

# Banner Student General Person Training Workbook

*Release 8.0 - April 2008*  
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**Revision History Log**

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April 2008	New version that supports 8.0 software.

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Think before you print.

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# Introduction



## Course goal

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

- Introduction
- Set Up
- Day-to-Day Operations

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

## Course objectives

In this course you will learn how to

- create the rules needed for creating and maintaining biographic and demographic person data
- set parameters needed for creating and maintaining biographic and demographic person data.
- define a person and/or non-person to the General Person module
- maintain supporting General Person information
- produce General Person reports.

## Intended audience

The staff of the Admissions Office, Recruitment Office and Registrar's Office, as well as selected personnel who maintain biographic and demographic data for prospects, applicants, students and faculty or advisors.

## Prerequisites

To complete this course, you should have

- completed the Education Practices computer-based training (CBT) tutorial *Banner 8 Fundamentals*, or have equivalent experience navigating in the Banner system
- completed the Student Overview training workbook
- administrative rights to create the associated rules and set the appropriate validation codes in Banner.

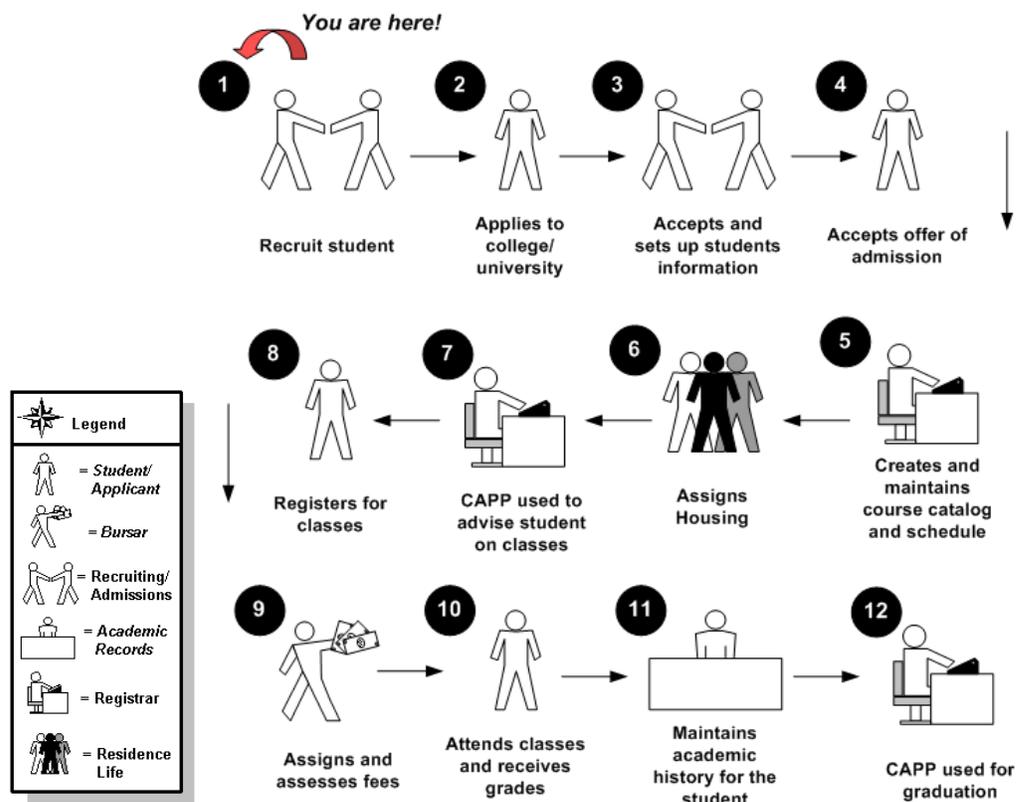
# Process Introduction

## About the process

The staffs of the Admissions, Recruitment, and Registrar's Offices, 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.

## 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 institution. 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.

# Set Up



## Section goal

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

## Objectives

In this section you will learn how to

- create the rules needed for creating and maintaining biographic and demographic student data
- set parameters needed for creating and maintaining biographic and demographic student data.

# Validation Forms Used in the General Person Module

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## Validation forms needed

The validation forms found in the Job Aid in the Appendix of this workbook 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.

<b>Form Description</b>	<b>Banner Name</b>
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

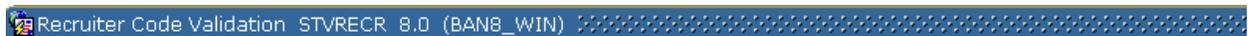
<b>Form Description</b>	<b>Banner Name</b>
Address Type Code Validation	STVATYP
Zip Postal Code Validation	GTVZIPC
County Code Validation	STVCNTY
Nation Code Validation	STVNATN
Telephone Type Validation	STVTELE
Address Source Validation	STVASRC
E-Mail Address Type Validation	GTVEMAL
EDI/ISO Standard Code Validation	GTVSCOD
Language Code Validation	STVLANG
Port of Entry Validation	STVPENT
Visa Type Code Validation	STVVVYP
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

# Recruiter Code Validation (STVRECR)

## Introduction

Use the Recruiter Code Validation Form to create, update, insert, and delete recruiter names or 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
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
		<input type="checkbox"/>	

# Appointment Result Code Validation (STVRSLT)

## 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 for Interview. The Prospect Information Form (SRARECR) and the Person Appointments/Contacts Form (SOAAPPT) use this form to validate the recruiting or admissions appointment result codes. You can only create and update these codes from this form.

## Banner form

Appointment Result Code Validation STVRSLT 8.0 (BAN8\_WIN)

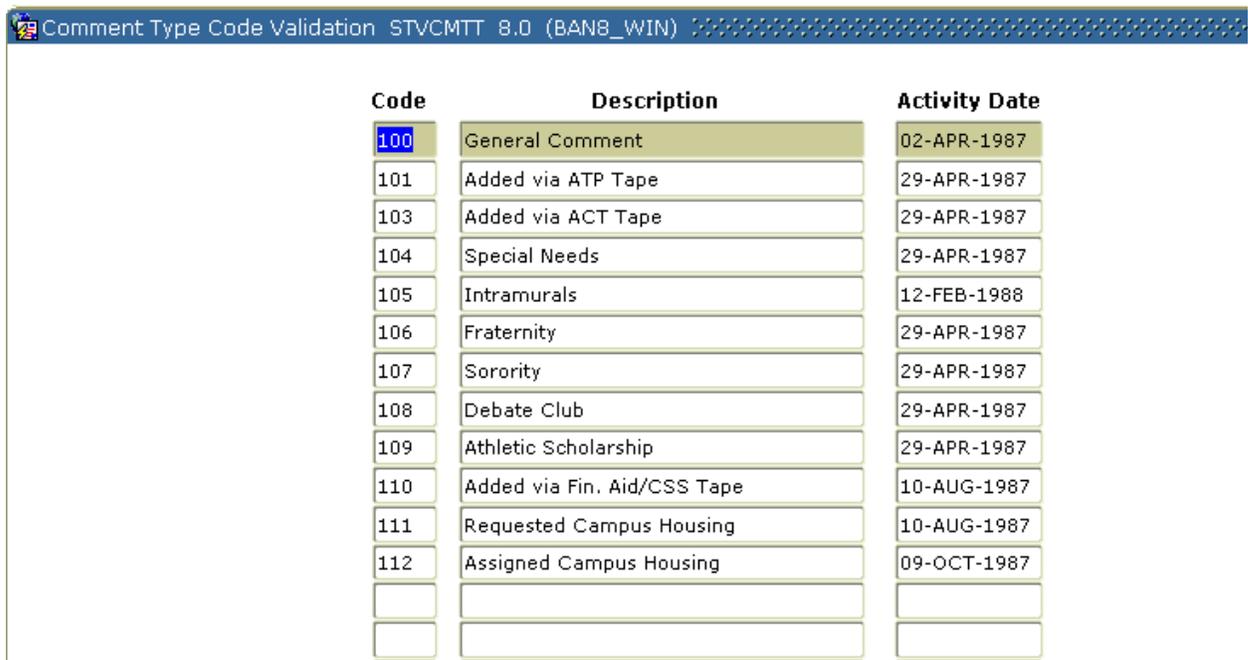
Code	Description	Generate Contact	Activity Date
ATTN	Attended	<input checked="" type="checkbox"/>	06-JAN-1995
LATE	Late	<input type="checkbox"/>	06-JAN-1995
NOSH	Did Not Attend	<input type="checkbox"/>	06-JAN-1995
		<input type="checkbox"/>	

# Comment Type Code Validation (STVCMTT)

## 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

# Originator Code Validation (STVORIG)

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## 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.

## Banner form

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
AUTO	Generated Automatically	31-MAR-1988
BUSO	Bursar's Office	09-OCT-1987
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
FAID	Financial Aid Office	01-NOV-1989
FINO	Finance and Billing	03-MAR-1992
LIBR	Library Circulation Area	12-MAR-1987
LOAN	Student Loans Office	23-MAY-2007
MAJG	Major Gifts Office	03-JUN-1990
MATH	Department of Mathematics	12-MAR-1987
PHY1	Physical Education - Football	12-MAR-1987
PHY2	Physical Education - Baseball	12-MAR-1987
PLAN	Planned Giving Office	03-JUN-1990
RECR	Recruiting Center	01-MAY-1987
REGS	Registration Office	26-MAR-1987

# Contact Type Validation (STVCTYP)

## Introduction

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

## Banner form



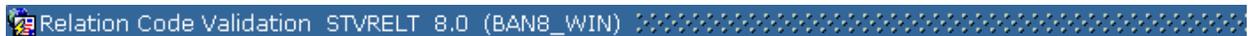
Code	Description	Activity Date
CMP	Campus Visit	05-JAN-1988
CNN	College Night	07-APR-1987
CNS	Counselor Visit	25-MAR-1987
DLL	Dean's List Letter	29-APR-1987
FIN	Financial Aid Tape	04-FEB-1995
FUL	Follow-up Letter	29-APR-1987
HLL	Honors List Letter	29-JAN-1991
IN1	Interview One	13-APR-1987
IN2	Interview Two	03-JAN-1995
INP	In-person	25-MAR-1987
MIL	Military Interest Letter	03-JAN-1995
MLL	Merit List Letter	29-APR-1987
OTH	Other	25-MAY-2006
PGL	Univ Pres Greeting Letter	22-MAY-1987
PHN	Phone Call	25-MAR-1987
TAP	Test Score Tape	09-OCT-1987

# Relation Code Validation (STVRELT)

## 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
<b>A</b>	An Ex-spouse	01	11-SEP-2002
B	Brother	02	27-MAR-2007
C	Child	02	09-JAN-2004
F	Father	01	09-JAN-2004
G	Grandparent		24-JUN-1991
M	Mother	01	26-MAR-2007
N	Neighbor		15-JUL-1993
O	Relative		09-JAN-2004
P	Spouse	01	07-MAY-2003
R	Friend		15-JUL-1993
S	Sister		09-JAN-2004
U	Guardian		01-MAY-1987
X	Significant Other		09-AUG-1991

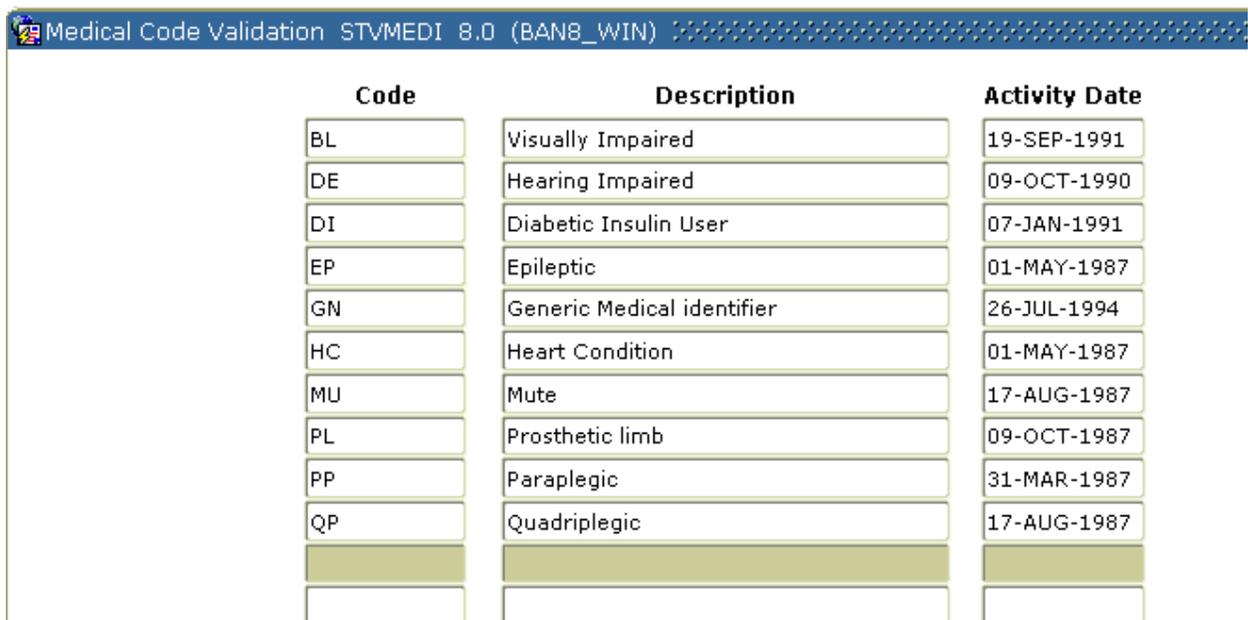
# Medical Code Validation (STVMEDI)

## 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

# Disability Type Code Validation (STVDISA)

## 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

# Medical Equipment Code Validation (STVMDEQ)

## 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

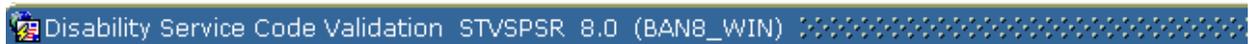
# Disability Service Code Validation (STVSPSR)

## 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



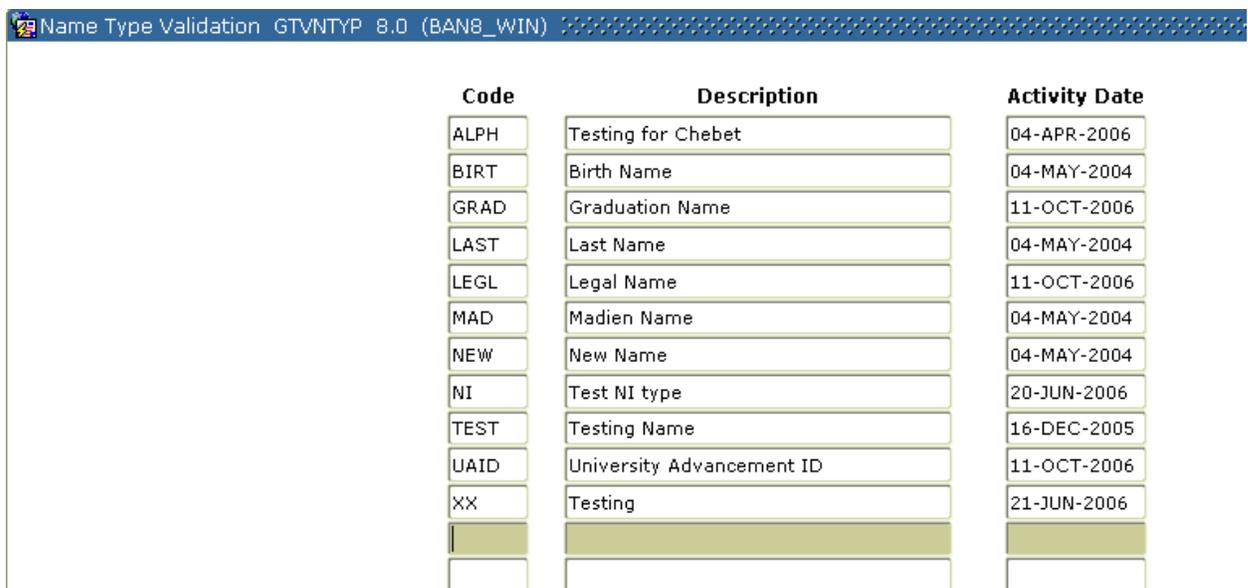
Code	Description	Activity Date
CS	County Para-transit Service	04-SEP-1991
DR	Department of Rehabilitation	07-NOV-1991
DS	Disabled Student Services	04-SEP-1991
HA	Hearing aid required	16-AUG-1991

# Name Type Validation (GTVNTYP)

## 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



Code	Description	Activity Date
ALPH	Testing for Chebet	04-APR-2006
BIRT	Birth Name	04-MAY-2004
GRAD	Graduation Name	11-OCT-2006
LAST	Last Name	04-MAY-2004
LEGL	Legal Name	11-OCT-2006
MAD	Madien Name	04-MAY-2004
NEW	New Name	04-MAY-2004
NI	Test NI type	20-JUN-2006
TEST	Testing Name	16-DEC-2005
UAID	University Advancement ID	11-OCT-2006
XX	Testing	21-JUN-2006

# State/Province Code Validation (STVSTAT)

## 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. This form also allows for the cross referencing of Banner codes to EDI, IPEDS and Statistics Canada codes.

## Banner form

State/Province Code Validation STVSTAT 8.0 (BAN8\_WIN)

Code	Description	EDI Equivalent	IPEDS State Code	Canadian Statistics Code	Activity Date
123	Testing				15-OCT-2002
AA	Military - Americas				08-DEC-1995
AB	Alberta				25-JUL-1991
ACT	Australian Capitol Territory				26-JUL-1994
AE	Military - Europe				08-DEC-1995
AK	Alaska				09-OCT-1987
AL	Alabama				18-AUG-1987
AP	Military - Pacific				08-DEC-1995
AR	Arkansas				18-AUG-1987
AS	American Samoa				18-AUG-1987
AZ	Arizona				18-AUG-1987
BC	British Columbia				25-JUL-1991
CA	California				05-MAY-1987
CM	Northern Mariana Islands				18-AUG-1987
CO	Colorado	CO			29-APR-2003
CT	Connecticut				18-AUG-1987
CZ	Canal Zone				18-AUG-1987
DC	District of Columbia				05-MAY-1987
DE	Delaware				05-MAY-1987
FL	Florida				06-MAY-1987
FR	Foreign State				26-OCT-2005

# Address Type Code Validation (STVATYP)

## 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
BI	Billing	BI	Billing	<input checked="" type="checkbox"/>	03-MAY-1991
BU	Business	BU	Business or work	<input checked="" type="checkbox"/>	03-MAY-1991
CU	testing client address			<input type="checkbox"/>	10-OCT-2005
EM	Emergency Contact	EMER	Emergency Contact	<input type="checkbox"/>	30-MAR-1995
FA	Firm Address	FA	Firm Address	<input type="checkbox"/>	01-AUG-1991
HO	Home address			<input type="checkbox"/>	08-DEC-2005
HQ	Corporate Headquarters	HQ	Corporate Headquarters	<input type="checkbox"/>	03-JUN-1990
IM	Testing client Address Type			<input type="checkbox"/>	19-MAY-2004
MA	Mailing	MA	Mailing	<input checked="" type="checkbox"/>	03-MAY-1991
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"/>	03-MAY-1991
PR	Permanent	PR	Permanent	<input type="checkbox"/>	29-APR-1987
RH	Residence Hall	RH	Residence Hall	<input type="checkbox"/>	06-APR-1995
SB	Corporate Subsidiary	SB	Corporate Subsidiary	<input type="checkbox"/>	03-JUN-1990
SC	School Campus	SC	School Campus	<input type="checkbox"/>	07-JAN-1991
SE	Seasonal	SE	Seasonal	<input type="checkbox"/>	06-FEB-1995
TE	Temporary	TE	Temporary	<input type="checkbox"/>	03-JAN-1995
X1	mtytler test	MA	Mailing	<input type="checkbox"/>	19-DEC-2006

# Zip Postal Code Validation (GTVZIPC)

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## 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)
- applicants on the Quick Entry Form (SAAQUIK)
- donors on the Gift Form (AGAGIFT).
- vendors on the Vendor Form (FTMVEND).
- person records on the various IDEN forms (SPAIDEN, PPAIDEN, APAIDEN, FOAIDEN, ROAIDEN)
- colleges, high schools, sources on the Source or Background Institution Address form (SOASBGI)
- issued to address for transcripts or enrollment verifications on the Transcript Request form (SHARQTC) or Enrollment Verification Request form (SFARQST)
- ship to address for a diploma on the Diploma form (SHADIPL)
- for employer address and exchange/visitor activity site data on the SEVIS Information form (GOASEVS)
- for person address information on the Common Matching Entry form (GOAMTCH)
- for employer addresses on the Employer Code Validation form (STVEMPL)

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. This form also allows you match a ZIP/postal code to a County code (STVCNTY) and Nation code (STVNATN), if desired.

# Banner form

ZIP/Postal Code Validation GTVZIPC 8.0 (BAN8_WIN)					
ZIP or Postal Code	City	County	State or Province	Nation	Activity Date
		▼	▼	▼	
0060311111	Aguadilla		123		29-APR-2003
00802	Saint Thomas		VI		11-JAN-1995
00983	Carolina		PR		11-JAN-1995
01040	Amherst		MA		09-APR-2003
01040	Andersen		MA		09-APR-2003
01040	Holyoke		MA		11-JAN-1995
01040	Mt.View		MA		27-FEB-2003
01040	New Town		MA		09-APR-2003
01040	Sabre		MA		09-APR-2003
01063	Northampton		MA		11-JAN-1995
01247	North Adams		MA		11-JAN-1995
01301	Greenfield		MA		11-JAN-1995
01440	Gardner		MA	157	31-JUL-2007
01610	Worcester		MA		11-JAN-1995
01923	Danvers		MA		11-JAN-1995
02116	Boston		MA		07-JAN-1995
02138	Cambridge		MA		11-JAN-1995
02139	Cambridge		MA		11-JAN-1995
02154	Waltham		MA		07-JAN-1995
02180	Stoneham		MA		07-JAN-1995
02181	TEST		NY		30-OCT-2002
02181	Wellesley		MA		11-JAN-1995

# County Code Validation (STVCNTY)

---

## 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. If county codes are to be used, and multiples exist for different states/provinces, multiple codes must be built such as York, PA and York, ME.

## Banner form

County Code Validation STVCNTY 8.0 (BAN8_WIN)		
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
09	Test Client County	19-AUG-2005
111	Test county	12-OCT-2006
1111	Test 2	12-OCT-2006

# Nation Code Validation (STVNATN)

## 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. This form is also used to cross reference these Banner values to the various equivalents indicated (SEVIS, EDI, LMS, etc.).

## Banner form

Nation Code	Description	SEVIS Equivalent	EDI Equivalent	LMS Equivalent	ISO Code	Canadian Statistics Code	MMREF Code	Activity Date
1	Afghanistan	AF			AIA			30-OCT-2006
2	Albania	AL			XX			17-SEP-2002
3	Algeria	AG			XY			17-SEP-2002
4	Andorra	AN						09-JAN-2004
5	Angola	AO			ZZZ			09-JAN-2004
6	Antigua and Barbuda	AV						09-JAN-2004
7	Argentina	AR	X	X	V	x		09-JAN-2004
AW	Aruba	AA			ABW			05-SEP-2002
8	Australia	AS			XXX			09-JAN-2004
9	Austria	AU						09-JAN-2004
11	Bahrain							29-APR-1987
12	Bangladesh							29-APR-1987
13	Barbados							29-APR-1987
14	Belgium							29-APR-1987
15	Belize	BE						25-SEP-2002
16	Benin							29-APR-1987
17	Bhutan							29-APR-1987
18	Bolivia							29-APR-1987
19	Botswana							29-APR-1987
20	Brazil							29-APR-1987
21	Brunei							29-APR-1987
22	Bulgaria							29-APR-1987
23	Burma							29-APR-1987

# 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 8.0 (BAN8_WIN)		
Code	Description	Activity Date
BFAX	Business Fax	19-JUN-2007
BI	Billing	24-JAN-1992
BU	Business or work	26-JUL-1994
CAR	Car	24-JAN-1992
EMER	Emergency Contact	30-MAR-1995
FA	Firm Address	24-JAN-1992
FAX	Fax	24-JAN-1992
HO	Home telephone	08-DEC-2005
HQ	Corporate Headquarters	24-JAN-1992
MA	Mailing	24-JAN-1992
MG	Matching Gift	03-JAN-1995
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
PR	Permanent	03-JAN-1995
RH	Residence Hall	06-APR-1995
SB	Corporate Subsidiary	24-JAN-1992
SC	School Campus	24-JAN-1992
SE	Seasonal	06-FEB-1995
TE	Temporary	24-JAN-1992

# Address Source Validation (STVASRC)

## 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



Code	Description	Activity Date
AMCA	AMCAS Data Load	22-JUN-2006
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
SELF	Self reported by individual	03-JAN-1995
WEB	World Wide Web	25-JUN-1996

# E-Mail Address Type Validation (GTVEMAL)

## 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** checkbox is selected, the e-mail type will be included in List of Values (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
ALUM	Alumni Email address	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11-FEB-2008
AOL	AOL Email Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>	07-APR-2006
COM	Company Email address	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11-FEB-2008
EDU	Education Email Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11-FEB-2008
FUN	Fun Email Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>	07-APR-2006
HOME	Email Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11-FEB-2008
HOT	Hotmail Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11-FEB-2008
KEY1	Access Key to Building 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	02-FEB-2004
LUM	Luminis iMS Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	23-MAY-2007
PERS	Personal Email Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11-FEB-2008
TEST	Test Email Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11-FEB-2008
URL	URL Test	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	11-FEB-2008
WORK	Work Email Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11-FEB-2008
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	

# EDI/ISO Standard Code Validation (GTVSCOD)

## 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 8.0 (BAN8_WIN)				
Element	Code	Description	Standard	Activity Date
0001	UNOA	UN/ECE level A: As defined in ISO 646 (with the	E	18-FEB-2002
0001	UNOB	UN/ECE level B: As defined in ISO 646.	E	18-FEB-2002
0001	UNOC	UN/ECE level C: As defined in ISO 8859-1 : Infc	E	18-FEB-2002
0001	UNOD	UN/ECE level D: As defined in ISO 8859-2 : Infc	E	18-FEB-2002
0001	UNOE	UN/ECE level E: As defined in ISO 8859-5 : Info	E	18-FEB-2002
0001	UNOF	UN/ECE level F: As defined in ISO 8859-7 : Info	E	18-FEB-2002
0002	1	Version 1: ISO 9735:1988.	E	18-FEB-2002
0002	2	Version 2: ISO 9735:1990.	E	18-FEB-2002
0002	3	Version 3: ISO 9735 Amendment 1:1992.	E	18-FEB-2002
0007	1	DUNS (Dun & Bradstreet)	E	18-FEB-2002
0007	103	TW, Trade-van: Trade-van is an EDI VAN servic	E	18-FEB-2002
0007	12	Telephone number	E	18-FEB-2002
0007	14	EAN (European Article Numbering Association)	E	18-FEB-2002
0007	18	AIAG (Automotive Industry Action Group)	E	18-FEB-2002
0007	22	INSEE (Institut National de la Statistique et des I	E	18-FEB-2002
0007	30	ISO 6523Organization identification	E	18-FEB-2002
0007	31	DIN (Deutsches Institut fuer Normung): Germar	E	18-FEB-2002
0007	33	BfA (Bundesversicherungsanstalt fuer Angestellt	E	18-FEB-2002
0007	34	National Statistical Agency	E	18-FEB-2002
0007	4	IATA (International Air Transport Association)	E	18-FEB-2002

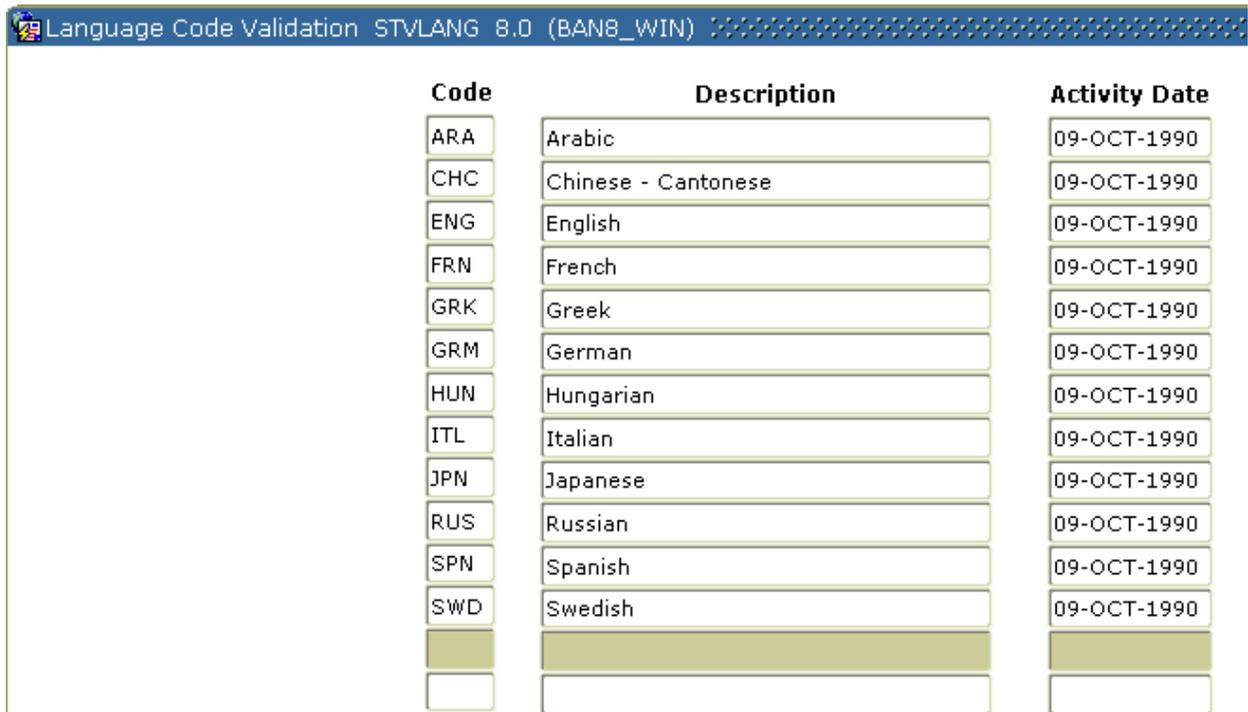
# Language Code Validation (STVLANG)

## 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



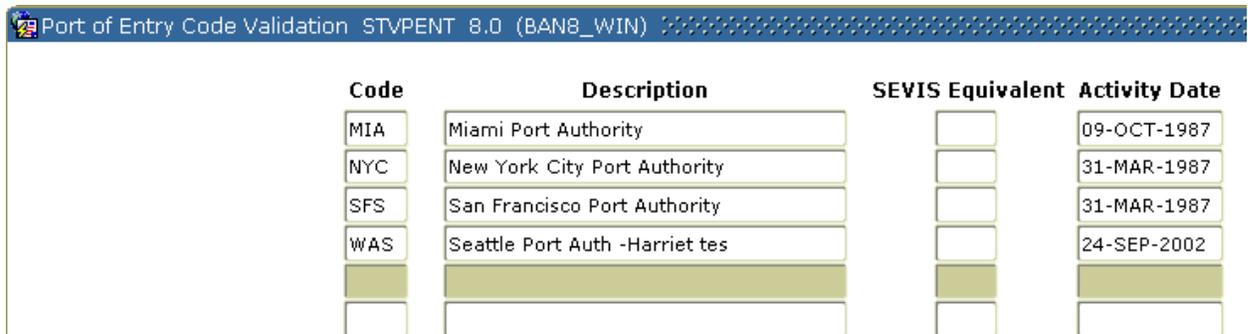
Code	Description	Activity Date
ARA	Arabic	09-OCT-1990
CHC	Chinese - Cantonese	09-OCT-1990
ENG	English	09-OCT-1990
FRN	French	09-OCT-1990
GRK	Greek	09-OCT-1990
GRM	German	09-OCT-1990
HUN	Hungarian	09-OCT-1990
ITL	Italian	09-OCT-1990
JPN	Japanese	09-OCT-1990
RUS	Russian	09-OCT-1990
SPN	Spanish	09-OCT-1990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

# Port of Entry Validation (STVPENT)

## 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 (GOAINTL) uses this form to validate the port of entry codes. You can only create and update these codes from this form.

## Banner form



The screenshot shows a window titled "Port of Entry Code Validation STVPENT 8.0 (BAN8\_WIN)". The window contains a table with the following data:

Code	Description	SEVIS Equivalent	Activity Date
MIA	Miami Port Authority	<input type="checkbox"/>	09-OCT-1987
NYC	New York City Port Authority	<input type="checkbox"/>	31-MAR-1987
SFS	San Francisco Port Authority	<input type="checkbox"/>	31-MAR-1987
WAS	Seattle Port Auth -Harriet tes	<input type="checkbox"/>	24-SEP-2002
		<input type="checkbox"/>	
		<input type="checkbox"/>	

# Visa Type Code Validation (STVVVTYPE)

## 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. This form is also used to cross reference the Banner values to Admissions Checklist items, Statistics Canada and SEVIS codes.

## Banner form

Visa Type Code Validation STVVVTYPE 8.0 (BAN8\_WIN)

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"/>				09-JAN-2004
E2	Dependent of Foreign Investor			<input type="checkbox"/>				09-JAN-2004
F1	Student Visa			<input type="checkbox"/>			01	09-SEP-2002
F2	Dependent of Student			<input type="checkbox"/>			04	09-SEP-2002
H1	Special			<input type="checkbox"/>				06-NOV-2002
H2	Dependent of Special			<input type="checkbox"/>				18-AUG-1987
J1	Exchange Scholar			<input type="checkbox"/>			03	09-SEP-2002
J2	Dependent of Exchange Scholar			<input type="checkbox"/>			06	09-SEP-2002
M1	SEVIS M1 Visa Type			<input type="checkbox"/>			02	16-SEP-2003
M2	SEVIS visa type			<input type="checkbox"/>			05	05-FEB-2003
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
UN	Unknown Visa Type			<input type="checkbox"/>				12-NOV-2002
				<input type="checkbox"/>				

# International Student Sponsor Code Validation (STVSPON)

## 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



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

# Employment Validation Form (STVEMPT)

## 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

# Citizen Type Code Validation (STVCITZ)

## Introduction

You use this form to create, update, insert, and delete citizen type codes (i.e., Canadian Citizen, Non-Citizen, 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
N	Non-Citizen	<input type="checkbox"/>	<input type="checkbox"/>	22-JAN-1992
Y	Citizen	<input checked="" type="checkbox"/>	<input type="checkbox"/>	22-JAN-1992
		<input type="checkbox"/>		
		<input type="checkbox"/>		

# Ethnic Code Validation (STVETHN)

## 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. This form is also used to cross reference Banner values to values used by other systems (IPEDS, EDI, LMS, etc.) and New Ethnicity codes used for U.S. federal reporting.

## Banner form

Ethnic Code Validation STVETHN 8.0 (BAN8_WIN)									
Ethnic Code	Description	IPEDS Code	EDI Equivalent	LMS	Institution Race Code	New Ethnicity	Activity Date		
1	Caucasian	5	<input type="checkbox"/>	<input type="checkbox"/>	WHI White	None	12-OCT-2006		
2	African-American	1	<input type="checkbox"/>	<input type="checkbox"/>	BLA Black - African American	None	12-OCT-2006		
3	Hispanic-Other	4	<input type="checkbox"/>	<input type="checkbox"/>	WHI White	None	12-OCT-2006		
3C	Cuban		<input type="checkbox"/>	<input type="checkbox"/>	WHI White	None	12-OCT-2006		
3M	Mexican		<input type="checkbox"/>	<input type="checkbox"/>	WHI White	None	12-OCT-2006		
3P	Puerto Rican		<input type="checkbox"/>	<input type="checkbox"/>	WHI White	None	12-OCT-2006		
4	Asian Pacific Islander	3	<input type="checkbox"/>	<input type="checkbox"/>	HAW Hawaiian	None	12-OCT-2006		
5	Sioux	2	<input type="checkbox"/>	<input type="checkbox"/>	IND American Indian	None	12-OCT-2006		
6	Other	6	<input type="checkbox"/>	<input type="checkbox"/>	WHI White	Not Hispanic or Latino	26-JUL-2007		
			<input type="checkbox"/>	<input type="checkbox"/>		None			
			<input type="checkbox"/>	<input type="checkbox"/>					

# Marital Status Code Validation (STVMRTL)

## 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
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

# Religion Code Validation (STVRELG)

## 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
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

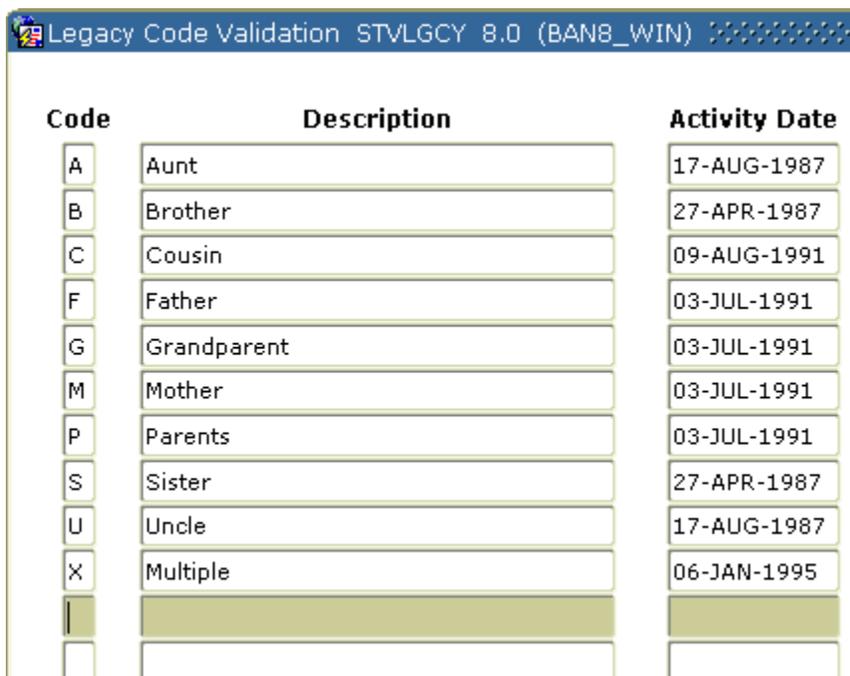
# Legacy Code Validation (STVLGCY)

## 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

# IPEDS Ethnic Code Validation (STVETCT)

## 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
6	Other	<input checked="" type="checkbox"/>	07-SEP-1990
		<input type="checkbox"/>	
		<input type="checkbox"/>	

# Immunization Code Validation (GTVIMMU)

## Introduction

You use this form to create, update, insert, and delete immunization codes (i.e., Measles, Mumps, Rubella etc.). The Immunization Form (GOAIMMU) uses this form to track immunizations for people in Banner. You may only create or update these codes from this form.

## Banner Form

Immunization Code	Description	User ID	Activity Date
			30-APR-2008

# Immunization Status Code Validation (GTVIMST)

## Introduction

You use this form to create, update, insert, and delete immunization status codes (i.e., Exempt Due to Age, Innoculated, etc.). The Immunization Form (GOAIMMU) uses this form to track immunization status codes for immunizations for people in Banner. You may only create or update these codes from this form.

## Banner Form

Immunization Status	Description	User ID

# Hold Type Code Validation (STVHLDD)

## Introduction

You use this form to create, update, insert, and delete hold codes (i.e., Application Hold, Registrar's Hold, Dean's Hold, etc.). The Hold Information Form (SOAHOLD) uses this form to track hold codes that may impact processing in various Banner areas for people in Banner. You may only create or update these codes from this form.

## Banner Form

Code	Description	Enrollment						Application	Compliance	Voice Message
		Registration	Verification	Transcript	Graduation	Grade	A/R			
AR	Accounts Receivable Hold	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
BM	Testing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
DH	Dean's Hold	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
FH	Financial Hold	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
LF	Library Fine	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
LO	Loans Office	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
PF	Parking Fine	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
RH	Registrar's Hold	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
TH	Tim's Hold	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

# Self Check

---

## 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. Contact Type Validation            | _____ | create, update, insert, and delete originator codes                        |
| b. Appointment result Code Validation | _____ | create, update, insert and delete state and province codes                 |
| c. Address Type Code Validation       | _____ | create, update, insert, and delete disability type codes                   |
| d. General Medical Information        | _____ | create, update, insert, and delete disability service codes                |
| e. Recruiter Code Validation          | _____ | create, update, insert, and delete nation codes                            |
| f. Relation Code Validation           | _____ | view and update medical conditions of people at your institution           |
| g. Originator Code Validation         | _____ | identify zip codes and postal codes used throughout Banner                 |
| h. Name Type Validation               | _____ | create, update, insert, and delete recruiter codes                         |
| i. Disability Service Code Validation | _____ | create, update, insert, and delete address type codes                      |
| j. Disability Type Code Validation    | _____ | create, insert, and delete county codes                                    |
| k. County Code Validation             | _____ | create, update, insert and delete comment types and their respective codes |
| l. Comment 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                          |
| n. Nation Code Validation             | _____ | create, update, insert and delete appointment result codes                 |
| o. State/Province Code Validation     | _____ | create, update insert, and delete recruiting contact type codes            |

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

# Answer Key for Self Check

---

## Question 1

Answers are in bold.

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

## Question 2

Answers are in bold.

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

# Day-to-Day Operations



## Section goal

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.

## Objectives

In this section you will learn how to

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

# Process Introduction

## About the process

Recruiting personnel create initial records for prospects. This data can roll to Admissions and be used in other modules. Records can also be added directly at the applicant stage.

Student information is created and maintained by various personnel throughout the entire Student process.

Note: Everyone needs to have an ID and name 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.

<b>Stage</b>	<b>Description</b>
<b>Recruiting Personnel</b>	
1	Receive inquiries and process a recruit record.
2	Capture initial information on prospects.
<b>Admissions Personnel</b>	
3	Process an applicant record.
4	Capture and maintain applicant information as needed.

# Establishing a Person/Generating an ID

## 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

The screenshot shows the SPAIDEN 8.0 (BAN8\_WIN) web form. At the top, there is a header bar with the title "General Person Identification SPAIDEN 8.0 (BAN8\_WIN)". Below the header, there is a form area with the following elements:

- ID:** A dropdown menu showing "210009506" and a text input field containing "Abbe, Anthony".
- Generate ID:** A button with a document icon.
- Navigation Tabs:** A row of tabs including "Current Identification" (selected), "Alternate Identification", "Address", "Telephone", "Biographical", "E-mail", "Emergency Contact", and "Additional Identification".
- ID:** A text input field containing "210009506".
- Name Type:** A dropdown menu.
- Person Section:** A form with the following fields:
  - Last Name:** Text input field containing "Abbe".
  - First Name:** Text input field containing "Anthony".
  - Middle Name:** Text input field.
  - Prefix:** Text input field containing "Mr.". There is a small dropdown arrow to the right of the field.
  - Suffix:** Text input field.
  - Preferred First Name:** Text input field.
  - Full Legal Name:** Text input field.
- Non-Person Section:** A form with the following field:
  - Name:** Text input field with a dropdown arrow to the right.
- ID and Name Source Section:** A form with the following fields:
  - Last Update:** A section header.
  - User:** Text input field containing "SAISUSR".
  - Activity Date:** Text input field containing "11-DEC-1995".
  - Origin:** Text input field containing "SPAIDEN".
- Original Creation Section:** A form with the following fields:
  - User:** Text input field.
  - Create Date:** Text input field.

## 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, if enabled based on the settings at your institution. This form enables you to avoid adding duplicate entries to the database.

## Fields

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

Field Name	Description	Value
<b>Key block</b>		
<b>ID</b>	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
<b>Current Identification block</b>		
<b>ID</b>	9 character code Create or update a current identification number associated with this ID Required	GENERATED
<b>Name Type</b>	4 character validated code Type of name associated with this ID	FRML (Formal)
<b>Person Name Information block</b>		
<b>Last Name</b>	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)

<b>Field Name</b>	<b>Description</b>	<b>Value</b>
<b>First Name</b>	60 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)
<b>Middle Name</b>	60 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)
<b>Prefix</b>	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)
<b>Suffix</b>	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
<b>Preferred First Name</b>	60 character preferred name Preferred name associated with this ID Use the preferred name corresponding with the first name (optional) Margaret Jane Smith would enter <i>Maggie</i>	[Your preferred name]  (Maggie)
<b>Full Legal Name</b>	500 character full legal name Full legal name associated with this ID (optional). Use the full legal name associated with this ID. Margaret J. Smith would enter <i>Margaret Jane Smith.</i>	[Your full legal name] Margaret Jane Smith
<b>Non-Person Information block</b>		
<b>Name</b>	60 character free-form text Enter the name of a non-person entry Required if ID is for a non-person	Blank if person

## 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.

## Steps

Follow these steps to enter an individual into Banner.

1. Access the Identification Form (SPAIDEN).
2. Select the **Generate ID** icon.

Result: 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.

Note: The remaining fields, **Middle Name**, **Prefix**, **Suffix**, and **Pref. First Name** fields are optional.

7. Click the **Duplicate Check** icon.

Note: 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.

Result: You are returned to the key block of SPAIDEN; the new ID appears in the **ID** field.

10. Perform a **Next Block** function.

Result: The **Last Name** and **First Name** fields are completed.

11. Complete any additional information if necessary and click the **Save** icon.

Note: Notice that a Generated ID number populates both **ID** fields.

12. Click the **Exit** icon.

## Steps

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.

1. Access the Identification Form (SPAIDEN).
2. Select the **Generate ID** icon.

Result: 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.

Note: The remaining fields are optional.

6. Click the **Duplicate Check** icon.

Note: 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.

Result: You are returned to the key block of SPAIDEN; the new ID appears in the **ID** field.

9. Perform a **Next Block** function.

Result: The **Last Name** and **First Name** fields are completed.

10. Complete any additional information if necessary and click the **Save** icon.

Note: Notice that a Generated ID number populates both **ID** fields.

11. Click the **Exit** icon.

# Assigning an Address/Multiple Addresses to an ID

## Introduction

Once a person/non-person has received an ID (identification) number and name, 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

General Person Identification SPAIDEN 8.0 (BAN8\_WIN)

ID: 210009506 Abbe, Anthony Generate ID:

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

**From Date:** 10-JUL-1995 **To Date:**  Inactivate Address

**Address Type:** MA Mailing **Source:**

**Sequence Number:** 1

**Street Line 1:** PO Box 21049 **Delivery Point:**

**Street Line 2:**

**Street Line 3:** **Correction Digit:**

**City:** Malvern **Carrier Route:**

**State or Province:** PA Pennsylvania

**ZIP or Postal Code:** 19355

**County:** 001 Chester

**Nation:** 1 Afghanistan

**Telephone Type:** MA Mailing

**Telephone:** 610 - 5551983

**Last Update**

**User:** SAISUSR

**Activity Date:** 11-FEB-2003

## Fields

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

Field	Description	Value
<b>Address Type</b>	2 character code The type of address to be entered Required	PR (Permanent)
<b>From Date</b>	11 character date The effective start date of this address  Note: Banner automatically assigns the current date which can be overridden.	01-SEP-2009
<b>To Date</b>	11 character date The date this address is no longer in effect	01-SEP-2010
<b>Inactivate Address</b>	Checkbox Is this address inactive?	Unchecked
<b>Street Line 1</b>  Street Line 2  Street Line 3	75 character address At least one line is required	4 Country View Road
<b>Sequence Number</b>	3 character numeric code Sequence number of address within address type System-generated when record is saved.	1
<b>City</b>	50 character city City portion of the address Required	Malvern
<b>State or Province</b>	3 character state code State portion of the address Required if no nation provided	PA

<b>Field</b>	<b>Description</b>	<b>Value</b>
<b>ZIP or Postal Code</b>	30 character ZIP/PC code ZIP/postal code portion of the address Required if state/province provided	19355
<b>County</b>	5 character code County portion of the address	001 Chester
<b>Nation</b>	5 character code Nation portion of the address	157 United States of America
<b>Source</b>	4 character code Identify how the address information was created or updated	CALL Phone call from individual
<b>User</b>	20 character text User who entered this address information System populated	[your user name]
<b>Delivery Point</b>	The delivery point for mail as established by the Postal Service Leave these blank for this exercise	Blank
<b>Activity</b>	11 character date, system-generated	[today's date]
<b>Date</b>	Date the address information was entered	
<b>Telephone</b>	6, and 12, and character numbers Area code, phone number, and extension associated with this address	610 5551212 1234
<b>Telephone Type</b>	10 character code Type of phone number	MA Mailing

## Steps

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

1. Access the Identification Form (SPAIDEN).
2. In the **ID** field, enter the ID number you generated previously.
3. Perform a **Next Block** function.
4. Click the **Address** tab.
5. Enter address information in the Address window, using the table on the previous pages if necessary.

Note: 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., *MA*) can exist for a person, but only one of the addresses can be active at a time.

6. Create another address for your person with the address type of *MA* (Mailing).

Note: This address and address type will be used in later exercises.

7. Click the **Save** icon.
8. Click the **Exit** icon.

# Making Changes to a Name

## 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
<b>Key block</b>		
<b>ID</b>	9 character code  Identification number associated with the person/non-person in the system  Required	[see previous exercise-retrieve ID for Margaret Jane Smith]
	Name area is non-enterable	
<b>Current Identification block</b>		
<b>ID</b>	9 character code Update a current identification number associated with this ID Required	[see previous]
<b>Name Type</b>	30 character free-form text Type of name associated with this ID	FRML Formal
<b>Person Name Information block</b>		
<b>Last Name</b>	60 character name Last name associated with this ID Margaret Smith Jones would enter <i>Jones</i> Required	Jones

<b>Fieldname</b>	<b>Description</b>	<b>Value</b>
<b>First Name</b>	60 character name First name associated with this ID Margaret Jane Smith Jones would enter <i>Margaret</i>	Margaret
<b>Middle Name</b>	60 character name Middle name associated with this ID Margaret Smith Jones would enter <i>Smith</i>	[Your middle name]  (Jane)
<b>Prefix</b>	20 character name prefix Name prefix associated with this ID Margaret Smith Jones would enter <i>Mrs.</i>	Mrs.
<b>Suffix</b>	20 character name suffix Name suffix associated with this ID Not applicable for this exercise	Blank
<b>Preferred First Name</b>	60 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.

## Steps

Follow these steps to edit a name. Use the table on the previous page where needed.

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 new middle and last name information in the appropriate fields in the Person Name Information block, as found in the table.
6. Click the **Save** icon.
7. Click the **Exit** icon.

# Entering Multiple Telephone Numbers

## 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 in 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 a software window titled "General Person Telephone SPATELE 8.0 (BAN8\_WIN)". At the top, there is a field for "ID:" containing the number "210009506" and a dropdown menu showing "Abbe, Anthony". Below this is a tab labeled "Telephone". The main area contains three identical form sections, each for adding a telephone number. Each section includes: "Telephone Type:" with a dropdown menu; "International Access:" with a text field; "Comment:" with a text field; "Address Type:" with a dropdown menu; "Sequence:" with a dropdown menu; "Activity Date:" with a date field; "User:" with a text field; and "Telephone:" with three input fields for area code, number, and extension. To the right of the telephone input fields are three checkboxes: "Primary", "Unlisted", and "Inactivate". A vertical scrollbar is visible on the right side of the form area.

General Person Identification SPAIDEN 8.0 (UDCSysT)

ID: 210009506 Abbe, Anthony Generate ID:

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

Telephone Type: MA Mailing Telephone: 610 - 5551983  
 International Access:   Primary  Unlisted  Inactivate  
 Comment:   
 Address Type: MA Mailing Sequence: 1 Activity Date: 10-JUL-1995 User:

Telephone Type:  Telephone:  -   
 International Access:   Primary  Unlisted  Inactivate  
 Comment:   
 Address Type:  Sequence:  Activity Date:  User:

Telephone Type:  Telephone:  -   
 International Access:   Primary  Unlisted  Inactivate  
 Comment:   
 Address Type:  Sequence:  Activity Date:  User:

## Fields

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

<b>Field</b>	<b>Description</b>	<b>Value</b>
<b>ID</b>	9 character code Identification number associated with the person/non-person in the system Required	[see previous]
<b>Telephone Type</b>	4 character code Type code of the telephone number Required	FAX (Fax)
<b>Telephone</b>	6 and 12 character number fields Telephone number Required	215 5552121
<b>(Extension)</b> <i>unlabeled</i>	Telephone number's extension	Not applicable for this exercise
<b>Primary</b>	Checkbox Is this the primary telephone number if multiple telephone numbers exist for a telephone type?	Unchecked
<b>Unlisted</b>	Checkbox Is this telephone number unlisted?	Unchecked
<b>Inactive</b>	Checkbox Is this telephone number inactive?	Unchecked
<b>International Access</b>	16 character code Specify the International Access code for dialing an international telephone number	Blank
<b>Address Type</b>	2 character code Type code for the address	Not applicable for this exercise
<b>Sequence</b>	2 character number Sequence number associated with the address	Not applicable for this exercise

Field	Description	Value
Date	11 character date The date this record was created System-generated	[today's date]

## Steps

Follow these steps to enter a telephone number. Use the table on the previous and current pages where necessary.

1. Access the Telephone Form (SPATELE).
2. Enter various types of telephone numbers for the ID you generated previously, using the table.
3. Click the **Save** icon.
4. Click the **Exit** icon.

# Capturing Biographic Information

## 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

The screenshot shows the 'General Person SPAPERS 8.0 (BAN8\_WIN)' application window. At the top, the ID is 210009508 and the name is Abbe, Anthony. The 'Biographical' section contains the following fields:

- Gender:** Radio buttons for Male, Female, and Not Available (selected).
- Birth Date:** Calendar icon.
- Age:** Text input field.
- SSN/SIN/TIN:** Text input field.
- Deceased Date:** Calendar icon.
- Confidential:**
- Deceased:**
- Citizenship:** Dropdown menu.
- Marital Status:** Dropdown menu.
- Religion:** Dropdown menu.
- Legacy:** Dropdown menu.
- Ethnicity:** Dropdown menu.
- New Ethnicity:** Dropdown menu (set to None).
- Ethnicity and Race Confirmed:**
- Confirmed Date:** Calendar icon.
- Veteran File Number:** Text input field.
- Veteran Category:** Dropdown menu (set to None).
- Active Duty Separation Date:** Calendar icon.
- Special Disabled Veteran:**

A 'Last Update' box contains 'User' and 'Activity Date' text input fields. Below this is a table with columns for 'Race', 'User', and 'Activity Date'.

Race	User	Activity Date
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

General Person Identification SPAIDEN 8.0 (UDCSysT)

ID: 210009506 Abbe, Anthony Generate ID:

Current Identification | Alternate Identification | Address | Telephone | **Biographical** | E-mail | Emergency Contact | Additional Identification

**Gender:**  Male  
 Female  
 Not Available

**Birth Date:** 26-MAR-1977   
**Age:** 31  
**SSN/SIN/TIN:**

Confidential  
 Deceased  
**Deceased Date:**

**Citizenship:** N  Non Resident Alien  
**Marital Status:** S  Single  
**Religion:** LU  Lutheran  
**Legacy:**    
**Ethnicity:** 1  Caucasian  
**New Ethnicity:** None  Ethnicity and Race Confirmed  
**Confirmed Date:**

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

**Last Update**  
**User:** JCOLEBUR  
**Activity Date:** 11-APR-2008

Race	User	Activity Date
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

## Fields

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

Fieldname	Description	Value
<b>ID</b>	9 character code Identification number associated with the person/non-person in the system Required	[see previous]
<b>Gender</b>	Radio button Gender of the person Default: Not Available Required	Female (for Margaret)
<b>Birth Date</b>	11 character date Birth date of the person	01-JAN-1990
<b>Age</b>	3 character number Age of the person System-calculated	[system calculated]
<b>SSN/SIN/TIN</b>	9 character number Social Security Number, Social Insurance Number, or Tax File number of the person	012345678
<b>Confidential</b>	Checkbox Is this person's record confidential?	Unchecked
<b>Deceased</b>	Checkbox Is this person deceased?	Unchecked
<b>Deceased Date</b>	Date format DD-MM-YYYY  Date the person died Required if Deceased checkbox is checked	Leave blank
<b>Citizenship</b>	2 character code Citizenship Type code of the person	Y (Citizen)
<b>Marital Status</b>	1 character code Marital Status Type code of the person	M (Married)
<b>Religion</b>	2 character code Religion Type code of the person	OT (Other)

<b>Fieldname</b>	<b>Description</b>	<b>Value</b>
<b>Legacy</b>	1 character code Relative who attended the same organization	M (Mother)
<b>Ethnicity</b>	2 character code Ethnicity Type code of the person	1 (Caucasian)
<b>New Ethnicity</b>	Drop-down  Hispanic or Latino, Not Hispanic or Latino, or None	None
<b>Ethnicity and Race Confirmed</b>	Checkbox	Unchecked
<b>Confirmed Date</b>	Date format DD-MM-YYYY	Blank
<b>Veteran File Number</b>	10 character number Veteran Identification number associated with the person	Blank
<b>Veteran Category</b>	Pull-down list Designates if the person was a veteran during the Vietnam war era	None
<b>Active Duty Separation Date</b>	Date format DD-MM-YYYY	Blank

## Exercise

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

## Steps

Follow these steps to enter biographic information. Use the table on the previous and current page where indicated.

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.

# Entering Comments

## Introduction

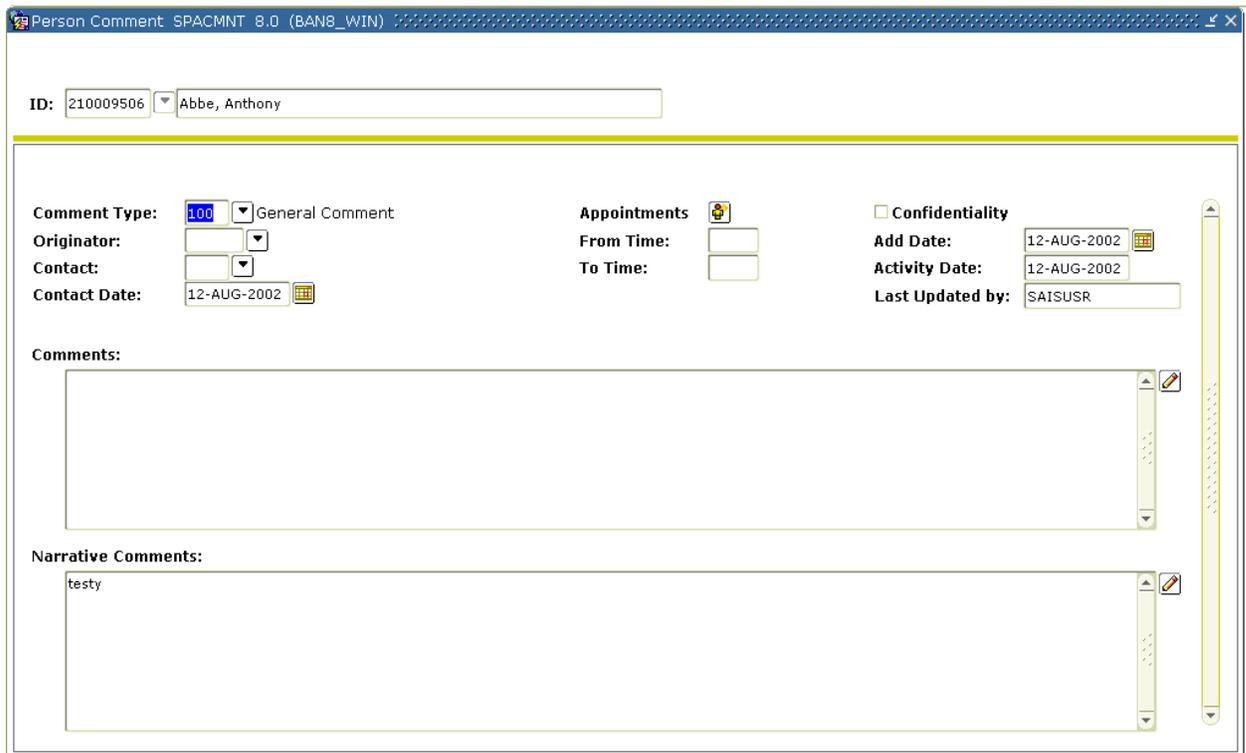
You have received even more information regarding Margaret Jane Smith that must be entered into the system.

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 8.0 (BANB\_WIN)

ID: 210009506 Abbe, Anthony

**Comment Type:** 100 General Comment

**Originator:** [ ]

**Contact:** [ ]

**Contact Date:** 12-AUG-2002

**Appointments** [ ]

**From Time:** [ ]

**To Time:** [ ]

**Confidentiality**

**Add Date:** 12-AUG-2002

**Activity Date:** 12-AUG-2002

**Last Updated by:** SAISUSR

**Comments:**

**Narrative Comments:**

testy

## Exercise

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

## Steps

Follow these steps to add a comment.

1. Access the Comment Form (SPACMNT).
2. Enter Margaret's ID number in the **ID** field.
3. Enter *107* (Sorority) in the **Comment Type** field.
4. Select an originator code representing the office you are representing in the **Originator** field.

Note: In this case, enter *ADMS* (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.

Note: There is a **Narrative Comments** field for long narrative comments on the person if you wish to use it.

# Entering Medical Information

## Introduction

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

## Banner form

The screenshot displays the 'General Medical Information GOAMEDI 8.0 (BAN8\_WIN)' window. At the top, the ID is set to '210009508' and the name is 'Mr. Anthony Abbe'. The form contains three identical sections for entering medical data. Each section includes:

- Medical Code:** A dropdown menu.
- Medical Date:** A date picker.
- Disability Type:** A dropdown menu.
- Equipment Code:** A dropdown menu.
- Comment:** A text area with an edit icon.
- User ID:** A text input field.
- Activity Date:** A date input field.
- Disability Onset Age:** A text input field.
- Disability Service:** A dropdown menu.
- Primary Disability:** A checkbox.

## 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 (GOAMED1) so that the necessary offices will know about her condition.

## Steps

Follow these steps to add medical information.

1. Access the Medical Information Form (GOAMED1).
2. Enter the ID number if it is not already there in the **ID** field.
3. Perform a **Next Block** function.
4. Enter *DI* (Diabetic Insulin User) in the **Medical Code** field.

Note: 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.

# Entering Immunization Information

## Introduction

The Immunization Information Form (GOAIMMU) is used to view and update immunization information for people at your institution, including students, faculty, and staff.

## Banner form

The screenshot shows a web browser window titled "Immunization Information GOAIMMU 8.0 (BAN8\_WIN)". The form displays the following information:

- ID:** 00010989
- Name:** Man Smith
- Immunization:** [Dropdown menu]
- Immunization Date:** [Calendar icon]
- Status:** [Dropdown menu]
- User ID:** SAISUSR
- Activity Date:** 30-APR-2008
- Comment:** [Text area with edit icon]

Below this, there are two more identical form sections for additional immunization entries, each with fields for Immunization, Immunization Date, Status, User ID, Activity Date, and Comment.

## Exercise

You need to record the fact that Margaret has received a Malaria inoculation. You will enter this information on the Immunization Information Form (GOAIMMU) .

## Steps

Follow these steps to add immunization information.

1. Access the Immunization Information Form (GOAIMMU).
2. Enter the ID number if it is not already there in the **ID** field.
3. Perform a **Next Block** function.
4. Enter *Malaria* the **Immunization Code** field.
5. Enter *TA* (Taken) in the **Status Code** field.
6. Enter today's date in the **Immunization Date** field.

Note: No other fields are required on this form.

7. Click the **Save** icon.
8. Click the **Exit** icon.

# Entering Emergency Contact Information

## 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

The screenshot shows a web browser window titled "Emergency Contact SPAEMRG 8.0 (BAN8\_WIN)". The browser address bar shows "ID: 210009508" and a search field containing "Abbe, Anthony". Below the browser window is the "Emergency Contact" form. The form contains the following fields:

- Priority:** A small empty text box.
- Contact Last Name:** A text box.
- First Name:** A text box.
- Middle:** A text box.
- Relationship:** A dropdown menu.
- Address Type:** A dropdown menu.
- Street Line 1:** A text box.
- Street Line 2:** A text box.
- Street Line 3:** A text box.
- City:** A text box.
- State or Province:** A dropdown menu.
- ZIP or Postal Code:** A text box with a dropdown arrow.
- Nation:** A dropdown menu.
- Telephone:** A text box followed by a hyphen, another text box, and a dropdown arrow.
- Last Update:** A box containing:
  - User:** A text box.
  - Activity Date:** A text box.

General Person Identification SPAIDEN 8.0 (UDCSysT)

ID: 210009506 Abbe, Anthony Generate ID: 

**Priority:**

**Contact Last Name:** 
**First Name:** 
**Middle:**

**Relationship:**

**Address Type:**

**Street Line 1:**   
**Street Line 2:**   
**Street Line 3:**

**City:**

**State or Province:**

**ZIP or Postal Code:**

**Nation:**

**Telephone:**  -

**Last Update**

**User:**

**Activity Date:**

## Exercise

In case Margaret would experience diabetic shock, she would like the school 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.

## Steps

Follow these steps to add emergency contact information.

1. Access the Emergency Contact Form (SPAEMRG).
2. Enter the ID number in the **ID** field, if necessary.
3. Enter *1* in the **Priority** field (required), indicating the person being entered on this form should be contacted first in an emergency.

Note: 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 *P* (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.

Note: 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.

# Entering International Information

## Introduction

The International Information Form (GOAINTL) is used to add and update international and visa information, including nation of citizenship and I-20 information.

Warning: This form could display information that is considered confidential by certain individuals or institutions. When granting access to this form, please consult your site-specific policies for protecting confidential information.

## Banner form

International Information GOAINTL 8.0 (BAN8\_WIN)

ID: 210009506 Mr. Anthony Abbe

Visa Passport Certification of Eligibility Nationality

**Visa Information**

Visa Type:

Visa Number:

Nation of Issue:

Issuing Authority:

Port of Entry:

Sequence Number:

Entry

Number of Entries:

Date Requested:

Date Issued:

Start Date:

End Date:

**Document Information**

Document	Description	Source	Description	Date Requested	Disposition	Date Received
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>

## Steps

Follow these steps to enter international information.

1. Access the International Information Form (GOAINTL).
2. Enter the Banner ID for which you would like to see or enter visa information.
3. Perform a **Next Block** function to access the Visa window.

Note: The Visa window consists of the Visa Information block and the Document Information block. The current visa information, based on the system date and Start Date, is automatically displayed.

4. Enter the fields in the Visa window, using the table below as a guide.

Field	Description
Visa Type	Type code for the visa. This can be added to the record, but not modified.
Visa Number	The visa number, with a maximum length of 18 characters.
Nation of Issue	The nation that issued this visa.
Issuing Authority	The agency that authorized the issuance of the visa.
Port of Entry	The port where the person entered the country.
Sequence Number	Indicates which visa's information is being displayed. It is automatically incremented as new visa records are added for the person. (Display-only)
Entry	The entry visa indicator.  <i>Selected</i> - the visa is an entry visa  <i>Cleared</i> - the visa is some other type of visa (default)
Number of Entries	The number of times this ID has used this visa to enter the country. If used, this must be a 2-digit number from 01 - 99. If <b>Entry</b> has been selected, this is required.

Field	Description
Date Requested	The date the visa was requested. The default value is the system date, but you can change it.
Date Issued	The date the visa was issued. The default value is the <b>Date Requested</b> , but you can change it.
Start Date	The date the visa started. The default value is the <b>Date Issued</b> , but you can change it.
End Date	The date the visa expired. It cannot predate the <b>Start Date</b> .

5. Click the **Save** icon.
6. Perform a **Next Block** function to access the Document Information block.

Note: This block lets you add multiple supporting documents for the visa in the Visa Information block.

7. Enter the type of document that supports this visa in the **Document** field.

Note: The description of the document code will populate automatically from the Document Code Validation Form (GTVDOCM).

8. Enter the code that identifies the source of the document code in the **Source** field.

Note: The description of the source code will populate automatically from the Visa Source Code Validation Form (GTVSRCE).

9. Enter the date the supporting documentation was requested in the **Date Requested** field.

10. Enter the status of the supporting documentation in the **Disposition** field.

Note: Use the pull-down list to select the appropriate value:

- *Pending* - the documentation is being processed (default)
- *Accepted* - the documentation has been accepted
- *Rejected* - the documentation was rejected

11. Enter the date the supporting documentation was received by your institution in the **Date Received** field.

Note: The default value is the **Date Requested**, but you can change it.

12. Click the **Save** icon.

13. Perform a **Next Block** function or click the Passport tab to access the Passport window.

Note: This window contains information about the person's passport, and about their admission and departure. It does not depend on the information in the Visa Information or Documentation Information blocks.

14. Enter the information in the Passport window, using the table that follows as a guide to the fields.

<b>Field</b>	<b>Description</b>
Number	The passport number, with a maximum length of 15 characters.
Nation of Issue	The nation that issued the passport.
Expiration Date	The date the passport expires.
Status	The passport's status. Enter an I-94 status in this 3-character freeform field.
Expiration Date	The date the admission/departure expires.
Alien Registration Number	The alien registration number, with a maximum length of 15 characters.
Duration of Stay	The duration of stay indicator. <i>Selected</i> - the visa is for the length of stay <i>Cleared</i> - the visa is not for the length of stay (default)

15. Click the **Save** icon.

16. Perform a **Next Block** function or click the Certification of Eligibility tab to access the Certification of Eligibility window.

Note: The Certification Information window allows you to see or enter information for the visa.

17. Enter the certification code for the visa in the **Certification** field.

18. Enter the certification number, with a maximum length of 11, in the **Number** field.
19. Enter the date the certification was issued in the **Issue Date** field.
20. Enter the date the certification was received in the **Receipt Date** field.
21. Enter the admission *VISA* request code in the **Admission Request** field.
22. Click the **Save** icon.
23. Perform a **Next Block** function or click the Nationality tab to access the Nationality window.

Note: This window contains information about the nationality of the person or organization in the key block. It does not depend on information entered in any of the other blocks.

24. Enter the information in the Nationality window, using the table that follows as a guide to the fields.

<b>Field</b>	<b>Description</b>
Nation of Birth	The nation where the person was born.
Nation of Citizen	The nation where the person is currently a citizen.
Native Language	The person's native language.
Sponsor	The sponsor code.
Employment Type	The code for the type of employment the person has.
Foreign Tax ID	The tax identification number. This is a 9-character free-form field.
Spouse Accompanying Person to Country	Indicates if the person's spouse came to this country with them. Use the pull-down list to select: <ul style="list-style-type: none"> <li>• <i>Not Reported</i> - the information was not reported (default)</li> <li>• <i>Yes</i> - the spouse did come</li> <li>• <i>No</i> - the spouse did not come</li> </ul>

Number of Children Accompanying Person	A 2-digit field where you can enter the number of children the person brought with them to the country.
Signature for Availability of Funds	Field for recording if a signature is required to release scholarship funds. Use the pull-down list to select: <ul style="list-style-type: none"><li>• <i>Not Reported</i> - the information was not reported (default)</li><li>• <i>Yes</i> - Signature is required</li><li>• <i>No</i> - Signature is not required</li></ul>

25. Click the **Save** icon.

26. Click the **Exit** icon.

# Adding or Updating Appointments and Contacts

## 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 in order to use this form.

## Banner form

The screenshot shows the SOAAPPT 8.0 Banner form interface. At the top, the window title is "Person Appointments/Contacts SOAAPPT 8.0 (BAN8\_WIN)". Below the title bar, there are input fields for "ID:" (containing "210009506"), a dropdown menu (containing "Abbe, Anthony"), "Appointment Range Start Date:", and "End Date:". The form is divided into two main sections: "Appointments" and "Contacts".

**Appointments Section:**

- Appointment Date: 02-APR-2008 (with a calendar icon)
- From Time: [ ] To Time: [ ]
- Contact: [ ]
- Interviewer: [ ]
- Recruiter: [ ]
- Source Code: [ ]
- Interview Result: [ ]

Below these fields, there are two rows of empty input fields for "Appointment Date:", "From Time:", "To Time:", "Contact:", "Interviewer:", "Recruiter:", and "Interview Result:".

**Contacts Section:**

- Contact Type: [ ]
- Contact Date: [ ]

The "Contacts" section contains a table with two columns: "Contact Type" and "Contact Date". There are five empty rows for data entry.

## 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.

## Steps

Follow these steps to complete the process.

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 *June 21* and an end date of *September 1* in the **Appointment Range Start Date** and **End Date** fields.  
Example: 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.  
Note: Time is entered using four digits based on the 24-hour clock.  
Example: 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 *PHN* (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.  
Note: Click the down arrow next to this field to view valid codes.
10. Click the **Save** icon.
11. Click the **Exit** icon.

# Assigning and Releasing Holds

## Introduction

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

## Banner form

Hold Information SOAHOLD 8.0 (BAN8\_WIN)

ID: 210009506 Mr. Anthony Abbe

**Hold Details**

Hold Type:	<input type="checkbox"/>	Reason:	<input type="text"/>	Release Indicator:	<input type="checkbox"/>
Amount:	<input type="text"/>	From:	<input type="text"/>	To:	<input type="text"/>
		Origination Code:	<input type="text"/>		
Hold Type:	<input type="checkbox"/>	Reason:	<input type="text"/>	Release Indicator:	<input type="checkbox"/>
Amount:	<input type="text"/>	From:	<input type="text"/>	To:	<input type="text"/>
		Origination Code:	<input type="text"/>		
Hold Type:	<input type="checkbox"/>	Reason:	<input type="text"/>	Release Indicator:	<input type="checkbox"/>
Amount:	<input type="text"/>	From:	<input type="text"/>	To:	<input type="text"/>
		Origination Code:	<input type="text"/>		

## Exercise 1

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

## Steps

Follow these steps to complete the process.

1. Access the Hold Information Form (SOAHOLD).
2. Enter Margaret's ID number if in the **ID** field, if necessary.
3. Enter *RH* (Registrar's Hold) in the **Hold Type** field.

Note: If you check the Release checkbox only YOU will be able to release the hold.

4. Enter *Incomplete Application* in the **Reason** field.

Note: If a reason is entered, it will display on the web.

5. Enter the dollar amount associated with the hold in the **Amount** field (for the purpose of this exercise leave this blank).
6. Today's date should appear in the **From** field.

Note: 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.

Note: This date can be changed accordingly.

8. Enter *ADMS* (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.

## Steps

Follow these steps to complete the process.

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.

Note: 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.

# Person Directory Report

## 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 form

The screenshot shows a web browser window titled "Process Submission Controls GIAPCTL 8.0 (BAN8)". The form contains the following sections:

- Process:** A dropdown menu set to "SPRPDIR" and a text field containing "Person Directory".
- Parameter Set:** A dropdown menu.
- Printer Control:** A section with a "Printer:" dropdown, a "Special Print:" text field, "Lines:" set to "60", and a "Submit Time:" text field.
- Parameter Values:** A table with two columns: "Number" and "Parameters" (with a dropdown arrow), and "Values" (with a dropdown arrow). The table contains the following data:

Number	Parameters	Values
01	Term	199801
02	Person Type List	F
03	Confidential Person Print Ind	Y
04	Address Selection Date	10-AUG-1998
05	Address Hierarchy	1MA
06	Print ID	Y
07	Faculty Type	B
08	Selection Identifier	

Below the table, the text reads: "LENGTH: 6 TYPE: Character O/R: Required M/S: Single Report Term."

- Submission:** A section with a checkbox for "Save Parameter Set as", a "Name:" text field, a "Description:" text field, a radio button for "Hold", and a radio button for "Submit".

## Exercise 1

You have received a request from the Registrar's Office to produce a directory of all current students.

### Steps

Follow these steps to complete the process.

1. Access the Process Submission Control Form (GJAPCTL).
2. Enter *SPRPDIR* in the **Process** field of the Key Block.
3. Perform a **Next Block** function.
4. Enter *database* in the Printer field of the Printer Control Block.
5. Perform a **Next Block** function.
6. Enter the following parameter values:

01	Term	200910
02	Person Type List	S
03	Confidential Person Print Ind	N
04	Address Selection Date	enter today's date
05	Address Hierarchy	1MA
06	Print ID	Y
07	Faculty Type	leave blank
08	Selection Identifier	leave blank
09	Application Code	leave blank
10	Creator ID	leave blank
7. Perform a **Next Block** function.
8. Click the **Save** icon.
9. Select the **Review Output** command from the Options menu, and review the output file.

10. Click the **Exit** icon.

# Self Check

---

## 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?

- Andrews
- Arnolds
- 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 address information was created or updated?

## Question 6

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

## Question 7

If a person has multiple telephone numbers associated to 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 for a person?

## Question 13

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

# Answer Key for Self Check

---

## Question 1

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

**All three names would be returned.**

## 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 address 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 on the Address tab of SPAIDEN.**

## Question 6

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

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

## Question 7

If a person has multiple telephone numbers associated to 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 for 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)**

## Question 13

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

**The Hold Information Form (SOAHOLD)**

# Summary

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## Let's review

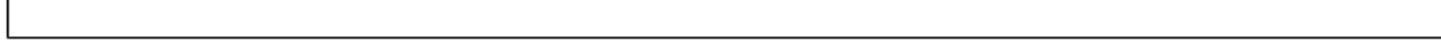
As a result of completing this workbook, you have

- defined a person and/or non-person to the General Person module of Banner.
- maintained supporting General Person information
- produced a General Person report.

## Next step

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

# Appendix



## Forms Job Aid

Form	Full Name	Use this Form to...
GOAIMMU	Immunization Information Form	view and update immunization information for an individual.
GOAINTL	International Information Form	add and update international and visa information, including nation of citizenship and I-20 information.
GOAMEDI	Medical Information Form	view and update medical information and medical comments for a person or persons.
GTVEMAL	E-Mail Address Type Validation	define valid e-mail address type codes, such as business, personal or school. Used by GOAEMAL.
GTVIMMU	Immunization Code Validation	create, update, insert and delete immunization codes, such as Malaria, Diphtheria, or MMR.
GTVIMST	Immunization Status Code Validation	create, update, insert and delete immunization status codes, such as Taken or Exempt due to age.
GTVNTYP	Name Type Validation	define codes for name types that can be associated with ID names, such as maiden, nickname or legal.
GTVSCOD	EDI/ISO Standard Code Validation	display the EDI/ISO standard code lists that are used in EDI documents.
GTVZIPC	Zip Postal Code Validation	identify ZIP codes and postal codes. Used by STVSITE, SLABLDG, SRAQUIK, and AGAGIFT.
SOAAPPT	Person Appointments/Contacts Form	add or update appointments and contacts for a person. Does not require a recruiting or admissions record.
SOAHOLD	Hold Information Form	assign and maintains holds for a person or entity.
SPACMNT	Person Comment Form	enter comment information on the person, including comment type, originator, confidentiality indicator and a date.
SPAEMRG	Emergency Contact Form	capture emergency contact information for persons.

<b>Form</b>	<b>Full Name</b>	<b>Use this Form to...</b>
SPAIDEN	General Person Identification Form	capture biographic/demographic information for all persons/non persons associated with the institution. Identifies person/non person to Banner with name and ID number. Tabs on this form include Current Identification, Alternate Identification, Address, Telephone, Biographical, E-mail and Emergency Contact.
SPAPERS	General Person Form	enter and maintain biographic information about a person, including gender, date of birth, marital status, legacy information and whether or not person is deceased. Also has confidentiality flag.
SPATELE	General Person Telephone Form	create and maintain an unlimited number of telephone numbers associated with a person. Each number may be associated with an address type and a sequence number.
SPRPDIR	Person Directory Report	produce a list of persons, addresses and primary phone numbers in the system by type of person.
STVASRC	Address Source Validation	maintain user-defined codes that identify address sources such as Self-Reported, Post Office Change or Electronic Data Interchange.
STVATYP	Address Type Code Validation	create, update, insert and delete address type codes, such as Billing, Permanent or Mailing. Also cross references a telephone type to an address type.
STVCITZ	Citizen Type Code Validation	create, update, insert and delete citizen type codes, such as Canadian Citizen or Student Visa. Used by SPAPERS.
STVCMTT	Comment Type Code Validation	create, update, insert and delete comment types and their respective codes, such as General Comment, Special Needs or Added via ACT Tape.
STVCNTY	County Code Validation	create, update, insert and delete county codes such as Delaware, Polk or Missoula.
STVCTYP	Contact Type Validation	create, update, insert and delete recruiting contact type codes such as Campus Visit, College Night or Merit List Letter.

<b>Form</b>	<b>Full Name</b>	<b>Use this Form to...</b>
STVDISA	Disability Type Code Validation	create, update, insert and delete disability type codes, such as Blind, Multiple Sclerosis or Hearing Impaired. Used by GOAMEDI.
STVEMPT	Employment Validation Form	create, update, insert and delete employment types, such as Self-employed, Employer Sponsored or No Employment on Record.
STVETCT	IPEDS Ethnic Code Validation	create, update, insert and delete IPEDS ethnic codes such as American Indian or Alaskan Native, Asian or Pacific Islander, or Hispanic. Used by STVETHN to validate IPEDS ethnic codes for SHRICIP.
STVETHN	Ethnic Code Validation	create, update, insert and delete ethnic codes, such as Caucasian, Chinese, or Cuban.
STVHLDD	Hold Type Code Validation	create, update, insert and delete hold codes, such as Registrar's Hold or Dean's Hold.
STVLANG	Language Code Validation	create, update, insert and delete language codes, such as Chinese, English or Spanish.
STVLGKY	Legacy Code Validation	create, update, insert and delete legacy codes to designate alumni relationships, such as Father, Mother or Brother.
STVMDEQ	Medical Equipment Code Validation	create, update, insert and delete medical equipment codes, such as Leg Braces, Seeing Eye Dog or Hearing Aid. Used by GOAMEDI.
STVMEDI	Medical Code Validation	create, update, insert and delete medical codes such as Blind, Deaf or Prosthetic Limb. Used by GOAMEDI.
STVMRTL	Marital Status Code Validation	create, update, insert and delete marital status codes, such as Married, Single or Widowed. Used by SPAPERS.
STVNATN	Nation Code Validation	create, update, insert and delete nation codes such as Australia, France, or Iceland.
STVORIG	Originator Code Validation	create, update, insert and delete originator codes such as Student Accounts Office, Bursar's Office, or Dean of Students.

<b>Form</b>	<b>Full Name</b>	<b>Use this Form to...</b>
STVPENT	Port of Entry Validation	create, update, insert and delete port of entry codes, such as Miami Port Authority, New York City Port Authority or San Francisco Port Authority. Used by GOAINTL.
STVRECR	Recruiter Code Validation	create, update, insert and delete recruiter codes, such as East Coast Recruiter, Central Recruiter or High School Recruiter.
STVRELG	Religion Code Validation	create, update, insert and delete religion codes such as Baptist, Hindu or Lutheran. Used by SPAPERS.
STVRELT	Relation Code Validation	create, update, insert and delete relation codes such as Mother, Brother or Spouse. Used by SPAEMRG and SOAFOLK.
STVRSLT	Appointment Result Code Validation	create, update, insert and delete appointment result codes such as Attended Interview, Did Not Attend, or Late to Interview. Used by SRARECR and SOAAPPT.
STVSPON	International Student Sponsor Code Validation	create, update, insert and delete sponsor codes, such as B'nai Brith, Knights of Columbus or Sunshine Foundation. Used by GOAINTL.
STVSPSR	Disability Service Code Validation	create, update, insert and delete disability service codes, such as County Paratransit Service, Hearing Aid Required or Disabled Student Services. Used by GOAMEDI.
STVSTAT	State/Province Code Validation	create, update, insert and delete state and province codes, such as Delaware, British Columbia or New South Wales.
STVTELE	Telephone Type Validation	create, update, insert and delete telephone type codes such as Car, Residence Hall, or Business. Cross referenced to address types on STVATYP.
STVVVYP	Visa Type Code Validation	create, update, insert and delete visa type codes, such as Tourist, Student Visa or Exchange Scholar. Used by GOAINTL.

# Terminology

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## 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.