Apartment, Building, Suite, etc.

The pound sign (#) and percent sign (%) should not be used because they may cause ORACLE database errors. Replace # with No. Enter addresses as given in regard to using Apt., Ste, Unit etc. For example,

Mr. John Smith
200 Main St Apt No 5 New York
NY 10001

3.4.4 Sources for additional information

Several US Postal Service publications deal with addressing standards. The most comprehensive and accessible publication is Postal Addressing Standards, Publication 28. This is available from the US Postal Service as well as in a pdf format on the internet at: <http://pe.usps.gov/cpim/ftp/pubs/pub28/pub28.pdf>

The US Postal Service National Customer Support Center provides extensive address and zip code information: <http://www.usps.gov/ncsc/>

The Canadian Postal Service (Canada Post) also offers a useful website:
<http://www.canadapost.ca/CP/C2/menu01.html>

3.4.5 Sample Addresses

All information is to be entered using mixed case (standard combination of upper and lower case letters).

On Campus mail

Student:	Name	Alpine Faculty & staff: Name
	On Campus Student	Department name

Banner Data Standards

C- xxxx

C- xxxx

Alpine TX 79832

Alpine TX 79832

Sample Local

Name

380 Ave B Apt xxxx

Alpine TX 79830-xxxx

3.4.6 City Standards

The United States Postal Service offers Address Information System (AIS) products which may be used to automate addressing. The City State Product is a comprehensive list of zip codes with corresponding city and county names.

Banner may be configured to automatically enter the city name when a zip code is entered. This is the preferred method of entering the city name. If the preferred name which defaults is not correct, it is acceptable to change the city to the actual city name.

For example, when entering the zip code 63103, the city will default as St. Louis, but could also be the city of Brent wood.

Spell out city names whenever possible, e.g. Fort Davis, Fort Worth. All information is to be entered using mixed case (standard combination of upper and lower case letters). Do NOT abbreviate unless you are limited by space.

3.4.7 County [STVCNTY]

The AIS product is described in 3.4.6.

Banner may be configured to automatically enter the county name when a zip code is entered. This is the preferred method to enter the county name. The county code follows the 3-digit Federal Information Processing Standards (FIPS).

Financial aid requires that the county codes conform to those used by the state of Texas.

3.4.8 State Standards [STVSTAT]

The AIS product is described in 3.4.6.

Banner may be configured to automatically enter the state name when a zip code is entered. This is the preferred method of entering a state name. Otherwise, select the correct codes defined in STVSTAT. State codes must be entered for all US and Canadian addresses.

Banner Data Standards

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. Each has its own entry into the State field. Canadian addresses must include the city in the City field and the Province in the State field.

3.4.9 Zip Code Standards

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

United States – Enter the 5-digit zip code. When the 9-digit zip code is available, place a hyphen between the first 5 and last 4 digits.

Canadian – Enter the six character zip code with space after first three characters.

Mexico

The states of México and their official abbreviations are:

AGS	Aguascalientes
BCN	Baja California Norte
BCS	Baja California Sur
CAM	Campeche
CHIS	Chiapas
CHIH	Chihuahua
COAH	Coahuila
COL	Colima
DF	Distrito Federal
DGO	Durango
GTO	Guanajuato
GRO	Guerrero
HGO	Hidalgo
JAL	Jalisco
MEX	México (Est ado de)
MICH	Michoacán
MOR	Morelos
NAY	Nayarit
NL	Nuevo León
OAX	Oaxaca
PUE	Puebla
QRO	Querétaro
QROO	Quintana Roo
SLP	San Luis Potosí
SIN	Sinaloa
SON	Sonora
TAB	Tabasco
TAMPS	Tamaulipas
TLAX	Tlaxcala
VER	Veracruz
YUC	Yucatán
ZAC	Zacatecas

The 5-digit postal code goes on the left, then the town or city, a comma, and the state abbreviation. For Example:

Facultad Latinoamericana de Ciencias Sociales
Carretera Al Ajusco Km 13, Colonia Héroes de Padierna
Apartado 20-021, Delegación Alvaro Obregón
01000 Mexico, DF MEXICO

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

Examples:

Cheng Li
7-301 Houji
Middle of JiangNan Road
Guang Zhou 510240 Guang Zhou
China P.R.C.

Bader H Al-Khalifia
c/o Aramco
Dhahram 31311
Saudi Arabia

3.4.10 Nation Codes [STVNATN]

Codes should only be added for non-US addresses.

3.4.11 Military Address

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

Col Robert Vela
Laughlin Air Force Base 47
MSS-DP F 427 Liberty Dr. Del
Rio, TX 78843

Banner Data Standards

Overseas military locations 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 and FPO 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

AE for mail to Europe, the Middle East, Africa and Canada (090 through 098)

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

SSGT Jane Doe
Unit 2050 Box 4190
AP O AP 96522-1215

3.4.12 Telephone numbers

The three digit area code must be entered into its field for all phone numbers including the local areas. Enter the seven digit phone number without a hyphen. If an extension is provided, enter only the digits of the extension in the extension field. Do not enter EXT or X into the extension field. See Appendix 3 for a list of phone types. To any phone type you may attach any address type as primary.

3.4.13 International telephone numbers

International telephone numbers consist of four to seven digits. Only access codes should be entered into the “international” field. These numbers should include the country and city codes as part of the international access code field. The country code consists of one to four digits and is required. The city code consists of one to three digits. Not all countries utilize city codes. The city code is often reported with a leading 0. Do not enter the 0. *The phone number itself goes into the regular phone number field.*

The North American Numbering Plan (NANP) is an agreement among many North American countries (but not Mexico) which establishes a procedure whereby international numbers can be dialed in a manner similar to traditional US procedures (1 + area code). The country code for all NANP countries is 1. The following countries are considered to be part of the NANP and can be dialed using 1 + the three digit area code. Any phone numbers from NANP countries can be entered into the domestic phone number field in the Banner system.

Country	Area Code	Country	Area Code
Anquilla	264	Guam	671
Antigua	268	Jamaica	876
Bahamas	242	Montserrat	664
Barbados	246	Northern Marianas Islands	671 (Saipan,
		Rot a & Trinian)	
Barbuda	268	Puerto Rico	787
Bermuda	441	Saint Kitts-Nevis	869
British Virgin Islands	284	Saint Lucia	758

Banner Data Standards

Canada		Saint Vincent and Grenadines	784
Cayman Islands	345	Trinidad and Tobago	868
Dominica	767	Turks and Caicos Islands	649
Dominican Republic	809	US Virgin Islands	340
Grenada	473		

3.5 Email [GTVEMAL]

An entity (person or non-person) may have multiple email addresses within the Banner system. The sample email address is the preferred email address.

Email addresses should be accurate and reflect the most recent data received. When adding a new email address of the same type, the previous should be end-dated and the new address added. Unless making a correction due to an initial entry error, do not change or delete the prior email address.

If the email address is a URL enter only the URL itself and check the URL box. There is no need to include "http://," however for secure sites it is necessary to include the prefix "https://."

CODE	DESCRIPTION
SRSU	Sul Ross Email (if applicable)
HOME	Personal email address
BUSN	Business email address
URL	Used when email address is a URL. Set flag.

3.6 Date Standards

Dates are to be entered in the format of mm-dd-yyyy. All dates will be displayed and stored as two digit day-three character abbreviated month and four digit year. **A search on date must be in the form mm - dd-yyyy.**

Example:

<u>Enter</u>	<u>Displayed as</u>
01171993	17-JAN-1993
11011992	01-NOV-1992

3.7 Birth Date Standards

Enter the date of birth according to the Date Standards. If no birth date is given, leave it blank. 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 or, in the case of student employees, to Student Employment.

3.8 Confidential Information Indicator Standards

This field will be left blank unless a student requests the Registrar to not release any Directory Information (see Privacy Rights in catalog) at which time this box will be checked. If checked, no Directory Information will be publicly released per FERPA.

3.9 Citizenship Type Standards [STVCITZ]

Code	Description	Explanation
P	Permanent Resident/ Res. Alien	A person who is not a citizen or national of the United States and who has been lawfully admitted for permanent residence.
N	Non-resident Alien	A person who is not a citizen or national of the United States.
A	U.S. Citizen	A citizen of the United States, owing service to it, and having attendant political rights.
R	Refugee	A person who has refugee or asylum status
U	Unspecified	

3.10 Gender Code Standards

Code	Description
F	Female
M	Male
U	Unspecified

3.11 Ethnic Code Standards [STVETHN]

The categories are determined by the current government standards. The default value is blank.

Banner Data Standards

Code	Description	Explanation
1	Caucasian/Non- Hispanic	A person having origins in any of the original peoples of Europe, North Africa, or the Middle East (except those of Hispanic origin).
2	Black, Non-Hispanic	A person having origins in any of the black racial groups of Africa
3	Hispanic	A person of Puerto Rican, Cuban, Central or South America, or other Spanish culture or origin, regardless of race.
4	Asian or Pacific Islander	A person having origins in any of the original peoples of the Far East or Southeast Asia. This includes people from China, Japan, Korea, and Vietnam.
5	American Indian/ Alaskan Native	A person having origins in any of the original peoples of North America or who maintain cultural identification through tribal affiliation or community recognition.
6	Alien	International
7	Unknown	

3.12 Marital Code Standards [STVMRTL]

When needed by Student Financial Aid and/or Human Resources, the following codes will be used:

Code	Description	Explanation
M	Married	Legally married
S	Single	Never legally married
W	Widowed/Widower	Once married, but no longer and only one living
X	Separated	Legally married but living apart

3.13 Religion Code Standards [STVRELG]

Code	Description
AG	Assembly of God
BP	Baptist
BU	Buddhist
CA	Catholic
CH	Christian-Disciples of Christ
CR	Church of Christ

EP	Episcopalian/Anglican
HN	Hindu
IS	Islam
JE	Jewish
JW	Jehovah's Witness
LU	Lutheran
ME	Methodist
MN	Mennonite
MO	Church of Latter Day-Mormon
MU	Muslim
NA	Nazarene
OR	Orthodox
PE	Pentecostal
PR	Presbyterian
PT	Other Protestant
SD	Seventh Day Adventist
UN	Unitarian
NO	None
OT	Other

3.14 ***Veteran Information [STVVETC]***

Sources of aid (chapters) should be associated with this validation table.

Code	Description	Explanation
30	Chapter 30	Montgomery GI Bill/Active Duty Status
31	Chapter 31	Vocational Rehabilitation
32	Chapter 32	Contribution VEAP
34	Chapter 34	Old GI Bill
35	Chapter 35	Dependent, Wife, Widow, Child
R1	Chapter 1606	Active Duty Reserve/NG
01	Chapter 901	Ed Assistance Test Program
03	Chapter 903	Non Contributing VEAP
HZ	Hazelwood	Hazelwood Benefits

3.15 Deceased Information

Prompt attention is important so future mailings from the university's offices are discontinued. Deceased status must be verified information, not just perceived information. **Remember that all processing stops.**

All population selections for communication purposes must search for, and exclude, deceased persons. Set end-date to death date (if known) or current date.

An annual review of, and end dating of, addresses for deceased persons will be conducted.

If you receive notification that a person has passed away, check the General Person screen GUASYST to see which Banner applications rack this person.

By email, notify the data owner as appropriate in Human Resources, Registrar or Advancement. Include:

Name of Person
Banner ID
Date of death (if known)
Source of information

Enter 'Y' if the employee/student is deceased. Update the date of death, if known. *If a date of death is entered, the deceased flag is set.* Deceased information should be maintained using the same guidelines as name changes. Refer to the Data Change Rules section of this document.

APPENDIX 1 – Prefixes, Suffixes and Salutations

TITLE Academics	PREFIX	SUFFIX (envelope)
professor	abbot, Roman Catholic	
associate professor assistant professor chancellor, university	archbishop, Roman Catholic bishop, Roman Catholic brotherhood, Roman Catholic brotherhood, superior Cantor cardinal Professor Joseph Stone	
chaplain	s a m e	
dean, college or university instructor	a s a b o v e s	
president		
president/priest		

Banner Data Standards

a	Dr./Mr./Mrs./Ms. Jane Stone
m	
e	The Reverend Joseph Stone
a	P resident of ...
s	
a	Clerical &
b	Religious Orders
o	
v	The Right Reverend
e	Joseph Stone
	Abbott of ...
Dr./Mr./Mrs./Ms. Jane Stone	
	The Most Reverend Joseph Stone
	Archbishop of ...
The Reverend Joseph Stone	The Most
	Reverend Joseph
	Stone Bishop of
Dean Joseph Stone or	...
Dr. Jane Stone	Brother Joseph Stone
Dean, School of ...	Brother Joseph Superior
Mr./Mrs./Ms./Dr. Jane Stone	Cantor Jane Stone
	His Eminence
P resident Jane Stone or	Joseph Cardinal Stone
(Letter)	
Dear Professor Stone: or Dear Dr. /Mr. /Mrs. /Ms. Stone: same as above same as above Dear Chancellor Stone:	
Dear Chaplain Stone: or Dear Mr. /Ms. Stone: or Dear Father Stone: Dear Dean Stone: or Dear Dr. /Mr. /Mrs.	
/Ms. Stone:	
DearDr./Mr./Mrs./Ms.	
Stone: Dear P resident Stone: or Dear Dr. /Mr. /Mrs. /Ms. Stone: Sir: or Dear Father Stone:	
Right Reverend Abbott: or	
Dear Father Abbott:	

Banner Data Standards

SALUTATION

Your Excellency:

Your Excellency: or Dear Bishop Stone:

Dear Brother: or

Dear Brother Joseph:

Dear Brother Joseph:

Dear Cantor Stone:

Your Eminence:

Right Reverend

monsignor, Roman Catholic
(domestic prelate) The Right Reverend Monsignor
Joseph Stone

Monsignor: or
Dear Monsignor: or
Dear Monsignor Stone:
Very Reverend and
Dear Monsignor Stone:

papal chamberlain
Roman Catholic The Very Reverend Monsignor
Joseph Stone

priest, Roman Catholic The Reverend Joseph Stone

Rabbi Rabbi Jane Stone

sisterhood, Roman Catholic Sister Mary Jane

Dear Father: or Dear
Father Stone:
Dear Rabbi Stone: or
Dear Dr. Stone:
Dear Sister: or Dear Sister
Jane: Reverend Mother:
or

The Reverend Dear Reverend sisterhood, superior

Mother Superior

Mother:

For religious who are other than Roman Catholic, please see a recent copy of [The Professional Secretary's Handbook](#)

Military (officer ranks) (Use prefix, name, and suffix for all military ranks; officer and enlisted.)

USA = United States Army USAF =

United States Air Force USCG =

United States Coast Guard USMC =

United States Marine Corp. USN =

United States Navy

TITLE	PREFIX	SUFFIX	SALUTATION
Admiral	ADM Lee Stone,	USCG/USN	Dear Admiral Stone:
brigadier general	Brig Gen Lee Stone, BG Lee Stone,	USAF USA	Dear General Stone: Dear General Stone:
Captain	BGen Lee Stone, Capt. Lee Stone, CP T Lee Stone, CAP T Lee Stone,	USMC USAF/USMC USA USCG/USN	Dear General Stone: Dear Captain Stone: Dear Captain Stone: Dear Captain Stone:
chief warrant officer	CWO Lee Stone,	USAF/USA	Dear Mr./Ms. Stone
Colonel	Col Lee Stone, COL Lee Stone,	USAF/USMC USA	Dear Colonel Stone: Dear Colonel Stone:
commander	CDR Lee Stone,	USCG/USN	Dear Commander Stone:

February 5, 2015

Banner Data Standards

TITLE	PREFIX	SUFFIX	SALUTATION
Ensign	ENS Lee Stone,	USCG/USN	Dear Mr./Ms. Stone
first lieutenant	1st Lt Lee Stone, 1LT Lee Stone,	USAF USA	Dear Lt. Stone:
General	1st Lt Lee Stone, Gen Lee Stone, GEN Lee Stone,	USMC USAF/USMC USA	Dear Lt. Stone: Dear General Stone: Dear General Stone:
lieutenant	LT Lee Stone,	USCG/USN	Dear Lt. Stone: or Dear Mr./Ms. Stone
lieutenant colonel	Lt Col Lee Stone, LTC Lee Stone, LtCol Lee Stone,	USAF USA USMC	Dear Colonel Stone: Dear Colonel Stone:
lieutenant commander	LCDR Lee Stone, Lt Gen Lee Stone,	USCG/USN USAF	Dear Commander Stone: Dear General Stone:
lieutenant general	LTG Lee Stone, LtGen Lee Stone,	USA USMC	Dear General Stone: Dear General Stone:
lieutenant (junior grade)	LTJG Lee Stone,	USCG/USN	Dear Lt. Stone: or Dear Mr./Ms. Stone
Major	Maj Lee Stone, MAJ Lee Stone, Maj Gen Lee Stone,	USAF/USMC USA USAF	Dear Major Stone: Dear Major Stone: Dear General Stone:
major general	MG Lee Stone, MajGen Lee Stone,	USA USMC	Dear General Stone: Dear General Stone:
rear admiral	RADM Lee Stone, 2d Lt Lee Stone, 2LT Lee Stone,	USCG/USN USAF USA	Dear Admiral Stone: Dear Lt. Stone: Dear Lt. Stone:
Second lieutenant	2dLt Lee Stone,	USMC	Dear Lt. Stone:
vice admiral	VADM Lee Stone,	USCG/USN	Dear Admiral Stone:
Warrant officer	WO Lee Stone,	USAF/USA	Dear Mr./Ms. Stone
Cadet	Cadet Lee Stone		
midshipman	Midshipman Lee Stone		Dear Mr./Ms. Stone Dear Midshipman Stone: or Dear Mr./Ms. Stone
Military (enlisted ranks)			
Airman	AMN Lee Stone,	USAF	Dear Airman Stone:
airman basic	AB Lee Stone,	USAF	Dear Airman Stone:
airman first class	A1C Lee Stone,	USAF	Dear Airman Stone:
chief petty officer	CP O Lee Stone,	USCG/USN	Dear Mr./Ms. Stone
corporal	CP L Lee Stone,	USA	Dear Corporal Stone:
Gunnery sergeant	GySgt Lee Stone,	USMC	Dear Sergeant Stone:
lance corporal	L/Cpl Lee Stone, MSGT Lee Stone, MSG Lee Stone,	USMC USAF USA	Dear Corporal Stone: Dear Sergeant Stone: Dear Sergeant Stone:
master sergeant	P O Lee Stone,	USCG/USN	Dear Mr./Ms. Stone:
petty officer	P VT Lee Stone, P vt Lee Stone,	USA USMC	Dear Private Stone: Dear Private Stone:
Private	P FC Lee Stone,	USA	Dear Private Stone:
private first class	SMN Lee Stone,	USCG/USN	Dear Seaman Stone:
Seaman	S1C Lee Stone,	USCG/USN	Dear Seaman Stone:
Seaman first class	SMSGT Lee Stone,	USAF	Dear Sergeant Stone:
senior master sergeant			Ensign Stone: or

Banner Data Standards

sergeant sergeant major (this is a title not a rank)	SGT Lee Stone, SG Lee Stone, SGM Sgt. Maj. Lee Stone,	USAF USA USA/USMC	Dear Sergeant Stone: Dear Sergeant Stone: Dear Sergeant Major Stone:
specialist (could be 1-4)	S4 Lee Stone,	USA	Dear Specialist Stone:
staff sergeant	SSGT Lee Stone, SSG Lee Stone,	USAF USA	Dear Sergeant Stone: Dear Sergeant Stone:
technical sergeant	TSGT Lee Stone,	USAF	Dear Sergeant Stone:
Professions attorney	Mr./MS/Mrs. Jane Stone or Jane Stone,	Attorney-at-law or Esq.	Dear Mr./MS/Mrs. Stone: Dear Mr./MS/Mrs. Stone: Dear Cadet Lee Stone: or
Dentist	Joseph Stone,	DDS	Dear Dr. Stone:
medical doctor	Jane Stone,	MD	Dear Dr. Stone:
acupuncture physician	Jane Stone,	AP	Dear Dr. Stone:
audiology doctorate	Joseph Stone,	AuD	Dear Dr. Stone:
doctor of chiropractic	Jane Stone,	DC	Dear Dr. Stone:
doctor of homeopathic med.	Joseph Stone,	DH m	Dear Dr. Stone:

Banner Data Standards

TITLE doctor	PREFIX	SUFFIX	SALUTATION
of medical dentistry	Jane Stone,	DMD	Dear Dr. Stone:
doctor of osteopathy	Joseph Stone,	DO	Dear Dr. Stone:
doctor of oriental medicine	Jane Stone,	DOM	Dear Dr. Stone:
doctor of podiatric medicine	Joseph Stone,	DPM	Dear Dr. Stone:
homeopathic medical doctor	Jane Stone,	HMD	Dear Dr. Stone:
naturopathic doctor	Joseph Stone,	ND	Dear Dr. Stone:
naturopathic medical doctor	Jane Stone,	NMD	Dear Dr. Stone:
doctor of optometry	Joseph Stone,	OD	Dear Dr. Stone:
oriental medicine doctor	Jane Stone,	OMD	Dear Dr. Stone:
doctor of psychology doctor of pharmacy	Joseph Stone,	PsyD	Dear Dr. Stone:
veterinarian registered	Joseph Stone,	Pharm D	Dear Dr. Stone:
nurse licensed	Jane Stone,	DVM	Dear Dr. Stone:
practical nurse	Joseph Stone, RN	Dear Mr./Ms./Mrs. Stone: Jane Stone, LPN	Dear Mr./Ms./Mrs. Stone:
Other Academic/Educational Degrees/Certifications			
doctor of education	Joseph Stone,	EdD	Dear Dr. Stone:
doctor of philosophy certified	Jane Stone, Joseph	PhD CPA	Dear Dr. Stone:
public accountant	Stone,		Dear Mr./Ms./Mrs. Stone
certified financial planner	Jane Stone,	CFP	Dear Mr./Ms./Mrs. Stone
Family titles			
Mr. Joseph Stone			use 'Messrs.' if writing to more than one
Ms. Jane Stone			use 'Mses.' or 'Mss.' if writing to multiples
			use
Mrs. Jane Stone			'Misnames' if writing to more than one
Joseph Stone,			Jr
Joseph Stone,			Sr.
Joseph Stone,			I
Joseph Stone,			II
Joseph Stone,			III
Joseph Stone,			IV
Joseph Stone,			V

Other historical codes (do not use these anymore)

estate of ...	EST
Mr. and Mrs.	M/M
Dr. and Mrs.	D/M
Dr. and Dr.	D/D
Dr. and Rev	D/R
Honorable and Mrs.	H/M
Reverend and Mrs.	R/M

For the proper form of address for a married couple where one spouse has a title, please see [The Professional Secretary's Handbook](#).

For the proper form of address for diplomats and federal, state, and local officials, please see a recent copy of [The Professional Secretary's Handbook](#). In general, use 'The Honorable' with the name and include the person's title on the second line. Generally, the salutation is 'Mr./Ms./Mrs.' except use the title for the attorney general, cabinet members, congressional committee chairs, supreme court justices, governors, judges, the postmaster general, the president, secretary of state, senator, speaker of the house, and vice president.

Some Commonly Used Religious Order Suffixes

Srs. of the Blessed Virgin Mary	BVM	Srs. of the Holy Cross	CSC HM
De La Salle Brothers	FSC	Immaculate Heart of Mary Rep.	OFM
Little Sisters of the Poor	LSP	Order of Francis can Minors	OSC
Order of Preachers	OP	Sisters of Charity	
Ursuline Nuns	OSU	Order of St Francis	OSF
Order of St Benedict	OSB	Sisters of Mercy	RSM
Srs. of Charity of Nazareth	SCN	Franciscan Srs. of the Poor	SFP
Society of Jesus Sisters	SJ	Society of Mary	SM
of Notre Dame	SND	School Srs. of Notre Dame	SSN
Divine Word Missionaries	SVD		

APPENDIX 2 - ADDRESS TYPES

Code	Description
(Blank)	Not Specified
AP	Accounts Payable – Remittance
BI	Billing
BU	Business
CO	Consortium
EM	Emergency
FA	Financial Assistance
LO	Local
MA	Mailing
NK	Next of Kin
PA	Parents
PR	Permanent
PU	Purchase Order
SA	SEVIS US Address
SD	SEVIS Dependent
TP	Temporary
TX	T ax (W-9)
WK	Work
XX	Reserved for T GRFEED only

APPENDIX 3 - PHONE TYPES [STVTELE]

Code	Description
1P	Primary Phone
2P	Secondary Phone
3P	Other Phone
AP	Accounts Payable – Remittance
APFX	Accounts Payable – Remittance Fax
BI	Billing
BU	Business or Work
EMER	Emergency Contact
FX	Fax Machine
PA	Parents
PR	Permanent
PU	Purchase Order
PUFX	Purchase Order Fax

Appendix 4 – Texas County Codes [STVCNTY]

These codes are used exclusively by Financial Aid and Student Records for State and Federal reporting. There is no need for county codes of other states.

Counties	Co Counties	u Codes	nty County	County Codes	County Codes
Anderson	0				
	0	Andrews	002	Angelina	003
	1				
	0				
Aransas	0	Archer	005	Armstrong	006
	4				
Atascosa	0	Austin	008	Bailey	009
	0				
	7				
Bandera	0	Bastrop	011	Baylor	012
	1				
	0				
Bee	0	Bell	014	Bexar	015
	1				
	3				
Blanco	0	Borden	017	Bosque	018
	1				
	6				
Bowie	0	Brazoria	020	Brazos	021
	1				
	9				
Brewster	0	Briscoe	023	Brooks	024
	2				
	2				
Brown	0	Burleson	026	Burnet	027
	2				
	5				
Caldwell	0	Calhoun	029	Callahan	030
	2				
	8				
Cameron	0	Camp	032	Carson	033
	3				
	1				
Cass	0	Castro	035	Chambers	036
	3				
	4				
Cherokee	0	Childress	038	Clay	039
	3				
	7				

Banner Data Standards

Cochran	04	Coke	041	Coleman	042
Collin	04	Collingsworth	044	Colorado	045
Comal	04	Comanche	047	Concho	048
Cooke	04	Coryell	050	Cottles	051
Crane	05	Crockett	053	Crosby	054
Culberson	05	Dallam	056	Dallas	057
Dawson	05	Deaf Smith	059	Delta	060
Denton	06	DeWitt	062	Dickens	063
Dimmit	06	Donley	065	Duval	066
Eastland	06	Ector	068	Edwards	069
Ellis	070	El Paso	071	Erath	072
Falls	073	Fanning	074	Fayette	075
Fisher	076	Floyd	077	Foard	078
Fort Bend	079	Franklin	080	Freestone	081
Frio	082	Gaines	083	Galveston	084
Garza	085	Gillespie	086	Glasscock	087
Goliad	088	Gonzales	089	Gray	090
Grayson	091	Gregg	092	Grimes	093
Guadalupe	094	Hale	095	Hall	096

Banner Data Standards

Hamilton	097	Hansford	098	Hardeman	099
Hardin	100	Harris	101	Harrison	102
Hartley	103	Haskell	104	Hays	105
Hemp hill	106	Henderson	107	Hidalgo	108
Hill	109	Hockley	110	Hood	111
Hopkins	112	Houston	113	Howard	114
Hudspeth	115	Hunt	116	Hutchinson	117
I rion	118	J ack	119	Jackson	120
Jasper	121	Jeff Davis	122	Jefferson	123
Jim Hogg	124	Jim Wells	125	Johnson	126
Jones	127	K arnes	128	Kaufman	129
Kendall	130	Kennedy	131	Kent	132
Kerr	133	Kimble	134	King	135
Kinney	136	Kleberg	137	Knox	138
L amar	139	Lamb	140	Lampasas	141
La Salle	142	Lavaca	143	Lee	144
Leon	145	Liberty	146	Limestone	147
Lipscomb	148	Live Oak	149	Llano	150
Loving					
	151	Lubbock	152	Lynn	153
M adison	154	Marion	155	Martin	156
Mason	157	Matagorda	158	Maverick	159
McCulloch	160	McLennan	161	McMullen	162
Medina	163	Menard	164	Midland	165
Milam	166	Mills	167	Mitchell	168

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Montague	169	Montgomery	170	Moore	171
Morris	172	Motley	173	Nacogdoches	174
Navarro	175	Newton	176	Nolan	177
Nueces	178	Ochiltree	179	Oldham	180
Orange	181	Palo Pinto	182	Panola	183
Parker	184	Parmer	185	Pecos	186
Polk	187	Potter	188	Presidi	189
Rains	190	Randall	191	o	192
Real	193 196	Red River	194 197	Reagan	195
Refugio	199	Roberts	200	Reeves	198
Rockwall	202	Runnels	203	Robertson	201
Sabine	205 208	San Augustine	206 209	Rusk	204
San Patricio	211	San Saba	212	San Jacinto	207
Scurry	214	Shackelford	215	Schleicher	210
Sherman	217	Smith	218	Shelby	213
Starr	220	Stephens	221	Somervell	216
Stonewall	223	Sutton	224	Sterling	219
Tarrant	226	Taylor	227	Swisher	222
Terry		Throckmorton		Terrell	225
Tom Green		Travis	230	Titus	228
	229				
	232		233	Trinity	
Tyler					
	235		236		231
Uvalde		Upshur			
		Val Verde		Upton	234
Victoria				Van Zandt	237
Ward	238	Washington	239	Webb	240
Wharton	241	Wheeler	242	Wichita	243
Wilbarger	244	Willacy	245	Williamson	246
Wilson	247	Winkler	248	Wise	249

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Wood	250	Yoakum	251	Young	252
	253	Zavala	254		
Zapata					

Appendix 5 – State Abbreviations

ALABAMA	AL
ALASKA	AK
AMERICAN SAMOA	AS
ARIZONA	AZ
ARKANSAS	AR
CALIFORNIA	CA
COLORADO	CO
CONNECTICUT	CT
DELAWARE	DE
DISTRICT OF COLUMBIA	DC
FEDERATED STATES OF MICRONESIA	FM
FLORIDA	FL
GEORGIA	GA
GUAM	GU
HAWAII	HI
IDAHO	ID
ILLINOIS	IL
INDIANA	IN
IOWA	IA
KANSAS	KS
KENTUCKY	KY
LOUISIANA	LA
MAINE	ME
MARSHALL ISLANDS	MH
MARYLAND	MD
MASSACHUSETTS	MA
MICHIGAN	MI
MINNESOTA	MN
MISSISSIPPI	MS
MISSOURI	MO
MONTANA	MT
NEBRASKA	NE
NEVADA	NV
NEW HAMPSHIRE	NH
NEW JERSEY	NJ
NEW MEXICO	NM
NEW YORK	NY
NORTH CAROLINA	NC

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NORTH DAKOTA	ND
NORTHERN MARIANA ISLANDS	MP
OHIO	OH
OKLAHOMA	OK
OREGON	OR
PALAU	PW
PENNSYLVANIA	PA
PUERT O RICO	PR
RHODE ISLAND	RI
SOUTH CAROLINA	SC
SOUTH DAKOTA	SD
TENNESSEE	TN
TEXAS	TX
UTAH	UT
VERMONT	VT
VIRGIN ISLANDS	VI
VIRGINIA	VA
WASHINGTON	WA
WEST VIRGINIA	WV
WISCONSIN	WI
WYOMING	WY

APPENDIX 6 - Sul Ross State University: Access to University Information Compliance Form

Acknowledgment and Compliance Statement

Personnel, student, financial, and medical information contained within the university's information systems is considered confidential. Access to this confidential information and any other information made confidential by law is limited to those individuals whose position requires use of this information. By signing the statement below, you are acknowledging your acceptance and adherence to the confidentiality requirements imposed by federal and State law and Sul Ross State University Policy APM 7.09, Confidential Data Policy.

If you are uncertain what constitutes legitimate use or release of information, err on the side of confidentiality and refer the inquiry to your supervisor, the appropriate Data Owner or the CIO.

I understand that by virtue of my position at Sul Ross State University, I may have access to data which is confidential and is not to be disclosed to any person or entity without appropriate authorization. In order to access confidential information, I agree to adhere to the following guidelines:

1. I understand and acknowledge that improper or inappropriate use of data in the university's information systems is a violation of university policy (APM 7.04, appropriate use of information Technology Resources) and it may also constitute a violation of federal and state laws.
2. I will not provide confidential information to any individual or entity without proper authorization.

Commented [DG1]: I made a modification to what we talked about in the meeting that I wanted to highlight here. We talked about this being my office but I prefer this chain of authority (if that is the right term) I have used here.

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3. I will not review records or files for which I do not have a legitimate need to know in order to perform my duties.
4. I will not remove confidential information from university facilities except as specifically authorized to do so.
5. I will not make copies of any records or data except as specifically authorized in performance of my duties.
6. I will not share my user id and password with anyone.
7. I will not use the data for personal use or for commercial purposes.
8. I will refer all requests from external agencies for information, including open records requests, statistics, or academic and administrative information, to the Office of the President's Public Information Coordinator (PIC). This includes requests from law enforcement, local, state and federal government, courts and other agencies outside of the Texas State System and Sul Ross State University.
9. Should I become aware of any unauthorized access to confidential data, I agree to report this information immediately to my supervisor, the Data Owner or to the CIO.
10. I understand that any improper or inappropriate use of data in the university's information systems may result in the removal of access privileges and could also result in appropriate administrative action, including but not limited to disciplinary action and termination.
11. I have read the APM 7.09, Confidential Data Policy, and agree to assist in its enforcement

With my signature, I acknowledge that I have read and agree to abide by these compliance guidelines and have read and agree to assist in the enforcement of the SRSU Information Security Policy.

Printed Last Name	Printed First Name	Middle Initial
Signature of Applicant		Date
For Office Use: Accepted by (Printed Name)	Signature	Date

Appendix 7- Letter Generation Tables

Entries in the tables associated with letter generation – GTVLET R, STVMATL and GTV PARA – are coded according to administrative unit.

Office	Code
Undergraduate Admissions	ADM_U_XXXX...
Graduate Admissions	ADM_G_XXXX...
Advancement	ADV_XXXX...
Financial Aid	FAM_XXXX...
Finance	FIN_XXXX...
Student	ST U_XXXX...
Human Resource	HRS_XXXX

Appendix 8

SRSU APPLICATION FOR SECURITY ACCESS

APPLICATION FOR SECURITY ACCESS

1. When a user (Sul Ross Employee or approved Contracted Employees) needs access to Banner, Argos, ImageNow, BCM, or FTP processes the approved SRSU Application for Security Access form must be completed in accordance with Section 1.3 of the Data Standards Document. The approved application can be located on Banner web page, <http://www.sulross.edu/banner>
2. Once the form is completed in accordance with standards the form should be sent to the Chair of the Data Owners Committee and/or the appropriate designee for access. Requests for access to Student processes should be sent to the Student Systems Analyst and/or designee for review and processing. Requests for access to Finance processes should be sent to the Banner Finance Coordinator and/or designee for review and processing. Requests for access to Student processes in RGC will be handled by the Director of Admissions and Records and/or designee. If additional signatures or approvals are required this will be handled by the appropriate designee
 - **Note: Banner Finance requires two authorized signatures for access.**
Signature of the Data Owner for the system the user is requesting access to.
Signature of the Banner Finance Coordinator or designee the VP for Finance.
3. For those areas that require training prior to access being granted, the user should contact the appropriate department as soon as possible to schedule required training. In addition, the Banner Finance Coordinator will monitor the new employee communications to determine if a new employee will require training for finance areas based on assigned job duties.
 - Access to Banner Requisitions – Contact the Purchasing Office for required training.
Access to Approval, Budget Query, EPAF's – Contact the Budget Office for required training.

Tips for completing the application:

Section 1

- Email Address should be the preferred address for Sul Ross email.
- Current Banner Login is based on the preferred email address (if email is mx3215@sulross.edu, your banner login will be mx3215).
- Employment Status (Faculty, Staff, or Student). Check "Continuing" if in a full-time permanent position or check "Temp/Student" if in a temporary or student position.

Section 2

- Check box(s) for the processes needed.
- Check area you are requesting access.
- Explain the purpose for access

Section 3

- Read Acknowledgement and Compliance Statement.
- User ID is banner "A" number. ☐ Sign and date and required.

SRSU APPLICATION FOR SECURITY ACCESS

Instructions: Refer to Section 1.3 of the Data Standards Document before completing form. Complete all sections. Route to the appropriate module approver. If multiple modules are requested, route to the approver of your top priority module.

Section 1 – User Information

ACCESS REQUEST FOR: _____ DIVISION/DEPT: _____ JOB TITLE: _____ WORK PHONE NO: _____
(Please print name)

EMAIL ADDRESS: _____ CAMPUS ADDRESS: _____ CURRENT BANNER LOGIN: _____

EMPLOYMENT STATUS: _____ ☐ CONTINUING ☐ TEMP/STUDENT (EXP. DATE: _____)

Section 2 – Access Information

ACCESS REQUESTED: (Check all that apply. Items in grey are not currently available). Indicate in each blank type of access (N – New; R –Remove; A – Additional Access

MODULES: (Check all that apply.) Banner INB ☐ Banner Self-Service ☐ Banner Test Instances ☐ Argos ☐ Image Now ☐ BCM ☐ FTP ☐

ACCESS REQUEST	APPROVAL SIGNATURES	
<input type="checkbox"/> FINANCE – BUDGET	_____ (_____)	Purpose for access:
*Training Required	Kim Lewis	Date

<input type="checkbox"/> FINANCE – ACCOUNTING	_____ (_____)	Purpose for access:
	Oscar Jimenez	Date

<input type="checkbox"/> HUMAN RESOURCES	_____ (_____)	Purpose for access:
	Gail Collier	Date

<input type="checkbox"/> FINANCE – PURCHASING	_____ (_____)	Purpose for access:
*Training Required	Noe Hernandez	Date
		Purpose for access:

<input type="checkbox"/> FINANCE	_____ (_____)	
*Signature Required	Tanya Romero	Date

<input type="checkbox"/> FINANCIAL – AID	_____ (_____)	Purpose for access:
	Melinda Cullins	Date

<input type="checkbox"/> ALPINE STUDENT	_____ (_____)	Purpose for access:
	Melinda Cullins	Date

<input type="checkbox"/> RGC STUDENT	_____ (_____)	Purpose for access:
	Claudia Wright	Date

<input type="checkbox"/> ADVANCEMENT	_____ (_____)	Purpose for access:
	Kara O'Shaughnessy	Date

Section 3 – Required Signatures ***Original Signatures are required***

USER _____ / _____ USER ID _____ DATE _____
Signature Print Name

SUPERVISOR _____ / _____ DATE _____ to _____
Signature Print Name

***Your signature above signifies your agreement to abide by all data standards and the attached compliance statement. Training is required. Banner is granted. User will be notified of required trainings.**

Acknowledgment and Compliance Statement

The following Acknowledgment and compliance statement is provided to protect employees and students at Sul Ross State University. Personnel, student, financial, and medical information contained within the University's information systems is considered confidential. This confidential information and any other information made confidential by law is limited to those individuals whose position requires use of this information. By signing the statement below, you are acknowledging your acceptance and adherence to the confidentiality requirements imposed by federal and State law and Sul Ross State University policy.

If you should ever be uncertain about what constitutes legitimate use or release of information, err on the side of confidentiality and refer the inquiry to the Center for Enrollment Service.

I understand that by virtue of my position at Sul Ross State University, I may have access to data which is confidential and is not to be disclosed to any person or entity without appropriate authorization, subpoena, or court order. In order to access confidential information, I agree to adhere to the following guidelines:

1. I understand and acknowledge that improper or inappropriate use of data in the University's Information Systems is a violation of University procedures and it may also constitute a violation of federal and state laws.
2. I will not provide confidential information to any individual or entity without proper authorization.
3. I will not review records or files for which I do not have a legitimate need to know in order to perform my duties.
4. I will not remove confidential information from University facilities except as specifically authorized to do so.
5. I will not make copies of any records or data except as specifically authorized in performance of my duties.
6. I will not share my user id and password with anyone, including my support staff (if applicable).
7. I will not use the data for personal use or for commercial purposes.
8. I will refer all requests for information from law enforcement, governmental agencies, and other external entities to the Office of the Provost, or those departments that have been authorized to respond to such requests.
9. I will refer external requests for all University statistical, academic or administrative data to the Office of Institutional Research and Effectiveness, Office of the Records and Registration, or those departments that have been authorized to respond to such requests.
10. Should I become aware of any unauthorized access to confidential data, I agree to report this information immediately to my supervisor or to the Director of Records and Registration.
11. I understand that any improper or inappropriate use of data in the University's information systems may result in the removal or access privileges and could also result in appropriate administrative action, including but not limited to disciplinary action and termination.
12. I have read the SRSU Information Security Policy and agree to assist in its enforcement.

***ORIGINAL SIGNATURES ARE REQUIRED**

USER SIGNATURE _____ / _____ ID _____ DATE _____
Signature Print Name

SUPERVISOR _____ / _____ DATE _____
Signature Print Name

***Your signature above signifies your agreement to abide by all data standards on this compliance statement.**

Revised: June, 2015

Appendix 9- SRSU Security Access Termination Request From

SRSU Security Access Termination Request

Please terminate all access to Banner (all instances), ImageNow, Argos, ftp and BCM

Name:

BANNER ID:

Faculty, Staff or Student:

Dept.:

Campus (ALP/RGC):

Email Address:

Phone:

Effective Date: _____

Reason for Termination*: _____

Supervisor:

*If the individual is transferring to another position or department please specify.

Banner Data Standards

Appendix 10- Document History

Number	Date and Sections	Author	Notes
Draft V2		T Graf	Updates from In for Sys
Ver 1.1	August 29, 2005	T Graf	Updates from Info Sys Meetings
Ver1.2	October 29, 2005	T Graf	Adopted Version by Info Sys Committee on October 22, 2005
Ver 1.3	April 4, 2006	M Edison	Updates from Finance implementation
Ver 1.4	May 9, 2006	M Edison	Updates to Address and Phone Types
Ver 1.5	Dec 6, 2013	D Gibson	Updates to Security Access Forms
Ver 1.5e	August 29, 2014	D Gibson	Updates to Security Request Form
Ver 1.6	October 9, 2015	E Herrera	Updates to 1.3, 1.6, and 1.7, Acknowledgement, and formatting.