Data Standards Manual
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1.0 Data Integrity

1.1 Administrative Responsibilities

These guidelines establish measures for the protection, access, and use of The University of Tennessee at Martin (UT Martin) administrative electronic information. The Guidelines also define the responsibilities of all who access and manage these data. Offices may have individual guidelines that supplement, but not supplant or contradict, this policy statement. Data entrusted to the University by other organizations (e.g., foundations or government agencies) are governed by terms and conditions agreed upon with those organizations. Specific issues not governed by such agreed terms shall be governed by this policy.

By law, data not classified as Directory Information are confidential and may not be released without proper authorization. Also, records explicitly declared confidential data may not be released without proper authorization. Users must adhere to any applicable federal and state laws as well as University of Tennessee at Martin policies and procedures concerning storage, retention, use, release, and destruction of data.

Data are a vital asset owned by The University of Tennessee at Martin. All institutional data, whether maintained in the central database or copied into other data systems (e.g., personal computers) remains the property of The University of Tennessee at Martin. Access to data should not be approved for use outside a user's official University of Tennessee at Martin responsibility. Data will be used only for authorized tasks.

As a general principle of access, University of Tennessee at Martin data, regardless of who collects or maintains it, will be shared among those employees whose work can be done more effectively by knowledge of such information. Although The University of Tennessee at Martin must protect the security and confidentiality of data, the procedures allowing access to data must not unduly interfere with the efficient conduct of University business.

All administrators will ensure that, for their areas of accountability,
each user is trained regarding user responsibilities. As part of that training, each user will read, understand, and agree to abide by the stipulations in this document. The Office of Academic Records will ensure that all new faculty, staff and student employees have the required FERPA training.

Division/department/unit heads (or designees) will ensure a secure office environment with regard to all University data systems. Division/department/unit heads (or designees) will determine the data access requirements of their staff as it pertains to their job functions before submitting a request for access.

All procedures and data systems owned and operated by The University of Tennessee at Martin will be constructed to ensure that:

- All data is input accurately.
- Accuracy and completeness of all data are maintained.
- System capabilities can be re-established after loss or damage by accident, malfunction, breach of security, or natural disaster.
- Breaches of security can be controlled and promptly detected.

### 1.2 Information Access

Two types of access can be granted to users:

- Inquiry-only access enables the user to view, analyze and download, but not change, institutional data. Downloaded information should be used and represented responsibly; the data should not be altered when presented in word processing documents, spreadsheets, etc.

- Update access provides both inquiry and update capabilities. Update capability is generally limited to the office directly responsible for the collection and management of the data. Update access is available to administrators and users who have an authorized need to change institutional data in the routine performance of their job duties.

Access for individual users must be requested by a division/department head or designee, for each user under their supervision, following the established procedure, using the established form(s), and providing the required signatures.

Each user of administrative information is assigned appropriate
combinations of inquiry only and update access to specific parts of the student information system. The types of access are determined by the data stewards below.

1.3 Data Stewards

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Data Steward</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Accounts Receivable</td>
<td>Business Affairs</td>
</tr>
<tr>
<td>Employees &amp; Affiliates</td>
<td>Human Resources and specific designees</td>
</tr>
<tr>
<td>Faculty</td>
<td>Academic Affairs</td>
</tr>
<tr>
<td>Financial Aid</td>
<td>Financial Aid and Scholarships</td>
</tr>
<tr>
<td>Prospective Students</td>
<td>Admissions, Graduate Studies, International Programs</td>
</tr>
<tr>
<td>Student Applications</td>
<td>Admissions, Graduate Studies, International Programs</td>
</tr>
<tr>
<td>Student Housing</td>
<td>Housing Office</td>
</tr>
<tr>
<td>Student</td>
<td>Academic Records, Graduate Studies, Student Health, Athletics</td>
</tr>
<tr>
<td>Non-person (donors, vendors, etc.)</td>
<td>Financial Aid and Scholarships, Business Affairs, Alumni Affairs, Development</td>
</tr>
</tbody>
</table>

On behalf of the data steward (usually an administrator of an office or department), ITS will review the request and may deny or approve the request. If approved, the request will be forwarded to the UT Martin Banner security administrator for processing.

Before granting additional access to data, the data steward shall be satisfied that protection requirements have been implemented and that a "need to know" is clearly demonstrated. By approving end-user access to institutional data, the data steward consents to the use of this data within the normal business functions of administrative and academic offices. Access to institutional data shall not be granted to persons unless there is an established "need to know."

Data stewards are responsible for the accuracy and completeness of data elements that they maintain. Misuse or inappropriate use by individuals will result in revocation of access privileges.

Data stewards are also responsible for the maintenance and control of the student information system's shared validation and rules tables at
1.4 Information Users

University of Tennessee at Martin information is one of the University's most valuable assets. Protecting that asset is the responsibility of all information users.

Users should read and become familiar with the Acceptable Usage Policy and procedures with regard to use of Information Technology Resources.

Users are responsible for understanding their respective data elements and how they are used. If they do not understand the meaning of a data element, they should consult the appropriate data steward or representative.

Users must observe requirements for confidentiality and privacy and must comply with control procedures to protect data from unauthorized use, disclosure, alteration, or destruction.

Users are responsible for all transactions occurring during the use of their login and password. Users are not to loan or share login identification or passwords with anyone. This is intended to help protect the integrity, security, and privacy of user accounts. Please refer to the UT Martin Security Policies and Best Practices.

It is UT Martin policy to perform background checks on the following employees: all newly hired regular employees, term faculty, police officers, employees in housing and the children’s center and any employee who has access to University master keys or cash. All employees are required to undergo FERPA training.
2.0 Confidential Indicator and Its Use

2.1 Students

Under the Family Educational Rights and Privacy Act of 1974 (FERPA), release of personally identifiable student education records (other than directory information) to any party other than those specified by FERPA is not permitted without the student's written consent. All employees must complete the FERPA Tutorial prior to being granted access to student data.

Note: For more information on FERPA, read the University policy: **Privacy of Education Records (Compliance with FERPA)**.

Further, by requesting that the Confidential Indicator be set, students may also elect to restrict their "Directory Information". The University of Tennessee at Martin asks that students carefully consider the consequences of a decision to restrict directory information. With directory information restricted, the University will:

- not include the student's name, address, or phone number in the Telephone Directory.
- not include the student's email address in the electronic directory.
- refuse to release any information about the student to insurance companies, current or future employers, all types of media, and any non-institutional persons or organizations.
- give no financial aid or personal information over the phone.
- state, "We have no information on a person by that name" to any request for information.

For these reasons, the confidential indicator is intended for individuals who have a compelling need to have all information about them kept private. This option should not be viewed by the student as a "do not mail or contact" option. Students will still receive mail, email, and
phone calls from the University.

Students that need to have their directory information remain confidential must file a written request with the Registrar's Office by the end of the 14th day of the semester.

**Directory Information**

At UT Martin, directory information is defined as the student's:

- Name
- Address
- Telephone listing
- Email address
- Date and place of birth
- Major field of study
- Participation in officially recognized activities and sports
- Weight and height (for members of athletic teams)
- Dates of attendance
- Degrees and awards received
- The previous education agency or institution most recently attended
- Classification

### 2.2 Releasing Students' Confidential Information

Releasing directory information about anyone who has requested confidentiality is prohibited unless it is released by the Office of Academic Records. Anyone (other than the Office of Academic Records) who releases any information about individuals coded as confidential will be in violation of University policy and other federal and state privacy laws. Any requests covered by the Sunshine Law should be emailed to the Registrar at registrar@utm.edu.

The Office of Academic Records handles all external requests for student information, and any such requests should be forwarded to that office.

### 2.3 Employees

Employee information is entered into IRIS (the official UT Human Resources database). Employees may choose to have their information confidential by indicating no phone, no address, or no phone/address on the Personal Data Form that is completed at the time they are hired. This applies on to the employee's home information. The employee's business information (office telephone number, office number, etc.) will still be listed in the various directories. Employee information is cross-
walked to the Banner system from a referential file that is sent to ITS each evening.

Human Resources handles all requests for employee information and any such request should be forwarded to Human Resources where the changes are made in IRIS. All changes will be included in the nightly referral file sent to ITS.
3.0 Creating and Managing Records

3.1 Rules for Clean and Accurate Records

Search first. Before users create a new record for a person or non-person, users must conduct a complete ID and name search to make sure that person or non-person has not already been entered in the Banner database. Each user must conduct a thorough search to prevent entering a duplicate record. Duplicate records create problems in multiple parts of the system and take many hours of staff time to locate, merge data, and remove. Refer to Appendix A for the correct search method.

Never Use During Entry:

- the percent sign (%) is used as a wildcard character in Oracle SQL queries.

- the left single quote (‘), also known as the grave accent. The IRS and the Social Security Administration forbid the use of this character in a name.

- Abbreviations: If there is enough space, do not use abbreviations. When an abbreviation is required, use the abbreviated form set out in these Data Standards. If you cannot find a needed abbreviation in these Standards, contact the University's Data Steward for the proper abbreviation to use.

Follow data entry rules. Some data fields have specific data entry rules. See that data element's specific section for its data entry rules. Except where specifically noted, avoid abbreviations.

Punctuation: With few exceptions, do not use punctuation in the name fields or the address fields. Hyphens, periods (e.g., St. John), and apostrophes (right single quote marks or acute accent marks only) may be used in the name fields when part of the legal name. However, do not use periods after a first or middle initial. Further, you may use a slash or a hyphen in address fields when required for clarity. (See Name)
Standards and Address Standards for more information.)

## 3.2 Multiple PIDMs Management

A "multiple PIDM"--the duplication of the same person or entity in Banner tables--is a serious problem. The PIDM (Person IDentification Master) is the internally assigned system number that connects all the data that is associated with a Banner ID Number. A Banner ID number record can represent student, employee, vendor, etc.

Multiple PIDMs can occur for many reasons, including:

- failure to perform a complete search
- error keying in data in INB (Internet Native Banner)
- error keying in data over the web (Self-Service Banner)
- feeds to Banner from governmental agencies, testing agencies, any outside sources, etc.
- not entering social security number and birthdate for a person record

Purging multiple PIDM's or "containing" (isolating) multiple PIDMs that cannot legally be purged, requires a planned and coordinated effort. This effort must be coordinated among the functional areas which are stewards of the Banner modules, particularly Student, Financial Aid, and Accounts Receivable. When multiple PIDM records cannot be purged, they will be "contained" so further use of the unusable ID will be more difficult to locate and use.

When multiple PIDMs (via their associated external IDs) are identified, ITS must be notified to properly handle the incorrect ID. The concerned departments, along with ITS, will coordinate the effort to determine if there are actual multiple records. If so, the contacts in each functional area will coordinate the cleanup effort and begin the process that includes:

- adding "-DONOTUSE" at the end of the last name field to alert users to not make any additional data entries to the record, and deleting any 'prior name' records that would otherwise enable location of the contained ID via a normal name search.
- disabling the PIN of the contained ID so it cannot be accessed over the web.
- moving the data from the duplicate (in-error) record to the correct record as required.
• deleting all unneeded data from the contained ID (such as addresses, email addresses, and biographical data).

ITS may then, at its discretion, entirely delete the contained PIDM, if it does not have undeletable data associated with it (e.g. A/R transactions).

### 3.3 Offices Authorized to Create Records

The following departments/offices shall have the ability to create new records as specified below and any required prerequisite records (e.g., General Person records).

<table>
<thead>
<tr>
<th>Area of Responsibility</th>
<th>Office</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee – created in the IRIS system then cross-walked to Banner by ITS</td>
<td>Human Resources</td>
</tr>
<tr>
<td>Faculty – created in the IRIS system the cross-walked to Banner by ITS</td>
<td>Human Resources</td>
</tr>
<tr>
<td>Financial Aid</td>
<td>Financial Aid and Scholarships</td>
</tr>
<tr>
<td>Prospect / Applicant / Student</td>
<td>All University Admitting Offices (Graduate and Undergraduate)</td>
</tr>
<tr>
<td>Non – person (e.g. donors, venders and lenders)</td>
<td>Business Affairs, Development, Financial Aid and Scholarships</td>
</tr>
</tbody>
</table>

The absolute minimum data necessary to create a new entity in Banner is a name. However, to meet University data needs and to ensure data integrity and accurate record-keeping, the following data should also be captured where pertinent to the type of record being created:

- Address and/or telephone number
- Gender
- Birth date
- Social security number

At various points in the building of new records (new employees, potential donors, potential students), some of this data may not be available. NOTE: Employee information will always include birth date, Social Security Number, address and/ or telephone number, gender and ethnicity. If none of the information noted above is available, data entry personnel should verify with a supervisor whether it is appropriate to add the new entity.
4.0 Data Entry Standards

4.1 Identification Numbers

Perform a complete search before entering a new person or non-person in Banner. There should be only one record for each entity. Any entities that are in Banner more than once must go through the "multiple PIDM" process. A search may take several minutes to perform, but correcting a multiple PIDM may take several weeks to complete.

See Appendix A - Name/ID Search Methods for information on how to complete a search by ID or name.

The identification number is a unique, nine-digit number given to each person or non-person entity (e.g., an organization or business) that is considered to be a constituent of the University.

In keeping with the spirit of the Buckley Amendment and the current trends in privacy cases and legislation, this identification number is not to be the person's Social Security number nor an organization's tax or employer identification number. Social Security, tax, or employer identification numbers should be entered in the SSN/SIN/TIN field.

When adding a person or non-person to Banner, use the system-generated ID whose first characters will be “960 or 000.”

4.2 Name Standards

Enter names in mixed case so that when a name is printed on correspondence, it looks contemporary and professional.

Person Names

Only one record and one identifier should exist for each person. It is important to search the database thoroughly before adding a new person to Banner to ensure the individual does not already exist. (See Appendix A -
**Name/ID Search Methods**

**Formatting**

Enter the first, middle, and last names exactly as the person has indicated. If given the full middle name, enter the full middle name. Do not change a full name to an initial. Always use normal mixed case letters for names. The objective is to print the name on mailings, correspondence, etc., just as the "customer" wants it to be printed. The preferred name field is used when the person indicates they wish to be called by a name other than their given name. Example: If James’ preferred name is Jimmy, this will be placed in the preferred name field to personalize correspondence. Typically, the preferred name is limited to derivatives of the first name.

**Note:** Enter the name as it appears on a Social Security card, court order, marriage license, driver's license, or passport.

**Case**

If the person has written all uppercase letters, enter the normal mixed case letters. If the person’s name starts with a lowercase letter, enter the first letter in lowercase (e.g., duBois). For employees, the name is entered as it appears on the Social Security Card or court documents denoting name changes.

**Initials**

Do not use an initial for the first name unless the name appears as such on accepted name documentation. In those instances in which a single character or initial is designated as the first name and is followed by a middle name, enter the single character or initial in the first name field with no period and the middle name in the middle name field.

**Punctuation**

Enter hyphens, apostrophes, and periods (e.g., St. John Rivers) only when they are part of the legal name. Never use the left single quote or grave accent (`). Do not enter punctuation where there is none. Do not enter spaces before or after hyphens in hyphenated names. In the following examples, any could be correct:

- O'Donnell, Odonnell
- Dell'Acqua, DellAcqua, Dellacqua
- Jones-Smith
- Al-Hassan, AlHassan, al-Hassan, alHassan, al Hassan
- St.Denis, St Denis, StDenis, St-Denis, SaintDenis, Saint-Denis, Saint Denis
Spaces

Spacing in names is based on the legal name. Maintain the spaces indicated by individuals (e.g., Van Canneyt, de la Cruz).

Long Names

If a name is longer than the field allows, leave off the excess characters at the end of the name. Do not try to abbreviate in any other way.

Legal Name

The legal name field should only be populated when the separate first, middle, or last name field is too short to store the complete name. In these cases only, enter the complete name in this field in first-middle-last name format. Note that this field is not used by any system processes. The data in this field merely provides a place in the system to store the full name for someone whose name will not fit completely in the standard name fields.

When you perform a name change for an individual whose full name is stored in the Legal Name field, you must also update the Legal Name field. If the new name fits in the standard fields, remove the information in the Legal Name field.

Note: In Banner, the Legal Name field is a single, free-format field that is not automatically updated if the person officially changes his/her name. You cannot use the Legal Name field as the basis for database searches.

Multiple First, Middle, or Last Names

When entering names of users with multiple first, middle, and/or last names, enter the names as identified on a Social Security card, court order, marriage license, driver's license, or passport. For example: When entering Shi Su Wei Liu, appropriate documentation must be used to determine the first (Shi), middle (Su Wei), and last (Liu) names. Multiple names may be entered into a single field. When no documentation is present which breaks down the name as 1st, Middle, Last, enter Gwei Hung Herb Tsai as Gwei (1st); Hung Herb (Middle) Tsai (last). The standard would be to put multiple names in middle name field.

Preferred Name

Offices may enter data in this field when an individual uses a preferred name which is different than his legal first name. For example, if Elizabeth Anne Smith goes by Liz, you may enter "Liz" in the preferred name field. For employees, IRIS lists “Known As” using last name, then the employee’s nickname. Using the example listed above, the name is entered in IRIS as
Smith, Liz.  ITS must separate the preferred named for the IRIS-to-Banner crosswalk.

Prefix or Title

Do not enter prefixes or titles in any of the name fields. Enter the standard abbreviation for the prefix or title in mixed case with no punctuation in the prefix field. It is UT Martin’s practice to not enter a marital status unless requested by the individual. For employees, IRIS has the selection of Mr., Mrs., Ms., Miss and Dr. Employees indicate their preferred title on the Personal Data Form. If no preference is indicated, males are entered with Mr. and females are entered with Ms.

The Prefix default for UT Martin is Mr. or Ms.

Suffix

Do not enter suffixes in any of the name fields. Enter suffixes in mixed case with no punctuation in the suffix field.

<table>
<thead>
<tr>
<th>Description</th>
<th>Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Esquire</td>
<td>Esq</td>
</tr>
<tr>
<td>Fifth</td>
<td>V</td>
</tr>
<tr>
<td>Fourth</td>
<td>IV</td>
</tr>
<tr>
<td>Junior</td>
<td>Jr</td>
</tr>
<tr>
<td>Second</td>
<td>II</td>
</tr>
<tr>
<td>Senior</td>
<td>Sr</td>
</tr>
<tr>
<td>Third</td>
<td>III</td>
</tr>
<tr>
<td>USA (Ret)</td>
<td>Ret</td>
</tr>
<tr>
<td>US Army</td>
<td>USA</td>
</tr>
<tr>
<td>US Air Force</td>
<td>USAF</td>
</tr>
<tr>
<td>US Marine Corps</td>
<td>USMC</td>
</tr>
<tr>
<td>US Navy</td>
<td>USN</td>
</tr>
</tbody>
</table>

Enter both a prefix and suffix when the person has an inherited suffix (e.g., Mr John Doe Jr). Both a prefix and suffix can be used for individuals who are in the military, are retired military, or are in religious orders (e.g., Gen Frank Smith USA (Ret)). NOTE: IRIS does not have an option for military prefixes and suffixes.

Do not enter a suffix indicating an academic or medical degree if you have entered a prefix. As a general rule, individuals are addressed in a non-professional context. Therefore, the prefix and not the professional suffix will be used. For example, do not enter a prefix of Dr and a suffix of MD; rather, enter the prefix only (Dr James Smith, not Dr James Smith, MD.)
Do not enter academic degrees or professional designations as a suffix unless specifically asked by the individual.

**Alternate Names**

Alternate names are other names that an individual would be known by (or has been known by). Alternate names may include: maiden names, married names, adopted names, etc. Alternate names may also be stored in the system to support certain system processes such as awarding degrees, production of transcripts, etc. Any name change must be supported by documentation such as birth certificate, marriage license, or driver’s license. It is also recommended that Alternate ID be used for people with multiple names. It allows us to use the SSN and have it pull back all names. This is done under GUIALTJ (alternate ID search).

Employees may request name changes by submitting a W-4 or Personal data Form update. Employees must submit court documentation or a marriage license when requesting a name change. When received, employees should also submit a Social Security card with the new name change.

The following offices may process name changes for the specified populations. All the roles pertinent to the record must be identified. When roles impacting other offices are present, the required documentation must be collected and forwarded to the other offices along with notification that the change has been made.

<table>
<thead>
<tr>
<th>Population</th>
<th>Office to Perform Name Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alumni</td>
<td>University Advancement, Alumni Affairs</td>
</tr>
<tr>
<td>Donors (non-student, non-employee, non-vendor)</td>
<td>University Advancement, Development</td>
</tr>
<tr>
<td>Employees</td>
<td>Human Resources</td>
</tr>
<tr>
<td>Prospective students</td>
<td>Admissions</td>
</tr>
<tr>
<td>Students</td>
<td>Academic Records</td>
</tr>
<tr>
<td>Vendors (non-student, non-employee)</td>
<td>Finance, Grants &amp; Contracts, Procurement</td>
</tr>
</tbody>
</table>

Before a name change or alternate name is entered in Banner, the previous name of the individual or vendor must be identified with a name type. Name types are validated against table GTVNTYP:

**Banner Table: Name Type Code**
Non-Person (Vendor) Names

Vendors can be companies, organizations, or entities doing business with the University in a professional capacity. They could include suppliers, granting agencies, banks, institutions, government entities, or individuals. Vendors and non-student, non-employee individuals will be entered into the non-person name information field through the SPAIDEN form.

Only one record and one identifier should exist for each non-person/vendor. It is important that you search the database thoroughly before adding a new non-person to Banner to ensure that the entity or individual does not already exist.

Always enter non-person names in the non-person name field as listed on an invoice or other company document. Spaces are permitted between multiple names.

Note: Periods are permissible in non-person names.

If an article (e.g., a, an, or the) is used as an adjective within the full legal name on a non-person entry, include it when entering the name in Banner. If a non-person name begins with the word "The" as appearing on the company's letterhead, invoice, or bidder application, include it when entering the name.

Examples:

- ABC Trucking
- Diamond Life Insurance
- Smith King & Jones Inc
- J F Kennedy Co
- First National Bank
- The Copy Store

Abbreviations

In general, do not abbreviate company names. However, only use abbreviations when a company is more widely known by its abbreviated name than its full name (e.g., IBM, HP) or when space limitation requires the use of abbreviations.

Doing Business As…

If the non-person entity has a "doing business as…" (DBA) name that is separate from its legal name, enter the DBA name in the DBA field and not as any part of the address. For data entry purposes, the same
formatting rules apply to the DBA name as to the legal name.

Add alternate names on the "Alternate ID" tab.

Case

Enter all information using mixed case and standard capitalization. Never use all uppercase or all lowercase letters, except for acronyms.

Punctuation

Do not add punctuation where there is none. Periods may be used when required as part of the company's name. Examples:

<table>
<thead>
<tr>
<th>If the organization is:</th>
<th>Enter:</th>
</tr>
</thead>
<tbody>
<tr>
<td>R.J. Reynolds Co.</td>
<td>R J Reynolds Co</td>
</tr>
<tr>
<td>F. &amp; F. Securities</td>
<td>F &amp; F Securities</td>
</tr>
<tr>
<td>Amazon.com</td>
<td>Amazon.com</td>
</tr>
</tbody>
</table>

You may use apostrophes, but do not use spaces before or after the apostrophe unless the apostrophe comes at the end of a word. For example:

- John's Plumbing Supply
- Four Wives' Club

Do not use commas between names. You may use hyphens or slashes to separate names, but do not use spaces before or after the hyphen or slash.

Use the ampersand only when it is part of a formal name. Use "and" in all other cases.

Acronyms

If a company is recognized by its acronym, use the acronym when entering its record (e.g., IBM, SCT, ITT, AT&T). Do not use a space between the letters of an acronym.

Numerals as Part of a Name

If a numeral is part of the official corporate name, enter the numeral rather than spelling out the number (e.g., 21st Century Productions).
4.3 Address Standards

University-wide conventions are critical for shared data such as addresses and the purposes for which the information is entered should be considered. For example, units with marketing responsibility, such as Development and Admissions, must be able to produce individualized correspondence conforming to formal addressing rules. Units such as Financial Aid and Accounts Payable may have less stringent formatting requirements but should still follow the standards set forth here. These standards must balance four considerations:

- Banner system requirements
- Accepted standards for formal communications
- US Postal Service guidelines
- International address requirements


The guidelines expressed herein are designed to convey the minimum standard requirements to enhance the processing and delivery of mail, reduce instances of "undeliverable" mail, and position the University to obtain the most advantageous postal rates.

While data may be conditioned (or reformatted) on output, it is the intention that addresses be entered exactly as they will print on correspondence, reports, etc. Accurate, consistent address data entry is vital. Given these considerations, the following address data entry standards are recommended.

**Address Types**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>APPL</td>
<td>Applicant to be reviewed</td>
</tr>
<tr>
<td>AVFY</td>
<td>Submitted via address verification</td>
</tr>
</tbody>
</table>
### Street Standards

#### Case

Enter all information in mixed case; never use all uppercase or all lowercase letters.

#### Punctuation

The street address fields have a maximum length of 75 characters. Street names should be spelled out in their entirety whenever possible.

**Note:** Street designators such as "road", "street", "boulevard", etc. may not be abbreviated (per guidelines from the Chancellor) unless necessary due to space restraints. See the topic, [Street Designators and Postal Abbreviations](#).

Because of the length restriction, do not take up space with needless punctuation such as periods following abbreviations. Never use apostrophes and commas. However, you may use slashes and hyphens, if necessary, for clarity.

#### Address Lines

Banner provides three 75-character lines for street address; however only 30 characters will print on an envelope or label. **Do not** enter city, state, and zip code data on any of these three address lines for US addresses: enter these on the City-State-Zip line. Do not leave blank lines between street lines.

**Note:** Although Banner does provide three Address Lines, three-line street addresses cause a problem when printing one inch labels since the completed address could be five to six lines once other lines—Name, the optional "In Care of", and City-State-Zip are added. Therefore, make every effort to enter the address using two lines only.

**Examples:**

- If there is an apartment number, enter it on the second line. Only the house number and street name should be on the first line:

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>123456789012345678901234567890</td>
<td>123 Main Street</td>
<td></td>
</tr>
</tbody>
</table>

| MAPR | MA or PR address to be reviewed |
| POST | Post office change of address notice |
| WEB | Originated from Banner Web |
• If it is necessary to send communications to the attention of a particular person, enter "Attn" followed by a space and then the name on Address Line 1:

1 2 3
123456789012345678901234567890

Banner St Addr Ln 1: Attn Mary Jones
Banner St Addr Ln 2: 3535 Prien Lake Parkway
Banner St Addr Ln 3: [not used in this example]

Note: If entering both a PO Box and a street address, consider the PO Box the mailing address (MA), and the street address as the permanent address (PR) and enter into Banner accordingly.

Street Number

For addresses in which the street name is a number from 1-10, spell out the number. For numbers 11 and above, use the number itself with the appropriate suffix (i.e., the "nd" in 42nd). For example:

• One First Avenue
• Two 68th Street
• 123 Fifth Avenue
• 11 42nd Street

Street Name

Where the 75-character field length allows, type the street name in full. If abbreviations are necessary, use the standard postal service abbreviation for a street designator rather than abbreviating the street name. If you must abbreviate the street name, make sure the end result is not confusing. For example, do not abbreviate "Saint" as "St" in street names as this could easily be confused with the standard abbreviation for street.

For addresses in which the street name is a number, enter the street name as supplied by the person. Numbered streets are usually entered as a number with the appropriate suffix, but you may spell them out if they are supplied that way. For example, "955 73rd Street" or "100 Fifth Avenue."

Street Designators and Postal Abbreviations

The preferred format is to spell out all address suffixes or street designators such as Road, Street, Avenue, etc. However, Postal Service standard abbreviations are acceptable, where the street name is too long, making it
necessary to abbreviate the street designator.

For a list of acceptable abbreviations, refer to: Street Designators and Postal Abbreviations. 

Secondary Address Unit Indicators and Postal Abbreviations

Second address units should always be entered on the second line of the address field.

If you have space, spell out secondary address identifiers or unit designators. However, if space is a problem, you may use the following abbreviations:

<table>
<thead>
<tr>
<th>Description</th>
<th>Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apartment</td>
<td>Apt</td>
</tr>
<tr>
<td>Basement</td>
<td>Bsmt</td>
</tr>
<tr>
<td>Building</td>
<td>Bldg</td>
</tr>
<tr>
<td>Department</td>
<td>Dept</td>
</tr>
<tr>
<td>Floor</td>
<td>Fl</td>
</tr>
<tr>
<td>Front</td>
<td>Fnt</td>
</tr>
<tr>
<td>Key</td>
<td>Key</td>
</tr>
<tr>
<td>Lobby</td>
<td>Lbby</td>
</tr>
<tr>
<td>Number</td>
<td>No</td>
</tr>
<tr>
<td>Penthouse</td>
<td>Ph</td>
</tr>
<tr>
<td>Pier</td>
<td>Pier</td>
</tr>
<tr>
<td>Rear</td>
<td>Rear</td>
</tr>
<tr>
<td>Room</td>
<td>Rm</td>
</tr>
<tr>
<td>Side</td>
<td>Side</td>
</tr>
<tr>
<td>Slip</td>
<td>Slip</td>
</tr>
<tr>
<td>Space</td>
<td>Spc</td>
</tr>
<tr>
<td>Suite</td>
<td>Ste</td>
</tr>
<tr>
<td>Tower</td>
<td>Twr</td>
</tr>
<tr>
<td>Trailer</td>
<td>Trlr</td>
</tr>
<tr>
<td>Unit</td>
<td>Unit</td>
</tr>
<tr>
<td>Upper</td>
<td>Uppr</td>
</tr>
</tbody>
</table>

Compass Directions and Postal Abbreviations

Always spell out compass directions (except for a double directional such as Southwest) unless space prohibits. If space is a problem use the standard abbreviations in the table below. For example:

- 234 Jackson Street North
1222 SW Morris Street

An exception to the above rule is when the street name itself is East, West, North, or South and includes a directional; the directional will be abbreviated without periods. For example:

15 N East River Road
867 N West End Avenue

<table>
<thead>
<tr>
<th>Description</th>
<th>Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>East</td>
<td>E</td>
</tr>
<tr>
<td>West</td>
<td>W</td>
</tr>
<tr>
<td>North</td>
<td>N</td>
</tr>
<tr>
<td>South</td>
<td>S</td>
</tr>
<tr>
<td>Northeast</td>
<td>NE</td>
</tr>
<tr>
<td>Northwest</td>
<td>NW</td>
</tr>
<tr>
<td>Southeast</td>
<td>SE</td>
</tr>
<tr>
<td>Southwest</td>
<td>SW</td>
</tr>
</tbody>
</table>

**Special Characters**

If you receive an address with just a number at the end of the street, assume this number to be an apartment number. Use the abbreviation "No" for number when necessary (e.g., Lodge No 123).

Use hyphens and slashes when needed for clarity or for designating fractions.

**Business/Organization Address Lines**

Follow the guidelines for business/organization address (non-person record) for all corporations, organizations, foundations, and vendors. The same general rules as described in the previous sections apply to these records.

**Remember**, for US addresses, City-State-Zip is entered on a separate City-State-Zip line, not in a street address line.

For example:

```
123456789012345678901234567890
Banner Bus Addr Ln 1: Skyline Towers Bldg Suite 100
Banner Bus Addr Ln 2: 365 Boylston Street
Banner Bus Addr Ln 3: [not used in this example]

Department or “In Care of…” for Business Addresses
```
When entering the business address for a person, type the department on Address Line 1, the business or firm name on Address Line 2, and the delivery data on Address Line 3. If the delivery data requires more than two lines, omit the department data. For example:

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>12345678901234567890</td>
<td>Banner Bus Addr Ln 1: Public Relations</td>
<td></td>
</tr>
<tr>
<td>Banner Bus Addr Ln 2: American Heart Association</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Banner Bus Addr Ln 3: 1660 Duke Street Suite 1234</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Do not enter corporate titles as part of an address. However, if "in care of" is required, abbreviate it as "c/o" and enter it on the first street address line. Do not use the percent sign (%) or spell out "in care of". For example:

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>12345678901234567890</td>
<td>Banner Bus Addr Ln 1: c/o Agnes Ann Trotter</td>
<td></td>
</tr>
<tr>
<td>Banner Bus Addr Ln 2: American Heart Association</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Banner Bus Addr Ln 3: 1660 Duke Street Suite 1234</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

City Standards

Always enter the city name in the city field. Enter it in mixed case; never use all uppercase or all lowercase letters. The field has a maximum length of 20 characters.

US cities will automatically be entered in the city field when the zip code is entered first in the zip code field. After entering the zip code, review the city information to see that it is accurate and conforms to the preferred standards. In some cases one zip code may be used for more than one town and the default city must be changed. The city field can be corrected after zip code information is entered.

The general rule is that city names will be spelled out. A standard exception is when the city name includes "St" for Saint and "Ft" for Fort; then, always use that format.

Compass directions in a city name are NEVER abbreviated (e.g., North Boston, South Bend, West Memphis).

When city names must be shortened, either leave out a word (often the word "the") or drop the necessary letters at the end of the name so it will fit the line. For example:
<table>
<thead>
<tr>
<th>For:</th>
<th>Use:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manchester-by-the-Sea</td>
<td>Manchester-by-Sea</td>
</tr>
<tr>
<td>Rancho Santa Margarita</td>
<td>Rancho Santa Margar</td>
</tr>
<tr>
<td>Truth or Consequences</td>
<td>Truth or Consequence</td>
</tr>
</tbody>
</table>

**Note:** Punctuation is allowed when it is part of the city name.

**State Standards**

The state field is used for US and Canadian Addresses only. The Banner State Code Table contains the two-letter standard code for: (1) US states and US territories, (2) US military destinations, and (3) Canadian provinces/territories:

**Banner Table: State Code**

**Note:** Use the States Codes Table and not the Nations Table for territories such as Guam, US Virgin Islands, etc.

**Military Destinations**  (Use the Banner State Code Table.)

Military addresses should be entered exactly as indicated. No abbreviations are changed when entering a military address. Military destinations are considered US addresses and have US zip codes. Enter the APO or AFO code in the city field. For example:

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

**Canadian Provinces/Territories**  (Use the Banner State Code Table.)

**County Standards**

All counties will automatically be populated in the county field after the zip code is entered in the zip code field.

**Zip Code Standards**

Zip codes must be entered for all US and Canadian addresses. Do **not** enter a zip code for an international address.

When the five-digit zip is entered, the program automatically edits the code against the zip code validation program and populates the correct city, county, and state names in those fields based on the information in the program. Once the program has validated and entered the information, city, county, state, and zip fields may be edited as needed. (Always check the city
name since a zip code may cross two cities and the default city from the validation table could be the wrong one.)

If the zip+4 information is available, enter it in the zip field. The hyphen must be used when entering the entire nine-digit ZIP code.

Note: The validation program will not work if values are already entered in the city or state fields. Likewise, the validation program will not work if the nine-digit zip code is entered first. Enter the five-digit zip code to validate the city and state fields. Then go back and add the hyphen and last four digits to the zip code.

Canadian Addresses

Canadian street addresses and city names follow the same guidelines used for entering US addresses.

Enter the province or territory in the state field using a two-letter code from the Banner State Code Table.

Enter the Canadian postal code in the zip/postal code field. The format is always a letter-number combination (e.g., B3C 4A7) with a space after the third character.

Enter the nation code for Canada (CA) in the nation code field so that the word CANADA is printed at the bottom of the address.

International Addresses (other than Canadian)

In general, international addresses follow most of the same guidelines used in entering US addresses. That is, all information should be in mixed case format; never use all uppercase or all lowercase letters. As much as possible, use the abbreviations and formats provided in the section about street address lines. If possible, keep the information on lines 1 and 2. Use abbreviations, if necessary, to get the address information to fit on a single line.

Hyphens, slashes, and periods are allowed. Add a slash between information when combining two short lines of address together in a single input line. This is sometimes necessary with addresses for Asian countries. When combining address lines, add the information from the lower line to the end of the information on the upper line.

Never use the pound (#) sign anywhere in the address: substitute "No" when needed. For example:

<table>
<thead>
<tr>
<th>We receive:</th>
<th>Correct format:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taihei Bldg. #401</td>
<td>Taihei Bldg 401</td>
</tr>
<tr>
<td>Eitai 2-1-5</td>
<td>Eitai 2-1-5 / Koto-ku</td>
</tr>
</tbody>
</table>
According to US post office guidelines, the following shows the order of information for the international address. (Note: The line numbers used for reference do not refer to Banner address lines, but the lines of the printed address.)

| Line 1: | Name of Addressee |
| Line 2: | Street Address or Post Office Box Number |
| Line 3: | City or Town name, other principal subdivision (e.g., province, state, county, etc.), and postal code (if known) |

**Note:** In some countries, the postal code may precede the city or town name.

| Line 4: | Country Name, spelled out in English, no abbreviations, in all uppercase. |

Do not enter the international postal code in the zip code field. For example:

Ms Joyce Browning  
2045 Royal Road  
London WIP 6HQ  
ENGLAND

Ms Joyce Browning  
2045 Royal Road  
06570 St Paul  
FRANCE

**Nation Standards**

The nation code field is used only for international addresses. Always leave this field blank when entering a US zip code (includes entries for military
destinations and US territories, such as Puerto Rico, Guam and the US Virgin Islands).

According to Postal Service regulations, the name of the foreign country must be printed alone in all caps on the last line of the address for outgoing mail. In Banner this is accomplished by selecting the two-character alpha code/country name from the list in the nation code field table.

**Banner Table: Nation Code**

### Updating Addresses

When adding a subsequent address of the same type, end-date the prior address and check its "inactive" address box. Then add the new address. Do not change or delete a prior address unless correcting an initial entry error.

#### 4.4 Telephone Standards

**Telephone Types**

Enter all regional and local telephone numbers, including campus (CA) telephone numbers, using the ten-digit format. A telephone type distinguishes each telephone number entered in the Banner system:

**Banner Table: Telephone Type**

**Domestic Telephone Numbers**

The telephone number is presented in a three-field format:

- **Area Code** - The three-digit area code must be entered for all phone numbers.
- **Phone Number** - The seven-digit phone number entered with no hyphen.
- **Extension** - The extension number, if provided. Do not enter "EXT" or "X" in the field.

**North American Numbering Plan (NANP)**

This agreement, held among many North American countries (Mexico is not included) establishes a procedure for dialing international numbers in a way that is similar to traditional United States procedures (1 + area code). The country code for all NANP countries is 1. The following countries are considered to be a part of the NANP and can be dialed using 1+ the three digit area code. You can enter any phone numbers from NANP countries in
When adding a subsequent telephone number of the same type, end-date the prior telephone number and then add the new telephone number. Do not change or delete the prior telephone number unless correcting an initial entry error.

**International Telephone Numbers**

The international phone number field has a 16-character limit. Enter all three parts of an international number (*i.e.*, the country code, the city code without a leading zero, and the telephone number) in the international phone number field using no parentheses or hyphens. Do **not** enter the "011" standard code for international dialing.

For example, a telephone number in Japan, consisting of country code 81, city code 03, and telephone number of 7599311 would be entered as
8137599311. (Note that the leading zero for the city code was not entered.)

**Updating Telephone Numbers**

When adding a subsequent telephone number of the same type, end-date the prior telephone number and then add the new telephone number. Never change or delete the prior telephone number unless you are correcting an initial entry error.

---

**4.5 Standards for Various Shared Tables**

**College**

Refer to this table for the college codes used in the Student module:

| Banner Table: College Code |

**Dates**

**Calendar Dates**

Enter all dates in MMDDYYYY format:

- DD = the two-digit day of the month; use a preceding zero if the number is less than 10
- MM = the two-digit month—using a preceding zero if the number is less than 10
- YYYY = all four digits of the year

The Banner system will convert the entered dates to a DD-MM-YYYY format. Example:

<table>
<thead>
<tr>
<th>Date:</th>
<th>Your Entry:</th>
<th>Banner Converts to:</th>
</tr>
</thead>
</table>

**Date of Birth**

Enter the Date of Birth in MMDDYYYY format.

For employees, Human Resources will maintain this information in IRIS. For
students, the undergraduate and graduate admissions offices, Financial Aid and Scholarships, and the Office of Academic Records will maintain this information. For Donors, the University Advancement Office will maintain this information.

**Deceased Indicator**

Due to the sensitivity of this issue, prompt attention is important so future mailings from University offices are discontinued. Deceased status must be verified, when possible, through death certificate, obituary, or Social Security Death Index (SSDI). (The link to a SSDI search is: [http://ssdi.rootsweb.com/](http://ssdi.rootsweb.com/))

For employees and retirees, Human Resources will enter this information in IRIS. Updates and changes are included in the nightly referential file. For students, the Academic Records Office will enter this information. For applicants and recruits, the Admitting Offices will enter this information. For Advancement constituents (who are not current students, current employees, or retirees), University Advancement will enter this information.

**Deceased Date**

The same office setting the Deceased indicator should enter the date, if known. If the date is not known, leave this field blank. The "date marker" date should not be used since no cleanup is required for this field.

**Degrees**

Degrees include those awarded by UT Martin and those captured by UT Martin for faculty, staff, donors, and students:

<table>
<thead>
<tr>
<th>Banner Table: Degree Code</th>
</tr>
</thead>
</table>

**Note:** HR has BSE as a second value for Bachelor of Science in Education. Students and Alumni have BSE for Bachelor of Science in Engineering, which HR also has as a value. Therefore, 246 (BSE) should be converted as BSED.

HR has BST as Bachelor of Science in Teaching and Bachelor of Science in Technology. Students and Alumni have BST as Bachelor of Science in Technology. Therefore, 266 (BST) should be converted as BSTE.

Also:

- 200 (B ARCH) should be converted as BARC.
- 226 (B MUS) should be converted as BM.
- 228 (B M E) should be converted as BMED.
- 300 (M ARCH) should be converted as MARC.
- 320 (M MUS) and 322 (MM) should be converted as MMU.
- 326 (M M E) should be converted as MMED.
- 328 (M PHIL) should be converted as MPHI.
- 608 (PHARM D) should be converted as DP.
- 699 (PROF-OTH) should be converted as PR-O.

**Degree Award Category Code**

According to proto-type documentation, all the following are Tennessee Board of Trustees system required and are to remain as delivered:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>Elementary School Program</td>
</tr>
<tr>
<td>12</td>
<td>Junior High School Program</td>
</tr>
<tr>
<td>13</td>
<td>High School Program</td>
</tr>
<tr>
<td>16</td>
<td>1 Year College</td>
</tr>
<tr>
<td>17</td>
<td>2 Year College</td>
</tr>
<tr>
<td>18</td>
<td>3 Year College</td>
</tr>
<tr>
<td>19</td>
<td>4 Year College</td>
</tr>
<tr>
<td>21</td>
<td>Certificate &lt; 1 year</td>
</tr>
<tr>
<td>22</td>
<td>Certificate = 1 year &lt; 2 years</td>
</tr>
<tr>
<td>23</td>
<td>Associate Degree</td>
</tr>
<tr>
<td>24</td>
<td>Certificate &gt; or = 2 years &lt; 4 years</td>
</tr>
<tr>
<td>25</td>
<td>Bachelors Degree</td>
</tr>
<tr>
<td>26</td>
<td>Post Secondary Certificate/Diploma &gt; two years and &lt; four years</td>
</tr>
<tr>
<td>31</td>
<td>First-Professional Degree</td>
</tr>
<tr>
<td>32</td>
<td>Post-Professional Degree</td>
</tr>
<tr>
<td>41</td>
<td>Graduate Certificate</td>
</tr>
<tr>
<td>42</td>
<td>Master's Degree</td>
</tr>
<tr>
<td>43</td>
<td>Educational Specialist Degree</td>
</tr>
<tr>
<td>44</td>
<td>Doctoral Degree</td>
</tr>
<tr>
<td>45</td>
<td>Post-Doctoral Award</td>
</tr>
<tr>
<td>46</td>
<td>Post-Master's Degree</td>
</tr>
</tbody>
</table>

**Degree Level**

Per proto-type documentation, Degree Level is used in conjunction with STVDEGC:

Banner Table: [Degree Level Code](#)

**Email Addresses**
The following guidelines apply for the use of email addresses at UT Martin.

All official UT Martin email communication to students and employees must be sent to the individual's UT Martin email address. The Office of Admissions may send all email correspondence to the student’s home email address that is provided on the application.

The official UT Martin email address will be systematically entered and updated in Banner by ITS. Valid email address types are located in:

<table>
<thead>
<tr>
<th>Banner Table: Email Address Type</th>
<th></th>
</tr>
</thead>
</table>

**Ethnicity**

Ethnicity must be entered for all employees and students who are US citizens or US permanent residents in order to meet regulatory requirements. You can find valid ethnicity codes in:

<table>
<thead>
<tr>
<th>Banner Table: Ethnicity Code</th>
<th></th>
</tr>
</thead>
</table>

In IRIS, ethnicity is either Hispanic or Latino OR Not Hispanic or Latino.

**Gender**

All UT Martin employees must be classified as female or male. Also, having a valid gender code on all students facilitates record searches and analyses. You can find valid UT Martin gender codes in:

<table>
<thead>
<tr>
<th>Banner Table: Gender Code</th>
<th></th>
</tr>
</thead>
</table>

**Legacy**

Legacy information is reported on the SPAPERS screen in Banner if provided on the application:

<table>
<thead>
<tr>
<th>Banner Table: Legacy Code</th>
<th></th>
</tr>
</thead>
</table>

**Majors/Minors/Concentrations**

For valid codes see:

<table>
<thead>
<tr>
<th>Banner Table: Majors/Minors/Concentrations</th>
<th></th>
</tr>
</thead>
</table>

**Marital Status**

When needed by Financial Aid and Scholarships, these codes will be used:
Human Resources uses only Married or Single.

**Relationship**

The Data Standards Team determined the following values based on items in the legacy systems.

**Religion**

Religious affiliation is collected by the Office of Admissions. You can find valid UT Martin codes in:

**Social Security Number**

The following populations must have a social security number on file in the system for identification purposes, federal reporting purposes, financial aid purposes, etc. It will not be used as a record key.

<table>
<thead>
<tr>
<th>Audience</th>
<th>SSN Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>All UT Martin employees</td>
<td>Must have a social security number listed.</td>
</tr>
<tr>
<td>UT Martin students who receive Financial Aid</td>
<td>Must have a social security number listed.</td>
</tr>
<tr>
<td>UT Martin students who do not receive Financial Aid</td>
<td>Note: The National Student Clearinghouse will not process student records with assigned or blank SSNs for either enrollment or degree verification purposes.</td>
</tr>
<tr>
<td>Vendors that must receive a 1099 Form</td>
<td>Must have their social security number, tax ID, or employer ID number listed.</td>
</tr>
<tr>
<td>International Students</td>
<td>Must have a social security number if they plan to work or receive any type of financial aid.</td>
</tr>
</tbody>
</table>

Enter the 9-digit number with no embedded dashes or spaces. **Do not** enter
"000000000" or "999999999" or any other type of placeholder for records with no social security number.

The same offices responsible for name changes will also be responsible for social security number changes and documentation.

**Veteran Information**

Veteran Services, located within the Office of Financial Aid and Scholarships, will enter and maintain all "veterans" data for students receiving veterans’ benefits. Human Resources will also capture Veteran data on employees.

The Veteran File Number is the principal veteran ID number for the student and is typically the student's social security number. For spouses and dependents, the Veteran File number may be the veteran’s social security number with an additional character at the end to indicate spouse or dependent.

Refer to:

*[Banner Table: Veteran Code]*

**International Information**

**Citizenship**

Citizenship is required information for students and employees at The University of Tennessee at Martin. Additional information, such as country of citizenship and visa status, is required for any person who is not a citizen of the United States. The following information is entered using SPAPERS:

<table>
<thead>
<tr>
<th>Citizenship status</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. Citizen</td>
<td>1</td>
</tr>
<tr>
<td>Non U.S. Citizens</td>
<td>2</td>
</tr>
<tr>
<td>Resident Alien</td>
<td>3 (select code 2 in SAADMA to indicate ‘Residency’. )</td>
</tr>
</tbody>
</table>

**Country of Citizenship**

Using SOASUPL, select ‘Admission Nation’ from the table, then select the ‘Birth Nation’ from the table to enter the student’s country of citizenship.
VISA

Visa status is maintained for all non-US citizens. Visa status for students is established and maintained throughout the career of the student by the Office of Admissions. Visa status for non-student employees is maintained by Human Resources.

VISA codes are validated against table STVVTYP in Banner:

| Banner Table: VISA Code |
5.0 Data Policies and Procedures

5.1 Name Change Form

A Student’s name will be changed on all their academic records once they present the following:

- A signed, written request for name change
- A copy of their birth certificate, marriage license, or social security card with new name.

University employees must also visit the Office of Human Resources, 112 Hall Moody Administration Building to make changes to their personnel files. Changes made to academic records will not update employee files.

5.2 Address and Telephone Number Changes

Students may have their address and telephone number changed by submitting an address change through the “address verification hold” in Banner. Students may also come into the Office of Academic Records, 103 Hall Moody Administration Building to complete a change of address form.

5.3 Social Security Number Change Policy

Students must submit a copy of their official social security card showing the correct number to the Office of Academic Records to have their social security number changed.
5.4 Changing Data Standards Manual

The Data Standards Committee will review the manual annually and make any changes as appropriate. The ITS Banner Group Graduate Assistant is responsible for executing these changes.

Appendix

APPENDIX A – Creating New Student Records

USE SRAQUIK
1. Click on the pull down arrow beside the ID field. Double click on Person Search (SOAIDEN) or click F9 to bring up the search screen.
2. The % is a “ wildcard”. It means “give the information requested plus everything that comes after it”.
3. Search by last name with the % sign at the end and first name using only first two letters with % sign, then click F8.
4. Searching with only the first two letters and the % will pick up most variations. Such as Jeni instead of Jennifer, Marianne instead of Mary Ann for example.
5. If a match is found, compare some personal identifier such as the birthday if available.
6. If not found clear the search by clicking F7 each time. Next search by last name, plus the first two characters of the first name in the Middle Name field
7. If not found, clear the search (F7) and search by last name plus the first two characters of the Middle Name in the First Name field.
8. If still not found, that person does not exist in Banner.

Note: There may be 2 or 3 records for the same person but as long as these correspond to the same ID number that is okay. Ignore records with 00xxx number.

Are there are several with the same name, maybe even initial or birthday or still uncertain? Instead of looking up each ID number individually, type in the exact name (no % sign). Then across the top of the screen under Query header access - “Count hits”. Only the first person will be displayed, click F8 to see others and also see addresses; arrow down and try to match an address or town if possible.

If records contain the same name or same town for example, ascertain whether or not it is the same person using the following method: Double click on the possible match, then click Control + Page Down to display additional data to see if the person is indeed a match. Use the tabs to see high school, grad year and birth date. The type of data visible will depend on which screen searched from i.e. SAADSMS, SRAQUIK, etc.

If no match is found, click the black X twice to get back to the SRAQUIK screen or simply “ROLLBACK” in SPAIDEN. Click ‘Generate ID’ on right-hand side of the screen. This opens up the GOAMTCH screen where
most data entry can be done. The FIRST time data is entered, the Matching Source must be selected. Use the pull down arrow and select Admissions or the source designated to your area and click okay.

**Data Entry on the GOAMTCH screen.**
On this screen, the final student record is being created so the address format and spelling is crucial. The TAB key is used to move between fields.

Enter the full name in upper and lower case. Click TAB. MA will automatically fill in for the Address type.
1. Type in street address following the Address Standards in this manual.
2. Do not manually type in the city and state instead, click TAB and city, state and county automatically appear. If you manually type the data the county code will not be available.
3. If there is a Social Security Number (SSN), TAB to the SSN field; otherwise TAB past it. SSNs must be entered without dashes. Make sure the SSN is entered precisely. If the SSN is illegible do not guess, leave the field blank.
4. TAB to enter the birth date.
5. TAB to gender. If the gender is known type in F or M – the text will auto fill.
6. TAB to telephone type. The default is MA which should be used unless the student indicated it is a cell phone – in that case use CP.
7. TAB to telephone number. The first block is area code and the cursor automatically goes to the next block when information is entered. Enter without dashes. The last block is for an extension number and is very rarely used. (If the prospect has more than one phone number there will be an opportunity to enter it later).
8. TAB to the email type field. HO will be filled in automatically.
9. TAB to the email field and enter the email in the proper format.
10. Click F10 to save the data.

Clicking F10 causes the system to search to see if the data entered is already in the database. This is the only screen where F10 is used for searching and not saving.

**Now what?**

**If no match is found:** a box will popup asking if the person should be created as new? Select yes. After a couple of seconds another box will pop up, indicating that a new record has been built and providing a student ID number. Record this number. The person’s record where additional fields are completed will automatically pop up.

**If a match was found:**
There are two types of matches that may be returned: Potential and Match.

If the Match tab is highlighted the system will display the person that perfectly matches based on certain information that you provided. (not all data such as address is used to match). The “perfect” match will display under the Match tab. In order to see the address, email or telephone numbers on this perfect match, use the pull down under that area. The only reason someone would appear here is because they were missed in the initial search.

**Even though someone appears under the match screen it may not be a match because** the system can also display other really close matches under the potential match screen. Check to see the information under the potential match screen also.
If there is no one that the system thinks is a perfect match, the **Potential Match** tab will be highlighted; arrow down to the match. Be aware if the social security number belongs to someone else their name will be displayed among the names that are similar.

With either tab (match or potential) highlighted, clicking on the **Details** button will retrieve additional information by double clicking on any of the options there. Examples are high school, recruit record, admissions application. This information can narrow the search considerably.

**NO MATCH?**
If a match was not found, click **Create New**. The process is the same as the Create New process above, record the ID number and click the black X to return to the SRAQUIK screen where additional student fields are completed.

**FOUND A MATCH?**
If the system **found a match** there are two options:

1. Select ID – does not replace any current information but will fill in any information not previously provided, example birthday etc.
2. Update ID – replaces the current information with the data provided. Example: If the address entered is different than what is found on the match screen, Update will use the new address.

Highlight the student record to be matched, choose **Select ID or Update ID** and click it once; SRAQUIK will automatically pop up.

Click Control + Page Down. If a new record was created, this screen will be blank and the student’s data will need to be entered. If the student record already exists, be sure to update or verify the data.