

University of California, Merced

Data Standards Document

LYNX



REVISION CONTROL

Date	By	Action	Pages
2/23/2010	Data Standards Team	Initial version completed in DRAFT.	All
2/25/2010	Data Standards Team	Final Additions from University Relations	Appendix
5/30/11	Address Engine Team	Updated Banner use descriptions	Appendix

Review/Approval History

Date	By	Action	Pages
8/24/11	Administrative Information Technology Council (AITC)	AITC adopted standards outlined in the Data Standards Document and confirmed purpose as a "living" document that will undergo revisions as needed; no further adoption consideration needed.	Entire document

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Chapter 1: Policies and Definitions

Data Standards Establishment and Maintenance

A Student/Alumni /Parent Contact committee has been established to develop standards for data that are shared across the various computer systems used by UC Merced. During the establishment process, this committee will serve to administer standards for the collection and maintenance of shared data.

In the initial development phase of this document, focus has been placed on Student/Alumni /Parent Contact information. Future phases will follow based on campus business needs.

Committee Mission

In consultation with representatives of four work groups, the Student/Alumni/Parent Contact committee will develop, document, and maintain data standards for Student/Alumni/Parent contact. Responsibilities include determination of data stewardship, definition of data maintenance standards/conventions, maintenance of tables of valid values, and formulation of measures to ensure the accuracy, validity, and completeness of shared institutional data.

Deficiencies Identified

The Student/Alumni/Parent Contact committee has identified several deficiencies in our current operational processes:

- Multiple systems of record with different management practices
- No mandate to integrate systems of records

Current Data Standards Document Work Group Representation

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Rules and Procedures

All decisions made by this committee require consensus. If consensus cannot be reached, the issue will be submitted to the large Group Coordinating Committee for further consideration. The Data Standards Group will convene/consult on an as-needed basis.

Requests for Modifications to the Data Standards

Requests for modifications to standards/values for shared data are submitted to the Data Standards Group.

Initial action may be a final decision, a request for additional information, or a report that the request has been submitted for higher and/or wider consideration.

Person Role Definitions and Assignments

Definition of Person Roles

Academic Initiative = Bridge, ES190

Alumnus = A person who has been awarded a UC Merced undergraduate degree or has completed at least 24 units.

Contract Worker/Affiliate = A person eligible for certain employee privileges via employment by a contracted service provider.

Donor = A person or business who is a financial contributor to the university or is a prospective financial contributor.

Employee = A person on payroll.

Employment Applicant = A person who has submitted an application to become an employee.

International = A student or applicant who has an F1 or J1 visa or an employee who has an H1 visa.

Legal Guardian = Parent or legal guardian of student or alumnus.

Research Sponsor = A non-person entity that provides funding based on a formal agreement for research and other special projects conducted by university faculty and staff.

Student = A person actively enrolled in a university-sponsored class or course of study, or a prior student who is not an alumnus.

Student Employee = A person whose employment requires that he/she first be an active student.

Student Applicant = A person who has submitted an application to become a student, or a prospective student applicant.

Vendor = A business or a person who is paid for goods or services the university has received.

Parent/Family/Sponsor = The parent, guardian or sponsor of a student.

General Update and Stewards Matrix

	Name	Legal Name	SSN	Biographic	International	Veteran	Campus Residence Address and Phone	Mailing/Perm Addresses	Phone	Email	Emergency Contact
Employee	HR	HR	HR	HR	HR	HR	MSO	HR	HR	IT	HR
Faculty	AP	AP	AP	AP	AP	AP	MSO	AP	AP	IT	AP
Student Employee	REG HR	REG HR	REG HR	REG HR	REG HR OIA	REG HR	RL MSO	REG HR	REG HR	IT	REG HR
Student and not an employee	REG	REG	REG	REG	REG OIA	REG	RL	REG	REG	IT REG	REG
Student Applicant	ADM	ADM	ADM	ADM	ADM OIA	ADM	NA	ADM	ADM	AD M	ADM
Employee Applicant	HR	HR	NA	HR	HR	HR	NA	HR	HR	HR	NA
Alumnus not employee or grad student	AS	AS	NA	AS	AS	AS	NA	AS	AS	AS IT REG	AS
Alumnus and employee	HR AS	HR AS	HR AS	HR AS	HR AS	HR AS	MSO AS	HR AS	HR AS	HR AS	HR AS
Alumnus and grad student	REG AS	REG AS	REG AS	REG AS	REG AS	REG AS	RL AS	REG AS	REG AS	REG AS IT	REG AS
Research Sponsor	SPO	SPO	SPO	SPO	SPO	SPO	NA	SPO	SPO	SPO	SPO
Contract/Affiliate	IT DEPT	IT DEPT	NA	NA	NA	NA	MSO	MSO	MSO	MSO	MSO
Vendor											
Donor	AS	AS	AS	AS	AS	AS	NA	AS	AS	AS	AS
Parent/Family/Sponsor	REG AS	REG AS	NA		REG AS	NA	NA	REG AS	REG AS	REG AS	NA

Maintenance Responsibility Table Key

- ADM = Admissions
- AP = Academic Planning
- AS = Advancement Services
- Dept = Department of Record
- HR = Human Resources
- IT = Information Technology
- MSO = Management Services Officer for Department of Record
- OIA = Office of International Affairs
- SPO = Sponsored Projects Office
- REG = Registrar
- RL = Residential Life

Data vs. System Inventory Matrix

System of Record	Affiliations							Emergency Contact
	Affiliate	Alumni	Applicants	Faculty	Staff	Student	Parent	
SIS/Banner	X	X	X	X	X	X	X	X
fsaAtlas						X		
Housing/StarRez						X	X	X
Cat Card	X	X		X	X	X		
Library	X	X		X	X	X		
Health (PnC)						X	X	X
PPS				X	X	X		X
Recreation	X	X		X	X	X		X
ePay							X	
Raiser's Edge	X	X		X	X	X	X	
Research Administration				X	X			
Identity Management	X	X		X	X	X		X
Financial				X	X	X		
SLR			X			X		
PAC						X	X	
Data Stores								
Identity Management	X	X	X	X	X	X		X
ODS								
Lookup/Infrastructure								
LDAP	X	X	X	X	X	X		X
AD	X	X		X	X	X		

Chapter 2: Contact Information Data Standards

“Data standards” are specific rules for entering data into the multiple systems of record used at UC Merced. The contact information data standards defined below are needed to maintain consistency, ensure data integrity, and enhance communication related to contact information data for the UC Merced community by:

- Avoiding creation of duplicate personal identification master records (PIDMs) for a single entity within a system of record
- Enabling interface set up among multiple systems of record
- Using standard entry to facilitate consistent reports and searches
- Using U.S. Postal Service’s recommended mailing address setup and procedures

Global Decisions Affecting All Contact Information

Capitalization: Use mixed (upper- and lower-case) letters following standard capitalization rules for all entries, unless an exception is specified in the individual standards below.

Special Characters: DO NOT use special characters such as the following unless an exception is specified in the individual standards below:

- %
- #
- slash (i.e., / or \)
- asterisk (*)
- comma (,)
- double or single quotation marks (“, ”, ‘, or ’)—apostrophes, however, are acceptable
- parentheses

Identification Number Standards

In keeping with the spirit of the Family Educational Rights and Privacy Act (FERPA) and the current trends in privacy cases and legislation, this identification number is never the person’s social security number. An individual’s social security number may be recorded in any system of record; however, safeguards should be in place to ensure that only system users with legitimate educational interest under the (FERPA) have access to social security number.

Name Standards

When you enter a person’s name, use the spelling, format, and spacing that the individual provides, following the guidelines listed below. Standards for formatting names for output, such as using preferred over first name, etc., will be a business decision determined by individual departments based on purpose and audience. Also see Global Decisions Affecting All Contact Information (capitalization and special characters) section above.

NOTE 1: For students or faculty holding F1 or J1 visas, the individual’s full name must match the full name on his/her passport.

NOTE 2: Students who request a name change must provide legal documentation.

Last Name

Punctuation: *Hyphens* may be used according to customer preference. This would be most common in instances where someone wants to hyphenate a maiden and married name, and in cases of cultural convention (for example, Al-Hamad). In instances where there are two last names that are un-hyphenated (for example, Mary Elizabeth Creton Quinton), Elizabeth would be input as the middle name and Creton Quinton would be input as the last name.

Apostrophes may be used in such names as O’Leary, O’Connor, etc.

Periods are not used. In an abbreviation of a person's name (R John Smith, John R Smith) the initial should be placed in the appropriate field without the period.

Capitalization: Capitalization should be retained according to customer preference.

- Examples: AL-Madani, Van de Voorde, de la Cruz, van de Graaf

Placement: In instances when an individual has only one name (for example, Cher), enter the name in the Last Name field. If the system of record requires a character in the First Name field, enter a period.

Spacing: Spacing between syllables (that is, Mc, Mac, La, etc.) and the main portion of the name can be retained according to customer preference.

- Examples: Mc Donald, Mac Phearson, De La Rosa

Prefixes, Suffixes, and Titles: Do **NOT** use titles, prefixes, or suffixes in the Last Name field.

- Examples: Jr, III, Esq, PhD, etc., should never be entered in the Last Name field.

First Name

Punctuation: *Hyphens* may be used. *Apostrophes* may be used.

Periods are not used, not even in an abbreviation in a person's name (R John Smith, John R Smith).

Placement: *Single Character First Names* should be entered without a period. In those cases where a single character is designated as the first name and then followed by a middle name, place the single character in the first name field and the middle name in the middle name field. Similarly, if a person has a double first name, enter both names in the first name field. If they have a middle name, enter the middle name in the middle name field.

- Examples: Jo Pat Lydia Smith (First Name=Jo Pat, Middle Name=Lydia)

Spacing: Spaces are permitted for double first names (for example, Mary Ann, Bobby Joe).

Other: Do **NOT** use titles, prefixes, or suffixes in the First Name field.

- Examples: Dr, Mr, Mrs, The Honorable, should never be used in the First Name field.

Middle Name

Punctuation: *Hyphens* may be used. *Apostrophes* may be used.

Periods are not used. In an abbreviation of a person's name (R John Smith, John R Smith) the initial should be placed in the appropriate field without the period.

Spacing: Spaces are permitted between multiple names.

Other: Do NOT use titles, prefixes, or suffixes in the Middle Name field.

Preferred First Name

Preferred First Name may be entered into a preferred name field if the system of record provides such a field. If a person chooses to be referred to by his/her first and middle name enter both names in the preferred first name field.

- Example: If S Paul Smith wishes to go by Paul, then Paul would be entered into the preferred name field.

Name Prefix and Suffix

Prefix and/or Suffix may be entered into the respective prefix/suffix field if the system of record provides such a field. Enter the prefix and/or suffix without a period. See Appendixes B and C for lists of valid values.

Legal Name

Legal Name may be entered into a legal name field if the system of record provides such a field. It should be used only if the legal name is different from the name on record. All punctuation rules apply.

Confidential Information Indicator (FERPA)

The system of record should maintain this information if the student/alumni have filed a restriction to prevent disclosure of directory information (via a Student Record Confidentially Update form filed with the Office of the Registrar) and the system of record allows for this restriction to be stored. This restriction reflects that the individual wants all directory information protected from public disclosure

Address Standards

This section of standards identifies address types that the university maintains and the definition of each type as well as address data standards. More specific information related to specific address types maintained in each system of record and steward of the address data appears in Appendix D. Unless an exception due to business practice is noted, all systems of record will use U.S. Postal Service's recommended mailing address setup and standards.

Address Types

(Note that for any given time period, multiple address types may be the same. For example, a new student may live on campus and want his/her mail sent to that address. If so, Campus Address, Current Physical Address, and Mailing Address would be the same for that time period.)

Campus Address: From a student perspective, "If I Live on Campus, This Is the Location." This address is used only if students live in the residence halls on campus.

Current Physical Residence Address: From a student/alumni perspective, "Here Is Where I Currently Live." Students should be able to update this address via the web (MyUCMerced).

Emergency Address: From a student perspective, "Contact This Person In Case of Emergency." Students should be able to update this address via the web (MyUC Merced).

Foreign Permanent Address: For International students only. From an international student perspective, "Here Is My Address in My Country of Origin." This address may only be updated with the approval of the Office of International Affairs.

Mailing Address: From a student perspective, "Here Is Where I Want My Mail Sent." Students should be able to update this address via the web (MyUCMerced).

Parent/Family/Sponsor/Permanent 1: From a student perspective, "Individuals at This Address Will Always Know Where to Locate Me" or "Here's a Primary Place I Might Live During School Breaks." Students should be able to update this address via the web (MyUCMerced).

Parent/Family/Sponsor/Permanent 2: From a student perspective, "An Additional Address for Other Individuals Who Will Always Know Where to Locate Me" or "Here's a Secondary Place Where I Might Live During School Breaks." Students should be able to update this address via the web (MyUCMerced).

Street Address Standards

Street address information is typed in mixed (upper/lower) case format. Also see Global Decisions Affecting All Contact Information (capitalization and special characters) section above. See Appendix A for codes to use for street designator abbreviations.)

Punctuation: Hyphens, periods and slashes may be used only when needed for clarity or designated fractions.

- Examples: Mid-Island PLZ, 39.2 Rd, 101 ½ Main St, 289-01 Montgomery Ave

Other: Special characters such as # or % or other characters that are not accepted in a particular system of record should not be used. (See above section Global Decisions Affecting All Contact Information.)

Secondary Address Unit Designators: If the address is multi-unit apartment or building, place the room, suite, or apartment number to the right of the street address. Never use an additional line for this data. If the secondary unit designator is not provided, i.e., 3454 N Jones #4, remove the “#” and abbreviate as “No.”

Recommended abbreviations are:

Apartment = Apt	Room = Rm	Suite = Ste
Space = Sp	Floor = Fl	Department = Dept

- Examples: 1624 SW Donner Avenue No 5, 102 Main Street Apt 101, 1356 Executive Drive Ste 202

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

- Examples: East = E, West = W, North = N, South = S, Southwest = SW

Line Placement and PO Box: Do not enter data into a system of record’s second address line until data have been entered into the first address line. Only use the one line if possible. Exception: International addresses may often require use of all available lines (see International Address Section below).

When entering PO Box, do not enter P.O. Box with periods. Enter simply PO Box. There are times when the zip code for the street address is different from the zip code for the PO Box (for example, a Merced street address versus an Atwater PO Box number).

City Standards

All city information is typed in mixed (upper/lower) case format and punctuation should not be used.

County Code Standards

A county code may be entered for California addresses if the system of record provides such a field.

State and Province Standards

State codes must be entered for all U.S. and Canadian addresses (if the system of record provides for entry of Canadian provinces). This field should remain blank for non-U.S. and non-Canadian addresses.

Zip Code Standards

Zip codes must be entered for all U.S. addresses. International postal codes will appear in this field (if the system of record provides for entry of international postal code data). For U.S. addresses, enter the entire nine-digit zip code if it is available and the system of record provides for storage of nine-digit zip codes.

Country Code Standards

Country codes must be entered for all non-U.S. and Canadian addresses (if the system of record provides for entry of non-U.S. country codes).

Military Address Standards

Military addresses for destinations within the United States should be addressed no differently than any other mail. Following are instructions for military addresses outside of the United States:

Enter the APO or AFO code into the city field.

In the state field enter:

AE – Europe, Middle East, Africa or Canada (ZIP=09nnn)

AP – Pacific (ZIP=96nnn)

AA – The Americas (excluding Canada) (ZIP=34nnn)

• Example:

Alice VanFrogulemen

HHB 6th Battalion 43rd Box 72

Air Defense Artillery CMR 417

APO AE 09602-8802

International Address Standards

Enter addresses for street following U.S. standards. Use multiple street lines if needed for long addresses. Enter Province and City together in the City field, not in street fields. Enter Canadian provinces in the State field if the system of record provides for entry of Canadian provinces. The state field should remain blank for non-U.S. and non-Canadian addresses. International postal codes should be entered in the Zip Code field unless the country does not use postal codes. International postal codes may be alphanumeric. International country should be entered using all capital letters.

• Example (first two lines are street; third line is city/province; fourth line is postal code):

Rm 9 Hui Lui 4 Xiang

Xin Zhai Cun Yui Jiao Zhen

Jiedong Guangdong

515557

CHINA

Business Rules for F1 and J1 Visa Types: Mailing address must be maintained and reported to SEVIS. Current physical address, if not the same as the mailing address, must be maintained and reported if requested by Citizenship and Immigration Services. A permanent foreign address must be maintained. The office of International Affairs maintains the foreign permanent address and may maintain additional address types.

Telephone Number Standards

Telephone numbers corresponding with the seven address types listed above may be maintained. In addition, other telephone types may be maintained independent of the address type depending on the system of record. (Example: cellular phone number, billing phone number, business/work phone number, fax number.) More specific information related to specific telephone types maintained in each system of record appears in Appendix E.

Area Code

The three-digit area code must be entered for all phone numbers.

Phone Number

Enter the seven-digit phone number without the hyphen between the third and fourth digits unless the system of record requires a hyphen. If an extension number is provided, enter only the digits of the extension in the proper field in the system of record. Do not enter EXT or X into the extension field. Example: 7300.

For international phone numbers, enter the first three numbers in the Area Code Field, the next six numbers in the Phone Number field, utilizing the Phone Extension field, if necessary.

Email Standards

All students, employees, and alumni have an internal UC Merced email account. The UC Merced Policy on the Use of Email for Official Communications with Students (November 15, 2005) established email as the method for official communication with undergraduate and graduate students. More specific information related to specific email types maintained in each system of record appears in Appendix F.

Chapter 3: General Person Information Standards

The general person or biographic data standards defined below apply for the multiple systems of records used at UC Merced. Refer to the Appendix listed below for specific codes/descriptions for any given system of record.

Gender

Refer to Appendix G for gender codes/descriptions.

Employees and Student Employees

All employees must be classified as male or female.

Students

Gender is self reported and not required for students. It should be entered if provided.

Social Security Number

Due to current trends in privacy cases and legislation, Social Security Numbers will only be used to identify constituents when necessary due to business practices.

Employees and Student Employees

Social Security Number is required for all employees of any type. If Social Security Number is not provided, leave the corresponding data field blank.

Students

Social Security Number is not required for students, though it is required for financial aid applicants. It should be entered if provided, as it assists in the prevention of multiple person records.

Date of Birth

Employees and Student Employees

Date of Birth is required for all employees of any type.

Students

Date of Birth is not required for students, though it is required for financial aid applicants, international students, and residence hall occupants. It should be entered if provided, as it assists in the prevention of multiple person records. Otherwise, the field should be left blank.

Citizen Type

Refer to Appendix H for citizen type codes/descriptions.

Employees and Student Employees

Citizen type is required for all employees of any type.

Students

Citizen type is self reported and not required for students. If the student declines to state citizen type, an unclassified status is used. Updated citizen type information should be verified. Exception: country of citizenship is required for international students.

Veteran Information

Refer to Appendix I for veteran information codes/descriptions.

Employees and Student Employees

Veteran information is self reported and not required for employees of any type.

Students

Veteran information is self reported and not required for all students. When reported it is verified for veteran certification purposes in order to qualify for services.

Marital Status

Refer to Appendix J for marital status codes/descriptions.

Employees and Student Employees

Marital status is self reported and required for all employees of any type.

Students

Marital status is self reported and not required for students, though it is required for financial aid applicants. It should be entered if reported.

Relationship

Relationship data are used to identify a relationship between an individual and an applicant, student, employee, or donor with whom the university has a relationship. Refer to Appendix K for relationship data.

Employees and Student Employees

Relationship data are maintained for employees as applied to benefits information.

Students

Relationship data are maintained for students as applied to emergency contact information (see Chapter 2).

Ethnicity

Refer to Appendix L for ethnicity codes/descriptions.

Employees and Student Employees

Ethnicity is self reported and not required for employees of any type.

Students

Ethnicity is self reported and not required for students. It should be entered if provided.

Deceased Information**Employees and Student Employees**

Only Human Resources department representatives will enter this information.

Students

Office of the Registrar representatives will enter this information for current students. Admissions representatives will enter this information for prospective students.

Appendix A: Common Postal Abbreviations

Designator	Code	Designator	Code
Alee	Aly	Alley	Aly
Annex	Anx	Arcade	Arc
Avenue	Ave	Bayoo	Byu
Bayou	Byu	Beach	Bch
Bend	Bnd	BG	Bg
Bluff	Blf	Boulevard	Blvd
Bottom	Btm	Branch	Br
Bridge	Brg	Brook	Brk
Burg	Bg	Bypass	Byp
Camp	Cp	Canyon	Cyn
Cape	Cpe	Causeway	Cswy
Center	Ctr	Circle	Cir
Circle	Cir	CLB	Clb
Cliff	Clfs	Club	Clb
CMP	Cp	CENTER	Ctr
CNYN	Cyn	Corner	Cor
Corners	Cors	Course	Crse
Court	Ct	Cove	Cv
Coves	Cv	Crescent	Cres
Creek	Crk	Crossing	Xing
Crossway	Cswy	Curve	Crv
Dale	Dl	DAM	Dm
Divide	Dv	Drive	Dr
Estate	Est	Expressway	Expy
Extension	Ext	Fall	Fall
Falls	Fls	Ferry	Fry
Field	Fld	Fields	Flds
FL	Fl	Flat	Flt
Ford	Frd	Fords	Frd
Forest	Frst	FRY	Fry
FT	Ft	Garden	Gdn
Gateway	Gtwy	Glen	Gln
Green	Grn	Grove	Grv
Harbor	Hbr	Haven	Hvn
Height	Hts	Highway	Hwy
Hill	Hl	Hollow	Holw
Inlet	Inlt	Island	Is
Islands	Iss	Junction	Jct
Key	Ky	Keys	Kys
Knoll	Knl	Knolls	Knls

Designator	Code	Designator	Code
Lake	Lk	Lakes	Lks
Landing	Lndg	Lane	Ln
Lanes	Lns	Light	Lgt
Lights	Lgts	Loaf	Lf
Lock	Lck	Locks	Lcks
Lodge	Ldg	Loop	Loop
Mall	Mall	Major	Mjr
Meadow	Mdw	Mill	MI
Mission	Msn	Mountain	Mtn
Manor	Mnr	Hill	HI
Orchard	Orch	Oval	Oval
Park	Park	Pass	Pass
Path	Path	Pike	Pike
Pine	Pne	Parkway	Pky
Place	Pl	Plain	Pln
Plaines	Plns	Plaza	Plz
Point	Pt	Port	Prt
Prairie	Pr	Radial	Radl
Radiel	Radl	Ranch	Rnch
Ranches	Rnchs	Rapid	Rpd
Ridge	Rdg	Road	Rd
Rest	Rst	River	Riv
Row	Row	Shoal	Shl
Shore	Shr	Spring	Spgs
Spur	Spur	Square	Sq
Station	Sta	Start	Start
Strave	Stra	Stream	Strm
Street	St	Summit	Smt
Terrace	Ter	Turnpike	Tpke
Trace	Trce	Track	Trak
Trafficway	Trfy	Trailer	Trlr
Tunnel	Tunl	Turn	Turn
Union	Un	Valley	Vly
Viaduct	Via	View	Vw
Village	Vlg	Ville	Vl
Vista	Vis	Walk	Walk
Way	Way	Wells	Wls
Zing	Zing		

Appendix B: Name Prefix Abbreviations

Non-Military

Description	Prefix Abbreviation
Bishop	Bishop
Brother	Bro
Doctor	Dr
Father	Fr
Honorable	Hon
Professor	Prof
Sister	Sr

Military

Description	Abbreviation			
	Army	Navy	Air Force	Marine Corps
Admiral		ADM		
Brigadier General	BG		Brig Gen	Bgen
Captain	CPT		Capt	Capt
Chief Warrant Officer	CWx (x=1-5)	CW0x (x=2-4)		CWO-x (x=1-5)
Colonel	COL		Col	Col
Commander		CDR		
Ensign		ENS		
First Lieutenant	1LT		1 st Lt	1stLt
General	GEN		Gen	Gen
Lieutenant		LT		
Lieutenant (Junior Grade)		LTJG		
Lieutenant Colonel	LTC		Lt Col	LtCol
Lieutenant Commander		LCDR		
Lieutenant General	LTG		Lt Gen	LtGen
Major	MAJ		Maj	Maj
Major General	MG		Maj Gen	MajGen
Rear Admiral		RADM		
Second Lieutenant	2LT		2 nd Lt	2ndLt
Vice Admiral		VADM		

Appendix C: Name Suffix Abbreviation

Description	Suffix Abbreviation
Certified Public Accountant	CPA
Doctor of Chiropractic	DC
Doctor of Divinity	DD
Doctor of Dental Surgery	DDS
Doctor of Dental Medicine	DMD
Doctor of Osteopathy	DO
Doctor of Veterinary Medicine	DVM

Description	Suffix Abbreviation
Doctor	Dr
Doctor of Education	EdD
The Second	II
The Third	III
Jurist Doctor	JD
Junior	Jr
Doctor of Laws	LLD
Doctor of Medicine	MD
Doctor of Optometry	OD
Past Commander, Police Constable, Post Commander	PC
Doctor of Philosophy	PhD
Retired	Ret
Registered Nurse	RN
Registered Nurse Clinician	RNC
Senior	Sr
United States Army	USA
United States Air Force	USAF
United States Air Force Reserve	USAFR
United States Army Reserve	USAR
United States Coast Guard	USCG
United States Marine Corps	USMC
United States Marine Corps Reserve	USMCR
United States Navy	USN
United States Navy Reserve	USNR

Appendix D: Address Types

The following table displays various address types by description and system.

Note: Based on business and regulatory needs, address, phone, and email types will continue to evolve.

Description	Explanation	Banner		Raiser's Edge	StarRez	CS Gold	PPS	FsaAtlas
		Code	Restricted	Description	Description	Description	Description	
Student Housing (Steward: Housing Office)	From a student perspective, "If I Live on Campus, This Is the Location." This address is used only if students live in the residence halls on campus.	CA	Address Engine Update Not Allowed	Campus Residential Student Address	Campus Only Housing Office may enter or update this address; batch updates StarRez to Banner			Local Current
Current Physical Residence Address (Steward:)	From a student/alumni perspective, "Here Is Where I Currently Live."	(PR)	Address Engine Update No PO Box	Physical Address – If different than Permanent				Local Current For international students only Office of

		Banner		Raiser's Edge	StarRez	CS Gold	PPS	FsaAtlas
Description	Explanation	Code	Restricted	Description	Description	Description	Description	Description
<i>Registrar While Student; Alumni When No Longer Student)</i>				address (PR/FP) and mailing address (MA), then add 'Physical Address the constituent's address field.				International Affairs may approve and submit to Registrar's to update in Banner
Emergency Address <i>(Steward: tbd)</i>	From a student perspective, "Contact This Person In Case of Emergency."	EM	Address Engine Update Allowed	If the system is capturing the relationship, then we can add this information into the student's record as a relationship with the contact information	Emergency			Emergency (This address type is currently not active but can/will be activated) For international students only Office of International Affairs may approve and submit to Registrar's to update in Banner
Foreign Permanent Address <i>(Steward: Office of International Affairs)</i>	For International students only. From an international student perspective, "Here Is My Address in My Country of Origin." This address may only be updated with the approval of the Office of International Affairs.	FP	Address Engine Update Not Allowed	Student Permanent Address: The student's permanent home mailing address – often their parents' address.				Permanent For international students only Office of International Affairs may approve and submit to Registrar's to update in Banner
Mailing Address <i>(Steward: Registrar While Student; Alumni When No Longer Student)</i>	From a student perspective, "Here Is Where I Want My Mail Sent." Students should be able to update this address via the web (MyUCMerced).	MA	Address Engine Update Allowed	Home address: the home address of a donor, employee or alumni Note: Can be captured as the Preferred Mailing address and send mail = yes.	Mailing	Local		Mailing For international students only Office of International Affairs may approve and submit to Registrar's to update in Banner
Parent/Family/Sponsor 1	From a student perspective, "Individuals at	PA	Address Engine Update Allowed	Home address: the home	Permanent Contact	Home		

		Banner		Raiser's Edge	StarRez	CS Gold	PPS	FsaAtlas
Description	Explanation	Code	Restricted	Description	Description	Description	Description	Description
<i>(Steward: Registrar While Student; Alumni When No Longer Student)</i>	This Address Will Always Know Where to Locate Me” or “Here’s a Primary Place I Might Live During School Breaks.”			address of a donor, employee or alumni Note: Can be captured as the Preferred Mailing address and send mail = yes.				
Parent/Family/Sponsor 2 <i>(Steward: Registrar While Student; Alumni When No Longer Student)</i>	From a student perspective, “An Additional Address for Other Individuals Who Will Always Know Where to Locate Me” or “Here’s a Secondary Place Where I Might Live During School Breaks.”	PB	Address Engine Update Allowed	Home address: the home address of a donor, employee or alumni Note: Can be captured as the Preferred Mailing address and send mail = yes.	Permanent Contact			
Undergraduate application permanent address	This information is loaded as part of initial application process and never changed. Used for reporting.	UA	Address Engine Update Not Allowed					

Appendix E: Telephone Types

	Banner	Raiser's Edge	StarRez	CS Gold
Description	Code	Description	Description	Description
Billing	BI			
Business phone number	BU	Assistant Phone		
		Calendaring Phone		
		Int'l Work-Direct		
		Int'l Work-Main		
		Business Main		
		Business Personal		
Student Housing phone number	CA		Campus	
Cellular phone number	CELL	Cell	Mobile	Local Phone
		Int'l Cell		
Fax number for home, work, or business.	None	Fax – Home		
		Fax – Work		
		Int'l Fax		
Other – to be updated to another telephone type after admission	MA	Home		
Physical Residence number	PR			
Parent//Family/Sponsor/ (s) phone number.	PA	Home	Phone	Home Phone
		Int'l Home		
Second parent phone number.	PB	Home		

Appendix F: Email Types

Description	Banner GTVEMAL	Raiser's Edge	StarRez	CS Gold	PPS
Assistant		Assistant Email			
Business		Business Email			
External	EX	Address Engine Update Allowed	Personal Email		
Financial Aid	FAID	Address Engine Update Not Allowed			
Internal UC Merced	IN	Address Engine Update Not Allowed	UCM Email	Email	Email
Undergraduate Admissions Applicant	UAPP				

Appendix G: Gender Types

Description	Banner	Raiser's Edge	StarRez	CS Gold	FsaAtlas	PPS	PAWS
Female	F	Female	F	F	Male	F	
Male	M	Male	M	M	Female	M	
Not available	N	Unknown	U	Null	Unknown		

Appendix H: Citizen Types

Description	Banner	Raiser's Edge--not maintained	StarRez	CS Gold not maintained	FsaAtlas--country of citizenship maintained	PPS
Citizen	Y		Citizen			C
Nonimmigrant-Visa Required	NI		Non-Immigrant			
Permanent Resident	PR		Permanent Resident			
Refugee	RF					
Substantial Presence*						
Unclassified	N		Unclassified			
Nonresident alien, no tax treaty form--must be resident of Japan, Korea, Canada, or Mexico						A
Nonresident alien--chooses treaty exemption & not eligible for FICA						E
Resident for tax purposes--chooses treaty exemption & is eligible for FICA withholding						F
Non-resident alien no tax treaty						N
Pending Permanent Resident						P
Permanent Resident or Resident for tax purposes						R
Non-resident student						S

Description	Banner	Raiser's Edge--not maintained	StarRez	CS Gold not maintained	FsaAtlas--country of citizenship maintained	PPS
from India						
Non-resident of the US who is a UC employee and working outside the US.						X

* Qualifies as resident by having met the substantial presence test, but does not hold a green card.

Appendix I: Veteran Information

Student veteran data stored in Banner are listed below.

Banner Veteran File Number

This field on SPAPERS is used by Veteran Services (Office of the Registrar) to store the student veteran file number.

Banner Veteran Category

This field on SPAPERS is not currently used (nor is the category updatable in the underlying table). Available codes are listed below:

Description	Banner Code SPAPERS
None	N
Both Vietnam and Other Eligible Veteran	B
Other Protected Veteran Only	O
Vietnam Veteran Only	V

Banner Veteran Code

This field on SGASTDN is used by Veteran Services. The student's veteran benefit category is stored here.

Description	Banner Code SGRVETN
Chapter 30 Montgomery GI Bill	0
Chapter 31 Rehabilitation/Voc	1
Chapter 32 VEAP	2
Chapter 33 Post 911	3
Chapter 35 Dependent	5
Chapter 1606 Reservist MGIB	6
Chapter 1607 REAP	7
ROTC	9
California Veterans Fee Waiver	V

Appendix J: Marital Status

Description	Banner STVMRTL	Raiser's Edge	StarRez-- not maintained	CS Gold-- not maintained	FsaAtlas	PPS*	At Your Service
Single	1	Single			1-Single		
Single/Divorced/Widowed		Widowed/ Separated/ Divorced			3- Separated		S
Married/Remarried/Legal Spouse	2	Married			2- Married	S	M
Same-Sex Spouse or Domestic Partner		Partner				D	
Opposite-sex domestic partner		Partner				L	
Adult dependent relative						A	
Not available	3						
Divorced/Widowed	4				Divorced/ Widowed		

*In general for PPS, marital statuses are updated for health and welfare plans and tax withholding elections only.

Appendix K: Relationship

Description/Relationship	Banner STVRELT	Raiser's Edge	StarRez-- not maintained	CS Gold-- not maintained	FsaAtlas	PPS--not updated
Ex-Spouse/Domestic Partner	A					
Acquaintance		Acquaintance				
Advisor		Advisor				
Agent		Agent				
Assistant		Assistant				
Aunt		Aunt				
Board Member		Board Member				
Broker		Broker				
Brother		Brother				
Brother-in-law		Brother-in-law				
Business Partner		Business partner				
CEO		Chair				
Chair		Chair				
Chair Holder		Chair Holder				
Chairman and CEO		Chairman and CEO				
Chairman Emeritus		Chairman Emeritus				
Child	C	Child			Child	
Co-Founder		Co-Founder				

Description/Relationship	Banner STVRELT	Raiser's Edge	StarRez-- not maintained	CS Gold-- not maintained	FsaAtlas	PPS--not updated
Co-Founder and President		Co-Founder and President				
Co-Founder and Principal		Co-Founder and Principal				
Co-Founder, Chairman and CEO		Co-Founder, Chairman and CEO				
Colleague		Colleague				
Company		Company				
Co-Owner		Co-Owner				
Corporate Headquarters		Corporate Headquarters				
Cousin		Cousin				
Daughter		Daughter				
Daughter-in-law		Daughter-in-law				
Director		Director				
Donor Representative		Donor Representative				
Employee		Employee				
Employer		Employer				
Executive Assistant		Executive Assistant				
Ex-Spouse		Ex-Spouse				
Family Foundation		Family Foundation				
Family Trust		Family Trust				
Father		Father				
Father-in-law		Father-in-law				
Foundation		Foundation				
Founder		Founder				
Friend	R	Friend				
Fund		Fund				
God Daughter		God Daughter				
God Mother		God Mother				
Granddaughter		Granddaughter				
Grandfather		Grandfather				
Grandmother		Grandmother				
Grandson		Grandson				
Grandparent	G					
Guardian	U					
Member		Member				
Mother-in-law		Mother-in-law				
Mother		Mother				
Neighbor	N					
Nephew		Nephew				

Description/Relationship	Banner STVRELT	Raiser's Edge	StarRez-- not maintained	CS Gold-- not maintained	FsaAtlas	PPS--not updated
Niece		Niece				
Owner		Owner				
Owner/Founder		Owner/Founder				
Parent	T					
Parent Company		Parent Company				
Partner		Partner				
Power of Attorney		Power of Attorney				
President		President				
President and CEO		President and CEO				
President and Chairman		President and Chairman				
President and COO		President and COO				
Primary Donor		Primary Donor				
Principal		Principal				
Other	O					
Retired Employee		Retired Employee				
Sibling	L	Sibling				
Significant Other	X	Significant Other				
Sister						
Sister-in-law		Sister-in-law				
Son		Son				
Son-in-law		Son-in-law				
Spouse/Domestic Partner	P	Spouse			Spouse	
Subsidiary		Subsidiary				
Supervisor		Supervisor				
Trustee		Trustee				
Uncle		Uncle				
US Corporate Offices		US Corporate Offices				

Appendix L: Ethnicity (List of Valid codes used by UC)

Code	Description
AF	African American/Black
AI	American Indian/Alaskan Native
AN	Asian Indian
BN	Bangladeshi
CM	Cambodian
CX	Chinese (except Taiwanese)

Code	Description
FJ	Fijian
FP	Filipino/Filipino American
GC	Guamanian/Chamorro
HI	Hawaiian
HM	Hmong
IAF	African American or Black (IPEDS)
IAI	American Indian or Alaskan Native (IPEDS)
IAS	Asian (IPEDS)
IHS	Hispanic or Latino (IPEDS)
IO	Indonesian
IPI	Pacific Islander or Native Hawaiian (IPEDS)
IWH	White (IPEDS)
JA	Japanese/Japanese American
KO	Korean
LA	Other Spanish American/Latino
LO	Laotian
ML	Malaysian
MX	Mexican/Chicano
OA	Other Asian
OP	Other Pacific Islander
OT	Other
PK	Pakistani
SL	Sri Lankan
SM	Samoan
TH	Thai
TN	Tongan
TW	Taiwanese
VT	Vietnamese
WH	White/Caucasian

IPEDS Reporting Categories

- 1) Nonresident Alien
- 2) Race and Ethnicity unknown
- 3) Hispanics of any race
- For non-Hispanics only:
- 4) American Indian or Alaska Native
- 5) Asian
- 6) Black or African American
- 7) Native Hawaiian or Other Pacific Islander
- 8) White
- 9) Two or more races