



THE UNIVERSITY *of*
NEW MEXICO

Banner General Person Data Entry Standards and Procedures

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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

Person Override Name Parse

Last Name: Test
 First Name: General
 Middle Name: Person
 Prefix:
 Suffix:
 Preferred First Name:
 Full Legal Name:

Non-Person
 Name:

ID and Name Source

Last Update

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

Original Creation

User: AWILLIS
 Create Date: 26-APR-2007

Navigation was attempted to an item that is disabled or not valid; go to another item to continue. It may be necessary to use the mouse.
 Record: 1/1 ... <OSC>

Figure 1 Current Identification Tab

Common Matching Entry GOAMTCH 8.5.1 (BANP) View Comments

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

Data Entry

Last Name: Non-Person Name:
 First Name: SSN/SIN/TIN:
 Middle Name: Birth Date: Day: Month: Year: Gender:
 Address Type:
 Street Line 1: Telephone Type:
 Street Line 2: Telephone:
 Street Line 3: E-mail Type:
 City: E-mail:
 US State: Additional ID Type:
 ZIP or Postal Code: Override Additional ID:
 NM County:
 Foreign Nation:

Match Potential Matches

ID	Name	Matched Address	Telephone	E-mail
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	SSN/SIN/TIN Birth Date Gender	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	Additional ID	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Clear and Return to Data Entry <input type="button" value="v"/>		All Addresses	All Telephones	All E-mails
Matching Rule Sets		<input type="text"/>	<input type="text"/>	<input type="text"/>
No Matches				

Figure 2 GOAMTCH

1. Current Identification Tab

1.1 UNM ID

1.1.1 General Information

The UNM ID is the unique identifier that is **generated by the system** when an entity is added. To increase privacy and comply with federal and state regulations and University policy, this identifier **must never** be the Social Security Number. Contact gp@unm.edu if you see an alternate ID with the SSN as the id number

1.1.2 Procedures

1.1.2.1 Create UNM ID

- **Overview:** The UNM ID must always be generated by the system through GOAMTCH when an entity is added. **Never** create a UNM ID yourself.
- **What office(s):** All updaters
- **Under what circumstances:** The UNM ID is generated as part of the creation of a new General Person record (after thorough searching, of course)
- **Paperwork required:** None
- **Method:**
 - Click the Generate icon on SPAIDEN or PPAIDEN
 - On GOAMTCH Matching Source select *** Online Matching Rule
 - Type in as much information as you have - Name, SSN, DOB, Address, Telephone, Gender, ALTN email
 - Click on the Duplicate Check button.
 - Carefully review the Match and Potential Match tabs. If you are unsure if the person is already in Banner STOP and do more searching on GUIALTI. If possible contact the person to gather more information.

1.1.2.2 Update UNM ID

- **Overview:** Never, ever, change a valid UNM ID. Occasionally a bad ID is created during the initial entry of an entity. These IDs must be corrected. Please report any bad IDs immediately to gp@unm.edu.
- **What office(s):** All updaters
- **Under what circumstances:** If the SSN or DOB or anything else is accidentally entered as the ID during the initial entry of a person.
- **Paperwork required:** N/A
- **Method:**
 - Email gp@unm.edu with the person's name and the bad ID.

1.1.2.3 Delete/Inactivate UNM ID

- **Overview:** A valid UNM ID can never be deleted or inactivated. When a duplicate record is merged, the "from" UNM ID is added to the "to" person's record, so both IDs are on the record and neither is ever deleted.
- **What office(s):** None
- **Under what circumstances:** Never
- **Paperwork required:** N/A
- **Method:** N/A

1.2 Name

1.2.1 General Information

Only one current name will be stored for each person and will be the person's 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. See Change Type Indicators for assistance in determining the history of name changes on a person's record.

- In all cases if an SSN is in Banner, a new Social Security Card must be presented to change a name.
- If there is no SSN in Banner a name may be changed with a valid photo id.
- If a Continuing Education Student or Affiliate was entered into Banner without an SSN, their names can be changed without a Social Security Card.
- International Students and International Scholars may or may not have an SSN in Banner. Their names should only be changed based upon passport information if no SSN is in Banner.
- Names may display differently in different applications: Lobo Card truncates Middle Name, UNM Directory shows entire name.

1.2.2 Procedures

1.2.2.1 Entering Name

- **Overview:** Entering a name for the first time is the same as creating a new entity. They are being entered into Banner for the first time. The creation of a new person in Banner must be done through GOAMTCH.
- **What office(s):** All updaters. Automatic entries through 'tape loads' such as the Web Applications, FAFSA, Test Scores, etc.
- **Under what circumstances:**
 - Upon entry of a new entity.
- **Paperwork required:**
 - SSN Card,
 - I9 documents,
 - Passport,
 - Application for Admission
 - Matricula Consular
 - Alien Registration Card
 - Birth Certificate (with picture ID accompanying it of course)
 - Tape load.
- **Method:**
 - On SPAIDEN or PPAIDEN click on the Generate ID button.
 - On GOAMTCH select **Matching Source:**
 - *** Online Matching Rule for Persons,
 - Vendor Company Rule for Non Persons (Vendors).
 - Next Block.
 - Type in Name, SSN, DOB, and address or as much information as you have.
 - Click on the **Duplicate Check** button.
 - More information may be viewed by highlighting a potential match and clicking on the Details Button.
 - Carefully review the **Match** and **Potential Match** tabs. If you are unsure if the person is already in Banner **STOP** and do more searching on GUIALTI. If possible contact the person to gather more information.

1.2.2.2 Updating Name

- **Overview:** Situations that can cause a name update to be performed:
 - Legal Name correction – ex: name wrong on SSN card and with SSA
 - Legal Name change – Marriage, Divorcee, Court procedure and documents
 - The correction of a misspelling or a typo. – entered incorrectly by UNM administration
 - Name incorrect on Web application (misspelling, first name/last name transposition)
- **What office(s):** Registrars Office, Admissions Office, Purchasing, 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, application to the courts
- The name is misspelled – but only if you have an original source document with the correct spelling.
 - Dwane instead of Duane

• **Methods:**

A. Legal Name Changes.

Paperwork required: Legal name changes require the following documentation

- Completion of Employee Demographic Form - Employees
- I-9 form, Employment Eligibility Verification - Employees
- Name, Address and Social Security Number Change Authorization Form - Students
- If SSN is present in Banner
 - Social Security Card with the new name or
 - Temporary Card from SSA with new name
- If No SSN is present in Banner
 - Application for Admission
 - Matricula Consular
 - Alien Registration Card
 - Birth Certificate
- Plus one item from the following list of photo IDs:
 - Driver's License or
 - Temporary driver's license issued by the Motor Vehicle Department.
 - Passport
 - Military ID
 - Lobo ID
 - HSC ID

B. Legal Name Corrections.

Paperwork required: Legal Name Corrections following documentation

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

• **Method:**

- On SPAIDEN or PPAIDEN retrieve the person's data.
- On the Current Identification tab over type the name.
- Click Save
- Click on Options in the Main Menu.
- Select General Person Comment Form SPACMNT
-
- Enter 100 as the Comment Code
 - Type 'Name Change: 'and the reason for the change.
 -
- **ERROR** resulting from a name change.

1.2.2.3 Deleting/Inactivating Name

- **Overview:** Names can be entered incorrectly due to ineligible writing or typos. These errors should be deleted from history (the Alternate Identification tab). Do not remove other former names.
- **What office(s):** All updaters
- **Under what circumstances:** Misspelling or typo. When receiving an error upon performing a name change (See Notes on Names).
- **Paperwork required:** None other than the original documents or confirmation from the person.
- **Method:**
 - Retrieve the person's information on SPAIDEN or PPAIDEN.
 - Overtyping the incorrect, misspelled name.
 - Click Save
 - Rollback and Next Block
 - On the Alternate Identification tab highlight the incorrect, misspelled name where the Change Type box says Name.
 - From the Main Menu bar select **Record and Remove**.
 - Click Save

NOTES on Names:

- **ERROR:** If you receive the error “Cannot create a new record. This would cause the Current ID being updated to be identical to an existing alternate ID record for this person/non-person.”
 - Rollback
 - Next Block and Click on the Alternate Identification Tab
 - Look for the current name (the name you are changing from) in the list of historical names. Be sure the **Change Type** box says **NAME** and the name is **IDENTICAL** to the current name.
 - Highlight the identical name.
 - From the Main Menu bar select **Record** and **Remove**.
 - Click “Save”.
- If there is more than one Name or ID number change, use the scroll bar to view all alternate names and Ids.

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:	<input type="text"/> ▼	<input type="text"/>	Change Type:	Name ▼	Origin:	GOAMTCH	
ID:	101282206				User:	JKGREEN	
Last Name:	Test					Activity Date:	10-NOV-2010
First Name:	Person					Create User:	JKGREEN
Middle Name:	<input type="text"/>					Create Date:	10-NOV-2010
Name Type:	<input type="text"/> ▼	<input type="text"/>	Change Type:	ID ▼	Origin:	PER-SEQ-NUM	
ID:	K38462				User:	<input type="text"/>	
Last Name:	Test					Activity Date:	26-APR-2007
First Name:	Person					Create User:	LEGACY
Middle Name:	<input type="text"/>					Create Date:	<input type="text"/>

Figure 3 Alternate Identification Tab

Alternate Names or IDs

Name Type:	<input type="text"/> ▼	<input type="text"/>	Change Type:	Name ▼	← Name
ID:	101282206				e
Last Name:	Test				
First Name:	Person				
Middle Name:	<input type="text"/>				
Name Type:	<input type="text"/> ▼	<input type="text"/>	Change Type:	ID ▼	← ID
ID:	K38462				
Last Name:	Test				
First Name:	Person				
Middle Name:	<input type="text"/>				

Figure 4 Name vs. ID Change Type

2. Alternate Identification Tab

2.1 General Information

This information block is used if an individual has an alternate name an alternate id. Examples of alternate names include maiden names or other previous names. There is only one current name stored for each person, but there may be multiple previous names. Alternate ID numbers can be a UNM ID number from a merge, a legacy per-seq-num, or a Web ID. [Section 2](#) on the Change Indicator explains how to determine the history of name and ID changes.

2.1.1 Procedures

2.1.1.1 Entering Alternate IDs / Names

- **Overview:** Alternate IDs / Names are never entered on the Alternate Identification tab. They are created when a person's name changes or they are merged.
 - See Section 1.2.2.2 Updating A Name.
- **What office(s):** None
- **Under what circumstances:** Never
- **Paperwork required:** N/A
- **Method:** N/A

2.1.1.2 Updating Alternate IDs

- **Overview:** Alternate IDs / Names are never updated.
- **What office(s):** None
- **Under what circumstances:** Never
- **Paperwork required:** N/A
- **Method:** N/A

2.1.1.3 Deleting/Inactivating Alternate IDs / Names

- **Overview:**
 - Deleting an Alternate ID record is not allowed. Please email gp@unm.edu if an Alternate ID is causing problems.
 - An Alternate [Name](#) may have to be deleted to allow a name change. See Section [1.2.2.3](#) Deleting A Name.
- **What office(s):** All updaters.
- **Under what circumstances:** If a Web id is identical to another person's ID it must be removed. An alternate Name is preventing a name change.
- **Paperwork required:** None
- **Method:**
 - See Section 1.2.2.2 Updating A Name, NOTES on Names.

General Person Identification SPAIDEN 3.2 (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>

Figure 5 Address Tab

3. Address Tab

3.1.1 General Information

This information is used to record various mail types in a standardized way based upon business use. Addresses are to be entered exactly as they will print on correspondence, reports, etc. Accurate, consistent address data entry is vital. All addresses must meet US Postal Service addressing requirements.

(Refer to: <http://pe.usps.gov/cpim/ftp/pubs/Pub28/pub28.pdf>)

Encourage students and employees to change their address information using Demographic Self Service

(DSS). The changes will automatically be updated in Banner. Address types from Demographic Self Service are MA Mailing, BI Billing (if different from MA) and PE Permanent (primarily for Students).

3.1.1.1 Address Types

UNM maintains uniform list of address types based on their business purposes, rather than separate addresses for each University department. This will reduce redundant data entry and improve accuracy. Thus, an individual may be a vendor, an alumnus, an employee and a current student and only have a single address that has shared use. Additional address types may be created in the future.

Address Code	Address Type	Description and Usage
AP	Accts Payable	Used only by Accounts Payable for LoboMart Vendor addresses.
BI	Billing	Used by 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.
PA	Parent	Address of a student's parent(s).
PE	Permanent	Used by Recruitment for a student's permanent address and by OIPS for International Student's and Scholar's home country (foreign) address.
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.

3.1.1.2 Address Source

Banner Address Source codes:

Address Source Code

- CP
- US
- CP/R
- US/R
- /R
- EF
- EF/R

Description

- Consolidated Person – Legacy conversion
- Forward Address from USPS
- CP Source / Returned by USPS
- PS Source / Returned by USPS
- Self Source / Returned by USPS
- Electronic Feed
- Electronic Feed Source / Returned by USPS

If the Source of the Address is the person or company and no other Address Source is appropriate, leave the Source field blank. If mail to the Address is returned by the USPS, add a /R to the Source field.

3.1.2 Procedures

3.1.2.1 Entering Addresses

- **Overview:** Encourage students and employees to change their address information using Demographic Self Service (DSS). The changes will automatically be updated in Banner. Address types from Demographic Self Service are MA Mailing, BI Billing (if different from MA) and PE Permanent (primarily for Students). Remember Residence Hall addresses are entered only by Housing.
- **What office(s):** All updaters.
- **Under what circumstances:** Upon entering a new person or performing a change of address for an existing person.
- **Paperwork required:** Changing an individual's address affects all their University out-going mail. An office performing an address change requires either:
 - A valid picture ID, and Completion of "Employee Demographic Form" or "Name, Address and Social Security number Change Authorization Form".
 - Or
 - Notification from the Post Office that an address has been changed. (If the United States Postal Service has sent information that an address is undeliverable, update the source code on the address record to indicate such – see page 27.)
- **Method:**
 - Retrieve person's information on SPAIDEN or PPAIDEN.
 - Click on the Address tab.
 - If an address of the same type already exists you must first inactivate the old address before entering the new address by checking the **Inactive Address** box or entering the current date in the **To Date** box.
 - Click Save.
 - From the Main Menu bar select Record and Insert.
 - Type in or select the address type
 - DO NOT attempt to change the Sequence Number
 - Enter the Address lines 1 and 2. - Remember Banner is case sensitive. Consult the Data Entry Standards ([DES Appendix A](#)) for details. For example: PO Box [no periods, spaces between each letter].
 - Enter Active dates (if known)
 - **Enter Zip** or Postal Code or select from the drop down box. If the 9 digit zip is known, input 5 digits, hyphen 4 digits (example: NNNNN-NNNN).
 - **TIP:** Tabbing through the city and state fields and entering a zip code in the zip code field will automatically populate city and state. This is a good way to check if your zip code is correct.
 - **County Code** is entered automatically by the system for NM addresses only.
 - Enter the **NATION** code only for foreign addresses. Do Not enter US.
 - Enter the telephone associated with this address if it exists. Be sure to enter the area code if known and enter all seven digits of the phone number in the middle box. The last box is for extension.
 - Click Save.

3.1.2.2 Updating Addresses

- **Overview:** Addresses may be corrected without inserting a new address.
- **What office(s):** All updaters.
- **Under what circumstances:** Correcting spelling, removing punctuation and special characters, applying standards.
- **Paperwork required:** None
- **Method:**
 - Retrieve person's information on SPAIDEN or PPAIDEN.
 - Click on the Address tab
 - Select the address to be corrected.
 - Overtyping incorrect, non standard information.
 - Click Save.

3.1.2.3 Deleting/Inactivating Addresses

- **Overview:** When mail is returned or a person informs an office that their address is no longer valid that 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:** N/A
- **Method:**
 - Retrieve person's information on SPAIDEN or PPAIDEN.
 - Click on the Address tab
 - Select the address to be inactivated.
 - Check the **Inactive Address** box or enter the current date in the **To Date** box.
 - Click Save.

NOTES on Addresses:

- The UNM default 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.
- Enter Zip or Postal Code or select from the drop down box. If the 9 digit zip is known, input 5 digits, hyphen 4 digits (**example: NNNNN-NNNN**).
- TIP: Entering Street Lines and a Zip code and tabbing out of the zip code field will automatically fill in the City and State.
- TIP: Entering Street Lines, City and State and tabbing out of the state field will automatically fill in the Zip Code.
- TIP: Check the Override Address Verification check box when entering foreign address.
- County –The County field is being used for New Mexico counties only and will automatically populate with use of zip code

Figure 6 Telephone Tab

4. Telephone Tab

4.1.1 General Information

Encourage students and employees to change their telephone information using Demographic Self Service (DSS). The changes will automatically be updated in Banner. Telephone types from Demographic Self Service are MA Mailing, BI Billing (if different from MA), PE Permanent (primarily for Students), CA Campus for faculty, staff and CE Cell phones.

A Person or Non-Person may have multiple telephone numbers. The telephone number is in a three-field format and uses all ten digits. A telephone number can be entered without an address or can be associated with an address.

NOTE! Phone numbers entered in association with a NM address will be considered as NM phone numbers and the system will attempt to provide the correct area code – 505 or 575. If you have a phone number, such as a cell phone, that has an area code outside of NM you must enter it separately, on the Telephone Tab. Do not associate the telephone with an address. Use type CE for cell phones.

4.1.1.1 Telephone Types

A Telephone Type has been defined for each Address Type as well as one for a fax telephone number. Each Telephone number can be associated with one address or can stand by itself.

4.1.1.2 Banner General Person Telephone Types:

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
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. This phone numbers will be input into Banner by the Housing organization.
CA	Campus	Phone number associated with a staff or faculty office phone number.

4.1.1.3 International Phone Numbers

International phone numbers consist of three parts. Enter all three parts in the 16-character international phone number field, using no parentheses or hyphens. Do NOT enter the "011" standard code for international dialing.

- Example:
- 8137599311 would be entered for a telephone number in Japan consisting of 81 for the country code, 3 for the city code and 7599311 for the phone number.
- See the Data Entry Standards ([DES Appendix A](#)) for complete standards.

4.1.2 Procedures

4.1.2.1 Entering Phone Numbers

- **Overview:**
- **What office(s):** All updaters
- **Under what circumstances:**
- **Paperwork required:**
- **Method:**
 - Retrieve the person's information on SPAIDEN or PPAIDEN.
 - Click the Telephone Tab to make additions and updates to telephone numbers.
 - Telephone Type is a required field. Click on the drop down box and select.

- Enter the 10-digit telephone number (NO dashes). Enter the extension if available.
- Telephone numbers also can be associated with an address. To associate a phone number with an address, complete the Address Type and Sequence fields.

4.1.2.2 Updating Phone Numbers

- **Overview:**
- **What office(s):**
- **Under what circumstances:**
- **Paperwork required:**
- **Method:**
 -

4.1.2.3 Deleting/Inactivating Phone Numbers

- **Overview:**
- **What office(s):**
- **Under what circumstances:**
- **Paperwork required:**
- **Method:**
 - Retrieve the person's information on SPAIDEN or PPAIDEN.
 - Click the Telephone Tab to make additions and updates to telephone numbers.
 - Telephone Type is a required field. Click on the drop down box and select.
 - Enter the 10-digit telephone number (NO dashes). Enter the extension if available.
 - Telephone numbers also can be associated with an address. To associate a phone number with an address, enter the phone number on the Address tab along with the address.

Notes on Telephone Numbers

- Cell Phones: Enter all cell phones with the CE Telephone Type .
- If more than one telephone number is available, associate the primary phone number with the MA address. The additional numbers can be entered on the Telephone Tab and not associated with an address.
- A person can have more than one phone number of a given type. For example a staff member may have two CA Campus phone, a land line and a cell phone. Both would be entered as CA. The system will create a sequence number for each phone. Only one of the CA phones can be marked as Primary.

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
Deceased Date:
 Confidential
 Deceased

Citizenship: 1 Citizen or National of the US
Marital Status:
Religion:
Legacy:
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	User	Activity Date
4 White	JKGREEN	10-NOV-2010
51 Navajo Dine	JKGREEN	10-NOV-2010
<input type="text"/>	<input type="text"/>	<input type="text"/>

FRM-40400: Transaction complete: 1 records applied and saved.
Record: 1/1 | ... | <OSC>

Figure 7 Biographical Tab

5. Biographical Tab

5.1 Overview of Biographical Information:

- **Gender:** Required; click on the radio button to select gender code. Selections are: M, F, or Not Avail.
- **Birth Date:** Required. Type DDMMYYYY with NO punctuation. Banner accepts other formats. Use the tab key to auto fill the **AGE** field.
- **SSN/SIN/TIN:** Enter the number (no dashes).
- **Confidentiality:** Enable by clicking or disable by clicking.
- **Deceased.** Consult with supervisor to determine who may enter and what verification is required.
- **Citizenship:** Enter or click on the drop down box to select.
- **Marital Status:** Do not enter. Not used at this time.
- **Religion:** Do not enter. Not used at this time.
- **Legacy:** Do not enter. Not used at this time.
- **Ethnicity:** Enter or click on the drop down box to select. Click on Confirmed indicator.
- **Race:** Select all that are appropriate.
- **Veteran File Information:** Entered by Human Resources Payroll or the Veteran's Affairs Office.

5.2 Gender

5.2.1.1 General Information: The U.S. Department of Education requires the University to report gender information.

5.2.1.2 Procedures

5.2.1.3 Entering Gender

- **Overview:** Do not enter if not in your information.
- **What office(s):** All updaters
- **Under what circumstances:**
- **Paperwork required:** Updated state issued photo ID
- **Method:**
 - Click on the radio button to select gender code. Selections are: M, F, or Not Avail
 - Click save.

5.2.1.4 Updating Gender

- **Overview:** Enter if person supplies information
- **What office(s):** All updaters
- **Under what circumstances:**
- **Paperwork required:**
- **Method:**
 - Click on the radio button to select gender code. Selections are: M, F, or Not Avail
 - Click save.

5.2.1.5 Changing Gender

- **Overview:**
- **What office(s):**
- **Under what circumstances:**
- **Paperwork required:**
 - Picture ID, and
 - Court documentation, and
 - Medical documentation, and
 - Completion of Employee Demographic Form
- **Method:**
 - Click on the radio button to select gender code. Selections are: M, F, or Not Avail
 - Click save.

5.2.1.6 Deleting/Inactivating Gender

- **Overview:** Gender is not deleted.
- **What office(s):**
- **Under what circumstances:**
- **Paperwork required:**
- **Method:**

5.3 Date of Birth

5.3.1 General Information:

The Date of Birth is a key identifier and should be entered whenever possible.

5.3.2 Procedures

5.3.2.1 Entering DOB

- **Overview:** DOB is required for all employees and students and is a key identifier in the matching process. It is important that it is correct.
- **What office(s):** All updaters
- **Under what circumstances:** Upon entry of a new person or when the information becomes available.
- **Paperwork required:**
 - An Employee Demographic Form or Name, Address and Social Security Number Change Authorization Form
 - Application for Admission.
- **Method:**
 - Enter DOB in GOAMTCH as part of the matching criteria. Format is DD MM YYYY. The system will auto tab to each field.

5.3.2.2 Updating DOB

- **Overview:**
- **What office(s):** Registrar's, Payroll, the Office of International Programs and Studies (OIPS), Admissions, or Human Resources offices
- **Under what circumstances:**
- **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 identification documents:
 - 1) Driver's License or
 - 2) Temporary driver's license issued by the Motor Vehicle
 - 3) Passport
 - 4) Military ID
 - 5) Lobo Card
- **Method:**
 - After the required documents and forms have been received:
 - Retrieve the person's data on SPAIDEN or PPAIDEN.
 - On the Biographical tab over type the DOB.
 - Click Save.

5.3.2.3 Deleting DOB

- **Overview:**
- **What office(s): Duplicate Certifiers in:** Registrar's, Payroll, OIPS, Admissions, or Human Resources offices
- **Under what circumstances:** When a duplicate has been confirmed and the TO set has the wrong birth date.
- **Paperwork required:**
- **Method:**
 - After the duplicate has been confirmed and the correct DOB has been confirmed.
 - Retrieve the person's data On SPAIDEN or PPAIDEN.

- On the Biographical tab delete the DOB.
- Click Save.

5.4 Social Security Number / Tax Identification Number

5.4.1 General Information

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: To be added to the system, employees must provide an I-9 document (Federal Employment Eligibility Verification form) along with appropriate documentation of identity and work status. The last page of the I-9 form documents the acceptable identification documents: <http://www.immigration.gov/graphics/formsfee/forms/files/I-9.pdf>

Students: Student SSNs are added with the Social Security Number that is entered on their application for admission or their Social Security Number on their Application for Federal Student Aid (FAFSA).

5.4.2 Procedures:

5.4.2.1 Entering a SSN

- **Overview:**
- **What office(s):** Registrar's, Admissions, Human Resources, OIPS
- **Under what circumstances:** Upon entry of the person into Banner
- **Paperwork required:**
 - Employees. To be added to the system, employees must provide an I-9 document (federal Employment Eligibility Verification form) along with appropriate documentation of identity and work status. The last page of the I-9 form documents the acceptable identification documents: <http://www.immigration.gov/graphics/formsfee/forms/files/I-9.pdf>
 - Students are added with the Social Security Number that is entered on their application for admission or their Social Security Number on their Application for Federal Student Aid (FAFSA).
- **Method:**
 - Enter the SSN in GOAMTCH as part of the matching criteria.

5.4.2.2 Updating 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, OIPS, 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.
- **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 picture ID:
 - 1) Driver's License
 - 2) Passport
 - 3) Military ID
 - 4) Lobo ID
- **Methods:**
 - A. Entering a SSN on an existing person**
 - Retrieve the person's data on SPAIDEN or PPAIDEN
 - Click on the Biographical Tab
 - Enter the SSN

- Click Save

B. Changing an Incorrect SSN

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

If the correct SSN is not known:

- Retrieve the person's data on SPAIDEN or PPAIDEN
- Click on the Biographical Tab
- Enter UNM000 in the SSN box
- Click Save
- Click on a different tab so the Biographical tab can refresh.
- Click on the Biographical Tab again to see the new dummy 000 ssn.
- A SPACMNT entry will automatically be created using the 800 comment type code stating that it is a dummy ssn.

5.4.2.3 Deleting/Inactivating SSN

- **Overview:** SSNs are never deleted. If you have a special problem please contact gp@unm.edu. Do not include the SSN in the email. Do include the person's name and UNM Id.
- **What office(s):** None
- **Under what circumstances:** Never
- **Paperwork required:** N/A
- **Method:**

5.4.2.4 Duplicate SSN Error

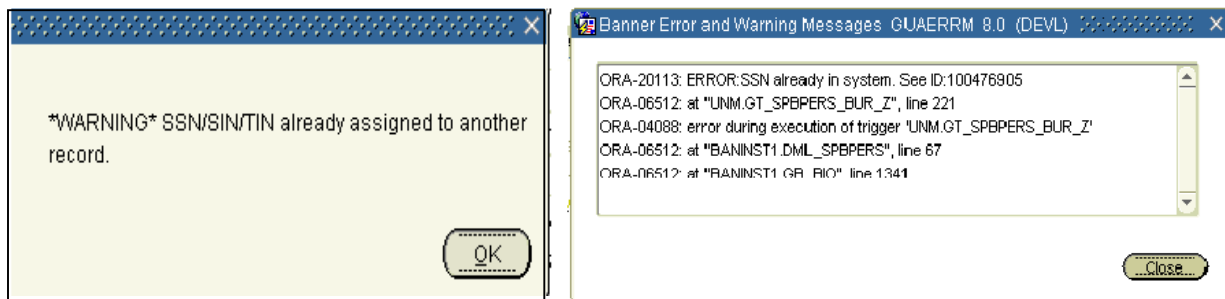


Figure 8: Duplicate SSN Error

- **Overview:** UNM does not allow a SSN to be entered into the system more than once.
 - Trying to do so will produce the warning *WARNING* SSN/SIN/TIN already assigned to another record.
 - If you received this warning, go ahead and click save.
 - The record will not be saved, but the system will then produce the Banner Error and Warning Message shown above.
 - The first line will show the ID and Name of the person to whom the SSN already belongs. Look to see if you have a duplicate.
 - Report all duplicates using the Dupbuster's web site.

5.5 Procedures: Tax Identification Number Entry and Changes

- **Overview:** Vendors are asked for their Tax Identification Number (TIN) and if their payments are reportable to the IRS under 1099 requirements, they are required to fill out a federal W-9 form certifying that the TIN they have submitted is correct. Since a TIN is required when payments are 1099-reportable, if the TIN is not on the payment document, Accounts Payable will enter blank as a temporary TIN until the W-9 is received from the vendor.
- **What office(s):** Purchasing

- **Under what circumstances:** When necessary.
- **Method:**
 - Retrieve the Vendor's information on FTMVEND.
 - Enter the number with no dashes.

5.5.1 Changes to the Tax Identification Number

The TIN is changed if a corrected W9 is submitted or when the TIN was incorrectly keyed from the original W9.

5.6 Confidentiality Indicator

5.6.1.1 General Information – pertains to students only.

Both federal and state laws permit The University of New Mexico to release to the public "directory" information regarding current and former students without the student's consent, unless a student asks that some or all of that information be withheld.

Directory information includes: student's name, current address, e-mail address, telephone number, date of birth, major field of study, full or part-time status, participation in officially recognized activities and sports, weight and height of athletic team members, dates of attendance, degrees and awards received and most recent previous educational institution attended by student.

A student's request for confidentiality is indicated by checking the confidentiality indicator box in Banner. Clicking the box indicates a student has filed a written request that UNM not release "directory" information. It is a student's option to choose confidentiality.

If the confidentiality indicator is set for a student NO information should be released about the student to anyone over the phone. Not even the acknowledgment that they are a student or are in the system in any way. Information may be released to Proxies (found on the SPACMNT form), and to the student in person if they provide a legal photo id.

5.6.2 Procedures

5.6.2.1 Setting Confidential indicator

- **Overview:** If students have questions about Confidentiality, please advise them if they elect this option NO information will be released by phone to anyone (including themselves) under any circumstances. All transactions must be done themselves either in person with a photo ID or by signed request
- **What office(s):** Registrar's, Admissions, OIPS
- **Under what circumstances:** When a student requests that it is set.
- **Paperwork required:**
 - A photo ID.
 - A Written request, signed by the person whose record is to be updated
- **Method:**
 - Retrieve the person's data on SPAIDEN or PPAIDEN
 - Click on the Biographical Tab.
 - Check the **Confidential** check box.
 - Click Save.

5.6.2.2 Releasing Confidential indicator

- **Overview:** The student must come into one of the updating offices in person to request that the Confidential Indicator be removed. The request may not be made over the phone.
- **What office(s):**
- **Under what circumstances:** When a student requests that it be removed.
- **Paperwork required:**
 - A photo ID.
 - A written request, signed by the person whose record is to be updated
- **Method:**
 - Retrieve the person's data on SPAIDEN or PPAIDEN
 - Un-Check the **Confidential** check box.

- Click Save.

Notes on Confidential indicator

- When a student has the confidentiality indicator set no information about the student may be released at all, not even indicating that they are in the system at all. Please refer to the [Confidentiality Response](#) on what to say to a person requesting information about a student with the indicator set.
- When the confidentiality indicator is released the student's directory information flags must also be reset.

5.7 Deceased Information

5.7.1 General Information

In Banner, a deceased person is identified when the deceased indicator is checked. Deceased flags and dates should only be entered upon receipt of a death certificate, obituary verification or other formal notification.

Deceased information is entered in order to avoid sending University communications to deceased persons, and to process benefit claims or final financial transactions.

5.7.2 Procedures

5.7.2.1 Entering Deceased indicator

- **Overview:**
- **What office(s):** Dean of Students, Registrar's, Human Resources (Benefits office).
- **Under what circumstances:** Deceased flags and dates should only be entered upon receipt of a death certificate, obituary verification or other formal notification.
- **Paperwork required:**
 - death certificate,
 - obituary verification or
 - other formal notification
- **Method:**
 - Retrieve the person's data on SPAIDEN or PPAIDEN
 - Click on the Biographical Tab.
 - Check the **Deceased** check box.
 - Enter the date of death if known. Current date if it is not known.
 - Click Save.

5.7.2.2 Updating Deceased indicator

- **Overview:** The deceased indicator typically would not be updated, but the date of death could be.
- **What office(s):** Registrar's, Admissions, Human Resources
- **Under what circumstances:** The date of death may be updated or corrected if the actual date is learned.
- **Paperwork required:**
 - death certificate,
 - obituary verification or
 - other formal notification
- **Method:**
 - Retrieve the person's data on SPAIDEN or PPAIDEN
 - Click on the Biographical Tab.
 - Overtyping the date of death.
 - Click Save.

5.7.2.3 Deleting/Inactivating Deceased indicator

- **Overview:** The deceased indicator may be deleted if it has been set erroneously.
- **What office(s):** Registrar's, Admissions, Human Resources
- **Under what circumstances:** When it is learned that the indicator had been set erroneously.
- **Paperwork required:** If the person in question is requesting the removal a picture id.
- **Method:**

- Retrieve the person's data on SPAIDEN or PPAIDEN
- Click on the Biographical Tab.
- Uncheck the deceased indicator by clicking on it.
- Blank out the date of death.
- Click Save

5.8 Citizenship

5.8.1 General Information

Citizenship is required for employees, foreign student and scholars, students receiving financial aid and for any person receiving financial reimbursement from the University.

5.8.2 Procedures

5.8.2.1 Entering Citizenship

- **Overview:** Citizenship is
- **What office(s):** Registrar's, Admissions, Human Resources, Payroll, OIPS
- **Under what circumstances:**
- **Paperwork required:**
 - Employees. To be added to the system, employees must provide an I-9 document (federal Employment Eligibility Verification form) along with appropriate documentation of identity and work status. The last page of the I-9 form documents the acceptable identification documents: <https://hr.unm.edu/docs/employment/i-9-employment-eligibility-verification.pdf>. Students are added with the citizenship code that is entered on their application for admission or on their Application for Federal Student Aid (FAFSA).
 - If the person is an undocumented foreign national (no visa, etc.) choose code 5.
- **Method:**
 - Retrieve the person's data on SPAIDEN or PPAIDEN
 - Click on the Biographical Tab.
 - Select the correct citizenship code from the drop down
 - Click Save

5.8.2.2 Updating Citizenship

- **Overview:** Citizenship code is required for employees and foreign student and scholars. Every time a citizen code is changed an audit trail record is written to an audit table.
- **What office(s):**
 - Changes in Citizenship for students should be performed by OIPS for current students or International Admissions for incoming students.
 - Changes in Citizenship for employees (non-students) should be performed by Payroll.
 - The change to the code 3R is made automatically by software used by Payroll and should never be manually updated.
- **Under what circumstances:** Changes to Citizenship may be made when the appropriate documents are delivered to Payroll, OIPS, Admissions or Registration.
- **Paperwork required:** Requirements for changes in Citizenship are different depending on the change that is being requested and the relationship that person has with UNM.
 - If the change results in code 1 being populated, naturalization papers must be presented.
 - If the change results in code 2 being populated, the green card, I-551 stamp or visa indicating approval for permanent residency must be presented
 - If the person is an undocumented foreign national (no visa, etc.) choose code 5.
- **Method:**
 - Retrieve the person's information on SPAIDEN or PPAIDEN.
 - Overtyping the old Citizenship code or click on the drop down box to select Citizenship from the table of valid values.
 - Click Save.
 - Add a comment to the General Person Comment Form (SPACMNT) to note change and documentation used concerning citizenship status.

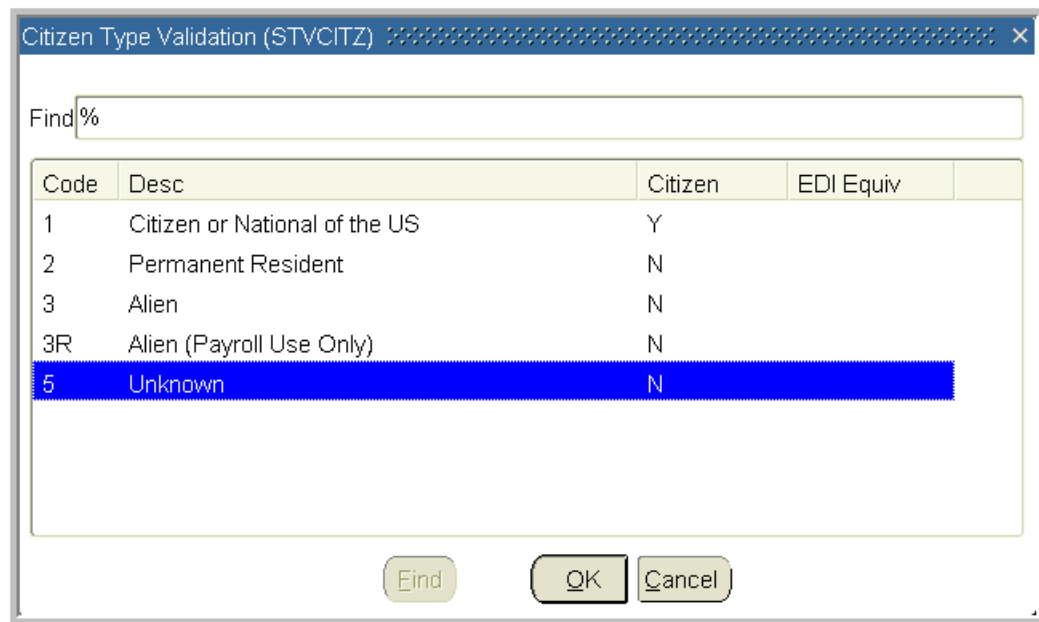


Figure 8 Citizenship Codes

5.8.2.3 Deleting/Inactivating Citizenship

- **Overview:** Deleting an existing Citizenship code is not allowed.
- **What office(s):** None
- **Under what circumstances:** Never
- **Paperwork required:** N/A

5.9 Marital Status

****Do not enter marital status - UNM does not capture marital status.**

5.10 Religion Code

****Do not enter Religion Code – UNM does not capture religion.**

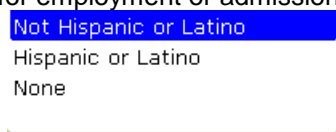
5.11 Legacy

****Do not enter Legacy Code - UNM does not capture Legacy status.**

5.12 New Ethnicity Code

5.12.1 General Information

The Ethnicity Code is required in Banner General Person for Employees. The code is selected from a menu that includes federally mandated codes. New Ethnicity Codes are used for reporting ethnicity and race data for students and employees as required by federal and state laws. It is based on the individual's self-identification on the application for employment or admission.



5.12.2 Procedures

5.12.2.1 Entering New Ethnicity Code

- **Overview:** The new ethnicity code values are 'Not Hispanic or Latino', 'Hispanic or Latino' and 'None'.
- **What office(s):** All updaters.
- **Under what circumstances:**
- **Paperwork required:** Application for Admission or Application for Employment.
- **Method:**
 - On the Biographical tab of SPAIDEN or PPAIDEN.
 - Click on the drop down box to select New Ethnicity from the table of valid values.
 - Click Save.
 - The Ethnicity and Race Confirmed check box and Confirmed Date will automatically populate.

5.12.2.2 Updating New Ethnicity Code

- **Overview:**
- **What office(s):** All updaters.
- **Under what circumstances:** If new information becomes available.
- **Paperwork required:** Application for Admission or Application for Employment or personal request.
- **Method:**
 - Retrieve the person's information on SPAIDEN or PPAIDEN.
 - On the Biographical tab, click on the drop down box to select New Ethnicity from the table of valid values.
 - Click Save.

5.12.2.3 Deleting/Inactivating Ethnicity Code

- **Overview:**
- **What office(s):**
- **Under what circumstances:**
- **Paperwork required:**
- **Method:**

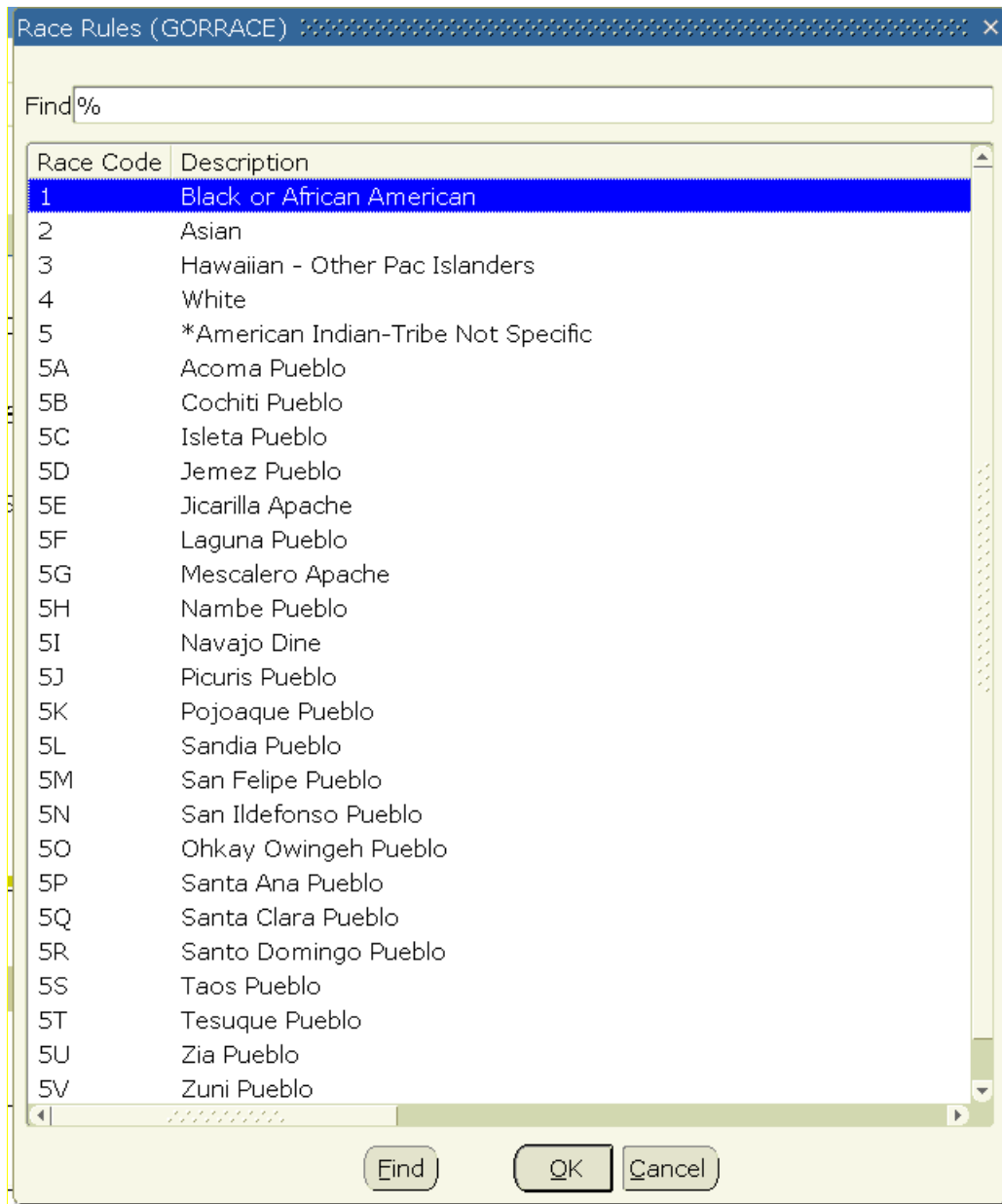


Figure 9 Race Codes

5.13 Race Code

5.13.1 General Information

The Race Codes are used for reporting ethnicity and race data for students and employees as required by federal and state laws. It is based on the individual's self-identification on the application for employment or admission.

5.13.2 Procedures

5.13.2.1 Entering Race Code

- **Overview:** A person may select as many Races as they want.
- **What office(s):** All updaters.
- **Under what circumstances:** Application for Admission or Application for Employment
- **Paperwork required:** Application for Admission or Application for Employment.
- **Method:**
 - Retrieve the person's information on SPAIDEN or PPAIDEN.

- On the Biographical tab, click on next block to the Race block. Click the drop down box to select Race code(s) from the table of valid values.
- If more than three races are selected, click on Record and Insert from the main menu to add additional rows.
- Click Save.

5.13.2.2 Updating Race Code

- **Overview:** A person may select as many Races as apply to them.
- **What office(s):** All updaters.
- **Under what circumstances:** Application for Admission or Application for Employment
- **Paperwork required:** Application for Admission or Application for Employment.
- **Method:**
 - Retrieve the person's information on SPAIDEN or PPAIDEN.
 - On the Biographical tab, click on next block to get down to the Race block. Click the drop down box to select Race code(s) from the table of valid values.
 - If more than three races are selected, click on Record and Insert from the main menu to add additional rows.
 - Click Save.

5.14 Veteran Information

5.14.1 General Information

This General Person field is to identify a veteran status for an employee. There are separate Banner Student forms where veteran information is collected for those attending UNM and receiving veteran education benefits.

5.14.2 Procedures

5.14.2.1 Entering Veteran information

- **Overview:**
- **What office(s):**
- **Under what circumstances:**
- **Paperwork required:**
- **Method:**
 -

5.14.2.2 Updating Veteran information

- **Overview:**
- **What office(s):**
- **Under what circumstances:**
- **Paperwork required:**
- **Method:**
 -

5.14.2.3 Deleting/Inactivating Veteran information

- **Overview:**
- **What office(s):**
- **Under what circumstances:**
- **Paperwork required:**
- **Method:**

6. E-mail Addresses Tab

6.1 General Information

Students, faculty, staff and retirees at the University of New Mexico are eligible to retain their UNM Netids, allowing them Internet access, e-mail services, and UNIX system access.

Establishing an account with UNM IT and selecting a Netid will automatically create @unm.edu e-mail address.

The @unm.edu email address is automatically added to their Banner record with e-mail type "UNM" and is usually, but not always, checked as the "Preferred" e-mail to use.

Some staff or faculty may have additional @unm.edu e-mail addresses such as bbcoach@unm.edu or unmprez@unm.edu. These additional @unm.edu e-mail addresses are entered as type ALTN.

Demographic Self Service (DSS) allows each person to enter a non@unm.edu e-mail address as preferred. This e-mail address is displayed in the UNM Online Directory. If a preferred e-mail is not entered, the @unm.edu e-mail will be displayed, if available. If the e-mail address has @salud.unm.edu, or @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.edu e-mail.

6.2 Procedures

6.2.1 Entering E-mail Addresses

- **Overview:** Normally UNM email addresses are never entered for a person. ALTN email addresses may be entered.
- **What office(s):** All updaters.
- **Under what circumstances:** When an ALTN email address is presented.
- **Paperwork required:** Application for Admission, Application for Employment
- **Method:**
 - Enter the ALTN email address on GOAMTCH when entering the person for the first time.
 - Enter the ALTN email address on the Email Tab on any *IDEN form.
 - Enter or Select ALTN in the E-mail Type box
 - Enter the email address in the case presented.

6.2.2 Updating Email Addresses

- **Overview:**
- **What office(s):** All updaters.
- **Under what circumstances:**
- **Paperwork required:**
- **Method:**
 - Retrieve the person's data on SPAIDEN or PPAIDEN
 - Click on the E-mail Tab.
 - Enter or select ALTN in the E-mail Type box
 - Enter the e-mail address in the E-mail Address box.
 - Click the Preferred indicator if the person has indicated this is their preferred email address.
 - Un-check any other Preferred indicators if the statement above is true.
 - Click Save.

6.2.3 Deleting/Inactivating Email Addresses

- **Overview:** To assure the most reliable communications between the University and people inactive or incorrect e-mail addresses should be cleaned up whenever possible. UNM email addresses are automatically inactivated when a student or employee terminates their association with the University. They should never be manually inactivated.
- **What office(s):** All updaters.
- **Under what circumstances:** When an e-mail address is proved to be incorrect or inactive. (Usually by returned e-mail)
- **Paperwork required:** Returned e-mail.
- **Method:**
 - Retrieve the person's data on SPAIDEN or PPAIDEN
 - Click on the E-mail Tab.
 - Click the Inactive indicator.

- If the e-mail address being inactivated was the preferred and there is another e-mail address click on the preferred indicator of 1) an active @unm.edu address or 2) another active ALTN address.
- Click Save

Figure 10 Email Tab

6.2.4 Data Entry Standards

All e-mail addresses entered should be evaluated for case sensitivity and spelling and appropriate e-mail address type

- E-Mail Address Types:

ALTN	Alternate	Any email other than @unm.edu including @salud.unm.edu
UNM	UNM	@unm.edu email addresses

E-mail Type “UNM” is strictly for addresses in the following precise format: netid@unm.edu and is entered automatically by the system upon the issuance of a netid.

The Preferred check boxes may be checked on one email address only.

NOTE:

- A comment is not required or desired on this screen.
- Offensive e-mail addresses may be refused.

General Person Identification SPAIDEN 8.2 (BANTR)

ID: 101580534 Test, General P. Generate ID: [Icon]

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

Priority: 1

Relationship: F Father

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

Last Name: Test
First Name: General
Middle Name: Person

Address Type: MA Mailing

Street Line 1: 2415 General Marshall St NE
Street Line 2:
Street Line 3:
Foreign Province:
City: Albuquerque
US State: NM New Mexico
ZIP or Postal Code: 87112-1147
Foreign Nation:

Telephone
Area Code: 505 Phone Number: 555-1234 Extension:
 Override Address Verification

Last Update
User: JKGREEN
Activity Date: 14-OCT-2011

Figure 11 Emergency Contact Tab

7. Emergency Contact Tab

7.1 General Information

Students and Employee's can make changes to their Emergency Contacts through Self Service. Student in Student Housing are required to enter an Emergency Contact.

7.2 Procedures

7.2.1.1 Entering Emergency Contact Information

- **Overview:**
- **What office(s):**
- **Under what circumstances:**
- **Paperwork required:** None
- **Method:**
 - Retrieve person's information on SPAIDEN or PPAIDEN.
 - Select Priority (1 through 9).
 - Select Relationship.
 - Enter Name.
 - Enter Address (Address will auto-populate from the person's address if the same address type code is entered).
 - Enter Telephone Number.
 - Select Record | Insert to add additional emergency contacts.
 - Click save after each entry.

7.2.1.2 Updating Emergency Contact Information

- **Overview:** Emergency Contact information may be updated by overtyping the old information.
- **What office(s):** Registrars, EDCs.
- **Under what circumstances:** As needed.
- **Paperwork required:** None

- **Method:**
 - Retrieve person’s information on SPAIDEN or PPAIDEN.
 - Overtyping the information that has changed.
 - Click on save

7.2.1.3 Deleting/Inactivating Emergency Contact Information

- **Overview:**
- **What office(s):**
- **Under what circumstances:**
- **Paperwork required:**
- **Method:**
 - Retrieve person’s information on SPAIDEN or PPAIDEN.
 - Select Record | Remove from main menu.
 - Click on save.

7.3 Data Entry Standards

- Must select the Priority
- Must select the Relationship from drop down list of values.
- Must enter a Name and a Telephone Number.
- Address is optional.

General Person Identification SPAIDEN 8.2 (BANP)

ID: 100010201 Green, Jane K. Generate ID:

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

ID Type	Description	Additional Identification	Activity Date	User
LC	Learner ID (Learning Central)	29788	18-APR-2012	GENERALAPPWORX
NTID	UNM NetID	jkgreen	18-APR-2012	GENERALAPPWORX
PIDM	Person's base id	10201	18-APR-2012	GENERALAPPWORX

Additional ID Type; LIST for available types.

Figure 12: Additional ID Tab

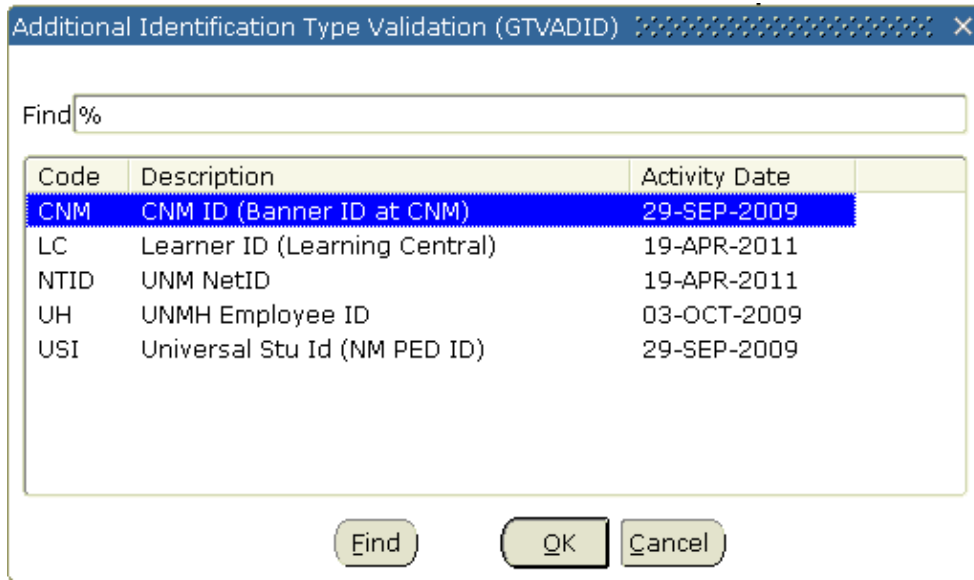


Figure 13: Additional ID Types

8. Additional ID Tab

8.1 General Information

The Additional ID Tab stores IDs that are not Banner specific. Netid (NTID), University Hospital (UH), Universal Student ID (USI), CNM Banner ID (CNM) and Learning Central ID (LC) are available on this tab (if they exist for the person you are viewing).

The IDs are stored on this tab by the system and generally are not entered by staff.

8.2 Procedures

8.2.1.1 Entering Additional IDs

- **Overview:** The additional ids are entered by the system with the exception of the USI.
- **What office(s):** Enrollment Management
- **Under what circumstances:** Upon receipt of a USI.
- **Paperwork required:** Application or other student document
- **Method:**
 - Retrieve person's information on SPAIDEN or PPAIDEN.
 - Click on Additional ID Tab.
 - Select ID Type from the drop down.
 - Enter the ID.
 - Click save.

8.2.1.2 Updating Additional IDs

- **Overview:** Some ids become inactive, such as netids and UH ids. The system will update inactive ids with the 'Inactive' indicator.
- **What office(s):** None
- **Under what circumstances:** When the id becomes inactive.
- **Paperwork required:** None

8.2.1.3 Using Additional IDs to Search for a Person

- **Overview:** Additional IDs maybe used to search for a person using the GUISEARCH form.
- **Method:**

- Type GUISRCH in the Go To box on the Main Menu Form.
- Enter the Additional ID in the Additional ID box or
- Enter the email address in the E-mail box or
- Enter the phone number in the Phone Number box.
- Wild cards may be used in the searches (%).
- Click on Next Block.

The screenshot shows a window titled "General Search GUISRCH 8.4 (DEVL)". At the top, there are five input fields labeled "Additional ID", "E-mail", "Country Code", "Area Code", and "Phone Number". Below these fields is the instruction: "Enter one search criteria (Alternate Id,E-Mail,Telephone) and press Next Block to list matching records".

Below the instruction is a table with the following columns: "ID", "First Name", "Middle Name", "Last Name", and "Birth Date". The table contains 12 rows of empty input fields for each column, indicating that no search results have been displayed yet. A vertical scrollbar is visible on the right side of the table.

Figure 14: GUISRCH

Figure 15: SPACMNT

9. SPACMNT

9.1 General Information

SPACMNT is the form used to enter general comments about a person.

The form is available by typing the name in the GO TO box on the main menu or from the Options menu from each of the **IDEN forms.

This form should be used for noting changes to any demographic or other general person data that may be useful for other people to know about an individual.

NOTE: These comments are public records and can be subpoenaed.

- Keep comments professional
- Do not make personal comments.
- 800 comment type is used to denote dummy ssns automatically when they are created.

9.2 Procedures

- **What office(s):** See tables below.
- **Under what circumstances:** When events happen to a person's data that should be noted.
 - SSN verification or change
 - Name change
 - International Student or Scholar information
 - International person's status or pending change of status
 - Office location of I9 or other documentation
 - Death notification
 - Any other demographic information
- **Paperwork required:** see tables below.
- **Method:**
- **A: From an **IDEN form:**
 - Retrieve the person's data on SPAIDEN or PPAIDEN
 - Click Options from the Main Menu
 - Select General Person Comment Form [SPACMNT]

- Select Record / Insert from the Main Menu.
- Select or Enter 999 as Comment Type for Deceased Information comment.
- Select or Enter 100 as Comment Type for all other comments.
- Leave other fields blank or with default information.
- Enter comments beginning with a descriptor:
 - SSN Verification...
 - Name Change...
 - Citizen Code ...
- Former Name...
- Enter the date
- Enter your name or userid
- Enter details
- Click Save
- **B: From the General Menu Form:**
 - Type SPACMNT into the GO TO box.
 - Enter the UNM Id of the person
 - Proceed as detailed above.

9.2.1 Student:

NOTE:

- Only the Registrar's office can make changes to; confidentiality, deceased, gender and name.
- For International Students OIPS can make updates to all demographic data.

Type	Office	Documentation
Citizen Code Change	Admissions, Registrar	Permanent Resident card, Naturalization Certificate
Confidentiality Change	Registrar	Direct the Applicant/Student to the Registrar's office
Deceased	Dean of Students	Direct the person with death certificate to the Dean of Students' office
Deceased Follow-up	Registrar	Record and registration tasks associated with the death of a student
Gender Change	Registrar	Updated state issued Picture ID
Name Change	Registrar	Social Security Card + Picture ID, Name/SSN Change Form
Race/Ethnicity Change	Admissions, Registrar	Application
SSN Correction	Admissions, Registrar	Social Security Card + Picture ID, Name/SSN Change Form
SSN Verification	Admissions, Registrar	Social Security Card + Picture ID, Name/SSN Change Form
FERPA Proxy Notation	Registrar	Picture ID or notarized signature (if not submitted in person)

9.2.2 Staff – Main Campus:

Type	Office	Documentation
Citizen Code Change	EDC*	Permanent Resident card, Naturalization Certificate
Deceased	Payroll, Benefits	Direct the person with death certificate to Benefits
Gender Change	EDC, Payroll	Social Security Card, Picture ID, Demo Change Form, I9
Name Change	EDC, Payroll	Social Security Card, Picture ID, Demo Change Form, I9
Race/Ethnicity Change	EDC, Payroll	Direct the employee their EDC or Payroll
SSN Correction	EDC, Payroll	Social Security Card, Picture ID, Demo Change Form, I9
SSN Verification	EDC, Payroll	Social Security Card, Picture ID, Demo Change Form, I9

9.2.3 Faculty – Main Campus:

Type	Office	Documentation
Citizen Code Change	Faculty Contracts	Permanent Resident card, Naturalization Certificate
Deceased	Faculty Contracts	Direct the person with death certificate to Faculty Contracts
Gender Change	Faculty Contracts	Direct the faculty member to Faculty Contracts
Name Change	Faculty Contracts	Direct the faculty member to Faculty Contracts
Race/Ethnicity Change	Faculty Contracts	Direct the faculty member to Faculty Contracts
SSN Correction	Faculty Contracts	Social Security Card, Picture ID, Demo Change Form, I9
SSN Verification	Faculty Contracts	Social Security Card, Picture ID, Demo Change Form, I9

9.2.4 Staff – HSC:

Type	Office	Documentation
Citizen Code Change	EDC, Payroll	Permanent Resident card, Naturalization Certificate
Deceased	Payroll, Benefits	Direct the person with death certificate to Benefits
Gender Change	EDC, Payroll	Direct the employee their EDC or Payroll
Name Change	EDC, Payroll	Social Security Card, Picture ID, Demo Change Form, I9
Race/Ethnicity Change	EDC, Payroll	Direct the employee their EDC or Payroll
SSN Correction	EDC, Payroll	Social Security Card, Picture ID, Demo Change Form, I9
SSN Verification	EDC, Payroll	Social Security Card, Picture ID, Demo Change Form, I9

9.2.5 Faculty – HSC:

Type	Office	Documentation
Citizen Code Change	HSC Faculty Contracts	Permanent Resident card, Naturalization Certificate
Deceased	HSC Faculty Contracts	Direct the person with death certificate to HSC Faculty Contracts
Gender Change	HSC Faculty Contracts	Direct the faculty member to HSC Faculty Contracts
Name Change	HSC Faculty Contracts	Direct the faculty member to HSC Faculty Contracts
Race/Ethnicity Change	HSC Faculty Contracts	Direct the faculty member to HSC Faculty Contracts
SSN Correction	HSC Faculty Contracts	Social Security Card, Picture ID, Demo Change Form, I9
SSN Verification	HSC Faculty Contracts	Social Security Card, Picture ID, Demo Change Form, I9

9.2.6 Sample Comments:

Change Made	Comment Type	Sample Comment
Citizen Code	100	Citizen Code Change: Received Naturalization Certificate. Amd 02-11-1998
Confidentiality	100	Confidentiality Indicator set: Counseled student-stalking victim AREBER 11/11/2011
Deceased	100	Deceased Indicator set – spouse provided death certificate. SDEMO 12/12/1988
Gender	100	
Name	100	Name Change: Name Change form, SSN and driver’s license presented. Jkg 04/12/2008
Race/Ethnicity	100	Found on the ASM MBA admission application.
SSN Correction	100	SSN Correction: Received copy of SSN card and Driver’s License. Applicant indicated original application was completed in error. AMG 5may11”
SSN Verification	100	Reviewed copy of original SSN card and Driver’s License.
FERPA Proxy Addition	100	Student submitted FERPA Proxy form permitting [name] ([relationship]) and [name] ([relationship]) access to the information held by the following offices: Registrar, Dean of Students, Bursar, Housing, Admissions, Academic Advising, CAPS, Financial Aid (aid file status, aid awards, all documents in file, other [specify]). Valid from: [mm/dd/yyyy] Valid for Academic Year: [xx]-[xx]
Citizen Code	100	Citizen ship/permanent residence applied for/granted on mm/dd/yyyy

9.2.6.1 Employment Data Centers *:

- The Employment Data Centers or EDCs are the offices responsible for oversight and processing of employment transactions for types of employees.

The Employment Data Centers include:

- HR Staff
- SOM
- Academic Affairs
- Faculty Contracts and Services Office
- Student Employment

- Graduate Medical Education
- Office of Graduate Studies
- Continuing Education

10. Documents Required to Change General Person Information

If information in Banner must be changed as a result of keying errors, that information can be corrected from a review of the original source document that was incorrectly keyed. If the information to be corrected is not a keying error, documentation is required.

Many changes require completion of an Employee Demographic Form or Name, Address and Social Security Number Change Authorization Form which are available online from the HR home page or in paper form in the Registrar's Office, Admissions Office, Payroll Office or Office of International Programs (OIPS).

10.1 UNM ID Change

Normally a UNM ID should never be changed. Occasionally a bad id is created (the person's birth date or a form name)

Should the need arise for an ID change email the request to gp@unm.edu.

A new id will be created for the person.

10.2 Social Security Number (SSN) Change

Requires:

- Completion of Employee Demographic Form or Name, Address and Social Security number Change Authorization Form
- Social Security Card
- Plus a photo ID from this list:
 - Driver's License
 - Passport
 - Military ID
 - Lobo ID

10.3 Name Change

Requires:

- Completion of Employee Demographic Form or Name, Address and Social Security number Change Authorization Form
- Social Security Card with the new name
- Plus an item from this list:
 - Driver's License
 - Passport
 - Military ID
 - Lobo ID

In addition to the items above, an employee must complete a new I-9, Employment Eligibility Verification.

If a Continuing Education Student or Affiliate was entered into Banner without an SSN, their names can be changed without a Social Security Card.

International Students and International Scholars may or may not have an SSN in Banner. Their names should only be changed based upon passport information if no SSN is in Banner.

In all cases if an SSN is in Banner, a new Social Security Card must be presented to change a name.

SSN and Name Changes are performed in the Registrar's Office, Admissions Office and Payroll. The supporting documents for the changes above are copied and filed in the office that performed the change. The supporting documents are faxed to other offices as required. Remember many people are both Students and Employees at UNM.

Banner does not allow two previous names to be the same. When a person changes their name causing this situation it has been decided to eliminate the oldest alternate name by clicking on Record Remove.

10.4 Address Change

Encourage everyone to update their address in Demographic Self Service.

An office performing an address change requires either:

1. A valid picture ID, and Completion of “Employee Demographic Form” or “Name, Address and Social Security number Change Authorization Form”.

Or

2. Notification from the post office that an address has been changed.

If USPS (United States Postal Service) has sent information that an address is undeliverable, update the source code on the address record to indicate such.

10.5 Other Demographic Changes

Date of Birth Requires:

- Completion of Employee Demographic Form and
- Picture ID, and
- A birth certificate or driver’s license (For international students or scholars, a passport)

Ethnicity Change Requires:

- Completion of Employee Demographic Form, or submission of a new Student Admissions Form and
- Picture ID

Gender Change Requires:

- Completion of Employee Demographic Form
- Picture ID, and
- Court documentation, and
- Medical documentation

Citizenship Change: Requirements for changes in Citizenship are different depending on the change that is being requested and the relationship that person has with UNM.

Changes in Citizenship for students should be presented to the Office of International Programs and Studies (OIPS) for current students or International Admissions for incoming students.

Changes in Citizenship for employees (non-students) should be presented to Payroll and will be updated in legacy systems until the HR/Payroll conversion to Banner.

If the change results in code 1 being populated, naturalization papers must be presented.

If the change results in code 2 being populated, the green card, I-551 stamp or visa indicating approval for permanent residency must be presented.

Deceased Indicator/Date: The deceased indicator is checked when a Published Obituary or a copy of a Death Certificate is received. The date would be the date indicated on the document received. Searches of published obituaries are generally not conducted. The deceased indicator is usually set by the Dean of Students for students and by the Benefits office for employees.

Confidentiality Change Requires written notification, signed by the person whose record is to be updated and is set by the Registrar’s office.

Telephone Number Change

If more than one telephone number is available, associate the primary phone number with the MA address. If additional phone numbers are given, the additional number would be entered on Telephone Tab of an **IDEN form and not associated with an address.

11. Valid Sources of General Person Information

Overview: the following are the only valid sources of General Person information. Entry and update of General Person data is allowed only from the following:

Form	Data Element								
	Name	Address	Phone	Email	DOB	SSN	Ethnicity	Gender	Veteran
Admissions application – paper	Y	Y	Y	Y	Y	Y	Y	Y	Y
Admissions application – online	Y	Y	Y	Y	Y	Y	Y	Y	Y
Recruitment card	Y	Y	Y	Y	Y	N	N	Y	N
Recruitment – online	Y	Y	Y	Y	Y	N	N	Y	N
Employment application	Y	Y	Y	Y	Y	Y	Y	Y	Y
Employee Demographic Form	Y	Y	Y	Y	Y	Y	Y	Y	Y
Change Name/SSN/DOB form	Y	N	N	N	Y	Y	N	N	N
FAFSA	Y	Y	Y	Y	Y	Y	N	Y	N
Tape loads(SAT,ACT,GRE,etc.)	Y	Y	Y	Y	Y	Y	N	Y	N
Epafs	Y	Y	Y	Y	Y	Y	Y	Y	Y

12. 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