

BANNER USERS' GROUP-STUDENT
Minutes of Meeting May 2, 2002

- **Call to Order:** Terri Tomblin-Byrd called the meeting to order at 2:10 in Old Main 103.
- **Members Present:**

Cheri Musgrave	Financial Aid
Bob Collier	Bursar
Joe Whitt	Residence Services
Pat Gebhart	Computing Services, Enrollment Management
Terri Tomblin-Byrd	Computing Services
Luther Workman	Admissions
Michael McGuffey	Institutional Research
Mary Waller	Registrar
Dan Holbrook	Associate Deans
Myke Watts	Computing Services
Scott Hoppe	International Student Program

- **Minutes:** The April 2002 minutes were approved as electronically distributed.
- **Correspondence:** See attachments

COMMITTEE REPORTS

- **Subcommittee on Billing:**
No Report.
- **Subcommittee on CAPP:**
Mary Waller reported for Roberta Ferguson that Barbara Tarter approved reactivating the CAPP committee. Chairman is Roberta Ferguson and committee members are Pat Gebhart and Dan Holbrook. A meeting will be scheduled in early June.
- **Banner Oversight Committee (BOC):**
Terri reported for the BOC. They will be working on an Information Security Policy for employees. If BUG-S units do not nominate a trainer for BUG-L, she will make assignments. Only two areas have sent her names so far.

OLD BUSINESS

- **MILO:**
This has been a smooth registration period. The VR committee recommended replacement of the current system. Terri was asked to get a confirmation of the budget before contacting vendors. She submitted a budget request but has not received approval.
- **Human Resources/Finance:**
No Report.
- **Performance and Priority Issues:**
There have been no issues until today when several people have lost network and printer connections. Terri thinks it is a network problem.
- **General Person Data Ownership:**
The Associate Deans meeting was cancelled so Dan was unable to verify that the academic departments received procedures on entering faculty data into Banner.

- **Banner Student Privilege Request Form:**
No Report.
- **Duplicate PIDM/Person:**
Bob Collier presented procedures and a worksheet (copies attached) that his committee developed to handle multiple PIDM/ID problems. He also submitted a proposal to Computing Services to develop a script to identify multiple PIDM problems and to have the DBA move all existing data to the correct PIDM. Terri stated that there is no safe way to write a script to move all data and that the decisions would have to be made outside the script. The DBA cannot make a functional decision. Bob will re-convene his committee to rewrite the proposal (copy attached) and submit it to the BUG-S list. If there are no objections to the proposal before the BOC meeting, Terri will submit it to the BOC for a vote. Pat has not received any information from Kevin Stewart at the University of British Columbia on sharing their code for identifying and correcting PIDM problems. Joe Whitt, Luther Workman, and Scott Hoppe asked to be added to the BUG-S list.
- **Printing Students' Schedules:**
Roberta Ferguson contacted Mike Adkins in Computing Services Networking to ask him to assess the printer situation in the Registrar's Office. They haven't set up a meeting yet to do this.
- **myMU:**
The latest release of Campus Pipeline v. 3.1 is installed on a test box, and a demo was conducted yesterday for myMU committee members. Terri explained new functionality of course consolidators to prepare course materials once for multiple sections and the ability to pull all e-mail lists together. Also, there is a group portal to provide for creating groups or clubs within the portal. Also, there is a hand-held sync to offer students the opportunity to sync their portal calendars with their Palms. Staff can sync their Outlook calendars with their portal calendars so students can see them. Implementation date is anticipated for late Summer to be ready for the Fall term. The Web Mail application is being deleted, and Terri is working on a tapeload process to load "affiliates." The BOC has approved second tier Computing Services Help Desk technicians resetting PIN's on GOATPAC back to the birthdate. Someone at the Medical School will also assume this task. The creation of the MUNet username will occur in the database that will facilitate getting new people into the portal. Specifics on BOC approvals can be found on the BOC Web site.
- **Common Name/Address/SS# Change Form:**
BUG-S and BUG-F both approved the new form. The BOC must vote to give final approval.
- **STVNATN:**
Terri will see that the nation codes are entered on STVNATN as soon as possible.
- **Usage of Generated ID's:**
Pat presented a summary (copy attached) of the use of Generated ID's in the Admissions Office and the procedures for changing the Generated ID's to Social Security numbers. Terri will present the policy to the BOC.
- **Legislative Bill:**
Michael McGuffey's group met two weeks ago to discuss what needed to be done to comply with HB2374. Michael feels that we need clarification on the intent of the law and whether this could be controlled through policy rather than changing our forms and processes.
- **"SC" Address Types:**
Terri stated that the Residence Services roll process for residence hall assignment data every semester does insert a termination date of the end of the semester. Jim Richendollar terminated several hundred "SC" addresses added back in 1993-94. After 1994, there are not many "SC" addresses entered without a terminate date.

NEW BUSINESS

- **April 5.x Release:**

The April 5.x release was released by SCT and WVNET has it. Financial Aid needs the 5.5 release installed as soon as possible. Finance needs 5.5 installed on pre-prod. Terri asked for offices to think about when to install the 5.5 release in production. The new Release Guides will be published on the Banner Web site as soon as we receive them.

- **BOC Nominations:**

It is time to elect representatives to the BOC for a 2-year term. Myke Watts moved and it was unanimously approved to re-elect Bob Walker as our Voting Member and Michael McGuffey and Nadine Hamrick as our Non-Voting Members. Both Bob and Nadine will be given the opportunity to decline the election since neither were at the meeting.

ADJOURNMENT

- Meeting was adjourned at 3:25p.m.

ANNOUNCEMENTS

- The next BUG-S meeting will be June 6, 2002.

Marshall University
Sub-committee on Multiple ID/PIDMs
Banner User Group
Student

May 7, 2002

Recommendation:

This sub-committee recommends that a script be written by the Database Administrator (DBA) of Marshall University that identifies Multiple ID/PIDMs. Once the Multiple ID/PIDMs are located, the office with the highest priority on record, based upon the data ownership matrix referenced in the Marshall University Banner Oversight Committee Policies and Procedure, is responsible for contacting the individual to obtain documentation of the correct ID/PIDM number.

The Procedures for the resolution of Multiple ID/PIDM (pending approval from BOC) will be utilized from this point forward to resolve the Multiple ID/PIDM issue.



WORKSHEET FOR RESOLVING MULTIPLE PIDM/ID (DRAFT
4/30/02)

Department Originating Worksheet:

Date:

Name:

Correct ID#: Delete? [No](#)

MODULES WHICH CONTAIN INFORMATION FOR THE CORRECT ID:

<u>STUDENT:</u>	<u>HUMAN RESOURCE:</u>	<u>FINANCE:</u>	<u>A/R:</u>
<input type="checkbox"/> Recruiting	<input type="checkbox"/> Applicant	<input type="checkbox"/> Agency	<input type="checkbox"/>
Accts. Receivable			
<input type="checkbox"/> Admissions	<input type="checkbox"/> Employee	<input type="checkbox"/> Bank	
<input type="checkbox"/> Transfer Work	<input type="checkbox"/> Beneficiary	<input type="checkbox"/> Customer	
<input type="checkbox"/> Gen Student	<input type="checkbox"/> Cobra Person	<input type="checkbox"/> Employee	
<u>FINANCIAL AID:</u>			
<input type="checkbox"/> Registration		<input type="checkbox"/> Financial Mgr	<input type="checkbox"/>
Applicant			
<input type="checkbox"/> Housing		<input type="checkbox"/> Vendor	
<input type="checkbox"/> Faculty			

Incorrect ID#: Delete? [No](#)

MODULES WHICH CONTAIN INFORMATION FOR THE INCORRECT ID:

<u>STUDENT:</u>	<u>HUMAN RESOURCE:</u>	<u>FINANCE:</u>	<u>A/R:</u>
<input type="checkbox"/> Recruiting	<input type="checkbox"/> Applicant	<input type="checkbox"/> Agency	<input type="checkbox"/>
Accts. Receivable			
<input type="checkbox"/> Admissions	<input type="checkbox"/> Employee	<input type="checkbox"/> Bank	
<input type="checkbox"/> Transfer Work	<input type="checkbox"/> Beneficiary	<input type="checkbox"/> Customer	
<input type="checkbox"/> Gen Student	<input type="checkbox"/> Cobra Person	<input type="checkbox"/> Employee	
<u>FINANCIAL AID:</u>			
<input type="checkbox"/> Registration		<input type="checkbox"/> Financial Mgr	<input type="checkbox"/>
Applicant			
<input type="checkbox"/> Housing		<input type="checkbox"/> Vendor	
<input type="checkbox"/> Faculty			

Move Data?	From:	ID#	PIDM	
No	To:	ID#	PIDM	Max A/R Transaction #

Resolution:

Computing Services DBA use only

Data moved by (please include name of representative and date):

Registrar:

Payroll:

Admissions:
Human Resources:
Financial Aid:
Bursar:
Residence Services:
International Student Programs:
Purchasing & Materials Management:

Procedures for the Resolution of Multiple ID/PIDM Problems

A **Multiple ID/PIDM** is defined as two or more PIDM records for one individual.

The office that discovers a **Multiple ID/PIDM** problem should query Banner form GUASYST to determine what records exist under all ID numbers. The office discovering the problem should notify, via e-mail, the following office according to the existing records found on GUASYST:

- If only Admissions Office records (recruit and/or admissions records) exist for a **Multiple ID/PIDM** problem, the Admissions Office will assume responsibility to move their records to the correct number.
- If only Vendor records exist for a **Multiple ID/PIDM** problem, the Purchasing Office will assume responsibility to move their records to the correct number.
- If both Payroll/Human Resources and Registration records exist for a **Multiple ID/PIDM** problem, the problem should be directed to the Payroll Office first.
- If Registration records exist but **no** Payroll records, the problem should be directed to the Registrar's Office.

The office with the highest priority on the record (e.g. Payroll, or Registrar), based upon the data ownership matrix referenced in the Marshall University Banner Oversight Committee Policies and Procedures document, is responsible for contacting the individual to obtain documentation of the correct ID number. The only acceptable documentation for a person record is the individual's Social Security card. For Vendor non-person records, documentation should be a Form W9 Request for Taxpayer Identification Number and Certification. If there is direct contact with an individual with a **Multiple ID/PIDM** problem, the office discovering the problem should seek to obtain the Social Security card or ask the individual to go to the responsible office

The office with first priority on the record should complete the WORKSHEET FOR RESOLVING MULTIPLE ID/PIDMs once it is determined what the **Correct** and **Incorrect** ID's are. All existing Banner records must be moved to one ID number. The "easiest" records to move should be moved to one ID number, although that ID may not necessarily be the **Correct** ID. The "easiest" records to be moved will be jointly agreed upon by the affected offices. It is generally assumed that Payroll records are the most difficult to move. The WORKSHEET FOR RESOLVING MULTIPLE ID/PIDMs will be sent electronically to the offices listed on the form. Once an office has moved its data, a representative of that office should return the Worksheet electronically to the office generating the Worksheet. When all data has been consolidated under one ID, the originating office will notify the Computing Services' DBA to delete the remaining ID. The Worksheet should be filed at the location owning the record for record-keeping purposes. If the **Incorrect** ID now contains all information, proper procedures should be followed to perform a Banner ID number change, thus moving all records to the **Correct** ID and one PIDM.

Timely resolution of a **Multiple ID/PIDM** problem is of utmost importance to avoid further activity on an incorrect ID.

April 29, 2002

GENERATED ID'S/CONVERSION OF GENERATED ID'S TO SOCIAL SECURITY NUMBERS

Beginning in October 2001, the Admissions Office is creating generated ID numbers starting with "@" for new recruit records in Banner when no Social Security number is available. An exhaustive person search is conducted before a new person record is created.

If the student record is only a Generated ID and a Social Security Number is obtained on later recruit information or for an Admissions application:

- Open SPAIDEN
- Perform a person search to verify that the student has only one record
- Select the Generated ID
- Change the Generated ID in the ID field to the Social Security Number; Save
- Generated ID appears on Alternate ID block; Do Not Delete
- Open SPAPERS
- Enter Social Security Number in SSN field; Save.

If student records exist under a Generated ID and a Social Security Number:

- Move all data from the Generated ID to the Social Security Number (including SUAMAIL data)
- Notify the Computing Services DBA via e-mail to delete the Generated ID

If student records exist for two different Social Security-Like Numbers:

- Verify the data that exists for each number on form GUASYST
- If only Recruiting data exists for one of the numbers**, move the Recruiting data to the Social Security Number used for Admissions or Financial Aid records
- Notify the Computing Services DBA to delete the incorrect Social Security Number
- If data exists for other modules under both numbers**, contact the student to request a copy of his/her Social Security card for ID verification
- Communicate with other administrative offices owning Banner data to request that they move their data to the correct Social Security Number
- When all data has been moved to one Social Security Number, notify the Computing Services DBA via e-mail to delete the incorrect ID

Note: In some cases, it may be appropriate to move existing data to the incorrect Social Security-Like number (if less data exists for the correct Social Security Number). If that is the case, when all data has been moved to the incorrect Social Security number, notify the Computing Services DBA to delete the incorrect Social Security Number. Then perform a proper ID change to the correct Social Security Number.