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# **Sam Houston State University**

## **Guidelines for**

### **Data Standards, Data Integrity and Security**

This Data Standards Document is a work in progress and is subject to change. To ensure that the most current version is readily available, it is included on the Sam Houston State University web page at <http://www.shsu.edu/~ERP/TrainingFAQs.html>.

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# Table of Contents

<i>Purpose</i> .....	2
<i>Scope of this Document</i> .....	2
<i>Definitions</i> .....	2
<i>Administrative Responsibility</i> .....	3
<i>Data Custodian Responsibilities</i> .....	3
<i>Data Owners</i> .....	4
<i>Individual Responsibilities</i> .....	5
<i>Access to Sam Houston State University Data</i> .....	5
<b>Data Change Rules</b> .....	<b>5</b>
<i>Change Data</i> .....	5
<b>General Guidelines for Searching</b> .....	<b>5</b>
<i>Record Creation Considerations</i> .....	5
<i>Searching</i> .....	6
<i>Wild Card Searches</i> .....	6
<i>Case and Space Sensitivity</i> .....	6
<i>Prefix Searches</i> .....	6
<i>Multiple Records</i> .....	6
<i>Common Names</i> .....	7
<i>Instructions for Searches</i> .....	7
ID Search .....	7
Person Name Search .....	7
<b>Data Standards - General</b> .....	<b>7</b>
<b>General Person Information</b> .....	<b>8</b>
<i>Clean and Accurate Records</i> .....	8
<i>Date Standards</i> .....	8
Calendar Dates .....	8
Date of Birth .....	8
<i>Identification Number Standards</i> .....	8
Additional Identification Numbers .....	9
<i>Veteran File Number</i> .....	9
<i>Name Standards</i> .....	9
Unicode Support .....	<b>Error! Bookmark not defined.</b>
Last Name .....	9
First Name .....	10
Middle Name .....	10
Prefixes .....	10
Suffixes .....	10
Preferred First Name (Optional) .....	11
Non-Person Name/Vendor .....	11
<i>Address Standards</i> .....	12
Address Change Source .....	12
Address Types .....	12
Street Standards .....	12
City Standards .....	13

State & Province .....	13
County Codes .....	13
Nation Code Standards.....	13
International PIN Numbers .....	13
Military Standards .....	14
Air Force Base (AFB) .....	14
Foreign Military Address .....	14
<i>Telephone Numbers.....</i>	<i>14</i>
General .....	14
Telephone Types .....	14
General Telephone Types.....	14
Address Telephone Types .....	14
Telephone Numbers .....	15
Area Code.....	15
Phone Number.....	15
Extension.....	15
International Telephone Numbers .....	15
International access code field .....	15
Country Code .....	15
City Code .....	15
North American Numbering Plan (NANP) .....	15
<i>Email Address Type.....</i>	<i>16</i>
<i>Bank Routing Number.....</i>	<i>16</i>
<i>Deceased Indicator .....</i>	<i>16</i>
<i>Confidential Information Indicator .....</i>	<i>17</i>
<i>Name Types .....</i>	<i>17</i>
<b>Appendix 1 – Address Type.....</b>	<b>18</b>
<b>Appendix 2 – Street Abbreviations.....</b>	<b>19</b>
<b>Appendix 3 – Secondary Unit Designators.....</b>	<b>21</b>
<b>Appendix 4 – States, Canadian Provinces &amp; Overseas Military .....</b>	<b>22</b>
<b>Appendix 5 – Compass Directions .....</b>	<b>23</b>
<b>Appendix 6 – Telephone Types .....</b>	<b>24</b>
<b>Appendix 7 – Prefix Abbreviations.....</b>	<b>25</b>
<b>Appendix 8 – Suffix Abbreviations.....</b>	<b>26</b>
<b>Appendix 9 – Race and Ethnicity Codes .....</b>	<b>27</b>
These codes represent the values that are received via EDI. They will be translated to the appropriate codes for IPEDS and State Coordinating Board reporting. ....	27
<b>Appendix 10 – Email Address Type .....</b>	<b>28</b>
<b>Appendix 11- Address Change Source Type.....</b>	<b>29</b>
<b>Appendix 12 – County Codes .....</b>	<b>30</b>
<b>Appendix 13 – Marital Status .....</b>	<b>31</b>

## Data Integrity Guidelines

### Purpose

These guidelines define the responsibilities of everyone accessing and managing enterprise operational data. Offices may have individual guidelines that supplement, but do not supplant or contradict, this statement. Data entrusted to the institution by other organizations (e.g., foundations and governmental agencies) is governed by terms and conditions agreed upon with those organizations. Specific issues not governed by such agreed terms shall be governed by the guidelines set forth in this document.

These guidelines were developed to ensure database integrity, regulatory compliance, and security controls, and to achieve the goals of efficient, professional, and cost-effective communication for the Sam Houston State University community by:

- avoiding creation of duplicate records for a single entity;
- providing complete General Person information in a timely manner, with an audit trail of changes;
- using standard entry to facilitate consistent reporting and searches;
- sharing effective processing discoveries and problem-resolution scenarios; and
- taking advantage of the database capabilities and functionality.

### Scope of this Document

This document defines the standards for maintaining the integrity of Sam Houston State University information. It covers the format and usage of data elements that are shared between systems and those that are common to enterprise operational systems and generally referred to as the General Person data. While defining who has access and how to obtain access to this information is critical to the operation of the institution, it is better left to operational procedure manuals. This document is written specifically for those individuals that have update capability and therefore can seriously affect the integrity of the information. This information will also be helpful for those with inquiry access to the information to further understand the reason for certain formats of information.

### Definitions

**Banner:** Banner is an enterprise resource planning software system owned by SunGard and includes the following systems: financial aid; finance; student; human resource/payroll; document management; enrollment management; workflow; degree audit; and data warehousing.

**Enterprise Operational Systems:** This includes software systems and associated hardware infrastructure that support operation data management systems including financial aid management; budget, finance and procurement management; student recruitment, admissions, registration and records management; human resource and payroll management; residential living; and the related information resource infrastructure.

**General Person:** General Person is a Banner term that relates to all person or person-like entities, including students, faculty, staff, alumni, vendors, companies, and corporations. Any person in the system can ultimately be tied back to the main general person tables (*i.e.*, SPRIDEN, SPBPERS, SPRADDR, SPRTELE, SPREMRG, GOREMAL) via a PIDM.

**Patch/Upgrade Management:** The process of controlling modifications to hardware, software, firmware, and documentation to ensure that the enterprise operational systems are protected against improper modification before, during, and after system implementation.

**PIDM:** The term PIDM (Person Identification Master) is related specifically to Banner and how different data tables are tied together in the database. A PIDM is simply a unique numeric system identifier that is not normally visible to users of the system. Every entity associated with the university---whether student, employee, vendor, prospect, alum, or friend has a PIDM associated with General Person data. The PIDM is used in all tables associated with a person or other entity; this allows us to change demographic information for a person-including SSN-without affecting the underlying database table connections.

**Security Roles:** Security roles are established based on job function such as purchasing assistant, accounting clerk, administrative coordinator, faculty, cashier, etc. Specific capabilities will be assigned to each security role. For example, the registration clerk would have update access to registration, but only inquiry to student accounts. Each user will be assigned a role or several roles depending on their particular needs as established by their division/department head or his/her designee and as approved by the Data Custodian(s). A list of available security roles and their functions will be made available online. This list is a dynamic document that will not be given out in hardcopy form to ensure that everyone has access to the most current list.

**Third Party Software Systems:** Third party products include any vendor delivered software system or in house developed programs with interfaces or shared data elements to Banner. These include but are not limited to “SamWeb” programs; parking systems; cashiering systems; residential living management; employee applicant, job description and performance evaluation systems; student recruitment systems; job scheduling; course management systems; reporting tools; and forms management.

## **Administrative Responsibility**

By law, certain data is confidential and may not be released without proper authorization. Users MUST adhere to any applicable federal and state laws as well as Sam Houston State University policies and procedures concerning storage, retention, use, maintenance, release, and destruction of data.

Electronic data is a vital asset owned by Sam Houston State University. All institutional data, whether maintained in the central database or copied into other data systems (e.g., personal computers) or formats remains the property of Sam Houston State University. Access to data is not approved for use outside a user’s official institutional responsibility. Data will be used only for legitimate Sam Houston State University business. IT@Sam (Office of Information Technology Services) policies are located on the Sam Houston State University website.

As a general principle of access, Sam Houston State University 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.

Division/department heads 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.

Division/department heads will ensure a secure office environment with regard to enterprise operational systems. Division/department heads shall validate the access requirements of their staff according to their job descriptions before submitting the enterprise operational system ***Access Request Form*** to the appropriate Data Custodian.

All procedures and enterprise operational systems will be constructed to ensure that:

- all data is input accurately;
- the appropriate internal security controls match the risk and required security;
- data accuracy and completeness is maintained;
- system capabilities can be re-established after loss or damage by accident, malfunction, breach of security, or natural disaster; and
- actual or attempted security breaches can be controlled and promptly detected.

## **Data Custodian Responsibilities**

The Data Custodian is the individual designated by the Data Owner to be responsible for management of data within specific modules of Banner. The responsibility for maintaining and controlling Banner validation and rules tables resides with the Data Custodians. These tables and related processes define how business is conducted at SHSU. The Data Custodian is also responsible for initiating and overseeing related software patch and release planning which includes reviewing release documents, coordinating installation of patches and upgrades with IT@Sam (for both development and production systems), and conducting standardized test plans in the

development system with each release. Each Data Custodian is a member of the Data Standards/Data Management Committee.

The Data Custodian may make data within his/her area or responsibility available to others for the use and support of the office or department's functions. Before granting access to data, the Data Custodian must agree that a "need to know" is clearly demonstrated and that appropriate security training is (or has been) provided. By approving user access to SHSU data, the Data Custodian consents to the use of that data within the normal business functions of administrative and academic offices or departments.

Data Custodians are responsible for the accuracy and completeness of data files in their areas. Misuse or inappropriate use by individuals will result in revocation of the individual's access privileges.

### ***SHSU Data Custodians***

Academic Affairs: Assistant Vice President for Academic Affairs

Graduate Admissions: Staff Associate II

Undergraduate Admissions: Director of Undergraduate Admissions

Purchasing & Property: Associate Vice President for Business Services

Budgeting: Director of Budget

Student Records: Registrar

Banner General: Director of Enterprise Services

Financial Aid: Director of Financial Aid

Residence Life: Director of Residence Life

Human Resources: Associate Vice President for Human Resources and Risk Management

Payroll: Director of Payroll and Tax Specialization

Bursars Office: Controller

Financial Reporting: Controller

### **Data Owners**

Data Owners, by virtue of their position at SHSU, have ultimate responsibility for the security, accuracy and confidentiality of data within their areas of accountability. Data Owners generally will delegate responsibility of Banner security role management to Data Custodians including granting inquiry, data entry and update privileges, and defining business processes. If the Data Custodian denies access, the division/department of the user may submit a ***Request for Data Access Review*** to the respective Data Owner. Data Owners must review the ***Request for Data Access Review*** and affirm or override the denial decision. The ***Request for Data Access Review*** must include the original request, the denial notification from the Data Custodian and a brief justification for requesting the reconsideration of the denial.

Data Owners are ex-officio members of the Data Standards/Data Management Committee.

### ***SHSU Data Owners***

Finance and Operations: Vice President, Finance and Operations

Student and Enrollment Management: Vice President, Enrollment Management

Academic Affairs: Associate Provost

Banner General: Associate Vice President, Information Technology

### ***Additional Ex-Officio Members of the Data Standards/ Data Management Committee***

Audits & Analysis: Director, Audits & Analysis

Institutional Research & Analysis: Director, Institutional Research & Assessment

## **Individual Responsibilities**

Individuals to whom Data Custodians grant access are accountable to the Data Custodians for their use of the data. Any individual granted access to data resources is required to acknowledge by signature that they understand all policies related to data access and usage of electronic information resources.

Users **MUST** protect data files from unauthorized use, disclosure, alteration, or destruction. Users are responsible for the security, privacy, and control of data to which they have access. The user is responsible for all transactions occurring during the use of their log-in identification (ID) and password. ***Employees are not to loan or share any form of access and/or credentials with anyone.*** If it is discovered that any form of access and/or credentials are being loaned or shared, employees who are assigned access to records are subject to disciplinary action in accordance with University policy.

## **Access to Sam Houston State University Data**

Data security is every user's responsibility. Enterprise operational system classifications will be established based on job function such as personnel representative, fiscal assistant, faculty, cashier, etc. Specific capabilities will be assigned to each classification. Each user will be assigned a classification or possibly several classifications, depending on their particular needs as established by their division/department head and approved by the Data Custodian(s).

## **Data Add/Change Rules**

Changes to any record and/or record additions cannot be made without proper documentation and approval from the Data Custodian. The following rules govern which office makes General Person record changes or additions in the enterprise operational system. These rules are subject to changes as new procedures are defined and implemented.

Name and/or social security number changes or additions will be processed by the Payroll Office with the appropriate documentation.

Changes or additions to vendor records will be made by Disbursements & Travel with the appropriate documentation.

## **Change Data**

- **Make data additions/changes only with the authority and approval from the Data Custodian;** follow the procedures established by the Data Custodian of the data needed to be changed.
- Some data fields have specific data entry rules. See the General Person Information section for those data entry rules.
- **Special characters:** The pound sign (#), percent sign (%), ampersand (&), underscore (\_), left square bracket ([) and right square bracket (]) are not to be used. The "at" sign (@) is not to be used except in the case of established, documented vendor names or within email addresses.

## **General Guidelines for Searching**

### **Record Creation Considerations**

Duplication of General Person records creates data integrity errors across multiple areas of the enterprise operational system. **Do not duplicate an existing General Person record.** Common Matching rules have been developed for all areas, and this process is to be utilized when creating new records. Searching should be utilized to identify existing records and prevent duplication.

## Searching

The steps for performing a record search differ from system to system, using different forms to look for existing records and others to check address information. The following information applies to all systems:

- use a social security number to search, if available; or
- if a social security number search reveals no records, search for the person (or vendor) using the name. The first few letters of the name followed by the wild card (%) can be used if the full name is unknown.

## Wild Card Searches

In searching for a record, use the Oracle wild card (%). Using the wild card allows one to enter part of the name, search for a name with and without spaces, or search for a name that might have been spelled differently in an earlier entry.

The Oracle wild card is the symbol %. To Banner, this symbol stands for any letter, number, or symbol; or any group of letters, numbers and symbols.

- To search for a name which may be Griffith or Griffin, type in, for example, Griff% in the last name field and execute query. This causes the Banner system to display all names starting with Griff.
- To search for an employee named MacDuff whose name might begin with Mc or Mac and might include a space or not, search %uff.

## Case and Space Sensitivity

Some forms in the Banner system allow a choice between a case sensitive search and a case insensitive search. Case sensitive searches distinguish between upper-case letters and lower-case letters entered as search criteria. For example, a case sensitive search for %Beth would return MacBeth but not Macbeth. ***When possible, always opt to do a case insensitive search.*** Generally, this is accomplished by clicking the “No” radio button under the “Case Sensitive Query” label. In doing case insensitive searches, the likelihood of finding the person or organization of interest will increase. Moreover, the possibility that the same person or organization will be entered more than once into the system is reduced.

## Prefix Searches

When searching for a prefix name (such as McDonald or Da Vinci), use the wild card and no space in place of the prefix to check for all possible versions of the name. %onald will find MacDonald, Mac Donald, McDonald, and Mc Donald.

## Multiple Records

Banner maintains all versions of a person’s name and ID. When a person changes their name or ID, Banner registers the change but keeps the old information in the database. This makes it possible to find someone using the old name or ID information.

Only the record with the most recent name and ID information is current. To determine the current record, check the change indicator in the Change Field [CHG], the farthest right column of the search form.

- No entry in the Change Field indicates the current record for that person.
- **I** in the Change Field indicates that the ID in this row has been changed. This row shows the old ID.
- **N** in the Change Field indicates that the name in this row has been changed. This row shows the old name.

Note: Although Banner displays names and IDs which are not current in query results, it always returns an individual’s or organization’s current name and ID when that individual or organization is selected for further processing or review.



## Common Names

In the case of a common name, a duplicate entry may not indicate another record for the same person. (For example, there may already be a different Jennifer Smith in the system.) To determine whether a name belongs to the correct person, check the person's address or other available information.

## Instructions for Searches

### **ID Search**

Select an identification number: (i.e., IDEN or VEND) form in the Banner module.

### **Person Name Search**

Searches **MUST** be completed from an IDEN form because these are in **ALL** general person records. FTIIDEN or FOAIDEN displays both Person and Non-person records. For IDEN screens, LIST of VALUES searches for Person records; COUNT QUERY HITS searches for non-person records. Searches from other screens restrict the information to records associated with the module.

Type in the name to be searched using the % (wildcard) to broaden the search.

Example: record = Sammy Bearkat

Query as: Last Name – Bearkat First Name – S%

Some names have unique spellings. Search on all possibilities by broadening the wildcard search.

When a list of possible names is retrieved for a person, verify social security number, student ID number, birth date, previous names, and any other information available. **REMEMBER TO SEARCH FOR BOTH FULL AND COMMON VERSIONS OF NAMES.** For example: William as well as Bill; Lawrence as well as Larry.

The underscore (\_) key can be used to replace one character at a time. For example, to search for Anderson that may actually be Andersen use: Anders\_n --- This will find both Anders**O**n and Anders**E**n records.

See the Basic Banner Navigation Guide for explicit instructions on searching.

## **Data Standards - General**

- **Search first**---before creating a new record. Use the Common Matching form (GOAMTCH) to search for matching records, utilizing the rules defined in the departmental procedures.
- Duplicate records (i.e., the same person or vendor in the system under more than one id number) are unacceptable
- To provide accurate and pristine records, the following steps should be taken. Use proper keyboard characters when entering numeric data. Use a numeric 1 (one) not a capital "I" (i) or lowercase "l" (L). Use a numeric 0 (zero), not a capital "O" (o).
- Changes or additions to data may only be made if the user has institutional authority to do so and follows explicit directions outlined by the Data Custodian. [See Data Add/Change Rules section.]
- Specific processing entry rule definition—Drop down boxes are to be used whenever possible. Some fields are associated with rule validation processing.
- Enter data using mixed case (uppercase and lowercase), following appropriate capitalization rules.
- **Special characters:** The pound sign (#), percent sign (%), ampersand (&), underscore (\_), left square bracket ([) and right square bracket (]) are not to be used. . The "at" sign (@) is not to be used except in the case of established, documented vendor names or within email addresses.
- Hyphens may be used.

- The ampersand (&) may be used in certain cases (e.g., AT&T). Otherwise, use the word “and.”
- Slashes may be used to clarify or designate a fraction. For example, ‘in care of’ should be entered c/o. Do not use the percent sign (%) or spell out ‘in care of.’

## General Person Information

Adhere to the following guidelines for all person records added to the Banner system.

### Clean and Accurate Records

Search First: Before creating a new record for a person or vendor, the Common Matching process to identify any potential matches MUST be utilized. Before eliminating any potential matches, review the person or vendor data in several forms, reviewing data carefully before creating a new record. Each user in every office MUST conduct a thorough search to prevent entering a duplicate record.

Enter all new vendors as non-persons.

### Date Standards

#### Calendar Dates

Dates can be entered in various ways, using the following data standards. All dates must be entered as month, day, and year. Verify all dates to be sure that the month and day are not transposed and the year reflects the applicable century. Allowable data entry formats include:

- MMDDYY (031008 = 10-MAR-2008)
- MM-DD-YY or MM/DD/YY (use of hyphens or forward slash)
- DD-MON-YEAR

The entry month (MM) must be the month’s two-digit number in the calendar year using a preceding zero (0) if the number is less than 10 (October).

The entry day (DD) must be the two-digit day of the month using a preceding zero if the number is less than 10.

The Banner system will convert the entered dates to a DD-MON-YYYY format. The month (MON) format is abbreviated to the first three letters of the month’s name.

Examples:

April 15, 2003: enter as 04-15-2003; enterprise operational system converts to 15-APR-2003.

**NOTE: When a date is required but not available, all departments are to use the same institutionally defined date such as 01-01-1000.** Records containing this date will be identified and corrected (if possible) by the responsible departments annually.

#### Date of Birth

The Date of Birth must be entered following the Calendar Date Standards. **When a birth date is required but not available, use the same institutionally determined date such as 01-01-1100.** Records containing this date will be identified and corrected (if possible) by the responsible departments annually.

For employees, Human Resources will maintain this information. For students, the Admissions Office, Financial Aid, and the Registrar’s Office will maintain this information. For donors, the Advancement Office will maintain this information.

### Identification Number Standards

The format of the Banner ID is 000 000 000.

## Additional Identification Numbers

The Additional Identification Table (GORADID) allows any number of extra IDs for a person to be stored. Each Additional ID must be assigned an ID Type. The **Additional ID** tab on Banner identification forms displays the Additional ID information. The Additional ID tab will be available on any Identification Form (XXXIDEN).

Additional Identification Type Validation form (GTVADID). Examples are listed below:

Additional ID Type	Description
DUPE	Dufinder Duplicate
PARK	Parking System ID
HS	High School Transcript ID (PEIMS, etc.)
HOB	Hobson's ID

## Veteran File Number

The Veteran File Number, a required field, is used to maintain a person's veteran identification number. A person's veteran file number is entered on the General Person Form. This information is collected and maintained for students by the Veterans Affairs Office.

## Name Standards

**The only punctuation allowed within any name field will be the hyphen and the apostrophe. No periods are to be used in any name field.**

When a new person is being entered into Banner and that new person has a previous name that is deemed necessary to be recorded, enter the previous name into the system FIRST and save the record. Change the name using Banner's name change procedure on the XXXIDEN form. If a previous or alternate name is identified after the creation of the general person, then this information should be inserted under the "alternate name" field, along with name type, in the applicable XXXIDEN form.

## Last Name

- All information is to be entered using **mixed case** (standard combination of upper and lower case letters).
- Enter the spelling and format of the last name as supplied by the person and using standard capitalization rules.
- **Hyphens** may be used to separate double last names. However, if there are two last names that are not hyphenated (e.g., Monica Lou Creton Quinton), Monica would be input at the first name, Lou would be input as the middle name and Creton Quinton would be input as the last name.
- The legal name field, not to be confused with the legal name **type**, will not be used or maintained by any office, or module. 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. The Legal Name field cannot be used as the basis for database searches.
- **Apostrophes** may be used in such names as O'Leary, O'Connor, etc.
- **Spaces** are permitted if the spelling and format of the names includes spaces. (e.g., Mc Donald, Mac Phearson, St John, Van der Linder).
- **Titles, prefixes and suffixes** in the last name field are not to be used (e.g., Dr, Mr, Ms, III, Jr, MD, etc.).
- **Special characters:** The pound sign (#), percent sign (%), ampersand (&), underscore (\_), left square bracket ([) and right square bracket (]) are not to be used because they have other functions in Oracle. The

“at” sign (@) is not to be used except in the case of established, documented vendor names or within email addresses.

## First Name

- All information is to be entered using **mixed case** (standard combination of upper and lower case letters).
- Enter the spelling and format of the first name as supplied by the person and using standard capitalization rules.
- Any **single character** first name should be entered without a period. In those cases where a single character first name is designated as the first name and followed by a middle name, place the single character in the first name field and the middle name in the middle name field.
- **Hyphens** may be used to separate double first names. However, if there are two first names that are not hyphenated (e.g., Mary Ann Louise Smith), Mary Ann would be input at the first name, Louise would be input as the middle name and Smith would be input as the last name.
- **Apostrophes** may be used in such names as O’Leary, O’Connor, etc.
- **Spaces** are permitted if the spelling and format of the names includes spaces. (e.g., Bobby Jo, Mary Kate)
- **Titles, prefixes and suffixes** in the first name field are not to be used (e.g., Dr, Mr, Ms, III, Jr, MD, etc.).
- **Special characters:** The pound sign (#), percent sign (%), ampersand (&), underscore (\_), left square bracket (l) and right square bracket (j) are not to be used because they have other functions in Oracle. The “at” sign (@) is not to be used except in the case of established, documented vendor names or within email addresses.

## Middle Name

- All information is to be entered using **mixed case** (standard combination of upper and lower case letters).
- Enter the spelling and format of the middle name as supplied by the person and using standard capitalization rules. Do not include periods.
- If **no middle name** exists, leave the field blank.
- Any **single character** middle name should be entered without punctuation. In those cases where there are two initials (e.g., John A H Smith), enter both and without periods after each initial.
- **Hyphens** may be used to separate double middle names.
- **Apostrophes** may be used.
- **Spaces** are permitted if the spelling and format of the names includes spaces.
- **Titles, prefixes and suffixes** in the middle name field are not to be used.
- **Special characters:** The pound sign (#), percent sign (%), ampersand (&), underscore (\_), left square bracket (l) and right square bracket (j) are not to be used because they have other functions in Oracle. The “at” sign (@) is not to be used except in the case of established, documented vendor names or within email addresses.

## Prefixes

- All information is to be entered using **mixed case** (standard combination of upper and lower case letters).
- Enter the spelling and format of the prefix as supplied by the person and using standard capitalization rules. Do not include periods.
- See Appendix 7 for a listing of Prefix Abbreviations.
- Enter only the prefix in the prefix field. Do not put the prefix in the first, middle or last name fields.

## Suffixes

- All information is to be entered using **mixed case** (standard combination of upper and lower case letters).

- Enter the spelling and format of the suffix as supplied by the person and using standard capitalization rules. See Appendix 8 for a listing of Suffix Abbreviations.
- Enter only the suffix in the suffix field. Do not put the suffix in the first, middle or last name fields. Do not include periods.
- Both a prefix and suffix are used when there is 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 in religious orders (e.g., Gen Frank Smith USA (Ret)).
- A suffix indicating an academic or medical degree is not used when the prefix is entered. 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.

### Preferred First Name (Optional)

- If a person wishes to be known by something other than his/her legal first name, enter this name into the preferred first name field (e.g., Joyce Elizabeth Smith). If this person goes by 'Betsy', then enter 'Betsy' into the preferred name field.
- All information is to be entered using **mixed case** (standard combination of upper and lower case letters). Enter the spelling and format of the preferred name as supplied by the person and using standard capitalization rules.

### Non-Person Name/Vendor

- All information is to be entered using **mixed case** (standard combination of upper and lower case letters).
- Generally do not abbreviate unless required by space limitations. When abbreviations are required use the USPS Publication 28 Postal Addressing Standards at <http://pe.usps.gov/cpim/ftp/pubs/Pub28/pub28.pdf>.
- Punctuation is allowable in the vendor name if it is part of the legal name or the vendor requires it (e.g., Amazon.com).

Enter the spelling and format of the name as supplied by the vendor and using standard capitalization rules. Companies that are recognized by their acronyms should be entered using their acronym (e.g., IBM, SunGard SCT, and ITT). Do not use a space between the letters of an acronym.

- **Hyphens** may be used to separate double names.
- **Numerals** are permitted in the vendor name.
- **Apostrophes** may be used in names such as O'Charley's, O'Sullivan, etc.
- The **ampersand** (&) can be used **only** when part of a formal name (e.g., Baltimore & Ohio Railroad). Use 'and' in all other cases.
- **Abbreviations** are allowed for Co, Corp, Ltd or Inc when used after the name of a corporate entity.
- Companies that are recognized by their acronyms should be entered using their acronym (e.g., IBM, SCT, and ITT). Do not use a space between the letters of an acronym.
- **Spaces** are permitted if the legal spelling and format of the names includes spaces.
- **Special characters:** The pound sign (#), percent sign (%), ampersand (&), underscore (\_), left square bracket ([) and right square bracket (]) are not to be used because they have other functions in Oracle. The "at" sign (@) is not to be used except in the case of established, documented vendor names or within email addresses.

## Address Standards

Addresses should conform to U.S. Postal Service standards, many of which are listed in the Appendix at the end of this document.

For additional information on address standards required by the U.S. Postal Service, check their Web site at [www.usps.gov](http://www.usps.gov).

Address abbreviations in the appendix agree with USPS Publication 28 Postal Addressing Standards at <http://pe.usps.gov/cpim/ftp/pubs/Pub28/pub28.pdf>.

Multiple addresses can be entered for a person or vendor using different address types. Address standards have been established cooperatively so that address types are used consistently. See the Appendices for Address Type and Phone Type descriptions.

Before entering a new address, set the “to date” and check the inactive address box. This is not necessary when making corrections to an existing address.

## Address Change Source

The address change source type indicates the source of an address which comes from a batch load of data or is self-reported. Valid values are in Appendix 11. Unless the change of address is a correction due to an initial data entry error, address changes will be processed as an inactivation of the current record (end date and inactive box checked) and the insertion of the new address.

## Address Types

Addresses are entered on the **General Person** form in the address information blank. Address types are defined by the characteristic of the address, not by the office that uses the address. The address type is based on the recipient address, not the sending office address. See Appendix 1 for more information about address types.

## Street Standards

- All information is to be entered using **mixed case** (standard combination of upper and lower case letters).
- Hyphens and slashes may be used when needed for clarity or designated fractions.
- Do NOT leave blank lines between street address lines.
- Do not include periods in an address.
- **Special characters:** The pound sign (#), percent sign (%), ampersand (&), underscore (\_), left square bracket ([]) and right square bracket (]) are not to be used because they have other functions in Oracle. The “at” sign (@) is not to be used except in the case of established, documented vendor names or within email addresses.
- ‘In care of’ should be entered as ‘c/o’. Do NOT use the % sign or spell out ‘in care of’.
- The address format allows four lines of street address information. If a separate street address and PO Box number address need to be maintained, enter them as two separate address types.

Example:

Information Provided	Mailing Address	Primary Address
John F Smith	John F Smith	John F Smith
PO Box 2351, 1379 NW Pine	PO Box 2351	1379 NW Pine
Portland, OR 97203	Portland, OR 97203	Portland, OR 97203

**Unit Numbers for Apartment, Building, Suite, etc.** - The pound sign (#), percent sign (%), ampersand (&), underscore (\_), left square bracket ([]) and right square bracket (]) are not to be used because they have other functions in Oracle. The “at” sign (@) is not to be used except in the case of established, documented vendor names or within email addresses.

**Secondary Address Unit Designators** - If the address is a multi-unit apartment or building, place the room, suite, or apartment number to the right of the street address. If the secondary unit designator is not provided, and only a pound sign (#) along with the number is provided (i.e., 3454 N Jones #4), remove the pound sign (#) and leave a space. **NEVER** use the pound sign (#). See the Appendix 3 for the Secondary Address Unit Designators and Appendix 5 for Compass Direction abbreviations.

**Street Address and PO Box** - Banner address format allows three lines of street address information. Three address lines cause a problem when printing one-inch labels. Do not enter data into the second address line until data has been entered into the first address line. Do not use both a street **and** PO Box for an address; choose one. See Appendix 2 for Street Address abbreviations.

### City Standards

All information is to be entered using mixed case (standard combination of upper and lower case letters). Do NOT abbreviate unless limited by allowable characters. City names are to be entered without periods.

### State & Province

State codes **MUST** be entered for all U.S. and Canadian addresses. Refer to Appendix 4 for the appropriate U.S. state and Canadian provinces codes.

### County Codes

See Appendix 12 for the table of valid county codes.

Zip codes **MUST** be entered for all United States and Canadian addresses.

United States	Enter the 5- digit zip code. When the 9-digit zip code is available, place a hyphen between the first 5 and last 4 digits. The hyphen is required.
Canadian	Enter the six character zip code without hyphens or spaces.
International Postal Code	Enter the international address as supplied. The Postal Code would be entered on the same line as the city.

Examples:

Cheng Li	Bader H Al-Khalifia
7-301 Houji/ Middle of JiangNan Road	c/o Aramco
Guang Zhou 510240	Dhahram 31311
China PRC	Saudi Arabia

### Nation Code Standards

A NATION code is required for all non-U.S. addresses. Do **NOT** enter a NATION code for U.S. addresses.

### International PIN Numbers

Enter the six-digit international pin number (without hyphens) to the right of the city on the second address line. **Do NOT enter the PIN number in the zip code field.** In the event the PIN number will not fit to the right of the city because of space, enter the city on the third address line and enter the PIN number in the city line.

Example: Petko Metodiev Kitano  
PO Box 140

Balgoevgrad Hyderab 270011  
Bulgaria

## **Military Standards**

### **Air Force Base (AFB)**

Enter the City into the City Field followed by AFB (all CAPS) for Air Force Base.

Example: 5 202A 2nd St  
Elmendorf AFB  
AK 99506-1207

### **Foreign Military Address**

Enter the APO or AFO code into the CITY field.

In the State Field enter:

AE - Europe, Middle East, Africa, Canada	[ZIP=09nnn]
AP - Pacific	[ZIP=96nnn]
AA - The Americas (excluding Canada)	[ZIP=34nnn]

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

See Appendix 4 for the Overseas Military abbreviations.

## **Telephone Numbers**

### **General**

An entity (person or non-person) may have multiple telephone numbers within the Banner system. Telephone numbers should be accurate and reflect the most recent data received. Supplemental information for international phone numbers may be added in the international access code field. Banner forms used to maintain telephone numbers are: APATELE, FOATELE, PPATELE, RPATELE and SPATELE.

When adding a subsequent telephone number of the same type, the prior telephone number should be end dated and the new telephone number added. Unless making a correction due to an initial entry error, do not change or delete the prior telephone number.

Telephone numbers, while displayed on SPAIDEN with the address, are not stored with the address in the enterprise operational system tables. Additional telephone numbers, not associated with an address type must be entered/updated on the telephone tab (SPATELE) of the SPAIDEN form.

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

All regional and local telephone numbers, including on-campus phone numbers, are to be entered using the ten-digit format.

### **Telephone Types**

A telephone type distinguishes each telephone number entered in the enterprise operational system system. Telephone types are defined by the characteristic of the telephone, not by the office that uses the number.

### **General Telephone Types**

This is a telephone number associated with a person or a non-person that is not related to a specific address. See Appendix 6 for the table of valid general telephone types.

### **Address Telephone Types**

This is a telephone number associated with each specific address of the same type. Each address type defined in General Person will have a like Address Telephone Type defined. Address Types are defined in Appendix 1.



## Telephone Numbers

### Area Code

The three-digit area code must be entered for all phone numbers including the local areas, i.e. 936, 713, 281, etc.

### Phone Number

Enter the seven-digit number without inserting a hyphen.

Example: 4871849

### 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: 7300, 1764

## International Telephone Numbers

International telephone numbers consist of four to seven digits.

### International access code field

International telephone numbers should include the country and city codes as part of the international access code field.

### Country Code

The country code consists of one to four digits and is required (e.g., 876)

### City Code

The city code consists of one to three digits. Not all countries utilize city codes. The city code is often reported with a leading zero (0). Do NOT enter the zero.

"011" must be dialed when making international calls from the United States unless dialing to any country included in the North American Numbering Plan.

## 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. Any phone numbers from NANP countries can be entered in the domestic phone number field in the Banner system.

For additional information on NANP, refer to their Web site at <http://www.nanpa.com/>.

Country	Area Code
Anguilla	264
Antigua	268
Bahamas	242
Barbados	246

Country	Area Code
Barbuda	268
Bermuda	441
British Virgin Islands	284
Canada	Multiple
Cayman Islands	345
Dominica	767
Dominican Republic	809
Grenada	473
Guam	671
Jamaica	876
Montserrat	664
Northern Marianas Islands (Saipan, Rota, and Tinian)	671
Puerto Rico	787
St. Kitts/Nevis	869
St. Lucia	758
St. Vincent and Grenadines	784
Trinidad and Tobago	868
Turks and Caicos Islands	649
U.S. Virgin Islands	340

### **Email Address Type**

The email address type “SHSU” is required for Sam Houston State University reporting. Other email types are available for specific module processing.

### **Bank Routing Number**

Bank Routing Numbers can be downloaded from the Federal Reserve Web site.  
(<http://www.frb services.org/operations/epayments/epayments.html>)

### **Deceased Indicator**

The deceased indicator flag will be maintained by the Admissions office for recruits, applicants, and prospects. The Registrar’s Office will maintain this flag for current students. Human Resources will maintain this flag for faculty and staff.

Prompt attention is important so future mailings from the University offices are discontinued. Deceased status must be verified information, not just perceived information. Remember that all processing stops.

All population selections for communication purposes must search for, and exclude, deceased persons. Set end-date or death date (if known) or leave blank.

An annual review of, and end dating of, addresses for deceased persons will be conducted.

When notification that a person has passed away has been received, check the General Person screen GUASYST to see which Banner applications track this person.

By email, notify the data owner as appropriate in Human Resources, Registrar or Advancement. Include:

**Name of Person, Banner ID, Date of death (if known) and Source of information**

Check “deceased” indicator if the employee/student is deceased. Update the date of death, if known. If a date of death is entered, the deceased flag is set. Deceased information should be maintained using the same guidelines as name changes. Refer to the Data Change Rules section of this document.

**Confidential Information Indicator**

The Registrar’s Office will maintain this for students; and the Payroll Office will maintain this for faculty and staff.

**Name Types**

Name types can be affiliated with name changes affiliated with GTVNTYP.

## Appendix 1 – Address Type

There is only one active address per address type in enterprise operational system HR and Student. However, in Finance, vendors may have multiple active addresses within an address type using form FMTVEND.

The table below shows required values.

Code	Description	Explanation
B2	Second billing address	Used either for third party for student billing or second billing address for a vendor.
BI	Student Billing	Primary Billing Address, if different from the PR or MA Address. System Required
BU	Corporate Business Address	Used by Finance, System Required
CA	Campus Address	Used for mailing faculty, staff or student dorm address.
EM	Emergency Address	Used to enter an address for an emergency contact
GB	Grant Billing	Used by Finance for a Grant Billing Address
MA	Mailing	Required for data import processing. System Required
P2	Parent/Next of Kin2	Parent/Next of Kin 2
PA	Parents/Next of Kin	Required value for clients to use on SOAFOLK when entering parent address. System Required.
PO	Address to mail purchase orders and change orders	Used by Finance
PR	Permanent Residence	Generally utilized for international students, or in situations where a student has a permanent residence that is not the same as their mailing address.
TF	Temporary Forwarding	Used to enter a seasonal or other temporary forwarding address
XX	TGRFEED	Required by TGRFEED this is an accounts receivable process. System Required.

## Appendix 2 – Street Abbreviations

Address	Abbreviation
Alley	Aly
Annex	Anx
Apartment	Apt
Arcade	Arc
Avenue	Ave
Basement	Bsmt
Bayou	Byu
Beach	Bch
Bend	Bnd
Bluff	Blf
Bluffs	Blfs
Bottom	Btm
Boulevard	Blvd
Branch	Br
Bridge	Brg
Brook	Brk
Brooks	Brks
Building	Bldg
Burg	Bg
Burges	Bgs
Bypass	Byp
Camp	Cp
Canyon	Cyn
Cape	Cpe
Causeway	Cswy
Center	Ctr
Centers	Ctrs
Circle	Cir
Circles	Cirs
Cliff	Clf
Club	Clb
Common	Cmn
Commons	Cmns
Corner	Cor
Corners	Cors
Course	Crse
Court	Ct
Courts	Cts
Cove	Cv
Coves	Cvs
Creek	Crk
Crescent	Cres
Crest	Crst

Address	Abbreviation
Crossing	Xing
Crossroad	Xrd
Crossroads	Xrds
Curve	Curv
Dale	Dl
Dam	Dm
Department	Dept
Divide	Dv
Drive	Dr
Drives	Drs
Estate	Est
Estates	Ests
Expressway	Expy
Extension	Ext
Extensions	Exts
Falls	Fls
Ferry	Fry
Field	Fld
Fields	Flds
Flat	Flt
Flats	Flts
Floor	Flr
Ford	Frd
Fords	Frds
Forest	Frst
Forge	Frg
Forges	Frgs
Fork	Frk
Forks	Frks
Fort	Ft
Freeway	Fwy
Front	Frnt
Garden	Gdn
Gardens	Gdns
Gateway	Gtwy
Glen	Gln
Glens	Glns
Green	Grn
Greens	Grns
Grove	Grv
Groves	Grvs
Hangar	Hngr
Harbor	Hbr

Address	Abbreviation
Harbors	Hbrs
Haven	Hvn
Heights	Hts
Highway	Hwy
Hill	Hl
Hills	Hls
Hollow	Holw
Inlet	Inlt
Island	Is
Islands	Iss
Junction	Jct
Junctions	Jcts
Keys	Kys
Knoll	Knl
Lake	Lk
Lakes	Lks
Landing	Lndg
Lane	Ln
Light	Lgt
Lobby	Lbby
Lock	Lck
Locks	Lcks
Lodge	Ldg
Lower	Lowr
Manor	Mnr
Manors	Mnrs
Meadow	Mdw
Mill	Ml
Mills	Mls
Mission	Msn
Motorway	Mtwy
Mount	Mt
Mountain	Mtn
Mountains	Mtns
Neck	Nck
Number	No
Office	Ofc
Orchard	Orch
Overpass	Opas
Parks	Park
Parkway	Pkwy
Parkways	Pkwy
Passage	Psge

Address	Abbreviation
Penthouse	Pths
Pine	Pne
Pines	Pnes
Place	Pl
Plain	Pln
Plains	Plns
Plazza	Plz
Point	Pt
Points	Pts
Port	Prt
Ports	Prts
Prairie	Pr
Radial	Radl
Ranch	Rnch
Rapid	Rpd
Rapids	Rpds
Rest	Rst
Ridge	Rdg
Ridges	Rdgs
River	Riv
Road	Rd
Roads	Rds
Room	Rm
Route	Rte
Shoal	Shl
Shoals	Shls
Shore	Shr
Shores	Shrs
Skyway	Skwy
Space	Spc
Spring	Spg
Springs	Spgs
Square	Sq
Squares	Sqs
Station	Sta
Stravenue	Stra
Stream	Strm
Street	St
Streets	Sts
Suite	Ste
Summit	Smt
Terrace	Ter
Throughway	Trwy
Trace	Trce
Track	Trak

Address	Abbreviation
Trafficway	Trfy
Trail	Trl
Trailer	Trlr
Tunnel	Tunl
Turnpike	Tpke
Underpass	Upas
Union	Un
Unions	Uns
Upper	Uppr
Valley	Vly
Valleys	Vlys
Viaduct	Via
View	Vw
Views	Vws
Village	Vlg
Villages	Vlgs
Ville	Vl
Vista	Vis
Well	Wl
Wells	Wls

## Appendix 3 – Secondary Unit Designators

Description	Abbreviation
Apartment	Apt
Basement	Bsmt
Building	Bldg
Department	Dept
Floor	Fl
Front	Frnt
Hangar	Hngr
Key	Key
Lobby	Lbby
Lot	Lot
Lower	Lowr
Number	No
Office	Ofc
Pier	Pier
Rear	Rear
Room	Rm
Side	Side
Slip	Slip
Space	Spc
Stop	Stop
Suite	Ste
Trailer	Trlr
Unit	Unit
Upper	Uppr

## Appendix 4 – States, Canadian Provinces & Overseas Military

Description	Abbreviation	Description	Abbreviation
Alberta	AB	New Hampshire	NH
Australian Capital Territory	AC	Norfolk Island	NI
Alabama	AL	New Jersey	NJ
Alaska	AK	New Mexico	NM
American Samoa	AS	New York	NY
Arkansas	AR	North Carolina	NC
Arizona	AZ	North Dakota	ND
British Columbia	BC	Northwest Territories	NT
California	CA	Nova Scotia	NS
Northern Mariana Islands	CM	Ohio	OH
Canal Zone	CZ	Oklahoma	OK
Colorado	CO	Ontario	ON
Connecticut	CT	Oregon	OR
Delaware	DE	Palau Islands	PW
District of Columbia	DC	Pennsylvania	PA
Florida	FL	Prince Edward Island	PE
Federated Micronesia	FM	Puerto Rico	PR
Georgia	GA	Quebec	QE
Guam	GU	Queensland	QL
Hawaii	HI	Rhode Island	RI
Idaho	ID	Saskatchewan	SK
Illinois	IL	South Australia	SA
Indiana	IN	South Dakota	SD
Iowa	IA	Tasmania	TA
Kansas	KS	Tennessee	TN
Kentucky	KY	Texas	TX
Louisiana	LA	Trust Territories	TT
Labrador	LB	Utah	UT
Maine	ME	Vermont	VT
Manitoba	MB	Victoria	VIC
Mariana Islands	MP	Virginia	VA
Marshall Islands	MH	Virgin Islands	VI
Michigan	MI	Washington	WA
Minnesota	MN	West Virginia	WV
Mississippi	MS	Wisconsin	WI
Missouri	MO	Western Australia	WU
Montana	MT	Wyoming	WY
New Brunswick	NB	Yukon Territory	YK
Nebraska	NE	Military APO/AFO—Americas	AA
Newfoundland	NF	Military APO/AFO—Europe, Middle East, Canada, Africa	AE
New South Wales	NW	Military APO/AFO—Pacific	AP
Nevada	NV		



## Appendix 5 – Compass Directions

Compass directions used to identify the geographic area of a city are always abbreviated.

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

## Appendix 6 – Telephone Types

Except for those types marked with an asterisk, these telephone types are associated with the corresponding address types in Appendix 1.

Code	Description	Address Type
B2	Billing 2	B2
BI	Billing	BI
BU	Business	BU
CA	Campus	CA
CELO	Office Cellular Phone	*
CELL	Personal Cellular Phone	*
EM	Emergency	EM
FAX	Fax Number	*
GB	Grant Billing	GB
MA	Mailing	MA
P2	Parents/Next of Kin 2	P2
PA	Parent – Primary	PA
PAGR	Pager	*
PO	Purchase Order	PO
PR	Permanent	PR
SMS	Text Messages	*
TF	Temporary Forwarding	TF
XX	TGRFEED	XX

## Appendix 7 – Prefix Abbreviations

Title	Abbreviation
Adjutant	Adj
Adjutant General	Adg
Admiral	Adm
Ambassador	Amb
Attorney General	Atg
Brother	Bro
Bishop	Bishop
Captain	Capt
Chancellor	Chn
Chaplain	Chp
Chief Warrant Officer	CWO
Commander	Cmdr
Commandant	Cmdt
Colonel	Col
Corporal	Cpl
Count	Ct
Countess	Cts
Dean	Dean
Doctor	Dr
Ensign	Ens
Estate of	Est
Father	Fr
First Lieutenant	1 <sup>st</sup> Lt
General	Gen
Governor	Gov
Honorable	Hon
Judge	Jud
Lieutenant	Lt
Lieutenant Colonel	Lt Col
Lieutenant Commander	Lt Cmdr
Lieutenant General	Lt Gen

Title	Abbreviation
Lieutenant Governor	Lt Gov
Lieutenant (Junior Grade)	Lt JG
Madam	Mdm
Mademoiselle	Mlle
Major	Maj
Miss	Miss
Monsignor	Msg
Mister	Mr
Married	Mrs
Ms	Ms
Major	Maj
Major General	Maj Gen
Master Sergeant	M Sgt
Monsieur	Msr
President	Prs
Professor	Prof
Rear Admiral	Radm
Reverend/Priest	Rev
Second Lieutenant	2 <sup>nd</sup> Lt
Sergeant	Sgt
Senator	Sen
Señor	Sr
Señora	Sra
Senior Master Sergeant	SM Sgt
The Right Reverent	Rtr
Vice Consul	Vc
Vice Admiral	VAdm
Vice President	VP

## Appendix 8 – Suffix Abbreviations

Description	Abbreviation
Certified Public Accountant	CPA
Doctor of Chiropractic	DC
Doctor of Dental Medicine	DMD
Doctor of Education	EdD
Doctor of Medicine	MD
Doctor of Osteopathy	DO
Doctor of Veterinary Medicine	DVM
Incorporated	Inc
Juris Doctor	JD
Past Commander, Police Constable, Post Commander	PC
Registered Nurse Clinician	RNC
Senior	Sr
The Third	III
United States Air Force	USAF
United States Army	USA
United States Coast Guard	USCG
United States Marine Corps Reserve	USMCR
United States Navy Reserve	USNR

Description	Abbreviation
Chartered Life Underwriter	CLU
Doctor of Divinity	DD
Doctor of Dental Surgery	DDS
Doctor of Laws	LLD
Doctor of Optometry	OD
Doctor of Philosophy	PhD
Esquire	Esq
Junior	Jr
Limited	Ltd
Registered Nurse	RN
Retired	Ret
The Second	II
The Fourth	IV
United States Air Force Reserve	USAFR
United States Army Reserve	USAR
United States Marine Corps	USMC
United States Navy	USN

## Appendix 9 – Race and Ethnicity Codes

Race and Ethnicity codes are used for state, federal, and Sam Houston State University reporting. Race and Ethnicity must be entered for all employees and students to meet regulatory requirements.

### RACE (GORRACE)

Multiple values can be entered. These codes will be created based on reporting requirements for the Student and Human Resources systems.

### NEW ETHNICITY

Delivered Values are:

Not Hispanic or Latino

Hispanic or Latino

None

### ETHNICITY – STVETHN

Only one ethnicity can be entered per person, therefore use of Race and New Ethnicity should be utilized whenever possible. Examples are below:

<b>Code</b>	<b>Description</b>
Q	Black or African American
R	Hispanic
S	White
T	American Indian or Alaska Native
U	Asian
V	Native Hawaiian or Pacific Islander

These codes represent the values that are received via EDI. They will be translated to the appropriate codes for IPEDS and State Coordinating Board reporting.

## Appendix 10 – Email Address Type

The SHSU email address will be used for official communication with current students, faculty, and staff.

<b>Code</b>	<b>Description</b>
SHSU	Campus assigned email address. Required for Sam Houston State University.
PERS	Personal Email (recruits, applicants, others for non institution email address)
SMS	Personal Address for text messaging. Will be used during the Account Creation process.
BUS	Vendor/Business Emails may be required for Finance
URL	URL Address for Web sites, generally for businesses

## Appendix 11- Address Change Source Type

<b>Code</b>	<b>Description</b>	<b>Explanation</b>
CONV	Conversion	From Legacy
EDI	Electronic Data Interchange	Information provided through electronic transfer of data
POST	Post Office Change	Returns from US Postal Service
SELF	Individual Self Reported	Notification from the person
WEB	Self Reported – WEB	Address corrected through the WEB by student

## Appendix 12 – County Codes

A complete list of FIPS-6 county codes is available at <http://www.itl.nist.gov/fipspubs/co-codes/states.htm>

This table will be updated with all US County Codes. The State code has been added to the description to enhance searching. This information will be stored in a separate workbook as it will be too lengthy to include in this document.

### Examples:

Code	ST-County Name
51005	VA - Roanoke
36001	NY - Albany
13009	GA - Baldwin
48009	TX - Archer

Code	ST-County Name
48339	TX - Montgomery
06001	CA - Alameda
12061	FL - Clay



## Appendix 13 – Marital Status

<b>Code</b>	<b>Description</b>
D	Divorced
M	Married
N	Domestic Partner
P	Separated
S	Single
W	Widowed
O	Other
U	Unknown/Not Reported