

Data Standards and Procedures Manual

Last Major Revision –May 2020

Last Update –February 2022



THE UNIVERSITY OF
SCRANTON[®]
A JESUIT UNIVERSITY

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Getting Started

Purpose

These standards and procedures are defined to ensure the accuracy and integrity of data that is electronically created and maintained in the University's system of record, [Banner](#) by [Ellucian](#). Departments may have additional guidelines that supplement but do not replace or supersede the standards and procedures defined in this manual.

Banner ERP

Additional information on what Banner ERP is and how to gain access to it is available on the Banner Page in the [my.scranton](#) portal.

Information Management and Security Policies

Policies governing [information management and security](#) at the University should be reviewed and followed by anyone responsible for or having access to University data. Reference the roles of Data Steward, Data User and Data Custodian defined in the Information Security Policy for details of responsibilities with respect to maintaining the security of the data.

Constituents and Governing Offices

Students

Creation and maintenance of Student records are the responsibility of the Admission's, Registrar's and Colleges unless the student's primary role is an employee (non-work study). If the student's primary role is employee, the responsibility lies with the Human Resource Office.

Under the Family Educational Rights and Privacy Act of 1974 (FERPA), release of personally identifiable student education records (other than [public information identified here](#)) to any party other than those specified by FERPA is not permitted without the student's written consent.

Note: For more information on FERPA, read the University guidelines: [Student Rights and Confidentiality of Information](#).

Please reference the [Student Data Release Policy](#) for details on student information that can be provided internally and externally.

Employees (Faculty & Staff)

Creation and maintenance of Employee records are the responsibility of the Human Resource Office.

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.

Confidentiality

Students, faculty and staff can request that a confidentiality indicator be set on their record within the ERP database. Setting this indicator restricts “Directory Information” from being made 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, only a small subset of employees in Advancement, Human Resources, Admissions/Student (Academic) are authorized to create new person records.

Using Common Matching to enter a new record

Creating a person record is initiated on SPAIDEN, PPAIDEN, FOAIDEN, or APAIDEN depending on the constituent being entered. Although, the process can be initiated from GOAMTCH (Common Matching Page), the initial page of entry should be the %IDEN page used within your area. Common Matching is a process that facilitates the creation of General Person Information by checking for existing identification records before a new one is created. Reference [Appendix B for Common Matching Rules](#) that have been established to determine if a record “matches” an existing record.

1. Access the page (%IDEN) on which you want to enter the person data. To minimize the creation of a duplicate record (reference [Appendix C: Duplicate Pidm Processing](#)), a search from the ID field must be invoked to check for possible matches; choose Person Search and enter the

person's first name and last name using the % symbol around the names to check for any possible matches.

Example: For Marge Smith, search by "%smith%" for the last name and "%ma%g%" for the first name. Performing a search as indicated will return records for possible matches such as Marge Jones-Smith, Margaret Smith, Maggie Smith, Margery Ann Smith, etc.

Searching in the above way will find matches that may otherwise be overlooked when performing a "Duplicate Check" from 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.
 - Select the "Select ID" icon to bring the information on the matched record back to the %IDEN page that you started from.
 - Select the "Details" icon to view GUASYST information and see what areas the record belongs to.

- Select the “Update ID” icon if you entered information in GOAMTCH that should be added to the records in the databases. GOAMTCH will attempt to insert or update records in the SPRADDR (address), SPRTELE (telephone), SPBPERS (biographical), and GOREMAL (e-mail) tables. See Note below concerning updates from GOAMTCH.
- Select the “View Comments” icon to see if there are any comments.
- Select the “Create New” icon if the matched record is not a match to the record being entered.

C. **Potential Matches** - More than one record matches the data you entered, or there are multiple records where some of the information is matched, but not all of it. For example, it could be that the first name, last name, and address you entered exist in the database but the date of birth is different, or that two records with the same first name, last name, address and date of birth are found. The choices are listed on the Potential Matches tab on GOAMTCH.

- Select the “Select ID” icon to bring the information on the matched record back to the %IDEN page that you started from.
- Select the “Details” icon to view GUASYST information and see what areas the record belongs to.
- Select the “Update ID” icon if you entered information in GOAMTCH that should be added to the records in the databases. GOAMTCH will attempt to insert or update records in the SPRADDR (address), SPRTELE (telephone), SPBPERS (biographical), and GOREMAL (e-mail) tables. See Note below concerning updates from GOAMTCH.
- Select the “View Comments” icon to see if there are any comments.
- Select the “Create New” icon if the matched record is not a match to the record being entered.

Updating fields on GOAMTCH

If the record already exists, it can be updated with information from the new record in the following circumstances:

SSN/SIN/TIN if it is null in the database

Birth date if it is null in the database

Gender if it is unknown in the database

Address, telephone, and e-mail will update unless an exact match is found in the database.

Complete the rest of the %IDEN page

Enter as much data as possible in each tab of the %IDEN page using the guidelines below and referencing the [Banner ERP General Person Glossary](#)

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. For detailed information, please reference the “Preferred Name Process” which can be found by accessing the “Common Data Procedures” link within the Banner ERP Resources section on the Banner Page of My.Scranton. 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

To aid in the reduction of duplicates in the system, use the “Alternate Identification” tab of 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 “To Date” should be entered for the address ending and the “Inactivate Address” box checked. A new address can then be entered by inserting a new record. Unless making a correction due to an initial entry error, do not change or delete the prior address. If an address is entered with a future end date it is the responsibility of the user to make a note of the end date and go back into the record to “In-Activate” the address when the appropriate time has come.

Add ‘From Date’ to a new address.

Verify an address at <https://www.usps.com/>

Discrepancies between this site and data to be entered should be forwarded to the Technology Support Center so that the issue can be investigated.

Phone Number

The phone number associated with this address should also be entered, if known.

County

Null or Unknown (UNK) County Codes for active addresses of type DO, DR, LO, MA, WA are updated by a nightly process.

Nation

Do NOT enter a nation 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.

Military Addresses

Reference <https://faq.usps.com/s/article/How-Do-I-Address-Military-Mail> for details on entering Military addresses.

International Addresses

Address information should be placed in the street fields and city entered in the City field. For Canadian Addresses, the Province is to be entered as a state in the State field. The zip code field can be entered if it is supplied; otherwise the field is to be left blank. **Nation code must be entered.** Street designation abbreviations should not be used if the clarity of the address is sacrificed.

Reference <https://faq.usps.com/s/article/International-addressing-requirements>.

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 inactive by checking the “Inactivate” checkbox. A new telephone can then be entered by inserting 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 when they will not match. For example, if a working address is not maintained for a constituent, but a work phone number needs to be tracked, the address type code of “MA” and telephone type code of “WORK” could be used.

Email

A SCRA email should be identified as preferred for current students and faculty members; an automated process runs daily to set the SCRA email preferred indicator. Reference [Appendix F: Automated Processes](#).

An entity (person or non-person) can have multiple email addresses. Although there can be multiple emails, only one can be checked as “Preferred”. Students are provisioned with an SCRA email address upon matriculation. The SCRA email record shall hold the “Preferred” indicator throughout the student’s period of enrollment. The Office of the Registrar & Academic Services shall be considered the data steward and custodian of the “Preferred” indicator on an active student’s SCRA email record. Reference [Appendix G: Email Preferred Indicator automatic process](#) for additional information.

If an email is known to be inactive, it should be marked as inactive by checking the “Inactivate” checkbox.

Biographical

For students and employees, changes to sensitive data such as name, date of birth, SSN, marital status, citizenship, and deceased indicator/date must have acceptable documentation. Acceptable documentation is a copy of the social security card, birth or death certificate, passport, or driver’s license. Professional judgment should be used when making corrections to these fields. Students must complete a [Change of Bio-Demographic Information Form](#) and submit it to the Office of the Registrar.

Confidential Indicator

If the confidential indicator is checked, the following message will be displayed for the record when the record is displayed within the Banner ERP system.

“WARNING: Information about this person is confidential”

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 just perceived information. For the process with respect to students, reference [Responsibilities in the Event of a Student Death](#). Students that are pre-enrolled are the responsibility of the Admissions Office. For employees, the Human Resource Office is responsible for verification and process. The Advancement Office is responsible for all other constituents. Once verified, the deceased indicator is checked and date of death entered, addresses, telephone and email addresses inactivated.

An automated process runs weekly, reference [Appendix F: Automated Processes](#) to identify any deceased person with active contact information. The system inactivates mailing addresses, email addresses and telephone numbers to ensure no contact is made towards deceased persons. There is no provision for mailings to other family members. (NOTE: Advancement does have procedures on handling parent records for deceased students.)

Emergency Contact

In accordance with the Missing Persons Procedure/Policy documented in the [Annual Security and Fire Safety Report](#), students can identify an emergency contact to be used specifically in the event of a “Missing Persons” incident. This is identified as a Missing Persons Contact and is accessible using SPAEMRG.

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.

Format:

- Enter in mixed cased; not all uppercase or lowercase. Enter as submitted by individual.
- **Hyphens** may be used.
- **Apostrophes** may be used.
- **Single character first names** should be entered with a period [.]. For example, if a person's full name is R. Frances McDonald, and the "R." is his official first name, the "R.", with a period after the "R" should be entered in the first name field. Double character first names should be entered with periods following each of the single characters followed by the middle name and last name in the appropriate fields. For example, if the person's full name is R. F. McDonald, and the person's official first name is "R.F.", then "R.F." should be entered in the first name field with no spaces.
- Comma [,], pound sign [#], asterisk [*] and percent [%] are **NOT** to be used.
- Do **NOT** include prefix in the first name field. There is a separate field for this. Examples include, Dr., Mr., Mrs., etc.

Required: Yes.**Middle Name**Definition: Person Middle Name or Middle Initial with a maximum length of 60 charactersFormat:

- Enter in mixed cased; not all uppercase or lowercase. Enter as submitted by individual.
- **Hyphens** and **Apostrophes** may be used.
- The **period** [.] is entered in the middle name field only when an initial is provided.
- Comma [,], pound sign [#], asterisk [*] and percent [%] are **NOT** to be used.

Required: No.**Prefix**Definition: Person Prefix with a maximum length of 20 characters. Enter a name prefix in this field, not in the first, middle or last name fields.Format: Reference <http://www.militaryfactory.com/ranks> for a list of Military Prefixes. [Reference Appendix H for a list of Non-Military Name Prefixes.](#)Required: No.**Suffix**Definition: Person Suffix with a maximum length of 20 characters. Enter a name suffix in this field, not in the first, middle or last name fields.Format: [Reference Appendix I for a list of Name Suffixes.](#)

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.
- “William” is the first name, but the individual prefers to be addressed as “Bill”.
- Specify name prefix with last name for clergy and religious.

Format: Follow [First Name](#) format.

Required: No, except for specific department requirements.

Full Legal Name

Definition: Full Legal Name of person with a maximum length of 500 characters. This field is NOT part of the Preferred Name Process.

Format: Refer to Office of the Registrar or HR procedures for format. HR requires a first and last name.

Required: NOT to be entered except by the Office of the Registrar for students and Human Resources for employees.

Non-Person Name

Definition: Not applicable to Person Records.

Alternate Identification

Alternate Identification consists of Name Type, Change Type, ID, Last, First and Middle Name, Origin, Create User and Create Date.

Name (Name Type, Last, First, Middle)

Definition: Alternate name of the Person

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

Required: No.

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: MM/DD/YYYY

Required: Yes.

To Date

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

Format: MM/DD/YYYY

Required: Only when inactivating address.

Address Type

Definition: Code to be associated with an address for specific correspondence and reporting, such as, Mailing, Current Student Address, Dorm.

Format: List of values provided within Banner Admin. [Reference Appendix D for definition of each current Address Type.](#)

Required: Yes.

Street Line 1, Street Line 2, Street Line 3

Definition: Street Line with a maximum length of 75 characters.

Format:

- Street Lines are to be entered using mixed case and without punctuation.

- 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 (e.g. enter Boulevard as “Boulevard”, enter Street as “Street”)
- Abbreviate the designation for ‘in care of’ to “C/O” and enter as Street Line 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:

- List of values provided within Banner Admin.
- If the full nine digit U.S. Postal Zip is known, enter it with a hyphen; otherwise enter the 5 digit U.S. Postal Zip. (Entering a 5-digit zip code will automatically populate the City, State and Zip code extension fields.)

Required: Yes, for domestic addresses. No, for Canadian and/or International addresses unless provided.

County

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

Format: List of values provided within Banner Admin.

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.

Format:

- Do **NOT** enter hyphens in the phone number field, except for international numbers.
- For International numbers, enter the phone number sequence as provided by person.

Required: Yes.

Extension

Definition: Phone Extension with a maximum length of 10 characters.

Format: Do **NOT** enter EXT or X in the extension field.

Required: No.

International Access

Definition: International Access with a maximum of 16 characters.

Format: As provided.

Required: No.

Indicator

Definition: Checkbox field of type of number provided: Primary or Unlisted

Format: Checkbox selection.

Required: No.

Comment

Definition: Comment with a maximum of 60 characters.

Format: Comment is to be entered using mixed case.

Required: No.

E-mail

Email consists of an Email Type, Email Address and indicator (preferred, inactivate, display on web) plus a comment area.

E-mail Type

Definition: Code to be associated with an email for specific usage.

Format: List of values provided within Banner Admin. [Reference Appendix K for definition of each current Email Type.](#)

Required: Yes.

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: Social Security Number of the person. Social Insurance Number (Canada). Tax Identification Number (non-person). Maximum number of characters is 9.

Format: For SSN, no dashes are to be entered.

Required: Yes, for all employees and students.

Confidential Indicator

Definition: Identifies the record as being confidential and therefore excluded from various reports and displays.

Format: Checkbox indicator

Required: No

Deceased Indicator, Date

Definition: Identifies the person as being deceased and the date of death.

Format: Checkbox indicator, MM/DD/YYYY

Required: No, only if verified.

Citizenship

Definition: Citizenship of the person.

Format: List of values available within Banner Admin.

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

Marital Status

Definition: Marital Status of the person.

Format: List of values available within Banner Admin.

Required: Yes, for all employees and for students applying for Financial Aid, including work study.

Religion

Definition: Religion of the person.

Format: List of values available within Banner Admin.

Required: Yes, for students to be considered for specific endowed financial aid.

Legacy

Definition: Relationship of the person to University Alumni.

Format: List of values available within Banner Admin.

Required: No.

Ethnicity

Definition: Legacy field to capture Ethnic background of the person. This is being retained for historical purposes.

Format: List of values available within Banner Admin.

Required: No longer being entered for new constituents.

New Ethnicity

Definition: New Ethnicity of the person.

Format: Pull-down list available within Banner Admin.

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

Ethnicity and Race Confirmed/Date

Definition: Indicate if ethnicity and race have been confirmed and the date it was confirmed.

Format: Checkbox indicator, MM/DD/YYYY

Required: No.

Veteran File Number

Not being used.

Veteran Classification

Definition: Veteran classification of the person.

Format: Pull-down list available within Banner Admin.

Required: No.

Date of Discharge

Not being used.

Armed Forces Service Medal Indicator

Not being used.

Disabled Veteran

Not being used.

Race

Definition: Race Code of the person.

Format: Pull-down list available within Banner Admin.

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

Emergency Contact

Emergency contact information consists of relationship, name, address and telephone information for the person to contact in case of emergency.

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](#) section.

Required: No.

Address (Street Line 1, 2, 3, City, State, Zip, Nation)

Definition: Address of the Emergency Contact.

Format: Reference [Address Fields](#) defined in the [Address](#) section.

Required: No.

Telephone (Area Code, Phone Number, Extension)

Definition: Telephone of the Emergency Contact.

Format: Reference [Telephone Fields](#) defined in the [Telephone](#) section.

Required: Yes, if Emergency Contact is entered.

Additional Identification

Additional identification information is used to record an identification code for an external system.

ID Type

Definition: Identifies external system.

Format: List of values provided within Banner Admin.

Required: No.

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.

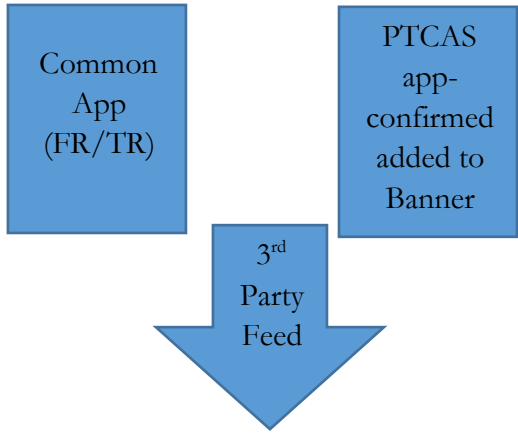
Appendix A: General Person Process Flow

General Person/Biographical Data Process

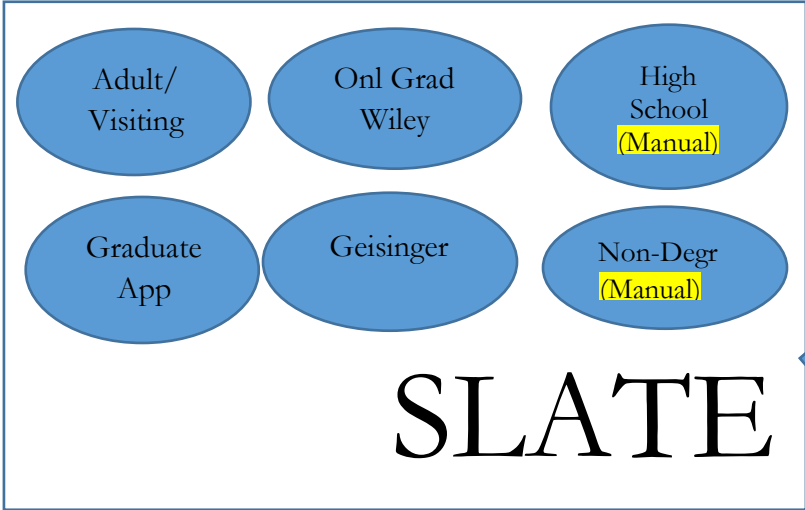
Timeline	Office	Population	General Person Field exceptions
STUDENT Applicant Process: Start of Applicant Process up to Orientation or 1 st Day of Class (if no orientation)	Admission's Office	Prospective students in the admission lifecycle except prospective students that are employees	Confidentiality Indicator is not collected by the Admission Process and does not apply to this group.
STUDENT Between Orientation and 1st Day of Class	Deans/Advising Centers	Prospective Students that have confirmed and have attended orientation	
STUDENT Matriculation through Graduation	Registrar's Office	Confirmed students (Grad/Undergrad) that have started class through graduation	Marital Status, Religion not currently maintained unless requested by student.
STUDENT Post-Graduation	Advancement Office	Post Graduates except those returning as student or employees	Citizenship, Ethnicity, Race, Religion, Confidentiality Indicator are not maintained. Although Confidentiality Indicator needs to be considered, FERPA covers postgraduate. *TX address type only used for specific purpose **Date of Birth is updated if learned or nulled if definitely incorrect (1/1/1901,etc.) ***SSN is updated only for duplicate pidm process
Employees	Human Resources/Provost/Dean's	Employees who are students, Z classes; Excludes WS Students	Human Resources review the Z Eclass populations on a cycle.

Student Applicant Process

Data Steward: Admission's Office



Notes:
PTCAS – Physical Therapy CAS
3rd Party Feed for PTCAS is not a feed but is picked up by Admissions Office and only is confirmed students.



Confirmation by Student

Deposits are processed through Cybersource and automatically generated.

Bursar Office Deposit Confirmation

SARETMT daily process to match and load applicants

***Load Review & Verification**
Application Upload Process automatically updates general person information for employees and/or alums if a match. Employees and/or alumni “suspense” records are reviewed on a case-by-case basis.

Confirmations and other manual updates

Admission's Office

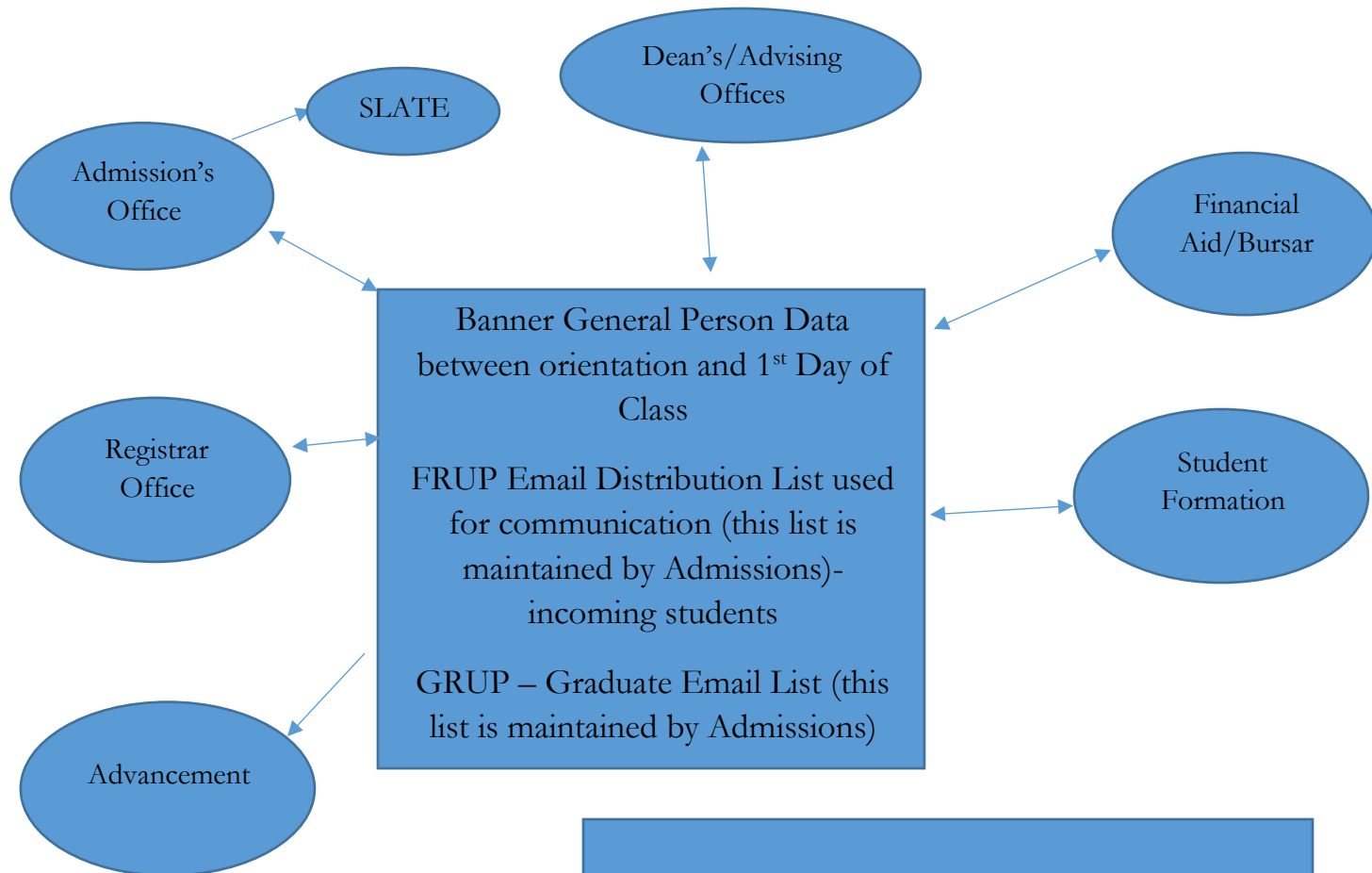
Banner

Applicant (SAAEAPS)
Confirmed (automatically creates SGASTDN)

Notes: GA Application Process can happen anytime. All processes for GA are within Slate, Once Hired, there is an in-house application that is used. Confirmation is in SLATE

Between Orientation and 1st Day of Class Process

Data Steward: Dean's/Advising Offices



NOTES: Who is responsible for the data?
Admissions owns until the first day of class and then the Registrar's Office takes over.

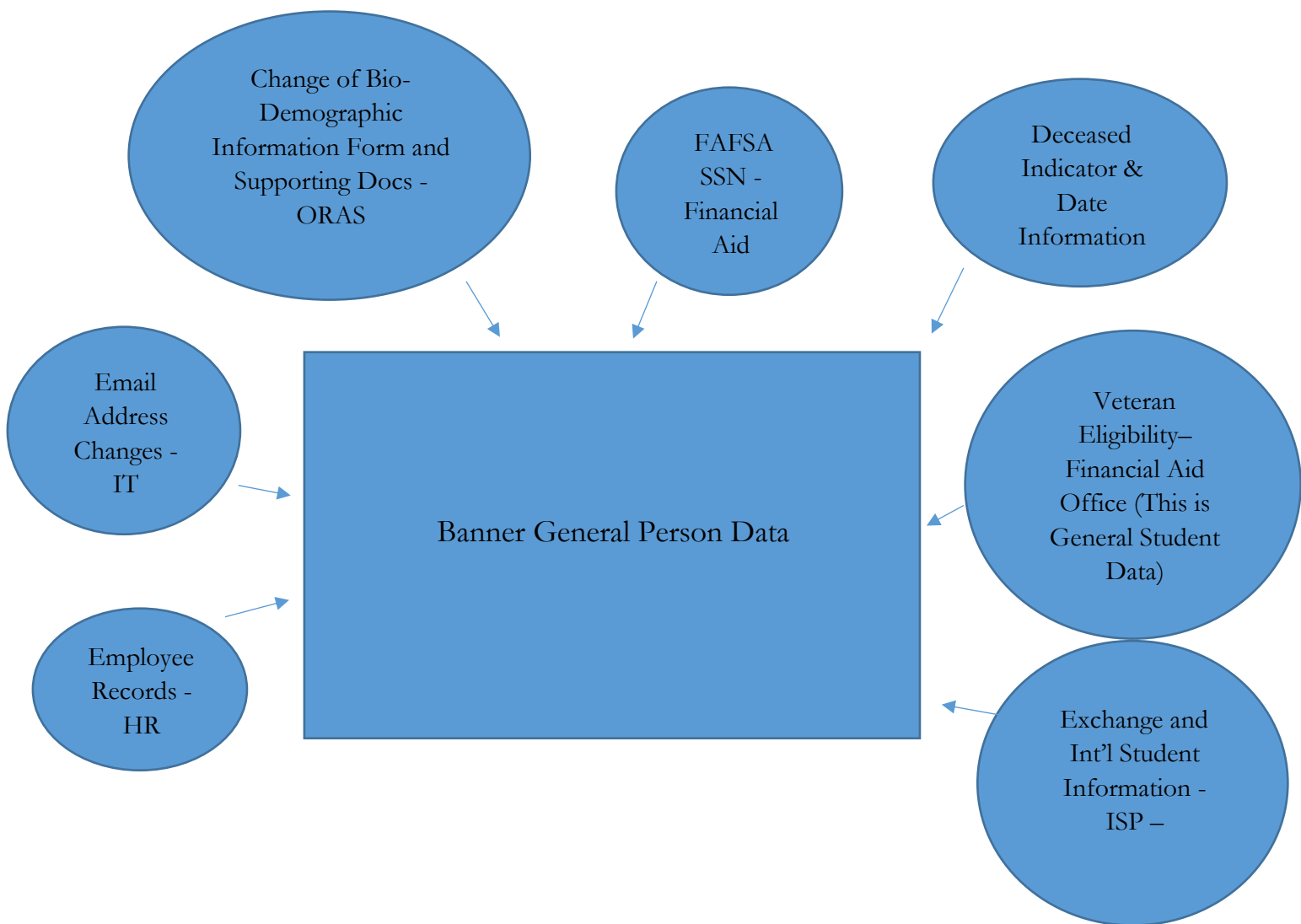
Admissions makes changes before the 1st day of class to Enrollment Status.

Financial Aid – Does not update general information, but through the Dept of Educ (DOE) – updates blank SSN from FAFSA.

Matriculation through Graduation Process

Data Steward: Office of the Registrar

- Financial Aid automated process updates BLANK SSN from FAFSA
- <https://www.scranton.edu/academics/registrar/undergraduate/Bio-demoinfo.shtml> references a form to be completed and documentation that the Office of the Registrar requires for change in bio-demographic information.



Post-Graduation Process

Data Steward: Advancement Office

Incoming Information:

- Development Officers
- Direct communication
- Returned Mail & Mail Reports
- Obituaries
- Other Divisions
- Events
- Slate (Parents)
- Gifts
- Business Cards

Research:

- LexisNexis
- LinkedIn and other social media
- Donor Search
- Company pages
- Internet Searches

Bursar: modifying MA Addresses for Students no longer enrolled (graduated/withdrawn) that still have A/R balance.

Banner:

- Last Name
- First Name
- Middle Name
- Prefix/Suffix
- Preferred Name
- Marital Status
- Address (MA ,WA, SE, & TX*)
- Telephone (MA,WA, CELL)
- Email
- Gender
- Legacy
- Date of Birth **
- Deceased
- SSN ***

* TX address type only used for specific purpose

** Added if learned or nulled if definitely incorrect (1/1/1901, etc.)

*** Only updated for duplicate record deletion process

Advancement reviews exception report for changes to students (all levels) or employees. Changes are backed out and appropriate office notified.

Exception Report

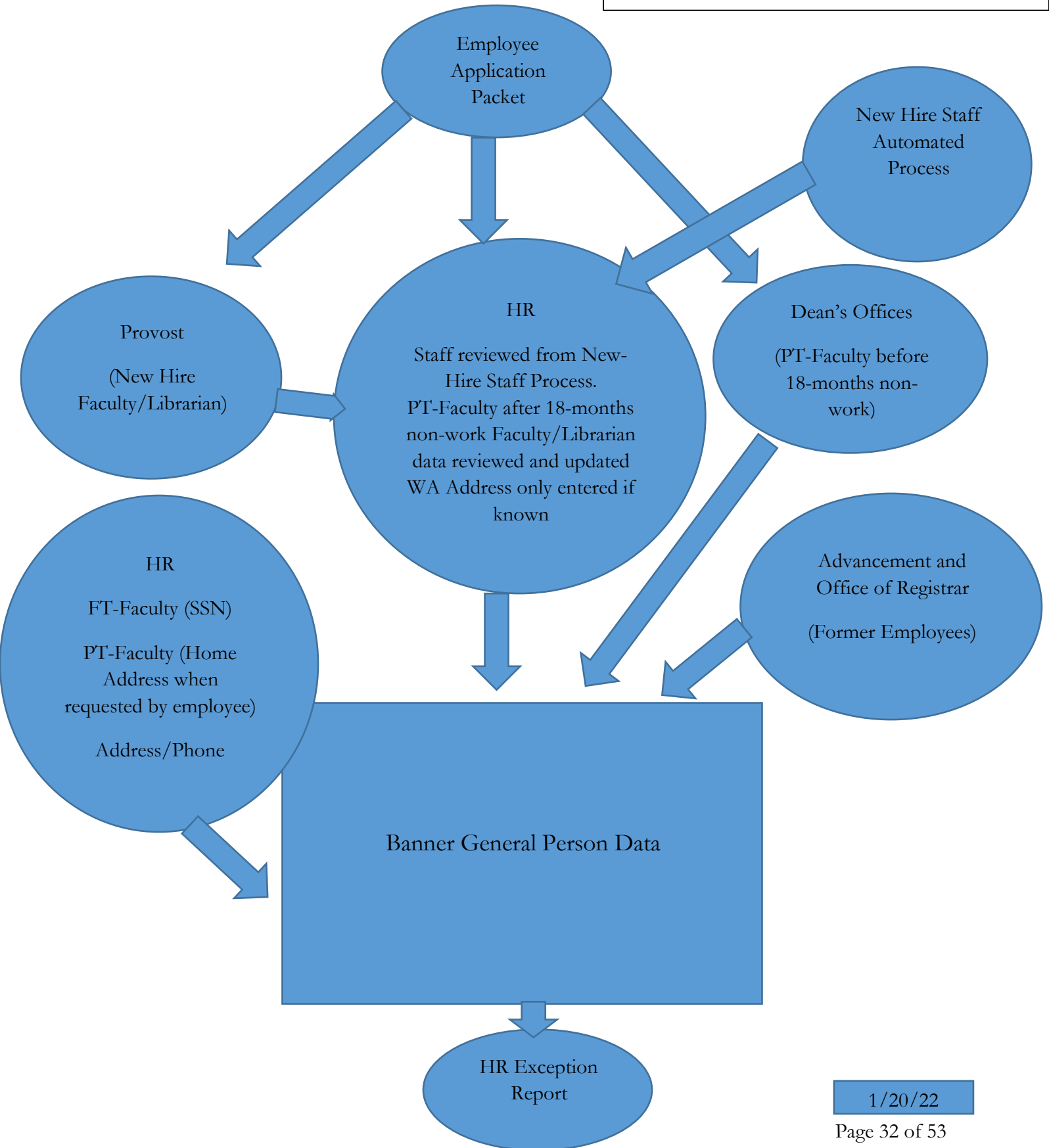
Admissions/
Office of the Registrar

Human Resources

1/21/22

Employee Process

Data Steward: Human Resources Office



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 an ID change. The problem occurs when both fields are blank. This indicates a potential duplicate person.

When a duplicate is identified, the record should be “marked” as a duplicate by making the following changes:

- 1) Enter the same SSN in the SSN field for each record, so that the two records have the same SSN value. If the SSN is not known, enter the RoyalID in the SSN field for each record.
- 2) Enter “Duplicate – Do Not Use” in the street line 1 of the MA address of the “INCORRECT” record to give a visual indication that the record is a duplicate and that no more information should be entered on this “incorrect” record.
- 3) Enter a request with the Tech Support Center to have the duplicate resolved.

A process to merge the two records will be followed by the IT division.

Appendix D: Address Types

BI: Billing

If different from the mailing address (MA), the address where the student's bill is sent (Bursar).

DO: Dorm

Campus mailbox address (DeNaples Center #, The University of Scranton, P.O. Box 3958, Scranton PA 18505-0958), used for batch processing dorm assignments.

DR: Dorm Room

Campus building and room.

EM: Emergency

To be used by Human Resources for the New Hire Workflow process and used by Self-Service to populate the table SPREMARG.

LO: Current Student Address

If different from the mailing address (MA), the address where the student physically resides while attending classes.

MA: Mailing

Mailing address used for check printing (Accounts Payable), 1099 forms, W2 forms (Payroll), student 1098T (Bursar) and Advancement mailings. For most traditional undergraduate students, this would be the home (parent) address. Each enrolled student must have a mailing address.

OP: Other Property

Used by Advancement to note an additional/other property that a constituent uses for research.

OR: Current Legal Address

If different from the mailing address (MA), the student's or employee's current legal address.

PO: Vendor

The vendor that we are paying (Purchasing).

RT: Remittance

If different from the vendor address (PO), the address where the check is sent (Accounts Payable).

SE: Seasonal

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

TX: Local Tax Only

Used for tax filing if the mailing address (MA) is a PO Box (Human Resources/Payroll). Additionally, used in the event of an employee death, the mail address (MA) is inactivated and a (TX) is created in its place (Human Resources/Payroll). Used for a donor with a giving total equal to or in excess of \$100,000 in a fiscal year and being deceased during that fiscal year (Advancement).

WA: Working Address

Address of employment (Advancement) or (Human Resources) University employee office address ([building code] Building Name, Room #, Scranton PA 18510).

XX: Reserved for TGRFEED Use Only

Used for AR in the Ellucian TGRFEED.pc program.

Date	Audit Trail of Changes
January 2017	Office of Institutional Research
March 2019	Added OP (Other Property) – Approved at ATAC Data Governance February 2019.

Appendix E: Clean Address Standards

Standards for **Clean Address** provided by **Runner Technologies** were established by the Data Standards Committee in December 2007:

The following address types are verified:

BI, EM, GU, IN, LO, MA, MW, NP, OP, OR, PO, RT, SE, TE, WA and FA [Reference: Appendix D Address Types.](#)

Date	Audit Trail of Changes
July 2021	Add Address Type OP (Other Property) CR #4702

Appendix F: Automated Processes

Deceased check.shl runs weekly to inactivate addresses (Except TX address type), email addresses, telephone numbers for anyone on the system coded as deceased.

Prefer_email_update.shl as detailed in [Appendix G: Emailed Preferred Indicator Automatic Flow](#)

Sched_spraddr_update.shl runs daily to update county code for MA, WA, LO and DR address types. [Reference Appendix D: Address Types](#). It also updates the Nation Code to Null for active addresses that have a Nation Code of 592.

Appendix G: Emailed Preferred Indicator Automatic Process

An automatic process runs daily as defined below:

The process sets the SCRA email address to preferred for

- Any student registered for a current or future term
- Any faculty member assigned to a section for a current or future term

If the person already has a different preferred email address, the preferred indicator is set to N and the comment field is set to OLDPREF.

The script then selects everyone with a SCRA email address that is active and preferred. The preferred indicator is set to N if

- The person is a student who has graduated and is not registered for a future term
- The person is a student who has not attended for at least 18 months
- The person is a faculty member who has not been assigned to a class for at least 18 months

Once the SCRA is updated, the first record matching the following queries is set to preferred. Activity date is used to determine the most recent record if multiple records are found with the same email type:

1. An active email record with the comment OLDPREF
2. An active email record with email type EML1
3. An active email record with email type EML2
4. An active email record with email type EMLB

No email address is set to preferred if there are no active email addresses matching any of the criteria.

Date	Audit Trail of Changes
August 2017	Process and Content created by Rose Ann Jubinski, Enterprise Application Services

Appendix H: Suggested Name Prefixes (non-military)

PREFIX	DESCRIPTION
Amb.	Ambassador
Archbishop	Archbishop, a bishop of higher rank
Archimandrite	Archimandrite, Eastern Orthodox & Eastern Catholic
Atty.	Attorney
Bishop	Bishop
Brother	Brotherhood, Catholic
Cardinal	Cardinal, Catholic
Deacon	Deacon
Dr.	Anyone with doctorate
Fr.	Father, clergyman
Gov.	Governor
Hon.	Judge
Judge	Judge
Miss	Female, unmarried
Most Rev.	Most Reverend, religious
Most Rev. Bishop	Most Reverend Bishop, religious
Most Reverend	Most Reverend, religious
Mr.	Male
Mrs.	Female, married or widowed
Ms.	Female, marital status unknown
Msgr.	Monsignor
Pastor	Pastor, religious
Prof.	Professor
Rabbi	Rabbi

Ranger	Ranger: law enforcement, Army
Rep.	Representative, politics
Rev.	Clergy: Protestant
Rev. Dr.	Clergy with Doctorate: Protestant
Rev. Fr.	Priest
Rev. Mr.	Reverend, religious
Rev. Msgr.	Reverend Monsignor, religious
Senator	Senator
Sheikh	Sheikh
Sir	Sir
Sister	Member of Sisterhood
Sra	Seniora
The Hon.	The Honorable, judge
The Rev.	The Reverend, religious
The Ven. Archpriest	The Venerable Archpriest, religious
The Very Rev.	The Very Reverend, religious
Very Msgr.	Very Monsignor, religious
Very Rev.	Very Reverend, religious
Very Rev. Msgr.	Very Reverend Monsignor, religious

Appendix I: Suggested Name Suffixes

SUFFIX	DESCRIPTION
CPA	Certified Public Accountant
CRNA	Certified Registered Nurse Anesthetists
CRNP	Certified Registered Nurse Practitioner
D.C.	Doctor of Chiropractic
D.D.	Doctor of Divinity
D.D.S.	Doctor of Dental Surgery
D.M.D.	Doctor of Dental Medicine
D.O.	Doctor of Osteopathy
D.P.M.	Doctor of Podiatric Medicine
D.P.T.	Doctor of Physical Therapy
D.V.M.	Doctor of Veterinary Medicine
Ed.D.	Doctor of Education
Esq.	Esquire
II	The Second
III	The Third
IV	The Fourth
I.H.M.	Sisters, Servants of the Immaculate Heart of Mary
J.D.	Juris Doctor
Jr.	Junior
M.A.	Master of Arts
M.D.	Doctor of Medicine
M.Ed.	Master of Education
M.S.	Master of Science
O.D.	Doctor of Optometry

O.S.F.	Order of Servant Franciscans
P.C.	Past Commander, Police Constable, Post Commander
P.E.	Protestant Episcopal
Ph.D.	Doctor of Philosophy
Ret.	Retired
R.N.	Registered Nurse
R.N.C.	Registered Nurse Children
R.S.M.	Religious Sisters of Mercy
S.H.C.J.	Society of Holy Child Jesus
S.J.	Society of Jesus
Sr.	Senior
USA	United States Army
USAF	United States Air Force
USAFR	United States Air Force Reserve
USAR	United States Army Reserve
USCG	United States Coast Guard
USMC	United States Marine Corps
USMCR	United States Marine Corps Reserve
USN	United States Navy
USNR	United States Navy Reserve

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

HFA: 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

Employee's private line when the WA 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.

Appendix K: E-Mail Types

EML1: E-mail Primary

EML2: E-mail Secondary

EMLB: Business E-mail

EMLP: Parent Email

EPAY: Accounts Payable for Intellectcheck

SCRA: E-Mail @scranton.edu

Strictly maintained for internal processing. Do NOT alter.

STAB: Study Abroad

URLB: Business URL

URLH: Home URL

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 undergraduate level. This also includes students enrolled in the fall term who attended college for the first time in the prior summer term, and students who entered with advanced standing (college credits earned before graduation from high school).

GD: Graduate Student

A student pursuing a graduate academic goal where a degree/certificate is awarded.

HI: High School Scholar

A current high school student pursuing undergraduate credits.

PM: Pre-matriculant

A student who has graduated high school but is not yet enrolled in a degree-seeking program at the university. Typically the student is in this status in the summer between high school graduation and a Fall start.

RE: Re-Admit

A student who is returning to complete their most recent degree/certificate at The University of Scranton.

SI: Self Improvement

A non-degree student who is enrolled for the purpose of personal enrichment or pre-professional academic preparation.

TR: Transfer

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

VI: Visiting

A non-degree/certificate seeking student who is attending The University of Scranton for the purpose of transferring credits to their home institution.

Student Types

A: ROTC Student

A visiting student who is participating in ROTC courses offered through the military science department.

C: Continuing Student

Banner applied code to New/Returning students in subsequent terms (as long as the student is at the same level/status).

M: Marywood Student

A student visiting from Marywood University through the University of Scranton/Marywood University Cross-Registration Consortium Agreement. Courses are taken at The University of Scranton and are also transcribed at Marywood University.

N: New Student

A student who is pursuing a specific academic goal for the first time. This includes students pursuing a degree or certificate.

P: Post-Baccalaureate Student

A student who is pursuing a second baccalaureate degree.

R: Returning/Re-admit Student

A student who is returning to complete their most recent degree/certificate at The University of Scranton.

V: Visiting Student

A non-degree student who is attending The University of Scranton for the purpose of transferring credits to their home institution.

Student Residence Codes

D: Residential Student

A student who lives in University -owned/-operated/-affiliated housing.

L: Living w/ parent/legal guardian

A student who lives with his/her parent or legal guardian.

M: Living with other relative(s)

A student who lives with relatives other than his/her parent or legal guardian.

O: Off-Campus

A student who lives in his/her own dwelling or is renting a dwelling that is not University -owned/operated/-affiliated.

First Generation Student

Beginning in fall 2016, the University adopted the Common Application as its exclusive application for admissions. The Common Application collects information from students about their parents' education following Federal guidelines, as defined under the Higher Education Act of 1965, to classify students as first-generation. The term “first generation college student” is defined as:

- (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

(Source: Office of Admissions & Enrollment, Common Application web site <http://www.commonapp.org/>)

This data is collected first in our Admissions CRM system, currently Slate, and moves into the Banner ERP as a student attribute in the admissions module (SARAATT_ATTTS_CODE); when a student deposit is received the attribute SGRSATT_ATTTS_CODE is populated in the student system record. This attribute is present for all enrolled students.

The student attribute is coded as FRST (first generation) if neither parent received a degree, these students are considered first generation.

Data on the number of first generation students enrolled can be obtained using the following Argos student reports: GEN_STUDENT_CSV or GEN_STUDENT_CONFIDENTIAL_CSV (includes gpa data) which are managed under the data stewardship of the Registrar’s Office.

Data Source: Common Application, Office of Admissions & Enrollment

Notes: Data is available starting in fall 2013, but is incomplete as the Common Application was not used exclusively until fall 2016.

Date	Audit Trail of Changes
October, 2016	Admissions Office

Responsibilities in the Event of a Student Death

- A. Office of Student Formation and Campus Life, in consultation with student's Dean's 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 information that Financial Aid asks the Bursar's Office 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. Contact Registrar’s Office if student is not marked deceased in Banner
2. Adjust student’s donor category
3. Add exclusion code of NCL with comment “deceased”
4. Process student’s parents according 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 will work with the Bursar’s office to return any funds that remain on account.
3. Account de-provision follows the timeline in place for all students.

I. Admissions

1. Deceased students with an admissions status of “prospect” are removed from the Slate system.
2. Deceased students who have an admissions status of “inquiry” or “applicant” are given a 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

Local Address Collection

Student Life had requested an application to collect data from a returning student on their plan on where they will live in the next Fall Semester. (On-campus, Off-campus, commuter, not in Scranton for the fall semester, or not sure). Off-campus addresses were collected as part of the application. This was collected in Mid-March with the application going live on 3/24 in 2021. The process is called LOCADR and Student Life had an Administrative portion which allowed them to keep sending reminders to students that hadn't completed. The deadline was 5/3 in 2021 to put a SB Hold (Student Life hold code on the student's record until the student completes. The SB Hold/Student Life code prevents students from viewing their transcripts and Grades.

In Early August (done on 8/3 in 2021), IT wrote a process with ARGOS called which puts the 'LO' address on the student Banner record from the temporary table.

Financial Aid will look at using this information each year instead of collecting it through a separate communication.