



THE UNIVERSITY *of*
NEW MEXICO

Banner General Person: Data Entry Standards and Procedures (General Person 102)

Class Scope – GP Update (GP102)

- How to create a person as new
- How to enter GP data
- How to change GP data
- Who may change data and under what circumstances
- Specifically:
 - Forms used to enter GP data
 - Standards and procedures used to enter data
 - Standards and procedures used to make changes to data
 - Resources for handling exceptions and questions

Creating a Person

Creating a Person

- After you have searched and are sure the person is not in Banner you must create them as new.
- The only way to enter a person new into Banner is through the GOAMTCH form.
- After you have searched again in GOAMTCH, entering all the data you have (Name, address, phone, dob, SSN, email)
 - click Yes on the ‘No matches found, create as new?’ message box or
 - click on the Create New button.

GOAMTCH – create new

Common Matching Entry GOAMTCH 8.6 (DEVL)

ID: Matching Source: Priorities: 1.SSN/NAME Req'd; 2. Name,StreetLine1 Req'd;...

[View Comments](#)

Data Entry

Last Name:
First Name:
Middle Name:
Address Type: MA
Street Line 1:
Street Line 2:
Street Line 3:
City:
US State: NM
ZIP or Postal Code: Override
NM County:
Foreign Nation:

Non-Person Name:
SSN/SIN/TIN:
Birth Date: Day: Month: Year: **Gender:**
Telephone Type: MA
Telephone:
E-mail Type: ALTN
E-mail:
Additional ID Type:

[View Comments](#)

Match **Potential Matches**

ID	Name	SSN/SIN/TIN	Birth Date	Gender	Additional ID	Telephone	E-mail

Matching Rule Sets

No Matches

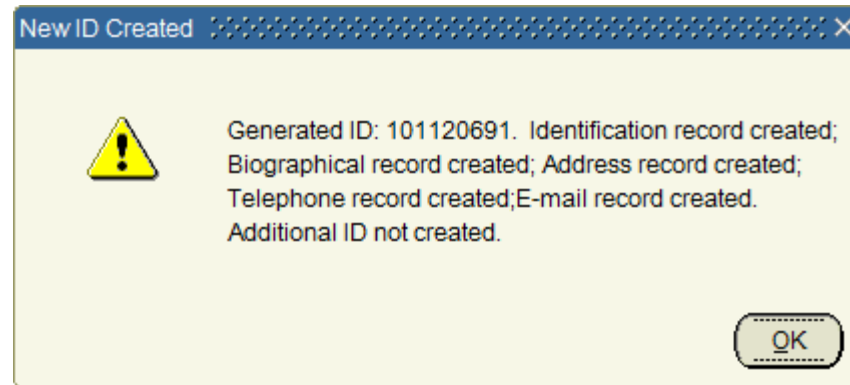
All Addresses
All Telephones
All E-mails

Banner

No matches found, create as new?

GOAMTCH – create new

- After you create new you will see a message box saying what the new ID is and records where created.



- You will be automatically returned to the form you were on before entering GOAMTCH.

Entering and Changing Name Data

Names

- Only one current name will be stored for each person
- The name entered must be the person's full legal name – the name on their Social Security card.
- Previous names are kept in the Banner database as alternate names. There is only one current name stored, but there may be multiple previous names.
- In all cases, if the person's record contains an SSN, **a new Social Security Card must be presented to change a name.**

Entering a Name

- On SPAIDEN or PPAIDEN, retrieve the person's data.
- On the Current Identification tab type in the name.
- Click Save.

The screenshot shows a web interface with a tabbed menu at the top. The 'Current Identification' tab is active. Below the tabs is a dropdown menu. A horizontal yellow line separates the tabs from the main content area. The main content area is titled 'Person' and contains an 'Override Name Parse' checkbox. Below this are five input fields: 'Last Name' (containing 'Test'), 'First Name' (containing 'General'), 'Middle Name' (containing 'Person'), 'Prefix' (empty), and 'Suffix' (empty). Each of the first three fields has a dropdown arrow on its right side.

Changing a Name

- **Overview:** Three situations can cause a name update to be performed:
 - Legal name correction
 - Legal name change
 - The correction of a misspelling or a typo.
- **What office(s):** Registrars Office, Admissions Office, HR EDCs, and Payroll
- **Under what circumstances:**
 - The current name is not the person's legal name (the name on their SSN card)
 - Missing middle name
 - Nickname
 - The person has a legal name change
 - Marriage, divorce, or name change
 - The legal name was misspelled.
 - Dwane instead of Duane

Legal Name Changes

- **Paperwork required:** Legal name corrections and Legal name changes require the following documentation:
 - Completion of Employee Demographic Form or Name, Address and Social Security Number Change Authorization Form
 - Social Security Card with the new name
 - Plus one item from the following list:
 - Driver's License, Passport, Military ID, Lobo ID
 - In addition to the items above, an employee must complete a new I-9 form, Employment Eligibility Verification. The documents will be physically stored in the employee's personnel folder
- **Method:** After the required documents and forms have been received, retrieve the person's data on SPAIDEN or PPAIDEN.
 - On the Current Identification tab, overwrite the name.
 - Click Save

Correcting a Misspelling or Typo

Correcting a misspelling or typo can be done with the original information - the person does not have to come into the office.

- On SPAIDEN or PPAIDEN retrieve the person's data.
- On the Current Identification tab overwrite the name.
- Click Save.
- Remove incorrect name from Alternate ID tab.

Understanding the Alternate Identification Tab

Alternate Identification Tab

General Person Identification SPAIDEN 8.2 (DEVL)

ID: 101282206 Test, General P.

Generate ID: 

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

Alternate Names or IDs

Name Type: Change Type: Name
ID: 101282206
Last Name: Test
First Name: Person
Middle Name:

Origin: GOAMTCH
User: JKGREEN
Activity Date: 10-NOV-2010
Create User: JKGREEN
Create Date: 10-NOV-2010

Name Type: Change Type: ID
ID: K38462
Last Name: Test
First Name: Person
Middle Name:

Origin: PER-SEQ-NUM
User:
Activity Date: 26-APR-2007
Create User: LEGACY
Create Date:

Alternate Names or IDs

Banner keeps a history of the two types of identification records:

- ID: Legacy Ids (Per-Seq-Num), other Banner generated Ids (Web Ids) and inactive Banner Ids that result from merging duplicates.
- NAME: Former names.

The two types of records are distinguished by the Change Type box.

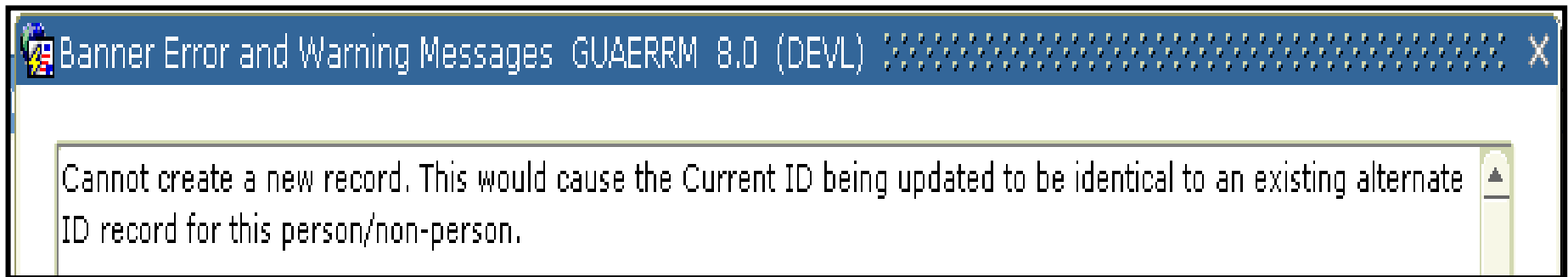
The screenshot shows a web interface with tabs for 'Current Identification', 'Alternate Identification', 'Address', 'Telephone', 'Biographical', 'E-mail', and 'Emergency'. The 'Alternate Identification' tab is active. Below the tabs, there are two sections for 'Alternate Names or IDs'. Each section has a 'Name Type' dropdown, an 'ID' field, and a 'Change Type' dropdown. The first section has 'Name' selected in the 'Change Type' dropdown, and the second section has 'ID' selected. Blue arrows point to these dropdowns with the labels 'Name' and 'ID' respectively. The 'Name Type' dropdowns are currently empty. The 'ID' fields contain '101282206' and 'K38462'. The 'Last Name' field contains 'Test' and the 'First Name' field contains 'Person' for both records. The 'Middle Name' field is empty for both.

It is important to retain both types of records so a person's history can be researched and because GOAMTCH will look at alternate names to find name matches.

The only time a historical name should be removed is when it gets in the way of performing a name change.

Banner will allow only one occurrence of a name in history.

If you get this error while trying to perform a name change:



You must search the Alternate Identification Tab for an occurrence of a name identical to the name you are trying to change.

– the old name as it appears on the Current ID tab–

Highlight and remove that record (Record menu, Remove) and Save The Change Type box must say Name.


Practice

1. Select yourself. Change your last name to Smith. Save. Rollback.
2. Change your name back to the original. Save. Rollback.
3. Change the name to Smith again. Save.
You should have received the error by now.
4. On the alternate tab find the record with the name identical to the one you are trying to change with the NAME change ind.
5. Select Record | Remove, OK. Save.
6. On the current id tab try the change again.



Entering and Changing Address Data


ADDRESS TAB

General Person Identification SPAIDEN 8.2 (DEVL)

ID: 101282206 Test, General P. Generate ID: 

Current Identification | Alternate Identification | **Address** | Telephone | Biographical | E-mail | Emergency Contact | Additional Identification

From Date: 22-JUL-2010  **To Date:** 

Address Type: MA  Mailing

Sequence Number: 1


Street Line 1: 3436 Calle Del Monte NE


Street Line 2:


Street Line 3:


Foreign Province:


City: Albuquerque

US State: NM  New Mexico


ZIP or Postal Code: 87106-1204 

NM County: 001  Bernalillo

Foreign Nation: 

Telephone Type: MA  Mailing

Inactivate Address

Source: 

Override Address Verification

Delivery Point: 36





Correction Digit: 2

Carrier Route: C008

Last Update

User: AWILLIS

Activity Date: 22-JUL-2010

Area Code  **Phone Number**  **Extension**  

Street line two; press NEXT PRIMARY KEY for Zip Code.

Record: 1/2 | ... | <OSC>

Addresses

- The default address type is MA for Mailing.
- A person can have **one active address for each address type** in Banner. Identical addresses should not be entered as different address types.
- County: The County field is being used for New Mexico counties only and will automatically populate with use of zip code. You never need to enter data in this field.

Address Types

Address Code	Address Type	Description and Usage
AP	Accts Payable	Used only by the Accounts Payable Offices for LoboMart Vendor addresses.
BI	Billing	Used by the Accounts Receivable Offices for customers (including students if different than their mailing address). Available in DSS.
BK	Bookstore	Used only by Accounts Payable for Bookstore Vendor addresses
BU	Business	Used only by Accounts Payable and the Purchasing Offices for Vendor addresses.
MA	Mailing	UNM's default address type, MA should be used if only one address exists. Used by all updating offices. Available in DSS.
GR	Grant Billing	Used only by the Research Accounting Offices for Agency addresses.
PE	Permanent	Used by Recruitment for a student's permanent address and by GEO for International Student's and Scholar's home country (foreign) address. Available in DSS.
PH	Physical	Address where one physically lives, if different than their mailing address (MA is a PO Box). A PH address is required for international students.
RH	Residence Hall	Used only by Student Housing for students living in one of UNM's residence halls. Automatically updated by Housing each semester.

Address Verification Functionality

- Only checks U.S. addresses (Nation field is blank)
- All address types will be verified except RH (Residence Hall)
- Checks addresses against the U.S. Postal Service database of deliverable addresses, which is updated monthly
- Gives error code for invalid addresses. Examples: Street Number Invalid, Suite/Apt Missing, Unknown Street

Address Formatting Functionality

The diagram illustrates the address formatting process. On the left, a form with the following fields is shown:

- Street Line 1: 1503 marin luther king
- Street Line 2: (empty)
- Street Line 3: (empty)
- City: (empty)
- State or Province: (empty dropdown)
- ZIP or Postal Code: 87106 (with a dropdown arrow)
- County: (empty dropdown)
- Nation: (empty dropdown)

A light blue arrow labeled "tab" points to the right, where the formatted address is displayed in a form:

- 1503 Dr Martin Luther King Jr
- (empty)
- (empty)
- Albuquerque
- NM (with a dropdown arrow) New Mexico
- 87106-4505 (with a dropdown arrow)
- 001 (with a dropdown arrow) Bernalillo
- (empty dropdown)

- Formats addresses to match U.S. Postal Service standards (see Appendix A for complete list)
- Removes punctuation, standardizes street and directional abbreviations
- Fills in city and state fields
- Adds +4 to zip code
- Adds county code for NM addresses

How to Enter an Address

1. Select Record, Insert for a blank address form
2. Enter Address Type (MA, BU, PE, etc.)
3. Enter Street Line 1
4. Enter a Zip Code or enter City and State
5. Tab out of field and...
6. Presto, a verified address appears! City, New Mexico county code, and zip+4 are filled in, and the address is formatted correctly

If an address does not verify you will receive a warning. Check that you typed it in correctly. If you did, then click OK to the error message and continue working – the address will be saved when you save and exit the page

Changing an Address

Encourage students and employees to change their address information using Demographic Self Service (DSS)! The changes will automatically be updated in Banner.

- **Overview:** When mail is returned or a person informs an office that their address is no longer valid the old address must be inactivated and a new address must be entered.
- **What office(s):** All updaters.
- **Under what circumstances:** Returned mail or request by person.
- **Paperwork required:** None
- **Method:**
 - Select the address to be inactivated.
 - Check the Inactive Address box and enter the current date in the To Date box.
 - Click Save
 - Enter new address (if available)

Street Line Examples

US Addresses

	Example 1: ?	Example 2: APO	Example 3: Long Street Name
Street Line 1:	Ste 202	SSBT Dennis Becker	1505 Dr Martin Luther King Jr Ave NE
Street Line 2:	1356 S Executive Dr	Unit 2050 Box 4190	
Street Line 3:			
Foreign Province:	Always blank	Always blank	Always blank
City:	Albuquerque	APO	Albuquerque
US State:	NM	AP	NM
ZIP or Postal Code:	87016	96522-1215	87106-4505
Foreign Nation:	Always blank	Always blank	Always blank

International Addresses

	Example 1: Canada	Example 2: UK	Example 3: China	Example 4: Mexico
Street Line 1:	402 6190 A Gronomy Rd	2 Worsley Place	354 Fenglin Road	Paseos De Las Cumbres 2908
Street Line 2:			PO Box 32	
Street Line 3:				
Foreign Province:	BC	Skellow		Chihuahua
City:	Vancouver	Doncaster	Xhanghai	Ciudad Juarez
US State:	Always blank	Always blank	Always blank	Always blank
ZIP or Postal Code:	V6T 123	ON6 8NW	200032	32545
Foreign Nation:	CA	UK	CH	MX

Practice


1. Add a new MA address to yourself with a typo.
2. Correct the address.
3. Add a phone number to the MA address
4. Inactivate the new MA address
5. Add an international PE address (15 Khalf El-Obour, Nasr City, Cairo, TK201CZ, Egypt)

Debrief – what tricks and Banner “gotcha’s” did you find?

Entering and Changing Telephone Data

TELEPHONE TAB

ID: 101282206 Test, General P.

Generate ID: 

Current Identification | Alternate Identification | Address | **Telephone** | Biographical | E-mail | Emergency Contact | Additional Identification

Telephone Type: MA Mailing
International Access:
Comment:
Address Type: Sequence:

Area Code: 505 Phone Number: 2423117 Extension:
 Primary Unlisted Inactivate
Activity Date: 22-JUL-2010 User: AWILLIS

Telephone Type: CE Cell
International Access:
Comment:
Address Type: Sequence:

Area Code: 707 Phone Number: 2498746 Extension:
 Primary Unlisted Inactivate
Activity Date: 10-NOV-2010 User: JKGREEN

Telephone Type:
International Access:
Comment:
Address Type: Sequence:

Area Code: Phone Number: Extension:
 Primary Unlisted Inactivate
Activity Date: User:

Telephone Numbers

- A Person or Non-Person may have multiple telephone numbers.
- A telephone number can be entered without an address or can be associated with an address.
- A Telephone Type has been defined for each Address Type as well as one for a fax, a cell phone and a campus phone number.
- Cell phones should always be entered as type CE.
- You can associate a cell phone with a MA address by selecting CE as the phone type on the Address Tab.

Telephone Types

Address Code	Address Type	Description and Usage
BI	Billing	Phone number associated with a Billing address .
BK	Bookstore	Phone number associated with a Bookstore address.
BU	Business	Phone number associated with a Business address.
CE	Cell	A cell phone number – may be associated with an Address of any type.
FAX	Fax	A phone number that accepts facsimiles.
GR	Grant Billing	Phone number associated with a Grant Billing address.
MA	Mailing	Phone number associated with a Mailing address.
PE	Permanent	Phone number associated with a Permanent address.
PH	Physical	Phone number associated with a Physical address.
RH	Residence Hall	Phone number associated with a Residence Hall address. Updated by Housing only.
CA	Campus	Phone number associated with a staff or faculty office phone number.

Entering a Phone Number

- US Telephone Numbers:
 - Do NOT enter parentheses, dashes or any other punctuation.
 - Type area code in Area Code field.
 - Type 7 digit telephone number in the Phone Number field with no dashes.
 - Type extension digits with no words (Ext, etc).
- International Telephone Numbers:
 - Type the telephone number in as it is presented by the person or the document.
 - Use Area Code and Phone Number fields as necessary.

Changing a Phone Number

- Telephone Type is a required field. Click on the drop-down box and select the appropriate Telephone Type.
- Enter the 10-digit telephone number (NO dashes). Enter the extension if available.
- To associate a phone number with an address, complete the Address Type and Sequence fields.

Practice

1. Add a new CE phone number
2. Inactivate a phone number
3. Add a new phone number from the Address tab
4. Add a new international phone number (+44 207 831 3123)


Debrief – what tricks and Banner “gotcha’s” did you find?

Entering and Changing Biographical Data

Biographical Tab

General Person Identification SPAIDEN 8.2 (DEVL)

ID: 101282206 Test, General P.

Generate ID: 

Current Identification | Alternate Identification | Address | Telephone | **Biographical** | E-mail | Emergency Contact | Additional Identification

Gender: Male
 Female
 Not Available


Birth Date: 26-SEP-1981 

Age: 29


SSN/SIN/TIN: 123123412

Confidential

Deceased

Deceased Date: 

Citizenship: 1 Citizen or National of the US

Marital Status: 


Religion: 


Legacy: 

 **No longer used**


New Ethnicity: Not Hispanic or Latino

Ethnicity and Race Confirmed

Confirmed Date: 10-NOV-2010 

Veteran File Number: 

Veteran Category: None

Active Duty Separation Date: 



Armed Forces Service Medal Indicator

Special Disabled Veteran

User: JKGREEN

Activity Date: 10-NOV-2010


Race


4 White
51 Navajo Dine


User

JKGREEN
JKGREEN


Activity Date

10-NOV-2010
10-NOV-2010


FRM-40400: Transaction complete: 1 records applied and saved.

Record: 1/1 <OSC>

Date of Birth

- The Date of Birth is a key identifier and should be entered whenever possible.
- NOTE that the month and day fields are backwards on GOAMTCH, with day coming before month. Be very careful when entering DOB on GOAMTCH.
- Can be entered as 13-JAN-1988 or 01/13/1988 on the *IDEN forms.
- Banner will calculate age automatically once the DOB is entered and you tab out of the field.

Changing a Date of Birth

What office(s): Registrar's, Payroll, GEO, Admissions, and Human Resources offices

- **Under what circumstances:** Upon receiving the required information.
- **Paperwork required:**
 - Completion of Employee Demographic Form or Name, Address and Social Security Number Change Authorization Form
 - A form of picture identification with the birthday and name and
 - One of the following photo IDs: Driver's License, Passport, Military ID, Lobo ID
- **Method:**
 - On the Biographical tab, overtype the DOB.
 - Click Save

Citizen Code

- Citizen Code is required by Payroll and Taxation, so use caution when changing it.
- You can not blank out the Citizen code.
- Non documented students should be a 5.
- Only change to a 1 or 2 if the person has permanent resident paper work.

Valid Codes:

Code	Desc	Citizen
1	Citizen or National of the US	Y
2	Permanent Resident	N
3	Alien	N
3R	Alien (Payroll Use Only)	N
5	Unknown	N

Social Security Number

- For Persons, the Social Security Number (SSN) is entered.
- For Vendors, the Tax Identification Number (TIN) is entered.
- Vendors who do not have an Employer Identification Number (EIN) issued to businesses use their personal SSN as their TIN.
- Employees must provide an I-9 document (Federal Employment Eligibility Verification form) along with appropriate documentation of identity and work status.
- Students provide their Social Security Number on their application for admission or their Application for Federal Student Aid (FAFSA).

Changing a SSN

- **Overview:** SSN may have to be changed or added to a person's/non person's data when the information becomes available. Each time a SSN is changed a history of the old and new SSNs are kept in Banner. The history can be viewed on form GUITINH
- **What office(s):**
 - Registrar's, Payroll, GEO, Admissions, or Human Resources offices
 - If the SSN is keyed incorrectly from the original documentation, the office with that documentation may correct it
- **Under what circumstances:**
 - The data becomes available for the first time when a student or employee presents the proper paperwork described below.
 - A SSN is proved to be incorrect on a person's records. (Usually because someone else can prove the SSN belongs to them.)
- **Paperwork required:**
 - Completion of Employee Demographic Form or Name, Address and Social Security Number Change Authorization Form
 - The person's Social Security Card
 - One of the following photo IDs: Driver's License, Passport, Military ID, Lobo ID

Changing an incorrect SSN

A history of all SSN changes can be viewed on the GUITINH form.

- **If the correct SSN is known:**
 - Retrieve the person's data on SPAIDEN or PPAIDEN
 - Click on the Biographical Tab
 - Enter the SSN
 - Click Save
 - Enter a 100 comment on SPACMNT if appropriate.
- **If the correct SSN is not known:**
 - Retrieve the person's data on SPAIDEN or PPAIDEN
 - Click on the Biographical Tab
 - Overtyping the SSN with the UNM000
 - Click Save
 - A 000 dummy SSN will be generated and a SPACMNT 800 comment will be inserted automatically

Duplicate SSN Errors

If you get the first WARNING go ahead and click SAVE. The system will not allow you to save the SSN, but the second error message will display, showing the Banner ID and the name of the person to whom the SSN already belongs.

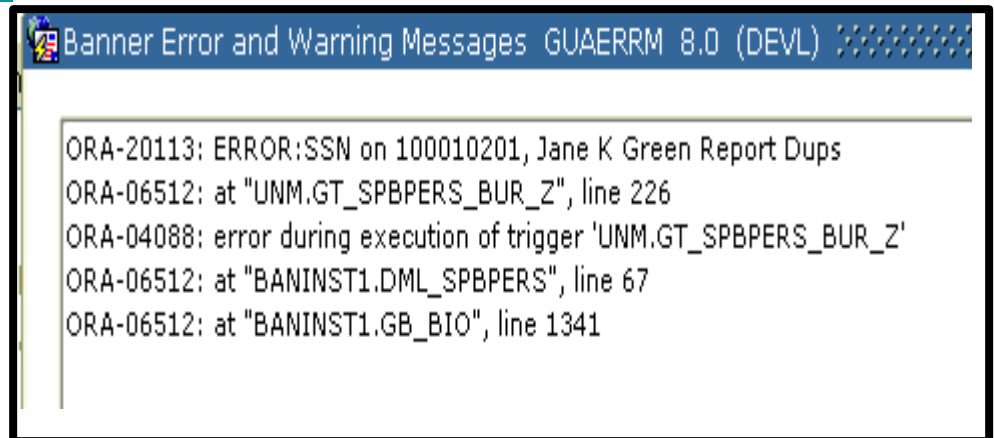
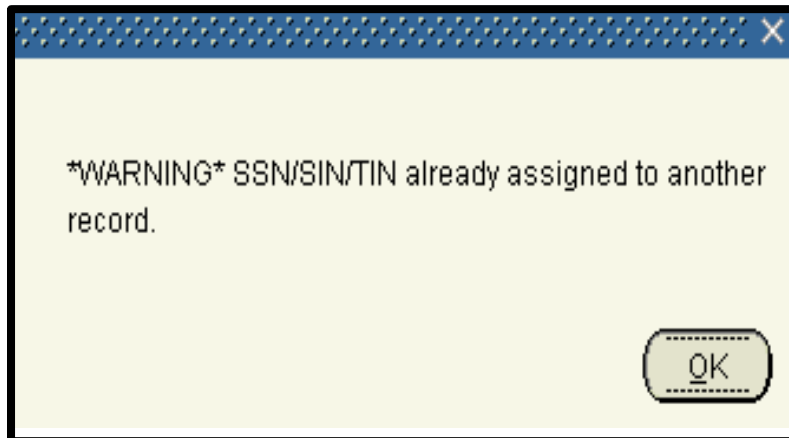
Check that ID to see if it is the same person. If so, report to DUPBUSTER's.

If not and you have proof (the SSN card) that the SSN belongs to your person you must obtain a 999 number, replacing the SSN on the other person's bio tab.

- Use caution when doing this -

MAKE SURE THE OTHER PERSON IS NOT AN EMPLOYEE!

Contact qp@unm.edu for assistance if needed.



GUITINH

ID:

SSN/SIN/TIN:

Entity Selection

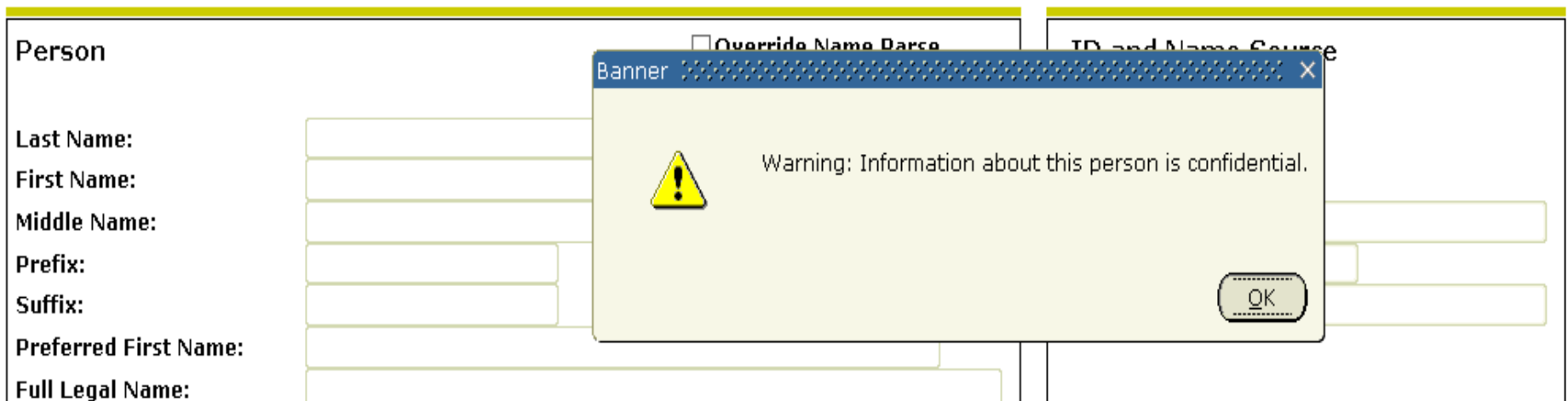
ID	Entity	Name	Current SSN/SIN/TIN	Birth Date
=> 101282206	P	General Person Test	123123412	26-SEP-1981

History

SSN/SIN/TIN Changed From	SSN/SIN/TIN Changed To	Changed By	Date Changed	Time Changed
393393993	123123412	JKGREEN	10-NOV-2010	13:06:57

“Confidential” Checkbox

- Applies to students only
- **Set by the Registrar’s Office only**, after counseling the student on the impact
- If that box is checked, you will receive a pop-up warning the first time that the student’s record is accessed in Banner.



The screenshot displays a web form for entering person information. The form includes fields for Last Name, First Name, Middle Name, Prefix, Suffix, Preferred First Name, and Full Legal Name. A checkbox labeled "Override Name Parse" is visible. A yellow warning dialog box with a yellow triangle icon and the text "Warning: Information about this person is confidential." is overlaid on the form. The dialog box has an "OK" button and a close "X" button in the top right corner.

Confidentiality Response

- If the “Confidential” box is checked, you must not even acknowledge that the student is in the system. Respond as follows:
“I’m sorry, I have no information on this person as a student. If you feel this is in error please have the student go to the Registrar’s Office with a valid photo ID.”
- If they reply that they are the student, say: “The system I that I can access right now over the phone doesn’t have you in it. Come in to the Registrar’s Office with a photo ID and we can check the other system.”
- If someone is both student and staff and has a confidential flag, then only public employee info (directory information) should be released, nothing about their student status

Other Data Elements on Biographical Tab

- Marital Status, Religion, and Legacy: not used – do not enter them
- Deceased Indicator:
 - Entered by the Registrar’s Office (students) or the Benefits Office (employees) only
- Gender:
 - Required for Payroll. Click on the radio button to select gender code
- Veteran File Information:
 - Enter Veteran File Number, Veteran Category and Active Duty Separation Date if available.
 - Check Armed Forces Service Medal Indicator and Special Disabled Veteran if applicable.
- New Ethnicity:
 - Select from the drop down box.
 - Check Ethnicity and Race Confirmed indicator.
- Race:
 - Select all that apply.
 - If a person wants to change their race delete the old race codes and select the new one(s).

Practice


1. Change you Date of Birth
2. Try to enter your SSN
3. Try to delete your SSN
4. Enter the following race and ethnicity for a person: Hispanic, White, and Asian
6. Check the confidentiality indicator for yourself, leave the form, and come back into it. Remove the indicator.

Debrief – what tricks and Banner “gotcha’s” did you find?

Entering and Changing Email Data

EMAIL TAB

ID: 101282206 Test, General P.

Generate ID: 

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

E-mail Type: UNM @unm.edu email address

E-mail Address: gptest@unm.edu

Preferred Inactivate Display on Web URL

Comment: Activity Date: 10-NOV-2010 User: JKGREEN

E-mail Type: ALTN Alternate (non @unm.edu) email address

E-mail Address: genper@hotmail.com

Preferred Inactivate Display on Web URL

Comment: Activity Date: 10-NOV-2010 User: JKGREEN

E-mail Type:

E-mail Address:

Preferred Inactivate Display on Web URL

Comment: Activity Date: User:

Email Addresses

- **Never enter, update or inactivate a UNM type email in INB.**
 - UNM email addresses are maintained automatically by the system.
 - Only “person’s netid”@unm.edu are UNM type email.

- **All other email addresses are entered as ALTN.**
 - coach@unm.edu
 - @salude.unm.edu

Email Addresses

- There are 2 email types: UNM and ALTN (alternate)
- **Never enter a UNM type email in INB.** These addresses are automatically created when a person gets a UNM NetID.
- Each active student or employee should have one active @unm.edu email address with the type of UNM.
- Each person should have only one preferred email
- If the e-mail address has @salud.unm.edu, @gallup.unm.edu, etc., it is designated as e-mail type ALTN and is the preferred e-mail, even if there is an existing UNM email address.
- Demographic Self Service allows a person to enter a non-UNM email address that is displayed in the UNM Online Directory. If a preferred email is not entered, the @unm.edu email will be displayed, if available.
- Some people have ALTN @unm.edu email addresses (Coaches, Managers, etc). The person must go to IT's Computer Accounts to create these email addresses. These emails may be entered in INB as type ALTN.

Changing Email Addresses

- E-mail address changes may be done through Demographic Self-Service (DSS) and are automatically updated in Banner.
- If there is no @unm.edu e-mail, use the “ALTN” type and check the “PREF” checkbox.
- The Preferred check box may be checked on **one e-mail address only**, either UNM or ALTN.

Practice


1. Add an ALTN email address
2. Change an ALTN email address
3. Add a UNM email address
4. Change a UNM email address
5. Make an ALTN email address the active preferred address
6. Inactivate an ALTN email address
7. Inactivate a UNM email address

Debrief – what tricks and Banner “gotcha’s” did you find?

Entering and Changing Emergency Contact Data

EMERGENCY CONTACT TAB

ID: 101282206 Test, General P.

Generate ID: 

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

Priority: 1
Relationship: B Brother

Telephone

Area Code: Phone Number: 2651234 Extension:

Last Name: Test
First Name: James
Middle Name:

Address Type: MA Mailing

Override Address Verification

Street Line 1: 300 General Marshall St NE Apt 1
Street Line 2:
Street Line 3:
Foreign Province:
City: Albuquerque
US State: NM New Mexico
ZIP or Postal Code: 87123-1064
Foreign Nation:

Last Update

User: JKGREEN
Activity Date: 10-NOV-2010

Emergency Contacts

Missing Student Procedure

The University of New Mexico has developed a response procedure to reports of missing students, as required by the U.S. Higher Education Opportunity Act of 2008. Emergency Contacts will be the information used first during an emergency, including in the event a student is presumed missing.

The emergency contact information will remain in effect throughout the duration of the student's academic career at UNM. The student is encouraged to update that information when appropriate and may do so at any time.

All students should indicate emergency contact information through



[Personal Information](#) , [View/Update Emergency Contacts](#)

Emergency Contacts

Standards:

- Priority must be selected.
- Relationship must be selected.
- Enter name, address and telephone number

Relationships:

Relationship Validation (STVRELT)

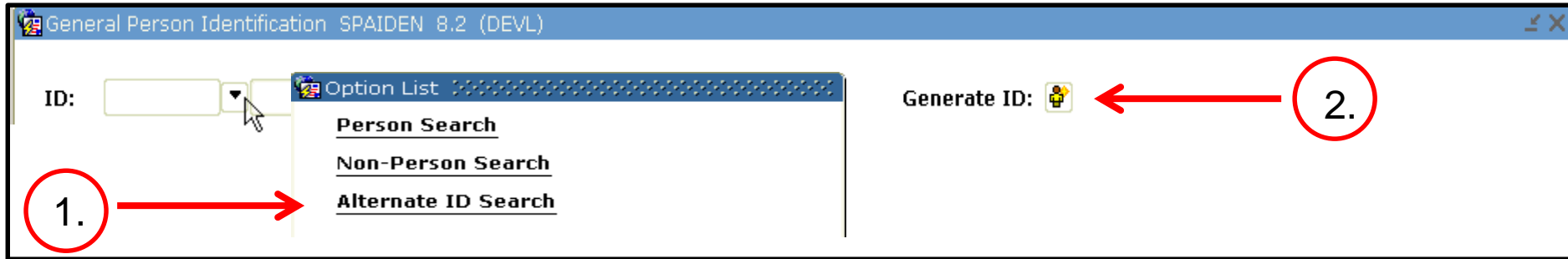
Find %

Code	Description	Activity Date
A	Ex-spouse	19-DEC-2005
B	Brother	19-DEC-2005
C	Child	19-DEC-2005
F	Father	19-DEC-2005
G	Grandparent	19-DEC-2005
M	Mother	19-DEC-2005
N	Neighbor	19-DEC-2005
O	Relative	19-DEC-2005
P	Spouse	19-DEC-2005
R	Friend	19-DEC-2005
S	Sister	19-DEC-2005
U	Guardian	19-DEC-2005
X	Significant Other/Partner	19-DEC-2005

Find OK Cancel

Creating a New General Person Record

Creating a New General Person Record



Start in SPAIDEN or PPAIDEN

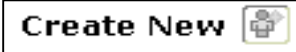
1. Click on the ID box drop down and select Alternate ID Search

- Search using
 - Partial last name with % wildcards, partial first name with %s.
 - Add middle initial with %.
 - Partial first name with %, DOB and/or partial DOB with %.
 - SSN and/or partial SSN with %.

Return to the IDEN form.

2. Click on the Generate ID button to go to GOAMTCH.

- Search using
 - All of the data you have available
 - Remove SSN

3. If **not** found in step 1 or step 2 click on the  button. You will return to the IDEN form you started from. Confirm the ID is formatted correctly.

4. If **found** click on the  button.

Basic GP Flows

- Inquiry (view data only)
Search → Find correct person
- Update data
Search → Find → Update
- Create new General Person record
Search → DON'T find → Create record

Search Summary

- Use different forms
 - SOAIDEN: Evoke SOAIDNS for details
 - GUIALTI: No last name, partial birth date
 - GOAMTCH: Use details button and Address drop down
 - GUISRCH: Additional ID, email and phone search
- Search different ways: Partial name; Name only; Name and birth date; First name and DOB; Name, DOB, and SSN, etc
- Use wildcards: % and _
- Broaden your search: Remove some data
- **BE SURE!**

Search Practice Exercises

Search Exercise #5: Problem

Should Michael I. Chavez be added to Banner? His address is on Piermont Drive in Albuquerque. He is graduating early from Highland High School and hopes to get the Regents Scholarship.

Search Exercise #6: Problem

Is this person already in Banner? If so, what is his Banner ID number?

- Name: Herman Eduardo Trujillo
- DOB: 20-AUG-1965
- SSN: 525253405
- Address: unknown

Search Exercise #7: Problem

Is this person already in Banner? If so, what is her Banner ID number?

- Name: Jackie Torrez
- DOB: 08-JUL-1987
- SSN: unknown
- Address: Mesquite, NM

Search Exercise #8: Problem

Is this person already in Banner? If so, what is her Banner ID number?

- Name: Abbie Jones
- DOB: 26-JAN-1974
- SSN: unknown
- Address: Roswell, NM

Searching – How much, how long?

- UNTIL YOU ARE SURE
- If you are not sure, DON'T DO IT!
- Search at least 3 different ways. Use different forms, wildcards, and broader searches to confirm your results

Next Steps

- Take Certification Exam
- If you pass with 80% or better, request appropriate security role through the BAR (bar.unm.edu)
- If you don't pass exam, take class again and take test again until you pass.

Requesting the GP Role in BAR

The screenshot shows a web browser window titled "BAR - View Roles - Mozilla Firefox". The address bar contains the URL: <https://bar.unm.edu/rolesDisplay.cfm?CFID=99553&CFTOKEN=62730988#Generz>. The main content area is titled "General Person Roles" and contains a table with the following columns: "Add", "Training", "Role Name", and "Role Description".

Add	Training	Role Name	Role Description
<input type="checkbox"/>	Training complete	Academic History Duplicate Certifier	RESTRICTED: PIDM Merge Certifier
<input type="checkbox"/>	Training complete	Accounts Receivable Duplicate Certifier	RESTRICTED: PIDM Merge Certifier
<input type="checkbox"/>	Training complete	Admissions Duplicate Certifier	RESTRICTED: PIDM Merge Certifier
You have it	Training complete	BAA Administration	Grants access to the Banner Authorization Administration Application. This gives the ability to query security structure setup.
<input type="checkbox"/>	Training complete	Disability Services Certifier	RESTRICTED: PIDM Merge Certifier
<input type="checkbox"/>	Training complete	FTP Server Access Role	RESTRICTED: Limited to those users who will be accessing UNM's server for FTP upload/download processing.
<input type="checkbox"/>	Training complete	Faculty Duplicate Certifier	RESTRICTED: PIDM Merge Certifier
<input type="checkbox"/>	Training complete	Financial Aid Person Duplicate Certifier	RESTRICTED: PIDM Merge Certifier
<input type="checkbox"/>	Training complete	GP Inquiry Role 1	General Person search and view General Person data without access to SSN, includes international data.
<input type="checkbox"/>	Training complete	GP Inquiry Role 2	General Person search and view General Person data with access to SSN, includes international data.
<input type="checkbox"/>	Training complete	GP Update Role 1	Limited update for General Person (Name, Address, Email, Telephone, and Emergency Contact), includes search by SSN.
<input type="checkbox"/>	Training complete	GP Update Role 2	RESTRICTED: Full update for General Person data.
You have it	Training complete	General Person Duplicate Certifier	RESTRICTED: PIDM Merge Certifier
<input type="checkbox"/>	Training	Human Resources	RESTRICTED: PIDM Merge Certifier

Contacts

All General Person questions:

gp@unm.edu