



# Data Standards Manual

Version 2.1

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# Chapter 1: Policies and Definitions

## Data Standards Development and Maintenance

Accuracy in data entry is crucial to Grand Valley State University. The standardization of all data entered into the Banner system is essential to maintain data integrity. A Data Standards committee has been established to develop standards for data that is shared across the various components of the Banner system. During the implementation process this committee will serve to administer standards for the collection and maintenance of shared data.

### **Current Committee Mission**

The Data Standards committee will develop, document and maintain data standards for the General Person and other shared components of the Banner System. Responsibilities include determination of data ownership, definition of data maintenance standards/conventions, maintenance of tables of valid values, and formulation of measures to ensure the accuracy, validity and completeness of shared institutional data.

### **Current Committee Representation**

The committee includes representation from:

Human Resources  
Information Technology  
Registrar's Office  
Student Accounts  
Business and Finance  
Institutional Analysis

### **Committee Rules and Procedures**

All committee decisions require consensus. If consensus cannot be reached, the issue will be submitted to the Project Advisory Committee for further consideration. The committee will convene/consult on an as-needed basis.

### **User Responsibility**

Electronic data is owned by the institution and is a vital university asset. All institutional data, whether maintained in Banner or copied into other data systems including microcomputers, remains the property of the University and is governed by this policy statement. Users should exercise due care in using the institution's electronic information systems to protect data files from unauthorized use, disclosure, alteration, or destruction. Each person is responsible for all transactions occurring during the use of his or her username and password. Each Banner user is expected to go through training and comply with the Standards set forth in this manual.

## **Confidentiality**

The Family Education Rights and Privacy Act of 1974 (FERPA) sets forth requirements regarding the privacy of student records. FERPA governs: (1) release of student educational records maintained by an educational institution and (2) access to these records. The act requires the University to protect students' rights to limit disclosure of personally identifiable information contained in their education records. Disclosure includes the release, transfer or other communication of information to any party by any means, including oral, written or electronic. The University has identified specific information items as Directory Information, and as such may disclose that information under certain prescribed circumstances. Any information containing student or employee names and/or ID numbers must be destroyed prior to discarding.

In addition to FERPA, the University must comply with the privacy provision of the Health Insurance Portability and Accountability Act (HIPAA). The act requires the University to protect personal health information. All employees and students who have access to certain health related information through their work at the University or through clinical placements must be trained in HIPAA compliance and privacy procedures.

## **Data Owners**

A data owner is the director/officer of a GVSU office or department. The data owner may make data within his/her charge available to others for the use and support of the office or department's functions.

Before granting access to data, the data owner must be satisfied those protection requirements have been implemented and that a "need to know" is clearly demonstrated. By approving user access to GVSU data, the data owner consents to the use of that data within the normal business functions of administrative and academic offices or departments.

Data owners are responsible for the accuracy and completeness of data files in their areas. Misuse of inappropriate use by individuals will result in revocation of the user's access privileges. The data owners are also responsible for the maintenance and control of banner validation and rules tables. These tables, and processes related to their use, define how business is conducted at GVSU.

<b>Data Area</b>	<b>Data Owner(s)</b>
<b>Student system</b>	Registrar
<b>Financial aid sub-system</b>	Financial Aid Director
<b>Finance system</b>	Controller
<b>Human resources system</b>	AVP HRO - Controller

## Rules for Clean and Accurate Records

**Search first** Before you create a new record for a person or organization you MUST conduct an ID and name search to make sure that person or organization has not already been entered in the Banner database. Each user in every office MUST conduct a thorough search to prevent entering a duplicate record.

**Data changes** Make data changes ONLY when you have that authority and when you follow the procedures established by the data owner of that data you want to change.

**Remember** Some data fields have specific data entry rules. See the specific section within this document for data entry rules.

**Caution** The pound sign (#) and percent sign (%) should not be used in any data field because they may cause Oracle database errors.

## Person Role Definitions and Assignments

### **Definition of Person Roles:**

**Employee** = A person on payroll.

**Student** = A person actively enrolled in a university-sponsored class or course of study, or a prior student who is not an alumnus.

**Student Employee** = A person whose employment requires that he/she first be an active student.

**Student Prospect** = A person who has submitted an application to become a student, or a prospective student applicant.

**Vendor** = A business or a person who is paid for goods or services the university has received.

**Self Service Student** = Website where a student or faculty member goes to view and/or update information regarding financial aid, records and registration.

**Self Service Employee** = Website where an employee goes to view and/or update information regarding Human Resource records and payroll.

## General Person Update Responsibilities Role

	Name	SSN Name	Email	Bio-demo	Intl	Vet	Local Addr	Other Addr	Phone	SOS Contact
Employee	HR	HR	HR	HR	HR	HR	N/A	HR	HR	HR
Student	REG	N/A	REG	REG	REG	REG	HOUS	REG	REG	REG
Student Employee	ST EMP	ST EMP	REG	REG	REG	REG	HOUS	REG	REG	REG
Student Prospect	REG	N/A	REG	REG	REG	REG	N/A	REG	REG	REG
Vendor	PUR	PUR	PUR	PUR	PUR	PUR	N/A	PUR	PUR	N/A
Self Service Student	NO	NO	STDT	STDT	NO	NO	STDT*	STDT	STDT	STDT
Self Service Employee	NO	NO	EMP	EMP	NO	NO	EMP	EMP	EMP	EMP

\* If a student lives on campus, they will not be allowed to change their local (LO) or housing (HS) addresses.

### Maintenance Responsibility Table Key:

<b>REG</b>	Registrar/Admissions
<b>HR</b>	Human Resources
<b>PUR</b>	Purchasing
<b>HOUS</b>	Housing
<b>ST EMP</b>	Student Employment
<b>STDT</b>	Student
<b>EMP</b>	Employee
<b>NO</b>	No cannot update
<b>N/A</b>	Not Applicable

### Student, Vendor and Employee Name Changes

See Appendix A – Procedure for Name, Address, Telephone and Email Address Updates for information on who may make changes to these fields.

## Chapter 2: Data Standards

The standards contained in this chapter primarily govern two characteristics of specific data items: (1) the definition of the data item; (2) the format in which the data item is to be entered.

In addition, the policy may outline specific output formats for various types of data (for example, address labels). Parameters other than format may be specified in the policy (for example, the exclusion of deceased persons from address labels, the priority order of address types, etc.).

### Identification Number Standards

In keeping with the spirit of the Buckley Amendment and the current trends in privacy cases and legislation, this identification number is not the person's social security number/Tax ID. The social security number should be recorded in the SSN field within Banner.

Grand Valley will use the G number as the primary identification number for an individual or vendor. The nine-digit G number is generated by the Banner system at the time the General Person record is created. It has the format Gnnnnnnnn, where n is a numeral from 0 – 9. The G number assigned in Banner will be carried across auxiliary systems (for example, Housing and Parking) and used as the constituent's identification number on those systems as well.

An exception will be made for companies that are to be billed for a student's tuition. These companies will be given a non-person, third party billing ID that has the format CNTnnnnnn, where n is a numeral from 0 – 9. The third party billing office will manually set up and track these IDs.

An exception will be made for alternative loan lenders & guarantors. All lenders will have a 6 digit banner ID and all guarantors will have a 3 digit ID (instead of a "G" number). The Accounts Payable Office will manually set these IDs.

### Name Standards

All name information is typed in mixed (upper/lower) case format.

### Last Name

**Hyphens** may be used according to customer preference. This would be most common in instances where someone wants to hyphenate her maiden and married names, and in cases of cultural convention (for example, Al-Hamad). In instances where there are two last names that are un-hyphenated (for example,

Lynn Marie McNamara Blue), Marie would be input as the middle name and McNamara Blue would be input as the last name.

**Apostrophes** may be used in such names as O’Leary, O’Connor, etc.

**Periods are not used.** In an abbreviation of a person’s name ( L Marie Blue, Lynn M Blue) the initial should be placed in the appropriate field without the period.

**Commas, #, “, ”, () are never used.**

**Spacing** between syllables (that is, Mc, Mac, La, etc.) and the main portion of the name can be retained according to customer preference.

Examples:

Mc Donald  
Mac Phearson  
La Pine  
St John  
Van der Aaken  
De La Rosa

**Other – do not use title, prefixes and suffixes** in the Last Name field; examples Jr, III, Esq, PhD etc. should never be entered in Last Name field.

## Middle Name

**Hyphens** may be used.

**Apostrophes** may be used.

**Periods are not used.** In an abbreviation of a person’s name (L Marie Blue, Lynn M Blue) the initial should be placed in the appropriate field without the period.

**Commas, #, “, ”, () are never used.**

**Spacing** – spaces are permitted between multiple names.

**Other – Do NOT use** titles, prefixes, or suffixes in the Middle Name field.

## First Name

**Hyphens** may be used.

**Apostrophes** may be used.

**Periods are NOT used**, not even in an abbreviation in a person's name ( L Marie Blue, Lynn M Blue).

**Single Character First Names** should be entered without a period. In those cases where a single character is designated as the first name and then followed by a middle name, place the single character and the middle name in the first name field leaving the middle name field blank.

Examples:  
L Marie  
D Scott  
H Bart

Similarly, if a person has a double first name or chooses to be referred to by first and middle name, enter both names in the first name field.

Examples:  
Mary Ann Louise Baker (first name = Mary Ann; Middle = Louise)  
Susan Jane McNamara (first name = Susan Jane; Middle = blank)

**Commas, #, “, ”, (), are never used.**

**Spacing** – spaces are permitted for double first names ( Mary Ann, D Scott).

**Other – do NOT use** titles, prefixes, and suffixes in the First Name field.

Examples:  
Dr, Mr, Mrs The Honorable should never be used in First Name.

## Name Prefix

**Prefix is a free-text field.** Below is a table for a list of approved abbreviations for uncommon prefixes. Mr, Mrs, Ms, Miss. **Do not use punctuation in prefix. Default field based on gender (M=Mr, F=Ms).**

### Non-Military – Do not use punctuation

Description	Prefix Code
Associate	<b>Assoc</b>
Attorney	<b>Atty</b>
Bishop	<b>Bishop</b>
Brother	<b>Br (religious)</b>
Doctor	<b>Dr</b>
Father	<b>Fa (religious)</b>
Governor	<b>Gov</b>
Honorable	<b>Hon</b>
Married Woman	<b>Mrs</b>
Mister	<b>Mr</b>

Professor	<b>Prof</b>
Reverend	<b>Rev</b>
Single or Married Woman	<b>Ms</b>
Single Woman	<b>Miss</b>
Sister	<b>Sr (religious)</b>

**Military – Do not use punctuation**

Description	Prefix	Code		
	ARMY	NAVY	AIR FORCE	MARINE CORPS
Admiral	--	<b>ADM</b>	--	--
Brigadier General	<b>BG</b>	--	<b>Brig Gen</b>	<b>BGen</b>
Captain	<b>CPT</b>	--	<b>Capt</b>	<b>Capt</b>
Chief Warrant Officer	<b>CW</b>	<b>CWO</b>	--	<b>CWO</b>
Colonel	<b>COL</b>	--	<b>Col</b>	<b>Col</b>
Commander	--	<b>CDR</b>	--	--
Ensign	--	<b>ENS</b>	--	--
First Lieutenant	<b>1LT</b>	--	<b>1<sup>st</sup> Lt</b>	<b>1<sup>st</sup> Lt</b>
General	<b>GEN</b>	--	<b>Gen</b>	<b>Gen</b>
Lieutenant	--	<b>LT</b>	--	--
Lieutenant Junior Grade	--	<b>LTJG</b>	--	--
Lieutenant Colonel	<b>LTC</b>	--	<b>Lt Col</b>	<b>LtCol</b>
Lieutenant Commander	--	<b>LCDR</b>	--	--
Lieutenant General	<b>LTG</b>	--	<b>Lt Gen</b>	<b>LtGen</b>
Major	<b>MAJ</b>	--	<b>Maj</b>	<b>Maj</b>
Major General	<b>MG</b>	--	<b>Maj Gen</b>	<b>MajGen</b>
Rear Admiral	--	<b>RADM</b>	--	--
Second Lieutenant	<b>2LT</b>	---	<b>2<sup>nd</sup> Lt</b>	<b>2<sup>nd</sup> Lt</b>
Vice Admiral	--	<b>VADM</b>	--	--

**Name Suffix**

***Suffix is a free-text field.*** See the table below for a list of approved values. ***Do not use punctuation.***

Description	Suffix Code
Certified fund Raising Executive	<b>CRFE</b>
Chartered Life Underwriter	<b>CLU</b>
Certified Public Accountant	<b>CPA</b>
Doctor of Chiropractic	<b>DC</b>
Doctor of Divinity	<b>DD</b>
Doctor of Dental Surgery	<b>DDS</b>
Doctor of Dental Medicine	<b>DMD</b>

Doctor of Osteopathy	<b>DO</b>
Doctor of Veterinary Medicine	<b>DVM</b>
Doctor of Education	<b>Dr</b>
Esquire	<b>Esq</b>
The Second	<b>II</b>
The Third	<b>III</b>
Jurist Doctor	<b>JD</b>
Junior	<b>Jr</b>
Doctor of Laws	<b>LLD</b>
Doctor of Medicine	<b>MD</b>
Doctor of Optometry	<b>OD</b>
Past Commander	<b>PC</b>
Doctor of Philosophy	<b>PhD</b>
Retired	<b>Ret</b>
Registered Nurse	<b>RN</b>
Registered Nurse Clinician	<b>RNC</b>
Senior	<b>Sr</b>
United States Army	<b>USA</b>
United States Air Force	<b>USAF</b>
United States Air Force Reserve	<b>USAFR</b>
United States Army Reserve	<b>USAR</b>
United States Coast Guard	<b>USCG</b>
United States Marine Corps Reserve	<b>USMCR</b>
United State Navy	<b>USN</b>

### Legal Name

Do not use.

### Confidential Information Indicator

Place a “Y” in this field if an address disclosure form reflects that the person does not want address and telephone number information released to the public.

### Non-person Name

**Always use the “&”** sign to replace the word “and” (National Council of Mathematics & Statistics).

**The word “the” in the name** should only be capitalized when it appears at the beginning of the name (The Grand Rapids Press).

**Hyphens** may be used to separate double names.

**Apostrophes** may be used.

**Periods are never used**, not even in an abbreviation in a company's name ( for example F & F Securities).

**Commas, #, “, ”, ()** are never used.

**Spacing** – spaces are permitted between multiple names.

Examples:

ABC Trucking  
 J F Kennedy Co  
 First National Bank  
 Dept of Defense  
 Smith Smith & Smythe

**Address Standards**

This section of the standards identifies the address types maintained by the university, the definition of each type, and whether there are restrictions on who can update a particular address type.

**Address Types**

<b>Code</b>	<b>Restrict Update</b>	<b>Description</b>	<b>Explanation</b>
<b>PR</b>		Permanent Address	Permanent home address of a student or employee. In case of a student, where s/he can be reached when not in school. A permanent address is required for all employees and students
<b>LO</b>		Local Address	The address of a student when in school and used for mailings to the student when school is in session. On-campus students will always have their dorm address as their local address.
<b>PO</b>		Purchase Order Address	Address used as the mailing address for purchase orders for purchasing.
<b>HS</b>		On campus Student	The physical address of the on-campus student. We do not mail to this address.
<b>N1</b>		Next of Kin	Address provided by student of the next of kin, can be parent, guardian, spouse or other.
<b>N2</b>		Next of Kin 2	Address provided by student of the next of kin, can be parent, guardian, spouse or other.
<b>SD</b>		Student Direct Deposit	Used for direct deposit of refunds only.
<b>AP</b>		Accounts Payable	Address used as the mailing address for Accounts Payable.
<b>FP</b>		SEVIS Foreign Permanent Address	Address used for employees or students holding F1 or J1 visa. The foreign residence address required by SEVIS.

<b>GD</b>		GVSU Department Address	GVSU employee department address – location of the primary department site for the employee.
<b>GP</b>		GVSU Private Office Address	GVSU employee office address – location of the primary work site for the employee.

When the permanent and local addresses are the same, only the permanent address will be entered. If the Accounts Payable Office gets a new permanent address they will change the permanent address in banner. The AP address type will only be used if the vendor has never been a student and there is no permanent address or if there are specific instructions to send the AP check to an address that is not the permanent address. See Appendix A – Procedure for Name, Address, Telephone and Email Address Updates for further information on when and who may make changes to the addresses.

The following table displays various address types by audience. For each audience and address type, the table outlines whether the address is required or optional.

Address Types	Audience					
	PROSP STDTt	ENROLL STDT	NK	EMPLOYEE	BUSINESS	VENDOR
<b>PR</b>	R	R	O	R		R if no AP
<b>LO</b>		O				
<b>PO</b>						R if no PR
<b>NI</b>			O			
<b>N2</b>			O			
<b>AP</b>						R if no PR
<b>FP</b>	R if F1 J1	R if F1 J1		R if F1 J1		
<b>GD</b>				R		
<b>GP</b>				O		
<b>HS</b>		R if on campus				
<b>SD</b>		O				

Address Type by Audience Table Key:

- R** = Required
- O** = Optional
- Blank** = N/A

**Always type in Building Code first** and the room number second (LMH 201). This will help when we want to sort documents in building order. The following table displays some of the GVSU campus buildings that will be used when addressing a GVSU department.

<b>Building Name</b>	<b>Use:</b>	<b>Building Name</b>	<b>Use:</b>
Alumni House	<b>AH</b>	Au Sable Hall	<b>ASH</b>
Calder Art Center	<b>CAC</b>	Children's Center	<b>CC</b>
Cook-Dewitt Center	<b>CDC</b>	Cook-DeVos Center Health Sciences	<b>CHS</b>
The Commons	<b>COM</b>	Copeland Living Center	<b>COP</b>
Calder Residence	<b>CR</b>	Central Utilities Building	<b>CUB</b>
Depot	<b>DEP</b>	Richard M DeVos Center	<b>DEV</b>
DeVos Living Center	<b>DLC</b>	Eberhard Center	<b>EC</b>
Football Center	<b>FC</b>	Ferguson Family Health Center	<b>FER</b>
Fieldhouse	<b>FH</b>	Edward J Frey Living Center	<b>Rd</b>
140 Front St	<b>FRT</b>	Fulton St Building	<b>FSB</b>
Grand Valley Apartments	<b>GVA</b>	Hoobler Living Center	<b>HLC</b>
Aurhur C Hills Living Center	<b>HLL</b>	Meijer Campus	<b>HOL</b>
Henry Hall	<b>HRY</b>	Zumberge Library	<b>JHZ</b>
Johnson Living Center	<b>JLC</b>	Kirkhof Center	<b>KC</b>
Fred M Keller Engineering Lab Building	<b>KEB</b>	Kistler Living Center	<b>KIS</b>
Kleiner Commons	<b>KLC</b>	Kirkpatrick Living Center	<b>KRP</b>
Lake Huron Hall	<b>LHH</b>	Lake Michigan Center	<b>LMC</b>
Lake Michigan Hall	<b>LMH</b>	Lake Ontario Hall	<b>LOH</b>
Lubbers Stadium Press Box	<b>LPB</b>	Lake Superior Hall	<b>LSH</b>
Loutit Lecture Halls	<b>LTT</b>	Laker Village Apartments	<b>LAV</b>
Mackinac Hall	<b>MAK</b>	Manitou Hall	<b>MAN</b>
Higher Education Center At MCC	<b>MCC</b>	Meadows Club House	<b>MCH</b>
Michigan Alternative & Renewable Energy Center	<b>MEC</b>	Meadows Learning Center	<b>MLC</b>
Meadows Maintenance Building	<b>MMB</b>	Multi-Purpose Facility	<b>MPF</b>
North Living Center A	<b>NLA</b>	North Living Center B	<b>NLB</b>
Glenn A Niemeyer Living Center	<b>NMR</b>	Ott Living Center	<b>OLC</b>
Performing Arts Center	<b>PAC</b>	The Seymour & Esther Padnos Hall of Science	<b>PAD</b>
Papa John's Pizza	<b>PJP</b>	Pickard Living Center	<b>PKC</b>
Pew Living Center	<b>PLC</b>	Ravine Apartments	<b>RA</b>
Ravine Center	<b>RAC</b>	Recreation Center	<b>RC</b>
Robinson Living Center	<b>ROB</b>	South Apartments Building A	<b>SAA</b>
South Apartments Building B	<b>SAB</b>	Service Building	<b>SER</b>

Siedman House	<b>SH</b>	Seidman Living Center	<b>SLC</b>
Seward Parking Lot Ramp	<b>SPL</b>	Secchia Hall	<b>SRH</b>
Stafford Living Center	<b>STA</b>	Student Services Building	<b>STU</b>
South Utilities Building	<b>SUB</b>	Swanson Living Center	<b>SWN</b>
University Center at NMC- Traverse City	<b>TCC</b>	TV Transmitter Building	<b>TV1</b>
University Guest House	<b>UGH</b>	University Health Services	<b>UHS</b>
Winter Hall	<b>WIN</b>	West Living Center A	<b>WLA</b>
West Living Center B	<b>WLB</b>	Koeze Weed Living Center	<b>WLC</b>

### Zip Code/Postal Code Standards

**Zip/postal codes** must be entered for all United States and Canadian addresses. If the zip code is in the GTVZIPC table, after you enter the zipcode, the city and state will be displayed in the appropriate fields eliminating the need to key this information. The address information may be over-riden if necessary.

**For United States addresses**, a hyphen must be entered when the entire nine-digit zip code is available. If the last four digits are unavailable, enter the first five digits in the first five positions of the field without the hyphen.

Example:

49401  
49401-9403

**For Canadian addresses**, enter the six-character zip code. Do not add spaces in the Canadian postal codes.

Example: T2T2Y5

### Street Address Standards

**All address information** is typed in mixed (upper/lower) case format.

**Hyphens, periods and slashes** may be used only when needed for clarity or designated fractions. **Do not use periods on abbreviations.**

Example:

Mid-Island PLZ  
39.2 Rd  
101 ½ Main Street  
289-01 Montgomery

**Use the symbol “&”** rather than spelling out “and”.

**Attention/Care of** – The percent symbol “%” should never be used. Use **c/o** instead and enter on the first street address line.

**Commas, #, “, ” ()** are never used.

### **Secondary Address Unit Designators**

**Pound (#) sign, never use it.** Oracle does not permit its use within BANNER, therefore **NEVER use the #** sign. If the secondary unit designator is not provided and only a # along with the number i.e., 3454 N Jones #4 – remove the # and abbreviate as No without the period – 3454 N Jones No 4.

### ***Recommended abbreviations are:***

Apartment	=	<b>Apt</b>
Space	=	<b>Sp</b>
Room	=	<b>Rm</b>
Floor	=	<b>Fl</b>
Number	=	<b>No</b>
Building	=	<b>Bldg</b>
Suite	=	<b>Ste</b>
Department	=	<b>Dept</b>

Examples:

1624 College NE Apt 15  
1111 Bridge NW No 4  
1600 Central Pl Bldg 3  
75 James Blvd Rm 6  
1 Executive Dr Ste 2121

**Compass directions** that are used to identify the geographic areas of a city are always abbreviated.

Northeast	=	<b>NE</b>
Northwest	=	<b>NW</b>
Southeast	=	<b>SE</b>
Southwest	=	<b>SW</b>
North	=	<b>N</b>
South	=	<b>S</b>
East	=	<b>E</b>
West	=	<b>W</b>

**Post Office Box** should be abbreviated as **PO Box** – not P.O. Box or PO BOX.

**Street Address and PO Box:** If an address contains both a street address and a post office box, they should be entered on two different lines. The US Post Office will deliver mail to the first address line listed above the city/state/zip line.

Therefore, the post office box should be the last part of the address entered before the city/state/zip.

Example: Mr John Smith  
 100 Oak Street  
 PO Box 200  
 Grand Rapids, MI 49502

**Standard Postal Abbreviations – Always use**

To save space, always use the abbreviations listed below. (Remember: Periods are NEVER used in the Street Address fields)

For the word:	Use:	For the Word:	Use:
Annex	<b>Anx</b>	Apartment	<b>Apt</b>
Avenue	<b>Ave</b>	Boulevard	<b>Blvd</b>
Building	<b>Bldg</b>	Causeway	<b>Cswy</b>
Center	<b>Ctr</b>	Circle	<b>Cir</b>
Court	<b>Ct</b>	Department	<b>Dept</b>
Drive	<b>Dr</b>	Expressway	<b>Expy</b>
Floor	<b>Fl</b>	Lane	<b>Ln</b>
Number	<b>No</b>	Office	<b>Ofc</b>
Road	<b>Rd</b>	Room	<b>Rm</b>
Rural Route	<b>RR</b>	Station	<b>Sta</b>
Street	<b>St</b>	Suite	<b>Ste</b>
Terrace	<b>Ter</b>		

**Common Postal Abbreviations- Use when necessary**

Do not use these abbreviations unless there are space limitations. If the address line is more than 30 spaces, use the standards listed below to conform the address line to our programmatic standards. Additional abbreviations may be found at <http://www.usps.com/ncsc/lookups/abbreviations.html#suffix> .

For the word:	Use:	For the Word:	Use:
Alley	<b>Alley</b>	Bayou	<b>Byu</b>
Beach	<b>Bch</b>	Bluff	<b>Blf</b>
Bottom	<b>Btm</b>	Bridge	<b>Brg</b>
Brook	<b>Brk</b>	Bypass	<b>Byp</b>
Camp	<b>Camp</b>	Canyon	<b>Cyn</b>
Corners	<b>Cors</b>	Cove	<b>Cove</b>
Creek	<b>Crk</b>	Estate	<b>Est</b>

Ferry	<b>Fry</b>	Forest	<b>Frst</b>
Garden	<b>Gdn</b>	Gateway	<b>Gtwy</b>
Glen	<b>Glen</b>	Grove	<b>Grv</b>
Harbor	<b>Hbr</b>	Height	<b>Hts</b>
Hills	<b>Hls</b>	Hollow	<b>Holw</b>
Inlet	<b>Inlt</b>	Island	<b>Is</b>
Junction	<b>Jct</b>	Lake	<b>Lk</b>
Landing	<b>Lndg</b>	Lock	<b>Lock</b>
Lodge	<b>Ldg</b>	Loop	<b>Loop</b>
Mall	<b>Mall</b>	Meadow	<b>Mdw</b>
Mountain	<b>Mtn</b>	Orchard	<b>Orch</b>
Oval	<b>Oval</b>	Park	<b>Park</b>
Pass	<b>Pass</b>	Path	<b>Path</b>
Place	<b>Pl</b>	Point	<b>Pt</b>
Pointe	<b>Pte</b>	Ridge	<b>Rdg</b>
River	<b>Rv</b>	Rest	<b>Rest</b>
Row	<b>Row</b>	Shore	<b>Shr</b>
Space	<b>Spc</b>	Spring	<b>Spr</b>
Spur	<b>Spur</b>	Square	<b>Sq</b>
Summit	<b>Smt</b>	Tower	<b>Twr</b>
Trace	<b>Trce</b>	Track	<b>Trk</b>
Tunnel	<b>Tunl</b>	Viaduct	<b>Via</b>
View	<b>View</b>	Valley	<b>Vly</b>
Village	<b>Vlg</b>	Walk	<b>Walk</b>
Way	<b>Way</b>		

**City Standards**

**All address information** is typed in mixed (upper/lower) case format.

**Abbreviations** are permitted if the full city name does not fit due to space limitations. The proper abbreviations will be determined from entering the zip code.

**Punctuation** is never used.

**Other ... Do not enter Canadian provinces** into the city field. They have their own code for entry into the state field. Canadian addresses must include the city in the city field, the Province in the state field, and the postal code in the Zip Code field.

## State and Province Standards

State codes must be entered for all United States and Canadian addresses. The standard abbreviations appear below.

State	Code	State	Code
Alaska	<b>AK</b>	Alabama	<b>AL</b>
Arkansas	<b>AR</b>	Arizona	<b>AZ</b>
California	<b>CA</b>	Colorado	<b>CO</b>
Connecticut	<b>CT</b>	Dist of Columbia	<b>DC</b>
Delaware	<b>DE</b>	Florida	<b>FL</b>
Georgia	<b>GA</b>	Hawaii	<b>HI</b>
Idaho	<b>ID</b>	Illinois	<b>IL</b>
Indiana	<b>IN</b>	Iowa	<b>IA</b>
Kansas	<b>KS</b>	Kentucky	<b>KY</b>
Louisiana	<b>LA</b>	Massachusetts	<b>MA</b>
Maine	<b>ME</b>	Massachusetts	<b>MA</b>
Michigan	<b>MI</b>	Minnesota	<b>MN</b>
Mississippi	<b>MS</b>	Missouri	<b>MO</b>
Montana	<b>MT</b>	Nebraska	<b>NE</b>
Nevada	<b>NV</b>	New Hampshire	<b>NH</b>
New Jersey	<b>NJ</b>	New Mexico	<b>NM</b>
New York	<b>NY</b>	North Carolina	<b>NC</b>
North Dakota	<b>ND</b>	Ohio	<b>OH</b>
Oklahoma	<b>OK</b>	Oregon	<b>OR</b>
Pennsylvania	<b>PA</b>	Puerto Rico	<b>PR</b>
Rhode Island	<b>RI</b>	South Carolina	<b>SC</b>
South Dakota	<b>SD</b>	Tennessee	<b>TN</b>
Texas	<b>TX</b>	Utah	<b>UT</b>
Virginia	<b>VA</b>	Vermont	<b>VT</b>
Washington	<b>WA</b>	West Virginia	<b>WV</b>
Wisconsin	<b>WI</b>	Wyoming	<b>WY</b>

US Territories	Code
American Samoa	<b>AQ</b>
Baker Island	<b>FQ</b>
Commonwealth of Northern Marianas	<b>MP</b>
Federated States of Micronesia	<b>FM</b>
Guam	<b>GQ</b>
Howard Island	<b>HQ</b>
Johnston Atoll	<b>JQ</b>
Kingman Reef	<b>KQ</b>
Marshall Islands	<b>MH</b>
Midway Islands	<b>MQ</b>

Navassa Island	<b>BQ</b>
Northern Mariana Islands	<b>CQ</b>
Palau	<b>PW</b>
Palmyra Atoll	<b>LQ</b>
Puerto Rico	<b>RQ</b>
Trust Territory of Pacific	<b>PS</b>
Virgin Islands of the US	<b>VQ</b>
Wake Island	<b>WQ</b>

<b>Province</b>	<b>Code</b>
Alberta	<b>AB</b>
British Columbia	<b>BC</b>
Manitoba	<b>MB</b>
New Brunswick	<b>NB</b>
Newfoundland and Labrador	<b>NL</b>
Northwest Territories	<b>NT</b>
Nova Scotia	<b>NS</b>
Nunavut	<b>NU</b>
Ontario	<b>ON</b>
Prince Edward Island	<b>PE</b>
Quebec	<b>QC</b>
Saskatchewan	<b>SK</b>
Yukon Territory	<b>YT</b>

**County/City Code Standards**

Enter only those county values listed below. Leave the field blank if the appropriate county code is not found. Punctuation is never used.

<b>County</b>	<b>Code</b>	<b>County</b>	<b>Code</b>
Alcona	<b>ALC</b>	Alger	<b>ALG</b>
Allegan	<b>ALL</b>	Alpena	<b>ALP</b>
Antrim	<b>ANT</b>	Arenac	<b>ARE</b>
Baraga	<b>BRG</b>	Barry	<b>BRR</b>
Bay	<b>BAY</b>	Benzie	<b>BEN</b>
Branch	<b>BRA</b>	Calhoun	<b>CAL</b>
Cass	<b>CAS</b>	Charlevoix	<b>CHA</b>
Cheboygan	<b>CHE</b>	Chippewa	<b>CHI</b>
Clare	<b>CLA</b>	Clinton	<b>CLI</b>
Crawford	<b>CRA</b>	Delta	<b>DEL</b>
Dickinson	<b>DIC</b>	Eaton	<b>EAT</b>
Emmet	<b>EMM</b>	Genesee	<b>GEN</b>
Gladwin	<b>GLA</b>	Gogebic	<b>GOG</b>
Grand Traverse	<b>GRT</b>	Gratiot	<b>GRA</b>

Hillsdale	<b>HIL</b>		Houghton	<b>HOU</b>
Huron	<b>HUR</b>		Ingham	<b>ING</b>
Ionia	<b>ION</b>		Iosco	<b>IOS</b>
Iron	<b>IRO</b>		Isabella	<b>ISA</b>
Jackson	<b>JAC</b>		Kalamazoo	<b>KZO</b>
Kalkaska	<b>KLK</b>		Kent	<b>KEN</b>
Keweenaw	<b>KEW</b>		Lake	<b>LAK</b>
Lapeer	<b>LAP</b>		Leelanau	<b>LEE</b>
Livingston	<b>LIV</b>		Luce	<b>LUC</b>
Mackinac	<b>NCK</b>		Macomb	<b>MCB</b>
Manistee	<b>MAN</b>		Marquette	<b>MAR</b>
Mason	<b>MAS</b>		Mecosta	<b>MEC</b>
Menominee	<b>MEN</b>		Midland	<b>MID</b>
Missaukee	<b>MIS</b>		Monroe	<b>MNR</b>
Montcalm	<b>MNT</b>		Montmorency	<b>MNM</b>
Muskegon	<b>MUS</b>		Newaygo	<b>NEW</b>
Oakland	<b>OAK</b>		Oceana	<b>OCE</b>
Ogemaw	<b>OGE</b>		Ontonagon	<b>ONT</b>
Osceola	<b>OSE</b>		Oscoda	<b>OSC</b>
Otsego	<b>OTS</b>		Ottawa	<b>OTT</b>
Presque Isle	<b>PRE</b>		Roscommon	<b>ROS</b>
Saginaw	<b>SAG</b>		St Clair	<b>STC</b>
St Joseph	<b>STJ</b>		Sanilac	<b>SAN</b>
Schoolcraft	<b>SCH</b>		Shiawassee	<b>SHI</b>
Tuscola	<b>TUS</b>		Van Buren	<b>VAN</b>
Washtenaw	<b>WAS</b>		Wayne	<b>WAY</b>
Wexford	<b>WEX</b>			

### Country Code Standards

A country code is required for all non-United States addresses. Do not enter a country code for United States addresses. For the current list of valid country codes within the Banner system go to form STVNATN.

### Military Address Standards

**Military addresses** for destinations within the United States should be addressed no differently than any other mail. Following are instructions for military addresses outside of the United States:

Enter the APO or AFO code into the city field.

In the state field enter:

AE – Europe, Middle East, Africa or Canada (ZIP=09nnn)

AP – Pacific (ZIP=96nnn)

AA – The Americas (excluding Canada) (Zip=34nnn)  
Example  
Joe Bob Smith  
HHB 6<sup>th</sup> Battalion 43<sup>rd</sup> Box 72  
Air Defense Artillery CMR 417  
APO AE 09602-8802

## Banner Conventions for International Addresses

**Canadian and Puerto Rican Addresses** – Canada has its provinces listed with the state codes in Banner; Puerto Rico has a state (territorial) code of “PR.” Both follow United States address conventions and have 5-9 digit zip/postal codes. Canadian students on F-1 and J-1 visas must report a SEVIS foreign Permanent Address (FP). Puerto Rican students are US citizens; their addresses do not need to be listed in the SEVIS Foreign Permanent Address (FP).

**Required addresses for international students** – Federal regulations related to the Department of Homeland Security’s Student and Exchange Visitor Information System (SEVIS) require that the university maintain two addresses for students on F-1 or J-1 visas:

**SEVIS Foreign Permanent Address (FP)** – The address of the student in his home country; a post office box number is acceptable in this instance. The Registrar’s Office is the only office authorized to use the FP address type. They will record the foreign permanent address for new applicants, continuing students and alumni.

**Local address (LO)** – represents the address where the international student is living while he is enrolled in classes. The university is required to maintain and report to the Bureau of Citizenship and Immigration Services the physical location of students on F-1 or J-1 visas while in the United States. Post office box numbers are NOT acceptable for this purpose. US local addresses are maintained for F-1 and J-1 students as Local Address (LO) if the student lives off campus. Care should be taken when changing LO address for international students on F-1 or J-1 visas to ensure compliance with the federal regulations.

**International Provinces, Prefectures, or States** – should be entered on the last line of the address prior to the city, except for Canadian provinces which are listed in state.

**Postal Codes** – if they are nine digits or fewer, enter the code in the 9-digit zip/postal code field.

**Maintenance of the Zip Code, City, County, State** tables will correspond to the United States Postal Service standards.

## Telephone Number Standards

**Area Code:** The three-digit area code must be entered for all phone numbers.

**Phone number:** Enter the seven-digit phone number without the hyphen between the third and fourth digits.

Example: 3313327

**Extension:** If an extension number is provided, enter only the digits of the extension. Do not enter EXT or X into the extension field.

Example: 13327

## Telephone Types

The telephone type simply describes the type of telephone number entered. The following assumptions/rules apply for the use of telephone types.

In Banner, **each phone number can be associated with only one address but one address can be associated with multiple phone numbers.** Rules can be established to automatically associate a phone number type with an address type.

**Only one telephone number can** be designated as the primary telephone for its associated address.

The following table contains approved telephone types and a description of each

Code	Description	Address Association
PO	Vendor Order Phone	PO
AP	Accounts Payable Phone	AP
BI	Grant Billing Phone	BI
EC	Emergency Contact	None
CELL	Cellular Phone	None
FAX	Facsimile Number	None
PR	Permanent	PR
REF1	Reference 1	None
REF2	Reference 2	None
N1	Next of Kin	NK
N2	Next of Kin 2	NK2
EMP	Employer	None
LOC	Local Phone	LOC
GP	Grand Valley Private Office Phone	GP
GD	Grand Valley Department Phone	GD

## Email Address

A staff member will be assigned one email address to which all official GVSU communication will be sent. The type will be labeled GV and may occur only once per employee.

Students will be assigned an email address, which may be changed to their personal email account in a preferred email type labeled PR. Student mailings should always mail to the PR email.

The following are email types that may be used.

<b>AP</b>	Accounts Payable
<b>P1</b>	Parent One
<b>P2</b>	Parent Two
<b>GV</b>	Grand Valley assigned email address
<b>PS</b>	Personal Student email address
<b>PR</b>	Grand Valley student assigned email address

## Date Standards

**All dates must** be entered dd-mon-ccyy (hyphens are optional)

Example:

January 17, 2000 should be entered as 17-jan-2000 or 17jan2000.

# Chapter 3: General Person Information Standards

Biographic data specific to a person

## Gender

The following table indicates the valid values for gender with in the system.

Code	Description
F	Female
M	Male
N	Not available, use when not known or supplied

## Social Security Number Standards

Social security **number must be entered** for all employees of any type. An attempt will be made to collect student social security numbers. Enter the nine-digit number, omitting the hyphens

If the information is unavailable, leave blank. Do NOT enter 000000000 or 999999999 or any other type of “holder” number.

## Date of Birth

**Date of birth is required for employees and students.**

Enter the date in following standard: dd-mon-ccyy ( 30-jan-1948 or 30jan1948). Hyphens are optional. If date is unknown enter 01-jan-1900 to “hold” the date and allow processing. Records containing this date will be routinely identified and corrected.

## Citizen Type

This is a **required field for student and employee** records. The legal values are noted in the table below.

Code	Description
US	US Citizen
RA	Resident Alien
PR	Permanent Resident
RF	Refugee
NR	Non-resident alien/international
OT	Other/Not provided

## Legacy Code

Information on family members that are alumni is collected at the time of admission.

Code	Description
P	Parent
S	Sibling
B	Parent and Sibling
O	Other
N	None

## Marital Code

Used by Financial Aid and Human Resources.

Code	Description	Explanation
M	Married or Remarried	Legally married
S	Single	Never legally married
X	Unreported	Not reported or unknown
D	Divorced	Once married, now legally divorced
W	Widowed	Legally married, spouse deceased
P	Separated	Legally married, now living apart

## Relation Code

Used for the next of kin contact information.

Code	Description
D	Advisor
A	Aunt
B	Brother
C	Child
F	Father
G	Grandfather
R	Grandmother
U	Guardian
H	Husband
M	Mother
N	Not specified
T	Other
P	Partner
S	Sister
I	Uncle

<b>W</b>	Wife
----------	------

### **Race/Ethnicity Code**

This field must be entered for employees and students in order to fulfill reporting/regulatory requirements. The university will use the IPEDS codes. Banner allows definition of sub-categories that roll up to the first character of the code. GVSU may use the feature in the future as dictated by local and federal reporting requirements. For complete information see the IPEDS Race/Ethnicity Category Definitions at [www.nces.ed.gov/IPEDS](http://www.nces.ed.gov/IPEDS)

<b>Code</b>	<b>Description</b>
<b>1</b>	Black
<b>2</b>	American Indian, Alaska Native
<b>3</b>	Asian, Native Hawaiian or Other Pacific Islander
<b>4</b>	Hispanic or Latino (All Races)
<b>5</b>	White (non-hispanic)
<b>6</b>	Unknown/Unreported

### **Deceased Information**

The following chart will depict which office has the responsibility for loading information about the death of a person. Many processes are derived from this information so it is important the responsible office is informed of the death when the person record has shared uses. Please see Appendix B for complete information on the process to follow in the case of an employee death.

<b>Category of Person</b>	<b>Responsible Office</b>
<b>Student/Student Employee</b>	Registrar's Office
<b>Applicant – admissions</b>	Registrar's Office
<b>Alumni</b>	Registrar's Office – Alumni/Development
<b>Employee</b>	Human Resources

## APPENDIX A

### PROCEDURE FOR NAME, ADDRESS, TELEPHONE & EMAIL ADDRESS UPDATES

#### General Person Name and Social Security Number (SSN) Changes:

1. Upon presentation of a current Social Security Card, Records, Human Resources or Accounting will change the person's name or Social Security Number (SSN) to exactly match the Social Security Card. A letter from the Social Security Administration showing that a change of name or SSN is in process with the Social Security Administration is the only acceptable substitute for a current Social Security Card. A copy of the document presented should be made and sent to records.
2. Updated Social Security Numbers will be entered in the SSN/SIN/TIN field of the SPAIDEN Biographical tab.
3. In the circumstance where an error in the SSN is corrected, the previous SSN will also be entered as a previous (PREV) ID on the Alternate Identification tab of SPAIDEN.

#### Address Changes:

1. All appropriate addresses, telephone numbers and email addresses will be updated through Records office, HR, Payroll, Student Accounts, Student Employment, Purchasing, Accounts Payable, Housing Director or Payroll script except for the FP address type which can only be updated by Records and HR.
2. The user should inactivate the old address by clicking the inactive icon and adding an end date.
3. Update the source field with the source of the change.
4. Persons can either have an active PR/LO or PO/AP but not both types. Make sure that a PR address is active before inactivating the duplicate address type. Note: Accounts Payable and Purchasing should not set up any other address type other than AP or PO as a default address type on their form FTMVEND.
5. Address types to be updated in Banner  
PR (Permanent Address)
  - 1098T forms
  - Admission Correspondence – including initial Housing information
  - Degree analysis
  - Expense reimbursements

- Faculty/Staff parking permits
- Diploma
- Financial Aid Awards
- Financial Aid missing info
- Financial Aid checks if no direct deposit
- Paychecks if mailed
- Student tuition bills
- W-2's if received a paycheck from the university

LO (Local Address)

- Degree analysis (Oct/May)
- Expense reimbursements
- Diploma
- On campus Housing – make sure that these do not get changed by users
- Off campus student housing if requested

FP (Foreign Permanent)

- Can only be updated by Records and HR – it is used by SEVIS

HS (Student Housing)

- Can only be updated by THD (Housing Director – Adirondack)

SD (Student Direct Deposit)

- Updated nightly after a student has signed up for direct deposit)

GD (Grand Valley Paycheck address)

- Can only be updated by payroll script

GP (Grand Valley personal office)

- Can only be updated by HR

AP (Accounts Payable)

- Only used by the Finance modules

PO (Purchase Order)

- Only used by the Finance modules

N1 (Next of Kin)

N2 (Next of Kin)

### Telephone Number Changes:

- Telephone number types to be updated include permanent (PR) – phone number of the permanent address, local (LO) – phone number of the local address – on campus phone numbers will be updated by the Housing Director software, next-of-kin (N1 and N2), cell (CELL)
- REF1
- REF2
- EMP- used by student collections office
- EC – used by Human Resources and Records

### Email Changes:

The preferred check box must be checked in order to see the email on the class list

- PR – used in records and by the Housing Director software
- P1 - used in records
- P2 - used in records
- GV – Used for employee paycheck
- AP – Used for vendor direct deposits
- PS – Personal Student Email Addresses

### Making Name and SSN Changes:

1. Go to SPAIDEN and enter the SIS ID number or conduct a search by selecting the drop down button. You can search by name or SID under the Person Search, or use the Alternate ID Search option to search by SSN.
2. Once you have found the student, double click on the number to return to SPAIDEN with that student in the key block. Click on next block to populate the data block.
3. Click into the name field on the Current Identification tab and update the name. Be sure to save your changes. This will create an entry on the Alternate ID tab

without designating a type. Click on the Alternate ID tab and assign previous (PREV) as the type.

4. If changing an SSN, click on the Biographical tab of SPAIDEN and enter the new SSN in the SSN/SIN/TIN field. Then click on the Alternate ID tab and enter the old SSN as a previous (PREV) ID.
5. If changing a SSN to a system-generated 88 number, enter the new 88 number in Banner on the Alternate ID tab as a Legacy – conversion (LGCY) number.

Oracle Developer Forms Runtime - Web: Open > SPAIDEN

File Edit Options Block Item Record Query Tools Help

General Person Identification SPAIDEN 7.2 (STUT)

ID: G00263279 Brittainy, Rebecca S. Generate ID: [icon]

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

ID: G00263279 Name Type: [dropdown]

**Person**

Last Name: Brittainy [dropdown]  
First Name: Rebecca [dropdown]  
Middle Name: S [text]  
Prefix: [text]  
Suffix: [text]  
Preferred First Name: [text]  
Full Legal Name: [text]

**Non-Person**

Name: [dropdown]

**ID and Name Source**

Last Update

User: GALBAVIL [text]  
Activity Date: 18-AUG-2006 [text]  
Origin: SPAIDEN [text]

**Original Creation**

User: SCTCVT [text]  
Create Date: 07-AUG-2006 [text]

Current identification number, oveltype to change.  
Record: 1/1 | ... | <OSC>

## Making Address, Email or Telephone Updates:

1. Go to SPAIDEN and enter the SIS ID number, G number or conduct a name/number search.
2. Once you have found the student, double click on the student number to return to SPAIDEN with that student in the key block. Click on next block to bring the data into the data block.
3. Select the appropriate tab for updating. Inactivate the current address/phone/email by checking the inactivate box. For address changes, enter the appropriate To Date or "T" to fill in today's date if the change is

effective immediately. Be sure to check that you are inactivating the correct address and save your changes. Scroll down the page to see all current addresses.

4. Add an updated address by selecting Record and Insert. Enter the effective date or "T" for today if the change is effective immediately. Save your changes.

The screenshot displays the Oracle Developer Forms Runtime interface for a 'General Person Identification' form. The 'Address' tab is active, and the 'Record' menu is open, with 'Insert' selected. The form contains the following fields and values:

- ID:** G00190616
- From Date:** 21-AUG-2006
- To Date:** (empty)
- Address Type:** PR Permanent
- Sequence Number:** 2
- Street Line 1:** 104 STU
- Street Line 2:** (empty)
- Street Line 3:** (empty)
- City:** Allendale
- State or Province:** MI Michigan
- ZIP or Postal Code:** 49401
- County:** (empty)
- Nation:** (empty)
- Telephone Type:** PR Permanent
- Telephone:** (empty)
- Inactivate Address:**
- Source:** (empty)
- Delivery Point:** (empty)
- Correction Digit:** (empty)
- Carrier Route:** (empty)
- Last Update:**
  - User:** STOUTJEM
  - Activity Date:** 21-AUG-2006

The status bar at the bottom indicates 'Insert Record: 2/2' and '<OSC>'.

## APPENDIX B

### PROCEDURES FOLLOWING DEATH OF AN ACTIVE EMPLOYEE OR STUDENT EMPLOYEE

(Note: Any of the areas listed below may be the first office notified of the death of an active employee or retiree. In any case, the first office notified should in turn notify the other offices.)

#### Employing Department:

- Notify Human Resources/Student Service (Human Resources/Student Services will have benefit and retirement issues to handle and will contact the deceased's surviving beneficiaries by mail.)
- Notify Payroll Office (Notification of the death of an active employee or student employee in advance of updating Banner will ensure that future checks are not deposited electronically and that taxes and other deductions are handled correctly when checks are issued.)
- Notify appropriate parties within department and the University of the death (and funeral arrangements, if applicable and appropriate.)
- If applicable, notify survivors of any personal items, papers, etc., in the department's possession that were the property of the deceased and discuss how such items are to be handled (if any items of significant value are involved, discuss with the University Counsel Office before releasing.) If applicable, pack and store items in a secure place.
- If applicable, and if items of University Property (i.e. equipment, keys, uniforms, etc.) were in possession of the deceased, notify survivors (in writing if necessary) that these items are to be returned to the department.

#### Human Resources/Student Services:

- Forward letter to survivor/beneficiaries outlining benefit related information and final pay process.
- Update date of termination in Banner using the date of death. Note last date worked and any leave expended during final month of employment. Vacation and/or sick leave benefits must be paid separately.
- Set-up the estate with a new G number in Banner. Use the estate tax ID noted on IRS Form W-9.

- Notify retirement plan vendors and insurance carriers.
- Coordinate issuance of payments to executor or appropriate survivor(s).

#### **Payroll:**

Process final payments owed to the estate of deceased employee according to applicable tax and legal requirements.

#### **University Relations, Communication & Marketing (UCM):**

Ensure a notice of death of the employee or retiree is published in appropriate University publications.