

Banner Student General Person Training Workbook

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Section A: Introduction

Lesson: Overview

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Workbook goal

The goal of this workbook is to provide you with the knowledge and practice to capture and maintain biographic/demographic data for persons at your institution. The workbook is divided into these sections:

- Introduction
- Set Up
- Day-to-Day Operations
- Support Services
- Reports Used in the General Person Module
- Reference

Note: Later in the training process, Tape Load processing will be detailed further.

Intended audience

The staff of the Admissions Office and Recruitment Office, as well as selected personnel who maintain biographic and demographic data for prospects

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Section A: Introduction

Lesson: Process Introduction

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Introduction

The staffs of the Admissions Office and Recruitment Office, as well as selected personnel who maintain biographic data for prospects will maintain supporting General Person information. Biographic, demographic, medical, contact information and General Person reports will be created and defined.



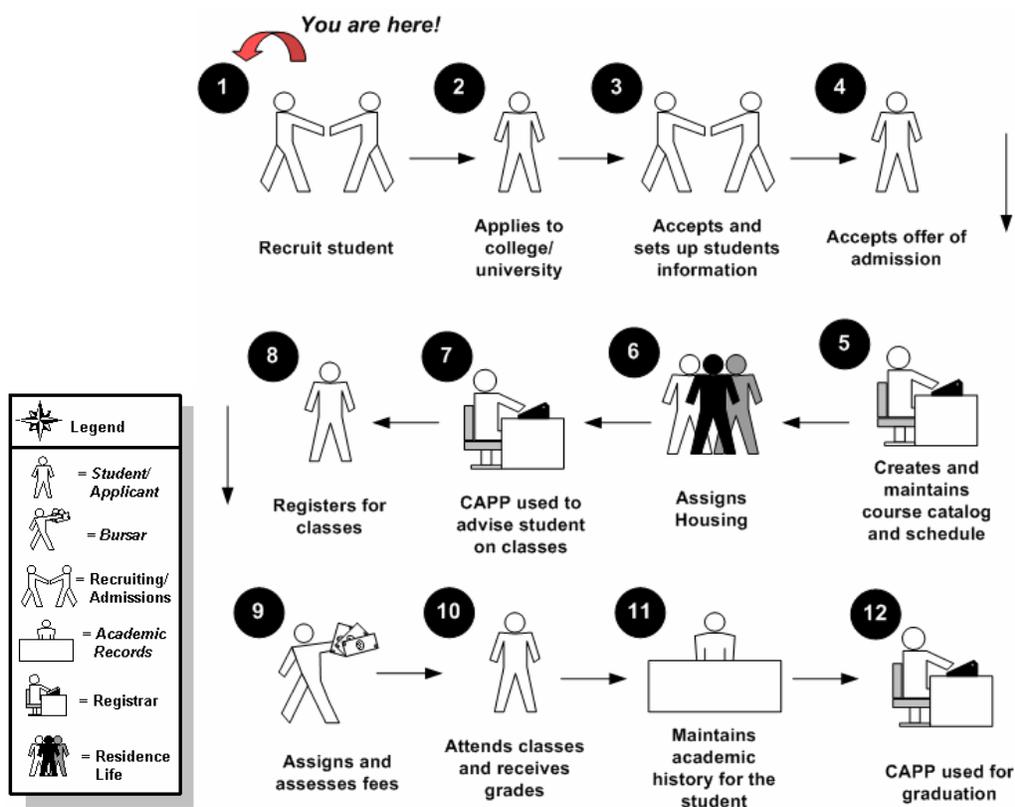
Section A: Introduction

Lesson: Process Introduction (Continued)

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Flow diagram

This diagram highlights the processes used to create and maintain biographic and demographic student data within the overall Student process.



Note: For the purpose of the workbook exercises, we are using the scenario that the person becomes a person in Banner when they apply to the institutions. There are instances when the person could already exist in Banner (i.e. if they are an employee, a recruit, via financial aid, etc.).

About the process

In the basic General Person process

- persons and non-persons are created and maintained
- supporting General Person information is created and maintained
- General Person reports are created.



Section A: Introduction

Lesson: Terminology

◀ [Jump to TOC](#)

Person

Individual identified to the Banner system with a name and identification number.

Non-person

Entity identified to the Banner system, such as a vendor doing business with the institution.



Section B: Set Up

Lesson: Overview

◀ [Jump to TOC](#)

Introduction

The purpose of this section is to outline the set-up process and detail the procedures to set up your Banner system.

Intended audience

The staff of the Admissions Office and Recruitment Office, as well as selected personnel who maintain biographic and demographic data for prospects

Objectives

At the end of this section, you will be able to create the rules and set parameters needed for creating and maintaining biographic and demographic student data.

Prerequisites

To complete this section, you should have

- completed the Education Practices computer-based training (CBT) tutorial “Banner 7 Fundamentals,” or have equivalent experience navigating in the Banner system
- completed the Student Overview training workbook
- administrative rights to create the rules and set the validation codes in Banner.



Section B: Set Up

Lesson: Overview (Continued)

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Section B: Set Up

Lesson: Validation Forms Used in the General Person Module

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Validation forms needed

The following validation forms are used frequently in the General Person module. Review and add values to the forms listed. Create the necessary codes needed to complete this module by using your initials.

Once you have practiced with these, you may select other rules tables from the module lists to review and plan the values you may want to add for your organization.

Some of these forms may be previously established through other modules. Review these forms to see how they relate to the General Person module.

Form Description	Banner Name
Recruiter Code Validation	STVRECR
Appointment Result Code Validation	STVRSLT
Comment Type Code Validation	STVCMTT
Originator Code Validation	STVORIG
Contact Type Code Validation	STVCTYP
Relation Code Validation	STVRELT
Medical Code Validation	STVMEDI
Disability Type Code Validation	STVDISA
Medical Equipment Code Validation	STVMDEQ
Disability Service Code Validation	STVSPSR
Name Type Validation	GTVNTYP
State/Province Code Validation	STVSTAT
Address Type Code Validation	STVATYP
Zip Postal Code Validation	GTVZIPC
County Code Validation	STVCNTY
Nation Code Validation	STVNATN
Telephone Type Validation	STVTELE
Address Source Validation	STVASRC
E-Mail Address Type Validation	GTVEMAL
EDI/ISO Standard Code Validation	GTVSCOD
Language Code Validation	STVLANG
Port of Entry Validation	STVPENT
Visa Type Code Validation	STVVVYP



Section B: Set Up

Lesson: Validation Forms Used in the General Person Module (Continued)

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Validation forms needed, continued

Form Description	Banner Name
International Student Sponsor Code Validation	STVSPON
Employment Validation	STVEMPT
Citizen Type Code Validation	STVCITZ
Ethnic Code Validation	STVETHN
Marital Status Code Validation	STVMRTL
Religion Code Validation	STVRELG
Legacy Code Validation	STVLGCY
IPEDS Ethnic Code Validation	STVETCT



Section B: Set Up

Lesson: Recruiter Code Validation (STVRECR)

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Introduction

Use the Recruiter Code Validation Form to create, update, insert, and delete recruiter codes (i.e., East Coast Recruiter, Central Recruiter, High School Recruiter, etc.). Several modules use this form to validate the recruiter codes. You can only create and update these codes from this form.

Banner form

Code	Description	System Req	Activity Date
000	Unassigned	<input checked="" type="checkbox"/>	24-JUN-1991
BB	Bryan Bowman	<input type="checkbox"/>	06-JAN-1995
CAM	Campus	<input type="checkbox"/>	06-JAN-1995
CEN	Central	<input type="checkbox"/>	06-JAN-1995
CJ	Cheryl James	<input type="checkbox"/>	06-JAN-1995
DM	Douglas Mason	<input type="checkbox"/>	06-JAN-1995
EAC	East Coast	<input type="checkbox"/>	06-JAN-1995
HIS	High School	<input type="checkbox"/>	06-JAN-1995
KM	Kamakshi Mallikarjun	<input type="checkbox"/>	02-AUG-2004
MAH	Margy Hockett	<input type="checkbox"/>	20-APR-2006
PJL	Pat's recruiter	<input type="checkbox"/>	03-MAR-2006
RL	Raymond Lawrence	<input type="checkbox"/>	06-JAN-1995
SH	Susan Hughes	<input type="checkbox"/>	06-JAN-1995
TC	Tony Carrithers	<input type="checkbox"/>	06-JAN-1995
WEC	West Coast	<input type="checkbox"/>	06-JAN-1995
WWZ	Bill Zimmer	<input type="checkbox"/>	13-APR-2004
		<input type="checkbox"/>	
		<input type="checkbox"/>	



Section B: Set Up

Lesson: Appointment Result Code Validation (STVRSLT)

◀ Jump to TOC

Introduction

Use the Appointment Result Code Validation Form (STVRSLT) to create, update, insert, and delete appointment result codes such as Attended Interview, Did Not Attend Interview, Late to Interview. The Prospect Information Form (SRARECR) and the Person Appointments/Contacts Form (SOAAPPT) use this form to validate the recruiting appointment result codes. You can only create and update these codes from this form.

Banner form

Code	Description	Generate Contact	Activity Date
ATTN	Attended	<input checked="" type="checkbox"/>	06-JAN-1995
KM	attended	<input type="checkbox"/>	02-AUG-2004
LATE	Late	<input type="checkbox"/>	06-JAN-1995
NOSH	Did Not Attend	<input type="checkbox"/>	06-JAN-1995
		<input type="checkbox"/>	
		<input type="checkbox"/>	



Section B: Set Up

Lesson: Comment Type Code Validation (STVCMTT)

◀ Jump to TOC

Introduction

Use the Comment Type Code Validation Form (STVCMTT) to create, update, insert, and delete comment types and their respective codes (i.e., General Comment, Special Needs, or Added via ACT Tape). This form is used by other forms to validate the comment types. You can only create or update the comment types from this form.

Banner form

Code	Description	Activity Date
100	General Comment	02-APR-1987
101	Added via ATP Tape	29-APR-1987
103	Added via ACT Tape	29-APR-1987
104	Special Needs	29-APR-1987
105	Intramurals	12-FEB-1988
106	Fraternity	29-APR-1987
107	Sorority	29-APR-1987
108	Debate Club	29-APR-1987
109	Athletic Scholarship	29-APR-1987
110	Added via Fin. Aid/CSS Tape	10-AUG-1987
111	Requested Campus Housing	10-AUG-1987
112	Assigned Campus Housing	09-OCT-1987
114	Internet Access	02-AUG-2004



Section B: Set Up

Lesson: Originator Code Validation (STVORIG)

◀ [Jump to TOC](#)

Introduction

You use this form to create, update, insert, and delete originator codes (i.e., Student Accounts Office, Bursar's Office, Dean of Students, etc.). Forms in several modules use this form to validate the originator codes. You can only create and update these codes from this form. The value *AUTO*, for Generated Automatically, is a system-required value on this form.

Note: Originator codes should indicate areas of an institution rather than the names of individuals employed by the institution.



Section B: Set Up

Lesson: Originator Code Validation (STVORIG) (Continued)

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Banner form

Originator Code Validation STVORIG 7.0

Code	Description	Activity Date
ACCT	Student Accounts Office	26-MAR-1987
ADMS	Admissions Office	26-MAR-1987
ALDR	Director of Alumni Relations	05-JUN-1990
ANFD	Annual Fund Office	03-JUN-1990
APIO	API Test Code	16-JUN-2004
AUTO	Generated Automatically	31-MAR-1988
BUSO	Bursar's Office	09-OCT-1987
CART	College of Arts and Sciences	09-DEC-2003
CCON	Capital Consultant	03-JUN-1990
CORG	Corporate Giving Office	03-JUN-1990
COUN	Counseling Center	01-MAY-1987
DEVD	Director of Development	05-JUN-1990
DOFI	Dean of Instruction	01-MAY-1987
DOFS	Dean of Students	01-MAY-1987
EDFL	Sch Ed Fellowship Office	09-DEC-2003
EDUC	School of Education	09-DEC-2003
FAID	Financial Aid Office	01-NOV-1989
FINO	Finance and Billing	03-MAR-1992
KM	Dept of Music	02-AUG-2004
LIBR	Library Circulation Area	12-MAR-1987
MAJG	Major Gifts Office	03-JUN-1990
MATH	Department of Mathematics	12-MAR-1987
PHY1	Physical Education - Football	12-MAR-1987



Section B: Set Up

Lesson: Contact Type Validation (STVCTYP)

◀ Jump to TOC

Introduction

Use the Contact Type Validation Form (STVCTYP) to create, update, insert, and delete recruiting contact type codes (i.e., Campus Visit, College Night, or Merit List Letter, etc.). Several forms in the Recruiting module and the Interface Validation Form (STVINFC) use this form to validate recruiting contact type codes. You may only create or update these codes from this form.

Banner form

Contact Type Code Validation STVCTYP 7.0

Code	Description	Activity Date
CMP	Campus Visit	05-JAN-1988
CNN	College Night	30-AUG-2004
CNS	Counselor Visit	25-MAR-1987
DLL	Dean's List Letter	29-APR-1987
FA1	CSS Profile FA Application	02-AUG-2004
FA2	EDE FA Application	02-AUG-2004
FIN	Financial Aid Tape	04-FEB-1995
FUL	Follow-up Letter	29-APR-1987
HLL	Honors List Letter	29-JAN-1991
IN1	Interview One	13-APR-1987
IN2	Interview Two	03-JAN-1995
INP	In-person	25-MAR-1987
KM	Email	02-AUG-2004
MH	Testing	15-FEB-2006
MIL	Military Interest Letter	03-JAN-1995
MLL	Merit List Letter	29-APR-1987
PGL	Univ Pres Greeting Letter	22-MAY-1987
PHN	Phone Call	25-MAR-1987
PR	PocketRecruiter Event	06-OCT-2004
TAP	Test Score Tape	09-OCT-1987
WEB	Web Contact	30-JUN-2004



Section B: Set Up

Lesson: Relation Code Validation (STVRELT)

◀ Jump to TOC

Introduction

Use the Relation Code Validation Form (STVRELT) to create, update, insert, and delete relation codes (i.e., Brother, Mother, Spouse, etc.). The Emergency Contact Form (SPAEMRG) and the Guardian Information Form (SOAFOLK) use this form to validate the relation codes. You can only create and update these codes from this form.

Banner form

Code	Description	SEVIS Equiv	Activity Date
A	An Ex-spouse		09-AUG-1991
B	Brother		31-MAR-1987
C	Child	02	22-JUN-2004
F	Father		31-MAR-1987
G	Grandparent		24-JUN-1991
M	Mother		31-MAR-1987
N	Neighbor		15-JUL-1993
O	Relative		24-JUN-1991
P	Spouse	01	09-AUG-1991
R	Friend		15-JUL-1993
S	Sister		31-MAR-1987
U	Guardian		01-MAY-1987
X	Significant Other		09-AUG-1991



Section B: Set Up

Lesson: Medical Code Validation (STVMEDI)

◀ Jump to TOC

Introduction

Use the Medical Code Validation Form (STVMEDI) to create, update, insert, and delete medical codes (i.e., Blind, Deaf, Prosthetic Limb, etc.). The Medical Information Form (GOAMEDI) uses this form to validate the medical codes. You can only create and update these codes from this form.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form

Code	Description	Activity Date
BL	Visually Impaired	19-SEP-1991
DE	Hearing Impaired	09-OCT-1990
DI	Diabetic Insulin User	07-JAN-1991
EP	Epileptic	01-MAY-1987
GN	Generic Medical identifier	26-JUL-1994
HC	Heart Condition	01-MAY-1987
MU	Mute	17-AUG-1987
PL	Prosthetic limb	09-OCT-1987
PP	Paraplegic	31-MAR-1987
QP	Quadriplegic	17-AUG-1987
QUADRIPLEG	Quadriplegic	24-APR-2006



Section B: Set Up

Lesson: Disability Type Code Validation (STVDISA)

◀ Jump to TOC

Introduction

Use the Disability Type Code Validation Form (STVDISA) to create, update, insert, and delete disability type codes (i.e., Blind, Multiple Sclerosis, Hearing Impaired, etc.). The Medical Information Form (GOAMEDI) uses this form to validate disability type codes. You may only create or update these codes from this form.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form

Code	Description	Activity Date
HI	Hearing Impaired	03-JAN-1995
MI	Mobility Impaired	18-MAY-1993
VI	Visually Impaired	26-JUL-1994



Section B: Set Up

Lesson: Medical Equipment Code Validation (STVMDEQ)

◀ Jump to TOC

Introduction

You use this form to create, update, insert, and delete medical equipment codes (i.e., Leg Braces, Seeing Eye Dog, Hearing Aid, etc.). The Medical Information Form (GOAMEDI) uses this form to validate the medical equipment codes. You can only create and update these codes from this form.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form

Code	Description	Activity Date
AMP	Amplified Telephone Handset	12-JUN-1991
BRA	Leg Braces	31-MAR-1987
BWR	Braille Writer	01-MAY-1987
CRU	Crutches/Walker	13-JUN-1994
DOG	Seeing Eye Dog	01-MAY-1987
HEA	Hearing Aid	01-MAY-1987
WHE	Wheelchair	31-MAR-1987



Section B: Set Up

Lesson: Disability Service Code Validation (STVSPSR)

◀ Jump to TOC

Introduction

Use the Disability Service Code Validation (STVSPSR) to create, update, insert, and delete disability service codes (i.e., County Paratransit Service, Hearing Aid Required, Disabled Student Services, etc.). The Medical Information Form (GOAMEDI) uses this form to validate the disability service codes. You can only create and update these codes from this form.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form

Code	Description	Activity Date
CS	County Para-transit Service	04-SEP-1991
DR	Department of Rehabilitation	07-NOV-1991
DS	Disabled Student Services	04-SEP-1991
HA	Hearing aid required	16-AUG-1991



Section B: Set Up

Lesson: Name Type Validation (GTVNTYP)

◀ Jump to TOC

Introduction

Use the Name Type Validation Form (GTVNTYP) to define codes for name types that can be associated with ID names. Examples of name types include maiden, nickname, and legal. These codes can be used for correspondence and reporting.

Banner form

Name Type Validation GTVNTYP 7.0

Code	Description	Activity Date
AAMC	AMCAS Name	28-OCT-2003
CASL	Casual Name	28-OCT-2003
FRML	Formal Name	28-OCT-2003
FUND	Fund Name	28-OCT-2003
LEGL	Legal Name	28-OCT-2003
MAID	Maiden Name	28-OCT-2003
MH	test	02-APR-2004
NICK	Nickname	28-OCT-2003
ORGA	Organizational Name	28-OCT-2003
PREF	Preferred Name	28-OCT-2003



Section B: Set Up

Lesson: State/Province Code Validation (STVSTAT)

◀ Jump to TOC

Introduction

Use the State/Province Code Validation Form (STVSTAT) to create, update, insert, and delete state and province codes (i.e., Delaware, British Columbia, New South Wales, etc.). Forms in several modules use this form to validate the state and province codes. You can only create and update these codes from this form.

Banner form

Code	Description	EDI Equivalent	IPEDS State Code	Canadian Statistics Code	Activity Date
123	Test 123				24-JUN-2004
456	Test 456				24-JUN-2004
78	Test 78				27-APR-2005
999	Unknown				23-JAN-2006
AA	Military - Americas				08-DEC-1995
AB	Alberta	AB			28-JAN-2005
ACT	Australian Capitol Territory				26-JUL-1994
AE	Military - Europe				08-DEC-1995
AK	Alaska	AK			31-AUG-2004
AL	Alabama	AL			31-AUG-2004
AP	Military - Pacific				08-DEC-1995
AR	Arkansas	AR			31-AUG-2004
AS	American Samoa	AS			20-JUN-2005
AZ	Arizona	AZ			31-AUG-2004
BC	British Columbia	BC			31-AUG-2004
CA	California	CA			31-AUG-2004
CM	Northern Mariana Islands				18-AUG-1987
CO	Colorado	CO			31-AUG-2004
CT	Connecticut	CT			31-AUG-2004
CZ	Canal Zone				18-AUG-1987
DC	District of Columbia	DC			31-AUG-2004



Section B: Set Up

Lesson: Address Type Code Validation (STVATYP)

◀ Jump to TOC

Introduction

Use this form to create; update, insert, and delete address type codes, such as Billing, Permanent, or Mailing. Other forms use this form to validate these codes, which you can only create or update from this form. Notice that you also cross-reference a telephone type to an address type.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form

Address Type	Description	Telephone Type	Description	System Required	Activity Date
B1	Billing	B1	Billing	<input checked="" type="checkbox"/>	13-OCT-2005
BU	Business	BU	Business or work	<input checked="" type="checkbox"/>	03-MAY-1991
DA	Dormitory Address	RH	Residence Hall	<input type="checkbox"/>	01-JUL-2004
DP	Diploma			<input type="checkbox"/>	15-MAR-2006
EM	Emergency Contact	EMER	Emergency Contact	<input type="checkbox"/>	30-MAR-1995
FA	Firm Address	FA	Firm Address	<input type="checkbox"/>	01-AUG-1991
FO	Faculty Office	FO	Faculty Office	<input type="checkbox"/>	14-SEP-2004
FR	1042 Foreign Address			<input type="checkbox"/>	31-AUG-2004
HO	Home Address			<input type="checkbox"/>	25-JAN-2005
HQ	Corporate Headquarters	HQ	Corporate Headquarters	<input type="checkbox"/>	03-JUN-1990
LL	Loc Mgt			<input type="checkbox"/>	22-FEB-2005
MA	Mailing	MA	Mailing	<input checked="" type="checkbox"/>	10-AUG-2005
MC	Mailing			<input type="checkbox"/>	19-JAN-2006
MG	Matching Gift Address	MG	Matching Gift	<input type="checkbox"/>	07-JAN-1991
P1	Parent 1	P1	Parent 1	<input type="checkbox"/>	03-JAN-1995
P2	Parent 2	P2	Parent 2	<input type="checkbox"/>	03-JAN-1995
P3	Parent 3	P3	Parent 3	<input type="checkbox"/>	03-JAN-1995
P4	Parent 4	P4	Parent 4	<input type="checkbox"/>	03-JAN-1995
PA	Parents	PA	Parents	<input checked="" type="checkbox"/>	16-MAR-2006
PO	Order Address			<input type="checkbox"/>	13-DEC-2005
PR	Permanent	PR	Permanent	<input type="checkbox"/>	08-AUG-2005
RH	Residence Hall	RH	Residence Hall	<input type="checkbox"/>	06-APR-1995



Section B: Set Up

Lesson: Zip Postal Code Validation (GTVZIPC)

◀ [Jump to TOC](#)

Introduction

Use this form to identify ZIP codes and postal codes used throughout Banner. You can assign ZIP/postal codes to

- sites on the Site Code Validation Form (STVSITE)
- buildings on the Building Definition Form (SLABLDG)
- recruits on the Quick Recruit Form (SRAQUIK)
- donors on the Gift Form (AGAGIFT).

Defining ZIP/postal codes on this form can help you enter addresses in Banner more accurately. If you are on an application form and select a ZIP/postal code from a List of Values, address data from GTVZIPC automatically appears in the associated fields on the form.



Section B: Set Up

Lesson: Zip Postal Code Validation (GTVZIPC) (Continued)

◀ Jump to TOC

Banner form

ZIP or Postal Code	City	County	State or Province	Nation	Activity Date
00802	Saint Thomas		VI		10-NOV-2005
00983	Carolina		PR		03-MAR-2004
01040	Holyoke test		MA		17-NOV-2004
01063	Northampton		MA		17-NOV-2004
01247	North Adams		MA		05-MAY-2004
01301	Greenfield		MA		03-MAR-2004
01440	Gardner		MA		03-MAR-2004
01610	Worcester		MA		03-MAR-2004
01923	Danvers		MA		03-MAR-2004
02116	Boston		MA		10-NOV-2004
02138	Cambridge		MA		03-MAR-2004
02139	Cambridge		MA		03-MAR-2004
02154	Waltham		MA		03-MAR-2004
02180	Stoneham		MA		27-JUL-2004
02181	Wellesley		MA		03-MAR-2004
02186	Milton		MA		03-MAR-2004
02720	Fall River		MA		03-MAR-2004
02747	North Dartmouth		MA		03-MAR-2004
02766	Norton		MA		03-MAR-2004
02886	Warwick		RI		03-MAR-2004
02912	Providence		RI		03-MAR-2004
03102	Manchester		NH		11-JAN-1995



Section B: Set Up

Lesson: County Code Validation (STVCNTY)

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Introduction

You use this form to create, update, insert, and delete county codes such as Delaware, Polk, or Missoula. This form is used by forms in several modules to validate the county codes. These codes can only be created or updated from this form.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form

Code	Description	Activity Date
001	Chester	31-MAR-1987
002	Montgomery	31-MAR-1987
003	Delaware	31-MAR-1987
004	Missoula	03-AUG-1987
005	Roanoke	10-AUG-1987
006	Orange	10-AUG-1987
007	Franklin	10-AUG-1987
008	Okaloosa	10-AUG-1987
009	Harris	10-AUG-1987
010	Polk	10-AUG-1987
011	Lorain	18-DEC-1987
012	Fairfax	21-JAN-1988
013	Centre	04-JUN-1990
014	Berks	04-JUN-1990
015	Philadelphia	04-JUN-1990
016	Lehigh	04-JUN-1990
017	Allegheny	04-JUN-1990
018	Wayne	04-JUN-1990
019	Westchester	07-JAN-1991
020	Bucks	07-JAN-1991



Section B: Set Up

Lesson: Nation Code Validation (STVNATN)

◀ Jump to TOC

Introduction

You use this form to create, update, insert, and delete nation codes (i.e., Australia, France, Iceland, etc.). Forms in several modules use this form to validate the nation codes. You can only create and update these codes from this form.

Banner form

Nation Code	Description	SEVIS Equivalent	EDI Equivalent	LMS Equivalent	ISO Code	Canadian Statistics Code	MMREF Code	Activity Date
1	Afghanistan	1			19			11-JAN-2005
2	Albania	AL			ALB			21-MAR-2005
3	Algeria				14			14-JAN-2005
4	Andorra				WSM			02-MAR-2005
5	Angola							29-APR-1987
6	Antigua and Barbuda							29-APR-1987
7	Argentina							29-APR-1987
8	Australia	AS	AS				AS	28-JAN-2005
9	Austria							29-JUL-2004
11	Bahrain							29-APR-1987
12	Bangladesh							29-APR-1987
13	Barbados							29-APR-1987
174	Belarus							21-JUN-2005
14	Belgium	BE	BE				BE	21-MAR-2005
15	Belize							29-APR-1987
16	Benin							29-APR-1987
BER	Bermuda							18-JUL-2005
BERMU	Bermuda							18-JUL-2005
17	Bhutan							29-APR-1987
18	Bolivia							29-APR-1987
19	Botswana							29-APR-1987
20	Brazil		BZ				BZ	29-NOV-2005
21	Brunei							29-APR-1987



Section B: Set Up

Lesson: Telephone Type Validation (STVTELE)

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Introduction

You use this form to create, update, insert, and delete telephone types such as Car, Residence Hall, Business, etc. Several forms in various modules use this form to validate telephone types. You can only create and update these types from this form. Telephone types are cross-referenced to address types on the Address Type Code Validation Form (STVATYP).

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form

Telephone Type Validation STVTELE 7.0

Code	Description	Activity Date
APIS	API TESTS	26-FEB-2004
BI	Billing	24-JAN-1992
BU	Business or work	26-JUL-1994
CAR	Car	24-JAN-1992
CELL	Cell Phone	25-AUG-2005
EMER	Emergency Contact	30-MAR-1995
FA	Firm Address	24-JAN-1992
FAX	Fax	24-JAN-1992
FO	Faculty Office	14-SEP-2004
HQ	Corporate Headquarters	24-JAN-1992
MA	Mailing	24-JAN-1992
MG	Matching Gift	03-JAN-1995
MO	Mobile Phone	27-APR-2005
P1	Parent 1	03-JAN-1995
P2	Parent 2	03-JAN-1995
P3	Parent 3	03-JAN-1995
P4	Parent 4	03-JAN-1995
PA	Parents	24-JAN-1992
PE	Private Residence	30-MAR-2006
PR	Permanent	03-JAN-1995
RH	Residence Hall	06-APR-1995



Section B: Set Up

Lesson: Address Source Validation (STVASRC)

◀ Jump to TOC

Introduction

This form maintains user-defined codes that identify address sources such as, Self-Reported, Post Office Change, or Electronic Data Interchange.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form

 Address Source Validation STVASRC 7.0

Code	Description	Activity Date
AAMC	AMCAS	06-JUL-2004
ADIR	Adirondack Room Assignment	12-MAY-2005
CALL	Phone call from individual	22-JAN-1992
EDI	Electronic Data Interchange	25-JUN-1996
INFR	Information from relative	22-JAN-1992
PHON	Phonathon received change	22-JAN-1992
POST	Post Office change	03-JAN-1995
RMS	RMS Room Assignment	12-MAY-2005
SELF	Self reported by individual	03-JAN-1995
TAPE	Tapeload	08-AUG-2005
WEB	World Wide Web	25-JUN-1996



Section B: Set Up

Lesson: E-Mail Address Type Validation (GTVEMAL)

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Introduction

Use this form to define valid e-mail address type codes. Examples of e-mail address types include business, personal, and school.

These codes are used on the E-mail Address Form (GOAEMAL) to enter e-mail address information for individuals.

The Description field is required. This text appears on Web pages where users can view or update e-mail information. Once created, an e-mail address type code cannot be changed. The description can be updated any time.

If the Web Ind checkbox is selected, the e-mail type will be included in LOVs in the Banner Self-Service products as a valid address type.

Note: This indicator has no influence on the E-mail Address Form (GOAEMAL). You can use GOAEMAL to determine which e-mail addresses for a particular person should appear on the web. For example, you may want a person's university e-mail address to appear, but not their home e-mail address.

If the URL checkbox is selected, the e-mail address type is a URL.

Banner form

Code	Description	Web	URL	Activity Date
AOL	America On-Line	<input checked="" type="checkbox"/>	<input type="checkbox"/>	03-MAY-2004
API	API_TESTS	<input type="checkbox"/>	<input type="checkbox"/>	26-FEB-2004
BUSI	Business Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	28-MAR-2006
FAEM	Financial Aid Email	<input type="checkbox"/>	<input type="checkbox"/>	07-MAR-2006
GOOG	Google email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	21-MAR-2006
HOME	Home Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	06-JAN-2006
INST	Institutionally Assigned	<input type="checkbox"/>	<input type="checkbox"/>	06-JAN-2006
LONG	Long E-mail address description 0123456789012345678901234567	<input checked="" type="checkbox"/>	<input type="checkbox"/>	29-OCT-2004
MA	Test email integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>	29-AUG-2005
P1	Primary one	<input checked="" type="checkbox"/>	<input type="checkbox"/>	21-JUL-2005
URL	URL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12-JUL-2004
WORK	Work Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	24-NOV-2004
WWW	Test email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	09-SEP-2005
YAH	Yahoo email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	09-SEP-2005



Section B: Set Up

Lesson: EDI/ISO Standard Code Validation (GTVSCOD)

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Introduction

Use this form to display the EDI/ISO standard code lists that are used in EDI documents.

Banner form

EDI/ISO Standard Code Validation GTVSCOD 7.0

Element	Code	Description	Standard	Activity Date
0001	UNOA	UN/ECE level A: As defined in ISO 646 (with the	E	14-FEB-2005
0001	UNOB	UN/ECE level B: As defined in ISO 646.	E	14-FEB-2005
0001	UNOC	UN/ECE level C: As defined in ISO 8859-1 : Info	E	14-FEB-2005
0001	UNOD	UN/ECE level D: As defined in ISO 8859-2 : Info	E	14-FEB-2005
0001	UNOE	UN/ECE level E: As defined in ISO 8859-5 : Info	E	14-FEB-2005
0001	UNOF	UN/ECE level F: As defined in ISO 8859-7 : Info	E	14-FEB-2005
0002	1	Version 1: ISO 9735:1988.	E	14-FEB-2005
0002	2	Version 2: ISO 9735:1990.	E	14-FEB-2005
0002	3	Version 3: ISO 9735 Amendment 1:1992.	E	14-FEB-2005
0007	1	DUNS (Dun & Bradstreet)	E	14-FEB-2005
0007	103	TW, Trade-van: Trade-van is an EDI VAN servic	E	14-FEB-2005
0007	12	Telephone number	E	14-FEB-2005
0007	14	EAN (European Article Numbering Association)	E	14-FEB-2005
0007	18	AIAG (Automotive Industry Action Group)	E	14-FEB-2005
0007	22	INSEE (Institut National de la Statistique et des I	E	14-FEB-2005
0007	30	ISO 6523Organization identification	E	14-FEB-2005
0007	31	DIN (Deutsches Institut fuer Normung): German	E	14-FEB-2005
0007	33	BfA (Bundesversicherungsanstalt fuer Angestellte	E	14-FEB-2005
0007	34	National Statistical Agency	E	14-FEB-2005
0007	4	IATA (International Air Transport Association)	E	14-FEB-2005



Section B: Set Up

Lesson: Language Code Validation (STVLANG)

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Introduction

This form is used to create, update, insert, and delete language codes. These codes may refer to languages such as Chinese, English, or Spanish. This form is used by other forms to validate language codes. You may only create or update language codes from this form.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form

Code	Description	Activity Date
ARA	Arabic	09-OCT-1990
CHC	Chinese - Cantonese	09-OCT-1990
ENG	English	09-OCT-1990
FRN	French	09-OCT-1990
GRK	Greek	09-OCT-1990
GRM	German	09-OCT-1990
HUN	Hungarian	09-OCT-1990
ITL	Italian	09-OCT-1990
JPN	Japanese	09-OCT-1990
RUS	Russian	09-OCT-1990
SPN	Spanish	09-OCT-1990
SWD	Swedish	09-OCT-1990



Section B: Set Up

Lesson: Port of Entry Validation (STVPENT)

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Introduction

You use this form to create, update, insert, and delete port of entry codes such as Miami Port Authority, New York City Port Authority, San Francisco Port Authority, etc. The International Information Form (GOINTL) uses this form to validate the port of entry codes. You can only create and update these codes from this form.

Banner form

Code	Description	SEVIS Equivalent	Activity Date
EPM	Eastport, ME	EPM	07-FEB-2005
MIA	Miami Port Authority	MIA	07-FEB-2005
NYC	New York City Port Authority	NYC	25-AUG-2004
SET	Seattle	SET	25-AUG-2004
SFS	San Francisco Port Authority	SFS	25-AUG-2004



Section B: Set Up

Lesson: Visa Type Code Validation (STVVTYP)

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Introduction

You use this form to create, update, insert, and delete visa type codes (i.e., Tourist, Student Visa, Exchange Scholar, etc.). The International Information Form (GOAINTL) uses this form to validate the visa type codes. You can only create and update these codes from this form.

Banner form

Visa Type	Description	Admissions Checklist Request Item	Description	Non-Resident	Voice Response Message Number	Canadian Statistics Code	SEVIS Code	Activity Date
B2	Tourist			<input type="checkbox"/>				15-JUN-2005
E2	Dependent of Foreign Investor			<input type="checkbox"/>		0		20-JUN-2005
F1	Student Visa	VISA	Visa Papers	<input checked="" type="checkbox"/>			01	25-OCT-2004
F2	Dependent of Student			<input type="checkbox"/>			04	01-MAR-2004
H1	Special			<input type="checkbox"/>				18-AUG-1987
H2	Dependent of Special			<input type="checkbox"/>				18-AUG-1987
J1	Exchange Scholar			<input type="checkbox"/>			03	06-JUL-2004
J2	Dependent of Exchange Scholar			<input type="checkbox"/>			06	22-JUN-2004
M1	Vocational Student			<input type="checkbox"/>			02	07-FEB-2005
M2	Dependent of Vocational Studen			<input type="checkbox"/>			05	07-FEB-2005
OT	Other			<input type="checkbox"/>				18-AUG-1987
PR	Permanent Resident			<input type="checkbox"/>				18-AUG-1987
RA	Resident Alien			<input type="checkbox"/>				18-AUG-1987
				<input type="checkbox"/>				
				<input type="checkbox"/>				



Section B: Set Up

Lesson: International Student Sponsor Code Validation (STVSPON)

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Introduction

You use this form to create, update, insert, and delete sponsor codes (i.e., Bnai Brith, Knights of Columbus, Sunshine Foundation, etc.). The International Information Form (GOAINTL) uses this form to validate the sponsor codes. You can only create and update these codes from this form.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form

International Student Sponsor Code Validation STVSPON 7.0		
Code	Description	Activity Date
BNB	Bnai Brith	18-AUG-1987
DAR	Daughters/American Revolution	01-MAY-1987
KOC	Knights of Columbus	18-AUG-1987
NAA	NAACP	31-MAR-1987
RBC	Riverside Baptist Church	18-AUG-1987
SOI	Sons of Italy	18-AUG-1987
STA	St Andrews Catholic Church	18-AUG-1987
STJ	St Johns Episcopal Church	18-AUG-1987
SUN	Sunshine Foundation	31-MAR-1987
TBI	Temple Beth Israel	09-OCT-1987



Section B: Set Up

Lesson: Employment Validation Form (STVEMPT)

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Introduction

This form is used to create, update, insert, and delete employment types, such as Self-employed, Employer Sponsored, or No Employment on Record. This form is used by other forms to validate employment types. You may only create or update employment types from this form.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form

Code	Description	Activity Date
EMP	Employment Required for Visa	09-OCT-1990
FAM	Family Business	09-OCT-1990
STU	Student Worker	09-OCT-1990



Section B: Set Up

Lesson: Citizen Type Code Validation (STVCITZ)

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Introduction

You use this form to create, update, insert, and delete citizen type codes (i.e., Canadian Citizen, Student Visa, etc.). This form is used by the General Person Form (SPAPERS) to validate the citizen type codes. You can only create or update these codes from this form.

Banner form

Code	Description	Citizen Indicator	EDI Equivalent	Activity Date
CZ	Citizen	<input checked="" type="checkbox"/>	<input type="checkbox"/>	27-JUN-2005
N	Non-Citizen	<input type="checkbox"/>	<input type="checkbox"/>	22-JAN-1992
NR	Non-resident Alien	<input type="checkbox"/>	<input type="checkbox"/>	08-JUL-2004
OT	Other	<input type="checkbox"/>	<input type="checkbox"/>	27-JUN-2005
RA	Resident Alien	<input type="checkbox"/>	<input type="checkbox"/>	20-APR-2006
Y	Citizen	<input checked="" type="checkbox"/>	<input type="checkbox"/>	22-JAN-1992
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	



Section B: Set Up

Lesson: Ethnic Code Validation (STVETHN)

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Introduction

This form is used to create, update, insert, and delete ethnic codes (Caucasian, Chinese, Cuban, etc.). This form is used by other forms to validate ethnic codes. You may only create or update ethnic codes from this form.

Banner form

Ethnic Code	Description	IPEDS Code	EDI Equivalent	LMS	Institution Race Code	New Ethnicity	Activity Date
1	White/Caucasian	5	<input type="checkbox"/>	<input type="checkbox"/>	CAU Caucasian	None	30-JAN-2006
10	Samoan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CAM CALifornian-American	Not Hispanic or Latino	02-SEP-2005
11	Asian Indian	3	<input type="checkbox"/>	<input type="checkbox"/>	2AB Asian Chinese	None	22-SEP-2005
2	Black or African-American	1	<input type="checkbox"/>	<input type="checkbox"/>	2AB Asian Chinese	Not Hispanic or Latino	21-SEP-2005
3	Hispanic-Other	4	<input type="checkbox"/>	<input type="checkbox"/>	2AB Asian Chinese	Hispanic or Latino	25-AUG-2005
3C	Cuban	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2AA Asian Korean	Hispanic or Latino	07-SEP-2005
3M	Mexican, Mex American, Chicano	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		None	29-MAR-2006
3P	Puerto Rican	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		None	31-MAR-1995
4	Asian	3	<input type="checkbox"/>	<input type="checkbox"/>	2AC Asian Indian	Hispanic or Latino	25-AUG-2005
4B	Other Pacific Islander	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		None	13-JUL-2005
5	Sioux	2	<input type="checkbox"/>	<input type="checkbox"/>		None	03-MAR-1992
50	Not Spanish,Hispanic or Latino	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		None	24-JUN-2005
6	Other	6	<input type="checkbox"/>	<input type="checkbox"/>		None	03-MAR-1992
7	Testing 7.0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		None	20-FEB-2004
8	American Indian/Alaska Native	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		None	13-JUL-2005
9	Guamanian or Chamorro	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		None	06-SEP-2005
AA	Test aa	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		None	06-AUG-2004
AS	Argentinean South American	4	<input type="checkbox"/>	<input type="checkbox"/>	AR Argentinean	Hispanic or Latino	27-JAN-2006
C2	Script test 2 do not change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		None	27-JAN-2006
C3	script test do not change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CMS Eskimo	Not Hispanic or Latino	27-JAN-2006
C4	script test 4 do not change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Hispanic or Latino	27-JAN-2006
CH	Chinese	3	<input type="checkbox"/>	<input type="checkbox"/>		None	10-MAR-2005



Section B: Set Up

Lesson: Marital Status Code Validation (STVMRTL)

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Introduction

You use this form to create, update, insert, and delete marital status codes (i.e., Married, Single, Widowed, etc.). The General Person Form (SPAPERS) uses this form to validate the marital status codes. You can only create and update these codes from this form.

Banner form

Code	Description	FA Equiv	EDI Equiv	Activity Date
A	Test a	S	<input type="checkbox"/>	24-JUN-2004
D	Divorced	D	<input type="checkbox"/>	03-DEC-1987
M	Married	M	<input type="checkbox"/>	03-DEC-1987
P	Separated	P	<input type="checkbox"/>	03-DEC-1987
S	Single	S	<input type="checkbox"/>	31-MAR-1987
W	Widowed	W	<input type="checkbox"/>	03-DEC-1987
			<input type="checkbox"/>	
			<input type="checkbox"/>	



Section B: Set Up

Lesson: Religion Code Validation (STVRELG)

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Introduction

You use this form to create, update, insert, and delete religion codes (i.e., Baptist, Hindu, Lutheran, etc.). The General Person Form (SPAPERS) uses this form to validate the religion codes. You can only create and update these codes from this form.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form

Code	Description	Activity Date
12	Test 12	24-JUN-2004
BA	Baptist	02-OCT-1987
BU	Buddhist	03-JUN-1990
CA	Catholic	18-AUG-1987
CH	Christian	26-JUL-1994
HI	Hindu	03-JUN-1990
JE	Jewish	31-MAR-1987
LU	Lutheran	02-OCT-1987
ME	Methodist	02-OCT-1987
MO	Moslem	03-JUN-1990
OT	Other	09-OCT-1987
PR	Protestant	31-MAR-1987



Section B: Set Up

Lesson: Legacy Code Validation (STVLGCY)

◀ Jump to TOC

Introduction

You use this form to create, update, insert, and delete legacy codes to designate alumni relationships (i.e., Father, Mother, Brother, etc.). Several forms in various modules use this form to validate the legacy codes. You can only create and update these codes from this form.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form

Code	Description	Activity Date
A	Aunt	17-AUG-1987
B	Brother	27-APR-1987
C	Cousin	09-AUG-1991
F	Father	03-JUL-1991
G	Grandparent	03-JUL-1991
M	Mother	03-JUL-1991
P	Parents	03-JUL-1991
S	Sister	27-APR-1987
U	Uncle	17-AUG-1987
X	Multiple	06-JAN-1995



Section B: Set Up

Lesson: IPEDS Ethnic Code Validation (STVETCT)

◀ Jump to TOC

Introduction

You use this form to create, update, insert, and delete IPEDS ethnic codes (i.e., American Indian or Alaskan Native, Asian or Pacific Islander, Hispanic, etc.). The Ethnic Code Validation Form (STVETHN) uses this form to validate IPEDS ethnic codes for the IPEDS Completion Report (SHRICIP). You may only create or update these codes from this form.

Banner form

Code	Description	System Req	Activity Date
1	Black Non-Hispanic	<input checked="" type="checkbox"/>	07-SEP-1990
2	Am. Indian or Alaskan Native	<input checked="" type="checkbox"/>	07-SEP-1990
3	Asian or Pacific Islander	<input checked="" type="checkbox"/>	07-SEP-1990
4	Hispanic	<input checked="" type="checkbox"/>	07-SEP-1990
5	White Non-Hispanic	<input checked="" type="checkbox"/>	07-SEP-1990



Section B: Set Up

Lesson: Self Check

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Directions

Use the information you have learned in this workbook to complete this self check activity.

Question 1

Match the form to its description by filling in the blank with the correct letter.

- | | | |
|---------------------------------------|-------|--|
| a. Recruiter Code Validation | _____ | create, update, insert, and delete originator codes |
| b. Appointment result Code Validation | _____ | create, update, insert and delete state and province codes |
| c. Comment Type Code Validation | _____ | create, update, insert, and delete disability type codes |
| d. Originator Code Validation | _____ | create, update, insert, and delete disability service codes |
| e. Contact Type Validation | _____ | create, update, insert, and delete nation codes |
| f. Relation Code Validation | _____ | view and update medical conditions of people at your institution |
| g. General Medical Information | _____ | identify zip codes and postal codes used throughout Banner |
| h. Disability Type Code Validation | _____ | create, update, insert, and delete recruiter codes |
| i. Disability Service Code Validation | _____ | create, update, insert, and delete address type codes |
| j. Name Type Validation | _____ | create, insert, and delete county codes |
| k. State/Province Code Validation | _____ | create, update, insert and delete comment types and their respective codes |
| l. Address Type Code Validation | _____ | define codes for name types that can be associated with ID names |
| m. Zip Postal Code Validation | _____ | create, update, insert, and delete relation codes |



Section B: Set Up

Lesson: Self Check (Continued)

◀ [Jump to TOC](#)

- n. County Code Validation _____ create, update, insert and delete appointment result codes
- o. Nation Code Validation _____ create, update insert, and delete recruiting contact type codes



Section B: Set Up

Lesson: Self Check (Continued)

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Question 2

Match the form to its description by filling in the blank with the correct letter.

- | | | |
|--|-------|--|
| a. Telephone Type Validation | _____ | display the EDI/ISO standard code lists that are used in EDI documents |
| b. Address Source Validation | _____ | create, update, insert, and delete ethnic codes |
| c. E-Mail Address Type Validation | _____ | create, update, insert, and delete sponsor codes |
| d. EDI/ISO Standard Code Validation | _____ | create, update, insert, and delete employment types |
| e. Language Code Validation | _____ | create, update, insert, and IPEDS ethnic codes |
| f. Port of Entry Validation | _____ | create, update, insert, and delete visa type codes |
| g. Visa Type Code Validation | _____ | create, update, insert and delete religion codes |
| h. International Student Sponsor Code Validation | _____ | create, update, insert, and delete telephone types |
| i. Employment Validation Form | _____ | create, update, insert, and delete marital status codes |
| j. Citizen Type Code Validation | _____ | create, insert, delete legacy codes to designate alumni relationships |
| k. Ethnic Code Validation | _____ | define valid e-mail address type codes |
| l. Marital Status Code Validation | _____ | create, update, insert, or delete citizen type codes |
| m. Religion Code Validation | _____ | create, update, insert, and delete port of entry codes |



Section B: Set Up

Lesson: Self Check (Continued)

◀ [Jump to TOC](#)

Procedure, continued

- n. Legacy Code Validation _____ maintain user-defined codes that identify address sources
- o. IPEDS Ethnic Code Validation _____ create, update, insert, and delete language codes



Section B: Set Up

Lesson: Answer Key for Self Check

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Question 1

Answers are in bold.

- | | |
|---------------------------------------|--|
| a. Recruiter Code Validation | d. create, update, insert, and delete originator codes |
| b. Appointment result Code Validation | k. create, update, insert and delete state and province codes |
| c. Comment Type Code Validation | h. create, update, insert, and delete disability type codes |
| d. Originator Code Validation | i. create, update, insert, and delete disability service codes |
| e. Contact Type Validation | o. create, update, insert, and delete nation codes |
| f. Relation Code Validation | g. view and update medical conditions of people at your institution |
| g. General Medical Information | m. identify zip codes and postal codes used throughout Banner |
| h. Disability Type Code Validation | a. create, update, insert, and delete recruiter codes |
| i. Disability Service Code Validation | l. create, update, insert, and delete address type codes |
| j. Name Type Validation | n. create, insert, and delete county codes |
| k. State/Province Code Validation | c. create, update, insert and delete comment types and their respective codes |
| l. Address Type Code Validation | j. define codes for name types that can be associated with ID names |
| m. Zip Postal Code Validation | f. create, update, insert, and delete relation codes |



Section B: Set Up

Lesson: Answer Key for Self Check (Continued)

◀ [Jump to TOC](#)

Procedure, continued

- | | |
|---------------------------|--|
| n. County Code Validation | b. create, update, insert and delete appointment result codes |
| o. Nation Code Validation | e. create, update insert, and delete recruiting contact type codes |



Section B: Set Up

Lesson: Answer Key for Self Check (Continued)

◀ Jump to TOC

Question 2

Answers are in bold.

- | | |
|--|--|
| a. Telephone Type Validation | d. display the EDI/ISO standard code lists that are used in EDI documents |
| b. Address Source Validation | k. create, update, insert, and delete ethnic codes |
| c. E-Mail Address Type Validation | h. create, update, inset, and delete sponsor codes |
| d. EDI/ISO Standard Code Validation | i. create, update, insert, and delete employment types |
| e. Language Code Validation | o. create, update, insert, and IPEDS ethnic codes |
| f. Port of Entry Validation | g. create, update, insert, and delete visa type codes |
| g. Visa Type Code Validation | m. create, update, insert and delete religion codes |
| h. International Student Sponsor Code Validation | a. create, update, insert, and delete telephone types |
| i. Employment Validation Form | l. create, update, insert, and delete marital status codes |
| j. Citizen Type Code Validation | n. create, insert, delete legacy codes to designate alumni relationships |
| k. Ethnic Code Validation | c. define valid e-mail address type codes |
| l. Marital Status Code Validation | j. create, update, insert, or delete citizen type codes |
| m. Religion Code Validation | f. create, update, insert, and delete port of entry codes |



Section B: Set Up

Lesson: Answer Key for Self Check (Continued)

◀ [Jump to TOC](#)

Procedure, continued

- n. Legacy Code Validation
- o. IPEDS Ethnic Code Validation
- b. maintain user-defined codes that identify address sources
- e. create, update, insert, and delete language codes



Section C: Day-to-Day Operations

Lesson: Overview

◀ [Jump to TOC](#)

Introduction

The purpose of this section is to explain the day-to-day or operational procedures to capture and maintain biographic/demographic data for persons at your institution.

Intended audience

The staff of the Admissions Office and Recruitment Office, as well as selected personnel who maintain biographic and demographic data for prospects

Objectives

At the end of this section, you will be able to

- define a person and/or non-person to General Person
- maintain supporting General Person information
- produce General Person reports.

Prerequisites

To complete this section, you should have completed the Education Practices computer-based training (CBT) tutorial “Banner 7 Fundamentals,” or have equivalent experience navigating in Banner.

You will also need to ensure that the rules and validation codes in Banner Student needed for General Person have been set up for you.



Section C: Day-to-Day Operations

Lesson: Overview (Continued)

◀ Jump to TOC

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Section C: Day-to-Day Operations

Lesson: Process Introduction

◀ Jump to TOC

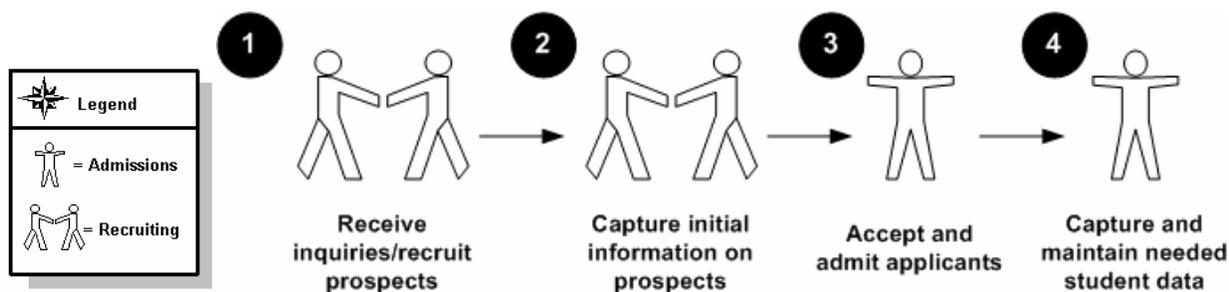
About the process

- Recruiting personnel create initial records for prospects. This data can roll to Admissions and be used in other modules.
- Student information is created and maintained by various personnel throughout the entire Student process.

Note: Everyone needs to have an ID in Banner. Therefore, a General Person record (whether a recruit, an applicant, an employee, or an alumnus) would need to be created.

Flow diagram

This diagram highlights the processes used to capture and maintain biographic and demographic information for students



What happens

The stages of the process are described in this table.

Stage	Description
Recruiting Personnel	
1	Receive inquiries and recruit prospects.
2	Capture initial information on prospects.
Admissions Personnel	
3	Accept applicants.
4	Capture and maintain applicant information as needed.



Section C: Day-to-Day Operations

Lesson: Establishing a Person/Generating an ID

◀ Jump to TOC

Introduction

The General Person Identification Form (SPAIDEN) is used to capture biographic/demographic information for all persons/non-persons associated with the institution.

Before a person can become a recruit, applicant, student, or instructor or have an account, the person must first be identified to the Banner system with a name and an identification number. Completely identify this person's name to the Banner system using the Identification Form (SPAIDEN).

Banner form

General Person Identification SPAIDEN 7.3
Confidential

ID: 210009208 Ranson, Rose Generate ID:

Current Identification Alternate Identification Address Telephone Biographical E-mail Emergency Contact

ID: 210009208 Name Type:

Person

Last Name: Ranson
First Name: Rose
Middle Name:
Prefix:
Suffix:
Preferred First Name:
Full Legal Name:

Non-Person

Name:

ID and Name Source

Last Update

User: SAISUSR
Activity Date: 11-DEC-1995
Origin: SPAIDEN

Original Creation

User:
Create Date:

Avoiding duplicates

When you attempt to add a new person or non-person to the system, the Common Matching Entry Form (GOAMTCH) will be automatically called, based on the settings at your institution. This form enables you to avoid adding duplicate entries to the database.



Section C: Day-to-Day Operations

Lesson: Establishing a Person/Generating an ID (Continued)

◀ Jump to TOC

Fields

Use the information in the table to complete the procedure that follows.

Field Name	Description	Value
Key block		
ID	9 character code Identification number associated with the person/non-person being added to the system Click Generate ID icon to assign an ID	GENERATED
Current Identification block		
ID	9 character code Create or update a current identification number associated with this ID Required	GENERATED
Name Type	30 character free-form text Type of name associated with this ID	LEG (legal)
Person Name Information block		
Last Name	60 character name Last name associated with this ID Use either your last name, or the name that was not located in the system from Lesson 1 Margaret Jane Smith would enter <i>Smith</i> Required if ID is for a person	[Your last name] (Smith)
First Name	15 character name First name associated with this ID Use the first name corresponding with the last name Margaret Jane Smith would enter <i>Margaret</i> Required if ID is for a person	[Your first name] (Margaret)



Section C: Day-to-Day Operations

Lesson: Establishing a Person/Generating an ID (Continued)

◀ Jump to TOC

Fields, continued

Field Name	Description	Value
Person Name Information block, continued		
Middle Name	15 character name Middle name associated with this ID Use the middle name corresponding with the last name Margaret Jane Smith would enter <i>Jane</i>	[Your middle name] (Jane)
Prefix	20 character name prefix Name prefix associated with this ID Use the name prefix corresponding with the last name Margaret Jane Smith would enter <i>Miss</i>	[Your name prefix] (Miss)
Suffix	20 character name suffix Name suffix associated with this ID Use the name suffix corresponding with the last name John Smith, Jr. would enter <i>Jr.</i>	Blank
Preferred First Name	15 character name Preferred name associated with this ID Use the preferred name corresponding with the last name Margaret Jane Smith would enter <i>Maggie</i>	[Your preferred name] (Maggie)
Non-Person Information block		
Name	60 character free-form text Enter the name of a non-person entry Required if ID is for a non-person	Blank if person



Section C: Day-to-Day Operations

Lesson: Establishing a Person/Generating an ID (Continued)

◀ Jump to TOC

Exercise

Enter an individual into the Banner System. Use the table on the previous pages when needed. The recruit this exercise will create is named Margaret Jane Smith. Subsequent exercises will also use her as an example. Please feel free to use your own name or a unique fictitious name when following these examples. If you do so, substitute that name for Margaret's in subsequent exercises.

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Identification Form (SPAIDEN).
2	Select the Generate ID icon. <u>Result:</u> You are taken to the Common Matching Entry Form (GOAMTCH) if this has been enabled on your system. This will ensure the person does not already exist in the system. If this has not been enabled, skip to step 11.
3	Select a matching source in the Matching Source field, if necessary.
4	Perform a Next Block function.
5	Enter the last name of the person in the Last Name field.
6	Enter the first name of the new person in the First Name field. <u>Note:</u> The remaining fields, Middle Name , Prefix , Suffix , and Pref. First Name fields are optional.
7	Click the Duplicate Check icon. <u>Note:</u> If the person already exists in the system, the name will appear on the Match tab. If this happens, perform a Rollback function and enter a different last name and first name to create a new person.
8	Click the Yes button to create the new person.
9	Click OK at the prompt. <u>Result:</u> You are returned to the key block of SPAIDEN; the new ID appears in the ID field.
10	Perform a Next Block function. <u>Result:</u> The Last Name and First Name fields are completed.



Section C: Day-to-Day Operations

Lesson: Establishing a Person/Generating an ID (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action
11	Complete any additional information if necessary and click the Save icon. <u>Note:</u> Notice that a Generated ID number populates both ID fields.
12	Click the Exit icon.



Section C: Day-to-Day Operations

Lesson: Establishing a Person/Generating an ID (Continued)

◀ Jump to TOC

Procedure

Follow these steps to enter a non-person into the Banner System. Use the table on the previous pages when needed.

Note: A non-person can be a bank, vendor, corporation, outside contractors, etc.

Step	Action
1	Access the Identification Form (SPAIDEN).
2	Select the Generate ID icon. <u>Result:</u> You are taken to the Common Matching Entry Form (GOAMTCH), if this has been enabled on your system. This will allow you to ensure the person does not already exist in the system. If this has not been enabled, skip to step 9.
3	Click the down arrow next to the Matching Source field to select a matching source, if necessary.
4	Perform a Next Block function.
5	Enter the non-person name in the Non-Person Name field. <u>Note:</u> The remaining fields are optional.
6	Click the Duplicate Check icon. <u>Note:</u> If the person already exists in the system, the name will appear on the Match tab. If this happens, perform a Rollback function and enter a different last name and first name to create a new person.
7	Click the Yes button to create the new non-person.
8	Click OK at the prompt. <u>Result:</u> You are returned to the key block of SPAIDEN; the new ID appears in the ID field.
9	Perform a Next Block function. <u>Result:</u> The Last Name and First Name fields are completed.
10	Complete any additional information if necessary and click the Save icon. <u>Note:</u> Notice that a Generated ID number populates both ID fields.
11	Click the Exit icon.



Section C: Day-to-Day Operations

Lesson: Assigning an Address/Multiple Addresses to an ID

◀ Jump to TOC

Introduction

Once a person/non-person has received an ID (identification) number, additional information can be entered to further identify that person/non-person to the system. You need to enter address information into the system for the person assigned an ID number previously.

Use the Address tab of the Identification Form (SPAIDEN) to assign addresses.

Banner form

The screenshot displays the SPAIDEN 7.3 software interface. At the top, the window title is "General Person Identification SPAIDEN 7.3". Below the title bar, there is a field for "ID:" with the value "777123456" and a dropdown menu showing "Taylor, McKenzie". To the right is a "Generate ID:" button with a refresh icon. Below this is a tabbed interface with the following tabs: "Current Identification", "Alternate Identification", "Address" (which is selected and highlighted in blue), "Telephone", "Biographical", "E-mail", and "Emergency Contact". The "Address" tab contains the following fields and options:

- From Date:** 23-MAY-2006 (with a calendar icon) and **To Date:** (empty field with a calendar icon).
- Address Type:** MA (dropdown) Mailing
- Sequence Number:** 1
- Street Line 1:** 123 Winding Way
- Street Line 2:** (empty field)
- Street Line 3:** (empty field)
- City:** Malvern
- State or Province:** PA (dropdown) Pennsylvania
- ZIP or Postal Code:** 19355 (dropdown)
- County:** (empty dropdown)
- Nation:** (empty dropdown)
- Telephone Type:** MA (dropdown) Mailing
- Telephone:** (empty field) - (empty field) (empty dropdown)

On the right side of the form, there are several checkboxes and dropdown menus:

- Inactivate Address
- Source:** (empty dropdown)
- Delivery Point:** (empty dropdown)
- Correction Digit:** (empty dropdown)
- Carrier Route:** (empty dropdown)

At the bottom right, there is a "Last Update" box containing:

- User:** SAISUSR
- Activity Date:** 23-MAY-2006



Section C: Day-to-Day Operations

Lesson: Assigning an Address/Multiple Addresses to an ID (Continued)

◀ Jump to TOC

Fields

Use the information in the table to complete the procedure that follows.

Field	Description	Value
Address Type	30 character code The type of address to be entered Required	PR (Permanent)
From Date	11 character date The effective start date of this address <u>Note:</u> Banner automatically assigns the current date which can be overridden.	01-SEP-2004
To Date	11 character date The date this address is no longer in effect	01-SEP-2005
Inactivate Address	Checkbox Is this address inactive?	Unchecked
Street Line 1 Street Line 2 Street Line 3	30 character address At least one line is required	4 Country View Road
Sequence Number	3 character numeric code Sequence number of address within address type System-generated	1
City	20 character city City portion of the address Required	Malvern
State or Province	30 character state State portion of the address Required if no nation provided	PA
ZIP or Postal Code	10 character ZIP/PC code ZIP/postal code portion of the address Required if state/province provided	19355
County	30 character code County portion of the address	001 Chester



Section C: Day-to-Day Operations

Lesson: Assigning an Address/Multiple Addresses to an ID (Continued)

◀ Jump to TOC

Fields, continued

Fieldname	Description	Value
Nation	30 character code Nation portion of the address	157 United States of America
Source	30 character code Identify how the address information was created or updated	CALL Phone call from individual
User	30 character text User who entered this address information System populated	[your user name]
Delivery Point	The delivery point for mail as established by the Postal Service Leave these blank for this exercise	Blank
Activity	11 character date, system-generated	[today's date]
Date	Date the address information was entered	
Telephone	3, 7, and 4 character numbers Area code, phone number, and extension associated with this address	610 5551212 1234
Telephone Type	30 character code Type of phone number	MA Mailing



Section C: Day-to-Day Operations

Lesson: Assigning an Address/Multiple Addresses to an ID (Continued)

◀ Jump to TOC

Procedure

Follow these steps to enter information in the Person Name Information block. Use the table on the previous pages where indicated.

Step	Action
1	Access the Identification Form (SPAIDEN).
2	In the ID field, enter the ID number you generated previously.
3	Perform a Next Block function. Select <u>Address</u> from the Options menu or click the Address tab.
4	Enter address information in the Address window, using the table on the previous pages if necessary. <u>Note:</u> You can add an additional address by inserting a record and then following the same procedures, but with different information. Multiple addresses of a type (e.g., <i>MA</i>) can exist for a person, but only one of the addresses can be active.
5	Create another address for your person with the address type of <i>MA</i> (Mailing). <u>Note:</u> This address and address type will be used in later exercises.
6	Click the Save icon.
7	Click the Exit icon.



Section C: Day-to-Day Operations

Lesson: Making Changes to a Name

◀ Jump to TOC

Introduction

You have learned that your new recruit (Margaret Jane Smith) has gotten married. Her new name is now Margaret Smith Jones. Even though you had entered and saved her maiden name to the system, it is possible to go back and make changes to the name.

Fields

Use the information in the table to complete the procedure that follows.

Fieldname	Description	Value
Key block		
ID	9 character code Identification number associated with the person/non-person in the system Required	[see previous exercise]
	Name area is non-enterable	
Current Identification block		
ID	9 character code Update a current identification number associated with this ID Required	[see previous]
Name Type	30 character free-form text Type of name associated with this ID	FRML Formal
Person Name Information block		
Last Name	60 character name Last name associated with this ID Margaret Smith Jones would enter <i>Jones</i> Required	Jones
First Name	15 character name First name associated with this ID Margaret Jane Smith Jones would enter <i>Margaret</i>	Margaret
Middle Name	15 character name Middle name associated with this ID Margaret Smith Jones would enter <i>Smith</i>	[Your middle name] (Jane)
Prefix	20 character name prefix Name prefix associated with this ID Margaret Smith Jones would enter <i>Mrs.</i>	Mrs.



Section C: Day-to-Day Operations

Lesson: Making Changes to a Name (Continued)

◀ Jump to TOC

Fields, continued

Person Name Information block, continued		
Suffix	20 character name suffix Name suffix associated with this ID Not applicable for this exercise	Blank
Preferred First Name	15 character name Preferred name associated with this ID Use the preferred name corresponding with the last name Margaret Smith Jones would enter <i>Maggie</i>	Maggie

Note: Changing a name in Banner should be addressed in your institution's data standards document.

Procedure

Follow these steps to complete the process. Use the table on the previous page where needed.

Step	Action
1	Access the Identification Form (SPAIDEN).
2	Enter the ID number you generated previously in the ID field.
3	Enter the information in the appropriate fields in the key block, as found in the table.
4	Enter the name information in the appropriate fields in the Current Identification block, as found in the table.
5	Enter the name information in the appropriate fields in the Person Name Information block, as found in the table. <u>Note:</u> Entering information into the Name field is not applicable for this exercise.
6	Click the Save icon.
7	Click the Exit icon.



Section C: Day-to-Day Operations

Lesson: Entering Multiple Telephone Numbers

◀ Jump to TOC

Introduction

Margaret Smith Jones has purchased a fax machine and wants that telephone number added to her record, but she still wants to keep the original one as her regular telephone number. Even though you had entered and saved her telephone number to the system, it is possible to add another one to her record.

The purpose of the General Person Telephone Form (SPATELE) is to allow the user to create an unlimited number of telephone numbers associated with a person. These telephone numbers may be associated with an address type and sequence number.

Note: A phone number must be flagged as primary, with the Primary Indicator checked (set to Y), before it is displayed along with the address information.

Banner form

The screenshot shows the 'General Person Telephone SPATELE 7.0' web form. At the top, there is a header bar with the title. Below the header, the 'ID' field is populated with '777123456' and the name 'Taylor, McKenzie'. A 'Telephone' tab is selected. The form contains three identical sections for entering telephone numbers. Each section includes a 'Telephone Type' dropdown, a 'Telephone' field with a hyphen separator, and three checkboxes: 'Primary', 'Unlisted', and 'Inactivate'. Below these are fields for 'International Access', 'Comment', 'Address Type', 'Sequence', 'Activity Date', and 'User'. The first section is filled with placeholder text, while the other two are empty.



Section C: Day-to-Day Operations

Lesson: Entering Multiple Telephone Numbers (Continued)

◀ Jump to TOC

Fields

Use the information in the table to complete the procedure that follows.

Field	Description	Value
ID	9 character code Identification number associated with the person/non-person in the system Required	[see previous]
Telephone Type	30 character code Type code of the telephone number Required	FAX (Fax)
Telephone	10 character number Telephone number Required	215-5552121
(Extension) <i>unlabeled</i>	Telephone number's extension	Not applicable for this exercise
Primary	Checkbox Is this the primary telephone number if multiple telephone numbers exist for a telephone type?	Unchecked
Unlisted	Checkbox Is this telephone number unlisted?	Unchecked
Inactive	Checkbox Is this telephone number inactive?	Unchecked
International Access	16 character code Specify the International Access code for dialing an international telephone number	Blank



Section C: Day-to-Day Operations

Lesson: Entering Multiple Telephone Numbers (Continued)

◀ Jump to TOC

Fields, continued

Fieldname	Description	Value
Address Type	2 character code Type code for the address	MA (Mailing)
Sequence	2 character number Sequence number associated with the address Required if ID is for a person	2
Date	11 character date The date this record was created System-generated	[today's date]

Procedure

Follow these steps to complete the process. Use the table on the previous and current pages where necessary.

Step	Action
1	Access the Telephone Form (SPATELE).
2	Enter various types of telephone numbers for the ID you generated previously, using the table.
3	Use the address type defined previously to associate a phone number with an address for this person.
4	Click the Save icon.
5	Click the Exit icon.



Section C: Day-to-Day Operations

Lesson: Capturing Biographic Information

◀ Jump to TOC

Introduction

After a person is established in the database, the General Person Form (SPAPERS) is used to enter and maintain biographic information about a person. Types of data captured include gender, date of birth, marital status, legacy information, and whether or not the person is deceased. The confidentiality indicator flag (**Confidential** checkbox) is also set here.

Banner form

General Person SPAPERS 7.3

ID: 777123456 Taylor, McKenzie

Biographical

Gender: Male
 Female
 Not Available

Birth Date: 22-JUN-1988
Age: 17
SSN/SIN/TIN:

Confidential
 Deceased
Deceased Date:

Citizenship: Y Citizen
Marital Status: S Single
Religion:
Legacy:
Ethnicity: 6 Other
New Ethnicity: Hispanic or Latino
 Ethnicity and Race Confirmed
Confirmed Date: 23-MAY-2006

Veteran File Number:
Veteran Category: None
Active Duty Separation Date:
 Special Disabled Veteran

Last Update
User: SAISUSR
Activity Date: 23-MAY-2006

Race	User	Activity Date



Section C: Day-to-Day Operations

Lesson: Capturing Biographic Information (Continued)

◀ Jump to TOC

Fields

Use the information in the table to complete the procedure that follows.

Fieldname	Description	Value
ID	9 character code Identification number associated with the person/non-person in the system Required	[see previous]
Gender	Radio button Gender of the person Default: Not Available Required	Female (for Margaret)
Birth Date	11 character date Birth date of the person	01-JAN-1984
Age	3 character number Age of the person System-calculated	19
SSN/SIN/TIN	9 character number Social Security Number, Social Insurance Number, or Tax File number of the person	012345678
Confidential	Checkbox Is this person's record confidential?	Unchecked
Deceased	Checkbox Is this person deceased?	Unchecked
Deceased Date	Date format DD-MM-YYYY Date the person died Required if Deceased checkbox is checked	Leave blank
Citizenship	30 character code Citizenship Type code of the person	Y (Citizen)
Marital Status	30 character code Marital Status Type code of the person	M (Married)
Religion	30 character code Religion Type code of the person	OT (Other)
Legacy	30 character code Relative who attended the same organization	M (Mother)



Section C: Day-to-Day Operations

Lesson: Capturing Biographic Information (Continued)

◀ Jump to TOC

Fields

Use the information in the table to complete the procedure that follows.

Fieldname	Description	Value
Ethnicity	30 character code Ethnicity Type code of the person	1 (Caucasian)
New Ethnicity	Drop-down Hispanic or Latino, Not Hispanic or Latino, or None	None
Ethnicity and Race Confirmed	Checkbox	Unchecked
Confirmed Date	Date format DD-MM-YYYY	Blank
Veteran File Number	10 character number Veteran Identification number associated with the person	Blank
Veteran Category	Pull-down list Designates if the person was a veteran during the Vietnam war era	None
Active Duty Separation Date	Date format DD-MM-YYYY	Blank

Exercise

You have received biographic information for Margaret Jane Smith that must be entered into the system.

Procedure

Follow these steps to complete the process. Use the table on the previous and current page where indicated.

Step	Action
1	Access the General Person Form (SPAPERS).
2	Enter biographic information for the ID you generated previously, using the table on the previous and current pages.
3	Click the Save icon.
4	Click the Exit icon.



Section C: Day-to-Day Operations

Lesson: Entering Comments

◀ Jump to TOC

Introduction

You have received even more information regarding Margaret Jane Smith that must be entered into the system.

The Person Comment Form (SPACMNT) is used to enter comment information on the person.

Comment information includes

- a comment type
- an originator
- a confidentiality indicator
- an add date.

Banner form

Person Comment SPACMNT 7.2.1.1

ID: 777123456 Taylor, McKenzie

Comment Type:

Originator:

Contact:

Contact Date:

Appointments

From Time:

To Time:

Confidentiality

Add Date:

Activity Date:

Last Updated by:

Comments:

Narrative Comments:



Section C: Day-to-Day Operations

Lesson: Entering Comments (Continued)

◀ Jump to TOC

Exercise

Margaret has requested information about the various Sororities at your organization. On which form would you enter in a comment regarding her request? Which fields must you complete on that form and with what information?

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Comment Form (SPACMNT).
2	Enter Margaret's ID number in the ID field.
3	Enter <i>107</i> (Sorority) in the Comment Type field.
4	Select an originator code representing the office you are representing in the Originator field. <u>Note:</u> In this case, enter <i>ADMS</i> (Admissions Office).
5	Enter any comments you would like to have attached to this record in the Comments field.
6	Check the Confidentiality checkbox if this comment is confidential.
7	Click the Save icon.
8	Click the Exit icon. <u>Note:</u> There is a Narrative Comments field for long narrative comments on the person if you wish to use it.



Section C: Day-to-Day Operations

Lesson: Entering Medical Information

◀ Jump to TOC

Introduction

The Medical Information Form (GOAMEDI) is used to view and update medical information and medical comments for persons at your institution, including students, faculty, and staff.

Banner form

General Medical Information GOAMEDI 7.3

ID: 777123456 ▼ McKenzie Taylor

Medical Code: HC ▼ Heart Condition

Medical Date:

Disability Type: ▼

Disability Onset Age: Primary Disability?

Equipment Code: ▼

Disability Service: ▼

Comment:

User ID: Activity Date: 25-MAY-2006



Section C: Day-to-Day Operations

Lesson: Entering Medical Information (Continued)

◀ Jump to TOC

Exercise

Margaret suffers from diabetes and must receive insulin shots on a daily basis. In this exercise, you will enter this information on the Medical Information Form (GOAMEDI) so that the necessary offices will know about her condition.

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Medical Information Form (GOAMEDI).
2	Enter the ID number if it is not already there in the ID field.
3	Perform a Next Block function.
4	Enter <i>DI</i> (Diabetic Insulin User) in the Medical Code field. <u>Note:</u> No other fields are required on this form, and there are no other fields that necessarily pertain to Margaret's condition.
5	Click the Save icon.
6	Click the Exit icon.



Section C: Day-to-Day Operations

Lesson: Entering Emergency Contact Information

◀ Jump to TOC

Introduction

The Emergency Contact Form (SPAEMRG) is used to capture emergency contact information for persons.

The information you can enter here includes

- contact name
- relationship to the person with the emergency, and
- address and phone information for the person to be contacted.

Banner form

Emergency Contact SPAEMRG 7.0

ID: 777123456 Taylor, McKenzie

Emergency Contact

Priority: 1

Contact Last Name: Mann **First Name:** Elanor **Middle Initial:**

Relationship: M Mother

Address Type: PR Permanent

Street Line 1: 123 West Way
Street Line 2:
Street Line 3:

City: Malvern

State or Province: PA Pennsylvania

ZIP or Postal Code: 19355

Nation:

Telephone: 610 - 5555555

Last Update

User:

Activity Date:



Section C: Day-to-Day Operations

Lesson: Entering Emergency Contact Information (Continued)

◀ Jump to TOC

Exercise

In case Margaret would experience diabetic shock, she would like the organization to contact her husband. In this exercise, you will enter information on the Emergency Contact Form (SPAEMRG) so that he would be contacted in any medical or other type of emergency.

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Emergency Contact Form (SPAEMRG).
2	Enter the ID number in the ID field, if necessary.
3	Enter <i>1</i> in the Priority field (required), indicating the person being entered on this form should be contacted first in an emergency. <u>Note:</u> A person can have multiple emergency contacts on this form.
4	Enter the name of the person's spouse in the Contact Last Name and First Name fields.
5	Enter <i>P</i> (Spouse) in the Relationship field,
6	Continue through the form, entering the address and phone number information in the respective fields.
7	Click the Save icon.
8	Click the Exit icon. <u>Note:</u> If your institution allows this information to display on the web, students will be able to update their own emergency contact information via the internet.



Section C: Day-to-Day Operations

Lesson: Adding or Updating Appointments and Contacts

◀ Jump to TOC

Introduction

The Person Appointments/Contacts Form (SOAAPPT) is used to add or update appointments and contacts for a person. A person is not required to have a recruiting or admissions record.

Banner form

Person Appointments/Contacts SOAAPPT 7.3

ID: 777123456 Taylor, McKenzie Appointment Range Start Date: End Date:

Appointments

Appointment Date:	25-MAY-2006	From Time:	To Time:	Contact:	
Interviewer:				Recruiter:	
Source Code:				Interview Result:	

Appointment Date:		From Time:	To Time:	Contact:	
Interviewer:				Recruiter:	
Source Code:				Interview Result:	

Contacts

Contact Type	Contact Date
CMP Campus Visit	23-MAY-2006 08:46:25 AM



Section C: Day-to-Day Operations

Lesson: Adding or Updating Appointments and Contacts (Continued)

◀ Jump to TOC

Exercise

Margaret would like to set up an appointment to come in and speak with one of the recruiters in your office. It is your responsibility to set this up. When you spoke with her on the phone, she could only come in during the summer.

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Person Appointment/Contacts Form (SOAAPPT).
2	Enter the ID number in the ID field, if it is not already there.
3	Enter a start date of <i>June 21</i> and an end date of <i>September 1</i> in the Appointment Range Start Date and End Date fields. <u>Example:</u> June 21, 2003 would be entered as 21-JUN-2003.
4	Perform a Next Block function.
5	Select a date within the selected appointment date range in the Appointment Date field.
6	Enter times in the From Time and To Time fields for the appointment. <u>Note:</u> Time is entered using four digits based on the 24-hour clock. <u>Example:</u> From 1300 to 1400 is 1:00 PM to 2:00 PM.
7	Click the down arrow next to the Contact field to view valid contact codes. Select <i>PHN</i> (Phone Call).
8	Leave the Interviewer field empty.
9	Enter the scheduled appointment recruiter code for the recruiter who has contacted Margaret in the Recruiter field. <u>Note:</u> Click the down arrow next to this field to view valid codes.
10	Click the Save icon.
11	Click the Exit icon.



Section C: Day-to-Day Operations

Lesson: Assigning and Releasing Holds

◀ Jump to TOC

Introduction

The Hold Information Form (SOAHOLD) is used to assign holds to a person or entity.

Banner form

Hold Information SOAHOLD 7.3

Confidential

ID: 210009208 Rose Ranson

Hold Details

Hold Type: AA Administrative Action Hold Reason: Release Indicator: WGALE

Amount: From: 10-MAY-2006 To: 31-DEC-2099 Origination Code:

Hold Type: AP Application Hold Reason: Release Indicator: WGALE

Amount: From: 10-MAY-2003 To: 31-DEC-2099 Origination Code:

Exercise 1

You have not received a completed application for admissions from Margaret. At this time, no office can process any additional information regarding Margaret. You must place a general hold on her record.

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Hold Information Form (SOAHOLD).
2	Enter Margaret's ID number if in the ID field, if necessary.
3	Enter <i>RH</i> (Registrar's Hold) in the Hold Type field. <u>Note:</u> If you check the Release checkbox only YOU will be able to release the hold.
4	Enter <i>Incomplete Application</i> in the Reason field. <u>Note:</u> If a reason is entered, it will display on the web.
5	Enter the dollar amount associated with the hold in the Amount field.



Section C: Day-to-Day Operations

Lesson: Assigning and Releasing Holds (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action
6	Today's date should appear in the From field. <u>Note:</u> The system date will default. Holds can also be placed to take effect at a future date.
7	The To field will default to 12/31/2099. <u>Note:</u> This date can be changed accordingly.
8	Enter <i>ADMS</i> (Admissions Office) in the Originator field. This is optional.
9	Click the Save icon.
10	Click the Exit icon.

Exercise 2

For the purposes of this exercise, assume that Margaret has subsequently completed her application and submitted it to the proper office; and that you were the person who initiated the hold.

Procedure

Follow these steps to complete the process.

Step	Action
1	Select the Release Indicator checkbox so the person that entered the hold can release the hold.
2	The person who placed the hold clicks in a field of the record to be released and performs a Record Remove function. <u>Note:</u> Your institution can maintain a historical record of holds by entering the release date in the To field. The hold remains for viewing, but no longer affects processing.
3	Click the Save icon.
4	Click the Exit icon.



Section C: Day-to-Day Operations

Lesson: Person Directory Report

◀ Jump to TOC

Introduction

The Person Directory Report (SPRPDIR) is used to produce a list of persons, addresses, and primary phone numbers in the system by type of person.

Banner report

Process Submission Controls GJAPCTL 7.3

Process: SPRPDIR Person Directory Parameter Set:

Printer Control

Printer: Special Print: Lines: 60 Submit Time:

Parameter Values

Number	Parameters	Values
01	Term	d
02	Person Type List	
03	Confidential Person Print Ind	N
04	Address Selection Date	25-MAY-2006
05	Address Hierarchy	1MA
06	Print ID	Y
07	Faculty Type	
08	Selection Identifier	

LENGTH: 6 TYPE: Character O/R: Required M/S: Single
Report Term.

Submission

Save Parameter Set as Name: Description: Hold Submit



Section C: Day-to-Day Operations

Lesson: Self Check

◀ Jump to TOC

Directions

Use the information you have learned in this workbook to complete this self check activity.

Question 1

If a Last name query is performed using *a%*, which name would **not** be returned?

- a) Andrews
- b) Arnolds
- c) Anders

Question 2

Before a person can become a recruit, applicant, student, or instructor or have an account, the person must first be identified to the Banner system with a name and an identification number.

True / False

Question 3

What fields are required in the Information block of SPAIDEN to generate an ID number for a person?

Question 4

A person may have multiple addresses types assigned to him or her.

True / False

Question 5

What field (SPAIDEN) identifies how the information was created or updated?

Question 6

If a person has changed his or her name since first being entered to the system, how do you access his or her original name?



Section C: Day-to-Day Operations

Lesson: Self Check (Continued)

◀ [Jump to TOC](#)

Question 7

If a person has multiple telephone numbers associated with him or her, how is one identified as the primary number?

Question 8

The General Person Form (SPAPERS) captures biographical information such as gender, date of birth, marital status, legacy information, and whether or not a person is deceased.

True / False

Question 9

The Comment Form (SPACMNT) allows free form text to be entered and assigned to an ID.

True / False

Question 10

On what form would you identify a person as visually impaired and requiring the use of a Seeing Eye dog?

Question 11

Numerous emergency contacts can be identified and prioritized to a person on the Emergency Contact Form (SPAEMRG).

True / False

Question 12

What form is used to set up a meeting time to a person?

Question 13

What form is used to place and release a hold on a record?



Section C: Day-to-Day Operations

Lesson: Answer Key for Self Check

◀ Jump to TOC

Question 1

If a Last name query is performed using *a%*, which name would **not** be returned?

b. Arnolds

Question 2

Before a person can become a recruit, applicant, student, or instructor or have an account, the person must first be identified to the Banner system with a name and an identification number.

True

Question 3

What fields are required in the Information Block to generate an ID number for a person?

The First Name and Last Name fields are required in order to generate an ID number for a person.

Question 4

A person may have multiple addresses types assigned to him or her.

True

Question 5

What field identifies how the information was created or updated?

The Source field identifies how the information was created or updated, such as by telephone call or World Wide Web.

Question 6

If a person has changed his or her name since first being entered to the system, how do you access his or her original name?

To access the name in which a person was originally identified to the system as, select Alternate Names/ID from the Options menu of the Identification Form (SPAIDEN). The Alternate Identification window should display with the person's original last name.



Section C: Day-to-Day Operations

Lesson: Answer Key for Self Check (Continued)

◀ Jump to TOC

Question 7

If a person has multiple telephone numbers associated with him or her, how is one identified as the primary number?

Check the Primary checkbox on the Telephone Form (SPATELE) to identify the primary phone number of a person.

Question 8

The General Person Form (SPAPERS) captures biographical information such as gender, date of birth, marital status, legacy information, and whether or not a person is deceased.

True

Question 9

The Comment Form (SPACMNT) allows free form text to be entered and assigned to an ID.

True

Question 10

On what form would you identify a person as visually impaired and requiring the use of a Seeing Eye dog?

Medical and disability information is entered on the Medical Form (GOAMEDI).

Question 11

Numerous emergency contacts can be identified and prioritized to a person on the Emergency Contact Form (SPAEMRG).

True. Numerous emergency contacts can be identified on the Emergency Contact Form (SPAEMRG). Entering a value (1-9) in the Priority field for each record can prioritize each contact.

Question 12

What form is used to set up a meeting time for a person?

The Appointment/Contact Form (SOAAPPT)



Section C: Day-to-Day Operations

Lesson: Answer Key for Self Check (Continued)

◀ [Jump to TOC](#)

Question 13

What form is used to place and release a hold on a record?

The Hold Information Form (SOAHOLD)



Section C: Day-to-Day Operations

Lesson: Summary

◀ [Jump to TOC](#)

Let's review

As a result of completing this workbook, you have

- defined a person and/or non-person to General Person
- maintained supporting General Person information
- produced General Person reports.

Next step

Review the Tape Load Processing and Support Services workbooks, if appropriate.



Section D: Reference

Lesson: Overview

◀ [Jump to TOC](#)

Introduction

The purpose of this section is to provide reference materials related to the workbook.

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Section D: Reference

Lesson: Setup Forms and Where Used

◀ Jump to TOC

Guide

Use this table as a guide to the setup forms and the day-to-day forms that use them.

Setup Form		Day-to-Day Form(s)	
Form Name	Code	Form Name	Code
Recruiter Code Validation	STVRECR	Person Appointments/Contacts	SOAAPPT
Appointment Result Code Validation	STVRSLT	Person Appointments/Contacts	SOAAPPT
Comment Type Code Validation	STVCMTT	Person Comment	SPACMNT
Originator Code Validation	STVORIG	Originator Validation	STVORIG
Contact Type Code Validation	STVCTYP	Contact Code Validation	STVCTYP
Relation Code Validation	STVRELT	Emergency Contact	SPAEMRG
Medical Code Validation	STVMEDI	Medical Information	GOAMEDI
Disability Type Code Validation	STVDISA	Medical Information	GOAMEDI
Medical Equipment Code Validation	STVMDEQ	Medical Information	GOAMEDI
Disability Service Code Validation	STVSPSR	Medical Information	GOAMEDI
Name Type Validation	GTVNNTYP	Identification Form	SPAIDEN
State/Province Code Validation	STVSTAT	Emergency Contact General Person Identification	SPAEMRG SPAIDEN
Address Type Code Validation	STVATYP	General Person Identification	SPAIDEN
Zip Postal Code Validation	GTVZIPC	Emergency Contact General Person Identification	SPAEMRG SPAIDEN
County Code Validation	STVCNTY	General Person Identification	SPAIDEN
Nation Code Validation	STVNATN	Emergency Contact General Person Identification	SPAEMRG SPAIDEN
Telephone Type Validation	STVTELE	General Person Identification	SPAIDEN
Address Source Validation	STVASRC	General Person Identification	SPAIDEN
E-Mail Address Type Validation	GTVEMAL	General Person Identification	SPAIDEN
EDI/ISO Standard Code Validation	GTVSCOD	Nation Code Validation General Person Identification	STVNATN SPAIDEN
Language Code Validation	STVLANG	International Information	GOAINTL



Section D: Reference

Lesson: Setup Forms and Where Used (Continued)

◀ Jump to TOC

Setup Forms, continued

Setup Form		Day-to-Day Form(s)	
Form Name	Code	Form Name	Code
Port of Entry Validation	STVPENT	International Information	GOAINTL
Visa Type Code Validation	STVVVYP	International Information	GOAINTL
International Student Sponsor Code Validation	STVSPON	International Information	GOAINTL
Employment Validation	STVEMPT	International Information	GOAINTL
Citizen Type Code Validation	STVCITZ	General Person Identification General Person	SPAIDEN SPAPERS
Ethnic Code Validation	STVETHN	General Person Identification General Person	SPAIDEN SPAPERS
Marital Status Code Validation	STVMRTL	General Person Identification General Person	SPAIDEN SPAPERS
Religion Code Validation	STVRELG	General Person Identification General Person	SPAIDEN SPAPERS
Legacy Code Validation	STVLGCY	General Person Identification General Person	SPAIDEN SPAPERS
IPEDS Ethnic Code Validation	STVETCT	Ethnic Code Validation General Person Identification	STVETHN SPAIDEN



Section D: Reference

Lesson: Day-to-Day Forms and Setup Needed

◀ Jump to TOC

Guide

Use this table as a guide to the day-to-day forms and the setup forms needed for each.

Day-to-Day Form	Setup Forms Needed
General Person Identification (SPAIDEN)	<ul style="list-style-type: none"> • Name Type Validation (GTVNTYP) • Address Type Code Validation (STVATYP) • Telephone Type Validation (STVTELE) • State/Province Code Validation (STVSTAT) • Zip/Postal Code Validation (GTVZIPC) • County Code Validation (STVCNTY) • Nation Code Validation (STVNATN) • Address Source Validation (STVASRC) • Citizen Type Code Validation (STVCITZ) • Ethnic Code Validation (STVETHN) • Marital Status Code Validation (STVMRTL) • Religion Code Validation (STVRELG) • Legacy Code Validation (STVLGCY) • E-mail Address Type Validation (GTVEMAL) • Relation Code Validation (STVRELT)
General Person Telephone (SPATELE)	<ul style="list-style-type: none"> • Telephone Type Validation (STVTELE)
General Person (SPAPERS)	<ul style="list-style-type: none"> • Citizen Type Validation (STVCITZ) • Ethnic Code Validation (STVETHN) • Marital Status Validation (STVMRTL) • Religion Code Validation (STVRELG) • Legacy Code Validation (STVLGCY)
Person Comment (SPACMNT)	<ul style="list-style-type: none"> • Comment Type Validation (STVCMTT) • Originator Validation (STVORIG) • Contact Code Validation (STVCTYP)
Medical Information (GOAMEDI)	<ul style="list-style-type: none"> • Medical Code Validation (STVMEDI) • Disability Type Validation (STVDISA) • Medical Equipment Code Validation (STVMDEQ) • Disability Service Validation (STVSPSR)



Section D: Reference

Lesson: Day-to-Day Forms and Setup Needed (Continued)

◀ Jump to TOC

Forms, continued

Day-to-Day Form	Setup Forms Needed
Emergency Contact (SPAEMRG)	<ul style="list-style-type: none">• Relationship Validation (STVRELT)• Address Type Validation (STVATYP)• State/Province Code Validation (STVSTAT)• Zip/Postal Code Validation (GTVZIPC)• Nation Validation (STVNATN)
Person Appointments/Contacts (SOAAPPT)	<ul style="list-style-type: none">• Recruiter Identification Validation (STVRECR)• Appointment Result Validation (STVRSLT)• Contact Code Validation (STVCTYP)
Hold Information (SOAHOLD)	<ul style="list-style-type: none">• Person Hold Type Validation (STVHLDD)• Originator Validation (STVORIG)



Section D: Reference

Lesson: Forms Job Aid

◀ Jump to TOC

Guide

Use this table as a guide to the forms used in this workbook. The Owner column may be used as a way to designate the individual(s) responsible for maintaining a form.

Form Name	Form Description	Owner
STVRECR	Recruiter Code Validation	
STVRSLT	Appointment Result Code Validation	
STVCMTT	Comment Type Code Validation	
STVORIG	Originator Code Validation	
STVCTYP	Contact Type Code Validation	
STVRELT	Relation Code Validation	
STVMEDI	Medical Code Validation	
STVDISA	Disability Type Code Validation	
STVMDEQ	Medical Equipment Code Validation	
STVSPSR	Disability Service Code Validation	
GTVNTYP	Name Type Validation	
STVSTAT	State/Province Code Validation	
STVATYP	Address Type Code Validation	
GTVZIPC	Zip Postal Code Validation	
STVCNTY	County Code Validation	
STVNATN	Nation Code Validation	
STVTELE	Telephone Type Validation	
STVASRC	Address Source Validation	
GTVEMAL	E-Mail Address Type Validation	
GTVSCOD	EDI/ISO Standard Code Validation	
STVLANG	Language Code Validation	
STVPENT	Port of Entry Validation	
STVVVYP	Visa Type Code Validation	
STVSPON	International Student Sponsor Code Validation	
STVEMPT	Employment Validation	
STVCITZ	Citizen Type Code Validation	
STVETHN	Ethnic Code Validation	
STVMRTL	Marital Status Code Validation	
STVRELG	Religion Code Validation	
STVLGCY	Legacy Code Validation	



Section D: Reference

Lesson: Forms Job Aid (Continued)

◀ Jump to TOC

Procedure, continued

Form Name	Form Description	Owner
STVETCT	IPEDS Ethnic Code Validation	
Day-to-Day Forms		
SPAIDEN	General Person Identification	
SPATELE	General Person Telephone	
SPAPERS	General Person	
SPACMNT	Person Comment	
GOAMEDI	Medical Information	
SPAEMRG	Emergency Contact	
SOAAPPT	Person Appointments/Contacts	
SOAHOLD	Hold Information	
SPRPDIR	Person Directory Report	
STVETCT	IPEDS Ethnic Code Validation	



Release Date

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This workbook was last updated on 5/25/2006.