

Data custodianship Policy

The following conventions govern which office makes changes to student, parent, employee, vendor or alumni/donor General Person records (name, address, phone, fax, biographical) in Banner. They are listed in order of precedence.

***If the Person is . . .**

Then . . .

an Employee other than a Student Employee*	Human Resources makes the change
an Employee who is also a Student*	Human Resources make the change
an Employee who is an Alumnus/Donor*	Human Resources makes the change
an Employment Applicant and not a Student	Human Resources makes the change
a Student Employee who is paid cash	Appropriate Registrar's office makes the change
a Student Employee who is on a grant or other financial aid	Appropriate Registrar's office makes the change
a Student	Appropriate Registrar's office makes the change
a Student who is alum of another program	Current Registrar's office makes the change
a Student Applicant/Prospect	Appropriate Admission office makes the change
a Vendor	Purchasing/Accounts Payable makes the change
an Alumnus/Donor (Constituent)	Advancement/Development makes the change
a Parent of an enrolled Student**	Advancement/Development makes the change
a Parent of a graduated Student	Advancement/Development makes the change
a Corporation or Foundation (Organization)	Advancement/Development makes the change

Social Security Number changes will be made only by Human Resources for all Employees and by the appropriate Registrar's office or Financial Aid for Students.

*Note: Human Resources will always make corrections or additions to the General Person information if the person is an Employee (except if the person is a student employee with financial aid).

** The Parent record created by the Advancement office is maintained by Advancement. The Parent address on the Student's record (PA, P1, P2, P3, P4) is maintained by the appropriate Registrar's office.

ADDRESS TYPES

Banner permits multiple addresses to be entered for a person or vendor/organization. The use of each address type is strictly defined so that conflicts do not arise among the various functional areas (admission, registration, financial aid, accounts receivable, accounts payable, human resource, payroll, purchasing, advancement, etc.) Because name and address data are shared by all areas, procedures are needed to ensure areas make address changes only under certain conditions based upon the classification of the person or vendor. These address types should be used only for the purpose listed here and should not be used for any other purpose. If the need arises for a new address type, it may be added. It is also important to know the procedures of the custodial office before any addresses changes are made. This also refers to the related phone types.

Note: Refer to Data Custodianship Policy for the office that will change the address, *except for specific conditions listed below.*

AP – Accounts Payable. The Finance Office maintains this address for Vendors, including Employees, Students, Constituents, etc. if required.

BI – Student Billing. Address printed on statements. This address may be entered by the recruiting/admission offices, but it is maintained by the Bursar's office.

BU – Business. Primary address for Vendors, including Employees and Students if required; entered and maintained by Accounts Payable or Purchasing.

CA – Campus Address. Rollins campus box. The correct format for this address (as requested by the City of Winter Park Post Office and Rollins Post Office) is:

Rollins College
1000 Holt Ave – *nnnn*
Winter Park FL 32789-4499

It is used for faculty and staff (maintained by HR), and A&S/CPS students (maintained by Student Records or the Rollins PO).

Note: if campus box is used in any other address type, it should still follow this format.

CR – Community Relations Invitation. Used by Alumni/Development office.

CS – Post Rollins School i.e. Grad. Used by Alumni/Development for alumni who are away at graduate school but are still using their original PR address.

DP - Development's Permanent. Used by Institutional Advancement and Alumni /Development. Address of contact person who will always know where the alum is.

DR – Devl Physical. Used by Alumni/Development office.

EM - Emergency. The emergency address should be used only on the SPAEMRG form and not on the address page of SPAIDEN. This could be an address of an emergency contact who would not necessarily be at the permanent address or a parent address.

GR – Gift Receipt. Used by Advancement/Development office.

HQ – Corporate Headquarters. Used by Alumni/Development office.

JL – Job Location. Maintained by HR (or IT) only.

LK – Last Known. Last known Permanent address. Used when PR address is known to be no longer good and is marked Inactive. Used in Banner jobsub address hierarchies.

LO – Local Address. Local mailing address for off-campus A&S/CPS students. Crummer uses this for their first billing address.

MA – Mailing Address. This mailing address is used by recruiting/admissions offices for prospective students who live away from their permanent address (*e.g.* at boarding school or another college). It should **not** be used once a student is matriculated. It may also be used by the Dean's offices for incoming Faculty. It should **not** be used once the Faculty is on campus.

OF – Office (HR use only). Maintained by HR only. This is the building and room location for Rollins employees only, for use in the campus directory.

Parent addresses are typically used for A&S/CPS students only. A student may have any combination of these addresses. When a mailing to parents is requested, the hierarchy used is 1- PA, 2- P1 and 3- PR. Separate queries are then run for P2 and for P3.

PA - Parents - traditional.

P1 - Parent 1 - custodial.

P2 - Parent 2 - non-custodial.

P3 - Parent 3 - guardian. Legal guardian of student, including any non-parent relative. Also used if student's parents are separated and have joint custody.

P4 - Parent 4 - other. If the student lives at a separate address from parents and parents do not live with each other, P4 is used for the other parent.

PR – Permanent. Every person should have an active permanent address. For a student, this is her or his permanent residence. It can be different from the parents' address. The permanent address is maintained according to the data custodianship guidelines. *A permanent address should never be marked "Inactive" without adding a new permanent address. See LK above.*

RH – Residence Hall. Maintained by Residential Life only.

RO – Regional Office. Used by Alumni/Development.

SA - Sabbatical. Used by HR for faculty who are on sabbatical.

SB - Spouse Business. Used by Institutional Advancement and Alumni/Development.

SE / S2 / S3 – Seasonal. Must be used with the From and To dates. Used primarily by Alumni/Development.

WA / W1 / W2 / W3 – Work/Employer Additional. Used by Alumni/Development.

WK – Work/Employer. Place of employment for students (typically, non-traditional students) to be used as a daytime point-of-contact. Also used by Institutional Advancement and Alumni/Development. Every effort should be made to enter a complete address when possible.