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Alumni, Parents and Donors

Creation and maintenance of Parent and Donor records are the responsibility of University Advancement. Maintenance of Alumni records are the responsibility of University Advancement.

Reference, [Appendix A: General Person Process Flow](#) for more detailed information.

on12 Tc[(.)] TJET@0.000

Confidentiality

Students, faculty and staff can request that a confidentiality indicator be set on their record within the ERP database. Setting this indicator fYgf]WgÍ D JfYMc fml bZcfa Uh]cbİ Zfca VY]b[a UXY available to the University at large. Releasing directory information about anyone who has requested confidentiality is prohibited. Anyone who releases any information about individuals coded as confidential will be in violation of University policy and other federal and state privacy laws. Reference, [Confidentiality Indicator](#) and [Student Rights and Confidentiality of Information](#).

General Person Information Data Procedures

It is required that the University adhere to data entry and processing standards across systems to ensure consistency of General Person Information for purposes of query and report generation.

It is required that offices as well as data loads from 3rd party applications that process General Person Information maintain the data in a consistent manner as outlined in this document.

General Person Information consists of Name, Address, Telephone, Biographical, Email, Emergency Contact and Additional Identification. Reference the [Banner ERP General Person Glossary](#) for details on data fields referenced in procedures.

Create New Person Record

For control purposes,

displaying all possible matches.

Searching in the above way will find matches that may otherwise be overlooked when performing a GOAMTCH outlined in step 6 below.

2. Click the plus (+) sign (Maintenance Button) to the right of the ID Field to generate a random ID.
3. GOAMTCH is invoked automatically, unless you have been made exempt from the Common Matching process.
4. Matching Source Field: If a default source code was assigned to your user ID on the Common Matching User Setup Page (GORCMUS), it will automatically appear in the Matching Source field on GOAMTCH. If the Allow Other Matching Sources checkbox is selected for your user ID on GORCMUS, you can change the source code on GOAMTCH to use a different set of Common Matching rules. If a default source code was not assigned to your user ID, enter one in the Matching Source field or select one from the list of values. Perform a Next Block function.
5. Enter the information about the person in the Data Entry window. This information will be used to check for a match. At the minimum, you must enter the Last Name. It is recommended to enter all known information.
6. Select the Duplicate Check icon to initiate the Common Matching process. See Common Matching Rule Section below for more details on Rules.

Based on the rules associated with the Matching Source, there are three possible results of the common matching process:

- A. New - The record does not exist. A pop-up window will appear, asking you if you want to create the record. Select Yes or No.
- B. Match - One record matches the data you entered exactly. The information on the matched record appears on the Match tab on GOAMTCH.
 - < SYWMID %IDEN page that you started from.
 - < Select SYWMID belongs to.

< SYWth\YÍ UdXUy IDÍ]Vtb]Zmci YbhYfYX]bZcfa U]cb]b GOAMTCH h\Uhg\ci `X VY

Guidelines for maintaining General Person Information

Current Identification

Name Change or Correction

To make a name change or correction, enter the changed or corrected name in the field. A previous name record will automatically be created and will be accessible through the Alternate Identification tab of the corresponding %IDEN page.

A report is produced with all name changes and reviewed by IT staff. If the name change is a correction with minimal impact, the previous name record is removed from the system-

Preferred Name Process

Students who wish to use a preferred name must complete a [Change of Bio-Demographic Information Form](#) and submit it to the Office of the Registrar. Under certain circumstances, Human Resources will allow an employee to declare a preferred name. These requests must go directly to Human Resources. These requests must go directly to Human Resources. These requests must go directly to Human Resources. This is not the Preferred First Name Field.

Name Type

Name types LG (legal) and PR (Preferred) are used in the [Preferred Name Process](#).

Other name types can be associated with a name, however, there is no processing associated with name types other than LG and PR.

Alternate Identification

The %IDEN page to enter any name variations for the record that is being entered that will help in subsequent searches for the record. Please see the following examples:

- < Jonathon Smith could have an alternate name of Jack Smith if he chooses to go by Jack.
- < Mary Jones-MacMurphy should have alternate names of Mary Jones & Mary MacMurphy

Address

Clean Address, a product from [Runner Technologies](#), is used to validate certain address types. Reference [Appendix D: Address Types](#) for information on these address types. Reference [Appendix E: Clean Address Standards](#) for information on Clean Address.

Adding an address of the same type

A Tc D

Telephone

Adding a telephone number of the same type

When adding a subsequent telephone of the same type, the previous number needs to be marked as Secondary. A new record. NOTE: You can have more than one phone number of the same type assigned to the same address or no address. However, only one phone number (of any type) assigned to the same address can be marked as Primary.

The telephone type usually matches the address type code, however there are situations where

In addition to this message, various reports and displays exclude records that are marked confidential. For students, this information is maintained in the Office of the Registrar and a request for update is made to the student body at the start of each Academic Year.

Deceased Indicator/Date

Due to sensitivity, prompt attention is important so future mailings from University offices are discontinued. Deceased status must be verified information, not jus

Banner ERP General Person Glossary

Current Identification

Current Identification consists of Name Type, Last, First and Middle Name, Prefix, Suffix, Preferred First Name, Full Legal Name for Persons and Non-Person Name for non-persons. NOTE: It is recommended to avoid using special characters in any name fields since the character may not be represented, as it should in all systems using the data.

ID

Definition: RoyalID is a system identification generated when the general person record is created.

Format: For persons, 9 character field, beginning with R.

Required: Yes.

Name Type

Definition: Code to be associated with a name for specific correspondence and reporting, such as, maiden, nickname, legal.

Format: List of values provided within Banner Admin.

Required: No, except for the [Preferred Name Process](#) and/or specific department requirements.

Last Name

Definition: Person Last Name with a maximum length of 60 characters.

Format:

- Enter in mixed cased; not all uppercase or lowercase. Enter as submitted by individual.
- Hyphens may be used to separate compound last names (Stevens-Smith). If there are two unhyphenated last names (James Stevens Smith), Stevens Smith is entered in the last name field.
- Apostrophes may be used in such names as O'Leary, O'Conner, etc.
- The Period [.] , Comma [,] , pound sign [#] , asterisk [*] and percent [%] are NOT to be used in the last name field.
- Do NOT include suffix in the last name field. There is a separate field for this. Examples include, Jr., Sr., M.D., etc.

Required: Yes.

First Name

Definition: Person First Name with a maximum length of 60 characters.

Required: No.

Preferred First Name

Definition: Person Preferred First Name with a maximum length of 60 characters. This field is NOT part of the Preferred Name Process. The field is for display purposes only through Banner Admin. Any other reporting of this field is for isolated use cases.

Use Cases:

- Person named Christopher John Smith, prefers to be called John, then "John" can be entered in the Preferred First Name field, leaving "Christopher" as the first name and "John" as the Middle Name.
-

Change Type

Definition: This indicates that there is a Change.

Format: List of values provided within Banner Admin, only use Name. ID changes are generated by the system.

Required: Only Change Type of NAME should be used. Do not use ID Change Type.

Address

Address consists of From Date, To Date, Address Type, Street Line 1,2 & 3, City, State/Province, Zip/Postal Code, County, Nation, Source. NOTE: Special characters in the Address fields are not handled by Clean Address and should not be used. [Reference General Person Guidelines section for additional information needed to maintain Address data.](#)

From Date

Definition: Starting Date to be associated with a specific address.

Format:

- Abbreviate street directional (e.g. enter South as S, North as N) and/or other locators. Reference <https://www.usps.com/> for a list of suggested address abbreviations.
- Do NOT abbreviate any street names or street suffixes (Y.[. YbhYf Bci `Yj UfX UjÎ Bci `Yj UfXÎ , YbhYf ShfYYhUjÎ ShfYYhî)
- A VVfYj]UHY hY XYg] [bU]cb Zcf Eb WfY cZnc Î C/Oî UbX YbhYf Uj ShfYYhL]bY 1.
- Clean Address will adjust certain address type codes using USPS standards.
- For campus work address: Building Code Abbreviation (in square brackets), Building Name and Room number following the format of this example: [AMH] Alumni Memorial Hall 030

Required: Street Line 1 is required. Street Line 2 and 3 are optional.

City

Definition: City with a maximum length of 30 characters.

Format: City is to be entered using mixed case and without punctuation.

Required: Yes.

State or Province

Definition: State or Province code with a maximum length of 3 characters.

Format: List of values provided within Banner Admin.

Required: Yes, for domestic addresses. If one of these sovereign nations, enter the nation as the state: MARSHALL ISLANDS, PALAU and FEDERATED STATES OF MICRONESIA

Zip or Postal Code

Definition: Zip or Postal Code with a maximum length of 30 characters.

Format:

Required: No. An automated process runs daily to update the county code. Reference [Appendix F: Automated Processes](#)

Nation

Definition: Nation Code with a maximum length of 5 characters.

Format: List of values provided within Banner Admin.

Required: Do NOT enter a code for addresses within the United States or one of the following territories: American Samoa, Guam, the Northern Mariana Islands, Puerto Rico, and the U.S. Virgin Islands.

Source

Definition: Source Code describes the source providing the address. It has a maximum length of 4 characters.

Format: List of values provided within Banner Admin.

Required: No, except for specific department requirements.

Telephone

Telephone consists of Telephone Type, Area Code, Phone Number, Extension, International Access, comment, associated address type and indicator (primary, unlisted, inactivate). [Reference General Person Guidelines section for additional information needed to maintain Telephone data.](#)

Telephone Types

Definition: Telephone type to be associated with a specific telephone. There is a corresponding telephone type for each address. [Additional telephone types are defined in Appendix J.](#)

Format: List of values provided within Banner Admin.

Required: Yes.

Area Code

Definition: Area Code associated with a specific telephone. Area Code has a maximum length of 6 characters.

Format: As provided.

Required: Yes.

Phone Number

Definition: Phone Number with a maximum length of 12 characters.

E-mail Address

Definition: Full deliverable e-mail address

Format: As provided.

Required: Yes.

Preferred

Definition: Indicate here if this is the preferred email of the individual.

Format: Checkbox indicator.

Required: No.

Inactivate

Definition: Indicate here if this is an inactive e-mail.

Format: Checkbox indicator.

Required: No.

Display on Web

Definition: This indicator is set if an EMAIL Type defined as WEB is entered. It indicates whether or not the email may be displayed on Self-Service Banner.

Format: Checkbox indicator.

Required: System Generated.

URL

Definition: This indicator is set if an Email Type defined as an URL is entered.

Format: Checkbox indicator.

Required: System Generated.

Comment

Definition: Comment area

Format: Comment is to be entered with mixed case.

Required: No.

Biographical

Biographical information consists of legal sex, gender, personal pronoun, birthdate, SSN, marital status, citizenship, ethnicity, race, religion, confidentiality indicator and deceased indicator/date.

Legal Sex

Definition: Checkbox field of legal sex.

Format: Checkbox selection, choose Male or Female.

Required: Yes, for employees and students for federal and state reporting compliance.

Gender Designation

Definition: The Gender Identity of the person. Future Use.

Format: List of values available within Banner Admin.

Required: No.

Personal Pronoun

Definition: Personal Pronoun of the person. Future Use.

Format: List of values available within Banner Admin.

Required: No.

Birth Date

Definition: Birthdate of the person.

Format: MM/DD/YYYY

Required: Yes, for all employees and students.

SSN/SIN/TIN

Definition:

Priority

Definition: Sequential priority of emergency contact.

Format: Numeric Value

Required: No.

Relationship

Definition: Code identifying the relationship of the emergency contact to the person.

Format: List of values provided within Banner Admin.

Required: No.

Name (Last, First, Middle)

Definition: Last, First and Middle Name of the Emergency Contact.

Format: Reference [Name Fields](#) defined in the [Current Identification](#)

Additional Identification

Definition: Identifies ID used in the external system that will be used for mapping.

Format: As required by the external system.

Required: No.

Appendix A: General Person Process Flow

General Person/Biographical Data Process

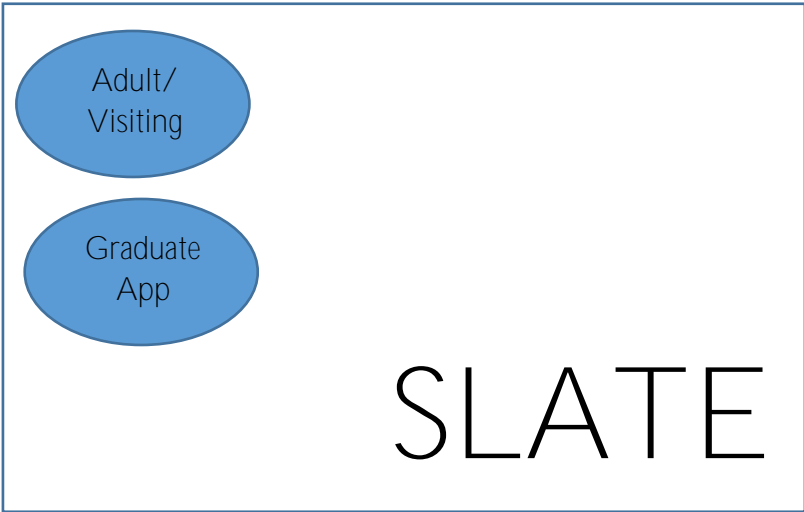
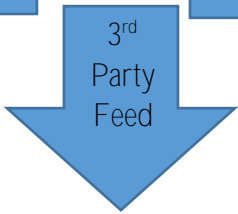
Timeline	Office	Population	General Person Field exceptions
STUDENT Applicant Process: Start of Applicant Process up to Orientation or 1 st Day of Class (if no orientation)	A Xa jccblg O ZW	Prospective students in the admission lifecycle except prospective students that are employees	

Student Applicant Process

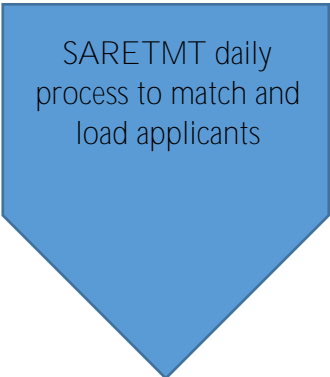
Common App (FR/TR)

PTCAS app-confirmed added to Banner

Notes:
PTCAS - Physical Therapy CAS

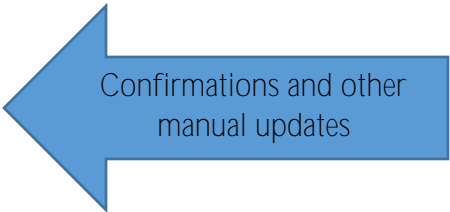


Confirmation by Student



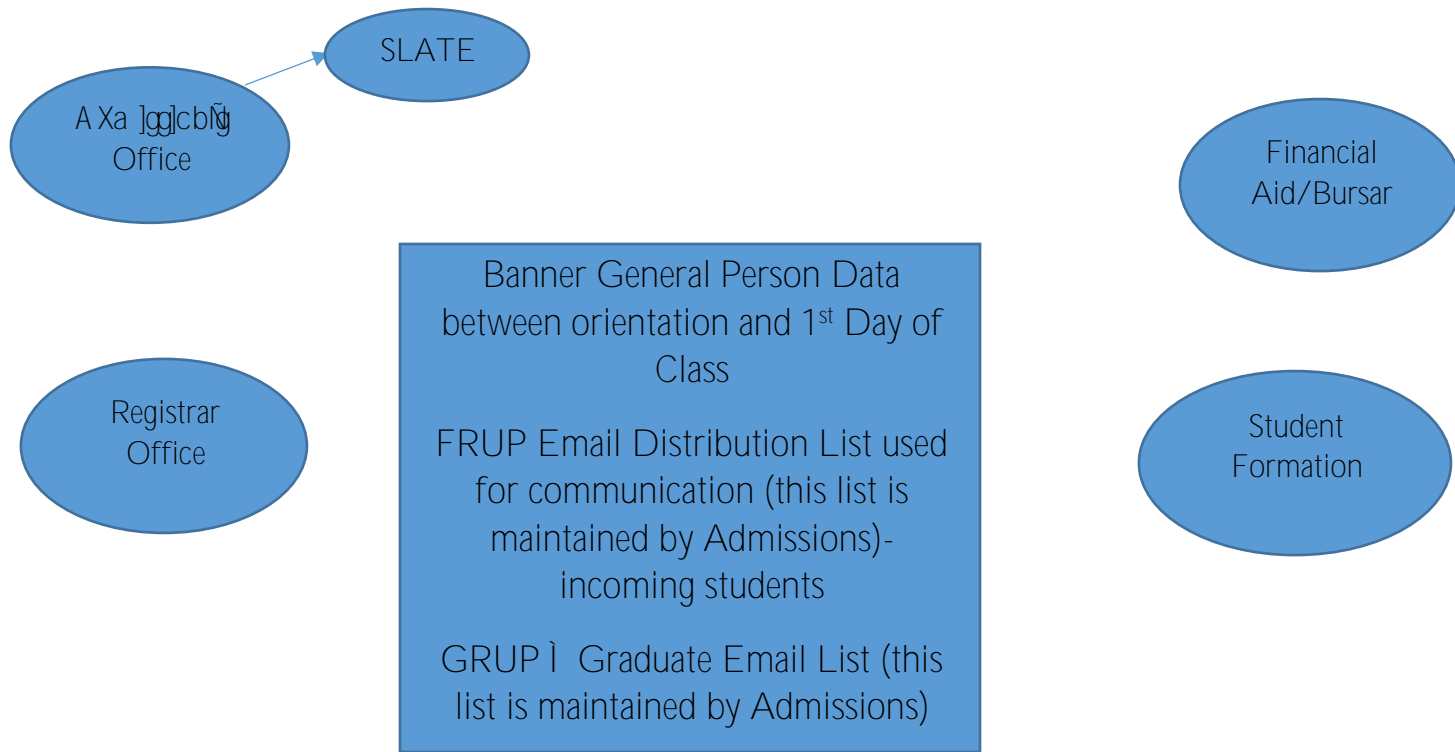
Banner

Applicant (SAAEAPS)
Confirmed (automatically creates SGASTDN)



A Xia Jggcbg Office

Between Orientation and 1st Day of Class Process



Matriculation through Graduation Process

- < Financial Aid automated process updates BLANK SSN from FAFSA
- < <https://www.scranton.edu/academics/registrar/undergraduate/Bio>

Post-Graduation Process

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Date	Audit Trail of Changes
December, 2018	General Person Process flow accepted by ATAC-Data Governance Group
February, 22 2022	Review and Acceptance of General Process Flow documents: Student Applicant Process, Between Orientation and 1 st Day of Class Process, Matriculation through Graduation Process, Post-Graduation Process, Employee Process by ATAC-Data Governance Group

Appendix B: Common Matching Rules

Banner Page GORCMRL details specific matching rules.

Person Search

Last_name: Up to the first 6 characters are used in the match. This must be entered.

First_name: Up to the first 4 characters are used in the match.

Appendix C: Duplicate Pidm Processing

One person with two data records is referred to as a Duplicate Pidm Record. A Pidm is an internal system identifier for a record. Duplicate Pidm Records can be generated by either improper use of GOAMTCH/GUASYST when searching for persons or through automated data loads.

Duplicates are identified on the various person searches. If a person is found with two entries on the system, look to the far right column. If an 'N' exists, this indicates a name change. If an 'I' exists, this indicates

Used for research purposes (Advancement), no end date, not used in any processes, researcher must know to look for it.

TX: Local Tax Only

Appendix H: Suggested Name Prefixes (non-military)

PREFIX	DESCRIPTION
Amb.	Ambassador
Archbishop	Archbishop, a bishop of higher rank

Ranger Rep.	Ranger: law enforcement, Army
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Appendix J: Telephone Types

BI: Billing

CELL: Cell phone

CH: Corporate Headquarters

CM: Matching Gift

CT: Urgent Contact Confidential

DO: Dorm

DR: Dorm Room

FA: Foreign Address

FAX: Fax Number

Associated with address type codes of PO, RT, WA, BU or in special cases, MA

HFAX: Home Fax Number

Associated with address type codes of MA, LO

GU: Guardian

IN: Independent

LO: Local

MA: Mailing

NP: Non-Custodial Parent Address

OR: Student Phone of Origin

PO: Purchase Order

RT: Remittance

SA: Study Abroad

SE: Seasonal

TE: Temporary Phone Number

WA: Working Phone Number

WORK: Work contact number

Associated with address type of MA

WPRV: Work Private

E a d`cmYfj UY `bY k \Yb h\YWA Telephone type is a departmental line. This code was created so that all desk phones could be contacted by the Emergency Notification System (ENS). It should be associated with address type of WA.

Additional Student Related Information

Admit Types

AL: U of S Alumni

An undergraduate student who has already earned a baccalaureate degree at The University of Scranton and is pursuing a second undergraduate academic goal.

CE: Continuing Education

A student pursuing a non-credit educational opportunity at The University of Scranton. A student enrolled in one of these opportunities is not considered enrolled in a formal degree program or in pursuit of a formal academic credential.

Note: the CE code was created in 2017 to identify students in the Nonprofit Leadership Certificate Program offered by the Kania School of Management.

FR: Freshmen

A student who has no prior postsecondary experience attending for the first time at the

A student who is transferring from another institution with the intention of pursuing a degree/certificate.

First Generation Student

Beginning in fall 2016, the University adopted the Common Application as its exclusive application for undergraduate education following Federal guidelines, as defined under the Higher Education Act of 1965, to classify students as first-generation students.

- (A) An individual both of whose parents did not complete a baccalaureate degree; or
- (B) In the case of any individual who regularly resided with and received support from only one parent, an individual whose only such parent did not complete a baccalaureate degree; or

Responsibilities in the Event of a Student Death

- A. O ZJW cZShi XYbhFcfa Uhcb UbX CUa di gL JZY,]b Wzbg `hUhcb k]h gi XYbhg D Yubhg Office, notifies:
admissions@scranton.edu, finaid@scranton.edu, registrar@scranton.edu,
paymaster@scranton.edu, res-life@scranton.edu, operations-update@scranton.edu
 (advancement), royalcard-admin@scranton.edu, bursar-admin@scranton.edu
- B. Registrar
1. Close academic record, including flagging deceased indicator and deceased date
 2. Inactivate all addresses
 3. Prorate tuition and refund, if policy allows, and then notify Bursar and Fin Aid
 4. Contact Bursar to hold all bills
 5. Consider whether posthumous degree should be awarded in a future term
 6. Confirm record deactivation on email distribution list
- C. Financial Aid
1. Director reviews if there is any aid.
 2. Review for Return of Title IV Refund funds if student currently enrolled and has federal aid.
 3. Review of Loans:
 - Pull NSLDS for federal loans (Stafford, PLUS, Grad PLUS), financial aid office contacts the servicer of the loans to let them know the date of death and obtain the contact information where the family can send a copy of the death certificate to start the process of having the loans discharged due to death.
 - If the student has a PERKINS loan, financial aid office contacts Assistant Bursar and advises of death.
 - If other federal loans are involved, Financial Aid also includes the PERKINS servicer information in the letter referenced below (4).
 - If Alternative Loan, review SIS to determine the Alternative Loan the student received, financial aid office contacts the lender of the loans to let them know the date of death and obtain the contact information where the family can send a copy of the death certificate to start the process of having the loans discharged due to death.
 4. The Director of Financial Aid sends a letter to the deceased parent(s) giving our condolences. This occurs about 3 weeks after the initial notification. The letter provides an explanation of the following that apply:
 - Title IV Federal Aid calculation performed
 - University of Scranton Institutional, State and Federal aid adjustment
 - Tuition credit that was or was not applied
 The letters also includes:
 - Copy of student account infcfa Uhcb hUhF]bUbWU A]X Ug_g hY Bi fgurhg O ZJW to prepare.

Contact information for Federal Stafford, PLUS, Graduate PLUS servicer or Alternative Loan Lender for copies of the death certificate to be sent.
 Director of Financial Aid contact information for additional questions.

- D. Bursar
 1. Hold all student bills and collection communications
 2. Contact servicer of Perkins loan(s), if applicable
- E. Payroll
 1. Arrange for any wages owed to be sent to family
- F. Residence Life
 1. Deactivate student record in Housing software
- G. Advancement
 1. CcbhUMRY[]grUng O Z]W]Zgi XYbh]s not marked deceased in Banner
 2. AX↑ gngi XYbh]g Xcbcf W]Y[cfm
 3. AXX YI W] g]cb WcXY cZN CL k]h Wc a YbhI XYWUgYXI
 4. PfcWgggi XYbh]g dUFYbh]g UWtFX]ng to Operations guidelines
- H. IT
 1. Automated weekly process to inactivate addresses (except TX address type), email address and telephone numbers for anyone identified as deceased in the system.
 2. The RoyalCard Office will inactivate the Royal Card and w]` k cf_ k]h hY Bi fgUng cZ]W to return any funds that remain on account.
 3. Account de-provision follows the timeline in place for all students.
- I. Admissions
 1. D YWUgYX gi XYbh]k]h Ub UXa]gg]cbg g]h] g cZ] d fcd]W] UFY fYa cj YX Zfca hY S`U]Y system.
 2. D YWUgYX gi XYbh]k \c \U Y Ub UXa]gg]cbg g]h] g cZ]]bei]fni cf I Udd`]W]h] UFY []j Yb U deceased indicator in Slate. Also, all email and phone numbers for those students are removed from the Slate system.

Date	Audit Trail of Changes
December, 2018	Procedures accepted by ATAC-Data Governance Group
August, 2021	Emergency Contact Missing Person Contact section added

