Data Standards Manual

LEWIS @LEHIGH

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Please note: This html version of the data standards manual is a work in progress. Some standards are not yet included. Please see the Word version of the data standards manual for a complete listing.

SCT's Banner System is Lehigh University's integrated database. Within an integrated database various modules share data items; therefore it is necessary for shared data items to be entered and used in a definitive and consistent manner throughout all modules in order to preserve the data integrity of the database.

The purpose of this manual is to set forth the rules and policies established for the use of these shared data items and for data entry in general.

Data Standards

ID Number   Social Security Number
Name   Telephone Number
Addresses   Personal Information

ID Number

ID information will be maintained by all offices with the security privilege to allow them to create new persons/organizations.

This standard was developed in order to determine what identification number would be assigned to all persons/organizations entered into BANNER. The BANNER ID number is the key to all information within the BANNER system. The system provides the ability to use an already defined number or system generated number. A system generated number will be used as the primary identification number within BANNER. System generated numbers will begin with an "8". For example, a system-generated number would appear as: 800234598.

In the past, accounts receivable used an ID number identified by an "AR" followed by a sequential number. This ID number schema was used to identify 3rd party payees for student billing purposes. Although the numbers prefixed with 'AR' still exist in Banner, new records for 3rd party payees will be created following the existing data standard of a system generated number for IDs.

(Prior to May 1, 2004 Social Security number was used as the Banner ID number. Due to security concerns about using the Social Security number as the Banner ID, the ID standard was revised by the Lewis Steering Committee).

Contact Person: Mary Louise Powers

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Name Standards

Name information will be maintained by all offices with update capability.

Last Name
First Name
Middle Name
Name Prefix
Name Suffix
Non-Person Name
Name Change

Name Standards - Last Name

All information is typed in upper/lower case format, i.e., not all capital letters or all lower case letters.
All name information will be entered as submitted by person.

Hyphens may be used to separate double last names (i.e., Cooper-Smith). If there are two unhyphenated last names (i.e., Monica Lou Stevens Smith), Stevens Smith would be entered into the Last Name field.

Apostrophes may be used in such names as O'Leary, O'Conner, etc.
The period is not used in the last name field.
Commas are never used.

Do NOT use suffixes in the last name field. Banner has separate fields for both prefix and suffix located on the xPAIDEN form.
Examples: III, Jr., M.D., etc., should never be used in the last name field.

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Name Standards - First Name

All information is typed in upper/lower case format, i.e., not all capital letters or all lowercase letters. Always enter the entire first name when available even if the person prefers to use the initial of their first name and prefers their middle name.

All name information will be entered as submitted by person.

Hyphens and apostrophes may be used. Commas are never used

The period is used after a single character initial in the first name field only when all that is available is an initial: Single Character First Names should be entered with a period. In those cases where a single character is designated as first name, place the single character in the first name field followed by a period.
For example: S. Paul Smith would be entered as "S. Paul" into the First Name field.

Preferred First Name should be entered into the preferred name field. For example: S. Paul Smith, "Paul" would be entered into the preferred name field.

Spaces are permitted for double names, i.e., Mary Ann, Bobby Joe.

Do NOT use titles, prefixes, and suffixes in the first name field.
Examples: Dr., Mr., Mrs., should never be used in the first name field.

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Name Standards - Middle Name

All information is typed in upper/lower case format, i.e., not all caps or all lower case letters. Enter the entire middle name if available for identification purposes.
All name information will be entered as submitted by person.

Hyphens may be used to separate double names.
Apostrophes may be used.
Commas are never used.
The period will be entered in the middle name field for people providing only a middle initial.

Example: Person name is John A.H. Smith - a period is entered after both initials.
Last: Smith First: John Mid: A. H.

Example: Monica L. Stevens Smith
Last: Stevens Smith First: Monica Mid: L.

Spaces are permitted between multiple names.
Example: Mary Ann

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Name Standards - Name Prefix

If adding an individual for the first time and no prefix is specified, please enter Mr. as the default for all males and Ms. for all females. If gender is not available do not enter any prefix.
If name suffix of MD or PhD is used, **do not** enter name prefix of Dr.
List of accepted prefixes

Name Standards - Name Suffix

Enter a name suffix if submitted by the person.
List of accepted suffixes

Name Standards - Non-Person Name

All information is typed in upper/lower case format, i.e., not all capital letters or all lower case. Enter the full legal name of the non-person.

Hyphens may be used to separate double names.
Apostrophes may be used.
The period may be used.
Commas may be used.
Spaces are permitted between multiple names.

Examples:
Georgia-Pacific Foundation, Inc.
W.W. Grainger, Inc.
J.P. Morgan & Co. Incorporated

NOTE: An ampersand ("&") is used if it is part of the official name of the company, otherwise spell out "and".

Name Standards - Name Change

This standard was developed in order to provide maximum flexibility in accommodating name change requests by University constituents.
The areas that require some form of documentation prior to effecting a name change are HR, Payroll, and the Registrar's Office.
Admissions and Alumni do not require any formal documentation.

If the person requesting the name change has the employee box checked on the GUASYST form, the data entry person will call HR/Payroll to determine if the name change may be done. If HR/Payroll approves the change, the data entry person may proceed, otherwise the data entry person will need to contact the person in question and explain that the appropriate documentation required by HR/Payroll must be presented in order to make the name change.
In the situations where a name change is performed upon the receipt of the appropriate documentation, the hard copy documentation will be retained in the office performing the change for the agreed-upon timeframe. Any person requiring access to that hard copy documentation will use the activity date and user information stored in BANNER to determine from which office to request the documentation.

Admissions will be permitted to perform name changes without formal documentation as long as the person has information only in the Admissions or Recruiting modules of BANNER (as displayed on the GUASYST form).

Development will be permitted to perform name changes without formal documentation as long as the person has information only in the Alumni modules of BANNER (as displayed on the GUASYST form). Name changes for alumni/ae may also be performed (in this example the person would also display on the GUASYST form as having Student information).

Note: In order to maintain a historical record of the name at time of graduation for student transcripts, a transcript comment will be created at graduation listing the name under which the person graduated. All previous names are retained within BANNER and are searchable.

Address Standards

Address information will be maintained by all offices with update capability.

BANNER provides three lines for street address information for both person and non-person records. Three address lines will not print on one inch labels nor be viewable through a standard window envelope without adjustments to the font size. Use two lines whenever possible.

Addresses are classified by address type codes. Only one address per type may be active at any given time.
Valid address types are found in table STVATYP.
Temporary (TE) addresses must have a FROM and TO date specified.

Street
City
State
Zip Code

Nation
Foreign Address
Military Address
Change of Address

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Address Standard - Street

All information is typed in upper/lower case format.
Address information is entered as provided by the individual.
Avoid abbreviations unless necessary for space considerations. If it is necessary to abbreviate, see recommended abbreviations

Do not use periods or the # sign after abbreviations or after PO (i.e. PO Box 3232).
Symbols such as "%" (in care of) should not be used.
"In care of" should not be used.

Avoid using address line 3 whenever possible.
Example of multi-line address:

> *Dr. John F Smith*
> *Evergreen Building, 1379 Main St.*
> *PO Box 2351*
> *Bakersfield, CA 93311*

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Address Standard - City

Use the zip code to retrieve the Post Office approved city name.
All information should appear in upper/lower case format.
Punctuation is never used.

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Address Standard - State

Valid state/province codes are found in table STVSTAT.
Canadian Provinces are entered in the state field, not the city field. Canadian Provinces are:

Alberta	New Brunswick	Ontario
British Columbia	Newfoundland	Prince Edward Island
Labrador	Northwest Territories	Quebec
Manitoba	Nova Scotia	Saskatchewan
		Yukon

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Address Standard - Zip Code

Zip/postal codes must be entered for all US and Canadian addresses.

US Zip Codes
Enter the 5 digit zip code to retrieve the city, state, and county information.

A hyphen must be used when the entire 9 digit zip code is available.
If the last four digits are unavailable, enter the first five digits without the hyphen.

Examples:
97203-5798
97203

Canadian Postal Codes
Enter the 6 character postal code. Do not use spaces.
Examples: T2T2Y5   R2L1N4

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Address Standard - Nation Code

Nation code is not entered for US addresses.
Canada's Nation Code, CA, is entered for all Canadian Addresses.
All other foreign nation addresses must have a nation code.
Valid nation codes are found in table STVNATN.

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Address Standard - Foreign Address

Enter foreign addresses as closely as possible in the format provided by the individual.
Use discretion when a format change is necessary.

Avoid using address line 3 whenever possible.

For all foreign addresses, excluding Canada, enter the city name followed by the postal code.
Examples:
Street Line 1:   *Creek House, Fishery Road*
Street Line 2:   *Bray*
City: *Berkshire SL6-1UN*
Nation: *UK*

Street Line 1:   *706 Moostrasse*
City: *Salzburg A-5020*
Nation: *AU*

Canadian addresses must include the city in the City Field and the Province in the State Field. Enter CA (Canada) into the Nation field and the six character postal code in the zip code field.

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Address Standard - Military Address

The proper format for a military address is to enter APO (Army Post Office) or FPO (Fleet Post Office) in the city field, along with "AE" (mail going to Europe, the Middle East, Africa, and portions of Canada), "AP" (the Pacific) and "AA" (for the Americas and portions of Canada) in the state field; and then the ZIP Code.

AE - Europe, Middle East, Africa, Canada [ZIP=09nnn]
AP – Pacific [ZIP=96nnn]
AA - The Americas (excluding Canada) [ZIP=34nnn]

Examples:
Alice VanFrogulemen
HHB 6th Battalion 43rd Box 72
Air Defense Artillery CMR 417
APO AE 09602-8802

Air Force Base (AFB)

Enter the City into the City Field followed by AFB (all CAPS) for Air Force Base.

Example:
5 202A 2nd St
Elmendorf AFB
AK 99506-1207

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Change of Address

Student and employee address changes are handled by the Offices of the Registrar and Human Resources respectively. Change requests must be in writing, email is acceptable. Changes can also be requested from the web site.

Address changes are identifiable by user ID and activity date.

Change of Address Procedure

Check GUASYST to determine the individual's existence in other Banner modules.
Inactive the old address.
Click on the inactive check box AND enter yesterday's date in the *To* date field.
Enter new address information.
Enter source of change, if applicable.
Inactive duplicate addresses of the same type may be removed.

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Telephone Standards

Domestic Phone Numbers

International Phone Numbers

Domestic Phone Numbers

The telephone number is entered in 3 separate fields:
Area Code
Phone Number - Do not include a hyphen when entering the 7 digit phone number. *Example: 2837900*
Extension (if necessary) - Do not enter X or EXT in the extension field, enter the extension number only. Use the unlisted check box to indicate an unlisted phone number. This allows unlisted phone numbers to be excluded from reports.

Enter the Telephone Type. (Double click in type field to see valid values).

International Phone Numbers

Enter the international phone number in the block marked International .
Enter the phone number as provided by the person, using dashes (instead of spaces) to separate the number sequence.
Examples:
44-171-370-0173
82-2-766-9704
44-0-765-620203 The comment field may also be used to record any helpful information related to the phone number.

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Social Security Number

This standard was developed in order to accommodate the need to update Social Security Number (SSN) information. The SSN information is used primarily for Payroll and Financial Aid in accordance with Federal regulations.
The areas that require some form of documentation prior to changing SSN information are HR, Payroll, Financial Aid and the Registrar's Office. The required documentation is an original Social Security Card. Admissions and Alumni do not require any formal documentation.

Social Security Number Change

The BANNER SSN change will be done only after the data entry person has determined under which systems a person has information using the GUASYST form. The GUASYST form lists the BANNER systems that contain information about a person/organization. If the person for whom the changes are being made has information in the Human Resources module (as displayed on the GUASYST form), the data entry person will NOT perform the change and will refer the person to the Payroll Office. This will allow the payroll office to maintain the copies of the Social Security card as required by law for all current or past employees.

Admissions will be permitted to correct the SSN without a copy of the Social Security Card as long as the person has information only in the Admissions or Recruiting modules of BANNER (as displayed on the GUASYST form).

Financial Aid will be permitted to correct the SSN with a copy of the Social Security Card as long as the person does not have information in the Human Resources module of BANNER (as displayed on the GUASYST form).

The Registrar's Office will be permitted to correct the SSN with a copy of the Social Security Card as long as the person does not have information in the Human Resources module of BANNER (as displayed on the GUASYST form).

No other areas will be permitted to change Social Security Numbers.

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Personal Information Maintenance

　　　　A change in personal information may need specific documentation and some information may be changed only by a specific office. Refer to the items below (listed alphbetically) for the standard pertaining to that item. To change a personal item in the Student module, the form is SPAPERS; in the HR module, it is the Biographic Information/Additional Information SubForms of PPAIDEN. The information in these forms is shared across all Banner modules and enables one to see the data for all people. MAINTAINING CONFIDENTIALITY OF THE DATA IS VERY IMPORTANT!

Citizenship Indicator – This fields designate US citizenship status. Valid entries are : "Y" for citizen, "N" for non-citizen, "P" for permanent resident, and "U" for unknown.

Confidentiality Indicator – In the student module, this indicator is used in conjunction with the SPACMNT

Comment Form. The Comment Form is used to indicate the nature of the confidentiality and the department placing the confidentiality indicator on the record. This is changed ONLY by the department originating the confidentiality flag.

Date of Birth – No documentation is required to change the month or day of birth. A change to the year requires acceptable documentation; passport, birth certificate, or driver's license.

Deceased Indicator – This field, along with the Date of Death field is updated only with official proof of death, i.e. legal newspaper obituary, death certificate.

Ethnicity – A change from unknown to an ethnicity does not require formal documentation. A change from one ethnicity to another requires an official document with the individual's ethnicity listed.

Gender – A change from unknown to male or female requires no additional documentation. A change from male to female or female to male requires the individual to provide acceptable documentation; passport, birth certificate, or driver's license.

Legal Name – This field is used only by the Office of Human Resources and the Payroll Office to record the name as it appears on an individual's Social Security Card. This field is changed ONLY by the Office of Human Resources and the Payroll Office.

Marital Status – First determine via the GUASYST form whether or not the individual is an employee. If the individual is an employee, the change must be made by either the Office of Human Resources or the Payroll Office with the appropriate documentation.

Religion – This field may be changed by anyone with update access. No documentation required.

Veteran Information – These fields are maintained ONLY by the Office of Human Resources.

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