

California State University, Channel Islands

Campus Community

HR/Payroll and Student Administration system



Prepared: March 2003

HRSA Version 8.0

Purpose

The impetus for the discussions leading to this document was to clearly define standards for updating Bio Demo information used in campus community business processes. This goal is important because an individual can have more than one relationship with CSUCI simultaneously (e.g., can be both an employee and a student). Institutional offices in the following student administration functional areas (i.e. student records (SR), admissions (ADM), recruitment (REC), and human resources (HR) should be able to modify personal data for any individual in the system unless the student is already an employee or becomes an employee while in school. In acting on behalf of another functional area, an institutional office must adhere to any requirements that are specific to that functional area (e.g., the use of an address type that is only deployed for the student population). Such cooperative maintenance of the data is necessary if the Campus Community Module is to survive as a commonly held and used set of information.

While this document is not a procedure manual, the expectation is that any procedure manual or training material related to these functions in areas of student records (SR), admissions (ADM), recruitment (REC), financial aid (FA), student financials (SF), human resources (HR), and payroll, will incorporate the definitions and guidelines provided herein.

NOTE: This document was written in anticipation of a campus-wide PeopleSoft implementation, and the references to specific data elements follow the PeopleSoft data structures and naming conventions. However, the recommendations and guidelines provided in this document are intended to serve as a policy template regardless of which system(s) and database(s) are ultimately deployed.

Overview

PeopleSoft Human Resources Student Administration (HRSa) is an integrated system accessing one common database. The Campus Community module of the system provides shared biographic and demographic data, as well as a corresponding set of business processes, to all modules of the areas student records (SR), admissions (ADM), recruitment (REC), financial aid (FA), student financials (SF), human resources (HR), and payroll systems. This translates into one place to store basic personal information—name, address, phone number, email address, citizenship, emergency contacts, etc.—about students, faculty, staff, and alumni regardless of where the initial input originated. A person with multiple associations or relationships with CSUCI will no longer have more than one biographic/demographic record in separate systems. This notion of one place to store basic personal information used in conjunction with agreed business rules holds true even if the set of Campus applications includes non-PeopleSoft solutions.

This shared record of an individual is referred to as his or her ‘people record.’ These people records are created across campus—whether as admissions prospects, applicants, employees, faculty, and volunteer faculty—and stored in one database. When an individual is added to the database, a row is added to the Personal Data table with a unique ID number for that individual. To maintain the integrity of our data, as well as take advantage of the efficiencies that an integrated system offers, it is critical that we not create multiple people records for a given individual.

It is possible to add a new person to the database through the Campus Community module. However, most people records will be created through other business functions. In HR/Payroll, hiring an employee can create a new people record. In Student Administration, new people records will be created when entering a prospect or applicant in the Admissions module and when adding an applicant via QuickEnroll. Once a people record has been created for an individual it can be updated in different places in the system depending on what is being modified, by whom, and when.

Since people records are shared across the Human Resources and Student Administration areas, and they contain information that is likely to be updated over time by different offices, it is important to establish standards for all three areas to follow. The goal of this document is twofold:

- to provide strict, mutually exclusive definitions for name, address, phone, and email types that can be implemented in all areas, as well as agreed-upon formats;
- to provide a high level description of and guidelines for how key pieces of data—name, address, phone, email—are entered in the system and maintained over time.

Section 1

Names

Every name in PeopleSoft has a name type, allowing us to store variations of an individual's name to be used for different purposes especially with the integrated database for Human Resources and Student Administration. For example, many people may have a preferred first name that differs from their primary or legal name. When applicant names are received, the individual may be providing their preferred name versus their legal name. Names in PeopleSoft are effective dated, making it possible to track name changes for any name type over time.

In connection with names is name usage. Name usage functionality allows us to determine the name types to be selected for use during specific functions, most particularly when sending correspondence. For example, if you are sending an Admit letter to an applicant you may want to use the preferred first name in the salutation of the letter, but you want to use the formal name in the address portion of the letter and on the envelope. Name usage will allow these to vary. You can also specify the next name or names that should be used if the first name type specified by a name usage is not in the system (a cascade effect).

This section covers:

- Name type definitions
- Name prefix
- Name suffix
- Name parsing
- Entering and updating names
- Usage of search match capabilities

Name Types

Name types are translate values delivered by PeopleSoft. The delivered PeopleSoft values listed below will be used.

1. **Primary** – The primary name for a student will be the current legal name or official name known by the university as reported by the individual. Data loads from the Mentor Application process will populate this name type.
- **Preferred** – The preferred name for a student is the name used by CSUCI for personal contact, based largely on how the individual wants to be commonly identified (“nickname”). The Preferred name will reflect the way the person wants to be addressed. Typically this will mean removing the personal suffix and editing the First Name part to an informal version (such as replacing “William” with “Bill.”). (The delivered value cannot be modified, per PeopleSoft.)
 - **Diploma** – The name as it appears on the diploma.
 - **Other** –
 - **Former 1** -
 - **Former 2** -
 - **Other** -
 - **Advancement Preferred** -

Name Prefix

Personal prefix such as Mr., Mrs., Miss, Ms., or Dr. have been populated in the Prefix Table. Both Human Resources and Student Administration will use the prefix field for Primary only if known, otherwise, this field will remain blank.

System Setup: The following are the values determined for usage in the HRSA system.

Value	Description
Dr	Dr.
Miss	Miss
Mr	Mr.
Mrs	Mrs.
Ms	Ms.

Name Suffix

Personal suffixes such as Jr., Sr., II, III, or IV are included in the Last Name portion of all Name fields. The reason for this is so Human Resources can maintain an individual's legal name in the name field and so Student Administration can maintain a separation between personal and professional suffixes.

Example: First example is of an individual with only a family suffix, the second example is of an individual with only a professional suffix, and the third example is of an individual with both a family and a professional suffix.

Smith Jr. ,Michael D.	Suffix Field = (Blank)
Smith,Michael D.	Suffix Field = M.D.
Smith Jr. ,Michael D.	Suffix Field = M.D.

Note: The Chancellors Office maintains the Campus Community Name Suffix Table.

System Setup: The following are the values determined for usage in the HRSA system. The Suffix table is a prompt no edit field. This will allow for standardization amongst the common professional titles, however, allow flexibility when needed.

Suffix	Description
Esq	Esquire
MD	Doctor of Medicine
PhD	Doctor of Philosophy
I	First
II	Second
III	Third
IV	Fourth
V	Fifth
CPA	Certified Public Accountant
DC	Doctor of Chiropractic
DDS	Doctor of Dental Surgery
DMD	Doctor of Medical Dentistry
DVM	Doctor of Veterinary Medicine
EdD	Doctor of Education
JD	Juris Doctorate
Jr	Junior
OD	Doctor of Optometry
OMD	Doctor of Oriental Medicine
PE	Professional Engineer
RN	Registered Nurse
TTEE	Trustee
Sr	Senior

Entering and Updating Names

When a person is initially added to the database—whether through hiring, prospect, or applicant panels—a person's name is identified with a name type. The name entered at this point is the Primary name. The Names panel is also available for viewing all name types or updating.

Both the Human Resources and the Student Administration departments should maintain **effective dating standards**. The effective date used should be equivalent to the date the student and/or employee identified on the appropriate documentation used to make the necessary changes to the system. Changes are made by inserting a new effective dated row.

The following name format conventions are dictated by how PeopleSoft parses Primary name only.

If the person has a Jr., Sr., II, III or IV associated with his name, it must be entered as follows:

 Lastname Jr.

 Example: Smith Jr.

Personal Suffix Values (entered in the Last Name portion of the Name field)

Jr.	II
Sr.	III
	IV

If the person has two last names, the last name can be hyphenated.

 Example: Smith-Lake

If the person has two first names and no middle name, the first name can be hyphenated or put together without a space:

 Example: MaryJo or Mary-Jo

If the person has a single name only, it must be input as a last name and a period:

 Examples: Prince. or Madonna.

Section 2

Addresses

Addresses are categorized by “type.” Addresses have effective dates, making it possible to track changes for any address type over time. In addition to entering and maintaining a variety of addresses, it is possible to search for street and email addresses based on type.

Similar to name usage functionality, it is possible to set up address usage to define how to prioritize the selection of addresses for sending correspondence through the letter generation process.

PeopleSoft also offers the ability to store seasonal addresses with an attached address type. Rather than having an effective date, seasonal addresses have start and end dates attached to them.

It is possible to link an address for an individual to someone else in the database with whom the individual has a relationship, to an organization, or to a location address. This functionality allows two linked addresses to be updated, when one of them has been changed.

This section covers:

- Address type definitions
- Entering and updating addresses

Address Types

Based on the results of the campus community prototyping sessions, below are the current definitions for Address Types. They are a combination of delivered values from PeopleSoft and the Chancellors Office. The design of the Addresses panel is such that you select an Address Type, and then fill in the appropriate fields. Letter generation, which uses Address Usage and Address Types, can be used to send out email as well as letters.

Address Type Definitions

Below are the proposed address type definitions.

1. **Billing – [Student Only]** The address to which the Bursar's Office will send invoices. An address is only entered here if the billing address is different from the mailing address.
2. **Business – [Student Only]** The business address is the individual's place of work and associated phone number.
3. **Campus -**
4. **Diploma - [Student Only]**
5. **Dormitory – [Student Only]**
6. **Home – [HR Only]** **Home** is the current address as reported by the individual and the phone number at that location. HR/Payroll will use the **Home** address for W-2 and benefits mailings.
7. **Legal -**
8. **Mailing – [Student and HR]** **Mailing** is the address where the student's mail should be sent. Data loads from the Mentor and ISIR processes will update the **Mailing** address type. **Mailing** is the address of record that SA will use to mail or contact the individual. HR/Payroll will update the **Mailing** address if the individual has a different mailing address than their home address.
9. **On-Campus - [HR and Student]** On campus address for a student.
10. **Other –**

11. Other 2 -

12. Permanent – [Student] Permanent is the student's home address most likely their parent's address while attending school. If the student indicates a **Permanent** address on their admissions applications, the Mentor data load process will update this address type.

13. Preferred –

14. TDD/TYY -

15. Veteran –

16. Work –

Entering and Updating Addresses

In order to maintain consistent use of all addresses, we are recommending that the following format guidelines be followed.

Status	<p>Active – Historic, Current, and Future addresses will have an Active status unless the Current address is no longer valid (See Inactive).</p> <p>Inactive – Use Inactive when the Current address on record is no longer valid and there is no good address. Example: Mailings have been returned stamped “Return To Sender, No Forwarding Address”</p>
Address 1	<p>For <u>residential addresses</u>, street address with number. Should also include apartment number, room number, suite number, etc., as needed. Example: 123 Main St Apt 5</p> <p>For <u>business and CSUCI addresses</u>, group, department or division name. Example: Accounts Payable</p>
Address 2	<p>For <u>residential addresses</u>, Post Office Box number. Example: PO Box 3321</p> <p>Note: If a residential address has both street and PO Box information, put the delivery information in this field.</p> <p>For <u>CSUCI addresses</u>, building and room number.</p> <p>For <u>business addresses</u>, this line would be the name of the business. Example: ABC Corp.</p>
Address 3	<p>Delivery line address for <u>business addresses</u>.</p> <p>Example: 411 Monroe Ave</p>

Address 4	For <u>business addresses</u> , Post Office Box number. Example: PO Box 3321 Note: If a business address has both street and PO Box information; put the delivery information in this field.
City/Town1	City or town.
County/Town2	County. For students, this field will be used only for admissions prospects or applicants to statutory colleges.
State/Province	State for U.S. addresses. State or Province for international addresses.
Postal	Zip Code - plus four.

Field Usage for International Addresses

For international addresses, you simply follow the same steps for residential or business addresses. Any differences in address format do not effect which field the information is entered into. For example, a residential delivery line address, which has the house number following the street name, such as "Jubilaumstrasse 77," would still be entered in the Address 1 field.

When entering certain countries in the Country field, you will notice that the pull-down menu for St/Prov provides you with a list of choices for that country. The State_Names_Tbl includes delivered values for Canadian (CAN) territories, French (FRA) departments, United Kingdom (GBR) counties, German (DEU) Bundesland, and Australian (AUS) states. (Note: When you enter GBR for the United Kingdom under "Country" the "CNTY/Twn2" field becomes unavailable on the panel.) The Student Team will add military address values to the State_Names_Tbl.

When entering international addresses via the Personal Data 1 panel or through the Campus Community panels, one must enter the country before the state in order to have foreign provinces available to select (e.g., selecting Canada first allows one to see and select the appropriate Canadian province in the state field.)

NOTE: While PeopleSoft will support the use of international characters (e.g., è, ñ, ø, ä), these characters cause problems with some of the systems that are external to PeopleSoft but are dependant on PeopleSoft data. Until either the external systems are changed or the interfaces are rewritten we will not employ international characters.

Section 3

Phone Number Types

Phone numbers are categorized by “type.” Phone numbers are not effective dated.

This section covers:

- Phone number type definitions
- Entering and updating phone numbers

Phone Types

Based on the results of the campus community prototyping sessions, below are the current definitions for Phone Types. They are a combination of delivered values from PeopleSoft and the Chancellors Office. The design of the Addresses panel is such that you select an Address Type, and then fill in both an address and a phone number for that type. Letter generation, which uses Address Usage and Address Types, can be used to send out email as well as letters, which is why all Email Address Types must also exist as Address Types.

Phone Type Definitions

Below are the proposed phone type definitions.

1. **Business – [HR and Student]** The phone number associated with the individual's place of work.
2. **Cellular – [HR and Student]** Used as a phone type only; this type is used to record a personal cellular phone number.
3. **Fax - [HR and Student]** Used as phone types only. The Fax number from the Mentor application will update this phone type.
4. **Home – [HR and Student]** The Home phone number from the Mentor application will update this phone type.
5. **Mailing –**
6. **Main –**
7. **On-Campus - [HR and Student]** On campus phone number for a student or employee.
8. **Pager 1 – [HR and Student]** Used as phone types only. Pager 1 is the pager number for the individual.
9. **Pager 2 – [HR and Student]** Used as phone types only. Pager 2 is the second pager number for the individual.
10. **TDD/TYY –** Used as a phone type only.
11. **Telex -**

Entering and Updating Phone Numbers

Domestic phone numbers may be entered without any punctuation. The system will automatically format to “xxx/xxx-xxxx.” It is important that area codes be entered into the system as a part of the phone number. Example: 555/271-2262 versus xxx/271-2262.

International phone numbers should be entered with proper spaces and PeopleSoft will not reformat them.

The Extension field can hold up to a 6-character extension.

Section 4

Email Types

Email addresses are categorized by “type.” Email addresses are not effective dated. In addition to entering and maintaining a variety of addresses, it is possible to search for email addresses based on type.

Similar to name usage functionality, it is possible to set up address usage and email address usage to define how to prioritize the selection of addresses for sending correspondence through the letter generation process.

This section covers:

- Email address type definitions
- Entering and updating email addresses

Email Address Types

Based on the results of the campus community prototyping sessions, below are the current definitions for Email Address Types. They are a combination of delivered values from PeopleSoft and the Chancellors Office. In the column to the right of each type, is a notation of which offices will be using the type (H for HR/Payroll and S for Student). PeopleSoft warns that the three lists of types—address, phone, and email—need to be kept in synch with each other. Letter generation, which uses Address Usage and Address Types, can be used to send out email as well as letters, which is why all Email Address Types must also exist as Address Types.

Email Type Definitions

Below are the proposed Email type definitions.

1. **Business - Business** is the individual's place of work and associated phone number.
2. **Dorm -**
3. **Home** – Mentor data loads will update the **Home** email type.

The email address type of **Home** is a voluntary, self-service maintained email address type only.

4. **On Campus** – On campus email address.
5. **Other -**

CSUCI Standard Abbreviations for Common Address Elements

NAME	ABBREVIATION	NAME	ABBREVIATION
Avenue	Ave.	Orchard	Orch.
Boulevard	Blvd.	Parkway	Pky.
Bridge	Brg.	Place	Pl.
Brook	Brk.	Plaza	Plz.
Causeway	Cswy.	Road	Rd.
Center	Ctr.	Springs	Spgs.
Circle	Cir.	Square	Sq.
Corners	Cors.	Street	St.
Court	Ct.	Terrace	Ter.
Crossing	Xing.	Trail	Trl.
Drive	Dr.	Turnpike	Tpke.
Estate	Est.	Valley	Vly.
Expressway	Expy.	View	Vw.
Extension	Ext.	Village	Vlg.
Falls	Fls.		
Forest	Frst.		
Fork	Frk.		
Freeway	Fwy.		
Gardens	Gdns.		
Gateway	Gtwy.		
Grove	Grv.		
Harbor	Hbr.		
Heights	Hts.		
Highway	Hwy.		
Hollow	Holw.		
Junction	Jct.		
Lane	Ln.		
Manor	Mn.		

Secondary Unit Designators

Apartment	Apt.
Building	Bldg.
Department	Dept.
Floor	Fl.
Lobby	Lbby.
Office	Ofc.
Post Office Box	PO Box
Room	Rm.
Suite	Ste.

Standard U.S. Postal Service Abbreviations for Common Address Elements

We are not recommending strict adherence to US Postal Service standards, as they do not allow for the personalized and professional appearance we work to maintain.

Standard use of the following abbreviations would allow our data to be used to generate mailings that conform to US Post Service standards. In order to meet USPS standards, all address information would be input without punctuation (for example "123 Main St Apt 5", not "123 Main St., Apt. 5").

NAME	ABBREVIATION	NAME	ABBREVIATION
AVENUE	AVE	ORCHARD	ORCH
BOULEVARD	BLVD	PARKWAY	PKY
BRIDGE	BRG	PLACE	PL
BROOK	BRK	PLAZA	PLZ
CAUSEWAY	CSWY	ROAD	RD
CENTER	CTR	SPRINGS	SPGS
CIRCLE	CIR	SQUARE	SQ
CORNERS	CORS	STREET	ST
COURT	CT	TERRACE	TER
CROSSING	XING	TURNPIKE	TPKE
DRIVE	DR	TRAIL	TRL
ESTATE	EST	TURNPIKE	TPKE
EXPRESSWAY	EXPY	VALLEY	VLY
EXTENSION	EXT	VIEW	VW
FALLS	FLS	VILLAGE	VLG
FOREST	FRST		
FORK	FRK	SECONDARY UNIT DESIGNATORS	
FREEWAY	FWY	APARTMENT	APT
GARDENS	GDNS	BUILDING	BLDG
GATEWAY	GTWY	DEPARTMENT	DEPT
GROVE	GRV	FLOOR	FL
HARBOR	HBR	LOBBY	LBBY
HEIGHTS	HTS	OFFICE	OFC
HIGHWAY	HWY	ROOM	RM
HOLLOW	HOLW	SUITE	STE
JUNCTION	JCT		
LANE	LN		
MANOR	MN		

Section 5

Ethnic Group

Based on the results of the campus community prototyping sessions, below are the current definitions for Ethnic Group. They are a combination of delivered values from PeopleSoft and the Chancellors Office.

- 1 = White
- 2 = Black
- 3 = Hispanic
- 4 = Asian
- 5 = Native American Indian
- 6 = Unreported
- 9 = Pacific Islander and Native Hawaiian

Section 6

Ethnicity

Based on the results of the campus community prototyping sessions, below are the current definitions for Ethnicity. They are a combination of delivered values from PeopleSoft and the Chancellors Office.

Ethnic Cd	Ethnicity Descr
BLACK	Black
AFRAM	African American
ALEUT	Aleut
AMIND	American Indian
ASIAN	Asian/Pacific Islander
ASINDIAN	Asian Indian
CAMBOD	Cambodian
CENTAMER	Central American
CHINESE	Chinese
CUBAN	Cuban
ESKIMO	Eskimo
GUAMANIA	Guamanian
HAWAIIAN	Hawaiian
JAPANESE	Japanese
KOREAN	Korean
LAOTIAN	Laotian
MEXAMER	Mexican-Amer, Mexican, Chicano
PUERTOR	Puerto Rican
SAMOAN	Samoan
SOAMER	South American
SPANISH	Spanish
VIETNAME	Vietnamese
WHITE	White
ALASKAN	Alaskan Native
DECLINE	Decline to State
EUROPEAN	European
HAITIAN	Haitian

FILIPINO	Filipino
MALAYSIA	Malaysian
MIDEAST	Middle Easterner
NORESPON	No Response
NAFRICAN	North African
OTHRASN	Other Asian
OTHRBLK	Other Black
OTHRCAMI	Other Central American Indian
OTHLTHS	Other Latino, Hispanic
OTHRNWT	Other Non White
OTHRNAMI	Other North American Indian
OTHRPACI	Other Pacific Islander
OTHRSAI	Other South American Indian
OTHRSEAS	Other Southeast Asian
OTHRWHT	Other White
PAKISTAN	Pakistani
THAI	Thai
UNKNOWN	Unknown
HISPANIC	Hispanic
AMINALN	American Indian/Alaskan Native

Section 7

Citizenship Status

Based on the results of the campus community prototyping sessions, below are the current definitions for Citizenship Status. They are a combination of delivered values from PeopleSoft and the Chancellors Office.

- 1 – U.S. Citizen
- 3 – Non-U.S. Citizen Permanent
- 4 – Non-U.S. Citizen Temporary
- 5 - Refugee/Asylum
- 6 - Undocumented Alien
- 7 - Undetermined

Section 8

Data Load Search/Match

Home, Design Student Administration, Est. People Processing
Setup, Search/Match Criteria

Search Order No.	Use Online	Description	Blank Match	Compare Entire Field	Start	End	Length of Field
10	Yes	Social Security Number Only	Strict	National ID = Yes			20
20	Yes	First Name, Last Name, DOB	Strict	DOB = Yes Last Name = No First Name = No	1 1	10 10	30 30 10
30	Yes	Last Name, Date of Birth	Strict	DOB = Yes Last Name = No	1	10	30 10
40	Yes	First, Last, Address, City	Strict	Last Name = No First Name = No	1 1 1 1	10 30 30 30	30 30 55 30
50	Yes	First Name, Last Name			1 1	30 30	30

The Search/Match process should be performed before any Prospect, Applicant, Student, Employee, or Person loaded into the database and assigned an Empl. ID. The Load file is processed into a Suspense File; Guidelines are then established for each batch.