DATA ENTRY STANDARDS MANUAL FOR BANNER USERS

Table of Contents

DATA ENTRY STANDARDS MANUAL FOR BANNER USERS ............................................ 1 FACULTY, STAFF, STUDENT, ALUMNI OR CONSTITUENT IDENTIFICATION NUMBERS IN COMMUNICATIONS ...................................................................................... 3 SOCIAL SECURITY NUMBERS ON SPAPERS .................................................................... 3 DECEASED NOTATION ON SPAPERS ................................................................................. 3

COMMON MATCHING................................................................................................................ 6 BANNER SEARCH PROCEDURES ............................................................................................ 7 PERSON SEARCH PROCEDURES ......................................................................................... 7 NON-PERSON SEARCH PROCEDURES - ............................................................................. 8 GENERAL NAME RULES ......................................................................................................... 10 DATA CUSTODIANSHIP ........................................................................................................... 12 NAME STANDARDS .................................................................................................................. 14 NAMES – General Standards ................................................................................................... 14 LAST NAME ............................................................................................................................ 15 FIRST NAME ........................................................................................................................... 15 PREFERRED FIRST NAME ................................................................................................... 15 MIDDLE NAME ...................................................................................................................... 15 PREFIX ..................................................................................................................................... 16 SUFFIX ..................................................................................................................................... 16 CORPORATION / THIRD-PARTY PAYERS (FTMVEND) ................................................. 17 SAIL SELF – SERVICE ADDRESS UPDATES ........................................................................ 18 INTERNATIONAL STUDENTS:................................................................................................ 20 ADDRESS TYPES: The specific field of data governed by this ownership is the address. ... 22

TELEPHONE TYPES: This specific field of data governed by this ownership is the telephone. .................................................................................................................................. 24 INSERTING AND/OR INACTIVATING PHONE NUMBERS............................................. 27

ADDRESS STANDARDS ........................................................................................................... 27 STREET ADDRESS ................................................................................................................. 41 CITY ......................................................................................................................................... 42 STATE/PROV. ......................................................................................................................... 42 COUNTY CODE ...................................................................................................................... 42 ZIP CODE ................................................................................................................................. 42

INTERNATIONAL ADDRESSES .............................................................................................. 43 UNIVERSITY HOUSING (UH) ADDRESSES .......................................................................... 45 UPDATING STUDENT, ALUMNI OR CONSTITUENT ADDRESSES USING SPAIDEN, APAIDEN, FOAIDEN OR PPAIDEN ......................................................................................... 46

HOLD 04 FOR MISSING ADDRESSES ................................................................................ 47 ....................................................................................................................................................... 47 CAMPUS OFFICE (OF) ADDRESS AND OFFICE ADDITIONAL (OA) ADDRESS FOR EMPLOYEES ............................................................................................................................... 48

STREET ADDRESS ................................................................................................................. 49 CITY ......................................................................................................................................... 49 STATE/PROV .......................................................................................................................... 50 COUNTY CODE ...................................................................................................................... 50 ZIP CODE ................................................................................................................................. 50 NATION ................................................................................................................................... 50 PHONE NUMBER ................................................................................................................... 50 FROM DATE............................................................................................................................ 50 SOURCE ................................................................................................................................... 51

Data Entry Standards Manual for Banner Users

E-MAIL ADDRESSES ................................................................................................................. 51 PREFERRED INDICATOR ..................................................................................................... 52 ADDRESS DATA AND REPORT WRITING ........................................................................... 52 CLEAN ADDRESS SOFTWARE ............................................................................................... 53

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 2 of 55

Data Entry Standards Manual for Banner Users

CONFIDENTIALITY/RELEASE OF DIRECTORY INFORMATION

When you first access a record that has been marked confidential, you will see the following message: "Warning: Information about this person is confidential." This tells you that the student has requested privacy under FERPA. You must not release ANY information about that student, including the fact that the student appears in our database. Even directory information must be withheld. If sending mailings, these records must be excluded except when the mailing is directly related to the person's academic program.

FACULTY, STAFF, STUDENT, ALUMNI OR CONSTITUENT IDENTIFICATION NUMBERS IN COMMUNICATIONS

 Do not store any faculty, staff, student, alumni or constituent’s Social Security Number (SSN) outside of approved systems or transmit any part of it via e-mail  Only identify faculty, staff, students, alumni or constituents using First Name, Last Name, and last four digits of the Grizzly ID number via e-mail, web calendars, and in printed reports that might be seen by parties outside of the University

SOCIAL SECURITY NUMBERS ON SPAPERS

ONLY SSN / ITIN’s are to be entered into the SSN/SIN/ITN field on SPAPERS. DECEASED NOTATION ON SPAPERS

Alumni or Constituent Deceased Notification –

University Advancement:

 If a notification is received through some means - letter, phone call, obituary notice in the paper and is not official in nature, i.e. an obituary notice, follow up by checking with the following websites:

a) http://www.genealogybank.com/gbnk/ssdi/ - Free, no membership required, and preferred one used by University Advancement

b) http://www.nationalobituaryarchive.com/ - Free and no membership required c) http://www.obituaries.com/ns/obituariescom/obits.aspx - Free and no membership required

d) http://deathnotices.michigan.com - Free and no membership required e) www.ancestry.com – Free 14 day trial, but monthly membership fees assessed after trial period

 If more verification is needed, check the following:

a) Check to see that the name is an EXACT match

b) Check the age of the person

c) Check to see if the city in which the person lived is a match

d) Contact the funeral home

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 3 of 55

Data Entry Standards Manual for Banner Users

 If you cannot verify the death, do not code the record as deceased but refer the information to the University Advancement Division at 248-364-6110 or giftacct@oakland.edu who will conduct further research, make the changes and will complete additional steps as stated in the Advancement Procedure manual.

 If proper notification or verification has been found continue with the instructions below to code the record.

a) Go to the form %AIDEN

b) Enter the I.D. number or search for the correct I.D. (Even if you have an I.D., do a name search to make sure there isn’t a duplicate record.)

c) Click on the “Biographical” tab.

d) Click on the “Deceased” indicator box (a check mark will appear). e) Enter the deceased date if known.

f) Save the record.

g) Go to the “address” tab in the %AIDEN and inactivate the record holder’s address.

Once the record is coded as deceased, a Banner Workflow e-mail will automatically be generated. This e-mail will notify:

Academic Human Resources ahr@oakland.edu Academic Records acadrec@oakland.edu Advancement Services advanceservices@oakland.edu Annual Giving give2ou@oakland.edu Benefits benefits@oakland.edu Gift Accounting giftacct@oakland.edu Graduate Study gradstudy@oakland.edu Housing housing@oakland.edu International Students & Scholars isso@oakland.edu Office of Institutional Research & Assessment oira@oakland.edu Payroll payroll@oakland.edu School of Education & Human Services sehs@oakland.edu Stewardship give2ou@oakland.edu Student Business Services collect@oakland.edu Undergraduate Admissions SAT@oakland.edu University Communication & Marketing oumag@oakland.edu

| University Human Resources  | uhr@oakland.edu |
| --- | --- |

The Gift Accounting staff will be reviewing all Alumni and Constituent records that were coded as deceased to insure that the deceased procedure was followed.

Employee Deceased Notification:

 If an employee receives notification that an employee is deceased, refer to Policy 455 Death of Faculty, Staff and Retiree and Floral Tributes

 Upon notification, AHR and UHR will inactivate any active (00) Local, (01) Primary, (HR) Human Resources, and (OF) Office addresses. (Note: inactivating

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 4 of 55

Data Entry Standards Manual for Banner Users

active addresses prevent the address record from being included in Access query output for mailings.)

Student Deceased Notification:

 If an employee receives notification that a student is deceased, any pertinent information (obituary, etc.) should be forwarded to the Office of the Registrar - Academic Records so that the death can be confirmed and the student record appropriately updated including inactivating all active addresses. (Note: inactivating active addresses prevent the address record from being included in Access query output for mailings.)

 If a request is made from a person who has a deceased warning, refer the student to the Office of the Registrar. DO NOT TELL THE STUDENT THAT THERE IS A DECEASED WARNING ATTACHED TO THEIR RECORD.

 When a person marked as deceased requests records and neither the Registrar nor Alumni Office has any documentation substantiating the death, the deceased notation should be removed.

 If a request is made from a person for whom one of these offices has documentation of the death, direct the student to the Office of the Registrar. That office can request advice from General Counsel. General Counsel will tell them how to proceed.

Applicant/Pre-Student Deceased Notification:

 The following applies to persons with admissions application records and no registration records. If registration records exist, please refer to the Student Deceased Notification section above.

 If an employee receives notification that an applicant (prior to enrollment in the University) is deceased, any pertinent information (obituary, etc.) should be forwarded to either the Undergraduate Admissions Office or the Office of Graduate Study, depending on the type of application, so that the death can be confirmed and the applicant record appropriately updated including inactivating all active addresses. (Note: inactivating active addresses prevent the address record from being included in Access query output for mailings.)

 If a request is made from a person who has a deceased warning, refer the student to either the Undergraduate Admissions Office or the Office of Graduate Study. DO NOT TELL THE STUDENT THAT THERE IS A DECEASED WARNING ATTACHED TO THEIR RECORD.

 When a person marked as deceased requests records and neither the Undergraduate Admissions Office nor the Office of Graduate Study has any documentation substantiating the death, the deceased notation should be removed.

 If a request is made from a person for whom one of these offices has documentation of the death, direct the student to the Undergraduate Admissions Office or the Office of Graduate Study. That office can request advice from General Counsel. General Counsel will tell them how to proceed.

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 5 of 55

Data Entry Standards Manual for Banner Users

COMMON MATCHING

Common Matching is a feature in Banner that assists in creating and managing basic person information in order to prevent the creation of duplicate records. The Common Matching process checks for existing person and company identification records by searching through the database and identifying every account that matches the Core Matching Elements before a new record is added to the database. Each department that creates Banner ID numbers determine the Core Matching Elements that they will use for identifying a potential match and build the rule set in Banner. Core Elements may include Name/ID, Address, Telephone, E-mail, Date of Birth, Gender, SSN, etc.

Common Matching will check the entire database of Banner ID numbers and display potential matching Banner ID data including Name, Address, Telephone, E-mail, Date of Birth, Gender, and or SSN, prior to the creation of a new Banner ID number. To start a search in GOAMTCH the only information that needs to be filled out is the Last Name field. If the First Name field is filled in with information, Common Matching will match that entry against a list of common names (GORNAME) synonymous with the First name provided. For example, Jon Smith will match to John Smith.

If enough of the fields match with an existing record, Common Matching will classify that record as a Match or Potential Match and ask you to verify the record. In the example below the First Name, Last Name and SSN matched to only 1 record, the record is listed in the Match section. The system also listed 55 records as potential matches because they contain either the First Name, Last Name or last 4 digits of the SSN.



 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 6 of 55

Data Entry Standards Manual for Banner Users

BANNER SEARCH PROCEDURES

General Search Procedures:

Search Banner thoroughly before:

1. Entering a new person or non-person record to ensure that a duplicate record is not created.

2. Making changes to an existing record to ensure you are updating the correct record.

If a Banner ID number (Grizzly ID or Vendor ID) is available, enter it, and then compare the following information to ensure your record is unique or correct: - Grizzly ID

- Date of Birth

- Address and/or phone number

- E-mail address

- Middle Initial

- Federal ID number (SSN, EIN, or TIN) (if you have access to view the number) PERSON SEARCH PROCEDURES

 If a Banner ID number is available, enter it in the ID field in the %IDEN form (SPAIDEN, PPAIDEN, FOAIDEN or APAIDEN) and alt-page down (next block). Double check to be sure you have found the correct record. Click on the “…” at the end of either First Name or Last name. The message, “\*Warning\* Similar names exist. Would you like to view them?” appears. Click on the %IDEN option to view the listings. If a Banner ID is not available or no match is found, then proceed to the next step.

If a Banner ID number is not available, within the key block (area at top of form where ID/name is displayed) of %IDEN; tab once, type in the name (Last Name, First Name) and press tab. Wildcard characters can be used to expand your search if needed: “%” matches a string and “\_” matches a character. If a social security number is available and one match is found, double check to be sure you have found the correct record. If there is more than one potential match, the ID and Name Extended Search dialog box opens up. When you click the down arrow after the Results field, you can scroll through all the matches. If you have middle initial or the last 4 digits of the Banner ID number, you can potentially identify the correct one from the list. You also have the option to reduce the search by person or non-person. This search by name works on other non- %IDEN forms.

 If you do not have the first and last name, in %IDEN, place the cursor in the ID field and press F9 (the Person Search Form (SOAIDEN) appears), or click “…” next to the ID field and select one of the available search options.

o If you have the last four digits of the persons Banner ID number, then type %#### in the ID field where the #### is the last four digits. Then tab over the Last Name field and enter the Last Name. Press the F8 key or the “Go” button to start the search. If a potential match is not found, then,

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 7 of 55

Data Entry Standards Manual for Banner Users

o In the Last Name field, type in the first few letters of the Last Name followed by the percent sign (%) and the first letter or first few letters of the First Name followed by the % sign (Example: Smi%, J%) and press the F8 key or the “Go” button to search. Verify that the Case Insensitive Query radio button is selected. If you find more than one possible match, try the detailed search.

 From the search form, select Search and Display More Detail

(SOAIDNS) using the Related menu. The name will appear on the detail search form. Press F8. Address information and student

data will appear in different blocks of the form. Scrolling through

the various types of data may help you to identify the specific

record you need. If the record you are querying is not a match, exit the detail form and select the next record in the list.

o The Change Indicator column provides information regarding name and ID changes. If a “Name” appears in the column, the “person” has had a name change in Banner. If an “ID Change” appears in the column, the “person” has had an ID change in Banner. You may select either record that appears for a “person” and the most recent information will be displayed.

o Use the Search Using Sounds Like in the Options menu to search for familiar sounding last names such as St, Saint and Mac, Mc.

o Try reversing first and last names for foreign names when conducting person searches.

o For a person with a hyphenated last name, use the full hyphenated name and each individual name separately. Example: If searching for Jenny Smith-Jones, the search should be performed three times using Last Name = “Smith-Jones”, Last Name = “%Smith%”, and Last Name = “%Jones%”.

o If a match is still not found, perform another search as described above using a previous or maiden name, if available.

 If a match is found, select the person from the query results by double clicking on the name or using the select button.

 If no match is found, but you have reason to believe the person/entity has had a prior relationship with the university (student, employee, or constituent), contact the appropriate office before creating a new person / entity record on the appropriate Identification or Vendor Maintenance form for the module in use.

NON-PERSON SEARCH PROCEDURES -

 If a Banner ID number is available, enter it in the ID field in the %IDEN form (SPAIDEN, PPAIDEN, FOAIDEN or APAIDEN) and alt-page down (next block). Double check to be sure you have found the correct record.

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 8 of 55

Data Entry Standards Manual for Banner Users

If a Banner ID number is not available, within the key block (area at top of form where ID/name is displayed) of %IDEN; tab once, type in the name (Business Name or a partial business name) and press tab. Wildcard characters can be used to expand your search if needed: “%” matches a string and “\_” matches a character. You also have the option to reduce the search by non-person.

 If you do not have the full business/non-person name, in %IDEN, click “…” next to the ID field and select one of the available search options (Non-Person Search - SOACOMP).

o If you have the last four digits of the non-persons Banner ID number, then type %#### in the ID field where the #### is the last four digits. Press the F8 key or the “Go” button to start the search. If a potential match is not found, then,

o In the Name field, type in the first few letters of the Business/Non-Person Name followed by the percent sign (%) (Example: %Health% or

Physical%) and press the F8 key or the “Go” button to search.

 If a match is found, select the non-person from the query results by double clicking on the name or using the select button.

 If no match is found, but you have reason to believe the entity has had a prior relationship with the university (constituent or vendor), contact the appropriate office before creating a new entity record on the appropriate Identification for the module in use.

VENDOR SEARCH PROCEDURES

 Go to the FTMVEND form.

 Click on the vendor search arrow. This will take you to the FTIIDEN form.  Tab to the Last Name field and key in the required information as follows: a. A meaningful portion of the vendor name with the wild card “%” before and after as necessary. This field is case sensitive

Example: SmithGroup could be entered as

 %Smith%Group%

b. Execute the query (press F8).

c. If the entity is found, double click on the vendor number to select. This will bring Banner back to FTMVEND with the vendor selected. Perform a next block (press CTRL PgDn). Click on the “Address” tab and look up appropriated purchase order (“PO”) or pay to (“PT”) address by scrolling. If the correct address is not associated with the vendor:

i. To request a new PO address, contact Purchasing

ii. To request a new PT address, attach a completed Vendor

Maintenance Form to your payment voucher and send to Accounts Payable.

iii. If the correct address is listed, you can use the vendor number, address type and sequence on your paperwork.

d. If searching for a person (as a vendor), follow the same procedure using the person’s last name. If the vendor does not appear, you can search on “all” Banner entities by rolling back using the “Rollback Button”. After this,

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 9 of 55

Data Entry Standards Manual for Banner Users

check the box next to “all” at the top of the form. Perform a next block. The form will go into query mode after a minute. You can then perform steps a – c again.

e. When searching for a vendor under a “government name”, if the vendor name begins with a phrase such as “Department of . . .” the government name should precede the phrase.

i. Use the wild card “%” before and/or after part of the name as

necessary. This field is case sensitive.

Example: State of Michigan Depart of Agriculture

City of Pontiac Dept of Agriculture could be

entered as State%of% or %Depart% or

Department of%

Prior to adding a new vendor, perform a search on FOAIDEN using either FOIIDEN or FOICOMP to make sure the entity is not in Banner already as a student, alumnus, employee or third-party. FOICOMP will also perform a non-case sensitive search to identify different forms of a non-person name.

For example: SmithGroup or Smithgroup

GENERAL NAME RULES

 All departments agree to use the standard rules of data entry for all Banner modules.

 All data entered into a field should be entered using uppercase and lowercase letters. All uppercase or all lowercase letters should never be used, except in the case of formal business names. (e.g. ‘IBM’ or ‘priceline.com’).

 Abbreviations should not be used when entering data unless specified in this document.

 Departments should only make name changes to records owned by them unless otherwise specified in this document.

 For all name change requests, the employee processing the name change must check the System Identification form, GUASYST, to see if the person is a student, financial aid applicant, alumni and/or employee. If you are not sure that you are authorized to change a name – DON’T CHANGE IT.

 If a person has requested use of a preferred name, but has not legally changed their name, the legal name cannot be changed. Only the preferred name field can be changed to reflect this request.

 For an employee, the name MUST be entered in Banner as it appears on the employee’s Social Security Card. If the employee’s current name is not reflected on his/ her Social Security Card, they will be instructed to visit the Social Security Administration office to change the name and return with the new card before the name change can be processed.

 For students who are not employees or federal aid recipients, a certified marriage certificate, divorce decree, U.S. Passport or Official US Court Change of Name document authorizing the name change must be presented.

 Name changes for international students require a change in immigration documents. As a general rule passports, immigration documents, social security

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 10 of 55

Data Entry Standards Manual for Banner Users

cards, and student record names must all match. Name changes must be made with the International Students and Scholars Office (ISSO).

 Accounts Payable, Financial Aid, University Human Resources, Office of the Registrar, Purchasing, International Students & Scholars Office (ISSO) and University Advancement are the only areas that make name changes.

Note: The Graduate and Undergraduate Admissions Office will make a name change based on a telephone call IF the student has not registered or created accounts receivable transactions.

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 11 of 55

Data Entry Standards Manual for Banner Users

DATA CUSTODIANSHIP

Custodianship means who ‘owns’ the data; owners have update capabilities; owners are to be contacted regarding any issues with that data. The Shared Data Committee finalizes all data entry standards with the approval of the custodian.

If the PERSON/ENTITY is a: then the custodian of the NAME is: International Student International Students & Scholars Office (ISSO)

Financial Aid Recipient Financial Aid

Office of the Registrar

Payroll

School of Medicine

University Human Resources (UHR)

Staff Employee University Human Resources (UHR)

Student Employee Financial Aid

Office of the Registrar

Faculty/Research Employee Academic Human Resources

Student Applicant Admissions

Office of the Registrar

Graduate Office

School of Medicine

Enrolled Student Office of the Registrar

Undergraduate Admissions

Graduate Admissions

School of Medicine

Vendor Purchasing

Accounts Payable

Student Business Services

Former Student (not an OU graduate)

Alumnus/Alumna (OU Graduate)

Office of the Registrar School of Medicine

Advancement Services Office of the Registrar School of Medicine

Constituent Advancement Services

Graduate Assistant Graduate Office

Office of the Registrar

| Alumni (Employee)  | Advancement Services University Human Resources (UHR) Office of the Registrar  |
| --- | --- |

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 12 of 55

DATA CUSTODIANSHIP OF NAMES

Only custodians are allowed to make name changes when they are presented with the required paperwork.

The specific field of data governed by this ownership is the name. Name changes only. INTERNATIONAL STUDENT

Name changes for international students require a change in immigration documents. As a general rule passports, immigration documents, social security cards, and student record names must all match. Name changes must be made with the International Students and Scholars Office (ISSO), 157 North Foundation Hall, 248-370- 3358.

FINANCIAL AID RECIPIENTS

Changing names on financial aid student records: the LAST name of a financial aid student MAY NOT BE CHANGED regardless of documentation unless the student has first made the change with the Social Security Administration.

Some changes, such as the spelling of a first name or middle initial do not result in a problem for financial aid and should be allowed with submission of the proper ID such as a driver's license. It is just very important that the last name not be changed until the change has been made with the Social Security Administration (NOT the IRS).

NAME TYPES

Alumni Requested (AREQ)

Only used by University Advancement. This type is used when an Alumni changes their name with OU based on a gift or pledge or

Alumni membership and legal documentation for the name change is not provided.

Maiden (MAID) Currently, only University Advancement is using this type. Use this name type on the original name when a name change is processed due to marriage and you know it to be the maiden name.

Student Name (STDN)

 Used by University Advancement and the Registrar’s Office. This type is used when an Alumni changes their name with OU based

on a gift or pledge or Alumni membership and legal documentation for the name change is not provided and should be made in

conjunction with AREQ (above).

If the alum does not want to provide the necessary documents to

have their transcript printed in their current name, this procedure

allows the registrar’s office to issue a transcript in their student

name.

 Name changes for international students require a change in immigration documents. As a general rule passports, immigration documents, social security cards, and student records names must all match. Name changes must be made with the International

Data Entry Standards Manual for Banner Users

Students and Scholars Office (ISSO), 157 North Foundation Hall, 248-370-3358.

NAME STANDARDS

Name changes are only allowed by data custodians in conjunction with the proper paper work.

The following forms are used to enter and change name information. The form used depends on the Banner module in use.

Form Module

SPAIDEN Student

PPAIDEN Human Resources

FTMVEND Finance (vendors)

FOAIDEN Finance

| APAIDEN  | Advancement/Alumni |
| --- | --- |

The available fields on the above forms include Last Name, First Name, and Middle Name. Prefix, Suffix, and Preferred First Name appear only on SPAIDEN, PPAIDEN and APAIDEN.

REMEMBER THAT ALL OF THE GENERAL NAME AND ADDRESS RULES APPLY TO THE ABOVE FORMS

NAMES – General Standards

Acceptable characters for use in name fields (last, first, middle) include:

 Latin characters A-Z, a-z

 Expanded accented Latin Characters supported by Banner Common Matching and search:

ÀÁÂÃÄÅÇÈÉÊËÌÍÎÏÑÒÓÔÕÖØÙÚÛÜÝàáâãäåçèéêëìíîïñòóôõöøùúûüý  Hyphen

 Space

 Apostrophe

 Period

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 14 of 55

LAST NAME

 Maximum field length is 60 characters

 Hyphens may be used to separate hyphenated last names with no spaces. If there are two last names that are not hyphenated, the two names would also be placed in the last name field with a space between the two names.

o Example: Mary Ann Smith Lee

 Mary = First Name

 Ann = Middle Name

 Smith Lee = Last Name

 In an alpha sort, this person would appear with the ‘S’ names.

FIRST NAME

 Maximum field length is 60 characters.

 In cases where a single character is designated as the first name followed by a full middle name, place the single character and the middle name in the first name field. o Example: E Evelyn Smith

 E Evelyn = First Name

 blank = Middle Name

 Smith = Last Name

 Spaces are permitted between multiple names. If an individual has two names in their first name and you can tell because a middle initial has also been provided, both names should be entered in the first name field with a space between the names.

o Example: Anne Marie S Smith

 Anne Marie = First Name

 S = Middle Name

 Smith = Last Name

 If two names are provided and no middle initial is provided, enter the “first” name in the first name field and the “second” name into the middle name field. o Example: Anne Marie Smith

 Anne = First Name

 Marie = Middle Name

 Smith = Last Name

PREFERRED FIRST NAME

 Maximum field length is 60 characters.

 If no Preferred First Name is provided, leave the field blank.

 Preferred First Name is for information only, it does not appear on Banner reports.  Spaces are permitted for double first names such as Ruth Ann or Billy Joe.  Not generally used.

MIDDLE NAME

 Maximum field length is 60 characters.

 If no middle initial is provided, leave the field blank.

 Periods following middle initial are acceptable, but not recommended.  Spaces are permitted between multiple names.

 Do NOT use title, prefixes, or suffixes in the Middle Name field.

Data Entry Standards Manual for Banner Users

PREFIX

 Maximum field length is 20 characters.

 Prefixes should not be used for students, employees, alumni, or constituents  The field may be left blank.

 Punctuation should not be used for prefixes.

The following chart provides examples of acceptable prefixes:

Prefix Description

1st Lt First Lieutenant

Atty Attorney

Br Brother

Capt Captain

Cmdr Commander

Dr Doctor

Fr Father

Hon Honorable

Lt Col Lieutenant Colonel

Maj Major

Ms Either Married or Single Status

Miss Single Status

Mr Mister

Mrs Married Woman

Pres President

Prof Professor

Rabbi Rabbi

Rep Representative

The Rev The Reverend

Sr Sister

| VP  | Vice President |
| --- | --- |

SUFFIX

 Maximum field length is 20 characters.

 The field may be left blank.

 Punctuation should not be used for suffixes; however, Banner will display commas when viewed.

Suffix Description

CPA Certified Public Accountant

II \*\* The Second

III \*\* The Third

IV \*\* The Fourth

DDS Doctor of Dentistry

DVM Doctor of Veterinary Medicine

| JD  | Jurist Doctor |
| --- | --- |

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 16 of 55

Data Entry Standards Manual for Banner Users

Jr \*\* Junior

LLD Doctor of Law

MD Doctor of Medicine

PhD Doctor of Philosophy

RN Registered Nurse

Sr \*\* Senior

Esq Esquire

| DO  | Doctor of Osteopathic Medicine |
| --- | --- |

\*\* Denotes the only suffixes that should be used for students. CORPORATION / THIRD-PARTY PAYERS (FTMVEND)

 All vendors who are not individuals and all third-party payers should be entered in the corporation field.

 Maximum field length is 60 characters.

 Use the complete vendor name, including the words “The”, “And”, “An”, etc.

 Use standard capitalization rules, except when part of a company name. o Example: ‘RSKCo Claims Services Inc’ or ‘eBay Inc’

 Departments need to reflect the legal name of a company on any documents submitted for vendor maintenance in Banner, such as the Vendor Maintenance form or a Purchase Requisition. As such, do not omit any words or suffixes denoting the legal form of the entity.

o Example: Inc, Incorporated, Corp, Ltd, Limited, PC, or LLC

 If a government name begins with a phrase such as “Department of …” the government name should precede the phrase.

o Example: US Department of Agriculture

 No spaces should be entered in the corporation field for names such as AT&T Wireless, MacArthur, or VonDubrow.

 To conform to postal regulations, do NOT use periods unless for an internet company.

o Example: priceline.com

 Do not use commas in the corporation field, except for constituents.  Hyphens and apostrophes should be entered when appropriate.

 Do not abbreviate the first word, with the exception of St (Saint) and US (United States).

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 17 of 55

Data Entry Standards Manual for Banner Users

The table below identifies abbreviations that may be used for other than the first word of a corporation’s name:

Abbreviation Word

Admin Administration

& And

Assn Association

Co Company

Corp Corporation

Dept Department

Inc Incorporated

Intl International

Ltd Limited

Mfg Manufacturing

| Natl  | National |
| --- | --- |

SAIL SELF – SERVICE ADDRESS UPDATES

Students, faculty, and staff may submit their address changes online through the secure SAIL system using the Personal Information Link. The SAIL system allows convenient 24/7 online access from anywhere with an internet connection as well as keeping information safe and secure through a password protected system. Online address changes through the secure SAIL system is the university’s preferred way for faculty, staff and students to submit their address changes.

If an alumni or constituent who is not an OU employee, faculty or current student requests a change to his/her Primary 01; they will most likely not know their login information and not be able to access SAIL. Instead, refer them to University Advancement at 248-364-6110 or giftacct@oakland.edu who will make the changes.

The address types are available for online viewing and / or updating are set on the Address Role Privileges table GOAADRL in Banner. As of December 2018, the settings were as follows:

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 18 of 55

ROLES:

ALUMNI EMPLOYEE FACULTY FRIEND STUDENT FINAID

Address

Type Description Comment Display

Only Update Display

Only Update Display

Only Update Display

Only Update Display

Only Update Display

Only Update

00 Local X X X 01 Primary X X X X AT Applicant Tracking

B2 Secondary BU-Univ

Adv use only

BI Billing No longer used

BU Business X

DI Diploma Address Not used

FO Foreign-for INS

reporting only X X X X

GR Granting Agency

HR Human Resources X X X LB Library

MA Mailing Not used

OA Office Additional X X

OF Campus Office X X

PA Parents

PO Purchase Order X X

PT Pay To X X

SE Seasonal X

UH University Housing X X Reserved for

TGRFEED Use Only Do not use

 Oakland University Revised Date: TBD Data Entry Standards Manual 19 of 55

GENERAL ADDRESS RULES

INTERNATIONAL STUDENTS:

If the student has a Foreign (FO) type they are an international student. SEVIS rules require that the International Students Office (ISSO) report addresses for international students (00, 01, HR, FO). International students are required to keep the International Students Office informed of any change of address.

YOU MAY CHANGE the (00), (01), AND (HR) address types for these students. DO NOT CHANGE the FO type.

All FO address type changes must be made by the ISSO office. If you make changes to the 00, 01 and/or HR address type, refer any student with an FO address type to the International Student and Scholars Office (ISSO) at 248-370-3358 or isso@oakland.edu to be sure their current information is on file.

ADDRESS CHANGES:

If an individual (other than an alumni or constituent who is not an OU employee, faculty or current student) requests a change to his/her Primary 01, Local 00 or Human Resources HR address, refer them to SAIL Self Service to make the changes. Remind them that they will need to review and update all three address types as necessary.

If an alumni or constituent who is not an OU employee, faculty or current student requests a change to his/her Primary 01, refer them to University Advancement at 248- 364-6110 or giftacct@oakland.edu to make the changes. They will need to review and update all three address types as necessary.

If an OU employee, faculty, or staff member requests a change to his/her Primary 01, Local 00, Office OF or Human Resources HR address, refer them to SAIL Self Service to make the changes.

Online address changes through the secure SAIL system is the university’s preferred way for OU students, employees, faculty, or staff members to submit their address changes.

If you have returned mail or an address change report from an external agency review with the Primary 01, Local 00, and Human Resources HR address, update all three address types as necessary.

ALUMNI WHO ATTENDED OU AS INTERNATIONAL STUDENTS:

YOU MAY CHANGE the (00), (01), AND (HR) address types for these alumni and constituents. DO NOT CHANGE the FO type.

All FO address type changes must be made by the ISSO office. The ISSO will use an audit process to review on a regular basis if the 00, 01 or HR address has been changed on an International Student who is an Alumni (graduate of OU) to be sure their current information is on file.

 Oakland University Revised Date: TBD Data Entry Standards Manual 20 of 55

If an alumni or constituent requests a change to his/her Primary 01, or Human Resources HR address, or if you have returned mail or an address change report from an external agency, review the Primary 01, Local 00 and Human Resources HR address and update each address type as necessary. In most cases, Alumni and constituents will not have access to SAIL Self Service to make the changes themselves.

HOUSING ADDRESSES:

University Housing (UH) contains residence hall addresses. NEVER change these addresses, even if the student says they have already moved out. Students should contact University Housing at 248-370-3570 or housing@oakland.edu if they are concerned about their housing address.

PERMANENT ADDRESSES:

Primary addresses 01 should never contain residence hall addresses or P.O. boxes. Oakland University must have a valid primary address. Alumni and constituent records may have a P.O. Box as part of their 01 address.

 Oakland University Revised Date: TBD Data Entry Standards Manual 21 of 55

DATA CUSTODIANSHIP OF ADDRESSES & PHONE NUMBERS

ADDRESS TYPES: The specific field of data governed by this ownership is the address. Code Description Comment Owner(s)/Update Update Only

00 LOCAL Local mailing address for students.

Mailing address for

Undergrad Admissions Grad Office

Office of Student Financial Services

Registrar’s Office

Undergrad Admissions Grad Office

Academic Affairs Payroll

UHR

Student Employment Self Service SAIL

Academic Affairs Payroll

01 PRIMARY AT APPLICANT

students, alumni, constituents and organizations

Office of Student Financial Services

Registrar’s Office

University Advancement

UHR

Student Employment Self Service SAIL

TRACKING Applicant phone number Undergrad Admissions

B2 Secondary BU-Univ Adv use only

Secondary business

address University Advancement

BI BILLING ADDRESS No longer in use Student Business Services Student Business Services

BU\* BUSINESS or WORK

DI DIPLOMA

Person’s business address (students, alumni and constituents)

Address provided on the Application for Degree – where the student expects to be six months after graduation

University Advancement Registrar’s Office

| FOREIGN  | For INS reporting only. Non-Immigrant Foreign Address  | International Student and Scholars Office  |
| --- | --- | --- |

FO

SEE PAGE 28 FOR FOREIGN ADDRESS RULES

 Oakland University Revised Date: TBD Data Entry Standards Manual 22 of 55

Code Description Comment Owner(s)/Update Update Only GR GRANTING

AGENCY Address for grant contracts Grants Office

Undergrad Admissions

HR HUMAN

RESOURCES

Address to which the employee W-2’s are mailed (appears on the pay check stub)

Payroll

Student Employment Academic Affairs UHR

Grad Office

Office of Student Financial Services

Registrar’s Office

University Advancement Self Service SAIL

LB LIBRARY Library address MA MAILING NOT USED (but system required)

OA CAMPUS ADDITIONAL

Employee’s second office address

Employee & Employee’s Hiring Department

Self Service SAIL

OF CAMPUS OFFICE Employee’s primary office Employee & Employee’s Hiring Department

PA PARENTS NOT USED (but system

required)

PO PURCHASE ORDER Vendor address to which

purchase orders are mailed Purchasing

PT PAY TO Address to which Accounts

Payable checks are mailed Accounts Payable

SE SEASONAL Address for seasonal

residence University Advancement

Self Service SAIL

UH UNIVERSITY HOUSING

On campus housing

address University Housing

SEE PAGE 38 FOR UNIVERSITY HOUSING ADDRESS RULES

| RESERVED FOR TGRFEED USE ONLY  | Address type inserted on invoice when no active address (00,01,HR,UH) exists | NA  |
| --- | --- | --- |

XX NA \*Corporations or organizations should not have a BU address

 Oakland University Revised Date: TBD Data Entry Standards Manual 23 of 55

Data Entry Standards Manual for Banner Users

TELEPHONE TYPES: This specific field of data governed by this ownership is the telephone. Code Description Comment Owner(s)/Update Update Only

00 LOCAL Local phone number for students Permanent home phone number for

Undergrad Admissions

Grad Office

Office of Student Financial Services Registrar’s Office

Undergrad Admissions

Grad Office

Payroll

Student Employment Academic Affairs UHR

Self Service SAIL Payroll

Student Employment

01 PRIMARY AT APPLICANT

students, alumni, constituents and organizations

Office of Student Financial Services Registrar’s Office

University Advancement

Academic Affairs UHR

Self Service SAIL Payroll

Student Employment

TRACKING Applicant phone number Undergrad Admissions

Academic Affairs UHR

BI BILLING If different than UH, 00, 01, HR Student Accounts NO LONGER IN USE Secondary

B2

BU-Univ Adv use only

Secondary business phone number University Advancement

BU BUSINESS Individual’s work number or vendor’s primary phone number

CL CELLULAR Individual’s cellular phone number

Registrar’s Office

University Advancement

Accounts Payable

Undergrad Admissions

Grad Office

Office of Student Financial Services Registrar’s Office

University Advancement

Purchasing

Self Service SAIL

Payroll

Student Employment Academic Affairs UHR

Self Service SAIL

| FA  | FAX  | Facsimile number  | Undergrad Admissions Grad Office Office of Student Financial Services Registrar’s Office University Advancement | Payroll Student Employment Academic Affairs UHR Purchasing Accounts Payable |
| --- | --- | --- | --- | --- |

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 24 of 55

Data Entry Standards Manual for Banner Users

Code Description Comment Owner(s) Update FAX Vendor PO

Remittance Fax Vendor PO/Remittance number Purchasing Purchasing Registrar’s Office

FO FOREIGN Non – United States phone number

HR HUMAN

RESOURCES Employee’s phone number

MA MAILING NOT USED (but system required) OA CAMPUS

International Students and Scholars Office

Payroll

Student Employment

Academic Affairs

UHR

Undergrad Admissions

Grad Office

Office of Student Financial Services Registrar’s Office

University Advancement

Self Service SAIL

ADDITIONAL New See Page 26 Self Service SAIL OF CAMPUS OFFICE New See Page 26 Self Service SAIL Payroll

OT ACT Address ACT Other UG Admissions Undergrad Admissions Undergrad Admissions

Student Employment Academic Affairs

UHR

Undergrad Admissions

PA PARENTS Collected by UG Admissions and University Advancement

PG PAGER Individual’s pager number

University Advancement

Office of Student Financial Services Registrar’s Office

Undergrad Admissions

Grad Office

Office of Student Financial Services Registrar’s Office

University Advancement

University Advancement

Office of Student Financial Services Registrar’s Office

Self Service SAIL

Payroll

Student Employment

Academic Affairs

UHR

PT PAY TO Accounts Payable check address Accounts Payable Accounts Payable SE SEASONAL Phone number for second

(seasonal) residence University Advancement University Advancement University

UE

Advancement ONLY/EMERG CONTACT

Reserved for University

Advancement University Advancement University Advancement

| UH  | UNIVERSITY HOUSING  | University housing address on campus. (Note: Phone numbers are no longer active for campus  | University Housing  | University Housing  |
| --- | --- | --- | --- | --- |

 Oakland University Revised Date: 12/16/2020

Data Entry Standards Manual 25 of 55

Data Entry Standards Manual for Banner Users

|  |  | residence halls and apartments, but may have been reused across campus.)  |  |  |
| --- | --- | --- | --- | --- |

 Oakland University Revised Date: 12/16/2020

Data Entry Standards Manual 26 of 55

INSERTING AND/OR INACTIVATING PHONE NUMBERS

INSERTING A NEW TELEPHONE NUMBER

To insert a new area code and telephone:

1. Direct access SPATELE or the Telephone tab on the appropriate %AIDEN form. 2. Insert a new record.

3. Choose the appropriate telephone type.

4. Enter the area code and telephone number.

5. Put a check mark in the box labeled “PRIMARY.” There can ONLY be ONE “PRIMARY” number for each Type and Sequence number.)

6. Save.

INACTIVATING AN OLD TELEPHONE NUMBER

To inactivate an old, inactive phone number:

1. Direct access SPATELE or the Telephone tab on the appropriate %AIDEN form. 2. Find the record to be inactivated

3. Put a check mark in the box labeled “INACTIVATE.”

4. Save.

ADDRESS STANDARDS

The following forms are used to enter and change address information. The form used depends on the Banner module in use.

Form Module

SPAIDEN Student

PPAIDEN Human Resources

FTMVEND Finance (vendors)

FOAIDEN Finance

APAIDEN Advancement/Alumni

 When the correct person/non-person is identified, select the address button to access the address screen.

 Addresses should be entered starting with address line 1 following postal regulations.

USPS Address Standards Publication 28 provides detailed explanations on the postal regulations for each part of an address. The Publication can be found at: http://pe.usps.gov/cpim/ftp/pubs/pub28/pub28.pdf

Excerpts from Publication 28:

Standardized Delivery Address

 Oakland University Revised Date: TBD Data Entry Standards Manual 27 of 55

Data Entry Standards Manual for Banner Users

The Delivery Address Line and the Last Line of addresses output to the mail piece should be complete, standardized, and validated with the ZIP+4

file and City State file, respectively. It is recommended that delivery address information be stored in a minimum of 30 bytes or spaces in your computer system. The optimum recommendation is 64 bytes or spaces to be compatible with the Postal Service National ZIP+4 database.

The Postal Service defines a complete address as one that has all the address elements necessary to allow an exact match with the current Postal Service ZIP+4 and City State files to obtain the finest level of ZIP+4 and delivery point codes for the delivery address. A complete address may be required on mail at some automation rates. See the DMM for more detailed information.

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 28 of 55

A standardized address is one that is fully spelled out, abbreviated by using the Postal Service standard abbreviations (shown in this publication) or as shown in the current Postal Service ZIP+4 file.

Format

Format all lines of the address with a uniform left margin. Uppercase letters are preferred on all lines of the address block by the USPS. Mixed case is the current Oakland University standard. Per the USPS, lowercase letters in various type styles are acceptable provided they meet postal guidelines for OCR readability. Chapter 4 of Publication 25 provides complete guidelines for OCR readability that should be met when preparing a standardized mail piece. See the DMM for OCR readability requirements that must be met for automation rates (other rates may also apply).

Recipient Line Delivery Address Line Last Line:





 Oakland University Revised Date: TBD Data Entry Standards Manual 29 of 55

Data Entry Standards Manual for Banner Users

Secondary Address Unit Designators

Secondary address unit designators, such as APARTMENT or SUITE, are preferred to be printed on the mail piece for address locations containing secondary unit designators. The preferred location is at the end of the Delivery Address Line. The pound sign (#) should not be used as a secondary unit designator if the correct designation, such as APT or STE, is known or is shown in the ZIP+4 file.



Common Designators

The most common unit designators are:



Pound Sign (#)

If the pound sign (#) is used, there must be a space between the pound sign and the secondary number.



 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 30 of 55

Data Entry Standards Manual for Banner Users

Alternate Location

If all Delivery Address Line information cannot be continued in the Delivery Address Line above the city, state, and ZIP Code, place secondary address information on the line immediately above the Delivery Address Line.



Attention Line

The Attention Line is placed above the Recipient Line, that is, above the name of the firm to which the mail piece is directed.



Dual Addresses

Eliminate dual addresses on the output mail piece, if possible, although mailer files may maintain both mailing and physical addresses. However, if dual addresses are used, place the intended delivery address on the line immediately above the city, state, and ZIP+4 Code. This normally is the Post Office Box address. The other address must be placed on a separate line above the Delivery Address Line. The ZIP+4 Code used must be the correct code for the delivery address on the line directly above the city, state, and ZIP Code.



 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 31 of 55

Data Entry Standards Manual for Banner Users

City Names

It is strongly recommended that addresses use only approved Last Line (city) names as described in the Postal Service City State file currently in effect.

City names with the City State Mailing Name indicator flag set to YES in the City State file are considered part of a complete and standardized address;

city names with the flag set to NO in the City State file should not be used in a complete and standardized address.

Punctuation

With the exception of the hyphen in the ZIP+4 Code, punctuation may be omitted in the delivery address block.



Spelling of City Names

Spell city names in their entirety. When abbreviations must be used due to labeling constraints, use only the approved 13-character abbreviations provided in the City State file.

Note: Normally, the abbreviations follow the logic of using existing abbreviations, such as for suffix or directional words.



 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 32 of 55

Data Entry Standards Manual for Banner Users

Format

Format the Last Line with at least one space between the city name, two-character state abbreviation, and ZIP+4 Code.



Note: Two spaces are preferred between the state abbreviation and ZIP+4 Code.

Military Addresses

Overseas Locations

Overseas military addresses must contain the APO or FPO designation along with a two-character “state” abbreviation of AE, AP, or AA and the ZIP Code or ZIP+4 Code.



AE is used for armed forces in Europe, the Middle East, Africa, and Canada; AP is for the Pacific; and AA is the Americas excluding Canada.

Domestic Locations

Use only the approved city name as listed in the City State file, along with the two character state abbreviation and the ZIP Code or ZIP+4 Code.



 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 33 of 55

Data Entry Standards Manual for Banner Users

Street Name

Information found in the primary name field of the ZIP+4 file is used as the street name. The ZIP+4 file indicates the preferred primary street name to

ensure that the correctly designated primary street record is matched during the address standardization processes.

Punctuation is normally limited to periods, slashes, and hyphens:

 Periods: 39.2 RD

 Slashes (fractional addresses): 101 1/2 MAIN ST

 Hyphens (hyphenated addresses): 289-01 MONTGOMERY AVE 

Note: Hyphens in the address range are significant and are not removed. Hyphens in the street or city name, however, normally are not significant and may be replaced with a space.

Directionals

This is a term the Postal Service uses to refer to the part of the address that gives directional information for delivery (i.e., N, S, E, W, NE, NW, SE, SW).

Abbreviations

Abbreviate directionals (if they are one of the eight standard directional listed in AIS files) to the appropriate one- or two-character abbreviation.



 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 34 of 55

Data Entry Standards Manual for Banner Users

Single Directionals

Predirectional Field

When parsing the address from right to left, if a directional word is found as the first word in the street name and there is no other directional to the left of it, abbreviate it and locate it in the predirectional field of the ZIP+4 file for standardization purposes.



Postdirectional Field

When parsing from right to left, if a directional word is located to the right of the street name and suffix, abbreviate it and locate it in the postdirectional field.



Two Directionals

When two directional words appear consecutively as one or two words, before the street name or following the street name or suffix, then the two words become either the pre or the postdirectionals. Exceptions are any combinations of NORTH-SOUTH or EAST WEST as consecutive words. In these cases the second directional becomes part of the primary name and is spelled out completely in the primary name field.



The other exception is when the local address information unit has determined that one of the directional letters is used as an alphabet indicator and not as a directional.

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 35 of 55

Data Entry Standards Manual for Banner Users

Directional as Part of Street Name

When parsing from right to left, if the directional word appears between the street name and the suffix, then it appears as part of the primary name spelled out in the ZIP+4 file and is spelled out on the mail piece.



Note: In this example, the two-word directional is the primary street name. 

Suffixes

Abbreviations

The suffix of the address should conform with the standard suffix abbreviations listed in the ZIP+4 file (see Appendix C of Publication 28).

Two Suffixes

If an address has two consecutive words that appear on the suffix table (Appendix C), abbreviate the second of the two words according to the suffix table and place it in the suffix field. The first of the two words is part of the primary name. Spell it out on the mail piece in its entirety after the street name.



 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 36 of 55

Data Entry Standards Manual for Banner Users

Numeric Street Names

Numeric street names, for example, 7TH ST or SEVENTH ST, should be output on the mail piece exactly as they appear in the ZIP+4 file. Spell out numeric street names only when there are duplicate street names within a postal delivery area and the only distinguishing factor is that the one you matched is spelled out.

Post Office Box Addresses

Format

Post Office Box addresses are output as PO BOX NN on the mail piece. 

Leading Zero

Post Office Box numbers that are preceded by significant leading zeroes are identified in the ZIP+4 file by a hyphen (-) preceding the box number. Convert the hyphen into a zero on the output mail piece.



Designations

PO Box addresses often appear with the word CALLER, FIRM CALLER, BIN, LOCKBOX, or DRAWER. Change these to PO BOX as output on a mail piece.



 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 37 of 55

Data Entry Standards Manual for Banner Users



 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 38 of 55

Data Entry Standards Manual for Banner Users

USPS states an address is not valid and the individual claims it is a good address.

Send the mail piece or a copy of the mail piece to the Manager of Mail Services. Once the mail piece or copy is received Mail Services will run the address through CASS and NCOA to see if these systems produce the same result. It is important that Mail Services sees the actual mail piece or a copy so they see what remarks the USPS placed on the mail piece. If the result is the same, the individual will be notified that they will need to contact their local USPS or carrier. There is nothing the university can do to resolve the issue since we do not submit Change of Address (COA) information.

Oakland University Address Standard

Name: Individual, Company Name, Attention line or Department (if applicable) Address1: PO Box or Street Address Suite or Apt (if applicable) City, St Zip: City, State Zip

If the street address does not fit on one line, use the second address line.  Apartment or suite must go on the first address line

 PO Box or street address must go on the second address line:

Name: Individual, Company Name, Attention line or Department (if applicable) Address1: Suite or Apt (if applicable)

Address2: PO Box or Street Address

City, St Zip: City, State Zip

These are the data-entry standards for all addresses. Clean Address will format the address to USPS Standards if address and apartment or suite can fit on one line.

Good Employee Address:

Name: Joe Smith

Address1: Accounts Payable Department

Address2: Vandenberg Hall Rm 121B

Address3: 502 Meadow Brook Rd

City, St Zip: Rochester, MI 48309-4452

Good Independent Contractor Address:

Name: Joe Smith

Address1: Crittenton Hospital

Address2: Ste 100

Address3: 123 Any Street

City, St Zip: Rochester, MI 48309

Good Company Address:

Name: General Motors Corporation

Address1: Attn: Roger Smith

Address2: Ste 100

Address3: 123 Any Street

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 39 of 55

Data Entry Standards Manual for Banner Users

City, St Zip: Rochester, MI 48309

Note: For PT addresses being used as the 1099 address default, only two street lines can be populated. Address must be modified to fit two street lines.

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 40 of 55

Data Entry Standards Manual for Banner Users

FOR TYPES OF AND OA:

Employee:

 Street Line 1: Home Organization

 Street Line 2: Full Building Name and Room Number

 Street Line 3: Building Street Address

(Refer to the Office Addresses and Office Additional for Employees section for a more detailed explanation.)

FOR TYPES FO

To be updated by the International Students and Scholars Office only. STREET ADDRESS

 Street address lines are 75 characters in length.

 Do NOT use periods or the pound (#) sign.

 Hyphens may be used when needed.

The most common unit designators and postal-standard abbreviations are:

Abbreviation Unit Abbreviation Unit

Apt Apartment Ln Lane

Ave Avenue PO Box PO Box

Bldg Building Rd Road

Blvd Boulevard Rm Room

Cir Circle Rte Route

Ct Court Sq Square

Dept Department St Street

Dr Drive Ste Suite

Fl Floor Trl Trail

 All street suffix designators should be entered using U.S. Postal Standard street suffix abbreviations.

You can visit the USPS Standards Publication 28 website for additional abbreviations not listed above:

http://pe.usps.gov/text/pub28/pub28apc\_002.htm

Acceptable Geographic Directional abbreviations are as follows:

North N Northeast NE

East E Southeast SE

South S Northwest NW

West W Southwest SW

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 41 of 55

Data Entry Standards Manual for Banner Users

CITY

 Tab through the City field to the Zip Code field. If you enter the 5-digit Zip Code and then tab, the City field will populate.

 The Zip Code/City validation table in Banner is updated quarterly but it is necessary to verify the city with the individual to be sure the information is correct.

 Most cities will default into the field when the 5-digit Zip Code is entered and the TAB key is depressed. If entering city data, use uppercase and lowercase letters (refer to U.S. Postal Standards for appropriate abbreviations.)

 Maximum field length is 20 characters.

 Do NOT use periods in the city field.

STATE/PROV.

 Tab through the State/Prov field to the Zip Code field. If you enter the 5-digit Zip Code and then tab, the state field will populate.

 Use States or Canadian Provinces only.

COUNTY CODE

 This code will populate when the Zip Code is entered.

ZIP CODE

 Enter a 5 digit Zip Code (the table used may not have the full nine-digit Zip Code) and then tab to populate the City, State/Prov, County and Nation fields.  Review the populated data and adjust city name if necessary, i.e. Auburn Hills to Lake Angelus (same Zip Code) or five-digit Zip Code to nine-digit Zip Code.  Zip Codes must be entered for all U.S. addresses.

 For U.S. Zip Codes, enter a hyphen when the entire nine-digit Zip Code is available. If the last four digits are unavailable, enter the first five digits.

o Example: 49225

 49225-4987

NATION

 This code will populate when the Zip Code is entered

 US will automatically populate the Nation field when a Zip Code is entered for US addresses.

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 42 of 55

Data Entry Standards Manual for Banner Users

INTERNATIONAL ADDRESSES

Taken from the USPS Address Standards Publication 28.



 The city should be entered into the city field.

 The international Postal Code should be entered in the Zip Code field.

 The Nation Code should only be entered for international addresses in the Nation field. Nation Codes should NOT be entered in the city field or the state field. The nation code defaults to U.S. if the Zip Code is a United States Zip Code.

 These standards are for international MAILING addresses ONLY. They are not to be used for the Foreign (FO) address type. Refer any changes of FO address types to the International Students and Scholars Office (ISSO) at isso@oakland.edu or (248) 370-3358. The FO address type is not designed to be used as a mailing address.

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 43 of 55

Data Entry Standards Manual for Banner Users

Examples:

If an International Address appears as below:

Charles Smith

4 Hansen Rd S

Brampton Ontario L6W 3H6

CANADA

Enter it into Banner like the examples below:

Henry LaFleur

French Impressions 13 Rue Duzes

75200 Paris

FRANCE

Name: Charles Smith Address Line 1: 4 Hansen Rd S Address Line 2: blank

Address Line 3: blank

City: Brampton Ontario State: blank

Zip: L6W 3H6 Nation: CANADA

Name: Henry LaFleur Address Line 1: 13 Rue Duzes Address Line 2: French Impressions Address Line 3: blank

City: 75200 Paris State: blank

Zip: blank

Nation: FRANCE

SEVIS rules require that the International Students Office report addresses for international students (00, 01, HR, FO). Also, international students are required to keep the International Students Office informed of any change of address. YOU MAY CHANGE the (00), (01), AND (HR) address types for these students. DO NOT CHANGE the FO type. All FO address type changes must be made by the ISSO office. If you make changes to the 00, 01 and/or HR address type, refer any student with an FO address type to the International Student and Scholars Office (ISSO) to be sure their current information is on file.

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 44 of 55

Data Entry Standards Manual for Banner Users

UNIVERSITY HOUSING (UH) ADDRESSES

 DO NOT CHANGE A UNIVERSITY HOUSING (UH) ADDRESS (COTTAGES, RESIDENCE HALLS, OR APARTMENTS). NEVER change these addresses, even if the student says they have already moved out. Students should contact University Housing if they are concerned about their housing address.

 Local addresses 00 may contain university housing addresses residence hall and apartment names (i.e. Hill House, George T. Matthews, Ann V. Nicholson Apartments or the Cottages). Students are able to add a university housing address using Self Service SAIL and there is no way to prevent this.

 +4 Zip Codes are assigned to University Housing buildings.

University Housing & Plus 4 Zip Code Table

Hall Name PLUS 4 CODE

Fitzgerald House 4482

Hamlin Hall 4452

Hill House 4452

Hillcrest Hall 4478

Oak View Hall 4452

Vandenberg Hall 4452

| Van Wagoner Hall  | 4452 |
| --- | --- |

Apartment Name PLUS 4 CODE

1000 Ann V. Nicholson 4425

2000 Ann V. Nicholson 4426

3000 Ann V. Nicholson 4427

4000 Ann V. Nicholson 4455

5000 Ann V. Nicholson 4428

6000 Ann V. Nicholson 4429

7000 Ann V. Nicholson 4430

George T. Matthews (on Meadow Brook Rd) George T. Matthews (on Ravine Dr)

4452 4487

| Cottages  | 1905 |
| --- | --- |

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 45 of 55

Data Entry Standards Manual for Banner Users

UPDATING STUDENT, ALUMNI OR CONSTITUENT ADDRESSES USING SPAIDEN, APAIDEN, FOAIDEN OR PPAIDEN

 Old addresses should be inactivated and end dated. Do not update the Source. The new address should be entered as an active address with the same address type as the old address.

 If the inactive box is checked, the address will not be selected for Banner reports.  If the “To Date” field is populated with a future date, but the inactive box is not checked, the address will be selected for Banner reports.

 If the “To Date” field is populated with a date that has already passed, but the inactive box is not checked, the address will not be selected for Banner reports. (Note that the inactive box should always be checked as part of inactivating an address).

 The source of an address change should be provided in the “Source” field. Refer to the address source validation table (STVASRC) for available selections below.

Code Description Code Description ACT ACT Scores HTRN High School Transcript AP AP Exam Scores INV Vendor Invoice APP Application for Admission ISIS Converted from ISIS AUDT Data Audit ISS International Student Services

BC04 BCI 2004 Lost Alum Search

BC05 BCI 2005 Lost Alum Search

KI07 Kintera 2007 Lost Alum Search

LOAN Direct Loan Origination Record

CALL Phone call from individual MAIL Mail, e-mail or fax

CASD USPS Change of Address Service

CLVC Cons Loan Verification Cert

ML02 Marts & Lundy 2002 MPT Math Placement Test

COLL Collection Agency NCOA National Change of Address Upd

CONT Undergraduate Contact Card

ONGM Online Gift / Membership

CORP Corporate Sponsor POST Post Office change CVT Campus Visit RE Raiser’s Edge Conversion DOE NSLDS Database RETD Returned Mail DRCT Direct Contract RSCH University Advancement Research

EDI Electronic Data Interchange

SAT SAT Exam Scores

EXTR Exeter Interface SELF In person report

| GIFT  | Gift to OU  | TEL  | Update Thru Telefund |
| --- | --- | --- | --- |

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 46 of 55

Data Entry Standards Manual for Banner Users

GMAT GMAT Tapeload TOEF Toefl Scores GRAD Application for Degree TREQ Transcript Request GRE GRE Dataload TTRN Transfer Transcript GRHB Graduate Hobson UAS Perkin’s Billing Service GRZL GrizzLink Member Update WAPP Web Admissions Application

HCD Harris Connect Data WEB World Wide Web

| HRS  | Converted from HRS |  |  |
| --- | --- | --- | --- |

HOLD 04 FOR MISSING ADDRESSES

\*Only University Housing has the authority to change the University Housing (UH) addresses (cottages, residence halls, and apartments).

\*\*NOTE: When all Student addresses are inactive because mail sent to the address was returned by the post office and no new address is available, a Hold 04 Address Missing is placed on the student’s record on SOAHOLD. This will prevent the student from obtaining transcripts, graduating or receiving grades until a valid address has been provided.

IMPORTANT: Remember when you are adding a Hold 04 Address Missing to an account, DO NOT check the ‘Release Indicator’ box. If the release indicator box is checked the only user who may remove the hold is the user that added the hold.

Any Banner user receiving a phone call from a student regarding an address problem should be aware of the hold procedure and should check SOAHOLD for the 04 hold. If the hold is there, the user should update the address and remove the hold. If the user does not have access to release the hold, the user should contact Academic Records at (248) 370-4055 and request that the hold be removed.

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 47 of 55

Data Entry Standards Manual for Banner Users

CAMPUS OFFICE (OF) ADDRESS AND OFFICE ADDITIONAL (OA) ADDRESS FOR EMPLOYEES

THE FOLLOWING STANDARDS APPLY TO BOTH OF AND OA ADDRESS TYPES:

 Addresses may be entered through any of the %AIDEN forms or through SAIL using the View/Update Address(es) and Phone(s) link in the Personal Information tab.  Street addresses lines are 75 characters in length.

 Do NOT use periods or the (#) pound sign.

 Only use hyphens if needed for off campus addresses.

 History will not be maintained on OA or OF addresses. Therefore, you may clear each field and type in the new data or type over the existing data.

 If no OA or OF address exists, create new record.

 Always use OF for the employee’s primary address and telephone number.  OA addresses and telephone numbers are used for secondary offices such as a laboratory or main office address. The majority of campus employees will not have OA addressees or phone numbers.

 For additional information, visit the Oakland University Web Directory website.

Example of a Campus Office (OF) address:



 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 48 of 55

Data Entry Standards Manual for Banner Users

STREET ADDRESS

 Line 1 is designated as the Department Name (Home Organization). To verify the Department Name (Home Org), check the employees PEAEMPL record in Banner. The Department Name (Home Org) must be entered exactly as it appears in PEAEMPL. (See example of PEAEMPL below.)



 Examples of Home Organizations are:

 Academic Affairs

 Information Technology

 Advancement Services

 Even if the person works at an extension site, use the Home

Organization name in Line 1.

 Insert the Building name and room number for on campus employee on Line 2. Do not use punctuation.

 For those employees housed at off campus locations (i.e., Macomb University Center, Birmingham Seaholm High School) enter the site name on Line 2:

 Macomb University Center

 Seaholm High School

 For on campus employees, enter the building street address in Line 3. Do not use punctuation.

 For off campus employees, enter the full street name and room number on Line 3, in that order. Do not use punctuation.

CITY

 For on campus employees, enter “Rochester”.

 For off campus employees, enter the city of the extension center.

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 49 of 55

Data Entry Standards Manual for Banner Users

STATE/PROV

 Enter “MI”

COUNTY CODE

 Do not enter a county code.

ZIP CODE

 Enter the + 4 ZIP code assigned to your building for campus employees. The + 4 ZIP codes can be found on the OUPD website at:

https://oupolice.com/addresses/lookup/

 For off campus employees, enter the Zip Code of the extension center NATION

 Do not enter a nation code.

PHONE NUMBER

 Enter area code of 248 for all on campus numbers. For those employees housed at off campus sites (i.e., Macomb University Center, Seaholm High School) enter the actual area code.

 In the second field, enter the full seven digit phone number beginning with 370 for all main campus numbers. East campus (JDH, MBH, Golf, etc.) may have a different phone number prefix, i.e. 364. No hyphens are required. (example: 3704111) Enter the actual phone number for off campus employees.

 The extension field is reserved for only those areas that have actual extensions (i.e., off campus locations). Enter the extension, but do not use an “X”, “ext” or other character to imply extension. Do not use this field for a secondary office number.

FROM DATE

 Date will default when record is saved.

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 50 of 55

Data Entry Standards Manual for Banner Users

SOURCE

 Enter applicable source code from list below or refer to the STVASRC – Address Source Code Validation table for other options.

Code Description

AUDT Data Audit

CALL Phone call from employee

MAIL Mail, fax or e-mail notification

from employee

| SELF  | In person report from employee |
| --- | --- |

SAVE RECORD

 Save record after data entry is complete.

E-MAIL ADDRESSES

 For University e-mail policy see Policy 420, Employee Broadcast E-mail Procedure.

 Under no circumstances should the OAKU e-mail address be altered (changed or deleted). University Technology Services has locked down the OAKU e-mail address from being updated by most users.

 If the OAKU address in GOAEMAL is incorrect, a ticket should be submitted by e-mailing uts@oakland.edu.

 Two main e-mail types exist:

o OAKU – The Oakland University e-mail address assigned by the Office of Information Technology.

o OTHR – A non-Oakland University e-mail address. Multiple OTHR e-mail addresses may exist. Available for user to update via SAIL.

 Other e-mail types:

o EBIL – Billing and collections e-mail (SBS only)

o PT## – Accounts payable e-mail (Accounts Payable only)

o PRNT – Parent e-mail. Available for user to update via SAIL.

o PRN2 – Parent e-mail 2. Available for user to update via SAIL.  In GOAEMAL, locate the person through the search option.

 Once the person is found, click on next block to move into the body of the form.  If the existing e-mail address is no longer active, mark the old e-mail address “inactive” by putting a check-mark in the “inactive” box.

 DO NOT DELETE AN “INACTIVE” E-MAIL ADDRESS. SIMPLY CHECK “INACTIVE”. This will preserve the history and prevent e-mail search vendors from supplying OU with the same inactive or incorrect e-mail address.

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 51 of 55

Data Entry Standards Manual for Banner Users

 To add an OTHR e-mail type, place the cursor on a blank “E-mail Type” field. If no blank record exists, click on Insert on the toolbar. Multiple OTHR e-mail addresses can exist on the account.

o Type OTHR in the E-mail Type field then tab.

o Type the non-OU e-mail address in the E-mail Address field.

o Save the record.

PREFERRED INDICATOR

 All OAKU e-mail addresses that are “active” must be the preferred e-mail address. If no OAKU e-mail address exists, another e-mail address can be the preferred address.

 If an OAKU e-mail address does not exist, a person may identify another e-mail address as their preferred address by clicking the Preferred e-mail box.  If a previous non-OAKU e-mail address is marked Preferred and you have not specifically been informed by the record holder that the new e-mail is Preferred, do not change the Preferred indicator.

 If an e-mail address is currently identified as the preferred address, but is incorrect, inactivate the e-mail and uncheck the Preferred indicator box.  When updating Preferred indicators, you will need to un-check that address as preferred and save the record before you can mark the new address as preferred. Only one e-mail address can be marked as preferred.

 If there is only one e-mail address on the record, mark it preferred.  If an additional e-mail address is being added to the record and there is not one marked as preferred, mark the newest e-mail as preferred.

Note: Changes to the Preferred indicator box for other (OTHR) e-mail addresses may be made. No more than one (1) e-mail address may be identified as Preferred.

ADDRESS DATA AND REPORT WRITING

When individuals are querying address data from Banner in Access they need to be sure they are looking at both the "To Date" field and the "Inactive Address" box of the address to be sure they are not pulling inactive addresses. There is a script (job SZRSRDR) that is run nightly that looks at these two fields and updates them accordingly. If the "To Date" field is populated with a date that is less than today's date and the “Inactive Address” box is not checked, the script will put a check in the "Inactive Address" box. Alternately, if the “Inactive Address” box is checked and the “To Date” field is blank, the script will put yesterday’s date in the “To Data” field.

When individuals are querying address data from Banner in Access they need to be sure they are paying attention to the ‘Deceased’ indicator on the record (in SPBPERS table or various views). The ‘Deceased’ indicator must be ‘null’ (blank) so that mailings are not sent to an individual who is deceased.

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 52 of 55

Data Entry Standards Manual for Banner Users

When individuals are querying address data from Banner in Access they need to be sure they are paying attention to the ‘Confidentiality’ indicator on the record. The ‘Confidentiality’ indicator must be ‘null’ (blank) so that mailings are not sent to an individual who has marked their record as ‘confidential’, unless the mailing is directly related to the person's academic program.

Individuals are encouraged to use the BAN\_STUDENT\_LABELS\_LISTS View to query address data.

The Shared Data Address Sub-committee created two databases to assist departments in finding updated addresses. One database reports address updates by students and the other database reports updates by employees. The databases are located on the Shared Data Committee shared drive at:

\\shares\SharedDataCommittee\Shared Data Committee Address Change Audit Databases.

CLEAN ADDRESS SOFTWARE

Clean Address Process in Banner:

The Clean Address software in Banner verifies the validity of an address and helps ensure that addresses meet current USPS Standards. Clean Address:  Checks the validity of a given address in relation to the ZIP Code.  Checks the validity of an address by comparing the street number to known ranges for a given street within a ZIP Code.

 Standardizes the addresses entered by abbreviating street names in accordance with USPS Standards.

 Formats the entire address in accordance with postal standards, such as placing the apartment or suite on the same line as the street address or on the line above the street address.

 Does not verify that a recipient still lives at the address. This is done with CAS certification.

Clean Address monitors addresses entered into Banner through INB and through self service SAIL:

 Address types reviewed: 00 Local, 01 Primary, BU Business, HR Human Resources, MA Mailing, OA Office Alternate, OF Office Address, PO Purchase Order, PT Pay To Address, SE Seasonal

 For formatting, punctuation and abbreviations, Clean Address will update the entered address without notifying the user. Items that are standardized include: Street Address, Zip Code, and County. When these changes occur, the users should accept them as the changes conform with Postal Standards.

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 53 of 55

Data Entry Standards Manual for Banner Users

 For street number or street name, Clean Address will present the user with a pop-up message notifying the user that corrections are necessary. Examples of corrections are: an address does not fall within a valid range, does not have a valid street name or there are multiple matches. Users are given the opportunity to correct the address. In self-service SAIL, the user must enter a valid address, but in INB, users can override the pop-up, if the address is known to be correct. It is recommended that the user contact the individual for clarification.

Clean Address can also be run in batch mode to validate addresses that are loaded into Banner from external sources such as ACT test scores or CAS certification files. The batch process is run quarterly after the Clean Address database is updated with current USPS address tables. The batch process can be set to review all records or only review unverified records in the address table. Oakland’s practice is to only review unverified records during the batch process.

When Clean Address corrects an address, indicators are placed in the SPAIDEN routing and delivery fields on the address form.



There is also an entry to the “Reviewed User” field in the SPRADDR table, which can be queried using Access, SQL or using the form GOAADDR.



If the entry in the “Reviewed User” field has a code after the date, the address was not updated by Clean Address for the following reasons:

| CLEAN\_Address will return this field as output, when an address is NOT fully verified: contains a single letter, that represents the problem encountered: M Multiple Matches N No Data Available For City R Range Error T Component Error U Unknown Street X Undeliverable Address Z Invalid ZIP Code C Canadian ZIP Code D Demo Mode Only Empty: No Error |
| --- |

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 54 of 55

Data Entry Standards Manual for Banner Users

| Output field: contains a 2-character code for Delivery Point Validation Status. AA Passed DPV: BB Passed DPV RR Passed DPV A1 Not matches to ZIP+4 CC Suite/Apt Invalid M1 Street Number Missing M3 Street Number Invalid N1 Suite/Apt Missing P1 Missing PO, RR, or HC Box number P3 Postal or Rural Route Primary number invalid R1 Suite/Apt Missing |
| --- |

 Oakland University Revised Date: 12/16/2020 Data Entry Standards Manual 55 of 55