

**Student  
Information Systems**



**CORE  
Module**

**Procedure Manual**



# South Dakota Colleague System Procedures

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# South Dakota Colleague System Procedures

## Revisions with this Update

**3/31** – update to *Recording a Verified Death*

**9/15/2013** – update to *Entering Veteran's Information*

**9/15/2013** – update to *Entering Emergency and Immunization Information*

**9/15/2013** – added *Entering PERSON Health Information*

# South Dakota Colleague System Procedures

## **PREFACE**

# South Dakota Colleague System Procedures

## Colleague System Instructions

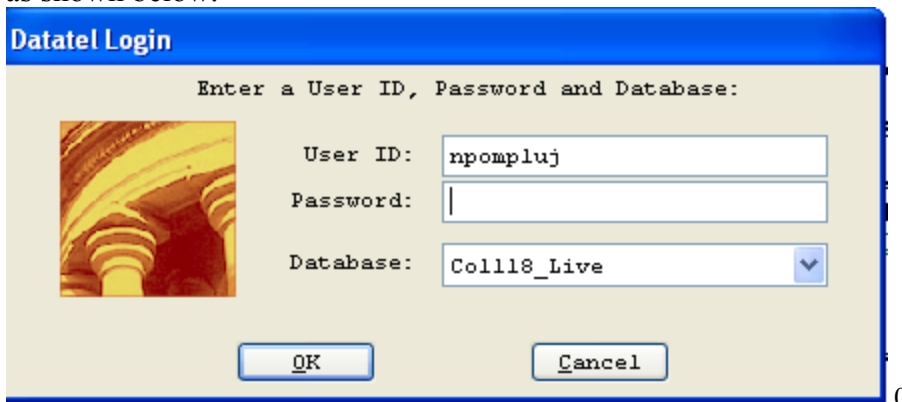
Responsibility: University

Colleague Access

### Accessing Colleague from Windows

- Select the **START** button on the taskbar.
  - Select **PROGRAMS** from the start menu.
  - Select **DATATEL** from the **PROGRAMS** options.
  - Select **UI Desktop** from the **DATATEL** options.
- or
- Select the desktop **Datatel** icon.

A wIntegrate screen will display briefly followed by the Colleague Logon screen as shown below.



### Logging On/Off & Changing Password

- Enter your Colleague ID in lower case letters at the login prompt and press enter.
- Enter the password at the password prompt. See the Rules for Password section of the document for changing passwords.

If either the login ID or login password is entered incorrectly, the login prompt will re-display. After 3 unsuccessful tries, the login ID will be locked and must be reset. Send an email to **your university system administrator**.

**Select Coll18\_Live for the Production Account or Coll18\_Test for the Test Account.**

Click on OK.

# South Dakota Colleague System Procedures

## Change Password

- Select the **START** button on the taskbar.
  - Select **PROGRAMS** from the start menu.
  - Select **DATATEL** from the **PROGRAMS** options.
  - Select **DATATEL Terminal** from the **COMMUNICATIONS** options.
- or
- Select the desktop **Datatel Terminal** icon.

The following screen will be displayed for the change of password.

<p>Main Menu</p> <ol style="list-style-type: none"><li>1. Live Account</li><li>2. Change Password</li><li>3. Log Off</li></ol> <p>Enter your selection[1-10]: 2</p> <p>Changing password for "userid"</p> <p>userid's Old password:</p> <p>userid's New password:</p> <p>Enter the new password again:</p>
--

- Enter userid's old password
- Enter userid's new password
- Re-enter userid's new password

A message will display confirming that the password has been changed.



# South Dakota Colleague System Procedures

## Rules for passwords are:

- a) The password must be a minimum of six characters long.
- b) The password must contain two characters and two numbers.
- c) The password must have two alpha/numeric characters not in the previous password.
- d) The password can not have more than two repeating characters.
- e) The password only recognizes the first eight characters, but a password can contain 256 characters.
- f) Passwords can not contain these characters: ( ) \* ? < > / ; & ! [ ] { } | \$ \ ' " )
- g) The password is case sensitive.

## Password Change Requirements

- a) Users will be required to change password every 20 weeks. After the 18<sup>th</sup> week, users will be notified that their password will need to be changed soon. They will then have those two weeks plus an additional two weeks grace period to make that change. Total time lapse for a password is 20 weeks.
- b) The account will be locked if no change is made to a password after the grace period. To reset the account, send an email to **your university system administrator**.
- c) When a user is requested to change password upon login to Colleague, they **MUST** do so. Failure to comply will result in being locked out of the system after the fifth try. However, while trying to change password, the user is given several tries to meet the password criteria until they are successful. If the user gets locked out, send an email to **your university system administrator** to have the ID reset.
- d) When a user receives the message to change their password, they will have 60 seconds to begin typing before they are disconnected – but not locked out.
- e) Passwords cannot be reused immediately. There is a 26-week wait period before a password can be recycled. Even then, the password cannot have been used within the last two iterations.

If you are successful logging in, you will get the message screen with the “PRESS ENTER TO CONTINUE” message at the bottom. A small ‘loading’ message will flash on the screen before you get the ‘Datatel – Colleague’ screen.

# South Dakota Colleague System Procedures

## Options on the very top row:



To start a new session, click on **File**, then **New Session**, then **Current Account** to stay in the same account (Live or Test) or **New Account** to open a session in the opposite account.

To change the application, click on **Apps**, check the application wanted: ST is the student application and most users will not need to use another application.

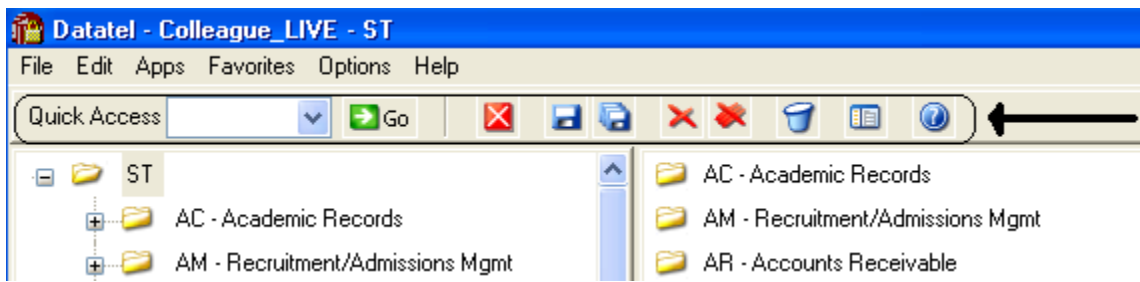
If you use a few screens often and want them on a separate list, click on **Favorites**, then **Add to Favorites**, then type in the mnemonic of the screen and click OK.

To change the font or colors on your screens/reports, click on **Options**, then **Font** or **Change Colors**.

To be able to scroll back to see output on the screen from paragraphs run from a user menu (to see list of menus, click on NCCR, then XNSU), click on **Options**, then **Show UI Console**. A Datatel UI Console window will appear on the screen. Enter the menu name on the Datatel-Colleague main screen. Answers to the prompts can be entered on Datatel – Colleague main screen or in the Send to Host box at the bottom of the Show UI Console window. To view output on the screen, use the scroll up or down buttons at the right on the Show UI Console window.

# South Dakota Colleague System Procedures

## Options on the Second Row:



If you know the name of the screen you want to access, type in the mnemonic in the **Quick Access** box and click **Go**. The drop down box in the Quick Access box will contain the mnemonics you have used previously.

If you are updating records and have not detailed to another screen, click on the **Single Disk** (or pressing F10) to update the current screen and retain the same screen to select a new record. If you have detailed to another screen, click on the **Single Disk** (press F10) to update the current screen and return to the screen from which you detailed. If you have detailed down to additional screens and wish to update all the fields that you have changed on all the screens and return to the menu, click on the **Multiple Disks**.

If you have looked at a screen without detailing down and do not want to make any updates but want to look at other records on the same screen, click on the **Red Diagonal with a Single Cross Diagonal** (or pressing F8). If you have detailed down and you do not wish to update the fields on the current screen (and any screens you detailed from to get to the current screen) and return to the menu, click on the **Red Diagonal with a Multiple Cross Diagonals**. **Warning**. If you click the Red multiple Cross Diagonals, none of the changes you made on any screen you detailed from will be saved.

**Wastebasket** (Shift-F10) is for deleting entire records. Clicking on the **Menu** when on a screen turns on (off) the menu display on left side of screen. To see the Field Help for the field where the cursor is, click the **Blue Circle with a ? (F1)** inside.

## Menu



To expand the menu on the left side of the screen to see submenu(s), click on the Plus sign (+). To remove submenus, click the Minus sign (-).

To access a screen without typing the mnemonic, click on a screen name that does not have a plus (+) or a minus (-) in front.

# South Dakota Colleague System Procedures

To see a list of screens that you have added to **Favorites** (see above), expand the Favorites Menu by clicking on the Plus sign in front of Favorites. This will enable you to display a customized menu of screen names.

## **Detail Screens**

Screen mnemonics display at the top of left hand corner. To move to a new field, use the mouse to point and click on the new field.

Multiple value fields will have a box with a number at the left of the data.

A box with bright colors to the right of the data indicate that you can drill down to a detail screen by clicking on the box or by pressing F2. Do not drill down from a Comment screen. If, however, you drill down from a Comment screen, you will be taken to an editor. To return to the Comment screen, enter 'fi' at the bottom.

The names of the screens that you have drilled through will display at the top. You can look at one of those screens by clicking on it; however, you will not be able to update it unless you cancel (clicking on the single red X box in the 2<sup>nd</sup> top row or pressing F2) or finish out (clicking on single black X box in the 2<sup>nd</sup> top row or pressing F9) of the screens that you detailed to.

Fields with a box at the right with a 'V' have Validation Codes associated with the field. To see a list of valid codes, click on the box. To select a value, click on the item in the list.

If you enter 3 dots (...) in a field that has table values associated, the table will be displayed. To select a value, type in the number associated with the list and press enter OR check the box (or boxes to populate multiple values in a multiple valued field) to the left of the number and click on the disk at the bottom of the screen.

Fields with 2 small rectangles with an up arrow in the top rectangle and a down arrow in the bottom rectangle allow you to scroll through the fields by clicking on the up or down arrow. Right click on the up or down arrow for a drop down box allowing you to select from a list of options.

Fields with a box with a calendar are date fields. You can select a date from a calendar by clicking of the box and clicking on a day on the calendar. When the calendar is displayed, you can change the month by clicking the single 'less than (<)' or 'greater than (>)' symbol; to change the year, click the double less than (<<) or greater than (>>) symbols.

To copy the value in a field highlight the field, press Ctrl C; to paste that value in another field, highlight the new field and press Ctrl V. Alternatively, highlight value to copy, click Edit, click Copy, highlight the new field, click Edit, click Paste.

## **Date and Time Stamp**

Put the cursor is in the Comment field, click on Edit, then click on Date/Time/Login Stamp

# South Dakota Colleague System Procedures

## **To view a report**

Output from processes (ie EVAL) or reports on UTFB will be displayed in a report browser. To scroll through the current page, use the scroll bar at the right side. To go to a new page, press the Left or Right Arrow (Page Down, Page UP). The rightmost Printer is used to print to a printer that has been defined to Colleague.

## **Function keys**

**F1 → Field Help** provides on-line short help specific to the field in which the cursor is positioned.

**F1 Enter → Field Help** provides a longer on-line, detailed help messages specific to the field in which the cursor is positioned

**Shift F1 → Process HELP** gives an overview of a process, explaining its basic function and its relation to other processes

**F2 → DETAIL** moves to different screens and is used when there is box to the right of the screen indicating that drill down screen(s) are available.

**Shift F2 → Funct HELP (Fkey HELP)** displays the layout of function key assignments for keyboard.

**Shift F8 → Direct Acc** cancels the updates made on the screen and returns to the previous screen

**F9 → FINISH** saves new data entered and takes you back to the previous screen or menu

**Shift F9 →FINISH** same as F9

### QUICK TIPS

- ✧ To display the last person, term, section, etc.. displayed use @ on the command line.
- ✧ To display a list of table values when the cursor is on the command line type "...".
- ✧ Always Cancel from a screen you are not updating. Caution: Changes made on a drill down screen will not be saved when you cancel from the current screen.

# South Dakota Colleague System Procedures

## Search Procedures

Student searches may be completed in several ways:

- Student Social Security Number
- Student Colleague ID
- Exact Student Name
- Student Name by Sound

### Student Social Security Number Search

- ◆ To begin a record search, first use the social security number if available. Check the name and birth date to confirm a match of the record for which you are searching.

### Student Colleague ID Search

- ◆ Colleague ID, a 7 digit unique ID assigned by Colleague, can also be used for a person search. Again, check the name and birth date to confirm a match of the record for which you are searching

### Name Search

Name searches will display a resolution screen listing all people meeting the name search criteria. Select the desired record by using the sequence number.

#### **Exact Name Search**

A name search can be done in three ways: “First Name” (space) “Last Name”; “Last Name”, “First Name”; or “Last Name” only. It is also permissible to use only part of the first or last name for a broader name search. \*\* You must use a minimum of three characters when doing a partial name search.

When searching for a name with spaces, use the underscore key “\_” to identify the position(s) in the name where the spaces are located. Example: Terrance Van Den Hemmel would be searched for by entering “Terrence Van\_Den\_Hemmel” or “Van\_Den\_Hemmel, Terrance”.

When searching for a name with an apostrophe or a hyphen, leave the apostrophe or the hyphen in the name search. Example: Bruce O’Neil would be searched for by entering “Bruce O’Neil” or “O’Neil, Bruce”, Marge Wilson-Hart would be searched for by entering “Marge Wilson-Hart” or “Wilson-Hart, Marge”. The name search will also find Marge by using either part of her hyphenated last name. Example: “Wilson, Marge” or “Hart, Marge”.

#### **Phonetic Name Search**

If social security number search and name search (full and partial) fail to yield a result, use the soundex option. This option will search for a last name by “the way it sounds”. At the lookup prompt, type in “/” before typing in the phonetic spelling of the last name. This does a broad search by the sound of the last name, but it is not as reliable as the other search options.

The name search will search records based on the “Name LFM” and “Other LFM” fields. The name search will not search records based on the “Pref Name” or “Mail Name” fields. All possible record matches are displayed on the “person resolution” screen by preferred name.

When a list of possible records is found on the “person resolution” screen, check the social security number, birth date, entry date, and address to confirm a match of the record for which you are searching.

## Other Searches

### Course or Section Search

Enter XXXX-000-00

Where: XXXX is the prefix for the course (i.e.: BIOL)

# South Dakota Colleague System Procedures

000 is the course number (i.e: 101)

00 is the section number with the university identifier(i.e.:x 01)

Example: BIOL-101-D01

If the section number is not provided, a resolution screen will be displayed for the selection of the correct section.

## **Term Search**

Enter YYYYTT (i.e.: 1998FA)

Where: YYYY is the year in which the term actually occurs (i.e.: 1998)

TT is the term

(i.e. FA = Fall , SP = Spring, SU = Summer)

## **Restricted lookup by Topic Code**

- At the resolution screen, enter S to select sections by Topic Code (or another value on the section)
- At the SSELECT COURSE.SECTIONS BY @ID: prompt, enter the selection criteria
  - For example, WITH SEC.TOPIC.CODE EQ 'USDSU' will bring back the sections only offered at SDPURC

## **Restricted lookup for open sections**

Search for open sections by entering S at the section resolution screen from RGN, then type WITH SEC.AVAIL.STATUS EQ 'Open' and return.

# South Dakota Colleague System Procedures

## Record Search Overview

Responsibility: University

## LookUp Selection Options

The LookUp Processor gives you full query-language selection capabilities along with full data field and record security. Many of the selection options available with LookUp are similar to using database management query language and retrieval. See your system administrator if you need assistance using any of these options.

You may enter one of the following at the LookUp prompt:

- \* the actual ID
- \* [**@**] to display the last record filed
- \* [...] to view all IDs you may access
- \* [**ABC...**] to select all IDs that begin with ABC
- \* [**...ABC**] to select all IDs that end with ABC
- \* [**...ABC...**] to select all IDs that contain the characters ABC
- \* [**ABC...XYZ**] to select all IDs that begin with ABC and end with XYZ
- \* [**;**] to display all available dictionary elements for this file
- \* [**;**]dictname to 1) Select all IDs with a value for this dictionary element or 2) If dictname is an indexed field, to display a resolution screen showing all the values indexed for this dictname. For example, you might enter ";SCHOOLS.DEPTS" at the Schools LookUp prompt to find all the schools in your institution associated with one or more departments.
- \* [**;**]dictname datavalue to select all IDs with a value like the datavalue for this dictionary element. For example, you might enter ";SCHOOLS.DEPTS MATH" at the Schools LookUp prompt to find all the schools in your institution associated with the math department.
- \* [**;**]dictname operand datavalue to select all IDs whose value of dictname matches the operand and datavalue(s). A datavalue may be any string containing alphanumeric characters or ellipsis (...). For example, you might enter ";SCHOOLS.DEPTS NE MATH" at the Schools LookUp prompt to find all the schools in your institution not associated with the math department.

Valid operands are:

- \* [**=**] or [**EQ**] (Equal)
- \* [**<>**] or [**NE**] (NOT Equal)
- \* [**>**] or [**GT**] (Greater Than)
- \* [**>=**] or [**GE**] (Greater or Equal)
- \* [**<**] or [**LT**] (Less Than)
- \* [**<=**] or [**LE**] (Less or Equal)
- \* [**MATCHES**]
- \* [**LIKE**]
- \* [**UNLIKE**]



# South Dakota Colleague System Procedures

## Record Lookup

There are various types of records created in Colleague. Person or Organization records, records for courses and course sections, academic credentials, positions, benefits, general ledger accounts, and purchase orders are just a few of the types of records created throughout Colleague. Generally speaking, once these records are created, information pertaining to them can be changed or deleted but the actual person or organization record will always remain. For example if you create a course record for ENGL-1234, once saved, you can change the credits, academic level, title, CIP codes, etc., but you can't change the name to ENGL-2345. Similarly, if you create a person record for Bob Smith and save the record you can later change his address, phone number, birth date or even his social security number but you can't delete Bob Smith's record. The following are steps, or procedures, for searching records:

### Person/Organization Lookup

The person/organization record is the more difficult record to find since you are relying on two variables. First is that the person providing the information was honest in presenting the demographic facts and secondly that the data entry person was accurate in entering in data. On occasion, you will find that people provide incorrect information or even falsify data. This is commonly seen when people can't quite remember their social security number so they provide one that is close. Secondly, data entry staff are only human so honest mistakes do occur when they try to read scribbled handwriting on a form. Regardless of how inaccurate data got into the system, front-end staff must carefully check for those eventualities before adding new records.

The following step-by-step process is for looking up records as well as an explanation of the reason for the process:

1. **Enter first two letters of first name and first three letters of the last name** - (You can also enter Smi, J and Colleague uses the comma to designate last, first). Although this option will bring more records than spelling the entire name out, it helps locate records with incorrect or slightly different spellings. If you chose to enter the entire name you would certainly get a smaller group of records to look through but you also have a greater chance of missing duplicates.

#### **IF YOU HAVE NO MATCH:**

2. **Enter the Social Security Number** - Although you may not see the need to use this option after a name lookup does not pull a match, some students may have been using the wrong number or you may find a conflict with the number. Since the social security number is a unique identifier, we want to ensure that we have the correct number associated with that person.

# South Dakota Colleague System Procedures

## **IF YOU HAVE A NAME WITH UNUSUAL SPELLINGS:**

3. **Try a Soundex lookup-** in some situations you may encounter names that have several common spellings or that you have difficulty in determining proper spelling. By using a Soundex lookup you will find occurrences that don't match the spelling but sound like the name you are searching for. To look a name up using Soundex, at the Person Look Up type: /erdlika, ray (actual name searching for is: Hrdlicka, Raymond).

**Use the data elements on the resolution screen to verify that the right person is selected. Also check to see if two records look similar. Remember that the system will allow entry of the same person twice (except for the social security number). If the birth date and the address are the same, it may indicate that there is a duplicate. If the record is truly a duplicate, follow the procedure in the final section of this document to consolidate the record into one.**

### **\*\* POINTS TO REMEMBER \*\***

- 1) If the person whose name is being entered goes by another name or a nickname, that person's name may not be found unless the other name has been entered on NAE as an "Other Name" or a nickname has been entered on the BIO (Biographic Information) screen. It is really a judgment call when entering a person's name and deciding whether or not that name is the person's legal or other name. However, the Human Resources/Payroll office will have the legal names of employees.

EXAMPLE: The end-user has an application to enter and they are using the APPN screen. The name on the application is Jimmy Stern. James Stern was entered previously as a prospect on the XPRS screen. The end-user enters Jimmy Stern at the Person Lookup and the record is not found. They also do a partial name lookup of Ji St and the record is not found. Using the first initial of "J" would have found the name James Stern.

EXAMPLE: Buck Stern was entered on the XPRS screen as that is the name he had put on a Prospect card from a High School Fair. His application is now in the Admissions office with James R. Stern entered on the application. James R. Stern would not be found in a Person Lookup as Buck Stern had been entered as a prospect. An alternate lookup would be to type the last name "Stern" only.

- 2) The "Preferred Name" field is a default from the entry in the "Last", "First", "Middle" field at the top of the NAE screen. If one name only is entered in the "Preferred Name" field then LookUp for that person would be the first name only. For example: Rachel Briggs goes by "Sammy" Briggs. Sammy only is entered in the "Preferred Name" field. A data entry person goes to look up Sammy Briggs and that name is not found.

**RECOMMENDATION:** Leave the "Preferred Name" as it appears after entry in the Last, First, Middle fields and enter the other name in the

# South Dakota Colleague System Procedures

“Nickname” field on the Biographic Information (BIO) screen. *This screen can be accessed by detailing on the Last, First, Middle name field on NAE.*

## Other Records Lookup

Since there are fewer opportunities for spelling errors and the format for naming is usually very structured, other record lookups tend to be more straightforward. However just as with person records, it is important to follow consistent steps when searching before adding records. Following is a step-by-step process for looking up records:

1. **Enter a partial lookup** - Once again this option will bring back additional records that will require you to look through more resolution items but it helps ensure that the record you wish to enter doesn't exist in a similar form. On some lookup screens you may be required to enter complete pieces such as with courses (on CRSE you need to enter the full subject name ie., ENGL).
2. **Use (...) as a wild card lookup** – Looking for a group of records that fit a specific criteria can be done by using ... For example, looking up a GL number with the numbers “1150” in the middle you can type ...1150... at the lookup prompt. Only those numbers with 1150 will appear on the resolution screen. This applies as well by typing ... at the beginning or at the end of the lookup. For example, in searching for positions that end in ADJ you would type ...ADJ or searching for all departments that begin like EN you would type EN...

## Individual and Corporation Record Relationship

### **\*\*CAUTION\*\***

In Colleague, the system maintains a **unique distinction for individuals and corporations**. When you enter a person on NAE, APPN, FCTY or FACL, the system creates a record in the PERSON file. Likewise, when an organization is created on ORGP, a record is created in the CORP.FOUNDS file. The concern arises when lookups are done on a screen earmarked for the other (calling up University of Sioux Falls on NAE or Mary Smith on ORGP). Colleague gives you a message similar to the one below. If you save out the screen, the record will be moved to the other ‘domain’. In other words, an organization record could be converted to a PERSON record or a PERSON record could be converted to a CORP.FOUNDS record.

**If you have update access to the screen and receive a ‘Warning! This record will be marked as a person if updated’ message, you must:**

- Click OK to release the warning message.
- Cancel out of the screen without making any changes by clicking on the single or triple X, clicking on File and Cancel or using Shift -> F8 and hit Enter.

## South Dakota Colleague System Procedures

- If you want to access the record, go to ORGP (corporations) or NAE (individuals).

If you accidentally make the change you can return the record to the correct domain by calling up the record on the appropriate screen.

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## **Flagging records on a resolution screen**

For ease in data entry, Colleague allows you to flag either all records on a resolution screen or certain records on a resolution screen. To flag certain records, enter F on the resolution screen, then enter the number of the item you wish to flag. To flag all records, enter F ALL on the resolution screen. Notice all records have an asterisk next to them. You can do a sort/select option before the F ALL to narrow the resolution screen down.

# South Dakota Colleague System Procedures

## **Using a savedlist to process large numbers of records**

- At the person lookup prompt, enter @SELECT
- The Primary Selection Criteria (PSC) screen is displayed
  - Enter the savelist list name
- Update to process the records
  - Enter @@ or \$ at the LookUp prompt to retrieve/view the first selected record, etc
- To deactivate your list, enter @SELECT at the LookUp prompt
  - Save or clear the list

# South Dakota Colleague System Procedures

## **DEFAULT SETTINGS AND PARAMETERS**

# South Dakota Colleague System Procedures

## Defining Default Word Processor Settings

Responsibility: DA Group

Use the Communication Management (PID7) parameter screen to define the default settings for using a word processor with the Communications Management module.

### Step 1 – Access the Communication Management (PID7) default screen

### Step 2 – Enter the Default Letter Format

- Enter a code for the default acknowledgment letter format to use.

### Step 3 – Enter the Detail From Window to Editor Subroutine

- Enter the subroutine that is called when an end user presses F2 to go to the editor

### Step 4 – Enter the Word Processor menu execution command

- Enter the command that runs when end users select the Word Processing menu.

### Step 5 – Enter the Word Processor Version Number

- Needs to be 8 or higher in order to use WINTEG.WORD in CC

### Step 6 – Enter the Type of Email to Process in CC

- Enter PRI for the Primary Email address type

### Step 7 – Enter the Default Batch Print Maximum

- Enter the maximum number of documents to be processed per print batch

### Step 8 – Enter the Default File Suite Processing Year

### Step 9 – Update the PID7 screen



# South Dakota Colleague System Procedures

## **Defining FTP and Kermit Locations**

Responsibility: DA Group

You can specify the locations of your file transfer protocol (FTP) and kermit processes. These are the processes that your institution uses to transfer files between it and another site.

Use the FTP/Kermit File Locations (PID4) screen to specify the locations to the executable code for your FTP and kermit processes.

**Step 1 – Access the FTP/Kermit File Locations (PID4) screen**

**Step 2 – Enter the FTP Location and File Name**

**Step 3 – Enter the Kermit Location and File Name**

**Step 4 – Enter the FTP Path Adjustment**

- Enter the portion of the absolute file path that needs to be ignored for ftp

**Step 5 – Update the PID4 screen**

# South Dakota Colleague System Procedures

## **Specifying International Parameters and Defaults**

Responsibility: DA Group

Use the International Parameter (INTL) and International Defaults (PID1) screens to define parameters for dates and field labels.

### **Step 1 – Access the International Defaults (PID1) screen**

#### **Step 2 – Define the Zip/Postal Code Text String**

- Enter the zip or postal code field label that you want to display on screens
- If you enter a label, it will appear throughout Colleague

### **Step 3 –Leave the Social ID Number Validation Subroutine blank**

#### **Step 4 – Define the Social ID Number Text String**

- Enter the screen label text for social ID numbers
- If you enter a label, it will appear throughout Colleague

### **Step 5 – Define the State/Province/Regional Unit Text String**

- Enter ST

### **Step 6 – Define the City-State-Zip or Equivalent Text String**

- Enter the screen label for City-State-Zip or equivalent
- If you enter a label, it will appear throughout Colleague

### **Step 7 –Leave the Employer Tax No Validation Subroutine blank**

#### **Step 8 – Define the Employer Tax Number Text String**

- Enter the text string to label employer tax number fields
- If you enter a label, it will appear throughout Colleague

### **Step 9 – Define the Alien or Landed Immigrant Text String**

- Enter the text used for Alien or Landed Immigrant text on the FINF screen

### **Step 10 – Update the PID1 screen**

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## Defining Record ID and LookUp Parameters

Responsibility: DA Group

**WARNING:** Most of these parameters were defined when your software was installed. Use caution when making any subsequent changes to these parameters.

Complete the following steps to define record ID and LookUp parameters.

### Step 1 - Review the system's existing record ID and LookUp parameters.

- See the installation procedures for more information about these parameters.

### Step 2 - Access the ID and LookUp Parameters (PID2) screen and define the following fields

- Person/Organization ID's Assigned
  - Enter A – Automatic Only
- Default Indexing to use for LookUp
  - Enter P – Partial Name
- Fixed Length for Person LookUp
  - Enter 7
- Fixed Length for Organization LookUp
  - Enter 7
- Host Organization ID
  - Enter South Dakota Board of Regents
- Mail Label Name Width
  - Enter 35
- Update Activity Counters in Batch
  - Enter Y
- Default Campus Calendar
  - Create a “Main” calendar on CMPC with multiple years noting the Holidays.
  - If you setup the “Main” calendar, you wouldn't need to attach it to RYAT at all.
  - Prior to F'03, the calendar on PID2 isn't being used because we are setting up calendars and linking them on RYAT.
  - Enter the “Main” calendar on PID2.
  - Once those dates are finished/past, go back to CMPC and change the dates.
  - What the default calendar does is, when you go to SOFF, it looks at the campus default calendar on PID2 for the holidays.
- Fixed Length for PIN
  - Enter 6
- Single Hit Adr Res
  - Enter No
  - If Yes is entered, HOUSEHOLDING occurs. SD does not HOUSEHOLD addresses.

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**Step 4 – Update the PID2 screen.**

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## Defining Capitalization Rules

Responsibility: DA Group

Use the Capitalization Rules (PID3) screen to define capitalization and word substitution parameters.

### Step 1 – Access the Capitalization Rules (PID3) screen

### Step 2 – Define Word/Substitute rules

- Enter the word that will have an associated substitute
- For example, Court/Ct

NOTE: To override the Capitalization Rule such as a person with a last name of Court, type the equal (=) sign before typing the name and then type the name as you want it to be stored. Colleague will make the last name Ct if you do not use the = sign.

### Step 3 – Define Convert to Upper Case rules

- Enter the words that will always be converted to upper case
- Enter the words that will always be converted to lower case
- Enter the word that will have the word that follows it in upper case
- Enter the prefix that will have the first letter of the word following upper case
- Enter the delimiter that has the letter following converted to upper case

### Step 4 – Define Not Converted to Upper Case rules

- Enter the suffix that will be upper/lower after numbers like 1st and 2<sup>nd</sup>
- Enter words that have a prefix like NOCAPS.PREFIXES but should not have upper case

### Step 5 – Update the PID3 screen

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## **RULES AND CODES**

# South Dakota Colleague System Procedures

## Building Rules

Responsibility: University/DA Group

Follow the procedure described below to build a rule.

**Step 1 - Read “Understanding Rules” at [clients.datatel.com](http://clients.datatel.com).**

**Step 2 - Define your requirements and identify your necessary business rules.**

**Step 3 - Access the Rules Definition (RLDE) screen.**

- You can access this screen directly if you want to create rules before assigning them.
- If you want to create rules as you are assigning them, you can access this screen from the module-specific screen in which you are assigning rules.

**Step 4 - Add a rule.**

**Note:** Naming convention is university or common -> module -> name

- At the Rule LookUp prompt, enter a new rule name.
- Enter **A** to add the rule.
- If you enter the name of an existing rule, the screen displays information about that rule.

**Note:** Universities will want to incorporate university specific selection criteria into most rules. For example, CS or TA location for FA rules or university specific programs for AR rules.

**Step 5 - Complete the RLDE screen.**

Description

- Enter a description for this rule

Office Code

- To create a rule for use only by a specific office, enter an office code in the Office Code field.

Primary File View

- Enter the file used for the primary view of data in the database

Comments

- Enter any comments

Subroutine Name

- Enter the name of a subroutine this rule calls

Rule Failure Message

- Enter the message to display if this rule fails

Checking Criteria

- Enter the criteria used in this rule
- If you want this rule to evaluate a data element that is stored in a file other than the primary file, access the Rules Definition Detail (RLDT) screen as a

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detail screen from the appropriate row of the Connector field (on the RLDE screen.)

- Use the RLDT screen to define how to access the data element through a pointer from the primary file.

**Step 6 - Save the record.**



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## Validating Rules

Responsibility: University/DA Group

Follow the procedure described to validate a rule.

### Step 1 - Access the Rules Test and Debug (RLTD) screen.

- After creating a rule or when using a rule with which you are unfamiliar, directly access the RLTD screen to test it.

### Step 2 - Retrieve the rule.

- At the Rule LookUp prompt, enter the name of the rule that you want to validate.

### Step 3 - Complete the RLTD screen.

- When testing a rule, you must have records in mind that you know will either pass or fail the rule criteria.
- It is a good idea to test a rule for both success and failure conditions before assuming that the rule works.
- Define the following fields
  - Enter Y/N to Use UT Debug
    - If you enter Y, the data that prints on the screen are things such as records read, dictionary items read, flags used and returned, subroutine arguments, and some chronological data to tell you where in the logic the program currently is.
  - Enter the Default Year if this is a file suite based rule
  - Enter a Record ID
    - Enter a record key from the file identified in the rule

### Step 4 - Evaluate the rule test results.

- If the rule contains errors, return the RLDE screen to correct them.

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## Defining a Validation Code

Responsibility: DA Group

Complete the following steps to define any code tables you will need to implement the Student System at your institution:

### **IMPORTANT!**

To define or modify Core validation code tables, you must enter **core** from the *DBMS prompt* (Core codes are stored in the CORE.VALCODES file). If you enter VAL from the Student System main menu, or any menu in the Student System, you will access *only* the Student System validation codes (ST.VALCODES).

**Step 1 - Complete the steps outlined in “Before You Begin” at clients.datatel.com.**

**Step 2 - Enter VAL at any menu prompt.**

- The Validation Codes screen is displayed.

**Step 3 - Enter the ID of the code you want to define.**

- The ID of the code is displayed in the header of the VAL screen.

**Step 4 - Enter an individual code for this validation code table.**

- For example, if you are creating a code for prospect statuses, enter a code for each status you want to define, such as **INQ** for Inquiry or **SER** for Serious.

**Step 5 - Enter the description of the associated code.**

- The code description is displayed and the cursor moves to the Min element.

**Step 6 - Enter the minimum characters required to identify the associated code.**

- The number of minimum characters required to identify the associated code is established, and the cursor moves to the Special Processing element.
- For example, if you named a code SER (for serious prospect), you could use this field to indicate a minimum number of acceptable characters that can be entered for this code, by entering **S** in this field.
  - You will only have to enter S in a code field to identify this code.

**Step 7 - Do you want to define special processing for this code table?**

- Entering any random number for Special Processing will not do anything in Colleague as Special Processing codes are programmed in Colleague.
- If yes, enter the special processing information.
  - Move the cursor to the next Code group element.
  - Continue with step 8.
  - Space is provided for two special processing codes.
- If no, move the cursor to the next Code group element and continue with step 8.

**Step 8 - Do you want to change the maximum code size for this code table?**

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- The Maximum Code Size for a Validation Code should not be changed even though the Validation Code is a Read/Write val code.
- The answer to this question should always be “No”.

### **Step 9 - Repeat step 4 through step 8 until all the codes you want are defined for this validation code.**

- When you are finished completing the VAL screen, save the information. The menu from which you accessed VAL is displayed.

# South Dakota Colleague System Procedures

## Defining Demographics Codes

Responsibility: DA Group

Complete the following steps to define Demographics codes:

### **Step 1 - Understand the different Demographics codes and how they are defined.**

- Read “Codes Used in the Demographics Module”

### **Step 2 - Define each code.**

- Remember that code setup is a process that involves all offices within the institution that will use those codes.
- Some codes are defined using a screen and some are defined using the Validation Codes (VAL) screen.
  - For codes defined using the Validation Codes (VAL) screen, be sure to access the screen from within the Core application.

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## Creating Name and Address Type Codes

Responsibility: DA Group

Name type codes are defined in the FORMATTED.NAME.TYPES validation code table (in the CORE application).

Address type codes are defined in the ADREL.TYPES validation code table (in the CORE application).

**Step 1 – Access the CORE menu by typing CORE at the prompt**

**Step 2 – Access the Validation Codes (VAL) screen**

**Step 3- At the Validation Code ID Lookup prompt, enter the name of the validation code table**

- If it does not exist, enter (A) to add
- Define ADREL.TYPES - Only special processing that does anything are:
  - 1 – Home
  - 2 - Business
  - 7 – Correction (COR) for deletes
  - WEB – 3 in spec one and “web” in processing 2 (if we want the web address changes to be preferred mailing)
  - FAC – 2 in column one and “fac” in column two, for the address to show on FCSI
  - RMA - 13 in column 1 and “RMA” in column
  - See Associating Address Type Codes to Addresses procedure in CORE for a definition and usage of address types
- Define PHONE.TYPES
  - Assign “CEL” and “EME” a spec processing type of “P”.
    - This means the cell number will follow them as it’s a personal number.
  - Delete the PHONE.TYPE of “Web”.
- Define FORMATTED.NAME.TYPES
  - Add PA-Parent, MO-Mother, FA-Father

**Step 4 – Update the VAL screen**

# South Dakota Colleague System Procedures

## Associating Name Type Codes to Names

Responsibility: University

Complete the following steps to associate formatted name type codes to person records.

### Step 1 - Create the formatted name type codes that you want to use.

- Create 3 FORMATTED.NAME.TYPES (MO-Mother, FA-Father, PA-Parents). On FNM screen, setup an entry called “PA” (for example) and then add the name of the parent to this type for the student. Then you can go to NAHM and setup a hierarchy for Parent Name and set it up to look at the new name type.

### Step 2 - Access and complete the Formatted Names (FNM) screen for each PERSON record that you want to code with one or more formatted names.

- For each person record, define the name that you want to use for each formatted name type.
  - For example, if you have a record for a person named “John Smith” and you want to print checks for that person using the name “Jonathan B. Smith,” associate the check name with the formatted name type code for checks.
  - Another example would be for a person who goes by their middle name such as J. Lynn Barnes. Her legal name as it appears on her SSN card would be entered on NAE as Jennifer Lynn Barnes. However, she would like to have her transcript to read as J. Lynn Barnes. So, a FORMATTED.NAME.TYPE val code could be defined as “TR” for Transcript and it would be included as well in the Name and Address Hierarchy set up.

### Step 3 - Save the record.

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## Defining Privacy Warning Messages

Responsibility: DA Group

Complete the following steps to define privacy warning messages.

**Step 1 - Review the system privacy settings and rules related to privacy.**

**Step 2 - Define the privacy codes that you want to use at your institution.**

**Step 3 - Access and complete the Person Privacy Warnings (PID5) screen to define the privacy-related warning messages that you want to use.**

- Enter a System Login Message
  - Enter a message to be displayed each time a user accesses the system
- Create a warning message for each privacy code used.
  - D Don't release address/phone
    - Phone and address should not be released in publications or distributions
  - P Don't release phone number
    - Phone number should not be released in publications or distributions
  - A Don't release address
    - Address should not be released in publications or distributions
  - E Secure everything
    - Directory information should not be released in publications, distributions or over the phone
  - F Faculty
    - Faculty directory information should not be released in publications or distributions
    - Faculty with this code can be more restrictive than persons with the E code based on who is assigned the F code on the Staff Record.
  - X Duplicate Record
    - Used for erroneous data entry of person record, i.e. duplicates
- Enter a Record Denial Message
  - Enter a message to be displayed when Privacy Code values deny access

**Step 4 – Update the PID5 screen**

## **Defining Address Security: By Office Code**

Responsibility: University

Complete the following steps to define address security based on office codes. To define address security for individual staff members, see Procedure for Defining Address Security: Individual Mode.

### **Step 1 - Define the address types that you want to use at your institution.**

- See Defining Core System Codes for more information about defining codes at [clients.datatel.com](http://clients.datatel.com).

### **Step 2 - Determine the address types that each office can update.**

- Work with all of your institution's implementation representatives to compile this information.
- All staff members associated to an office can update the address types defined for that office.

### **Step 3 - Access and complete the Address Record Security (ADRS) screen.**

- For each office code, list the address types that members of this office can update.
- If an office can update more than one address type, list the office code again and associate it with an additional address type.

NOTE: If using the option of setting up the Address Record Security, ALL Office Codes listed in OFFICE.CODES val code table need to be listed with the appropriate associated ADREL.TYPE the office can modify.

### **Step 4 - Save the record.**



## Defining Address Security: Individual Mode

Responsibility: University

Complete the following steps to define address security for your institution for individual staff members. You can define address security for individual staff members when you create the staff records or at a later date. To define address security based on office codes, see Procedure for Defining Address Security: By Office Code.

### Step 1 - Define the address types that you want to use at your institution.

- See Defining Core System Codes for more information about defining codes at [clients.datatel.com](http://clients.datatel.com).

### Step 2 - Determine the address types that each staff member can update.

- Work with all of your institution's implementation representatives to compile this information.

### Step 3 - Access a staff record for which you want to define address security on the Staff and Volunteers (XSVM) screen.

**Enter the following information for each staff member that you want to define:**

- Staff Code - Enter their login ID
- Operator ID – Enter their login ID
- Staff Type – S for Staff
- Staff Status – C for Current, F for Former

#### Define the following codes:

- Office codes
  - To link this staff member to one or more offices and take advantage of office level security, list the offices in which this staff member works in the Office Codes field.
  - Office codes are smart coded; use the university identifier and ... to locate the correct office code
  - If this user needs access to shared admission/financial aid information, assign them the shared office code for that module.

**Note:** Never leave this field blank. If they have no office codes, enter office code NONE. **(IT personnel should have the Office Codes field blank to will allow for trouble-shooting problems related to Comm. Mgmt. and Rules Processor modules.)**

**Note:** Since we are smart coding office codes, we won't need to assign locations on XSVM.

- Privacy codes
  - To restrict the information that a staff member can access about a student or other individual based on privacy settings, enter the privacy codes

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corresponding to the level of privacy that this user can access in the Privacy Access field.

- The access staff should have to prospects would be identified and the code (i.e. keys), (or list of codes for ESC, EUC, SDPURC), would be attached to their respective staff record in Colleague. This would create the environment now where student records are secured unless the operator has the right code attached to their security record (the right key for the lock). Once an operator has access, they would be able to view all information about a student.
- No one but IT would have the Privacy Access code of “X” on their STAFF record.

## **Step 4 - List the address types that this staff member can update in the Address Security Overrides field.**

- Address Security Overrides (Only used to override what is defined on ADRS)
  - If you want to define address security for individuals, you can enter that information when creating the staff record.
  - The ADRS screen is directly related to the Address Security Override field on XSVM.
    - Example: Admissions can change “Home” type of addresses as defined on ADRS and Financial Aid can change “Local” addresses.
    - There is one person in FA, however, that should also be able to change “Home” type addresses.
      - On that person’s XSVM record, we would put the “Home” type address indicating that we are overriding what was defined on ADRS.

## **Step 5 - Save the record.**

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## **PERSON**

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## Adding a Person

Responsibility: University/ESC

Use the Name and Address Entry (NAE) screen to add a new record for an individual. Be sure to carefully follow search procedures for LookUp and record identification before you add a record to the database.

**Note:** If an address already exists, changes **MUST** be made on ADSU detailing to ADR. See Entering Name and SSN Changes for changes to names and SSNs.

### Step 1 – Access the Name and Address Entry (NAE) screen

### Step 2 – At the person lookup prompt, enter the SSN or the Colleague Id of the person.

- If there is a person with that SSN or Colleague ID, the person's record information will automatically appear on the NAE screen.
- If there is not a person with that SSN, enter the partial name of the student to further clarify your search
  - For example, Rei for Reihe
- If the name search brings up a resolution screen, check the birthdate and/or SSN to make sure it is the right person.
- If a record is not found, enter the first 3 characters of the last name followed by a semicolon (;) followed by a blank space, then XH.PERS.HOME.PHONE followed by a blank space and the phone number enclosed in apostrophes and including hyphens. (Ex: POM; XH.PERS.HOME.PHONE '605-225-0001'). If the last name is not legible, alternate versions of the first 3 characters may need to be used. Note some phone numbers are stored with \*'s instead of -'s.
- If not found by name, then enter ; BIRTH.DATE = 'xx/xx/xxxx' to find a female that may have gotten married to help reduce duplicates
- If you have exhausted all the look up options, enter A to add.

**Note:** Because duplicate records can cause serious problems for your institution, you must thoroughly search the database for an existing record for a person before you add a new record. Use Person LookUp and carefully follow search procedures for preventing duplicate records.

### Identifying Duplicate Records

- How do you know if you have a duplicate record?
  - Compare the SSN
    - Is it the same?
    - Is it close? Have the numbers been transposed?
  - Compare the Last, First, Middle name
    - Is it the same?
    - Is it close? What is the nickname? What are the other names?
  - Compare the birth date
    - Is it the same?

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- Is it close? Have the numbers been transposed?
  - Compare the address, including the e-mail address
    - Is it the same?
  - Compare the phone number
    - Is it the same?
  - Compare the high school graduation date
    - Is it the same?
  - Compare the academic history
    - Is it the same?
- If one or more of the above are the same – **STOP**
  - Provide the information that leads you to believe you have a duplicate record to the universities involved
  - Do Not process the record any further
  - The universities will continue with Step 2 in the Duplicate Record Cleanup Procedures

## Step 3 – Leave the prefix blank

- Unless the individual has made a specific request, this field should be left blank in the merged environment
- Examples include: MR, MS, DR, FR, SR, REV, BROTHER

## Step 4 – Enter the name and any suffix the person has indicated on the application.

### Legal Name

- In the order of Last Name, First Name and Middle Name if the student has provided the information.
  - Effective Spring 2005, a student's name will not be changed for students with SSN matches if the student has academic history records on Colleague (the student has academic history records with a Credit Type of xMI, xMIR, I, or IR). If the application is for a single BOR institution, the AAI or paper record will be sent to the university contact person who will obtain the needed documentation and upon receipt of the documentation will manually update the record. If the application is for multiple BOR institutions, the AAI or paper record will be sent to ESC who will obtain the needed documentation and upon receipt of the documentation will manually update the record. The university or ESC will enter the application into Colleague adding the new name to the "Other Name" field #17 on NAE for tracking purposes. Any correspondence with the student should be manually addressed to them using their new name. The university or ESC will enter a comment on the student's record, with a name and date stamp, so the university or ESC housing the name change documentation can be easily identified. The comment will be entered on the UTEC screen (can be reached by detailing from ASUM or ASPR).
  - If the SSN number matches and the student does not have academic history records (was previously only a Prospect or Applicant), the name will be changed.

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- When there appears to be an error in a previously recorded name, (i.e Bob vs Robert, reading handwriting incorrectly such as Larsen vs. Larson. etc.), and for a name change for a student who does not have academic history records on Colleague, a SSN card may be used to clear such discrepancies. However, a SSN card is not acceptable documentation for a name change for a student who has academic history records on Colleague. Acceptable documentation for a name change for a student with academic history includes a certified copy of a marriage license, court order, or dissolution decree reflecting the new name in full. For non-US citizens: current passport or official proof of identify, certified by US embassy abroad or by the appropriate foreign embassy in the US.
  - Add nicknames in the Nickname field on BIO which you can access from NAE by detailing on the Last Name field.
- Enter the names exactly as they appear.
- Use the punctuation documentation if a name has a hyphen or apostrophe and you are not sure of the correct way to enter the name.
  - If a student has two or more capital letters in their last name (McDonald), instead of typing Mc\_Donald, type =McDonald.
    - Using an equal sign guarantees the name will save exactly as you typed it.
    - This will overwrite Colleague's capitalization rules.

## **Suffix**

- Enter only if the student lists a suffix at the end of their name
  - Ex. Jr, Sr, III.
- Otherwise leave this field blank.

## **Step 5 – Enter the home address**

**Note:** Former addresses are to be retained.

- When entering the permanent home (HOM) address
  - When entering an address on the NAE screen, the address type defaults to HOM.
  - Do not use punctuation when entering the address.
  - Use no more than 2 lines for the address.
    - If the address has a PO Box and a street address, enter the PO Box only on the 1<sup>st</sup> line. The street address is entered as a FAM address type – see Step 6.
  - **Enter the zip code (excluding foreign zips except for Canada & Mexico)**
    - Enter the Zip code in the City element and city and state will automatically be filled. Check the city/state/zip information that's returned for validity.
    - If no information is returned for zip code, enter city name in City, the State code and the Zip code. Verify correct spelling of city name when adding.
  - Detailing allows for storing multiple addresses. (See Adding/Changing and Address in Core).

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- The system will default the address type to HOM and set the preferred mailing and address flags to ‘Yes’.

## Step 6 – Enter other addresses

- When entering an address other than the permanent home (HOM);
  - Detail on the address field. If ADSU displays, detail on a new line to ADR.
  - On ADR, enter the address information using the following address types as appropriate: Current Mailing Address use (LOC), Next of Kin address use (FAM), Foreign use (FOR).
    - See Associating Address Type Codes to Addresses procedure in CORE for a definition and usage of address types
    - If this is a staff member, enter their university address (INS)
  - See Adding/Changing an Address in Core.
- If the Next of Kin address is different from the Permanent Address, enter the Next of Kin address and indicate (FAM) Family for address type.
- If both the Permanent and the Current Address are the same, list the address only once using (HOM ) Permanent Home and indicate “Y” as Preferred. If this is an address for a Staff Member with a type of INS, indicate “Y” as Preferred on INS.
  - At the time of application, duplicate address will not be entered. But, students have opportunities electronically to update their address. If a student enters the same address twice, it will not be audited for and removed.
- When an address is changed on ADR, a prompt to retain address history and an address change source will display. Retain address history and use the appropriate address change source. For example, if the source of the new address is the application, use Application (APP), use Student (STU) if the source is from the student directly via email or verbal etc. Use correction (COR) only when there is a genuine mistake that needs to be corrected.

### If entering a foreign address

**Note:** Per Postal Regulations, the full address should be typed or legibly written in English and should be placed lengthwise on one side of the item whether it is an address label or envelope. An address in a foreign language is permitted if the names of the city, province and country are also indicated in English. The last line of the address block area must include only the complete country name (no abbreviations) written in uppercase letters. Following is the order of information for the destination address:

The following are examples of properly formatted delivery addresses:

MS JOYCE BROWNING	MR JACQUES MOLIERE
2045 ROYAL ROAD	RUE DE CHAMPAIGN
LONDON WIP 6HQ	076570 ST PAUL

# South Dakota Colleague System Procedures

ENGLAND	FRANCE
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Regarding mail to Canada, the location of the country name and postal code are interchangeable with US Postal formatting; either one may be placed on the last line, with the other placed after the city and provincial name. Following are examples of destination addresses to Canada:

MS HELEN SAUNDERS	MS HELEN SAUNDERS
1010 CLEAR STREET	1010 CLEAR STREET
OTTAWA ON K1A OB1	OTTAWA ON CANADA
CANADA	K1A OB1

Following is the order of entering information for the destination address

## LINE 1: NAME OF ADDRESSEE

- Name of student entered on NAE

## LINE 2: STREET ADDRESS

- Enter on the Address field line 1 on ADR
- Do not enter the street address and box number on the same line.
  - SEVIS requires a physical address, not a box number

## LINE 3: CITY OR TOWN NAME, OTHER PRINCIPAL SUBDIVISION (i.e., PROVIDENCE, STATE, COUNTY, etc).

- Enter the city name in City and the state code in State on ADR.
- For countries besides Canada and Mexico, enter the province/state (if any) with the City and leave State blank.

## LINE 4: COUNTRY NAME (UPPERCASE LETTERS IN ENGLISH)

- Enter the country code in the Country field on ADR.
- For foreign addresses, enter the address type as FOR on the ADR screen.

### **Step 7 – Enter the Residence county and state code**

Use the “legal address” (permanent address) at the time of the application as the source for completing the State/County of Origin. The resident county and state fields (#6) on NAE and the residence state and residence county fields on DADD (#9 & #10) are the same fields.

Entry of residency information at the time of initial application:

- Enter the residence state code using the permanent address as the source.
- Enter the residence county only if the applicant is a SD resident using the permanent address as the source.



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- These fields are used to retain the original residency information for a student.
- The residency status on the application (APPN) should match the residence state i.e. 'R' Resident if SD and 'N' if other than a SD resident.

Entry of residence information for subsequent applications:

- If the student did not attend any regental university as a result of the initial application:
  - Enter the residence state code using the permanent address as the source.
  - Enter the residence county only if the applicant is a SD resident using the permanent address as the source.
  - If the student did attend any regental university and is now returning after an absence, do not change the residence state code on NAE or DADD. If the student is becoming a SD resident, the county field will need to be updated with the SD county.
  - Instead, if the new state code is different than the original residence state, enter the new state in the person origin field on NAE using the permanent address as the source. Do not change the origin county unless this student is becoming a resident and there was not a SD county listed.
- The residency status on the application (APPN) and (ASPR) should match the state recorded in either the person origin field or the residence state field.

The IPEDs definition is as follows:

State of residence - Use the state identified by the student as his/her permanent address at the time of application to the institution. This may be the legal residence of a parent or guardian, or the state in which a student has a driver's license or is registered to vote. It is not necessarily the state in which the student's high school is located.

## **Step 8 – If this is an international student, enter the country**

**NOTE:** If the applicant is a resident alien, enter "US" only after a photocopy of the valid Resident Alien Card is received. Until the valid Resident Alien Card is received, enter the country the applicant is a citizen of. Enter non-resident until the valid Resident Alien Card is received.

**NOTE:** If the applicant checks "other" for citizenship, the application and any other documentation received will be forwarded to the appropriate campus' international student advising office.

## **Step 9 – Enter the phone number, extension and type**

- Enter the phone number including area code.
- Do not use any dashes or parenthesis,
  - Ex. 6056262544 would be an accurate way to enter the phone number for the admissions office.
  - Phone numbers of hearing impaired persons may be stored with \*'s and/or with 'text' at the end so as to signify this person cannot receive a phone

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call placed in the usual manner and alternate means of communication will be needed. The phone number can be entered as 605\*626\*2544, 605\*626\*2544text or 6056262544text.

- Only use the extension field if an extension is given (rarely)
- Enter the type of phone number. Press F1 twice to list the valid codes.
  - Use 'H' for Home; 'L' for Local; 'F' for a foreign; 'B' for business;
- International phone numbers can be entered here and do not need to follow US and Canadian formatting of phone numbers.

## Step 10 –Origin and date of contact

- The origin/date field on NAE will no longer be used for origin information.
  - Origin, in the merged environment, will be entered and stored as smart-coded communication management codes to allow them to be secured by university through the use of office codes. Enter xACOR and . . . , where 'x' is the identifier for your university to see a list of codes for your university.
    - ESC will enter the xACORAP (where 'x' represents the university) on PRSP for applicants who have no NAP records already for a specific university.
  - To enter the origin on the Prospect Summary (PRSP) screen, access the Comm Code field and enter the appropriate code.
  - To enter the origin on the Communication Code Entry (CRI) screen, enter the appropriate code on a blank line.
  - Follow university procedures for entering this information.
- Use the origin field for the student's most recent resident state of origin (originally stored in the driver's license field on DADD).
  - Enter the student's most recent state of origin only if it is different than the initial origin which is coded in the state of residence field.
  - Enter the date the most recent state of origin is applicable

## Step 11 – Enter the social security number

- Enter the social security number if it is available.
- You do not need to add any dashes as Colleague will automatically add the dashes for you.
- If the SSN on the application differs from the SSN in Colleague, do not update at this time. A letter will be sent requesting a photocopy of the applicant's SSN Card.
- If the SSN matches another in Colleague a pop up box will appear with the Colleague ID and name of the person that number is assigned to.

## Step 12 – Enter the birth date

- Enter the birth date without slashes
  - Ex. 031369.
  - If the month or day is 9 or less, add a zero to the front of the number.
  - Format MM/DD/YYYY
    - Prior to 1930, all four digits of the year must be typed in

# South Dakota Colleague System Procedures

**Note:** Birthdate is an important extract data element and should be obtained unless the individual refuses to give it.

## **Step 13 – Enter the ethnic/race/gender codes**

**This information must be entered to avoid errors in the extract.**

- Entering ethnic/race code(s)
  - Enter Ethnic(s) Code
    - Ethnic(s) may be entered but is not required.
    - Enter ethnicity HL for Hispanic/Latino
    - Enter ethnicity NHL for Non-Hispanic/Latino
    - Access the drop-down box to see the list of valid values.
  - Enter Races(s) Code
    - Race may be entered but is not required
    - Enter as many races as apply.
    - Access the drop-down box to see the list of valid values.
  - Archived Ethnic
    - It is no longer necessary to record this information.
  - If “do not wish to respond” is marked
    - No ethnic code is entered
    - No race code is entered
- Enter the gender code
  - Gender is an ‘F’ for female and ‘M’ for Male.
  - Also, if the gender is obvious from the first and middle names, you can use that information to record gender if it is not listed on the prospect information.

## **Step 14 – Enter the e-mail address if available**

- Prospect email type and address
  - An email address will be entered for every university the prospect is interested in.
  - At least one email address should be entered using the university-specific email type.
  - If used, the PRI email address should be entered in the first line.
  - Change the PRI and WEB address only after confirmation from the prospect.
- Enter the applicant’s e-mail address type(s).
  - The type of e-mail address will be smart coded by university. For example, SE for SDSU, BE for BHSU, and DE for DSU. Look up using university identifier and ‘...’, Ex. B...
    - xE will be used for the university specific (.edu) e-mail address
    - xE2 will be used for a personal e-mail address
  - The PRI email type may be entered for a prospect but is not required unless Communications Management is used to send prospect email messages. PRI is the default email type specified on PID2 for the system.

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- The WEB email type may be entered at this time but is not required.
- Enter the email address(es)
  - Use exact case and punctuation.
  - When changing the PRI e-mail address, enter the original address in the comments field on the Prospect Summary (PRSP) screen. Date and time stamp the comment and then enter the previous email address.

## **Step 15 – Enter the preferred name, mail name and other LFM name field**

- Preferred name
  - Automatically defaults to the name originally entered into Colleague.
    - If the preferred name was changed through a name change, the new name will not default in. This will need to manually need to be changed to reflect the name change.
  - Enter the preferred name only if it differs from the full legal name.
    - An example of this would be if a person's given name was Theodore James but they go by TJ.
- Mail name
  - Automatically defaults to the name originally entered into Colleague.
  - Only used if someone gives us a preferred mailing name.
- Other LFM
  - If provided, enter the nicknames in the Nickname field on BIO, which you can access, from NAE by detailing on the Last Name field.
  - List every other or former name the applicant has ever used to reduce the chances of duplicates in the Other LFM field

## **Step 16 – Enter an address source and date**

- Audit trail of who made changes and when.
- Required field if changes are made.
  - When an address is changed on ADR, a prompt to retain address history and an address change source will display. Retain address history and use the appropriate address change source. For example, if the source of the new address is the application, use Application (APP), use Student (STU) if the source is from the student directly via email or verbal etc. Use correction (COR) only when there is a genuine mistake that needs to be corrected.

## **Step 17 – Update the NAE screen**

## Updating a Person's Data

**Responsibility:** University/ESC

**Timeframe:** Ongoing and prior to enrollment reporting; PADU – Before registration

Follow the procedures to update information for an existing person record.

**Note:** This procedure assumes that the person whose information you want to update or change already has an existing record on your database. For a procedure for adding a person's record to the database, see "Procedure for Adding a Person". Be sure to carefully follow search procedures for LookUp and record identification before you add a record for a person to the database.

## Updates for an individual record

### Step 1 - Follow the steps below to update an individual record

### Step 2 - Access the individual's record on the NAE screen.

- You can access the Name and Address Entry (NAE) screen from the menu.
  - Additional demographic information is maintained on other screens such as:
    - BIO Biographic Information
      - Review the following fields
        - Source**
          - Enter a code defining the origin of the person's record and the relationship of the person to the university. For applicants, enter AP, otherwise press F1 for a list of values.
        - Status**
          - Enter a status of 'A' for Active.
        - Marital Status**
          - Enter the appropriate marital status of the applicant, if the information is available.
        - Citizenship:**
          - Enter the applicant's citizenship.
            - A person who is classified as a PR, RA or A1 is NOT a US citizen. Therefore, the Citizenship Country needs to be the country the student came from (typically it is the country on the PR card, I-94 documentation of departure, etc) and the Residence Country is US.
          - Leave this field blank if the applicant is a US citizen.
          - Enter the country the applicant is a citizen of, i.e. SD-Sudan

# South Dakota Colleague System Procedures

- Enter non-resident until the valid Resident Alien Card is received.
- If the applicant checks “other” for citizenship, the application and any other documentation received will be forwarded to the appropriate campus’ international student advising office.
- ADSU Address Summary
- ADR Person Addresses
- PPIN Personal ID Numbers
- EMPL Employment Information
- SPO Spouse Information
- REL Relation Information
- EMER Emergency Information
  - Houses emergency contact information
  - Houses Immunization information
  - Review the following fields:
    - Contact Name**
      - Enter next of Kin Name. Enter in the format: first name, space, last name with no punctuation. In the case where both parent names are listed: first name, space ‘ & ’, space, first name, space, last name. To enter more names, or to record the relationship of the emergency contact name to the applicant, access the Formatted Names (FNM) screen and enter them there.
    - Contact Phone Num**
      - Enter Next of Kin Phone
    - Health Conditions**
      - Enter any health conditions information, if provided
    - Disability**
      - Enter the appropriate disability information, if provided. Lookup (...) and enter if appropriate
- DADD Additional Demographics
  - Houses the pre-merge Home Location in Occupation
  - Houses the Alternate ID
  - Houses a Campus Box Number that can be associated with the student
  - Review the following fields:
    - Occupations**
      - Student home locations on SPRO from prior to the merge were moved to Occupations. Continue to use this field as needed.
    - Denomination**
      - Enter if available on the application.
    - Groups**

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- Enter the Library ID for PALS tracking – used by library personnel
  - Naming convention is Literal Capital ‘BC’ followed by the bar code number
- Enter NTA for ACT tracking – used by Admissions
- Enter the Laptop Serial Number – used to track laptops assigned to individuals
  - Naming convention is Literal Capital ‘xTS’ (where x is the university) followed by the serial number
- LANG Person Languages
- MINF Military Information
  - Review the following fields:
    - Selective Serv Reg/Number**
      - Enter Selective Service Reg (Y/N) and Number, if available
    - Veteran Type**
      - Enter Veteran type information, if available.
    - Military Status Info**
      - Enter Military status information, if available.
- FINF Foreign Person Information
  - FINF is not reported to SEVIS; FPER is reported
- TRVD Travel Documents
- EXVS Exchange Visitor
  - If necessary, you may need to access another screen to record additional demographic information.
- If the Person Resolution screen is displayed, follow your institution’s policy for using LookUp to find a record and for searching for duplicate records.

## Step 3 - Update any necessary information for this person.

- If you change address information on ADR, you must enter a code in the Change Source field to indicate the source of information used when updating the address.
  - When an address is changed on ADR, a prompt to retain address history and an address change source will display. Retain address history and use the appropriate address change source. For example, if the source of the new address is the application, use Application (APP), use Student (STU) if the source is from the student directly via email or verbal etc. Use correction (COR) only when there is a genuine mistake that needs to be corrected.
- Be aware that the NAE screen and the resolution screen shows only the preferred residence.
- If you want to make another residence the preferred address for this individual, see “Procedure for Updating the Preferred Address”.

## Step 4 - Save the record.

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**Note:** This process will run centrally at one location in SD and at a defined time.

## **Batch update of addresses**

### **Step 1 – Access the Person Address Update (PADU) screen**

### **Step 2 – Enter P and the effective start date**

- PADU will move “P” or pending addresses to “C” or current addresses based on the date entered.
- Assign all addresses with an effective start date of some static date so PADU can pick them up
  - PADU activates pending addresses with an effective date on or before the date entered.
- If the dates are not static, universities will need to run PADU for every date or just wait to put address changes on the system until they are active.

### **Step 3 – Update the PADU screen**



## Entering Name and Social Security Number Changes

**Responsibility: University/ESC**

**Timeframe: Ongoing; Prior to enrollment reporting and grading**

**Note:** Documentation required, to perform a name change for a student who has academic history records on Colleague, should be in compliance with the AACRAO recommendation in “The AACRAO Record and Transcript Guide” which states:

“Documentation Needed for Name Change – Certified copy of a marriage license, court order, or dissolution decree reflecting the new name in full. For non-US citizens: current passport or official proof of identify, certified by US embassy abroad or by the appropriate foreign embassy in the US.”

Social Security Number changes require a Social Security Card.

Note: For changes for university employees who were never a student, you may use documentation provided to you by your HR office.

Effective Spring 2005, a student’s name will **not** be changed for students with SSN matches if the student has academic history records on Colleague (the student has academic history records with a Credit Type of xMI, xMIR, I, or IR). If the application is for a single BOR institution, the AAI or paper record will be sent to the university contact person who will obtain the needed documentation and upon receipt of the documentation will manually update the record. If the application is for multiple BOR institutions, the AAI or paper record will be sent to ESC who will obtain the needed documentation and upon receipt of the documentation will manually update the record. The university or ESC will enter the application into Colleague adding the new name to the “Other Name” field #17 on NAE for tracking purposes. Any correspondence with the student should be manually addressed to them using their new name. The university or ESC will enter a comment on the student’s record, with a name and date stamp, so the university or ESC housing the name change documentation can be easily identified. The comment will be entered on the UTEC screen (can be reached by detailing from ASUM or ASPR).

If the SSN number matches and the student does not have academic history records (was previously only a Prospect or Applicant), the name will be changed.

When there appears to be an error in a previously recorded name, (i.e Bob vs Robert, reading handwriting incorrectly such as Larsen vs. Larson. etc.), and for a name change for a student who does not have academic history records on Colleague, a SSN card may be used to clear such discrepancies. However, a SSN card is not acceptable documentation for a name change for a student who has academic history records on Colleague. Acceptable documentation for a name change for a student with academic history includes a certified copy of a marriage license, court order, or dissolution decree reflecting the new name in full. For non-US citizens: current passport or official proof of identify, certified by US embassy abroad or by the appropriate foreign embassy in the US.

### Step 1 – Access the Biographic Information (BIO) screen

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## **Step 2 – Enter the new information**

### **Step 3 – Update the screen**

- If this is a name change, a prompt will ask you if this is a birth change or other name change. If you know it is a birth name change, use B; otherwise use O.

### **Step 4 – If this was a change relevant to a marriage or divorce, access the Biographical Information (BIO) screen**

### **Step 5 – Update the marital status**

- If the documentation was a marriage certificate, enter M
- If the documentation was divorce papers, enter D

### **Step 6 – Update the BIO screen**

### **Step 7 – If this was a SSN change, access the DADD screen**

### **Step 8 – Enter the old SSN in the Alt ID field without hyphens with Alternate ID type as SSN**

- This is used to help FA track aid.

### **Step 9 – Update the DADD screen**

### **Step 10 – Access the Additional Student Profile Info (ASPR) screen**

**Note:** If the applicant is not Moved to Student yet, the comment will need to be entered on the Applicant Summary (ASUM) screen by detailing on the Comments field.

### **Step 11 – Detail on the Comments/Remark field**

- Choose the Edit Comments (UTEC) screen

### **Step 12 – Enter a comment regarding the change**

- Date and time stamp first, then enter the comment

### **Step 13 – Notify the appropriate offices, i.e. FA, of the name/SSN change.**

- This can be done via e-mail to all FA, ADM, Cashier Offices in the state.

# South Dakota Colleague System Procedures

## Adding an Affiliate Person Record for Campus Alert

Responsibility: University

Use the Name and Address Entry (NAE) screen to add a new person record for an affiliate associated with your university that should be notified via Campus Alert in an emergency. Be sure to carefully follow search procedures for LookUp and record identification before you add a record to the database.

### Step 1 – Access the Name and Address Entry (NAE) screen

### Step 2 – At the person lookup prompt, enter the SSN or the Colleague Id of the person.

- If there is a person with that SSN or Colleague ID, the person's record information will automatically appear on the NAE screen.
- If there is not a person with that SSN, enter the partial name of the student to further clarify your search
  - For example, Rei for Reihe
- If the name search brings up a resolution screen, check the birthdate and/or SSN to make sure it is the right person.
- If a record is not found, enter the first 3 characters of the last name followed by a semicolon (;) followed by a blank space, then XH.PERS.HOME.PHONE followed by a blank space and the phone number enclosed in apostrophes and including hyphens. (Ex: POM; XH.PERS.HOME.PHONE '605-225-0001'). If the last name is not legible, alternate versions of the first 3 characters may need to be used. Note some phone numbers are stored with \*'s instead of -'s.
- If not found by name, then enter ; BIRTH.DATE = 'xx/xx/xxxx' to find a female that may have gotten married to help reduce duplicates
- If you have exhausted all the look up options, enter A to add.

**Note:** Because duplicate records can cause serious problems for your institution, you must thoroughly search the database for an existing record for a person before you add a new record. Use Person LookUp and carefully follow search procedures for preventing duplicate records.

### Identifying Duplicate Records

- How do you know if you have a duplicate record?
  - Compare the SSN
    - Is it the same?
    - Is it close? Have the numbers been transposed?
  - Compare the Last, First, Middle name
    - Is it the same?
    - Is it close? What is the nickname? What are the other names?
  - Compare the birth date
    - Is it the same?
    - Is it close? Have the numbers been transposed?
  - Compare the address, including the e-mail address

# South Dakota Colleague System Procedures

- Is it the same?
  - Compare the phone number
    - Is it the same?
  - Compare the high school graduation date
    - Is it the same?
  - Compare the academic history
    - Is it the same?
- If one or more of the above are the same – **STOP**
  - Provide the information that leads you to believe you have a duplicate record to the universities involved
  - Do Not process the record any further
  - The universities will continue with Step 2 in the Duplicate Record Cleanup Procedures

## Step 3 – Leave the prefix blank

- Unless the individual has made a specific request, this field should be left blank in the merged environment
- Examples include: MR, MS, DR, FR, SR, REV, BROTHER

## Step 4 – Enter the name and any suffix the person has indicated on the source document.

### Legal Name

- Enter the Last Name, First Name and Middle Name
- Enter the names exactly as they appear on the source document.
  - The names listed in Colleague will be imported in to Campus Alert. Therefore, it is recommended to add specific names, not organizations since an organization will not get the emergency alert notification, an individual will.
- Use the punctuation documentation if a name has a hyphen or apostrophe and you are not sure of the correct way to enter the name.
  - If a student has two or more capital letters in their last name (McDonald), instead of typing Mc\_Donald, type =McDonald.
    - Using an equal sign guarantees the name will save exactly as you typed it.
    - This will overwrite Colleague's capitalization rules.

### Suffix

- Enter only if the affiliate lists a suffix at the end of their name
  - Ex. Jr, Sr, III.
- Otherwise leave this field blank.

## Step 5 – Enter the home address

**Note:** Former addresses are to be retained.

- When entering the permanent home (HOM) address
  - When entering an address on the NAE screen, the address type defaults to HOM.

# South Dakota Colleague System Procedures

- Do not use punctuation when entering the address.
- Use no more than 2 lines for the address.
  - If the address has a PO Box and a street address, enter the PO Box only on the 1<sup>st</sup> line. The street address is entered as a FAM address type – see Step 6.
- **Enter the zip code (excluding foreign zips except for Canada & Mexico)**
  - Enter the Zip code in the City element and city and state will automatically be filled. Check the city/state/zip information that's returned for validity.
  - If no information is returned for zip code, enter city name in City, the State code and the Zip code. Verify correct spelling of city name when adding.
- Detailing allows for storing multiple addresses. (See Adding/Changing and Address in Core).
- The system will default the address type to HOM and set the preferred mailing and address flags to 'Yes'.

## Step 6 – Enter other addresses

- When entering an address other than the permanent home (HOM);
  - Detail on the address field. If ADSU displays, detail on a new line to ADR.
  - On ADR, enter the address information using the following address types as appropriate: Current Mailing Address use (LOC), Next of Kin address use (FAM), Foreign use (FOR).
    - See Associating Address Type Codes to Addresses procedure in CORE for a definition and usage of address types
    - If this is a staff member, enter their university address (INS)
  - See Adding/Changing an Address in Core.
- If both the Permanent and the Current Address are the same, list the address only once using (HOM ) Permanent Home and indicate "Y" as Preferred. If this is an address for a Staff Member with a type of INS, indicate "Y" as Preferred on INS.
  - At the time of application, duplicate address will not be entered. But, students have opportunities electronically to update their address. If a student enters the same address twice, it will not be audited for and removed.
- When an address is changed on ADR, a prompt to retain address history and an address change source will display. Retain address history and use the appropriate address change source. For example, if the source of the new address is the application, use Application (APP), use Student (STU) if the source is from the student directly via email or verbal etc. Use correction (COR) only when there is a genuine mistake that needs to be corrected.

## Step 7 – Enter the phone number, extension and type

- Enter the phone number including area code.
- Do not use any dashes or parenthesis.

# South Dakota Colleague System Procedures

- Ex. 6056262544 would be an accurate way to enter the phone number for the admissions office.
- Phone numbers of hearing impaired persons may be stored with \*’s and/or with ‘text’ at the end so as to signify this person cannot receive a phone call placed in the usual manner and alternate means of communication will be needed. The phone number can be entered as 605\*626\*2544, 605\*626\*2544text or 6056262544text.
- Only use the extension field if an extension is given (rarely)
- Enter the type of phone number. Press F1 twice to list the valid codes.
  - Use ‘H’ for Home; ‘L’ for Local; ‘F’ for a foreign; ‘B’ for business;

## **Step 8 – Enter the social security number**

- Enter the social security number if it is available.
- You do not need to add any dashes as Colleague will automatically add the dashes for you.
- If the SSN on the source document differs from the SSN in Colleague, do not update at this time. A letter will be sent requesting a photocopy of the SSN Card.
- If the SSN matches another in Colleague a pop up box will appear with the Colleague ID and name of the person that number is assigned to.

## **Step 9 – Enter the birth date if available**

- Enter the birth date without slashes
  - Ex. 031369.
  - If the month or day is 9 or less, add a zero to the front of the number.
  - Format MM/DD/YYYY
    - Prior to 1930, all four digits of the year must be typed in

**Note:** Birthdate is an important duplicate person data element and should be obtained unless the individual refuses to give it.

## **Step 10 – Enter the ethnic/race/gender codes**

**This information must be entered to avoid errors in the extract.**

- Entering ethnic/race code(s)
  - Enter Ethnic(s) Code
    - Ethnic(s) may be entered but is not required.
    - Enter ethnicity HL for Hispanic/Latino
    - Enter ethnicity NHL for Non-Hispanic/Latino
    - Access the drop-down box to see the list of valid values.
  - Enter Races(s) Code
    - Race may be entered but is not required
    - Enter as many races as apply.
    - Access the drop-down box to see the list of valid values.
  - Archived Ethnic
    - It is no longer necessary to record this information.
  - If “do not wish to respond” is marked

# South Dakota Colleague System Procedures

- No ethnic code is entered
- No race code is entered
- Enter the gender code
  - Gender is an 'F' for female and 'M' for Male.
  - Also, if the gender is obvious from the first and middle names, you can use that information to record gender if it is not listed on the prospect information.

## **Step 11 – Enter the e-mail address**

- Enter the email address(es)
  - Use exact case and punctuation.
  - Enter the email address type as PRI

## **Step 12 – Update the NAE screen**

## **Step 13 – Access the Additional Demographics (DADD) screen**

## **Step 14 – At the person lookup prompt, enter the SSN or the Colleague Id of the affiliate**

## **Step 15 – In the Chapters field, enter the smart coded term associated with the affiliate**

- Naming convention is xYYs – where x is the university YY is the year & S is the semester, i.e. – B08F BHSU 2008 Fall
- The affiliates will need to be reviewed on a semester basis since this is the code used to extract them for the Campus Alert import.

## **Step 16 – Update the DADD screen**

# South Dakota Colleague System Procedures

## Defining Staff and Volunteers

Responsibility: University

Complete the following steps to define staff members and volunteers in the system.

**Note:** This procedure assumes that PERSON records already exist for your staff members.

- If you need to add PERSON records for your staff members, see “Adding a Person Record”.
- If you want to define address security for individual staff members and have already defined address types and decided which address types each staff member can update, you can enter that information when you create the staff records.
- See “Procedure for Defining Address Security: Individual Mode” for more information.

Revised 11/3/04
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# South Dakota Colleague System Procedures

## Entering Initial Faculty Assignments

Responsibility – Home

Use this set of procedures when you are creating a FCTY record for the person. If they already have a Faculty record, ie you can bring them up on FCTY, then use the procedures titled “Entering Additional Faculty Assignments” to add a new/additional assignment.

### Step 1 – Access the Faculty (FCTY) screen

### Step 2 – At the person prompt, locate the faculty person record

### Step 3 – Enter their Department

- Enter “...” in that field for a drop down box of all possible values

### Step 4 – Enter a percentage in the PCT field

- As an example, enter 100 if they employed full-time in that dept, enter 50 if they are half-time in that dept

### Step 5 - Enter their Position

- FAC – Faculty
- CHR – Chair
- DEN – Dean
- DIR – Director
- LIB – Library
- MUS – Museum

### Step 6 – Enter their Rank

- 1 – Professor
- 2 – Instructor
- 3 – Graduate Assistant
- 4 – Lecturer
- 5 – Administrative
- 6 – Assistant Professor
- 7 – Associate Professor
- 8 – Librarian
- 11 – Research Scientist

### Step 7 – Enter a Start Date in the Date field

### Step 8 – Enter a percentage in the FT field

- As an example, enter 1.00 for 100%, .50 for half-time

### Step 9 – Enter a Primary Location

# South Dakota Colleague System Procedures

**Step 10 – Enter Max work load and Start Date**

**Step 11 - Update the FCTY screen**

# South Dakota Colleague System Procedures

## Entering Additional Faculty Assignments

Responsibility – Home

Use this set of procedures when the faculty member already has a Faculty record, ie you can bring them up on FCTY without doing an Add. If they do not have a FCTY record, then use the procedures titled “Entering Initial Faculty Assignments”.

### **Step 1 – Access the Faculty (FCTY) screen**

### **Step 2 – At the person prompt, locate the faculty person record**

### **Step 3 – Enter their current department(s) if it is not already on the list**

- Enter “...” in that field for a drop down box of all possible values

### **Step 4 – Enter a percentage in the PCT field**

- As an example, enter 100 if they employed full-time in that dept, enter 50 if they are half-time in that dept
- Percentages determined by the university

### **Step 5 - Enter their Position if it is not already on the list**

- FAC – Faculty
- CHR – Chair
- DEN – Dean
- DIR – Director
- LIB – Library
- MUS – Museum

### **Step 6 – Enter their Rank for their new position**

- 1 – Professor
- 2 – Instructor
- 3 – Graduate Assistant
- 4 – Lecturer
- 5 – Administrative
- 6 – Assistant Professor
- 7 – Associate Professor
- 8 – Librarian
- 11 – Research Scientist

### **Step 7 – Enter a Start Date in the Date field fir a new position**

### **Step 8 – Enter a percentage in the FT field if your university is the primary location**

- As an example, enter 1.00 for 100%, .50 for half-time

### **Step 9 – Enter a Primary Location. If a primary location exists, overwrite it.**

# South Dakota Colleague System Procedures

**Step 10 – Enter Max work load and Start Date (if your university is the primary employer)**

**Step 11 - Update the FCTY screen**

# South Dakota Colleague System Procedures

## **Ending Faculty Assignments**

Responsibility – Home

**Step 1 – Access the Faculty (FCTY) screen**

**Step 2 – At the person prompt, locate the faculty person record**

**Step 3 – Enter .0 in the PCT field of the Department(s) for the university where no longer employed**

**Step 4 – Enter a percentage in the FT field of the position.**

- If the person was a TA, enter 0.00% in the FT field of the position
- If the person was not a TA and is not employed elsewhere in the system (all dept PCT fields are 0) enter 0.00% in the FT field of the position

**Step 5 – Enter an End date for Max Workload if the person is not employed elsewhere in the system (all dept PCT are 0)**

**Step 6 – Update the FCTY screen**

# South Dakota Colleague System Procedures

## Adding An XSVM Record

**Step 1 - Access and complete the Staff and Volunteers (XSVM) screen to create STAFF records for each staff member.**

**Step 2 - Enter the following information for each staff member that you want to define:**

- Staff Code - Enter their login ID for non-Colleague users (Starfish users, WA only users, etc.), no Opers is needed. Enter a value in the Staff ID field following the normal naming convention for Opers IDs. If it's a common name, check to make sure the Opers ID isn't already used.
- Operator ID – Enter their login ID for non-Colleague users (Starfish users, WA only users, etc.) no Opers record is needed, so leave this field blank
- Staff Type – S for Staff, SS for Student/Staff (primarily student, secondarily staff – i.e. workstudy student)
- Staff Status – C for Current, F for Former

**Note:** If a user's UNIX ID has changed and you are changing an existing Staff record, enter the old UNIX ID in the Comments Field, before changing the Staff Code and Operator ID to the new Unix ID.

**Step 3 - Define the following codes:**

- Office codes
  - To link this staff member to one or more offices and take advantage of office level security, list the offices in which this staff member works in the Office Codes field.
  - Office codes are smart coded; use the university identifier and ... to locate the correct office code
  - If this user needs access to shared admission/financial aid information, assign them the shared office code for that module.
  - If this user is a non-Colleague user (Starfish user, WA only user, etc.) then add the office code of NONE.
  - Office level security is used in Colleague for Communications Management and Rules and in WebAdvisor it allows Advisors to remove advising restrictions from their advisee's records.

**Note:** Never leave this field blank for anyone except IT personnel. If they have no office codes, enter office code NONE. **(IT personnel should have the Office Codes field blank to allow for trouble-shooting problems related to Comm. Mgmt. and Rules Processor modules.)**

**Note:** Since we are smart coding office codes, we won't need to assign locations on XSVM.

# South Dakota Colleague System Procedures

**Note:** University specific office codes for one university should not be assigned to staff members for another university without the approval of appropriate administration at each university.

- Universities
  - List staff member's university privacy codes for access to prospect/applicant records
  - Typically, this field will only contain the university the employee works at
  - Add all university codes to staff members at UC (SF) and ESC
  
- Privacy codes Access
  - To restrict the information that a staff member can access about a student or other individual based on privacy settings for that individual on BIO, enter the privacy codes corresponding to the level of privacy that this user can access in the Privacy Access field.
  - The access staff should have to records would be identified and the code (i.e. keys), would be attached to their respective staff record in Colleague. This would create the environment now where student records are secured unless the operator has the right code attached to their security record (the right key for the lock). Once an operator has access, they would be able to view all information about a student.
  - Privacy code access is also enforced in WebAdvisor, so staff who should be able to see info for students with privacy codes, need a staff record with the appropriate privacy codes.
  - No one but IT would have the Privacy Access code of “X” on their STAFF record.
  
- Address Security Overrides
  - If you want to define address security for individuals, you can enter that information when creating the staff record.
  - The ADRS screen is directly related to the Address Security Override field on XSVM.
    - Example: Admissions can change “Home” type of addresses as defined on ADRS and Financial Aid can change “Local” addresses.
    - There is one person in FA, however, that should also be able to change “Home” type addresses.
      - On that person’s XSVM record, we would put the “Home” type address indicating that we are overriding what was defined on ADRS.

## **Step 4 – Update the XSVM screen.**

# South Dakota Colleague System Procedures

## Ending An XSVM Record

**Step 1 – Access the Staff and Volunteer Maintenance (XSVM) screen**

**Step 2 - Remove the Operator ID**

**Step 3 - Set Staff Status to “F” = Former.**

**Note:** We will know what the ID was, for future reference, as it will still be stored in the Staff Code Field

**Step 4 - Remove all of the office codes (Ctrl +D) and put in the office code ‘NONE’**

**Step 5 – Remove all the universities (Ctrl+D)**

**Step 6 - Remove all the Privacy Access codes (Ctrl +D)**

**Step 7 – Remove all the Address Security Override codes**

**Step 8 – Update the XSVM screen**



# South Dakota Colleague System Procedures

## **Recording an Unverified Death**

Responsibility: University

Follow the steps below to enter unverified information about a deceased person.

**Step 1.** Access the Unverified Deceased (UDEEC) form.

**Step 2.** At the Person LookUp prompt enter the ID or the name of the person whose deceasing information is to be recorded.

- You can also use the Person LookUp to search for the person's record.

**Step 3.** Enter all the deceasing information that you have received about the selected person including the notification date, unverified deceased date, and other details, as required.

**Step 4.** Update out of the UDEEC form.

- For more information about the UDEEC form, see the online help.

# South Dakota Colleague System Procedures

## Recording a Verified Death

Responsibility: University

Follow the steps below to enter verified information about a deceased person, upon confirmation of death.

**Note:** Proper documentation is needed before processing. Typically, this is in the form of a letter from the Dean of Students.

**Step 1.** Read “Understanding How to Record a Death” in the CORE Manual at [clients.datatel.com](http://clients.datatel.com).

**Step 2.** Access the Registration (RGN) screen and delete or WD all current/future semester registration

- If the student is currently enrolled, process a WD
  - See step 3
- If the student is enrolled for a future term, process a delete.
  - Enter an X in the Status field for all sections that have not started yet

### **Step 3 – Inactivate any active programs**

- If this student is not MTS
  - Access the APPN screen for the student
    - Enter cancellation date
      - Enter the date of the death
    - Enter the reason.
      - Enter DC for deceased
  - Update the APPN screen
    - If this student is MTS and registered for the current term
      - Access the Student Withdrawal (SWTH) screen for the student
        - Complete the following fields:
          - Hiatus - L (IPEDS Exclusion)
          - Reason – Enter DC
          - Last Attendance Date - Enter last date of attendance
          - Term - Term (ex 2002SU/SP/FA)
          - Start/End Date - Enter effect date of the withdrawal as the start date /Do not enter an end date
          - Advisors - Detail to Student Advisor Listing (STAD) screen
        - Detail on advisor(s) name(s) of all active program(s) to Faculty Advisee Detail (FADT) screen
          - Enter an end Date with effective date of withdrawal.
      - Detail on Registration Info from the FADT screen to go to the Student Acad Program (SACP) screen

# South Dakota Colleague System Procedures

- Detail on Status/Dt/Opr. to go to the Student Program Status History (SPSH) screen
  - go to next available field and type (W) Withdrawn & enter,
  - Type effective date of withdrawal.
    - End Date will populate after screen saved.
- Update until you are returned to a blank SWTH screen.

## **Step 4.** Access the Address Summary (ADSU), detail to the Addresses (ADR) screen

- If this student is not MTS
  - Access the APPN for the student, detail on Comments
  - Date and time stamp first, then enter the comment
- If this student is MTS
  - Access the Addnl Student Profile Info (ASPR) screen, enter the last known address and e-mail address for this student
  - Date and time stamp first, then enter the comment
  - Flag the comment with LKA – to signify the last known address
- Access ADR and enter COR in the address type field
- Add a new Address on ADR for the University Registrar Office or Registrar Office designee. This address should be marked as the current address.
  - Address Line 1: c/o Registrar's Office (or designee)
  - Complete City, state and zip of the University Registrar Office
- Delete e-mail address(es)

**NOTE:** Do not remove residence state, ethnicity or birthdate as this will cause errors on the enrollment extract.

## **Step 5.** Access the Deceased (DEC) screen.

**Step 6.** Enter all the verified information you have received about the deceased person including the status, verified deceased date, verification source, and other details, as required.

## **Step 7.** Update out of the DEC form.

- For more information about the DEC form, see the online help.

## **Step 8.** Access the Student Academic Level (STAL) screen

- Enter DD in the Notes field
- Enter a comment in the comments field, x - 'Student deceased (date)' where x is the university identifier.
  - When recording a death prior to F03, enter a comment for every university so it prints on all pre-merge transcripts.

# South Dakota Colleague System Procedures

**Step 9.** Update the STAL screen

**Step 10.** Access the DRUS screen

- Use Record-Delete (Shift-F10) to remove the individual from the WA Registry
- Forward the Colleague ID and WA username to the university WA LDAP admin, to be removed from the Production LDAP database.

**Step 11.** Access the BIO screen

- Enter DC as a Privacy Code for the student

# South Dakota Colleague System Procedures

## Correcting an Accidentally Recorded Death

Responsibility: University

Follow the procedures below to correct an accidentally recorded death.

**Step 1.** Read “Understanding How to Record a Death” in the CORE Manual at [clients.datatel.com](http://clients.datatel.com).

**Step 2.** Do you need to reverse Verified Deceasing?

**No.** To reverse unverified deceasing, on the Unverified Deceased (UDEEC) form, access the person for whom you want to correct the accidentally recorded death. Follow your institution’s policy for using LookUp to find a record and for searching for duplicate records. Remove the deceasing information for the person, and update out of the form.

**Yes.** Continue with Step 3.

**Step 3.** On the Deceasing (DEC) form, access the person for whom you want to correct the accidentally recorded death.

**Step 4.** If the status is Verified Deceased, note the deceased date for later use.

- Change the status to Active, and clear any additional information that had been entered about the incorrect deceasing.

**Step 5.** Update out of the DEC form.

- Continue with the next step only if the status had been Verified Deceased.

**Step 6.** Access the REL workflow for the person for whom you want to correct the accidentally recorded death.

- Colleague displays the Person Relations (PREL) form for the person.

**Step 7.** If a Spouse was present, find that ID in the Other field.

**Step 8.** Detail on the late spouse’s ID to access the spousal relationship on the Relationships (RELE) form for the person and delete the Late Spouse relationship that was created, if applicable.

**Step 9.** Also, remove the end date from the spousal relationship, if applicable.

**Step 10.** Next, from the Joint Mailing field, detail to the Joint Mailing (JTML) form for the person.

**Step 11.** Check the Joint Mail and Joint Solicitation fields to verify that these fields have a value of **Y** (these fields would have been set to **N** upon deceasing).

**Step 12.** Update out of the JTML form.

# South Dakota Colleague System Procedures

- Colleague returns you to the RELE form.

**Step 13.** Update out of the RELE form.

- Colleague returns you to the PREL form.

**Step 14.** Detail on each ID in the Organization field and check on the RELE form for relationships that Colleague may have ended on the deceased date such as employments, contact relationships, and relationship roles. (All these relationships are ended when an individual is deceased).

**Step 15.** Remove the end dates where appropriate and update out of the RELE form for each organization thus checked.

- Colleague returns you to the PREL form.

**Step 16.** Update out of the PREL form.

**Step 17.** Access the Biographic Information (BIO) form for the person.

- Update the spouses' marital status in the Mar Stat field appropriately, if applicable.

**Step 18.** Access the Address Summary (ADSU) form for the person to restore any addresses that were moved to Former on the date the person was deceased.

**Step 19.** For non-employment, non-organization contact relationships, access the Relationship Roles (RERO) form to restore the roles that were ended on the date the person was deceased.

**Step 20.** Next, access the DMI Registry User Setup (DRUS) form to recreate the PERSON.PIN for the person.

**Step 21.** Save your work.

# South Dakota Colleague System Procedures

## Entering Privacy Codes

**Responsibility: University**

Privacy codes will restrict access to certain individuals based on office code assignment on the Staff Record. Privacy codes can only be set after written approval from the student/staff/faculty.

### **Step 1 - Access the Biographical Information (BIO) screen**

### **Step 2 - Enter the appropriate code only after documentation has been received and/or signed by the student**

- D Don't release address/phone
  - Phone and address should not be released in publications or distributions
  - Change the current address to former
    - See procedures for Adding/Changing an Person Address Record
- P Don't release phone number
  - Phone number should not be released in publications or distributions
- A Don't release address
  - Address should not be released in publications or distributions
  - Change the current address to former
    - See procedures for Adding/Changing an Person Address Record
- E Secure everything
  - Directory information should not be released in publications, distributions or over the phone
  - Change the current address to 'Do not Release Any Info on this Student'
    - As the web does not honor the privacy codes, this statement will indicate to users of the web that information on this student should not be given out.
- F Faculty
  - Faculty directory information should not be released in publications or distributions
  - Faculty with this code can be more restrictive than persons with the E code based on who is assigned the F code on the Staff Record.
- X Duplicate Record
  - Used for erroneous data entry of person record, i.e. duplicates

### **Step 3 - Update the BIO screen**

# South Dakota Colleague System Procedures

Revised 9/15/13
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## Entering Veteran's Information

Responsibility: University

### Step 1 – Access the Military Information (MINF) screen

### Step 2 – Enter Y/N if the individual has registered for the Selective Service

### Step 3 – Enter the veteran's Selective Service number

- Not used in SD at this time

### Step 4 - Enter the veteran's information by defining the following fields

Veteran Type

- Used to list the benefits used, by school code

Veteran Program

- Free form text to explain/define the benefit

Govt Benefits

- Not used in SD at this time

Start/End Dates

### Step 5 – Enter military status information by defining the following fields

Military Status

- Enter the active military status of the individual

Branch

- Enter the branch of military
- For example, Marines, Nat'l Guard, Navy, etc

Govt Benefits

- Enter any benefits that the individual receives

Start/End Dates

### Step 6 – Update the MINF screen



## Entering Emergency Information

**Responsibility: University**

**Timeframe: Ongoing; Prior to pre-registration**

### Step 1 – Access the Emergency Information (EMER) screen

### Step 2 – Enter Contact name, relationship, and phone number information

- If removing emergency information, simply delete the entire entry you wish to be removed.
- Contact Name:
  - Enter the Emergency Contact Name.
    - This field is a free form field and the person does not have to be in the Colleague database to enter their name here.
    - Naming convention is first name, space, last name with no punctuation
      - In the case where both parent names are listed: first name, space '&', space, first name, space, last name.
- Contact Relationship:
  - Enter the following values for relationship:
    - Mother
    - Father
    - Guardian
    - Spouse/Partner
    - Child
    - Relative (other than other values listed for relatives, ex Aunt)
    - Other
- Contact Phone Numbers:
  - Enter the Emergency Contact or Next of Kin evening phone and/or daytime phone and/or other phone
- Effective Date
  - Enter date the entered emergency contact info becomes effective

### Step 3 – Enter Hospital preference

### Step 4 – Enter any known Health Conditions

- For example: DI Diabetic
- Only enter information needed in the event of an emergency; a more complete list of health information may be entered on the PHIN screen

### Step 5 – Enter the Insurance Information

### Step 6 – Enter comments if desired.

### Step 7 – Update the EMER screen

### Step 8 – Update the FNM screen

## Entering PERSON Health Information

**Responsibility: University**

**Timeframe: Ongoing; Prior to pre-registration**

### Step 1 – Access the Emergency Information (PHIN) screen

### Step 2 – Enter Disability information

- Disability:
  - For example: HI Hearing Impairment
  - Enter the appropriate disability information, if provided. Lookup (...) and enter if appropriate.
- Disability Start/End Date
- Disability type:

### Step 4 – Enter Accommodation information

- Accommodation
- Accommodation Start/End Date
- Disability type:
  - The drop down box will only show the disability you selected in the above field; select this value that disability is contributing to the accommodation requested
- Accommodation Request Date:
- Accommodation Request Status
- Accommodation Status Date

### Step 5 – Enter Immunization Information

- Immunization
  - For example: RU Rubella--1st Immunization; RU2 Rubella--2nd Immunization
  - Encoding of required immunizations will be done in Health Services.
  - This field will be used in a rule to be evaluated at registration to determine if immunizations have been met.
  - Temporary waivers may be granted for no longer than one semester.
    - Temporary waivers should be assigned to track immunization requirements for early registered students.
    - Enter TWR and the begin date of pre-registration for that term
    - If the student does not fulfill the immunization requirement, the TWR should be removed by the university before the next pre-registration.
    - (New) Temporary waiver codes are to be removed prior to the start of the pre-registration for the upcoming semester.
  - Temporary waivers will allow registration.
  - When immunization requirements are fulfilled, the appropriate codes will be entered and TWR will no longer be utilized for this student.
  - Medical exemptions can be granted if appropriate documentation is provided.
- Immunization Date Completed

# South Dakota Colleague System Procedures

- Immunization Expiration Date

## **Step 6 – Enter Physical Information**

- SD is not using at this time as no drop down values are available to select

## **Step 7 – Enter comments if desired.**

## **Step 8 – Update the PHIN screen**

# South Dakota Colleague System Procedures

## **High-Level Procedure for Marking Person Duplicates as Resolved**

The following is a high-level procedure for resolving person duplicates within Colleague. Note that each step contains a reference to additional information about the particular step and form or process involved.

**Step 1.** Define duplicate criteria using the Duplicate Match Criteria (DUPC) form.

**Step 2.** Run the Locate Person Duplicates (LPDP) process in Colleague to create a record in the PERSON.DUPLICATES file for possible duplicates within Colleague's PERSON file. The LPDP process generates a report on what it processed.

**Step 3.** Optionally, run the Person Duplicates Report (PDPR) process to produce additional reports of possible duplicates within Colleague.

**Step 4.** Use Person Duplicates Summary (PDPS) form to view a list of possible duplicates for an individual.

**Step 5.** Detail from one of the possible duplicates on the PDPS form to access the Resolve Person Duplicates (RPDP) form where you can resolve the duplicates.

**Step 6.** Review the duplicates and process as indicated in the *Duplicate Cleanup Procedures* in the Appendix.

# South Dakota Colleague System Procedures

## Locating Duplicate Records Within Colleague

Responsibility: Universities/ESC

Timeframe: Monthly

Perform the following steps to locate duplicate records within the Colleague database.

**Step 1.** From Colleague Core, access the Locate Duplicate Records (LPDP) form.

**Step 2.** In the Duplicate Criteria field, enter the ID of the duplicate criteria record you want to use for selection.

- Enter S54AAI.IBIO.PERSON

**Step 3.** Do you have a saved list of Colleague PERSON records you want to use to select from? Saved list is recommended.

**Yes.** Enter the name of the saved list in the Saved List field. Key is Colleague IDs.

**No.** Enter separate Colleague PERSON ID records in the Person ID and Name fields.

**Step 4.** Do you want to specify additional selection criteria?

**Yes.** Enter **Yes** in the Additional Selection Criteria field.

**No.** Enter **No** in the Additional Selection Criteria field.

**NOTE:** If you leave the Saved List, Person ID and Name, and Additional Selection Criteria fields blank and run the LPDP process, you'll select all records in your PERSON file. This could take many hours to process.

**Step 5.** Save the information on the LPDP form.

- If you entered "Yes" in the Additional Selection Criteria field, Colleague opens the Additional Selection Criteria form so that you can enter the information you want.
- Update from the Additional Selection Criteria form.

# South Dakota Colleague System Procedures

## Reporting Duplicate Records Within Colleague

Responsibility: Universities/ESC

Timeframe: Monthly

Perform the following steps to report duplicate person records within the Colleague database.

**Step 1.** From Colleague Core, access the Person Duplicates Report (PDPR) form.

**Step 2.** Do you have a saved list of Colleague PERSON.DUPLICATES records you want to use to select from? A saved list is recommended.

**Yes.** Enter the name of the saved list in the Saved List field.

**No.** Enter separate Colleague PERSON ID records in the Person ID and Name fields.

**Step 3.** Do you want the PDPR process to select only those records with a specific current status? Valid codes are stored in the PERSON.DUPLICATE.STATUSSES validation code table.

**Yes.** Select one or more status codes in the Current Status field.

**No.** Leave the Current Status field blank.

**Step 4.** Do you want the PDPR process to select only those records with a specific duplicate category? Valid codes come from the Datatel-defined DUPL.CATEGORIES validation code table and are stored in the PDUP.CATEGORY field of the PERSON.DUPLICATES record.

**Yes.** Select a category code in the Duplicate Category field.

**No.** Leave the Duplicate Category field blank.

**Step 5.** If you want to select only those records whose duplicate rating value is between a certain range, enter the lower limit of the range in the Duplicate Rating Between Begin field and/or the upper limit of the range in the Duplicate Rating Between End field. You do not have to specify a lower or upper limit. However, if you do specify both, the value of the lower limit must be less than or equal to the value of the upper limit.

**Step 6.** If you did not specify a saved list in the Saved List field, enter the individual Colleague PERSON records whose corresponding PERSON.DUPLICATES records you want to select.

**Step 7.** Do you want to specify selection criteria in addition to any criteria you defined?

# South Dakota Colleague System Procedures

**Yes.** Enter **Yes** in the Additional Selection Criteria field.

**No.** Enter **No** in the Additional Selection Criteria field.

**Step 8.** Save the information on the PDPR form.

- If you entered “Yes” in the Additional Selection Criteria field, Colleague displays the Additional Selection Criteria form for you to enter the information you want. Update from the Additional Selection Criteria form.
- Review the report and determine which records you want to resolve.
- Continue with “Viewing Person Duplicates Within Colleague”.

# South Dakota Colleague System Procedures

## **Viewing Person Duplicates Within Colleague**

Responsibility: Universities/ESC

Timeframe: Monthly

After you run the Locate Person Duplicates (LPDP) form, you can view a list of the duplicates and possible duplicates for a particular Colleague PERSON record.

Use the Person Duplicates Summary (PDPS) form to display a list of duplicates and possible duplicates for a specific Colleague record. The PDPS form displays the ID and name of all duplicates, their associated category codes, rating values, and current statuses.



# South Dakota Colleague System Procedures

## Resolving Person Duplicates

Responsibility: Universities/ESC

Timeframe: Monthly

Perform the following steps to resolve duplicate person records within Colleague.

**Step 1.** From Colleague Core, access the Person Duplicates Summary (PDPS) form.

**Step 2.** From the Person field, detail from the duplicate you want to resolve to access the Resolve Person Duplicates (RPDP) form.

**Step 3.** Examine the information on the RPDP form.

**Step 4.** If you want to research the Colleague PERSON records, detail from the record to access one of the following Core demographic forms:

- Name and Address Entry (NAE)
- Biographic Information (BIO)
- Additional Demographics (DADD)
- Address Summary (ADSU)
- Institutions Attended Summary (IASU)
- Foreign Person Information (FINF)
- Emergency Information (EMER)

**Step 5.** Select an appropriate status from the New Status field. The following are the Datatel-delivered statuses:

- R Resolved Duplicate
- K Known non-duplicate

**Step 6.** If you want to add any comments about this resolution, do so in the Comments field. You can detail from the Comments field to access a multiline text editor.

**Step 7.** Save the information on the RPDP form.

**Step 8.** Process the duplicates as indicated in the *Duplicate Cleanup Procedures* in the Appendix.

**Step 9.** Remember to also address this duplicate in the EMAS, D2L and ImageNow modules.

# South Dakota Colleague System Procedures

## **STARFISH CONSIDERATIONS**

# South Dakota Colleague System Procedures

## **XSVM Record**

Refer to the CORE procedures section titled ‘Adding an XSVM Record’

## **Setting up Organizations**

Refer to the CORE procedures section titled “Adding a Campus Organization”

## **Assigning Advisors/Directors/Coaches/Tutors etc. to a Campus Organization**

Refer to the CORE procedures section titled ‘Adding or Ending an Advisor/Director/Coach/Tutor, etc. to a Campus Organization’

- With the implementation of Starfish, the following advisor/director/etc roles now exist to be assigned – keep in mind each of these assignments can span multiple terms and do not need to be updated each term; however, when personnel changes occur, the information needs to be updated so Starfish remains current:
  - Veteran Advisors need to be added to the campus org xVETA with a role of Advisor
  - ROTC Advisors need to be added to the campus org xROTC with a role of Advisor
  - TRIO Advisors need to be added to the campus org xTRIO with a role of Advisor
  - International Student Advisors need to be added to the campus org xINTA with a role of Advisor
  - Disability Services Directors need to be added to the campus org xDISB with a role of Director
  - Distance Ed Directors need to be added to the campus org xDSTD with a role of Director
  - Tutors need to be added to the campus org xTUTR with a role of Tutor
  - Tutor Coordinators need to be added to the campus org xTUTR with a role of Director
  - Athletic Directors need to be added to a single university campus org with type = ATHL with a role of Director
  - Coaches need to be added to the campus org for the appropriate sport with a role of Coach
  - Athletic Advisors need to be added to the appropriate university campus orgs of type = ATHL with a role of Advisor
  - Sioux Falls UC Director needs to be added to the campus org CSFD with a role of Director
  - Rapid City UC Director needs to be added to the campus org CRCD with a role of Director
  - Capital UC Director needs to be added to the campus org CPID with a role of Director
  - RIS/SDBOR need to be added to the campus org REGNT with a role of Director (only RIS may assign)
  - Counseling Center staff need to be added to the campus org xCOUN with a role of Advisor

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- Financial Aid staff need to be added to the campus org xFAID with a role of Advisor
- Student Services staff need to be added to the campus org xSSRV with a role of Advisor
- Success Center1 staff need to be added to the campus org xSSC1 with a role of Advisor
- Success Center2 staff need to be added to the campus org xSSC2 with a role of Advisor
- University Administration staff need to be added to the campus org xADMN with a role of Advisor
  
- Staff assigned to organizations also need:
  - An email address with type of PRI
  - A record in the WA registry
  
- If universities want the High Risk Attribute to be visible on their students in Starfish
  - The university needs to determine their own criteria for students ‘At Risk’
  - The At Risk students need to be added to the campus org xRSK with a role of Member

## **Removing Staff from a Campus Organization Assignment**

Refer to the CORE procedures section titled ‘Adding or Ending an Advisor/Director/Coach/Tutor, etc. to a Campus Organization’

## **Assigning Residence Hall Directors**

Refer to the Residence Life procedures section titled ‘Assigning Director of Residence Halls and individual Hall Directors’

## **Ending Residence Hall Director assignments**

Refer to the Residence Life procedures section titled ‘Ending Director of Residence Halls and Individual Hall Director Assignments’

## **Entering Faculty Assignments for First Time in System**

Refer to the CORE procedures section titled ‘Entering Initial Faculty Assignments’

## **Entering Faculty Assignments for those already in the System**

Refer to the CORE procedures section titled ‘Entering Additional Faculty Assignments’

## **Ending Faculty Assignments**

Refer to the CORE procedures section titled ‘Entering Faculty Assignments’

# South Dakota Colleague System Procedures

## **FOREIGN PERSON AND SEVIS REPORTING**

# South Dakota Colleague System Procedures

## Entering Foreign Person Information

**Responsibility: University**

**Timeframe: Ongoing; Prior to SEVIS reporting**

Follow the steps below to enter foreign person information.

**Note:** Eff F10, foreign students are required to enroll in a class to be eligible for student health insurance. For people who are not students such as exchange visitor/dependent (J1/J2 visa) or who graduate recently and are on OPT (optional practical training), they have to enroll in a zero credit pseudo course GS-900, if they want to sign up for insurance.

**Note:** Information from FPER is reported to SEVIS. Information from FINF is not.

The Foreign Person (FPER) screen is used to enter information about a foreign person who is reported to the INS through the SEVIS interface. If a person is not to be reported through SEVIS, do not detail to the NIIS screen or the EXVS screen. Entering information on the NIIS and EXVS may cause automatic reporting to the INS through the SEVIS interface.

Use the FINF screen to maintain information about a foreign person who is not reported to the INS. Use FINF to record undocumented aliens, for example. An undocumented alien should be processed similar to a RA or PR. The state and county should be filled appropriately, but the country will not need to be filled since these applicants can be handled by domestic admission.

### **Step 1 - Access the Foreign Person (FPER) screen.**

### **Step 2 - At the Person Lookup prompt, enter the SSN or Colleague ID.**

- If there is a person with that SSN or Colleague ID, the person's record information will automatically appear on the NAE screen.
- If there is not a person with that SSN, enter the partial name of the student to further clarify your search
- If the name search brings up a resolution screen, check the birthdate and/or SSN to make sure it is the right person.
- If a record is not found, enter the first 3 characters of the last name followed by a semicolon (;) followed by a blank space, then XH.PERS.HOME.PHONE followed by a blank space and the phone number enclosed in apostrophes and including hyphens. (ex: POM; XH.PERS.HOME.PHONE '605-225-0001'). If the last name is not legible, alternate versions of the first 3 characters may need to be used. Note some phone numbers are stored with \*'s instead of -'s.
- Once all the record search options have been used and the prospect is not in the system, type 'A' at the prompt to add a new person. This will take you to the NAE screen. Continue with the next step.
- If this person already exists on the Colleague database skip to Step 5

# South Dakota Colleague System Procedures

**Note:** Because duplicate records can cause serious problems for your institution, you must thoroughly search the database for an existing record for a person before you add a new record. Use Person LookUp and carefully follow search procedures for preventing duplicate records.

## Identifying Duplicate Records

- How do you know if you have a duplicate record?
  - Compare the SSN
    - Is it the same?
    - Is it close? Have the numbers been transposed?
  - Compare the Last, First, Middle name
    - Is it the same?
    - Is it close? What is the nickname? What are the other names?
  - Compare the birth date
    - Is it the same?
    - Is it close? Have the numbers been transposed?
  - Compare the address, including the e-mail address
    - Is it the same?
  - Compare the phone number
    - Is it the same?
  - Compare the high school graduation date
    - Is it the same?
  - Compare the academic history
    - Is it the same?
- If one or more of the above are the same – **STOP**
  - Provide the information that leads you to believe you have a duplicate record to the universities involved
  - Do Not process the record any further
  - The universities will continue with Step 2 in the Duplicate Record Cleanup Procedures

## Step 3 – Define the following fields on NAE

**Enter the name and any suffix the person has indicated.**

### Legal Name

- In the order of Last Name, First Name and Middle Name if the student has provided the information.
  - Add nicknames in the Nickname field on BIO which you can access from NAE by detailing on the Last Name field.
- Enter the names exactly as they appear on the contact card.
- Use the punctuation documentation if a name has a hyphen or apostrophe and you are not sure of the correct way to enter the name.
  - If a student has two or more capital letters in their last name (McDonald), instead of typing Mc\_Donald, type =McDonald.
    - Using an equal sign guarantees the name will save exactly as you typed it.
      - This will overwrite Colleague's capitalization rules.

# South Dakota Colleague System Procedures

## **Suffix**

- Enter only if the student lists a suffix at the end of their name
  - ex. Jr, Sr, III.
- Otherwise leave this field blank.

## **Enter the home address**

**Note:** Former addresses are to be retained.

- When entering the permanent home (HOM) address
  - When entering an address on the NAE screen, the address type defaults to HOM.
  - Use no more than 2 lines for the address.
    - If the address has a PO Box and a street address, enter the PO Box only on the 1<sup>st</sup> line. The street address is entered as a FAM address type – see Step 6.

**Note:** It is recommended that a street address be obtained for an international student that is reported to SEVIS as SEVIS will not accept a PO Box.

- Do not use punctuation when entering the address.
- **Enter the zip code (excluding foreign zips except for Canada & Mexico)**
  - Enter the Zip code in the City element and city and state will automatically be filled. Check the city/state/zip information that's returned for validity.
  - If no information is returned for zip code, enter city name in City, the State code and the Zip code. Verify correct spelling of city name when adding.
- Detailing allows for storing multiple addresses. (See Adding/Changing an Address in Core).
- The system will default the address type to HOM and set the preferred mailing and address flags to 'Yes'.

## **Enter other addresses (other than HOM)**

- Detail on the address field. If ADSU displays, detail on a new line to ADR.
- On ADR, enter the address information using the following address types as appropriate: Current Mailing Address use (LOC), Next of Kin address (FAM), Foreign (FOR).
  - See the Associating Address Type Codes to Addresses procedure in CORE for a definition and usage of address types
- See Adding/Changing an Address in Core.
- 
- If the Next of Kin address is different from the Permanent Address, enter the Next of Kin address and indicate (FAM) Family for address type.
- 
- If both the Permanent and the Current Address are the same, list the address only once using (HOM) Permanent Home and indicate "Y" as Preferred.



## South Dakota Colleague System Procedures

- At the time of application, duplicate address will not be entered. But, students have opportunities electronically to update their address. If a student enters the same address twice, it will not be audited for and removed.
- When an address is changed on ADR, a prompt to retain address history and an address change source will display. Retain address history and use the appropriate address change source. For example, if the source of the new address is the application, use Application (APP), use Student (STU) if the source is from the student directly via email or verbal etc. Use correction (COR) only when there is a genuine mistake that needs to be corrected.

### Enter the foreign address and type

**Note:** Per Postal Regulations, the full address should be typed or legibly written in English and should be placed lengthwise on one side of the item whether it is an address label or envelope. An address in a foreign language is permitted if the names of the city, province and country are also indicated in English. The last line of the address block area must include only the complete country name (no abbreviations) written in uppercase letters. Following is the order of information for the destination address:

The following are examples of properly formatted delivery addresses:

MS JOYCE BROWNING	MR JACQUES MOLIERE
2045 ROYAL ROAD	RUE DE CHAMPAIGN
LONDON WIP 6HQ	076570 ST PAUL
ENGLAND	FRANCE

Regarding mail to Canada, the location of the country name and postal code are interchangeable with US Postal formatting; either one may be placed on the last line, with the other placed after the city and provincial name. Following are examples of destination addresses to Canada:

MS HELEN SAUNDERS	MS HELEN SAUNDERS
1010 CLEAR STREET	1010 CLEAR STREET
OTTAWA ON K1A OB1	OTTAWA ON CANADA
CANADA	K1A OB1

Following is the order of entering information for the destination address

LINE 1: NAME OF ADDRESSEE

- Name of student entered on NAE

LINE 2: STREET ADDRESS OR POST OFFICE BOX NUMBER

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- Enter on the Address field line 1 on ADR
- Do not enter the street address and box number on the same line.
  - SEVIS requires a physical address, not a box number

LINE 3: CITY OR TOWN NAME, OTHER PRINCIPAL SUBDIVISION  
(i.e., PROVIDENCE, STATE, COUNTY, etc).

- Enter the city name in City and the state code in State on ADR.
- For countries besides Canada and Mexico, enter the province/state (if any) with the City and leave State blank.

LINE 4: COUNTRY NAME (UPPERCASE LETTERS IN ENGLISH)

- Enter the country code in the Country field on ADR.
- For foreign addresses, enter the address type as FOR on the ADR screen.

## **Enter the Residence county and state code**

Use the “legal address” (permanent address) at the time of the application as the source for completing the State/County of Origin. The resident county and state fields (#6) on NAE and the residence state and residence county fields on DADD (#9 & #10) are the same fields.

Entry of residency information at the time of initial application:

- Enter the residence state code using the permanent address as the source.
- Enter the residence county only if the applicant is a SD resident using the permanent address as the source.
- These fields are used to retain the original residency information for a student.
- The residency status on the application (APPN) should match the residence state i.e. ‘R’ Resident if SD and ‘N’ if other than a SD resident.

**Note:** Students can be in the military service without being a US citizen. The coding for non US citizens in the military is residence state of AA and Residence country of US to be valid with an alien status of Y and F1 immigration status.

Entry of residence information for subsequent applications:

- If the student did not attend any regental university as a result of the initial application:
  - Enter the residence state code using the permanent address as the source.
  - Enter the residence county only if the applicant is a SD resident using the permanent address as the source.
- If the student did attend any regental university and is now returning after an absence, do not change the residence state code on NAE or DADD. If the student is becoming a SD resident, the county field will need to be updated with the SD county.
- Instead, if the new state code is different than the original residence state, enter the new state in the person origin field on NAE using the permanent

# South Dakota Colleague System Procedures

address as the source. Do not change the origin county unless this student is becoming a resident and there was not a SD county listed.

- The residency status on the application (APPN) and (ASPR) should match the state recorded in either the person origin field or the residence state field.

The IPEDs definition is as follows:

State of residence - Use the state identified by the student as his/her permanent address at the time of application to the institution. This may be the legal residence of a parent or guardian, or the state in which a student has a driver's license or is registered to vote. It is not necessarily the state in which the student's high school is located.

## Enter the country

**NOTE:** If the applicant is a resident alien, enter "US" only after a photocopy of the valid Resident Alien Card is received. Until the valid Resident Alien Card is received, enter the country the applicant is a citizen of. Enter non-resident until the valid Resident Alien Card is received.

**NOTE:** If the applicant checks "other" for citizenship, the application and any other documentation received will be forwarded to the appropriate campus' international student advising office.

**Note:** Students can be in the military service without being a US citizen. The coding for non US citizens in the military is residence state of AA and Residence country of US to be valid with an alien status of Y and F1 immigration status.

## Enter the phone number, extension and type

- Enter the phone number including area code.
- Do not use any dashes or parenthesis,
- Ex. 6056262544 would be an accurate way to enter the phone number for the admissions office.
- Phone numbers of hearing impaired persons may be stored with \*'s and/or with 'text' at the end so as to signify this person cannot receive a phone call placed in the usual manner and alternate means of communication will be needed. The phone number can be entered as 605\*626\*2544, 605\*626\*2544text or 6056262544text
- Only use the extension field if an extension is given (rarely).
- Enter the type of phone number. Press F1 twice to list the valid codes.
- Use 'H' for Home; 'L' for Local; 'F' for a foreign; 'B' for business;
- International phone numbers can be entered here and do not need to follow US and Canadian formatting of phone numbers.

## Origin and date of contact

- The origin/date field on NAE will no longer be used for origin information.
  - ⊖ Origin, in the merged environment, will be entered and stored as smart-coded communication management codes to allow them to be secured by

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university through the use of office codes. Enter xACOR and ..., where 'x' is the identifier for your university to see a list of codes for your university.

- ESC will enter the xACORAP (where 'x' represents the university) on PRSP for applicants who have no NAP records already for a specific university.
- To enter the origin on the Prospect Summary (PRSP) screen, access the Comm Code field and enter the appropriate code.
- To enter the origin on the Communication Code Entry (CRI) screen, enter the appropriate code on a blank line.
- Follow university procedures for entering this information.
- Use the origin field for the student's most recent resident state of origin (originally stored in the driver's license field on DADD).
  - Enter the student's most recent state of origin if only if it is different than the initial origin which is coded in the state of residence field.
  - Enter the date the most recent state of origin is applicable

## **Enter the social security number**

- Enter the social security number if it is available.
- You do not need to add any dashes as Colleague will automatically add the dashes for you.
- If the SSN on the application differs from the SSN in Colleague, do not update at this time. A letter will be sent requesting a photocopy of the applicant's SS Card
- If the SSN matches another in Colleague a pop up box will appear with the Colleague ID and name of the person that number is assigned to.

## **Enter the birth date**

- Enter the birth date without slashes
  - Ex. 031369.
  - If the month or day is 9 or less, add a zero to the front of the number.
  - Format MM/DD/YYYY
    - If prior to 1930, all four digits of the year must be entered

## **Enter the ethnic/race/gender codes**

**This information must be entered to avoid errors in the extract.**

- Entering ethnic/race code(s)
  - Enter Ethnic(s) Code
    - Ethnic(s) may be entered but is not required.
    - Enter ethnicity HL for Hispanic/Latino
    - Enter ethnicity NHL for Non-Hispanic/Latino
    - Access the drop-down box to see the list of valid values.
  - Enter Races(s) Code
    - Race may be entered but is not required
    - Enter as many races as apply.

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- Access the drop-down box to see the list of valid values.
- Archived Ethnic
  - It is no longer necessary to record this information.
- If “do not wish to respond” is marked
  - No ethnic code is entered
  - No race code is entered
- Enter the gender code
  - Gender is an ‘F’ for female and ‘M’ for Male.
  - Also, if the gender is obvious from the first and middle names, you can use that information to record gender if it is not listed on the prospect information.

## **Enter the address and type if available**

- Enter the applicant’s e-mail address and type(s).
- Prospect email type and address
  - An email address will be entered for every university the prospect is interested in.
  - At least one email address should be entered using the university-specific email type.
  - If used, the PRI email address should be entered in the first line.
  - Change the PRI and WEB address only after confirmation from the prospect.
- Enter the applicant’s e-mail address type(s).
  - The type of e-mail address will be smart coded by university. For example, SE for SDSU, BE for BHSU, and DE for DSU. Look up using university identifier and ‘...’, Ex. B...
    - xE will be used for the university specific (.edu) e-mail address
    - xE2 will be used for a personal e-mail address
  - The PRI email type may be entered for a prospect but is not required unless Communications Management is used to send prospect email messages. PRI is the default email type specified on PID2 for the system.
  - The WEB email type may be entered at this time but is not required.
- Enter the email address(es)
  - Use exact case and punctuation.
  - When changing the PRI e-mail address, enter the original address in the comments field on the Prospect Summary (PRSP) screen. Date and time stamp the comment and then enter the previous email address.

## **Enter the preferred name, mail name and other LFM name field**

- Preferred name
  - Automatically defaults to the name originally entered into Colleague.
    - If the preferred name was changed through a name change, the new name will not default in. This will need to manually need to be changed to reflect the name change.
  - Enter the preferred name only if it differs from the full legal name.

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- An example of this would be if a person's given name was Theodore James but they go by TJ.
- Mail name
  - Automatically defaults to the name originally entered into Colleague.
  - Only used if someone gives us a preferred mailing name.
- Other LFM
  - If provided, enter the nicknames in the Nickname field on BIO which you can access from NAE by detailing on the Last Name field.
  - List every other or former name the applicant has ever used to reduce the chances of duplicates in the Other LFM field

## **Enter an address source and date**

- Audit trail of who made changes and when.
- Required field if changes are made.
  - When an address is changed on ADR, a prompt to retain address history and an address change source will display. Retain address history and use the appropriate address change source. For example, if the source of the new address is the application, use Application (APP), use Student (STU) if the source is from the student directly via email or verbal etc. Use correction (COR) only when there is a genuine mistake that needs to be corrected.

## **Update the NAE screen**

- The FPER screen is displayed

**Note:** This procedure assumes that the information entered on this screen should be reported to the INS using the SEVIS interface.

## **Step 4 - Enter the following required information:**

- Alien Status
  - Enter Y if this person is not a US citizen
  - Enter the person's alien registration number
    - Enter Alien and INS Admission Number or I-94 Number
- Citizenship Country
  - Enter the primary citizenship of the person
    - A person who is classified as a PR, RA or A1 is NOT a US citizen. Therefore, the Citizenship Country needs to be the country the student came from (typically it is the country on the PR card, I-94 documentation of departure, etc) and the Residence Country is US.

## **Step 5 - Complete the rest of the screen as appropriate.**

- Resident Country
  - Enter this person's country of residence
    - A person who is classified as a PR, RA or A1 are NOT US citizens. Therefore, the Citizenship Country needs to be the country the student came from (typically it is the country on

# South Dakota Colleague System Procedures

the PR card, I-94 documentation of departure, etc) and the Residence Country is US.

- Immigration Status
  - Enter this person's immigration status
  - For example, PR, F1, F2

**Note:** Immigration Status and Visa Type both have H1, H4, and PR so they will need to be kept in sync.
- Country Entry Date
  - Enter the date this person entered the US
- Travel Documents
  - Detail to the Travel Documents (TRVD) screen
  - Define the following fields
    - Visa Type
      - Enter the resident non-citizen's visa type
      - For example, F1, F2
    - Visa Number
      - Enter the visa number.
      - It is used for reporting to the US Immigration and Naturalization Service.
      - A visa type must be entered to be able to enter this visa number.
    - Visa Issue Date
      - Enter the date the I-20 was sent or the beginning date on the IAP66
    - Visa Expiration Date
      - Enter the I-20 expiration date or ending date on IAP66
    - Visa Issuing Post
      - This is the place where the visa was issued to the person.
      - A visa type is required to be able to enter this code.
      - When visa information is reported to SEVIS, the values in this field are reported directly with no translation.
    - Visa Issuing Country
      - Enter the country that issued the visa
      - A visa type is required to be able to enter this code.
    - Admission Number
      - Enter the I-94 number from the I-94 entry document form
      - The I-94 number is the number INS uses to track the student. It is used in reporting to the INS.
    - Passport Number
      - Enter the passport number
      - This is the identification number of the person's passport. It is used for reporting to the US Immigration and Naturalization Service.

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- Passport Issuing Country
    - Enter the country that issued the passport
  - Passport Expiration Date
    - Enter the date the passport expires
  - Port of Entry
    - The point of entry (POE) is the location in the United States where the person entered the US.
    - It is used for reporting to the US Immigration and Naturalization Service.
  - Country Entry Date
    - Defaults from FPER
  - Drivers License Number
    - Enter the drivers license number of the person
  - Drivers License State
    - Enter the drivers license state
  - Update the TRVD screen
  - The FPER screen is re-displayed
- Birth City
    - Enter the city the person was born in
  - Birth Country
    - This is the country in which the person was born.
    - It is used for reporting to the US Immigration and Naturalization Service.
    - It is a required field for the Student and Exchange Visitor Information System (SEVIS).
  - Native/Primary/Secondary Language
    - Use for English only in the primary language field
    - Do not populate other languages
  - No Yrs Inst Home Language Instr/Inst Home Language Instr Country
    - Enter the number of years that person has been at an institution that instructed in the English language
    - Enter the country they were instructed in with the English language
  - Nonimmigrant Intl Student
    - Detail to the Nonimmigrant Intl Student (NIIS) screen
- Note:** If the person is not an applicant/student, you are not allowed to enter information on this screen.
- Define the following fields
  - Form Purpose
    - Immigration forms (such as the Certificate of Eligibility for Nonimmigrant (F-1) Student, the I-20 form in the US) often have to be submitted on a periodic basis. This field specifies why the form is being submitted, such as initial attendance, continued attendance, etc.
    - This field is used in US Immigration and Naturalization Service Student and Exchange Visitor Information System (SEVIS) reporting.



# South Dakota Colleague System Procedures

- A value with a special processing code of 16 is a termination. This is normally set by Colleague based on a termination transaction being successfully processed by SEVIS. A non-immigrant student whose form purpose has a value with a special processing code of 16 is never again reported to SEVIS. If the form purpose needs to be set to terminate a student, then the value must also have a special processing code 2 in the SEVIS.FORM.PURPOSES validation code table in Core. That special processing code 2 must be a valid Student Termination Reason Code from Appendix K of the Interface Control Document SEVIS specifications.
- If this field is set to a termination value, then any of the student's spouse and children that were reported to SEVIS will also be affected. The relation status of the RELATION records will be set to the first Orig Code value in the SEVIS.DEP.END.REASONS translation table on FLTT whose New Code entry is 06. This will cause terminate dependent transactions to be reported to SEVIS. If such an entry is not found, an error message will be displayed and the student cannot be terminated until the entry is put in the translate table so that the dependents can also be terminated.
- The form purpose should not be changed once a Deceased Date has been entered on BIO, Biographic Information, for the person since that would have generated a termination. If the deceased date was entered for the wrong person, remove the Deceased Date from BIO before changing the form purpose.
- Academic Program LookUp
  - LookUp ... will populate this field or provide a resolution screen if there is more than one program
  - This field is used in US Immigration and Naturalization Service reporting.
- Term Length
  - Enter/review the length of the term in months
  - Defaults from APRI or SEVP but can be changed here
- Home Language Proficient
  - This should only be set to Y if person is determined to meet any language proficiency requirements set.
  - Set to N if the person needs to meet proficiency requirements but has not yet done so.
  - Leave blank if the student is not required to be proficient in the home institution language.

# South Dakota Colleague System Procedures

- This field is used to report to the US Immigration and Naturalization Service for the Student and Exchange Visitor Information System (SEVIS).
- Home Language Not Required
  - Enter the reason why mastery of the Home language is not required
- Designated School Official
  - Enter the Colleague ID of the designated school official
  - This person's SEVP ID is what is reported to the US Immigration and Naturalization Service (INS).
  - Defaults from the Default DSO on the SEVIS Parameters (SEVP) screen and can be changed as needed.
  - The person entered here must have an entry in alternate ID Types on DADD that matches the DSO Alt ID Type on SEVP.
- Expense types and amounts
  - Enter the types of expenses (tuition, living, etc.) and amounts that the person is expected to incur while attending the institution.
  - They are used to report estimated expenses to the US Immigration and Naturalization Service (INS).
- School code
  - Enter/review the 15 character school code
  - Defaults from SEVA but can be changed
- Conviction term
  - Enter the term the person received a criminal conviction
  - Once this is reported, it can't be changed
- Addnl I-20 Info
  - Detail to record additional information such as
    - ISPT Intl Student Part Time Auths
    - EMPL Employment Information
    - FPFN Foreign Person Funding
    - SEVF SEVIS Forms
- Comments
  - Date and time stamp first, then
  - Add any applicable comments
- Update the NIIS screen
- The FPER screen is re-displayed
- Communications Mgmt
  - Detail to assign communication mgmt codes for this person

## Step 6 – Update the FPER screen.

# South Dakota Colleague System Procedures

## **International Student Health Insurance – Waiving & Auto-Enrolled Students**

**Responsibility: University/SDBOR Human Resource Director**

**Timeframe: Ongoing**

### Waivers

Waivers for international student health insurance will be recorded in Colleague on the “STMC” Student Miscellaneous Comment screen, field MISC8. Waiver codes need to be entered for each term the waiver is in effect. For 2010, the codes will be entered as follows:

CODE	DESCRIPTION	
W10FA 2010	Insurance Waiver 10FA	Insurance waived for Fall
W11SP 2010	Insurance Waiver 11SP	Insurance waived for Spring

After entering the code on STMC, Field MISC8, the student will be excluded from the list of international students who need health insurance. The exclusion will be for the term entered. This is a multi-valued field, therefore each term a new code will be entered noting the term waived. If the student is waived for the entire academic year, please add all applicable terms. The codes will remain on the student's record.

The waivers will be entered by the student’s home location International Student Advisor/staff. The codes will be added to the student’s record after Waiver approval by the SDBOR Director of Human Resources. Waivers are to be granted for one semester. Students with special circumstances must apply for a student health insurance waiver each term they are enrolled. Under certain circumstances a student may be permanently waived because of employment with the university. This will be determined by the SDBOR Director of Human Resources and appropriate term codes will be added to the student’s record.

### Auto-Enrolled Students

International students who do not sign up for the SDBOR student health insurance will automatically be enrolled in insurance on the 15<sup>th</sup> day of the special enrollment period each term. In the fall term, students will automatically be enrolled in the Annual plan. Students who are new in the spring will be auto-enrolled in the Spring/Summer plan.

RIS will provide a report which identifies international students who are not waived and have not enrolled in insurance. This report will be made available to university personnel so international student advisors can run it ongoing and use the information when counseling students regarding insurance enrollment.

# South Dakota Colleague System Procedures

When a student is auto-enrolled, a code needs to be entered in Colleague on STMC, field MISC8. Codes need to be entered each time a student is auto-enrolled in insurance. For 2010, the codes are as follows:

CODE	DESCRIPTION
A10FA	Ins Auto Enroll 10FA Auto enrolled in insurance Fall 2010
A11SP	Ins Auto Enroll 11SP Auto enrolled in insurance Spring 2011

The codes will be entered by the student's home location International Student Advisor/staff, from a list provided by the SDBOR Director of Human Resources.

A student can initiate the waiver process any time throughout the special enrollment period. At the end of the thirty-day period, waivers can no longer be initiated. If a student has been auto-enrolled and then is subsequently approved for a waiver, the Auto Enroll code needs to be removed from their STMC screen and the Waiver code added.

# South Dakota Colleague System Procedures

## **Entering Foreign Person Funding Information**

**Responsibility: University**

**Timeframe: Ongoing; Prior to SEVIS reporting**

Follow the steps below to enter funding information for a foreign person.

**Step 1 - Access the Foreign Person Funding (FPFN) screen from the Nonimmigrant Intl Student (NIIS) screen or the Exchange Visitor (EXVS) screen.**

**Step 2 - Select a Funding Source.**

**Step 3 - Enter an amount.**

**Step 4 - Enter a description or comments related to the funding if necessary.**

**Step 5 - Repeat Step 2 through Step 4 for each funding source.**

**Step 6 – Update the FPFN screen.**

# South Dakota Colleague System Procedures

Revised 2/16/07
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## Entering Exchange Visitor Information

**Responsibility: University**

**Timeframe: Ongoing; Prior to SEVIS reporting**

Follow the steps below to enter information about an exchange visitor.

### Step 1 - Access the Exchange Visitor (EXVS) screen.

### Step 2 - At the person lookup prompt, enter the SSN or the Colleague Id of the person.

- If there is a person with that SSN or Colleague ID, the person's record information will automatically appear on the NAE screen.
- If there is not a person with that SSN, enter the partial name of the exchange visitor to further clarify your search
- If the name search brings up a resolution screen, check the birthdate and/or SSN to make sure it is the right person.
- If a record is not found, enter the first 3 characters of the last name followed by a semicolon (;) followed by a blank space, then XH.PERS.HOME.PHONE followed by a blank space and the phone number enclosed in apostrophes and including hyphens. (ex: POM; XH.PERS.HOME.PHONE '605-225-0001'). If the last name is not legible, alternate versions of the first 3 characters may need to be used. Note some phone numbers are stored with \*'s instead of -'s.
  - Once all the record search options have been used and the applicant is not in the system, type 'A' at the prompt to add a new applicant. This will display the NAE screen. Continue with the next step.

**Note:** Because duplicate records can cause serious problems for your institution, you must thoroughly search the database for an existing record for a person before you add a new record. Use Person LookUp and carefully follow search procedures for preventing duplicate records.

### Step 3 – Define the following fields on NAE

**Enter the name and any suffix the person has indicated.**

#### Legal Name

- In the order of Last Name, First Name and Middle Name if the student has provided the information.
  - Add nicknames in the Nickname field on BIO which you can access from NAE by detailing on the Last Name field.
- Enter the names exactly as they appear on the contact card.
- Use the punctuation documentation if a name has a hyphen or apostrophe and you are not sure of the correct way to enter the name.
  - If a student has two or more capital letters in their last name (McDonald), instead of typing Mc\_Donald, type =McDonald.
    - Using an equal sign guarantees the name will save exactly as you typed it.
      - This will overwrite Colleague's capitalization rules.

# South Dakota Colleague System Procedures

## Suffix

- Enter only if the student lists a suffix at the end of their name
  - ex. Jr, Sr, III.
  - Otherwise leave this field blank.

## Enter the address

**Note:** Former addresses are to be retained.

- When entering the permanent home (HOM) address
  - When entering an address on the NAE screen, the address type defaults to HOM.
  - Use no more than 2 lines for the address.
    - If the address has a PO Box and a street address, enter the PO Box only on the 1<sup>st</sup> line. The street address is entered as a FAM address type – see Step 6.

**Note:** It is recommended that a street address be obtained for international students that are reported to SEVIS as SEVIS will not accept a PO Box.

- Do not use punctuation when entering the address.
- **Enter the zip code (excluding foreign zips except for Canada & Mexico)**
  - Enter the Zip code in the City element and city and state will automatically be filled. Check the city/state/zip information that's returned for validity.
  - If no information is returned for zip code, enter city name in City, the State code and the Zip code. Verify correct spelling of city name when adding.
- Detailing allows for storing multiple addresses. (See Adding/Changing and Address in Core).
- The system will default the address type to HOM and set the preferred mailing and address flags to 'Yes'.

When entering an address other than the permanent home (HOM);

- Detail on the address field. If ADSU displays, detail on a new line to ADR.
- On ADR, enter the address information using the following address types as appropriate: Current Mailing Address use (LOC), Next of Kin address (FAM), Foreign (FOR).
  - See Associating Address Type Codes to Addresses procedure in CORE for a definition and usage of address types
- See Adding/Changing an Address in Core.

If the Next of Kin address is different from the Permanent Address, enter the Next of Kin address and indicate (FAM) Family for address type.

If both the Permanent and the Current Address are the same, list the address only once using (HOM) Permanent Home and indicate "Y" as Preferred.

# South Dakota Colleague System Procedures

- At the time of application, duplicate address will not be entered. But, students have opportunities electronically to update their address. If a student enters the same address twice, it will not be audited for and removed.

## **Enter the Residence county and state code**

Use the “legal address” (permanent address) at the time of the application as the source for completing the State/County of Origin. The resident county and state fields (#6) on NAE and the residence state and residence county fields on DADD (#9 & #10) are the same fields.

Entry of residency information at the time of initial application:

- Enter the residence state code using the permanent address as the source.
- Enter the residence county only if the applicant is a SD resident using the permanent address as the source.
- These fields are used to retain the original residency information for a student.
- The residency status on the application (APPN) should match the residence state i.e. ‘R’ Resident if SD and ‘N’ if other than a SD resident.

Entry of residence information for subsequent applications:

- If the student did not attend any regental university as a result of the initial application:
  - Enter the residence state code using the permanent address as the source.
  - Enter the residence county only if the applicant is a SD resident using the permanent address as the source.
- If the student did attend any regental university and is now returning after an absence, do not change the residence state code on NAE or DADD. If the student is becoming a SD resident, the county field will need to be updated with the SD county.
- Instead, if the new state code is different than the original residence state, enter the new state in the person origin field on NAE using the permanent address as the source. Do not change the origin county unless this student is becoming a resident and there was not a SD county listed.
- The residency status on the application (APPN) and (ASPR) should match the state recorded in either the person origin field or the residence state field.

The IPEDs definition is as follows:

State of residence - Use the state identified by the student as his/her permanent address at the time of application to the institution. This may be the legal residence of a parent or guardian, or the state in which a student has a driver’s license or is registered to vote. It is not necessarily the state in which the student’s high school is located.



# South Dakota Colleague System Procedures

## **If this is an international student, enter the country**

**NOTE:** If the applicant is a resident alien, enter “US” only after a photocopy of the valid Resident Alien Card is received. Until the valid Resident Alien Card is received, enter the country the applicant is a citizen of. Enter non-resident until the valid Resident Alien Card is received.

**NOTE:** If the applicant checks “other” for citizenship, the application and any other documentation received will be forwarded to the appropriate campus’ international student advising office.

## **Enter the phone number, extension and type**

- Enter the phone number including area code.
- Do not use any dashes or parenthesis,
- Ex. 6056262544 would be an accurate way to enter the phone number for the admissions office.
- Phone numbers of hearing impaired persons may be stored with \*’s and/or with ‘text’ at the end so as to signify this person cannot receive a phone call placed in the usual manner and alternate means of communication will be needed. The phone number can be entered as 605\*626\*2544, 605\*626\*2544text or 6056262544text.
- Only use the extension field if an extension is given (rarely).
- Enter the type of phone number. Press F1 twice to list the valid codes.
- Use ‘H’ for Home; ‘L’ for Local; ‘F’ for a foreign; ‘B’ for business;
- International phone numbers can be entered here and do not need to follow US and Canadian formatting of phone numbers.

## **Origin and date of contact**

- The origin/date field on NAE will no longer be used for origin information.
  - Origin, in the merged environment, will be entered and stored as smart-coded communication management codes to allow them to be secured by university through the use of office codes. Enter xACOR and ..., where ‘x’ is the identifier for your university to see a list of codes for your university.
    - ESC will enter the xACORAP (where 'x' represents the university) on PRSP for applicants who have no NAP records already for a specific university.
  - To enter the origin on the Prospect Summary (PRSP) screen, access the Comm Code field and enter the appropriate code.
  - To enter the origin on the Communication Code Entry (CRI) screen, enter the appropriate code on a blank line.
  - Follow university procedures for entering this information.
- Use the origin field for the student’s most recent resident state of origin (originally stored in the driver’s license field on DADD).
  - Enter the student’s most recent state of origin if only if it is different than the initial origin which is coded in the state of residence field.

# South Dakota Colleague System Procedures

- Enter the date the most recent state of origin is applicable

## **Enter the social security number**

- Enter the social security number if it is available.
- You do not need to add any dashes as Colleague will automatically add the dashes for you.
- If the SSN on the application differs from the SSN in Colleague, do not update at this time. A letter will be sent requesting a photocopy of the applicant's SS Card
- If the SSN matches another in Colleague a pop up box will appear with the Colleague ID and name of the person that number is assigned to.

## **Enter the birth date**

- Enter the birth date without slashes
  - Ex. 031369.
  - If the month or day is 9 or less, add a zero to the front of the number.
  - Format MM/DD/YYYY

## **Enter the ethnic/race/gender codes**

**This information must be entered to avoid errors in the extract.**

- Entering ethnic/race code(s)
  - Enter Ethnic(s) Code
    - Ethnic(s) may be entered but is not required.
    - Enter ethnicity HL for Hispanic/Latino
    - Enter ethnicity NHL for Non-Hispanic/Latino
    - Access the drop-down box to see the list of valid values.
  - Enter Races(s) Code
    - Race may be entered but is not required
    - Enter as many races as apply.
    - Access the drop-down box to see the list of valid values.
  - Archived Ethnic
    - It is no longer necessary to record this information.
  - If "do not wish to respond" is marked
    - No ethnic code is entered
    - No race code is entered
- Enter the gender code
  - Gender is an 'F' for female and 'M' for Male.
  - Also, if the gender is obvious from the first and middle names, you can use that information to record gender if it is not listed on the prospect information.

## **Enter the e-mail address and type if available**

- Prospect email type and address

# South Dakota Colleague System Procedures

- An email address will be entered for every university the prospect is interested in.
- At least one email address should be entered using the university-specific email type.
- If used, the PRI email address should be entered in the first line.
- Change the PRI and WEB address only after confirmation from the prospect.
- Enter the applicant's e-mail address type(s).
  - The type of e-mail address will be smart coded by university. For example, SE for SDSU, BE for BHSU, and DE for DSU. Look up using university identifier and '...', Ex. B...
    - xE will be used for the university specific (.edu) e-mail address
    - xE2 will be used for a personal e-mail address
  - The PRI email type may be entered for a prospect but is not required unless Communications Management is used to send prospect email messages. PRI is the default email type specified on PID2 for the system.
  - The WEB email type may be entered at this time but is not required.
- Enter the email address(es)
  - Use exact case and punctuation.
  - When changing the PRI e-mail address, enter the original address in the comments field on the Prospect Summary (PRSP) screen. Date and time stamp the comment and then enter the previous email address.

## **Enter the preferred name, mail name and other LFM name field**

- Preferred name
  - Automatically defaults to the name originally entered into Colleague.
    - If the preferred name was changed through a name change, the new name will not default in. This will need to manually need to be changed to reflect the name change.
  - Enter the preferred name only if it differs from the full legal name.
    - An example of this would be if a person's given name was Theodore James but they go by TJ.
- Mail name
  - Automatically defaults to the name originally entered into Colleague.
  - Only used if someone gives us a preferred mailing name.
- Other LFM
  - If provided, enter the nicknames in the Nickname field on BIO which you can access from NAE by detailing on the Last Name field.
  - List every other or former name the applicant has ever used to reduce the chances of duplicates in the Other LFM field

## **Enter an address source and date**

- Audit trail of who made changes and when.
- Required field if changes are made.
  - When an address is changed on ADR, a prompt to retain address history and an address change source will display. Retain address history and use

# South Dakota Colleague System Procedures

the appropriate address change source. For example, if the source of the new address is the application, use Application (APP), use Student (STU) if the source is from the student directly via email or verbal etc. Use correction (COR) only when there is a genuine mistake that needs to be corrected.

## **Update the NAE screen**

- The EXVS screen is displayed

**Note:** This procedure assumes that the information entered on this screen should be reported to the INS using the SEVIS interface.

**Step 4 - Enter a program along with the start and end dates for when the person is participating in the program.**

**Step 5 - Enter the appropriate information on the screen.**

- The sponsor and sponsor agencies default from the SEVIS Parameters (SEVP) screen and can be overridden if necessary.
- Additional information may default based on information entered on the Foreign Person (FPER) screen, such as Birth Country and Citizenship Country, and can be changed is necessary.

**Step 6 – Update the EXVS screen.**

# South Dakota Colleague System Procedures

## **Authorizing Part Time Registration of Foreign Students**

**Responsibility: University**

**Timeframe: Ongoing; Prior to SEVIS reporting**

Follow the steps below to authorize a student to fall below a full course load.

**Note:** A student must be authorized to take less than a full course load before the student can do so, otherwise the student could be reported to the INS as terminated.

**Step 1 - Access the Intl Student Part Time Auth (ISPT) screen from the Nonimmigrant Intl Student (NIIS) screen by detailing on the Addnl I-20 Info field.**

**Step 2 - Enter a start and end date to specify the time frame for which this authorization applies.**

**Step 3 - Enter the reason the student can take less than a full course load.**

**Step 4 - Enter the minimum number of credits a student must take to comply with the authorization.**

**Step 5 – Update the ISPT -> NIIS screens.**

# South Dakota Colleague System Procedures

## **Authorizing Part Time SEVIS Students in Batch**

**Responsibility: University**

**Timeframe: Ongoing; Prior to SEVIS reporting**

Follow the steps below to authorize a group of students to drop below a full course of study.

**Step 1 - Access the SEVIS Authorize Part Time (SVAP) screen.**

**Step 2 - Enter Yes in the Update Mode field to create the appropriate documents to be sent to the INS.**

- If you do not want to run the process in update mode, you must enter Yes in the Produce Report field.

**Step 3 - Enter the following information:**

- Start Date
- End Date
- Reason
- Credits

**Step 4 - Enter the following selection criteria to limit the student selected by the SVAP process:**

- Saved List Name of FOREIGN.PERSON.ST IDs
- Academic Levels
- DSOs
- Home Locations

**Step 5 - Finish from the screen to run the process.**

# South Dakota Colleague System Procedures

## **Determining Continuing Students for SEVIS**

**Responsibility: University**

**Timeframe: Ongoing; Prior to SEVIS reporting**

Follow the steps below to determine students who are in compliance with INS regulations.

**Step 1 - Access the SEVIS Continuance Verify (SEVC) screen.**

**Step 2 - Enter Yes in the Update Mode field to create the appropriate documents to be sent to the INS.**

- If you do not want to run the process in update mode, you must enter Yes in the Produce Report field.

**Step 3 - Enter the term for which you want to run the process.**

**Step 4 - Enter the following selection criteria:**

- Saved List Name of FOREIGN.PERSON.ST IDs
- Academic Levels
- DSOs
- Home Locations
- Students

**Step 5 - Run the process by finishing from the screen.**

# South Dakota Colleague System Procedures

## Processing Manual SEVIS Transactions

**Responsibility:** University

**Timeframe:** Ongoing; Prior to SEVIS reporting

Perform the appropriate procedures in this section for each transaction on the SEVM screen with a status of Manual. See “Understanding Manual Transactions” for background information about these procedures.

## Procedure for Initial Review of Manual Transactions

**Step 1 - Access the SEVIS Manual Transactions (SEVM) screen, shown in**

**Step 2 - If desired, limit the transactions to be displayed by entering the name of a designated school official (DSO) or responsible officer (RO) at the DSO/RO LookUp prompt.**

- If you leave the box blank, transactions associated with all DSO/RO’s will be displayed.

**Step 3 - Find a transaction with “Manual” displayed in the Status column.**

**Step 4 - Detail from that transaction to the SEVIS Transaction Detail (SEVD) screen.**

**Step 5 - Detail from the File Name field to the SEVIS Transaction Data Values (SEVV) screen to view the transaction data.**

- You may need to detail on multiple files to view all of the data.

**Step 6 - Review the transaction data to determine whether to send this transaction to the INS.**

**Step 7 - Exit the SEVV and SEVD screens to return to the SEVM screen.**

**Step 8 - Continue with the appropriate procedure below:**

- To send the transaction to the INS as-is, go to “Procedure for Sending the Transaction to DMI”.
- To make data changes before sending, go to “Procedure for Changing Transaction Data Before Sending”.
- To delete the transaction without sending, go to “Procedure for Deleting Transactions”.

## Procedure for Sending the Transaction to DMI

**Step 1 - Select Send in the Action field on the SEVM screen.**

- The transaction will immediately be sent to DMI.
- The status in the Status column will change from Manual to either Success or Failed, depending on whether DMI successfully transforms the transaction into an XML document and places it in the broker queue.



# South Dakota Colleague System Procedures

## **Step 2 - What is the new status in the Status column?**

- Success. You are done with this transaction.
- Failed. Continue with Step 3.

## **Step 3 - Detail to the SEVIS Transaction Detail (SEVD) screen.**

## **Step 4 - Review the Error field to identify the problem.**

- Unable to connect to the Listener The DMI Listener is not running.
  - Start the Listener.
  - Contact the system administrator
- The DMI host name or port is incorrect in the WEBCONFIG record in UT.PARMS for this main remote account.
  - On the Define Account WebConfig (DWEB) screen in UT, check the DMI Listener IP Address field and the DMI Listener Port Number field to confirm that they are correct for this Listener.
  - Contact the system administrator
- Error occurred executing the extension. Please contact the system administrator.
  - The Hypersonic SQL database is not running.
  - Start the database.
  - Contact the system administrator

## **Step 5 - Exit the SEVD screen to return to the SEVM screen.**

## **Step 6 - Fix the problem causing the Failed transaction, and then attempt to send the transaction again.**

## **Procedure for Changing Transaction Data Before Sending**

### **Step 1 - Detail from the SEVM screen to the appropriate Colleague data entry screen(s) to do the following:**

- Change the data.
- If changing the data did not trigger a replacement transaction, make the data change required to trigger a replacement transaction.
- See “Creating Replacement Transactions” for more information.

### **Step 2 - Exit and then re-access the SEVM screen.**

- This step is necessary so that the new (replacement) transaction appears on the screen.

### **Step 3 - Find the new (replacement) transaction.**

- Transactions for the same person appear together.

### **Step 4 - Detail to SEVD and SEVV and review the transaction data to determine whether to send this transaction to the INS.**

### **Step 5 - Exit the SEVV and SEVD screens to return to the SEVM screen.**

# South Dakota Colleague System Procedures

## **Step 6 - Is the new transaction ready to be sent to the INS?**

Yes. Continue with Step 7.

No. Return to Step 1 to make the necessary data changes.

## **Step 7 - Delete the original transaction, and the intermediate transaction (if any), by selecting Delete in the Action field on the SEVM screen.**

**Note: See “Alternative Workflow” on page 3-39 for a discussion of another possible workflow for this procedure.**

## **Step 8 - From the new transaction, select Send in the Action field on the SEVM screen.**

- The transaction will immediately be sent to DMI.
- The status in the Status column will change from Manual to either Success or Failed, depending on whether DMI successfully transforms the transaction into an XML document and places it in the broker queue.

## **Step 9 - What is the new status in the Status column?**

- Success. You are done with this transaction.
- Failed - Continue with Step 3.

## **Step 10 - Detail to the SEVIS Transaction Detail (SEVD) screen.**

### **Step 11 - Review the Error field to identify the problem.**

- Unable to connect to the Listener The DMI Listener is not running.
  - Start the Listener.
- The DMI host name or port is incorrect in the WEBCONFIG record in UT.PARMS for this main remote account.
  - On the Define Account WebConfig (DWEB) screen in UT, check the DMI Listener IP Address field and the DMI Listener Port Number field to confirm that they are correct for this Listener.
- Error occurred executing the extension. Please contact the system administrator.
  - The Hypersonic SQL database is not running.
  - Start the database.

## **Step 12 - Exit the SEVD screen to return to the SEVM screen.**

## **Step 13 - Fix the problem causing the Failed transaction, and then attempt to send the transaction again.**

## **Procedure for Deleting Transactions**

### **Step 1 - Select Delete in the Action field on the SEVM screen.**

- The transaction will be marked for deletion.
- When you save your changes on the SEVM screen, a record will be created in the SEVIS.TRANS.STATUS file with a status of Delete.

# South Dakota Colleague System Procedures

## **Processing Failed SEVIS Transactions**

**Responsibility: University**

**Timeframe: Ongoing; Prior to SEVIS reporting**

Perform this procedure for each transaction on the SEVM screen with a status of Failed. See “Understanding Failed Transactions” for background information about this procedure.

**Step 1 - Access the SEVIS Manual Transactions (SEVM) screen.**

**Step 2 - Find a transaction with “Failed” displayed in the Status column.**

**Step 3 - Detail to the SEVIS Transaction Detail (SEVD) screen.**

**Step 4 - Review the Error field to identify the problem.**

- Unable to connect to the Listener The DMI Listener is not running.
  - Start the Listener.
- The DMI host name or port is incorrect in the WEBCONFIG record in UT.PARMS for this main remote account.
  - On the Define Account WebConfig (DWEB) screen in UT, check the DMI Listener IP Address field and the DMI Listener Port Number field to confirm that they are correct for this Listener.
- Error occurred executing the extension. Please contact the system administrator.
  - The Hypersonic SQL database is not running.
  - Start the database.

**Step 5 - Fix the problem causing the Failed transaction.**

**Step 6 - Exit the SEVD screen to return to the SEVM screen.**

**Step 7 - From the Failed transaction, select Send in the Action field on the SEVM screen.**

- The transaction will immediately be sent to DMI.
- The status in the Status column will either change to Success or remain Failed, depending on whether DMI successfully transforms the transaction into an XML document and places it in the broker queue.

**Step 8 - What is the new status in the Status column?**

- Success. You are done with this transaction.
- Failed. Repeat the process starting with Step 3.

# South Dakota Colleague System Procedures

## Processing SEVIS Error Transactions

**Responsibility:** University

**Timeframe:** Ongoing; Prior to SEVIS reporting

Perform this procedure for each transaction on the SEVM screen with a status of Error. See “Understanding Error Transactions” for background information about this procedure.

**Step 1 - Access the SEVIS Manual Transactions (SEVM) screen.**

**Step 2 - If desired, limit the transactions to be displayed by entering the name of a designated school official (DSO) or responsible officer (RO) at the DSO/RO LookUp prompt.**

- If you leave the box blank, transactions associated with all DSO/RO’s will be displayed.

**Step 3 - Find a transaction with “Error” displayed in the Status column.**

**Step 4 - Detail from that transaction to the SEVIS Transaction Detail (SEVD) screen.**

**Step 5 - Review the Error field to identify the missing data.**

**Step 6 - Exit the SEVD screen to return to the SEVM screen.**

**Step 7 - Detail from the SEVM screen to the appropriate Colleague data entry screen(s) to do the following:**

- Enter the missing data.
  - **SEVIS-CREATE-STUDENT**
    - (Create Student)
    - This document is for initial reporting of a foreign student to the INS.
  - **SEVIS-AUTH-DROP-BELOW-FC**
    - (Authorize to Drop Below Full Credit)
    - Reports students who have been authorized to drop below a full course load.
    - You can create the document by either entering data on ISPT or by running the SVAP process.
  - **SEVIS-COMPLETE-PROGRAM**
    - (Complete Program)
    - Reports students who have graduated from an academic program.
    - This document is created only when a program end date has been entered and the status for the program is graduated.
  - **SEVIS-EXTEND-PROGRAM**
    - (Extend Program)

# South Dakota Colleague System Procedures

- Reports students who require more time to complete their academic program.
- This document is only created when the Form Purpose on the NIIS screen is set to a value with a special processing code of 3.
- **SEVIS-DEFER-ATTENDANCE**
  - (Defer Attendance)
  - Reports students or applicants who decide to defer attendance.
  - This document is created in one of the following ways:
    - Change the start date on SACP
    - Change the start term on APPN or SHAP
    - Manually set Form Purpose on NIIS to a value with a special processing code of 9
- **SEVIS-DISCIPLINARY-ACTION**
  - (Disciplinary Action)
  - Reports students with a criminal offense.
  - This document is created when the Criminal Offender flag on VTEA is set to Yes.
- **SEVIS-TERMINATE-STUDENT**
  - (Terminate Student)
  - Reports students who are terminated for the following reasons:
    - Withdrawal or hiatus
    - Visa type change
    - Deceased
    - Unauthorized to drop below full time
    - Student or applicant does not report to the institution
- **SEVIS-STUDENT-REGISTRATION**
  - (Registration)
  - Reports if the student is expected to attend the institution for the following term or session.
- **SEVIS-EDIT-PERSONAL**
  - (Edit Personal Information)
  - If the student has already been reported to the INS using the SEVIS interface and changes to any personal information occurs (i.e. name, address, etc.), this documents reports those changes to the INS.
- **SEVIS-EDIT-PROGRAM-INFO**
  - (Edit Program Information)
  - Reports if a student changes academic programs or if they add additional majors or minors.
- **SEVIS-EDIT-STUDENT-FINANCIAL**
  - (Edit Financial Information)
  - Reports any changes to a students expense or funding information.
  - This document is created if the academic term on NIIS is changed, expenses on NIIS are changed, or funding information on FPFN is changed.
- **SEVIS-EDIT-DEPENDENT**

# South Dakota Colleague System Procedures

- (Edit Dependent Information)
- If the dependent has already been reported to the INS using the SEVIS interface and changes to any personal information occurs, (i.e. name, address, etc.) this documents reports those changes to the INS.
- **SEVIS-REACTIVATE-DEPENDENT**
  - (Reactivate Dependent)
  - Reports dependents who have been reported as terminated but must reported as active again.
  - The status on SPO or RELE must match a status entered on the SEVA screen in order to create this document.
- **SEVIS-TERMINATE-DEPENDENT**
  - (Terminate Dependent)
  - Reports dependents who are terminated because the foreign student was terminated, the dependent is deceased, or no longer a dependent.
- **SEVIS-ADD-DEPENDENT**
  - (Add Dependent Information)
  - Reports a new spouse or child that has a relation status on RELE that matches a status entered on SEVP.
  - Additional information about dependents is provided below.
- **SEVIS-OFF-CAMPUS-EMPLOY**
  - (Off Campus Employment)
  - Reports off campus employment.
  - This type of employment is recorded on the EMPD screen with a vocation code that is on the SEVIS.EMPLOY.TYPES translation table with a code of 03.
- **SEVIS-NEW-CPT-EMPLOYMENT**
  - (New or Changed Curricular Practical Training [CPT] Employment)
  - Reports new or changed CPT employment.
  - This type of employment is recorded on the EMPD screen with a vocation code that is on the SEVIS.EMPLOY.TYPES translation table with a code of 02.
- **SEVIS-OPT-REQUEST**
  - (New or Changed Optional Practical Training [OPT] Employment)
  - Reports new or changed OPT employment.
  - This type of employment is recorded on the EMPD screen with a vocation code that is on the SEVIS.EMPLOY.TYPES translation table with a code of 01
- **SEVIS-RESUME-FULL-COURSE**
  - (Resume Full Course Load)
  - Reports students who are returning to a full course load.
  - Colleague determines if a student is carrying a full course of credits based on the registration process.

# South Dakota Colleague System Procedures

- If entering the missing data did not trigger a replacement transaction, make the data change required to trigger a replacement transaction.

## **Step 8 - Exit and then re-access the SEVM screen.**

- This step is necessary so that the new (replacement) transaction appears on the screen.

## **Step 9 - Find the new transaction.**

- Transactions for the same person appear together.

## **Step 10 - What is the status in the Status column for the new transaction?**

- Error. Some required data is still missing. Return to Step 4 to identify and enter the missing data.
- Manual. You have successfully supplied the missing data. Continue with Step 11.

## **Step 11 - Delete the Error transaction, and the intermediate transaction (if any), by selecting Delete in the Action field on the SEVM screen.**

## **Step 12 - Process the new Manual transaction as described in “Processing Transactions With a Manual Status”.**

# South Dakota Colleague System Procedures

## Viewing and Printing PDFs for SEVIS

**Responsibility:** University

**Timeframe:** Ongoing; Prior to SEVIS reporting

Follow the steps below to view and/or print a PDF for a foreign person.

**Note:** SD currently does not have the UI Interface. SEVIS forms can be printed from the SEVIS system.

### Procedure for Viewing a PDF

**Step 1 - Access the View SEVIS Forms (SEVF) screen using the UI Interface.**

**Step 2 - Enter the person's name at the LookUp.**

- You cannot add a new person to the database through this screen.

**Step 3 - Detail next to the document that you want to view.**

- The Adobe Acrobat Reader is launched when you detail on a document.

**Step 4 - Close Adobe Acrobat Reader when you have finished viewing the PDF.**

- The SEVF screen is redisplayed.

**Step 5 - Repeat Step 3 through Step 4 for each document you want to view.**

**Step 6 - Finish from the SEVF screen once you have viewed the PDFs for the person.**

### Procedure for Printing PDFs

Follow the steps below to print multiple PDFs for a group of foreign people.

**Step 1 - Access the SEVIS PDF Print (SVPP) screen using the UI Interface.**

**Step 2 - Enter either a Saved List of FOREIGN.PERSON.FORMS IDs or the Colleague IDs of foreign persons for which you want to print PDFs.**

**Step 3 - Enter any of the following selection criteria to limit the PDFs to print:**

- Start Date
- End Date
- DSOs
- ROs
- Document Name

**Step 4 - Finish from the screen to print the PDFs.**

**Note:** On the Change Peripheral Defaults screen, if you enter Hold in the Output Device field, only the Batch Error report will go to the hold



# South Dakota Colleague System Procedures

file. The PDFs will always print.

# South Dakota Colleague System Procedures

## **Retrieving Results from SEVIS**

**Responsibility: University**

**Timeframe: Ongoing; Prior to SEVIS reporting**

**Step 1 - Access the SEVIS Request Results (SEVR) screen.**

**Step 2 - Save from the SEVR screen to start the batch process that retrieves the results from SEVIS and updates Colleague.**

**Step 3 - (Colleague 17.0 only) If desired, specify a schedule on the process submission screen for automatically running SEVR as a phantom process.**

# South Dakota Colleague System Procedures

## Reviewing Results and Resolving Errors in SEVIS

Responsibility: University

Perform this procedure for each transaction on the SVRS screen. See “Understanding Review of Results” for background information about this procedure.

### Step 1 - Access the SEVIS Transaction Results (SVRS) screen.

### Step 2 - If desired, limit the transactions to be displayed by entering the name of a designated school official (DSO) or responsible officer (RO) at the DSO/RO LookUp prompt.

- If you leave the box blank, transactions associated with all DSO/RO’s will be displayed.

### Step 3 - What is the status displayed in the Status field?

- Updated.
  - Select Delete in the Action field on the SEVM screen.
  - You are done with this transaction.
  - The transaction will be marked for deletion.
  - When you save your changes on the SVRS screen, the status of the record in the SEVIS.TRANS.STATUS file will be changed from Updated to Delete.
- Error.
  - Continue with Step 4.

### Step 4 - Review the error message in the Error field.

- If the entire message is not displayed, detail to the UTEL screen.
- See the Appendices to the SEVIS Interface Control Document (ICD) for a description of all SEVIS error messages.

### Step 5 - Based on the error message, detail to the appropriate Colleague data entry screen(s) to do the following:

- Enter the missing data.
  - **SEVIS-CREATE-STUDENT**
    - (Create Student)
    - This document is for initial reporting of a foreign student to the INS.
  - **SEVIS-AUTH-DROP-BELOW-FC**
    - (Authorize to Drop Below Full Credit)
    - Reports students who have been authorized to drop below a full course load.
    - You can create the document by either entering data on ISPT or by running the SVAP process.
  - **SEVIS-COMPLETE-PROGRAM**
    - (Complete Program)
    - Reports students who have graduated from an academic program.

# South Dakota Colleague System Procedures

- This document is created only when a program end date has been entered and the status for the program is graduated.
- **SEVIS-EXTEND-PROGRAM**
  - (Extend Program)
  - Reports students who require more time to complete their academic program.
  - This document is only created when the Form Purpose on the NIIS screen is set to a value with a special processing code of 3.
- **SEVIS-DEFER-ATTENDANCE**
  - (Defer Attendance)
  - Reports students or applicants who decide to defer attendance.
  - This document is created in one of the following ways:
    - Change the start date on SACP
    - Change the start term on APPN or SHAP
    - Manually set Form Purpose on NIIS to a value with a special processing code of 9
- **SEVIS-DISCIPLINARY-ACTION**
  - (Disciplinary Action)
  - Reports students with a criminal offense.
  - This document is created when the Criminal Offender flag on VTEA is set to Yes.
- **SEVIS-TERMINATE-STUDENT**
  - (Terminate Student)
  - Reports students who are terminated for the following reasons:
    - Withdrawal or hiatus
    - Visa type change
    - Deceased
    - Unauthorized to drop below full time
    - Student or applicant does not report to the institution
- **SEVIS-STUDENT-REGISTRATION**
  - (Registration)
  - Reports if the student is expected to attend the institution for the following term or session.
- **SEVIS-EDIT-PERSONAL**
  - (Edit Personal Information)
  - If the student has already been reported to the INS using the SEVIS interface and changes to any personal information occurs (i.e. name, address, etc.), this documents reports those changes to the INS.
- **SEVIS-EDIT-PROGRAM-INFO**
  - (Edit Program Information)
  - Reports if a student changes academic programs or if they add additional majors or minors.
- **SEVIS-EDIT-STUDENT-FINANCIAL**
  - (Edit Financial Information)
  - Reports any changes to a students expense or funding information.

# South Dakota Colleague System Procedures

- This document is created if the academic term on NIIS is changed, expenses on NIIS are changed, or funding information on FPFN is changed.
- **SEVIS-EDIT-DEPENDENT**
  - (Edit Dependent Information)
  - If the dependent has already been reported to the INS using the SEVIS interface and changes to any personal information occurs, (i.e. name, address, etc.) this documents reports those changes to the INS.
- **SEVIS-REACTIVATE-DEPENDENT**
  - (Reactivate Dependent)
  - Reports dependents who have been reported as terminated but must reported as active again.
  - The status on SPO or RELE must match a status entered on the SEVA screen in order to create this document.
- **SEVIS-TERMINATE-DEPENDENT**
  - (Terminate Dependent)
  - Reports dependents who are terminated because the foreign student was terminated, the dependent is deceased, or no longer a dependent.
- **SEVIS-ADD-DEPENDENT**
  - (Add Dependent Information)
  - Reports a new spouse or child that has a relation status on RELE that matches a status entered on SEVP.
  - Additional information about dependents is provided below.
- **SEVIS-OFF-CAMPUS-EMPLOY**
  - (Off Campus Employment)
  - Reports off campus employment.
  - This type of employment is recorded on the EMPD screen with a vocation code that is on the SEVIS.EMPLOY.TYPES translation table with a code of 03.
- **SEVIS-NEW-CPT-EMPLOYMENT**
  - (New or Changed Curricular Practical Training [CPT] Employment)
  - Reports new or changed CPT employment.
  - This type of employment is recorded on the EMPD screen with a vocation code that is on the SEVIS.EMPLOY.TYPES translation table with a code of 02.
- **SEVIS-OPT-REQUEST**
  - (New or Changed Optional Practical Training [OPT] Employment)
  - Reports new or changed OPT employment.
  - This type of employment is recorded on the EMPD screen with a vocation code that is on the SEVIS.EMPLOY.TYPES translation table with a code of 01
- **SEVIS-RESUME-FULL-COURSE**
  - (Resume Full Course Load)

## South Dakota Colleague System Procedures

- Reports students who are returning to a full course load.
- Colleague determines if a student is carrying a full course of credits based on the registration process.
- If entering the missing data did not trigger a replacement transaction, make the data change required to trigger a replacement transaction.

### **Step 6 - Delete the Error transaction by selecting Delete in the Action field on the SVRS screen.**

- The transaction will be marked for deletion.
- When you save your changes on the SVRS screen, the status of the record in the SEVIS.TRANS.STATUS file will be changed from Error to Delete.

### **Step 7 - Save changes from the SVRS screen.**

### **Step 8 - Access the SEVM screen to deal with the new transactions as described in “Processing SEVIS Transactions in the EDX Archive”.**

# South Dakota Colleague System Procedures

## Using the BVTT and CVFI Utilities

Responsibility: RIS

Follow the steps below to convert foreign person information.

**Note:** Datatel strongly recommends that you create a backup copy of the PERSON file prior to using these utilities.

**Step 1 - Access the Build Visa Types Trans Table (BVTT) screen.**

**Step 2 - Enter .Y. to build the visa types translation.**

**Step 3 - Finish from the screen to run the BVTT utility.**

**Step 4 - Access the VISA.TYPES validation code table on the Validation Codes (VAL) screen in CORE.**

- Set up this table to represent the categories of visas that are given to nonresident aliens.

**Step 5 - Access the VISA.TYPES.CONV translation table on the File Translation Table (FLTT) screen in CORE.**

- Each value in the Orig Code fields should have a value in the New Code field.

**Step 6 - Access the Convert Foreign Person Information (CVFI) screen.**

**Step 7 - Enter any visa types or ethnic codes that were used to designate a foreign person.**

**Step 8 - Finish from the screen to run the CVFI utility.**

**Step 9 - Review and correct any errors generated by this utility.**

- ID (X) already on FOREIGN.PERSON; nothing updated
  - A FOREIGN.PERSON record was either created manually or by a previous running of the utility.
  - No change required.

**Note:** Running the utility subsequent times will produce this error for each record that was successfully created during the initial running of CVFI.

- ID (X) had VISA.TYPE (Y) that could not be translated; nothing updated
  - The PERSON record had data in VISA.TYPE, but could not be translated by the VISA.TYPE.CONV translation table.
  - Review the VISA.TYPES.CONV translation table for any missing values, and update the table as necessary.
- WARNING: VISA.TYPE converted for ID (X), but no FOREIGN.PERSON record created.
  - The PERSON record has data in VISA.TYPE which could not be translated, and the ALIEN.FLAG data had a special processing code of 1.

## South Dakota Colleague System Procedures

- Change the ALIEN.FLAG for the person to a different value, or remove the special processing code.
- Could not derive alien status for ID (X); Updated VISA.TYPE. The PERSON record did not have data in ALIEN.FLAG, and did have a VISA.TYPE that translated, but a match of VISA.TYPE or ETHNIC was not found.
- Check the visa types and ethnic codes entered on the CVFI screen for any missing values, and update the information as necessary.

**Step 10 - If you have made any corrections, run the CVFI utility again.**

**Step 11 - Repeat Step 9 through Step 10 until all the appropriate foreign person records have been created.**



# South Dakota Colleague System Procedures

## **Defining SEVP**

Responsibility: DA Group

### **Step 1 – Access the SEVIS Parameters (SEVP) screen**

### **Step 2 – Define the Alt ID Types**

- Enter SVINS, SVPER, SVDSO, SVRO, SVSPN

### **Step 3 – Define the Local/Foreign Address Hierarchy**

- Enter SEVFOR          Sevis Foreign Address  
or
- Enter SEVLOC          Sevis Local Address

### **Step 4 – Define the Visa Types**

- Enter F1 and M1.

### **Step 5 – Define the Default DSO, RO, and Sponsor**

- Leave blank when the State merges to one system,

### **Step 6 - Define the Default Sponsor Agencies**

- Enter AID and USIA.

### **Step 7 – Define the English Proficiency Tests**

- For example, TOEFL is one

**Note:** Test scores will need to be entered for foreign students.

### **Step 8 – Define English Proficiency Rules**

- Naming convention is university or common -> module -> name

### **Step 9 – Define Term Length**

- Our terms are 15 weeks long this asks for months.
- When 4.5 was entered, Colleague rounded it up to 5.
- Enter 4 months.

### **Step 10 – Define ST/End Invalid SSNs**

- If we are going to use this parameter after we merge, campuses will need to agree on a range of numbers to use for this. This is another item for our group to discuss; the field can be left blank now.

### **Step 11 – Update the SEVP screen**

# South Dakota Colleague System Procedures

## **Adding or Reactivating Dependents for Foreign Persons**

**Responsibility: University**

**Timeframe: Ongoing; Prior to SEVIS reporting**

Follow the steps below to add or reactivate a dependent for a foreign person.

**Note:** When you are adding and reporting dependents, there are several things that you need to take into consideration.

### **Adding Dependents**

When two people are married and are both students with separate 1-20 forms, any dependents are terminated if one of the students is terminated. It is important to note, that if one of the dependents is also a student, they will not be terminated at the time the first student is terminated. If the dependent should not be terminated, you will have to reactivate the dependent by changing their relation status on Spouse Information (SPO) or Additional Relation Info (RELE) to a status that is also entered in the Dependent Reactivate Statuses field on the SEVIS Additional Parameters (SEVA) screen. In another scenario, two people who are foreign students, who both have dependents that are related to only the one person, requires a different setup. You must use the “Other” relationship group to relate the two foreign students. For example, Student A and Student B are married, Student A is related to Dependent 1 and Student B is related to Dependent 2. You would relate the dependents to the student in a normal way, but Student A and Student B must have the relation of “Other.” Setting up the relationship in this manner keeps from terminating the dependent of the other person when one of the students is terminated.

### **Reporting Dependents**

When you terminate a foreign student with dependents or they complete their academic program, the transaction for the student must be processed by SEVIS and information received from SEVIS, before transactions to terminate the dependents are created by Colleague. You can manually create transaction to terminate a dependent by changing the Relation Status or by entering a deceased date for the person if you do not want to wait for the information to be processed to terminate the dependent(s).

**Step 1 - Access the Relation Information (REL) screen.**

**Step 2 - Access the information for the dependent.**

- If you are accessing information about a spouse, use the Spouse Information (SPO) screen.
- If you are accessing information about an additional dependent, use the Additional Relation Info (RELE) screen.

**Step 3 - Enter or change any necessary information about the dependent.**

**Step 4 - Enter the relation status for the dependent.**

## South Dakota Colleague System Procedures

- If you are adding the dependent, the relation status must match a status listed in the Dependent Add Statuses field on SEVA.
- If you are reactivating the dependent, the relation status must match a status listed in the Dependent Reactivate Statuses field on SEVA.

**Step 5 - Complete the rest of the screen as necessary.**

**Step 6 - Save the information by finishing from the SPO or RELE screen.**

**Step 7 - Save the information by finishing from the REL screen.**

# South Dakota Colleague System Procedures

## **Recording a Divorce**

**Responsibility: University**

**Timeframe: Ongoing; Prior to SEVIS reporting**

**Note:** This procedure is for relationships that were recorded for SEVIS.

Follow the procedures to record a divorce between two formerly married individuals.

**Note:** Do not change without documentation from one of the individuals.

**Step 1 - Read “Understanding Divorces” at [clients.datatel.com](http://clients.datatel.com).**

**Step 2 - Access the record of one of the individuals for whom you want to record a divorce on the Spouse Information (SPO) screen.**

- When you access one of the married individuals on the SPO screen, information about the individual’s spouse is displayed automatically.
- If the Person Resolution screen is displayed, follow your institution’s policy for using LookUp to find a record and for searching for duplicate records.

**Step 3 - Go to the Marital Status field.**

**Step 4 - Change the marital status from “married” to “divorced.”**

**Step 5 - Save your work.**

**Warning!** Never delete the spouse name on SPO. This will delete the PERSON record regardless of the records associated with the person (registrations, applications, academic history, etc.)

# South Dakota Colleague System Procedures

## **Recording a Spousal Relationship**

**Responsibility: University**

**Timeframe: Ongoing; Prior to SEVIS reporting**

**Note:** This procedure is for relationships that were recorded for SEVIS.

Follow the procedures to record spousal information for an individual.

**Note:** This procedure assumes that both individuals for whom you want to record spousal information already exist in your database. For a procedure for adding a person's record to the database, see "Adding a Person". Be sure to carefully follow your institution's procedures for LookUp and record identification before you add a record for a person to your database.

**Currently, SD will only use this for recording relationships for SEVIS.**

**Step 1 - Read "Understanding Relationships" at [clients.datatel.com](http://clients.datatel.com).**

**Step 2 - Access the individual for whom you want to record spousal information on the Relationship Information (REL) screen.**

- If you need to add a new person record here, detail on the Name field and the Foreign Person Information (FINF) screen is displayed. A PERSON record is created when you populate the information for the spouse on the FINF / SPO screen.
  - See "Adding a Person" for procedures on how to add a person to your database.
- If you plan to record only spousal relationship information for an individual, you can do so by accessing the Spouse Information (SPO) screen for the individual directly.
  - If you access the SPO screen rather than the REL screen as your starting point, skip the next step.
- If the Person Resolution screen is displayed, follow your institution's policy for using LookUp to find a record and for searching for duplicate records.

**Step 3 - Access the SPO screen as a detail screen from the REL screen.**

- The SPO screen is available as a detail screen from the Spouse ID field of the REL screen.

**Step 4 - Access the record for this individual's spouse from the SPO screen.**

- If you need to add a new person record here, detail on the Name field and the Foreign Person Information (FINF) screen is displayed. A PERSON record is created when you populate the information for the spouse on the FINF / SPO screen.
  - See "Adding a Person" for procedures on how to add a person to your database.

# South Dakota Colleague System Procedures

- If the Person Resolution screen is displayed, follow your institution's policy for using LookUp to find a record and for searching for duplicate records.

## **Step 5 - Complete the SPO screen.**

- When you specify both individuals on the SPO screen, the screen automatically marks the marital status as "Married."
- In the Address field, enter "P" if the address of the Spouse is to be the same as the address of the Person you are connecting the Spouse to (the Person whose name is in the Header Block), enter "S" if the address for both the Spouse and Person is to be the Spouse's address and enter "O" for Other if the Spouse address is different from the Person's address.

## **Step 6 - Save your work.**

- If you accessed the SPO screen via the REL screen, remember to save your work from both screens.
- From the REL screen, you can add other relationship information for this individual.

# South Dakota Colleague System Procedures

## **Correcting an Accidentally Recorded Marriage**

**Responsibility: University**

**Timeframe: Ongoing; Prior to SEVIS reporting**

**Note:** This procedure is for relationships that were recorded for SEVIS.

Follow the procedures to correct a marriage that was recorded by mistake.

**Step 1 - Read “Understanding Relationships” at [clients.datatel.com](http://clients.datatel.com).**

**Step 2 - Access the record of one of the individuals for whom you want to correct the accidentally recorded marriage on the Spouse Information (SPO) screen.**

- When you access one of the married individuals on the SPO screen, information about the individual’s spouse is displayed automatically.
- If the Person Resolution screen is displayed, follow your institution’s policy for using LookUp to find a record and for searching for duplicate records.

**Step 3 - Go to the Marital Status field.**

**Step 4 - Change the marital status to CO.**

- CO will remove the relationship from the SPO screen.

**Step 5 - Save your work.**

# South Dakota Colleague System Procedures

## **Recording Other Relationships**

**Responsibility: University**

**Timeframe: Ongoing; Prior to SEVIS reporting**

Follow the procedures to record other relationship information for an individual, such as parents or children.

**Note:** This procedure assumes that all individuals for whom you want to record relationship information already exist in your database. For a procedure for adding a person's record to the database, see "Adding and Updating a Person's Information". Be sure to carefully follow your institution's procedures for LookUp and record identification before you add a record for a person to your database.

**Currently, SD will only use this for recording relationships for SEVIS.**

**Step 1 - Read "Understanding Relationships" at [clients.datatel.com](http://clients.datatel.com).**

**Step 2 - Access the individual for whom you want to record relationship information on the Relationship Information (REL) screen.**

- If you need to add a new person record here, detail on the Name field and the Foreign Person Information (FINF) screen is displayed. A PERSON record is created when you populate the information for the spouse on the FINF / SPO screen.
  - See "Adding a Person" for procedures on how to add a person to your database.
- If the Person Resolution screen is displayed, follow your institution's policy for using LookUp to find a record and for searching for duplicate records.

**Step 3 - Complete the REL screen for all relationships that you want to record.**

- If you need to add a new person record here, the Name and Address Entry screen is displayed.
  - See "Adding a Person" for procedures on how to add a person to your database.
- To enter additional relationship information for any relationship, you can access the Additional Relationship Information (RELE) screen.
- You can list the IDs of any children, parents, or other relatives or friends of this individual.

**Step 4 - Save your work.**



# South Dakota Colleague System Procedures

## **ADDRESSES**

## Updating a Student's E-mail Address and Type

Responsibility: Home/Central (after Home Location Updater)

Timeframe: After HOME Location update; prior to enrollment reporting

**Note:** Once a person record is Moved to Student, the home university should copy their university specific e-mail address and type to the (PRI) primary e-mail address and type. See notes below regarding saved lists. There will need to be an edit to validate that the e-mail address at the time of the prospect application (recording of the program) has that university specific e-mail address type.

## Importing E-mail Addresses from a HOLD file

Use the Import E-mail Address process to import e-mail addresses from an entity (record) in the `_HOLD_` file formatted as comma delimited (address,type). This process stores the imported e-mail address in each of the user-specified e-mail address types. An output report is produced displaying the name, Id, SSN, and imported e-mail address, if it is successfully imported. If the e-mail address is not imported, it will be included on the batch error report.

This report will be sorted in alphabetical order by name. This sort cannot be changed.

### Step 1 – Access the Import E-Mail Addresses (XIEA) screen

- Colleague will display the XIEA screen with the prompt in the HOLD File Lookup.

### Step 2 – Enter or LookUp the entity (record) you want to process at the HOLD File LookUp prompt.

- The ftp file should not be transferred as binary.

### Step 3 – In the E-mail Address Types to Update field, enter the e-mail address type(s) in which you want to store the imported e-mail address.

### Step 4 – Update the XIEA screen

### Step 5 – Review the generated report

## Copying and Deleting E-mail Addresses

Use the Copy/Delete E-mail Addr screen to copy e-mail addresses from one e-mail address type to another or to delete a single e-mail address/e-mail address type. An output report will be produced indicating the person for whom e-mail addresses were updated (the previous and updated e-mail addresses and types will also be included on the report). This process can either be ran in update mode, whereby the e-mail addresses are actually updated and the report is generated, or in non-update mode, whereby the e-mail addresses are not updated, but the report is produced, displaying what would have changed had the report been ran in updated mode.

# South Dakota Colleague System Procedures

This report will be sorted alphabetically by name. You can modify this sort order after finishing/updating from the screen.

## **Step 1 – For the update after the Home Location Updater, run the paragraph XH.CMR.UPDATE.EMAIL.SAVELIST**

- Enter the Reporting Term
- The paragraph creates a saved list for each university based on STU.CURRENT.HOME.LOCATION
  - The naming convention is XH.EMAIL.UPDATE.xxx where xxx is the university

## **Step 2 – Access the Copy/Delete E-mail Addr (XCDE) screen**

- Colleague will display the XCDE screen with the prompt at the Report Mode field

## **Step 3 – Enter the Report Mode**

U – Update the e-mail address/e-mail address type now and print the output report.

N – Only print the output report indicating what would have changed had the report been ran in updated mode

## **Step 4 – Enter the individual person ID or a saved list of IDs**

- Enter or LookUp the individual person IDs at the Student LookUp prompt from whom you want to update e-mail
- Enter or LookUp the name of a saved list of person IDs for whom you want to update e-mail addresses in the Input Saved List Name field

**Note:** The saved list should contain person IDs of the person records that were Moved to Student AND a student home location of your university. This will prevent overwriting a (PRI) primary e-mail address that already exists. At a scheduled time, all students with a specific university home location will need to be run in update mode. This will likely be a mid-August, early September update.

## **Step 5 - Do you want to copy or delete e-mail addresses?**

**Copy** – Continue with Step 6

**Delete** – Skip to Step 8

**Note:** Students that have not graduated and do not re-enroll for classes will be retained on the email system for a minimum of one semester. Those who were not enrolled in the previous semester will be retained in the e-mail system until after census date. Those who are no longer eligible to enroll will be purged from the email system. New email accounts will be assigned to students upon re-enrollment to the university.

# South Dakota Colleague System Procedures

**Step 6 - In the Copy From E-mail Addr Type field, enter the e-mail address type from which you want to copy the associated e-mail address.**

- For the Central job after the Home Location Updater, enter xE

**Step 7 - In the Copy To E-mail Addr Type field, enter the e-mail address type(s) to which you want to copy the e-mail address associated to the e-mail address type in the Copy From E-mail Addr Type field.**

- For the Central job after the Home Location Updater, enter PRI

Skip to Step 9.

**Step 8 - In the Delete E-mail Address Type field, enter the e-mail address type you want to delete, including the associated e-mail address.**

**Step 9 - Do you want to further narrow the list of selected records for whom you want to update e-mail addresses?**

**Yes** – Enter “Y” in the Addl Selection Criteria field.

**No** – Enter “N” in the Addl Selection Criteria field.

**Step 10 - Update the XCDE screen.**

**Step 11 – Review the generated report**

**Step 12 – Complete the following queries to determine if there is a stranded university email out there without a valid Home Loc**

- If the current Home Location is not NSU, there should not be a northern.edu address in WEB or PRI after the Home Location Updater and the Email updater is run or the new university has updated Home location and email addresses.
- The queries below are primarily for cleaning up invalid addresses that have been allowed to stay in WEB and PRI when the NE address was removed. In the future, when an NE address is removed because the person no longer has the ...northern.edu address, the Web and PRI northern.edu address will also be removed at the same time.

The check for WEB and PRI addresses to be deleted is ...

```
SELECT PERSON                                \  
WITH XD.PERS.PRI.EMAIL.ADDRESS LIKE '...northern.edu'  \  
WITH XN.PERS.NE.EMAIL UNLIKE '...northern.edu'
```

```
SELECT PERSON                                \  
WITH XM.PERS.WEB.EMAIL LIKE '...northern.edu'          \  
WITH XN.PERS.NE.EMAIL UNLIKE '...northern.edu'
```

The file is compared with the file of valid northern.edu addresses. Any records in the saved list with valid northern.edu addresses will be removed from the saved list of records to delete and will be added to the NE email address in Colleague.

# South Dakota Colleague System Procedures

After the records have been checked, another query will be run by the universities immediately before running the XCDE process which gets the saved list and checks that the email address to be deleted is still a northern.edu address

```
SELECT PERSON
WITH XD.PERS.PRI.EMAIL.ADDRESS LIKE '...northern.edu'
```

Or

```
SELECT PERSON
WITH XM.PERS.WEB.EMAIL LIKE '...northern.edu'
```

- The process to find NE records to delete is much more complicated. In the future, when the person who maintains the email addresses reviews the downloaded file and removes the records with valid northern.edu addresses from the saved list, that saved list will also be used to check if the WEB and PRI address for those people is a northern.edu address and will create saved lists for XCDE of only those people whose WEB and PRI addresses are also northern.edu.

The process to find NE records to download to compare with NSU email addresses includes:

Create saved list of NE northern.edu addresses

remove

- current NSU students or pre-registered for future terms (NSU section or NSU home location)
- accepted applicants for future terms
- NSU students from the previous term
- any students who still have a I or IP grade if the student has a NSU current home location or it is NSU section
- affiliates for 3n
- NSU faculty
- Person with a NSU Colleague login
- Other NSU employees

There will still be valid NSU email addresses in that saved list that need to be retained for special cases which will be removed after comparison with the current valid NSU email addresses.

## Manually changing an E-mail Address Type

**Step 1 – Access the Name and Address Entry (NAE) screen for the student**

**Step 2 – In the E-mail Adr field, change the type to PRI for the Home university e-mail address**

- Delete invalid e-mail addresses

**Step 3 – Update the NAE screen**

# South Dakota Colleague System Procedures

## Updating the Preferred Address

Responsibility: University/ESC

Follow the steps to update a person's preferred address.

**Note:** This procedure assumes that the person, organization, or institution whose information you want to update or change already has an existing record on the database. Be sure to carefully follow search procedures for LookUp and record identification before you add a record to the database.

**Step 1 - Review "Understanding Address Processing" at [clients.datatel.com](http://clients.datatel.com) (log in to the Client's section, choose Documentation, Colleague Release 18, Core Documentation, Using Demographics.)**

**Step 2 - Access the address record on the appropriate screen.**

- Access addresses for individuals on the Address Summary(ADSU) screen and detail to Addresses (ADR) screen.
- Access addresses for institutions or organizations on the Organization Profiles (ORGP) screen.
- You can access the Address Summary (ADSU), Addresses (ADR) and Organization Profiles (ORGP) screens from the menu.
- If the Person Resolution screen, Organization Resolution screen, or Address Resolution screen is displayed, follow search procedures for using LookUp to find a record and for searching for duplicate records.

**Step 3 - Go to the Mail Pref field.**

**Step 4 - Mark this address as the preferred address.**

*Note: DO NOT CHANGE the mailing preference and preferred residence without investigating further with other offices/universities , this can be indicated in running reports. Otherwise it may change items in CORE, for other offices.*

- Enter **Y** at the Mail Pref field to mark this address as the preferred address.
  - Your entry indicates that this address is the preferred address for all correspondence.
  - Be aware that if another address was previously indicated as the preferred address, that address record is changed to indicate that it is no longer the preferred address.
- To determine the preferred residence for an individual, access the record for this individual on the Name and Address Entry (NAE) screen.
  - The NAE screen always displays the preferred residence in the address fields.

**Note:** A deceased status will end the preferred address.

**Step 5 – Update the record.**

# South Dakota Colleague System Procedures

## **Converting a Single Organization's Record to a Person Record**

Responsibility: DA Group

Follow the procedures to convert a single organization's record to an individual record.

**Step 1 - Read "Understanding Organization to Person Conversion" at [clients.datatel.com](http://clients.datatel.com).**

**Step 2 - Access the organization's record on the NAE screen.**

- When you access an organization's record on the NAE screen, a warning message is displayed indicating that the record will be converted to an individual record if you save the record from this screen.
- If the Person or Address Resolution screens are displayed, follow your institution's policy for using LookUp to find a record and for searching for duplicate records.

**Step 3 - Save the record.**

- When you save the record, the system converts it to an individual's record.

# South Dakota Colleague System Procedures

## **Converting Multiple Organization Records to Individual Records**

Responsibility: DA Group

Follow the procedures to convert multiple organization records to individual records.

**Step 1 - Read “Understanding Organization to Person Conversion” at [clients.datatel.com](http://clients.datatel.com).**

**Step 2 - Create a saved list of the organization record IDs that you want to convert.**

**Step 3 - Access the CCPE screen.**

**Step 4 - Enter the name of the saved list you created.**

**Step 5 - Save your changes to start the process.**

- You can run this process in phantom mode by selecting this option from the secondary screen displayed.
- When the process is complete, you are returned to the menu from which you accessed the CCPE screen.



# South Dakota Colleague System Procedures

Revised 2/16/07
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## **Adding/Changing a Person Address Record**

**Responsibility: University/ESC**

**Timeframe: Ongoing; Prior to billing**

**Note:** You will get a screen of existing addresses on ADSU. If you are adding a new address, examine the addresses on ADSU to see if an address of the type you plan to enter is already there. No student should have more than one current address of each type. No student should have more than one same address with different types.

Example: if a student has a HOM address, you will do an address change by ending the old address and entering a new address. This will keep the old address in history.

### **Step 1- Access the Address Summary (ADSU) screen**

### **Step 2 – At the person look up prompt, enter the SSN or partial name of the person record you will be making changes to**

- Choose that person from the resolution screen
- The ADSU screen is displayed
- Detail on the address line that you want to change or a blank line to add a new address
- For new, addresses, a Menu Choice window appears with Person Addresses (ADR) and Employment Information (EMPL). Select Person Addresses (ADR)
- The Person Addresses (ADR) screen is displayed

### **Step 3 – If entering a new address and address type**

- Detail on a blank line and choose Person Addresses (ADR)

**Note:** Former addresses are to be retained.

- When entering the permanent home (HOM) address
  - When entering an address on the NAE screen, the address type defaults to HOM. When entering an address on ADR, the address type does not default to HOM but should be added as HOM for a prospect.
  - Do not use punctuation when entering the address.
  - Use no more than 2 lines for the address.
    - If the address has a PO Box and a street address, enter the PO Box only on the 1<sup>st</sup> line. The street address is entered as a FAM address type – see Step 6.
  - **Enter the zip code (excluding foreign zips except for Canada & Mexico)**
    - Enter the Zip code in the City element and city and state will automatically be filled. Check the city/state/zip information that's returned for validity.
    - If no information is returned for zip code, enter city name in City, the State code and the Zip code. Verify correct spelling of city name when adding.
  - Detailing allows for storing multiple addresses. (See Adding/Changing and Address in Core).

# South Dakota Colleague System Procedures

- The system will default the address type to HOM and set the preferred mailing and address flags to ‘Yes’.
- When entering an address other than the permanent home (HOM);
  - Detail on the address field. If ADSU displays, detail on a new line to ADR.
  - On ADR, enter the address information using the following address types as appropriate: Current Mailing Address use (LOC), Next of Kin address (FAM), Foreign (FOR).
    - See Associating Address Type Codes to Addresses procedure in CORE for a definition and usage of address types
  - See Adding/Changing and Address in Core.
- If the Next of Kin address is different from the Permanent Address, enter the Next of Kin address and indicate (FAM) Family for address type.
- If both the Permanent and the Current Address are the same, list the address only once using (HOM) Permanent Home and indicate “Y” as Preferred.
  - At the time of application, duplicate address will not be entered. But, students have opportunities electronically to update their address. If a student enters the same address twice, it will not be audited for and removed.
- When an address is changed on ADR, a prompt to retain address history and an address change source will display. Retain address history and use the appropriate address change source. For example, if the source of the new address is the application, use Application (APP), use Student (STU) if the source is from the student directly via email or verbal etc. Use correction (COR) only when there is a genuine mistake that needs to be corrected.

Repeat these procedures (**ADSU** through **ADR**) for each type of address.

**To correct an existing address, you can detail on the address to change, type the new address information over the old address.**

**Note:** In the merged environment, there will only be one like address per address type. The merge did not clean up duplicate like addresses with different types. In changing an address, if there are like addresses with multiple types, the HOM address is predominant and should be changed. The other address type addresses can be ended.

## **If changing a current address for the same address type**

- Detail on the address line of the former address with that type
- Select ADR from the resolution screen
- Change the effective date to yesterday
- Change the status to F – Former

# South Dakota Colleague System Procedures

- Update and continue with the steps above to enter a new address

## **If entering a foreign address**

**Note:** Per Postal Regulations, the full address should be typed or legibly written in English and should be placed lengthwise on one side of the item whether it is an envelope or mailing label. An address in a foreign language is permitted if the names of the city, province and country are also indicated in English. The last line of the address block area must include only the complete country name (no abbreviations) written in uppercase letters. Following is the order of information for the destination address:

The following are examples of properly formatted delivery addresses:

MS JOYCE BROWNING	MR JACQUES MOLIERE
2045 ROYAL ROAD	RUE DE CHAMPAIGN
LONDON WIP 6HQ	076570 ST PAUL
ENGLAND	FRANCE

Regarding mail to Canada, the location of the country name and postal code are interchangeable with US Postal formatting; either one may be placed on the last line, with the other placed after the city and provincial name. Following are examples of destination addresses to Canada:

MS HELEN SAUNDERS	MS HELEN SAUNDERS
1010 CLEAR STREET	1010 CLEAR STREET
OTTAWA ON K1A OB1	OTTAWA ON CANADA
CANADA	K1A OB1

Following is the order of entering information for the destination address

### LINE 1: NAME OF ADDRESSEE

- Name of student entered on NAE

### LINE 2: STREET ADDRESS OR POST OFFICE BOX NUMBER

- Enter on the Address field line 1 on ADR
- Do not enter the street address and box number on the same line.
  - SEVIS requires a physical address, not a box number

### LINE 3: CITY OR TOWN NAME, OTHER PRINCIPAL SUBDIVISION (i.e., PROVIDENCE, STATE, COUNTY, etc).

- Enter the city name in City and the state code in State on ADR.
- For countries besides Canada and Mexico, enter the province/state (if any) with the City and leave State blank.

# South Dakota Colleague System Procedures

LINE 4: COUNTRY NAME (UPPERCASE LETTERS IN ENGLISH)

- Enter the country code in the Country field on ADR.
- For foreign addresses, enter the address type as FOR on the ADR screen.

## **Step 4 – If entering a new address and address type, enter the mailing preference and preferred residence**

- Indicate a “Y” if the address you are entering is the Preferred Mailing Address.
- If it is not the Preferred Mailing Address, enter “N”.
- Only one address can be flagged as the Preferred Mailing Address.
  - Most correspondence is sent to the Preferred Mailing Address.

## **If changing a current address for the same address type,**

- *DO NOT CHANGE the mailing preference and preferred residence without investigating further with other offices/universities, this can be indicated in running reports. This could change items in CORE, for other offices.*

## **Step 5 – Enter phone number, extension and type**

- Enter the phone number including area code.
- Do not use any dashes or parenthesis,
- Ex. 6056262544 would be an accurate way to enter the phone number.
- Phone numbers of hearing impaired persons may be stored with \*’s and/or with ‘text’ at the end so as to signify this person cannot receive a phone call placed in the usual manner and alternate means of communication will be needed. The phone number can be entered as 605\*626\*2544, 605\*626\*2544text or 6056262544text.
- Only use the extension field if an extension is given (rarely).
- Enter the type of phone number. Press F1 twice to list the valid codes.
- Use ‘H’ for Home; ‘L’ for Local; ‘F’ for a foreign; ‘B’ for business;
- International phone numbers can be entered here and do not need to follow US and Canadian formatting of phone numbers.

**Note:** Do not make phone number changes on **ADR**. They should be updated/entered on **NAE**.

## **Step 6 – Enter/edit the Effective Start and End Date(s) for the address if applicable.**

- If this is an address change, enter the end date to retain history of the old address.
  - If you put an end date in, the status would be Former

## **Step 7 – Enter the status of the address**

- The Status(es) of all address(es) entered should be (C) Current.
- The only time this will be different is if you place Beginning and/or Ending Dates on the address(es), or if an address is no longer valid.

## South Dakota Colleague System Procedures

### Step 8 – Enter a source of this address change

APP	Common Application Form	Used when a common application is received
COR	Correction	Used when an individual made a data entry error
FAD	Fin Aid App Demographics	Used when a Fin Aid Ap is received
GEN	General Survey	Used when a General Survey is received
NEW	New Address Form	Used when a new address form is received
OBT	Obituary	Used when an obituary is received
RET	Returned Mail	Used when mail is returned for undeliverable address
VEN	Vendor Application Form	Used when a vendor ap is received
WEB	Web	Used for address changes via the web
STU	Student Provided	Used when a student provides a new address
OTH	Other	

### Step 9 – Update the ADR screen

# South Dakota Colleague System Procedures

Revised 2/16/07
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## Address Cleanup after ELF-based Imports

**Responsibility: University/ESC**

**Timeframe: Ongoing; Prior to billing**

**Note:** Address cleanup should be done immediately after all ELF-based imports that are able to add addresses to Colleague, such as EGAP, ECAP, ACT, (LOC address via WebAdvisor registration entered by student?) etc.

No student should have more than one current address of each type (HOM, LOC, FAM, etc.). No student should have more than one same address with different types.

Example: if a student has a new HOM address, you will do an address change by ending the old HOM address (changing the address status to Former) and entering a the new address, or keeping a new address that loaded via import. This will keep the old address in history, but it will no longer be labeled a “current” address.

### Step 1 - Access the Address Summary (ADSU) screen

#### Step 2 – At the person look up prompt, enter the SSN or partial name of the person record to which you will be making changes

- Choose that person from the resolution screen
- The ADSU screen is displayed
- Review the addresses on ADSU with current status (active addresses)
- Determine if a new address loaded during import.
- If a new address loaded, determine if it is the same address as one that was on the record prior to import, though possibly formatted differently, or if it is really a new address.
- If a new address loaded from the import, detail into the old current address of the same type and change the address status to Former.
- Detail into the newly loaded address (if it is a new address) and format using Runner. This may be done address-by-address or by using a batch process.
- If an address loaded from the import that is not a new address, but is the same as an existing address of the same type (though with possible different formatting), review the phone numbers that loaded during import with the address. If necessary, update the phone numbers on the address that was on the system prior to import. Then delete the newly loaded duplicate address from ADSU, so that only one current address of that type is on ADSU.
- Detail on the address line that you want to change or a blank line to add a new address
- For new addresses, a Menu Choice window appears with Person Addresses (ADR) and Employment Information (EMPL). Select Person Addresses (ADR)
- The Person Addresses (ADR) screen is displayed

#### Step 3 – If entering a new address and address type

- Detail on a blank line and choose Person Addresses (ADR)

# South Dakota Colleague System Procedures

**Note:** Former addresses are to be retained.

- When entering the permanent home (HOM) address
  - When entering an address on the NAE screen, the address type defaults to HOM. When entering an address on ADR, the address type does not default to HOM but should be added as HOM for a prospect.
  - Do not use punctuation when entering the address.
  - Use no more than 2 lines for the address.
    - If the address has a PO Box and a street address, enter the PO Box only on the 1<sup>st</sup> line. The street address is entered as a FAM address type – see Step 6.
  - **Enter the zip code (excluding foreign zips except for Canada & Mexico)**
    - Enter the Zip code in the City element and city and state will automatically be filled. Check the city/state/zip information that's returned for validity.
    - If no information is returned for zip code, enter city name in City, the State code and the Zip code. Verify correct spelling of city name when adding.
  - Detailing allows for storing multiple addresses. (See Adding/Changing and Address in Core).
  - The system will default the address type to HOM and set the preferred mailing and address flags to 'Yes'.
- When entering an address other than the permanent home (HOM);
  - Detail on the address field. If ADSU displays, detail on a new line to ADR.
  - On ADR, enter the address information using the following address types as appropriate: Current Mailing Address use (LOC), Next of Kin address (FAM), Foreign (FOR).
    - See Associating Address Type Codes to Addresses procedure in CORE for a definition and usage of address types
  - See Adding/Changing and Address in Core.
- If the Next of Kin address is different from the Permanent Address, enter the Next of Kin address and indicate (FAM) Family for address type.
- If both the Permanent and the Current Address are the same, list the address only once using (HOM) Permanent Home and indicate "Y" as Preferred.
  - At the time of application, duplicate address will not be entered. But, students have opportunities electronically to update their address. If a student enters the same address twice, it will not be audited for and removed.
- When an address is changed on ADR, a prompt to retain address history and an address change source will display. Retain address history and use the appropriate address change source. For example, if the source of the new address is the application, use Application (APP), use Student (STU) if the source is from

# South Dakota Colleague System Procedures

the student directly via email or verbal etc. Use correction (COR) only when there is a genuine mistake that needs to be corrected.

Repeat these procedures (**ADSU** through **ADR**) for each type of address.

**To correct an existing address, you can detail on the address to change, type the new address information over the old address.**

**Note:** In the merged environment, there will only be one like address per address type. The merge did not clean up duplicate like addresses with different types. In changing an address, if there are like addresses with multiple types, the HOM address is predominant and should be changed. The other address type addresses can be ended.

### **If changing a current address for the same address type**

- Detail on the address line of the former address with that type
- Select ADR from the resolution screen
- Change the effective date to yesterday
- Change the status to F – Former
- Update and continue with the steps above to enter a new address

### **If entering a foreign address**

**Note:** Per Postal Regulations, the full address should be typed or legibly written in English and should be placed lengthwise on one side of the item whether it is an envelope or mailing label. An address in a foreign language is permitted if the names of the city, province and country are also indicated in English. The last line of the address block area must include only the complete country name (no abbreviations) written in uppercase letters. Following is the order of information for the destination address:

The following are examples of properly formatted delivery addresses:

MS JOYCE BROWNING	MR JACQUES MOLIERE
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ENGLAND	FRANCE

Regarding mail to Canada, the location of the country name and postal code are interchangeable with US Postal formatting; either one may be placed on the last line, with the other placed after the city and provincial name. Following are examples of destination addresses to Canada:

MS HELEN SAUNDERS	MS HELEN SAUNDERS
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# South Dakota Colleague System Procedures

1010 CLEAR STREET	1010 CLEAR STREET
OTTAWA ON K1A OB1	OTTAWA ON CANADA
CANADA	K1A OB1

Following is the order of entering information for the destination address

## LINE 1: NAME OF ADDRESSEE

- Name of student entered on NAE

## LINE 2: STREET ADDRESS OR POST OFFICE BOX NUMBER

- Enter on the Address field line 1 on ADR
- Do not enter the street address and box number on the same line.
  - SEVIS requires a physical address, not a box number

## LINE 3: CITY OR TOWN NAME, OTHER PRINCIPAL SUBDIVISION (i.e., PROVIDENCE, STATE, COUNTY, etc).

- Enter the city name in City and the state code in State on ADR.
- For countries besides Canada and Mexico, enter the province/state (if any) with the City and leave State blank.

## LINE 4: COUNTRY NAME (UPPERCASE LETTERS IN ENGLISH)

- Enter the country code in the Country field on ADR.
- For foreign addresses, enter the address type as FOR on the ADR screen.

### **Step 4 – If entering a new address and address type, enter the mailing preference and preferred residence**

- Indicate a “Y” if the address you are entering is the Preferred Mailing Address.
- If it is not the Preferred Mailing Address, enter “N”.
- Only one address can be flagged as the Preferred Mailing Address.
  - Most correspondence is sent to the Preferred Mailing Address.

### **If changing a current address for the same address type,**

- *DO NOT CHANGE the mailing preference and preferred residence without investigating further with other offices/universities, this can be indicated in running reports. This could change items in CORE, for other offices.*

### **Step 5 – Enter phone number, extension and type**

- Enter the phone number including area code.
- Do not use any dashes or parenthesis,
- Ex. 6056262544 would be an accurate way to enter the phone number.
- Phone numbers of hearing impaired persons may be stored with \*’s and/or with ‘text’ at the end so as to signify this person cannot receive a phone call placed in the usual manner and alternate means of communication will be needed. The

# South Dakota Colleague System Procedures

phone number can be entered as 605\*626\*2544, 605\*626\*2544text or 6056262544text

- Only use the extension field if an extension is given (rarely).
- Enter the type of phone number. Press F1 twice to list the valid codes.
- Use ‘H’ for Home; ‘L’ for Local; ‘F’ for a foreign; ‘B’ for business;
- International phone numbers can be entered here and do not need to follow US and Canadian formatting of phone numbers.

**Note:** Do not make phone number changes on **ADR**. They should be updated/entered on NAE.

**Step 6 – Enter/edit the Effective Start and End Date(s) for the address if applicable.**

- If this is an address change, enter the end date to retain history of the old address.
  - If you put an end date in, the status would be Former

**Step 7 – Enter the status of the address**

- The Status(es) of all address(es) entered should be (C) Current.
- The only time this will be different is if you place Beginning and/or Ending Dates on the address(es), or if an address is no longer valid.

**Step 8 – Enter a source of this address change**

APP	Common Application Form	Used when a common application is received
COR	Correction	Used when an individual made a data entry error
FAD	Fin Aid App Demographics	Used when a Fin Aid Ap is received
GEN	General Survey	Used when a General Survey is received
NEW	New Address Form	Used when a new address form is received
OBT	Obituary	Used when an obituary is received
RET	Returned Mail	Used when mail is returned for undeliverable address
VEN	Vendor Application Form	Used when a vendor ap is received
WEB	Web	Used for address changes via the web
STU	Student Provided	Used when a student provides a new address
OTH	Other	

**Step X – Update the ADSU screen.**

# South Dakota Colleague System Procedures

## Updating the Seasonal Address

Responsibility: University

This procedure can be used for students that attend a different university in the summer. For example, a student with a home location of DSU but the student is going home to their parent's house in Spearfish (BHSU) for the summer and is taking classes there. This is used mostly for communications management letters.

**Note:** Once the Seasonal address is no longer current, change the status to Former. There is no year associated with the dates.

### **Step 1 – Create/edit an address hierarchy for the seasonal address dates**

- Use LTP in the hierarchy
- CC uses this address first before HOM

### **Step 2 – Access the Address Summary (ADSU) screen for the individual**

### **Step 3 – Enter the Seasonal Address in the first available blank line**

### **Step 4 – Enter the Address Type of LTP**

### **Step 5 – Enter “C” for current status**

### **Step 6 – Enter the Seasonal Date range for this address**

- If this is a one time seasonal address, the start/end dates could also be populated. These dates do contain a year and would be valid for that timeframe only.

### **Step 7 – Update the ADSU screen**

# South Dakota Colleague System Procedures

## Associating Address Type Codes to Addresses

Responsibility: DA Group

Revised 7/6/06
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Complete the following steps to associate address type codes to address records.

**Step 1 - Create the address type codes that you want to use.**

**Step 2 - Access the appropriate screen for each ADDRESS record that you want to mark as a specific address type.**

- For individual’s addresses, use the Addresses (ADR) screen.
- For corporate addresses, use the Organization Profiles (ORGP) screen.
- If you want to add a new address, see “Procedure for Adding an Address Record”.
  - When you add the new address, you can mark it with an address type as described below.

**Step 3 - Go to the Address Type field.**

**Step 4 - Enter the address type code that you want to use for this address.**

HOM	Permanent Home	HOM	1	RMA	All students will have a home address unless the student refuses to provide any address information.
BUS	Business	BUS	2	RMA	Used when creating an institution or an organization
WEB	Web	WEB	3	RMA	Used by the web address update capability functionality. Usage will be reviewed.
COR	Correction	COR	7	RMA	Used in the case of incorrect address on an individual or organization. Use specifically for deleting addresses when the individual is deceased. Use correction only if you never want to be able to trace it. Correction Type deletes an address for a person. Not used for a change in address. In the case of deceased students, the last known home address would be entered on STRK with a type of “Ad” for administrative and a code of xLKA to indicate last known address.
ISR	ISIR Load	ISR		RMA	Updated with the ISIR load.
LOC	Local	LOC		RMA	Use if a local address is provided that is different than the home address. LOC or DRM is needed for all International students. International students will also have an FOR address as well.
LTP	Local Temporary	LTP		RMA	A temporary address to be used as a local address when a student attends a university other than the home institution. Use for an address that is for a limited period of time.

## South Dakota Colleague System Procedures

INS	Institution On Campus	INS		RMA	Used to record an institutional address other than the dorm. Also used for faculty members. Used to record box number if different than a dorm room.
RCV	Accounts Receivable	RCV		RMA	Enter accounts receivable address if the student designates a billing address that is different from their home address.
REF	Student Refunds	REF		RMA	Enter a Student Refund address to be used in mailing a refund check; the address will be entered with start/end dates of the term Optional: If the student provides a name and address for the emergency contact, enter the address for the emergency contact person if other than the student's home address. Associated with EMER screen.
EME	Emergency	EME		RMA	
OTH	Other	OTH		RMA	Delivered from Datatel but not used by SD.
SEA	Seasonal	SEA		RMA	Every year the student will be residing at a certain location other than their home for a limited amount of time. There is a set beginning and end date that will occur each year.
DRM	Residence Hall	DRM		RMA	Contains the room number at the residence hall. This will be added by the system when the residence hall assignment is made.
CFD	Corporation/Foundation	CFD		RMA	Not currently used in SD.
FAM	Family	FAM		RMA	Entered as Next of Kin address. Associated with Formatted Name screen.
DIP	Diploma	DIP		RMA	Used for graduation record delivery if the address is different from the home address.
FOR	Foreign	FOR		RMA	Required for SEVIS. Used for a foreign address for all international students.

### Step 5 - Update the record.

# South Dakota Colleague System Procedures

## Deleting an Address

Responsibility: University/ESC

Follow the steps below to delete an address.

**Note:** Used in the case of incorrect address on an individual or organization. Use specifically for deleting addresses when the individual is deceased, not for a change in address. Use correction only if you never want to be able to trace it. Correction Type deletes an address for a person.

**Step 1 - Review “Understanding Address Processing” at [clients.datatel.com](http://clients.datatel.com).**

**Step 2 - Access the address record on the appropriate screen.**

- Access addresses for individuals on the Address Summary (ADSU) screen detailing to the Addresses (ADR) screen
- Access addresses for institutions or organizations on the Organization Profiles (ORGP) screen.
- You can access the Address Summary (ADSU), Person Addresses (ADR) an Organization Profiles (ORGP) screens from the menu.
- If the Person Resolution screen, Organization Resolution screen, or Address Resolution screen is displayed, follow search procedures for using LookUp to find a record and for searching for duplicate records.

**Step 3 – At the person lookup prompt, enter the SSN of the person.**

- If there is a person with that SSN, a resolution screen will appear.
- If there is not a person with that SSN, enter the partial name of the student to further clarify your search.
- If the last name brings up a resolution screen, check the birthdate and/or SSN to make sure it is the right person.

**Step 4 - Go to the Address Type field.**

**Step 5 - Enter the code for the “correction” address type.**

- Enter COR
- The address type codes and descriptions use special processing codes to tell the software how to perform in specific situations.

**Step 6 - Save the record.**

- When you save the record, the system deletes the address and phone number. It does not delete the e-mail address.

# South Dakota Colleague System Procedures

## **Modifying Datatel-Provided Hierarchies**

Responsibility: University

Complete the following steps to modify the Datatel-provided hierarchies.

**Note:** Datatel-provided hierarchies should not be modified. Any other common hierarchies should not be modified without discussion with the other universities since all universities may be utilizing them.

### **Step 1 - Understand name and address hierarchies.**

- See “Understanding Name and Address Hierarchies” for more information.

### **Step 2 - Access the Datatel-provided hierarchy that you want to modify from the Name and Address Hierarchy (NAHM) screen.**

- See the list of Datatel-provided hierarchy records.

### **Step 3 - Complete the screen.**

- Revise the description, if appropriate
- Revise the hierarchy of codes that you want to use for names and addresses by entering the formatted name type codes and address type codes in the fields indicated.
- Revise any Mail Code, Address or Person Rules
- Revise the Name Hierarchy, if appropriate

### **Step 4 - Save the record.**

# South Dakota Colleague System Procedures

## Creating Custom Hierarchies

Responsibility: University

Complete the following steps to create your own custom hierarchies.

### Step 1 - Understand name and address hierarchies.

- See “Understanding Name and Address Hierarchies” for more information.

### Step 2 - Access the Name and Address Hierarchy (NAHM) screen and create a new record.

- The hierarchy record you create cannot be named the same as a Datatel-provided hierarchy.
- See the list of Datatel-provided hierarchy records.

### Step 3 - Complete the screen.

- Enter a description for this hierarchy
- Enter the hierarchy of codes that you want to use for names and addresses by entering the formatted name type codes and address type codes in the fields indicated.
- No special processing attached to seasonal addresses but a person can have more than one current address and seasonal addresses can be used hierarchies.
  - The seasonal address type will need to be in the first position of all NAHM types (along with your other address types) that you want to use in seasonal type correspondence.
  - Use seasonal to track if the student is at more than one institution at a time
- Setup a hierarchy for Parent Name and set it up to look at the new name type created by 3 FORMATTED.NAME.TYPES (MO-Mother, FA-Father, PA-Parents). See Associating Name Type Codes to Names for more information.
  - On FNM screen, setup an entry called “PA” (for example) and then add the name of the parent to this type for the student.
- Incorporate rules that would check the deceased indicator directly so you wouldn’t need to code “deceased” in the mail rules.
  - Assign this Person Rule on all hierarchies.
- Smart code hierarchies
  - Naming convention is university or common -> module -> name.
  - Some common, some university specific
  - Will help with the campus box functionality
- 1098T addresses – might be able to fix the blank line issue by putting an I-Desc. In for the address lines on ADTM (detail from NAHM).

### Step 4 - Save the record.



# South Dakota Colleague System Procedures

## **ORGANIZATIONS**

# South Dakota Colleague System Procedures

## Adding an Organization

Responsibility: DA Group

Use the Organization Profiles (ORGP) screen to add organization name and address information for an organization. This will add an organization to the CORP file, not the CAMPUS.ORGs file.

**Note:** Be sure to carefully follow search procedures for LookUp and record identification before you add a record to the database.

### Step 1 – Access the Organization Profiles (ORGP) screen

### Step 2 – At the organization look up prompt, enter the organization's name

- If the name has potential abbreviations in it, try the look up multiple times to determine if the record is already created
- If the record is not created, enter (A) to add

### Step 3 – Enter the Source

- Most will be OR for Organization
- Press F1 twice for the table

### Step 4 – Enter the EIN or tax ID, if applicable

### Step 5 – Detail on Addnl Info to the Additional Organization Info (AORG) screen to define the following:

Organization Type	FICE and/or GST Number
Organization Status	E-Mail addresses (type is PRI)
SIC Code	Alternate IDs
Industry Class	Formatted Names

### Step 6 – Detail on Principal Contact to the Organization Contact Detail (ORCD) screen to define the following:

- Title of contact
- Address of contact, if different

**Note:** Detailing on Contacts to the Organization Contact (ORGC) screen allows you to enter contacts for this organization.

### Step 7 – Update the ORCD

### Step 8 – Update the AORG

### Step 9 – Enter the address of the organization

- Enter the zip code in city field of CSZ; validate defaults when returned

### Step 10 – Enter the Address Type

# South Dakota Colleague System Procedures

- Most will be BUS for business
- Press F1 twice for the table

**Step 11 – Enter the phone number and type**

**Step 12 – Enter the source of the add**

**Step 13 – Update the ORGP**

# South Dakota Colleague System Procedures

## **Adding/Changing an Organization's Address Record**

**Responsibility: RIS**

### **Step 1 - Access the Organization Profiles (ORGP) screen**

- Type the new address in the address field, enter source and say yes to keep address to history.
- If this is an Address Change, type the new address over the old address and indicate the Address Change Source in the lower right-hand corner of ORGP.
  - See the Data Dictionary data element ADDRESS.CHANGE.SOURCES for a definition and usage of address change sources
- Verify phone number and make changes if necessary.

### **Step 2 - If the record for which you want to add an address does not exist in your database,**

- see “Adding an Organization” for procedures on adding an organization to your database,  
or
- see “Adding an Institution” for procedures on adding an institution to your database.

**Note:** Be sure to carefully follow search procedures for LookUp and record identification before you add a record to the database.

# South Dakota Colleague System Procedures

## **Changing the Organization's Home Office Address**

Responsibility: RIS

Follow the steps update an organization's home office address.

**Note:** Be sure to carefully follow your institution's procedures for LookUp and record identification before you add a record to your database.

**Step 1 - Review "Understanding Organization Name and Address Entry" at [clients.datatel.com](http://clients.datatel.com).**

**Step 2 - Access the organization's record on the Organization Profiles (ORGP) screen.**

- You can access the Organization Profiles (ORGP) screen from the menu.
- If the Organization Resolution screen or the Address Resolution screen is displayed, follow your institution's policy for using LookUp to find a record and for searching for duplicate records.

**Step 3 - Go to the Home Office field.**

**Step 4 - Mark this address as the home office address.**

- Enter **Y** in the Home Office field to mark this address as the home office address.
- Your entry indicates that this address is the home office address for all correspondence.
- Be aware that if another address was previously indicated as the home office address, that address record is changed to indicate that it is no longer the home office address.

**Step 5 - Save the record.**

# South Dakota Colleague System Procedures

## **Converting a Single Individual's Record to an Organization Record**

Responsibility: DA Group

Follow the procedures to convert a single individual's record to an organization record.

**Step 1 - Read "Understanding Person to Organization Conversion" at [clients.datatel.com](http://clients.datatel.com).**

**Step 2 - Access the individual's record on the ORGP screen.**

- When you access an individual's record on the ORGP screen, a warning message is displayed indicating that the record will be converted to an organization record if you save the record from this screen.
- If the Person or Address Resolution screens are displayed, follow your institution's policy for using LookUp to find a record and for searching for duplicate records.

**Step 3 - Save the record.**

- When you save the record, the system converts it to an organization record.

# South Dakota Colleague System Procedures

## **Converting Multiple Individual Records to Organization Records**

Responsibility: DA Group

Follow the procedures to convert multiple individual records to organization records.

**Step 1 - Read “Understanding Person to Organization Conversion” at [clients.datatel.com](http://clients.datatel.com).**

**Step 2 - Create a saved list of the individual record IDs that you want to convert.**

**Step 3 - Access the PECC screen.**

**Step 4 - Enter the name of the saved list you created.**

**Step 5 - Save your changes to start the process.**

- You can run this process in phantom mode by selecting this option from the secondary screen displayed.
- When the process is complete, you are returned to the menu from which you accessed the PECC screen.

# South Dakota Colleague System Procedures

## **CAMPUS ORGANIZATIONS**



# South Dakota Colleague System Procedures

## Adding a Campus Organization

Responsibility: University

Use the Campus Organizations (COMT) screen to add an organization. A campus organization is stored in the CAMPUS.ORG file, not the CORP file.

You only need to enter the Campus Organization ID at the Organization LookUp prompt and a description to create a record for an organization. Campus Organizations will be smart coded to preserve uniqueness within the universities.

### Step 1 – Access the Campus Organizations (COMT) screen

- The campus organizations should only need to be updated when changes to the organization occur after the initial setup.
- Maintenance of campus organizations will also be done from the COMT screen.
- If the organization already exists, enter the organization ID at the Organizations LookUp Prompt.
  - To display a list of all organizations, type the university identifier and ‘...’ on the Campus Org LookUp prompt.
- If the desired organization does not exist, type in an ID that is five characters or less on the Campus Org LookUp prompt with the first character being the university identifier.
  - The prompt “Record not found -- Enter (A)dd or RETURN to Reenter:” will display. Enter “A” at the prompt to add the organization.
  - To reenter the organization ID press enter at the prompt.

### Step 2 - The Campus organization ID will populate at the top of the screen.

- Enter information into the fields on the screen as follows:
  - Description: Enter the full name of the organizations.
  - Type: Enter the type of organization. Enter ATH for all athletic orgs.  
Enter UCOM for all organizations to be pulled into Starfish.
  - Purpose: Leave blank.
  - Default Role: Enter **MEM** for Member.
  - Organization ID: Leave blank.
  - Locations: Enter location of organization (i.e. USD).
  - Year Approved: Enter the year the organization was approved.
  - Recharter Date: Record the charter update date each year.
  - Max Members: Enter the maximum number of members. Leave blank if no maximum.
  - Members/Advisors: An “X” will display when members or advisors exist.
  - Characteristics: Select the characteristics which best fit the organization.
  - Functions: Select the functions which best fit the organization
  - Sponsors: Leave blank.
  - Grouping: Enter the status of the organization.
  - Comments: Leave blank.

# South Dakota Colleague System Procedures

## Step 3 – Update the COMT screen

# South Dakota Colleague System Procedures

## **Adding or Ending an Individual Membership**

Responsibility: University

Use the Campus Org Membership Detail (COMD) screen to add an individual membership to an organization.

**Step 1 – Access or Org Membership Detail (COMD) screen**

**Step 2 - Enter the ID of the organization at the Organization LookUp Prompt.**

**Step 3 - Enter the new member's name or Colleague ID at the Member LookUp prompt.**

**Step 4 – Enter the Start Date**

- Enter the date the person began their association with this organization.
- When a member is added to an organization, the default role will automatically display in the member's list of roles. This role can be changed or deleted if necessary. If the membership is ending, enter an end date

**Step 5 – Enter a Status in the Membership Periods field and in the Roles field**

**Step 6 – Update the COMD screen**

## **Ending a Membership**

**Step 1 – Access or Org Membership Detail (COMD) screen**

**Step 2 - Enter the ID of the organization at the Organization LookUp Prompt.**

**Step 3 - Enter the member's name or Colleague ID at the Member LookUp prompt.**

**Step 4 – Enter the End Date in the Membership Periods field and the Roles field**

- Enter the date the person ended their association with this organization.

**Step 5 – Enter a Status in the Membership Periods field and the Roles field**

**Step 6 – Update the COMD screen**

# South Dakota Colleague System Procedures

## Processing Auto Membership Assignment

Responsibility: University

Use the Auto Assign Membership (AASM) screen to assign membership to a group.

### Step 1 – Access the Auto Assign Membership (AASM) screen

- This process would most likely be used on an initial load of members to an organization.

### Step 2 – Define the following fields

- Campus Org: Enter the organization smart coded ID.
- Role: Enter the default role for these individuals.
- Start Date & End Date: Enter the start and end date for these memberships (if applicable).
- Saved List Name: Enter a saved list name if the member's IDs are contained within a saved list.
- Include IDs: Enter the IDs of the individuals who are to be added as members.
- Academic Levels: Leave blank.
- Min Acad Level GPA: Leave blank.
- Min Acad Level Cum GPA: Leave blank.
- Additional Selection Criteria: No.

### Step 3 – Update the AASM

**Note:** Any changes to these individual records will need to be done on the CORM screen individually. The date entered as the start date will populate in as the start date of the membership and the start date of the default role assigned. Additional roles (i.e. President, Secretary, etc.) will need to be added on an individual basis using CORM and COMD.

# South Dakota Colleague System Procedures

## **Assigning or Ending an Advisor/Director/Coach/Tutor etc. to a Campus Organization**

Responsibility: University

Use the Campus Org Advisor Assignment (COAA) screen to assign an advisor to an organization. Do not start with CORM when assigning individuals to an organization.

**Step 1 – Access the Campus Org Advisor Assignment (COAA) screen**

**Step 2 – At the Person LookUp prompt, enter the person's name or ID**

**Step 3 - Enter the person's start date**

**Step 4 – Enter the person's role information**

**Step 5 – Update the COAA screen**

## **Ending an Advisor/Director/Coach/Tutor etc. Assignment**

**Step 1 – Access the Campus Org Advisor Assignment (COAA) screen**

**Step 2 – At the Person LookUp prompt, enter the advisor's name or ID**

**Step 3 - Enter the person's end date**

**Step 4 – Update the COAA screen**

# South Dakota Colleague System Procedures

## Printing Advisor Labels for Campus Organizations

Responsibility: University

Use the COAL screen to generate campus organization advisor labels.

### Step 1 – Access the Campus Org Advisor Labels (COAL) screen

### Step 2 – Define the following fields

- Form Name: CMP.ORG.ADV.LABEL will automatically populate in the space.
- Print or Hold Output: **H-Hold**.
- Postal Sort Class: Leave blank.
- Activity to Update: Leave blank.
- Update Mailing History: **No**.
- Name/Address Selection: Detail (F2) to select **PREFERRED** or **HOME**
- Saved List Name: Leave blank.
- Zip Code: Leave blank.
- Active Date: Leave blank.
- Campus Orgs: Enter IDs of organizations for which advisor labels are needed. Leave this field blank to print labels for all organizations.
- Roles: Leave blank.
- Zip Codes: Leave blank.
- Additional Selection Criteria: **No**.

### Step 3 – Update the COAL screen to start the process to create the labels.

- Enter H in the Output Device field

### Step 4 - The labels will print to the screen.

- After viewing the labels to ensure correctness, press “S”.
- Then, enter “P” for Printer Spooler and a printer name to send the labels to a printer.

# South Dakota Colleague System Procedures

## Printing an Organization Roster

Responsibility: University

Use the Campus Organization Roster (CORS) screen to view or print a roster of one or more organizations.

### Step 1 – Access the Campus Organization Roster (CORS) screen

### Step 2 – Define the following fields

- Name/Address Hierarchy: Enter **Preferred**.
- From Date: Enter the start date of the period desired.
- To Date: Enter the end date of the period of time desired.
- Print Roles: Enter **Yes** to see the roles of the members.
- Print GPA: Enter **No**.
- Directory Codes Incl: Leave blank.
- Directory Codes Excl: Leave blank.
- Saved List Name: Leave blank.
- Campus Org Types: Enter an organization type to get a roster for all organizations of a certain type.
  - Press F1 twice to display a list of table values.
- Campus Orgs: Enter the ID of all organizations needing rosters. Leave the space blank to get a roster for all organizations.
  - Enter your university identifier and ‘...’ on the command line to display a list of organizations.
- Additional Selection Criteria: **No**.

### Step 3 - The sort screen will be the next screen to display.

- There will be no changes to this screen.

### Step 4 - The printer setup screen will be the next screen to display.

- To send the output to the Hold queue and the screen, enter “**H**” on the field Peripheral Device.
- To send the output to the printer, enter “**P**” in the Output Device field and a printer in the Printer field.

### Step 5 – Update the CORS screen

# South Dakota Colleague System Procedures

## Printing Labels for Campus Organizations

Responsibility: University

Use the COML screen to generate campus organization membership labels.

### Step 1 – Access the Campus Org Membership Labels (COML) screen

### Step 2 – Define the following fields

- Form Name: **CMP.ORG.MEM.LBL** will automatically populate in the space.
- Print or Hold Output: **H – Hold.**
- Postal Sort Class: Leave blank.
- Activity to Update: Leave blank.
- Update Mailing History: **No.**
- Name/Address Selection: Detail (F2) to select **PREFERRED** or **HOME.**
- Save List Name: Enter saved list name of organizations (usually leave blank).
- Zip Code: Leave blank.
- Active Date: Leave blank.
- Campus Orgs: Enter IDs of organizations for which member labels are needed. Leave this field blank to print labels for all organizations.
- Roles: Leave blank.
- Zip Codes: Leave blank.
- Additional Selection Criteria: **No.**

### Step 3 – Update the COML screen

- Enter H as the Output Device

### Step 4 - The labels will print to the screen.

- After viewing the labels to ensure correctness, press “**S**”.
- Then, enter “**P**” for Printer Spooler and a printer name to send them to a printer.



# South Dakota Colleague System Procedures

## **Viewing a Campus Organization's Advisor List**

Responsibility: University

Use the Campus Org Membership (CORM) screen to view a list of a campus organization's advisors.

**Step 1 – Access the Campus Org Membership (CORM)**

**Step 2 - Enter the ID of the organization at the Organization LookUp Prompt.**

**Step 3 - The membership and advisor information will display on the screen.**

# South Dakota Colleague System Procedures

## **Viewing an Advisor's Affiliations to an Organization**

**Responsibility: University**

Use the Campus Org Affiliations (COAF) screen to view an advisor's affiliations to an organization.

**Step 1 - Access the Campus Org Affiliations (COAF) screen to display a list of organizations to which an advisor is associated.**

**Step 2 - At the Person LookUp prompt, enter the Colleague ID or name of the advisor.**

**Step 3 - Organization information pertaining to this individual will display**

- A printout of the organizations can be done at this time by clicking on the print icon from the toolbar.

# South Dakota Colleague System Procedures

## **Viewing an Individual's Affiliations with Campus Organizations**

Responsibility: University

Use the Campus Org Affiliations (COAF) screen to view an individual's affiliations with campus organizations.

**Step 1 - Access the Campus Org Affiliations (COAF) screen to display a list of organizations to which a student is a member.**

**Step 2 - At the Person LookUp prompt, enter the Colleague ID or name of the student desired.**

**Step 3 - Organization information pertaining to this individual will display**

- A printout of the organizations can be done at this time by clicking on the print icon from the toolbar.

# South Dakota Colleague System Procedures

## **Viewing an Organization's Membership List**

Responsibility: University

Use the Campus Org Membership (CORM) screen to view an organization's membership list.

**Step 1 – Access the Campus Org Membership (CORM)**

**Step 2 - Enter the ID of the organization at the Organization LookUp Prompt.**

**Step 3 - The membership and advisor information will display on the screen.**

# South Dakota Colleague System Procedures

## **Adding an Affiliate Organization Record for Campus Alert**

Responsibility: RIS for ORGP; University for DADD

Use the Organization Profiles (ORGP) screen to add a new organization record for an affiliate associated with your university that should be notified via Campus Alert in an emergency.

**Note:** Be sure to carefully follow search procedures for LookUp and record identification before you add a record to the database.

### **Step 1 – Access the Organization Profiles (ORGP) screen**

#### **Step 2 – At the organization look up prompt, enter the organization's name**

- If the name has potential abbreviations in it, try the look up multiple times to determine if the record is already created
- If the record is not created, enter (A) to add

#### **Step 3 – Enter the address of the organization**

- Enter the zip code in city field of CSZ; validate defaults when returned

#### **Step 4 – Enter the Address Type**

- Most will be BUS for business
- Press F1 twice for the table

#### **Step 5 – Enter the phone number and type**

#### **Step 6 – Update the ORGP**

#### **Step 7 – Access the Additional Demographics (DADD) screen**

#### **Step 8 – At the person lookup prompt, enter the SSN or the Colleague Id of the affiliate**

#### **Step 9 – In the Chapters field, enter the smart coded term associated with the affiliate**

- Naming convention is xYYS – where x is the university YY is the year & S is the semester, i.e. – B08F BHSU 2008 Fall
- The affiliates will need to be reviewed on a semester basis since this is the code used to extract them for the Campus Alert import.

#### **Step 10 – Update the DADD screen**

# South Dakota Colleague System Procedures

## **INSTITUTIONS**

# South Dakota Colleague System Procedures

Revised 11/04/05
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## Adding an Institution

Responsibility: ESC

Follow the steps to add an institution to the database.

Use the Institutions (INST) and Organization Profiles (ORGP) screens to add information about an institution. Be sure to carefully follow search procedures for LookUp and record identification before you add a record to the database.

**Note:** The universities will not add institutions. This will be done by ESC. If the end user receives the Record not Found, enter A to Add, cancel from the screen.

### Step 1 - Read “Understanding Institutions” at [clients.datatel.com](http://clients.datatel.com)

### Step 2 - Access the Institutions (INST) screen.

### Step 3 - Create a new institutions record.

- At the Institutions LookUp prompt, enter the name of the new institution.
- Enter **A** at the Record not Found prompt.
- When you add a new institution from the INST screen, the Organization Profiles (ORGP) is automatically displayed.
- If the Institution Resolution screen or the Address Resolution screen is displayed, follow search procedures for using LookUp to find a record and for searching for duplicate records.

**Note:** Name, academic calendar for Q or S, level of school, VT-Vocational, JC-Junior College and CU-College University can be verified at AACRAO [http://www.aacrao.org/users\\_only/TCPForm/](http://www.aacrao.org/users_only/TCPForm/) (required a password) or the online college catalog.

Some universities require multiple entries for academic calendar, level of the university/school and/or name changes for the university/college. When the institution name is officially changed, an additional entry on IASU is required. There should be individual entries for each name with specific dates when each of these names was legal. The FICE or CEEB code would be identical for each institution entry. The only time the name would be changed on the existing entry is to correct spelling, etc. on a previous entry.

College Source Online will give prior catalogs to check name, etc. also.

<http://www.collegesource.org/home.asp>

### Step 4 – Define the following fields on the Organizations Profile (ORGP) screen.

- Enter the Source
  - Most will be OR for Organization
  - Press F1 twice for the table

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- Enter the EIN or tax ID, if applicable
- Detail on Addnl Info to the Additional Organization Info (AORG) screen to define the following:

Organization Type	E-Mail addresses (type is
Organization Status	PRI)
SIC Code	Alternate IDs
Industry Class	Formatted Names
FICE and/or GST Number	
- Detail on Principal Contact to the Organization Contact Detail (ORCD) screen to define the following:
  - Title of contact
  - Address of contact, if different

**Note:** Detailing on Contacts to the Organization Contact (ORGC) screen allows you to enter contacts for this organization.
- Update the ORCD
- Update the AORG
- Enter the address of the organization on ORGP
  - Enter the zip code in city field of CSZ; validate defaults when returned
  - Enter the County
- Enter the Address Type
  - Most will be BUS for business
  - Press F1 twice for the table
- Enter the phone number and type
- Enter the source of the add
- Update the ORGP
- When you update on the ORGP screen, you are returned to the INST
- screen.

## **Step 5 – Define the following information on the Institutions (INST) screen.**

- Enter the Academic Calendar
  - Enter O for institutions that are on a system other than quarter or semester
- Enter the Credits Conversion
- Enter the Institution Type
  - This is a required field.
  - Institution type codes are flagged as either high school or college codes.
- Enter the Accreditation Agency if applicable
- Enter the CEEB or FICE
  - Use the Higher Education Directory which is published every year to identify the institutions and their corresponding FICE codes or check FICE codes at <http://www.fafsa.ed.gov/fotw0405/fslookup.htm>
  - Enter the FICE codes assigned by the Department of Ed
  - If the school is not accredited or international, then assign a South Dakota generic CEEB code which begins with the number 8 or South Dakota



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generic FICE code which begins with the number 9. Codes should never exceed 6 digits.

## **Step 6 – Update the INST screen**

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## **Defining Institutional Definitions**

**Responsibility: DA Group**

### **Step 1 – Access the Institution Hierarchy Default (IDEF) screen.**

- What we set there as defaults will show on DEPT, DIV, and SCHL when accesses from the ST system.
- Not required to put anything there.

### **Step 2 – Define Reg Retake Policy**

- Leave the Reg Retake Policy field blank

### **Step 3 – Define Grade Scheme**

- Leave Grade Scheme blank
- If grade scheme is null on a course then the IDEF grade scheme is referenced.

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## **Closing and Combining High Schools**

Responsibility: ESC

Timeframe: Yearly

Note: A list can be obtained from the SD DOE of the closed/consolidated school districts or a CD can be obtained from ACT.

### **Step 1 - Access the Institutions (INST) screen for the closed or combined high school**

- Enter a unique CEEB for the closed school; closed schools in SD should start with 942xxx.

### **Step 2 – Define the following fields on the Organizations Profile (ORGP) screen.**

- If this high school is being combined
  - Other names
    - Enter the previous name of the high school
  - Address
    - Enter ‘Do Not Mail’ in line 1 of the address
    - Enter ‘School Closed’ in line 2 of the address
- If this high school is being closed
  - Address
    - Enter ‘Do Not Mail’ in line 1 of the address
    - Enter ‘School Closed’ in line 2 of the address

### **Step 3 – Detail on the Organization Info field to the Additional Organization Info (AORG) screen**

- Enter I in the Organization Status field

### **Step 4 – Update the INST screen**

### **Step 5 – Update CEEB codes as needed in ECAP/AAI**

### **Step 6 – Notify RIS of CEEB changes so reports can be updated**

# South Dakota Colleague System Procedures

## **EMPLOYMENT INFORMATION**

# South Dakota Colleague System Procedures

## **Adding Employment Information for an Individual**

Responsibility: Home

Follow these steps to add employment outside of the institution information for an individual. (Note: The employer will need to be set up on ORGP prior to attaching that person on EMPL).

### **Step 1 - Review “Understanding Employment” at clients.datatel.com.**

### **Step 2 - Access the individual for which you want to add employment information on the EMPL screen.**

- The Person Resolution screen will be displayed after you do a Person Look Up. Follow your institution’s policy for using LookUp to find a record and for searching for duplicate records.
  - See Adding a Person

### **Step 3 - Enter the name or record ID for the organization for which this individual works.**

- If this individual is self-employed, do not enter an organization. Click on OK and the EMPD screen is displayed.
- When you specify this individual’s employer, the EMPD screen is displayed.
- If you did not specify an organization when prompted, you must go back to the Employer field and access the EMPD screen as a detail screen.
  - See first bullet.
- If the Organization Resolution screen is displayed, follow your institution’s policy for using LookUp to find a record and for searching for duplicate records.
  - See Adding an Institution

### **Step 4 - Complete the EMPD screen.**

- If this individual is self-employed, leave the Employer Name field blank and enter “Self-Employed” in the Title field.

### **Step 5 - Save your work.**

- From the EMPL screen, you can repeat this procedure to add additional employment information for this individual.

## **Optional Use of the EMPL screen:**

The Employment Information (EMPL) screen can be utilized to track internships and/or field-based work that students may do outside of your institution.

### **Step 1 – Set up the Organization that your campus is working with on ORGP.**

- The Internship Agencies would need to be set up as organizations.

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## **Step 2 – Attach the student (s) to the Organization on EMPL by entering the ID of the student and then the ID of the Employer (Organization)**

- Adding the employer will take you to the Employment Detail Information (EMPD) screen.
- Finish entering the following information

## **Step 3 – Enter the job Title**

- This is a free form text field

## **Step 4 – Enter the Position Code**

- Enter GA for Graduate Assistant
- Enter GRA for Graduate Research Assistant
- Enter GTA for Graduate Teaching Assistant

## **Step 5 – Enter the Start and End dates of the Internship**

## **Step 6 – Enter the Empl Status**

## **Step 7 – Enter hours/week**

- This can be used for load certifications for graduate teaching/research assistants not taking a full load of course work but performing research or teaching instead.

## **Step 8 – Update the EMPD -> EMPL screen.**

## **Viewing Employee Summary**

### **Step 1 – Access the Employee Summary (EMSU) screen**

### **Step 2 – Enter the Organization at the lookup**

### **Step 3 – A listing of the employees for that organization is displayed**

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## **Ending an Employment Record**

Responsibility: Home

**Step 1 – Access the Employment Information (EMPL) screen**

**Step 2 – Enter the student ID or name at the person lookup prompt**

**Step 3 – Detail on the Employer to the Employment Detail Information (EMPD) screen**

**Step 4 – Enter an End Date**

**Step 5 – Enter an Employment Status**

- F1 twice for a listing of statuses

**Step 6 – Update the EMPD -> EMPL screens**

## Recording High School Academic History

Responsibility: University/ESC

Follow the procedures to record high school information for an individual.

**Note:** This procedure assumes that the person whose information you want to update or change already has an existing record on your database. For a procedure for adding a person's record to the database, see "Adding and Updating a Person's Information". Be sure to carefully follow your institution's procedures for LookUp and record identification before you add a record for a person to your database.

**Step 1 - Read "Understanding Academic History and Credentials" at [clients.datatel.com](http://clients.datatel.com).**

**Step 2 - Access the Institutions Attended Information (IASU) screen.**

**Note:** When accessing the IASU or HSA screen, if you receive the (A) to Add an Institution, Shift F8 (Cancel) and contact ESC to add an institution. Do not add an institution record via these screens.

- If there are institution(s) already listed, find the one you are looking for and detail (F2) on it. If the institution(s) you are looking for is not listed, do a lookup on institution; choose the correct institution. To further limit a name search, enter a semicolon followed by one of the abbreviations listed below after the name:

c = city  
st = state

For example, enter [lincoln;st SD] to retrieve records for any institution whose name contains "lincoln" and is located in South Dakota.

- Recording unique high schools attended
  - If the applicant received a GED, it will be recorded on the IASU screen as a high school attended titled "GED".
  - If the applicant was Home Schooled, the high school institution attended would be Home School.
  - If the applicant attended a **high school** outside of the United States, use the institution code for "Non-U.S. Schools"

**Step 3 - Access the record of the individual for whom you want to add high school academic history information.**



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- If you need to add a new person record here, the Name and Address Entry screen is displayed.
  - See “Adding a Person” for procedures on how to add a person to the database.
- If the Person Resolution screen is displayed, follow search procedures for using LookUp to find a record and for searching for duplicate records.

## **Step 4 - Access the high school institution from which this individual earned a degree.**

- When you enter a high school institution at the Institution LookUp prompt, the High Schools Attended (HSA) screen is automatically displayed.
- If the high school institution you need is not defined in the database, you cannot add it from this screen.
  - See “Adding an Institution” for details on adding an institution.

## **Step 5 – Define the following fields on the HSA screen.**

### **Transcript Type:**

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**Partial High School Transcript:** Transcripts that are not complete or where the student is still enrolled

Transcript Type	PHS; Partial High School
Date	Date transcript was received
Status: OF	The transcript is an original sent from an institution to an institution, does not appear to be tampered with, is not a fax and has a signature and seal.
Status: UN	The transcript appears to be tampered with, is a fax, was issued or delivered by the student, or does not have a signature and seal.
Status: NR	Transcript was not received

**Final High School Transcript:** A complete transcript received from the high school, not the student, that is complete with a graduation date.

Transcript Type	HS; Final High School
Date	Date transcript was received
Status: OF	The transcript is an original sent from an institution to an institution, does not appear to be tampered with, is not a fax and has a signature and seal.
Status: UN	The transcript appears to be tampered with, is a fax, was issued or delivered by the student, or does not have a signature and seal.
Status: NR	Transcript was not received

**GED: A GED was received.**

Transcript Type	GED
Date	Date the GED documentation was received
Status: OF	The test score certification is an original, does not appear to be tampered with and is not a fax. A GED Certificate or Diploma is not acceptable.
Status: UN	The certificate appears to be tampered with or is a fax
Status: NR	Certificate was not received

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**Home School The student was home schooled. .**

Transcript Type	HMS
Date	Date the HMS documentation was received
Status: OF	Blank
Status: UN	Blank
Status: NR	Blank

This is a multi-valued field. Enter each incoming type of transcript on a new line.

**Years Attended:**

- Enter the graduation year for both the start and end years. For example, for seniors graduating in May of 2003, enter 2003 for both the start and end year.

**Note:** If a GED certificate was received, enter the year the certificate was issued in both elements.

**Start/End Date:**

- Enter the same date for both the start and end dates. If only the month and year of graduation are known, use the last day of the month for the day of graduation. For a 2003 graduating senior, the start and end date would be ‘053103’. For a junior enter ‘053104’

**Note:** If a GED certificate was received, enter the date the certificate was issued in both elements.

**Note:** If the individual was Home schooled, enter the year provided by the individual in both elements.

**Rank and/or Percent:**

- Enter the rank (1/5).
- The percent will default in.

**Graduation Type:**

- Enter graduation type  
 Y - Graduated                      O - Other  
 N - Not Graduated                H - Home School  
 G - GED

**NOTE:** Enter (N) Not Graduated until a final transcript, with the graduation date, is received.

**NOTE:** If a GED certificate was received enter (G) GED in Graduation Type only if the test was passed. If the GED test was not passed, enter (N) Not Graduated.

**High School GPA:**

- Enter Cumulative High School GPA.
- The GPA entered in this field should be on a 4-point scale. If a different GPA scale was used, it will have to be converted to a 4-point scale. Call the high school and ask them to convert the applicant’s GPA to a 4-point scale.

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**NOTE:** If the GPA was entered previously and a new GPA is not available, delete the old GPA (Ctrl-D). The old GPA might have been an estimate given by the applicant during prospecting.

## **Acad Credentials:**

- Detail to **HSAC** and complete:
  - **Degree MM/YR:** Enter HS as the degree and mm/yy of the graduation date, e.g. 05/01. This is needed for IPED reporting.  
**NOTE:** For GED and Home School, enter the value of HS and the date of the certificate or home school dates.
  - **Finish to return to HSA**

## **Comments:**

- Date and time stamp first, then
- Enter a comment as to where the original transcript is housed. Format the comment as follows: transcript type: university making the comment i.e. PHS: USD.
  - Once an official transcript has been received, the student should not be asked to send another if they change institutions.

## **Step 6 – Update the HSA screen.**

- When you save your changes from the HSA screen, you are returned to the IASU screen.
- You can either add more academic history/credential information for this individual, or you can save your changes to exit the screen or add academic history information for another individual.

# South Dakota Colleague System Procedures

## Recording College Academic History and Credentials

Responsibility: University/ESC

Follow the procedures to record college information for an individual.

**Note:** This procedure assumes that the person whose information you want to update or change already has an existing record in the database. For a procedure for adding a person's record to the database, see "Adding a Person". Be sure to carefully follow search procedures for LookUp and record identification before you add a record for a person to the database.

**Step 1 - Read "Understanding Academic History and Credentials" at [clients.datatel.com](http://clients.datatel.com).**

**Step 2 - Access the Institutions Attended Information (IASU) screen.**

**Note:** When accessing the IASU or HSA screen, if you receive the (A) to Add an Institution, Shift F8 (Cancel) and contact ESC to add an institution. Do not add an institution record via these screens.

- If there are institution(s) already listed, find the one you are looking for and detail (F2) on it. If the institution(s) you are looking for is not listed, do a lookup on institution; choose the correct institution. To further limit a name search, enter a semicolon followed by one of the abbreviations listed below after the name:  
c = city  
st = state
- For example, enter [lincoln;st SD] to retrieve records for any institution whose name contains "lincoln" and is located in South Dakota.

**Step 3 - Access the record of the individual for whom you want to add college academic history/credential information.**

- If you need to add a new person record here, the Name and Address Entry screen is displayed.
  - See "Adding a Person" for procedures on how to add a person to the database.
- If the Person Resolution screen is displayed, follow search procedures for using LookUp to find a record and for searching for duplicate records.

**Step 4 - Access the college institution from which this individual earned a degree.**

- When you enter a college institution at the Institutions LookUp prompt, the Institutions Attended (INAT) screen is automatically displayed.
- If the college institution you need is not defined in the database, you cannot add it from this screen.

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**Note:** The universities will not add institutions. This will be done centrally (ESC). If the end user receives the Record not Found, enter A to Add, cancel from the screen.

**Step 5 – Define the following fields on the External Institution Attended (INAT) screen.**

**Transcript Type:**

**Partial Post Secondary Transcript:** Transcripts that are not complete or where the student is still enrolled

Transcript Type	PPS; Partial Post Secondary
Date	Date transcript was received
Status: OF	The transcript is an original sent from an institution to an institution, does not appear to be tampered with, is not a fax and has a signature and seal.
Status: UN	The transcript appears to be tampered with, is a fax, was issued or delivered by the student, or does not have a signature and seal.
Status: NR	Transcript was not received

**Final Post Secondary Transcript:** A complete transcript received from the post secondary institution, not the student, that is complete with a graduation date.

Transcript Type	PS; Final Post Secondary
Date	Date transcript was received
Status: OF	The transcript is an original sent from an institution to an institution, does not appear to be tampered with, is not a fax and has a signature and seal.
Status: UN	The transcript appears to be tampered with, is a fax, was issued or delivered by the student, or does not have a signature and seal.
Status: NR	Transcript was not received

This is a multi-valued field. Enter each incoming type of transcript on a new line.

**Start/End Date:**

Enter the date the applicant started attending the institution. Enter the end date if the student has left the institution. Use approximate dates as follows:

	Start	End
Fall quarter or semester	09/01/xxxx	12/31/xxxx
Spring semester	01/01/xxxx	05/31/xxxx
Winter quarter	01/01/xxxx	03/15/xxxx

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Spring quarter	03/16/xxxx	05/31/xxxx
Summer term	0601/xxxx	08/31/xxxx

## Acad Credentials:

- For graduate, second degree, and certification students, detail and enter degree information.
- Degrees:
  - If a transfer student has received a degree from another institution, this must be recorded on IASU.
  - Detail on the Acad Credentials field
  - The Academic Credentials (AACR) screen is displayed.
    - Enter the type of degree (e.g. BA, BS, AS) and the date it was awarded (MM/YY).
  - To record information about theses, dissertations, and honors associated with a particular credential, access the Additional Academic Credentials (ADCR) screen from the Addnl Cred Info field on the AACR screen.

## Comments:

- Date and time stamp first, then
- Enter a comment as to who holds the original post-secondary transcript
  - Subsequent institutions should check if the student has had additional attendance or grade changes at the external institution

## Step 6 – Update the INAT -> IASU screens

- When you save your changes from the INAT screen, you are returned to the IASU screen.
- You can either add more academic history/credential information for this individual, or you can save your changes to exit the screen or add academic history information for another individual.

# South Dakota Colleague System Procedures

## **FACILITIES**



**Defining Facilities****Responsibility: University for university owned buildings & Central for common buildings****Timeframe: As needed**

Complete the following steps to define your facilities. This procedure provides the steps necessary to define buildings, rooms, and equipment for one particular campus or site. If your institution has multiple campuses or sites, repeat this procedure to define each one.

**Step 1 – Access the Buildings (BLDG) screen**

- At the Building LookUp prompt, enter a code for the building you want to define.
  - Buildings located on the each main campus will be university smart-coded.
    - The first character of the code will be the university code except in the case of common facilities
    - I.e. Uxx for USD buildings where xx is the building code & COFC, SFCE or RCHE for common buildings
- If the building is not found, enter (A) to add the record
  - Follow your institution's guidelines on searching for duplicate records before creating a new building.
  - You can modify the information for an existing building by entering the building code at the building lookup prompt
  - You can view a list of buildings by enter your university code and ...
    - For example, U... will pull in a resolution screen of all the buildings on the USD campus

**Step 2 - Enter information to define the building.****Description**

- Enter a description of the building (typically the name of the building).

**Sector**

- Enter a sector to further narrow down the location of a building.
  - For example, OCL – Out of City, MCL – Main Campus, CCL – City-Not Main Campus

**Address**

- Enter the address of the building

**Institution Code**

- Enter your Regental university code.

**Ownership Status**

- Enter the ownership status of the building
  - For example, owned, leased, shared
  - F1 twice for a listing

**Construction Type**

- Enter the construction type of the building
- For example, wood, quonset, concrete

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- F1 twice for a listing

## **Construction Year**

- Enter the year in which the building was completed and put into use.

## **Renovation Year**

- Enter the year in which the building renovations were completed

## **Building Condition**

- Enter the condition code for the building

## **Access Status**

- Enter the access available for this building
- For example, wheelchair access, standard week hours
- F1 twice for a listing

## **Landmark**

- Enter Y if this building is a landmark

## **Size**

- Enter the size of the building
  - Free form text
  - Include the unit of measurement along with the value

## **Gross Area**

- Enter the gross area of the building

## **Net Area**

- Enter the net area of the building

## **Perimeter**

- Enter the perimeter of the building

## **Building Type**

- Enter the building type
- For example, ADM – Administration, HOUS – House
- F1 twice for a listing

## **Fire Alarm information**

- The Board of Regents will use this information to help them check on insurance company adjustments they might receive based on the types of “building protection devices” a building has. The following codes have been approved:
  - HD – Heat Detection
  - BA – Burglar Alarm
  - SD – Smoke Detection
  - SP – Sprinkler Systems
  - FA – Fire
  - EL – Emergency Lighting
  - FE – Fire Extinguishers
  - SE – Secured Entrances
- Notify RIS of the fire alarms codes to be added to a particular building.

### **Step 3 - Enter a room number to define a room in this building.**

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- Go to the first blank line of the Room field.
- Enter a room number at the Enter a Room Number to Add prompt.
- When you add a new room number, the Rooms (RMSM) screen is displayed.
  - The RMSM screen is available only as a detail screen.
  - You can modify information for an existing room by selecting that room and detailing to the RMSM screen.
  - The RMSM screen can also be displayed by going directly to the Building/Rooms Summary (BRMS) screen and entering the building code at the lookup

## **Step 4 - From the RMSM screen, enter information to define the room.**

### **Description**

- Enter a description of the room.

### **Category**

- Enter the room category that describes the use of the room
- F1 twice for a listing

### **Primary/Secondary Usage**

- Enter the primary/secondary usage of the room
- Use ... for a lookup

### **Room Characteristics**

- Enter the characteristics of the room
- For example, room darkening shades, chairs, or items that are attached such as Periodic Charts
- F1 twice for a listing

### **Access Status**

- Enter the access available for this room
- For example, wheelchair access, standard week hours
- F1 twice for a listing

### **Room Phone**

- Enter any corresponding room phone numbers

### **Wing**

- Enter the wing of the building that this room is location
- For example, N-North, S-South

### **Floor**

- Enter the floor this room is located on

### **Natl ID**

- Enter the CIP code associated with this room

### **Room Type**

- Enter the type of the room
- For example, AU-Auditorium
- Use ... for a lookup

### **Capacity**

- Enter the room capacity

### **Area**

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- Enter the amount of usable area in the room

## **Rate Cls**

- If this is a residence hall room, enter whether it is a single, double, quad, etc

## **Box**

- Enter the box number associated with this room
  - A box number that is associated with the student can be entered on DADD.
- For residence halls, this will default to the ADR screen once the room assignment has been updated.

## **Misc**

- CLRM.M1 is for year a room was last painted, and
- CLRM.M2 is for agency code, which is kind of a campus location code, that was used in the legacy facilities system

## **Responsible Dept**

- Enter the department with overall responsibility for this room

## **Coordinating Dept**

- Enter the department that coordinates activities for this room

## **Room Coordinator**

- Enter the person who should be contacted to schedule use of this room.

## **Contact Role**

- Enter the role of the person in this room

### **Step 5 - Enter any equipment located in this room (equipment is not fixed and can be removed from the room).**

**NOTE:** Equipment will need to be defined on the Equipment (EQPM) screen before attaching to a Room.

- Go to the Equipment field and detail to the Room Equipment (FXEQ) screen.
- Add general information about the quantities and types of equipment in this room in the Equipment group.

### **Step 6 – If a room was added to an existing building, adjust the net area and/or gross area by the corresponding room area change made on the RMSM screen**

### **Step 7 - Save your work.**

- To define another room in the same building, go back to the BLDG screen and add another room number (see step 3).
- When you save your changes, you are returned to the previous screen.
- You must successively save your changes at each screen or the information will be lost.

### **Step 8 – Notify RIS of the data elements that need to be populated into XH.BUILDINGS when adding a new building**

- Building name and abbreviation,

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- This is the code used to add the building on BLDG screen
- Building original cost
- Building estimated replacement cost (usually the same as orig cost)
- Fire alarm code (FD, PK, ND, FA or NR)
- Air conditioning in tons
- Is building insured code (I, N)
- Number of floors code (B, 1, 2, 3, 4, 5, 6, P)
- Building usecode code (AES, AUX, LEASE, MUS, NBLDG, RVACX, RVFAC, RVAC).
- Upon receipt of this information, RIS will populate the XH.BUILDINGS file with this information to complete the process to add a building.

# South Dakota Colleague System Procedures

## **Deleting a Building**

**Responsibility: University**

**Timeframe: Ongoing**

**Step 1 – Access the Buildings (BLDG) screen for the building to be deleted.**

**Step 2 - Enter the Terminate code of ‘TE’ in the Building Condition field**

**Step 3 - Mark each room in the building as deleted.**

- **See Deleting a Room**

**Step 4 - Update the comments section with information regarding the delete.**

**Step 5 – Update the BLDG screen**

**Note:** The building, nor its associated rooms, will not physically be deleted from the system, only marked that they are deleted. Facilities Profile module users should be aware that they are not to alter data of deleted buildings or their deleted rooms. To help ensure that this doesn't happen, campuses may elect to modify the building name to include the word or phrase 'delete', 'deleted', or 'do not use', etc to warn users.

# South Dakota Colleague System Procedures

## **Deleting a Room**

**Responsibility: University**

**Timeframe: Ongoing**

**Step 1 – Access the RMSM screen via BLDG or BRMS for the building in which the room exists.**

**Step 2 - Enter the Delete code of 'DEL' in the Primary Usage field**

**Step 3 - Enter the Delete code of 'DEL' in the Room Type field**

**Step 4 - Set Room capacity to 0.**

**Step 5 - Set Area to 0.**

**Step 6 - Update the comments section as needed.**

**Step 7 - Subtract the room area value from the BLDG net area and/or gross area value so the two remain in synch.**

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## **Viewing Buildings and Rooms**

Responsibility: University

### **To View Rooms for a Specific Building**

**Step 1 – Access the Buildings/Room Summary (BRMS) screen**

**Step 2 – Enter your smart coded building at the lookup**

**Step 3 – A listing of rooms for that building is displayed**

**Step 4 – Detailing on the room will display the room summary**

### **To View Buildings**

**Step 1 – Access the Buildings (BLDG) screen**

**Step 2 – At the Building Lookup prompt, enter the university code and ... for a listing of buildings for that university**

- For example, U... would pull a resolution screen of all USD buildings

**Step 3 – Selecting a building will display the building definitions**



# South Dakota Colleague System Procedures

## **Defining Resources**

Responsibility: DA Group

Use the Resource Setup (RESU) screen to define the resources your institution needs for an activity or event.

### **Step 1 – Access the Resource SetUp (RESU) screen**

### **Step 2 – At the Facility LookUp prompt, enter the ID of a facility**

- If the facility is not found, a Record not found, Enter A to Add prompt is displayed
- Enter A to add

### **Step 3 – Define the Building/Room**

### **Step 4 – Define the Resource Type**

- Enter a facility type
- For example, restaurant

### **Step 5 – Define the Resource Description**

### **Step 6 – Enter the Area and Capacity of the resource**

### **Step 7 – Enter the Contact Role, Name and Phone number**

### **Step 8 – Update the RESU screen**

# South Dakota Colleague System Procedures

## Defining Campus Calendars

University: DA Group

Complete the following steps to define a campus calendar:

### Step 1 - Familiarize yourself with the process of creating a campus calendar.

- The default Campus Calendar entered on the PID2 screen in Core is used by Colleague when building the Course Section Meeting Dates on the SOFF (Section Offering) screen in ST. That is the only calendar that Colleague will use for those meeting dates, faculty office hours and in determining holidays for billing purposes.
- See “Understanding Campus Calendars”.

### Step 2 - Access the Campus Calendars (CMPC) screen.

- The Campus Calendars (CMPC) screen is displayed with the cursor at the Campus Calendar LookUp.

### Step 3 - Enter the name of the new campus calendar.

- Enter (A) to confirm that you want to create a new calendar.
  - The name of the new campus calendar displays in the header of the CMPC screen.
  - The cursor displays at the Description field.
  - If you want to maintain a calendar which already exists, enter the calendar code at the LookUp and Colleague displays the information on the CMPC screen.
  - Skip to the step below which describes the characteristic of the calendar you want to maintain.

### Step 4 - Enter the following information for this campus calendar:

- a short description
- default start and end times
- default E-mail notice type
- Book Past No. of Days – this field will allow for the scheduling of course section meeting dates once the semester has already begun as it will build the meeting dates from the beginning of the course section to the end. If this field is blank and you want to build the meeting dates after the semester has begun, the dates will only be built from the day you build them to the end of the course section.
  - Enter 400
- the academic term to associate to the calendar (this is most often left blank, especially if using a “MAIN” calendar as the default on PID2.
- See “Characteristics of a Campus Calendar”.

### Step 5 - If you want to define a special day for this campus calendar, do the following:

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## South Dakota Colleague System Procedures

- move to the first blank line of the Special Day group on the CMPC screen
- detail to the Campus Calendar Special Days (CMPS) screen
- fill out the CMPS screen to define your special day
- update the record
- The Campus Calendars (CMPC) screen is redisplayed with the cursor on the next blank line of the Special Day group.
- For more information about creating special days, see “Campus Calendar Special Days”.
- You can also view information about an existing special day by detailing on it.

**Step 6 - Repeat step 5 for each additional special day you want to associate with this campus calendar.**

**Step 7 - Save the campus calendar record.**

# South Dakota Colleague System Procedures

## Miscellaneous Scheduling

Responsibility: University

Complete the following steps to schedule a miscellaneous event:

### **Step 1 - Familiarize yourself with the process of scheduling a miscellaneous event.**

- See “Understanding Miscellaneous Scheduling”.

### **Step 2 - Access the Miscellaneous Scheduling (MSCH) screen.**

- The Miscellaneous Scheduling (MSCH) screen is displayed with the cursor at the Misc. Events LookUp prompt.

### **Step 3 - Enter the name of the new event.**

- Enter (A) to confirm that you want to create a new event.
  - The name of the new event displays in the header of the MSCH screen.
  - The cursor displays at the Description field.
- If you want to maintain an event which already exists, enter the event at the LookUp and Colleague displays the information on the MSCH screen.
  - Skip to the step below which describes the characteristic of the event you want to maintain.

### **Step 4 - Define the characteristics of the event.**

- See “Defining the Event”.

### **Step 5 - If you want to check the schedule and verify the availability of the facilities, rooms and participants, do the following:**

- move to the Check schedule field
- enter Y
  - When you move from the field, Colleague checks the schedule.
    - If any conflicts exist, Colleague displays a warning describing the first schedule conflict.
      - See “Checking the Schedule”.
    - Remember that this does not reserve anything, but is only checking existing reservations.

### **Step 6 - If you want to reserve all of the defined resources for the event, do the following:**

- move to the Rebuild Dates field
- enter Y
  - When you move from the field, Colleague builds all the schedule records necessary to reserve all of the defined resources.
    - See “Rebuilding the Schedule”.

# South Dakota Colleague System Procedures

**Step 7 - If you want to view the entire schedule for the event, detail to the Misc Scheduling Summary (MSCS) screen from the View Schedule field.**

- See “Viewing the Schedule”.

**Step 8 - Update the record.**

# South Dakota Colleague System Procedures

## **APPENDIX**

## Appendix - Duplicate Record Cleanup

Responsibility: University

### Procedure for Handling Duplicate Records for same person in Colleague:

#### Step 1 - Identify Duplicate Records

##### Batch Identification

- Pending Issue: A new download/SAS/Access report needs to be developed in the merged environment to identify duplicate records in batch.
- Contact person: SDSU-Michelle Kuebler; SDSMT-Deb Renken; USD-Ellen Engelking; DSU-Amy Olson; BHSU-Michelle Hoffman;
- Peak times would be during summer new student days, the fall recruitment times and ACT tape loads. It is estimated the process would be run at least once a month.

##### Individual Identification

- How do you know if you have a duplicate record?
  - Compare the SSN
    - Is it the same?
    - Is it close? Have the numbers been transposed?
  - Compare the Last, First, Middle name
    - Is it the same?
    - Is it close? What is the nickname? What are the other names?
  - Compare the birth date
    - Is it the same?
    - Is it close? Have the numbers been transposed?
  - Compare the address, including the e-mail address
    - Is it the same?
  - Compare the phone number
    - Is it the same?
  - Compare the high school graduation date
    - Is it the same?
  - Compare the academic history
    - Is it the same?
- If one or more of the above are the same – **STOP**
  - Provide the information that leads you to believe you have a duplicate record to the universities involved
  - Do Not process the record any further
  - The universities will continue with Step 2

#### Step 2 - Determine which of the duplicate records to keep and which to mark as duplicates.

# South Dakota Colleague System Procedures

- Do a name lookup for each and note where used: APP, MAI, PER, FAC, FIN, VEN, STA, STU.
- If Social Security numbers exist on more than record, ask appropriate offices (in steps below) to determine correct SSN from source documents, NSLDS, or by contacting student.

## Step 3 - Clean up records

- If Financial Aid (FA) information exists:
  - On only 1 record:
    - Keep the record with the FA information.
    - If AR records exist on the record(s) that will not be kept, contact the Finance office to move payments (CRRE) and miscellaneous charges (MCRG) to correct account.
    - If RL records exist on the record(s) that will not be kept, contact Residence Life to move room and dorm assignments.
    - Move registrations from duplicate record(s) to correct record using back dates (prior to census date for that term) to cancel from incorrect and add to correct. (If course is already graded, remove the grade before canceling registration and add the grade on the correct record.)
    - Move other Academic History from incorrect to correct record.
  - On multiple records,
    - Contact Financial Aid Office to determine which record to keep and have them make appropriate updates to the records
    - If AR records exist on the record(s) that will not be kept, contact the Finance office to move payments (CRRE) and miscellaneous charges (MCRG) to correct account.
    - If RL records exist on the record(s) that will not be kept, contact Residence Life to move room and dorm assignments.
    - Move registrations from duplicate record(s) to correct record using back dates (prior to census date for that term) to cancel from incorrect and add to correct. (If course is already graded, remove the grade before canceling registration and add the grade on the correct record.)
    - Move other Academic History from incorrect to correct record.
- Else, if AR or Residence Life (RL) information exists:
  - On only 1 record:
    - Keep it.
    - Move other Academic History from incorrect to correct record.
  - On multiple records:
    - If AR records exist on the record(s) that will not be kept, contact the Finance office to move payments (CRRE) and miscellaneous charges (MCRG) to correct account.



# South Dakota Colleague System Procedures

- If RL records exist on the record(s) that will not be kept, contact Residence Life to move room and dorm assignments.
- Move registrations from duplicate record(s) to correct record using back dates (prior to census date for that term) to cancel from incorrect and add to correct. (If course is already graded, remove the grade before canceling registration and add the grade on the correct record.)
- Move other Academic History from incorrect to correct record.
  
- Else, if Academic History exists: (should only be records prior to Colleague unless enrollments were not entered using registration work flow)
- If only 1 record:
  - Keep it.
  
- If multiple records:
  - Contact Records Office to determine which record to keep and move History to correct record.
  - Move other Academic History from incorrect to correct record.
  
- Else, if Student Record exists:
- If only 1 record:
  - Keep it.
  
- On multiple records:
  - Contact Records Office to determine which record to keep and move student information to correct record. Check the following screens: SPRO/PERC/STRS/SDTD/STAL/SACS/SACP/SPSH/STPA/STAD/SACD/SHIS/STNT/ ASTR.
  
- Else, if Accepted Application exists:
- If only 1 record:
  - Keep it.
  
- On multiple records:
  - Contact Admission Office to determine which record to keep and move Application(s) to correct record.

## **Step 4 - When appropriate offices have completed the steps above, complete the move of information from the incorrect records to the correct one.**

- For records with Prospect/Application information (including tests or HS/Prior College), check the following screens  
PRSP/TSUM/TEST/NEQV/TEEV/  
NCRS/HACT/IHS/IHT/IASU/HSA/HSAC/INAT/HOME/AACR/ITR

## South Dakota Colleague System Procedures

- For Demographic information, check the following screens  
BIO/ADSU/ADR/NAE/ DADD/EMER/FNM/FINF
- Delete the NAE record, if possible.
- If the record could not be deleted:
  - Delete all possible information from incorrect records
    - This includes the SSN
  - Change the Last Name to “Zzz Error” on NAE
  - Enter “See XXXXXXXX”(where XXXXXXXX is the Colleague ID of the correct record) in the First Name field on NAE.
  - Set the privacy code to “X” on BIO.

**NOTE:** At least one person on each campus needs to have a privacy code of “X” on their XSVM record to view the erroneous records.

## Appendix - Record cleanup for Merged Records

Responsibility: UDA

### Step 1 - Identify Records that were combined that should not have been

#### Batch Identification

- UDAs will be responsible for record cleanup in the merged environment. It is anticipated that this group will identify a schedule for ongoing management of the process.

#### Individual Identification

- How do you know if you have a merged record?
  - Compare the SSN
    - Is it different in individual databases?
  - Compare the Last, First, Middle name
    - Is it different in the individual databases?
    - What is the nickname? What are the other names?
  - Compare the birth date
    - Is it different in the individual databases?
  - Compare the address, including the e-mail address
    - Is it different in the individual databases?
  - Compare the phone number
    - Is it different in the individual databases?
  - Compare the high school graduation date
    - Is it different in the individual databases?
  - Compare the academic history
    - Is it different in the individual databases?
- If one or more of the above are the same – **STOP**
  - Provide the information that leads you to believe you have a merged record to the universities involved
  - Do Not process the record any further
  - The university UDA will continue with Step 2

### Step 2 - Determine which of the merged records to pull out of the other

- Do a partial name lookup and/or use the ALT IDs from the merged record for each person in the individual old production accounts and note where used: APP, MAI, PER, FAC, FIN, VEN, STA, STU.
- Determine the base record in the new prod account
  - The record with the most FA, AR, STC information should be considered the base record in the new prod account
  - This record will remain intact until the other records are created
  - Then this record will need to have the information deleted that does not apply to this person
  - Enter CPDT on the PERC screen
  - Enter X privacy code on the BIO screen

# South Dakota Colleague System Procedures

## **Step 3 – Create new records that are split from the base record**

**Open two Colleague sessions, use one session for old individual prod accounts and the other session for the new prod account.**

- Access the Applicant Summary (ASUM) screen in the old individual prod account (used to view information)
  - Enter the name of the person that will be split out at the Person LookUp prompt
- Access the Applicant Summary (ASUM) screen in the new prod account
  - Enter the name of the person that will be split out at the Person LookUp prompt and enter A to add
  - Trace your steps through ASUM in the old individual prod account to the ASUM in the merge account; viewing all screens
    - Detail on Acad Program to APPN and enter admission/program information as it appears in the individual old prod account
      - Detail on Acad Pgm to STPA to enter any additional application info
      - Detail on Bal/Pay Now to enter application fees, if appropriate
      - Detail on Addnl Info to enter IASU, HSA, SSTR, INAT, EXTS, TSUM, NCWS, ARFA, HACT, ADFR, FPER, EMER, PGEC, CASM or ADAI information
      - Detail on Comments to view but enter the comments on CRI as an xACCMNT
        - Access CRI for the person;
        - Go to a blank line in #4;
        - Enter the xACCMNT CMC code where 'x' is the university noting the comments
        - Leave the instance field blank
        - Enter R (received) in the Status column
        - Make both the stat date and the assign date, the date of the actual comment.
        - Act Dt is blank
        - Then detail to CCET in the comment field and enter the comment information.
    - Detail on Comm Mgmt to view information to enter directly on IHS
    - Detail on Appl Stat and enter all statuses with applicable dates from the old prod account
      - MTS can not be entered; it needs to be moved when APPN is completed
  - Enter all Programs listed on the ASUM screen for all the records in the individual old prod accounts
  - Enter all Gen Prospect Statuses and dates for all the records in the individual old prod accounts

# South Dakota Colleague System Procedures

- Initial Contact/Date is now a Communications Mgmt code and will need to be entered on IHS
- Detail on Demographics to enter BIO, REL, DADD, NAE, ADSU, EMPL, FNM, or SPO information
  - If the field is a single value, the value should come from the base record determined in Step 2
  - If the field is a multi-valued field, all values from all records should be added as they appeared in the old prod accounts
  - Enter X privacy code on the BIO screen
  - Be sure to enter all relevant alternate identification (ALT ID) numbers and clearly document the ID type on the DADD screen. Currently, the SIMS ID represents the main ALT ID for which data entry is required.
- Detail on Remarks to enter any applicable remarks that were entered in the old prod accounts
- Detail on Comments to enter any applicable comments that were entered in the old prod accounts
- Detail on Misc/Spec Serv to enter any applicable miscellaneous fields
  - Some AMSC comments have been moved to other mnemonics, i.e. admitted on probation
  - See Admissions Specs & Conversion tables on [www.hpcnet.org](http://www.hpcnet.org) for more details
- Datatel will re-route the Financial Aid pointers to the correct account if there were multiple FA records merged together; otherwise, the base record should carry the FA
  - Make a note if the person had financial aid from two different pre-merge accounts
- Access the Person Restrictions (PERC) screen and enter CPDT
- Contact an AR representative at your university to move payments (CRRE) and miscellaneous charges (MCRG) to the correct account.
- Access the Residential Life (RMAS), Meal Plan (MPAS) or Payment Plan (PPLN) screens to record room assignments, meal plan assignments or payment plans.
- Access RGN to move registrations for F'03 forward from duplicate record(s) to the correct records using back dates (prior to census date for that term)
- Access STAL to create a level record for the student
- Access STAC to move other Academic History (prior to F'03) from incorrect to correct record.
  - Once this is completed, run a transcript from old prod and merge to verify information is accurate; and/or verify GPAs/Credits on XGPA

# South Dakota Colleague System Procedures

- Trace your steps through SPRO in the individual prod account to the SPRO in the merge account; viewing all screens
  - Detail on Advisor to enter advisors
  - Detail on Restrictions to enter restrictions
  - Detail on Addl Profile Data to verify residency
    - Detail on comments to enter all comments
  - Detail on Hiatus to enter hiatus records
- Access IASU and detail to HOME to enter graduation information

## **Step 4 - Once all the information has been traced from the old prod accounts to the new applicant/application/student record(s), the base record in the new prod account needs the information that does not pertain to it removed**

- Access the Applicant Summary (ASUM) screen in the individual production account (used to view information)
  - Enter the base record name of the person at the Person LookUp prompt
- Access the Applicant Summary (ASUM) screen in the new prod account
  - Enter the base record name of the person at the Person LookUp prompt
  - Trace your steps through ASUM in the individual prod account to the ASUM in the merge account; viewing all screens
    - Detail on Acad Program to APPN and delete admission/program information that does not appear in the individual old prod account
      - Detail on Acad Pgm to STPA to delete any additional application info
      - Detail on Bal/Pay Now to delete application fees, if appropriate
      - Detail on Addnl Info to delete IASU, HSA, SSTR, INAT, EXTS, TSUM, NCWS, ARFA, HACT, ADFR, FPER, EMER, PGEC, CASM or ADAI information
      - Detail on Comments to delete any comments as they were recorded in the old prod account
      - Detail on Appl Stat and delete all statuses and dates not listed in the old prod account
    - Delete all Programs listed on the ASUM screen that are not listed in the individual old prod accounts
      - If the application status is NAP, the whole application can be deleted
      - If the application has any status but NAP, the program can not be deleted. It should be changed to NAP instead with a comment explaining it was merged in error.
    - Delete all Gen Prospect Statuses and dates that are not listed in the individual old prod accounts
    - Detail on Demographics to delete BIO, REL, DADD, NAE, ADSU, EMPL, FNM, or SPO information

# South Dakota Colleague System Procedures

- Detail on Remarks to delete any applicable remarks that were not listed in the old prod accounts
- Detail on Comments to delete any applicable comments that were not listed in the old prod accounts
- Detail on Misc/Spec Serv to delete any applicable miscellaneous fields
  - Some AMSC comments have been moved to other mnemonics, i.e. admitted on probation
  - See Admissions Specs & Conversion tables on [www.hpcnet.org](http://www.hpcnet.org) for more details
- Contact an AR representative at your university to move payments (CRRE) and miscellaneous charges (MCRG) to the correct account.
- Access the Residential Life (RMAS), Meal Plan (MPAS) or Payment Plan (PPLN) screens to delete/end room assignments, meal plan assignments or payment plans.
- Access RGN to delete registrations for F'03 forward using back dates (prior to census date for that term) to cancel from incorrect and add to correct
- Access STAL to end a level record for the student, if applicable
- Access STAC to move other Academic History (prior to F'03) from incorrect to correct record.
  - If the section has been graded, remove the grade, enter a blank window in the status field and enter an X with a date before the semester starts
  - Once this is completed, run a transcript from old prod and merge to verify information is accurate; and/or verify GPAs/Credits on XGPA
- Trace your steps through SPRO in the individual prod account to the SPRO in the merge account; viewing all screens
  - Detail on Advisor to end advisors
  - Detail on Restrictions to delete restrictions
  - Detail on Addl Profile Data to verify residency
  - Detail on Hiatus to end hiatus records
- Access the IASU and detail to the HOME screen to delete graduation information

## **Step 5 - When the steps above have been completed,**

- Make a note of all the IDs that were created
- Make a note if the person was in Web Registry

# South Dakota Colleague System Procedures

## **Appendix - Using Custom Hierarchies**

Responsibility: University

**Note:** Datatel delivers a variety of Name and Address Hierarchies. These should not be deleted but you can add new hierarchies.

Many label and batch processes provide an option for using a Datatel provided hierarchy or a customized hierarchy. For examples, Student Labels and batch Transcripts (TRAN) and the Process Correspondence Batch (PCB) in Communications Management.

The front-end screens for these processes include a field where you can specify the name of the customized hierarchy that you want to use. By doing a look up “...” you can view the available Datatel delivered hierarchies as well as those created by your campus.

When you enter the name of a custom hierarchy in the appropriate field, these processes use your custom hierarchy automatically.



# South Dakota Colleague System Procedures

## Appendix - Datatel Address Maintenance Procedures

Responsibility: University

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# South Dakota Colleague System Procedures

## Categories of Address Records

Updating addresses correctly in Colleague R-17 is essential to the efficient management of address information. Because the addresses reside in the CORE module it is vital that all Colleague users follow these standards in maintaining address information. Many offices throughout campus rely on those who are maintaining addresses to do it correctly so that mailed materials will reach the person to whom they are intended.

The records for people in Colleague can be broken down into the following categories:

- Prospects,
- Applicants,
- Students and
- Graduates
- Employees
- Vendors (individual or corporation)

As a person moves through the system, various records are created along the way. Depending upon which category a person currently falls into determines which screen to begin the address maintenance. Before making any address changes for a person, you must determine which of the categories he/she falls into. Prospect and Applicant records should be maintained from PRSP–Prospect Summary, or ASUM–Applicant Summary respectively. To determine if a person is a student, begin at SPRO. If you receive an error message indicating that the person does not have a Student Record, go to ADSU or PRSP.

## Department Name on Generic Envelopes

When mailing materials to Prospects, Applicants, Students, or Alumni, it is important that the department preparing the mailing indicates its name in the return address area of the envelope so that address changes from the U.S. Post Office will be received by the sending department. If the sending department is not responsible for maintaining an address in Colleague, the address change information should be forwarded to the appropriate department.

## Maintaining Addresses of Students

To begin address maintenance for current students, use SPRO-Student Profile, an example of which is shown below.

# South Dakota Colleague System Procedures

**SPRO-Student Profile**

Price, Miss Jennifer      ID: 0000295 SSN: 236-01-0063 Student  
 Hauppauge NY 11893

Preferred Mailing Address: 815 Olive Road, Hauppauge NY 11893  
 Preferred Residence: 815 Olive Road, Hauppauge NY 11893

Change Address

Academic Program	Cust Pgm	Acad Level	Status	Status Date	Ant Cmpl Date	Admit Status
1 HIST.BA	No	UG	Active	10/17/01		First Time F

Student Types/Date: 1 SENR Senior Citizen      10/17/01

Home Location: 1  
 Advisors: 1  
 Restrictions: 1

Directory/Privacy:   
 Terms:       Locator:       Hiatus:   
 Transcripts:       Addl Profile Data:       Demographics:

To determine whether a student or graduate is Continuing Ed, look at the Academic Programs the student has listed under “Academic Program” in the middle of the screen.

All other programs will be those of non-Continuing Ed students and their addresses should be maintained by the Records Department. Examples of Academic Programs include (*your examples here*). There are too many Academic Programs to list them all here, but they would include any programs the college may offer. Students may have more than one active program at a time, so you may need to scroll down to see all of them.

Also note the Status of the Academic Program to determine whether the student is an active student or a graduate. For graduates, addresses need to be maintained both in Colleague and in Benefactor (*if your college has this*) that is used by (*your alumni office name here*). Forward a copy of the new address to (*your alumni office name here*) for graduates.

An employee’s address change should be forwarded to the Human Resources office. To determine if a person is an employee, when looking up the person’s name you will be taken to a Person Resolution screen. Under the person’s address you will see abbreviations such as APP, STU, HRPER, and EMP. The HRPER and EMP abbreviations indicate that the person is, or has been, an employee.

The next step is to Detail from SPRO to ADSU-Address Summary, by clicking in the “Change Address” box and detailing. An example of ADSU is shown below.

# South Dakota Colleague System Procedures

SPRO-Student Profile ADSU-Address Summary

Price, Miss Jennifer ID: 0000295 SSN: 236-01-0063 Student  
 Hauppauge NY 11893

	Address Lines	Status	Residents	Type
1	815 Olive Road Hauppauge, NY 11893	Current	Miss Jennifer Price	Home/Perma
2				
3				

Controller Address Lines Value 1/1

Note that the most recent address should always appear at the top with a status of “Current.” The type of addresses is also shown on this screen. A person most usually will have one current Home and one current Business address at the same time.

To change an address appearing on ADSU to “Former,” click on the Detail button to the left of the address and Detail to ADR-Person Addresses by clicking OK. Type the new address over the old/former address, choose a “Type” such as “H” for Home, “B” for Business, indicate that this is the “Mail Pref” and “Pref Res” with ‘Yes’, check that the Effective Start Date is correct and enter the source of the address change information in the Source field, and save out of ADR. Answer “Yes” to keep address history. The previous address (the one that was typed over) will be made Former and an end date will be entered without having to actually go to that address record.

# South Dakota Colleague System Procedures

SPRO-Student Profile | ADSU-Address Summary | ADR-Person Addresses

Price, Miss Jennifer ID: 0000295 SSN: 236-01-0063 Student  
Hauppauge NY 11893

Address 1 213 Rappahanock Dr Eff. Start 05/01/02  
2  
Modifier  
City/St/Zp Hauppauge NY 11893 Eff. End  
Country  
County  
Type 1 H Home/Permanent Seasonal Date(s)  
2  
Mail Pref Yes Route Code  
Pref Res Yes Time Zone

Phone(s)..... Extension.  
1  
2

Person Mail Rules 1  
Address Mail Rules 1

E-Mail Address(s)  
1  
2

Source Change o  
Date 05/29/02  
By ELB

**Alert**  
Do you want to keep address history [Y/N]?  
Y N

To add a new, additional address, click in the next box without an address appearing next to it and click on the Detail button. This will give you a blank ADR screen to put the new address information into. Be sure to enter a Status of Current and the appropriate address type, such as Business, Check or Alternate.

After entering the new address and saving out of ADR, you will be returned to ADSU.

Save out of ADSU and you will be returned to SPRO.

**Note:** The new address information will appear in the red header block at the top of the screen, but the new telephone numbers will not appear in the header block until the record is queried again. Likewise, the Preferred Addresses just below the red header block will not display the correct information at this point. When the record is queried again the correct Preferred Addresses will appear.

**Note** that when you are returned to SPRO after saving out of ADSU, “Yes” appears in the Change Address Box. To complete the address maintenance, save out of SPRO.

## Cell Phone and Pager Numbers

# South Dakota Colleague System Procedures

Whenever an ADR record of a person with a phone number with the types of Cell or Pager is accessed, the phone number will appear in the ADR record. Because Cell Phone and Pager numbers tend to remain more stable than other types of phone numbers, these numbers are assigned special processing by Colleague that saves them separately from any other address records. Since these numbers are saved independent of any address record, they will appear on both Current and Former ADR screens. **Do not delete these from the ADR screen unless it is a wrong number, as it will be permanently deleted from all ADR screens.**

## E-mail Addresses

E-mail addresses are similar to Cell Phone and Pager numbers in that they are not saved with any particular address record, even though they will appear and can be maintained on the ADR screen. Use the e-mail address type of (*Your defined email type here*) for the address to which the student wants e-mail sent directly from Colleague. For example, an Academic Evaluation “Eval” can be sent directly from Colleague to the e-mail address with the e-mail type of (*Your defined email type here*). If the student provides additional e-mail addresses, use the type of (*Your additional email type here*) so Colleague can determine which one to send messages to. If you delete an e-mail address from the ADR screen, it is deleted from all screens, so be careful when maintaining them.

## Maintaining Addresses of Prospects and Applicants

Since the steps for maintaining addresses are very similar whether you begin at PRSP-Prospect Summary or ASUM-Applicant Summary, only the instructions for maintaining applicants addresses follow. To begin maintaining an address for an applicant, go to ASUM and enter the person’s name or ID number.

To determine whether a student or graduate is Continuing Ed, look at the Academic Programs the student has listed under “Academic Program” in the middle of the screen.

All other programs will be those of non-Continuing Ed students and their addresses should be maintained by the Records Department. Examples of Academic Programs include (*your examples here*). There are too many Academic Programs to list them all here, but they would include any programs the college may offer. Students may have more than one active program at a time, so you may need to scroll down to see all of them.

Also note the Status of the Academic Program to determine whether the student is an active student or a graduate. For graduates, addresses need to be maintained both in Colleague and in Benefactor (*if your college has this*) that is used by (*your alumni office name here*). Forward a copy of the new address to (*your alumni office name here*) for graduates.

The next step is to Detail in the “Demographics” field that appears in the lower third of the screen. When you detail from ASUM you will have several choices as to which screen to go to.

Click on ADSU–Address Summary and then click OK. The ADSU screen will appear.

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Note that the most recent address should always appear at the top with a status of “Current.” The type of addresses is also shown on this screen. A person usually will have only one current Home and one current Business address at the same time.

To change an address appearing on ADSU to “Former,” click on the Detail button to the left of the address and Detail to ADR-Person Addresses by clicking OK. Type the new address over the old/former address, choose a “Type” as “H” for Home, “B” for Business, indicate that this is the “Mail Pref” and “Pref Res” with ‘Yes’, check that the Effective Start Date is correct and enter the source of the address change information in the Source field, and save out of ADR. Answer “Yes” to keep address history. The previous address (the one that was typed over) will be made Former and an end date will be entered without having to actually go to that address record. To change an address already appearing on ADSU to “Former,” click in the blue box next to the address and Detail to ADR-Person Addresses by clicking OK.

Change the Status to “Former,” indicate the source of the address information in the Source field, and save out of ADR.

To add a new, or additional, address, click in the next available line without an address appearing next to it and detail. This will give you a blank ADR screen to put the new address information into. Be sure to enter a Status of Current and the appropriate address type, such as Home. You must also put a “Y” for Yes in the “Mail Pref” and “Pref Res” boxes if this is the preferred mailing and residence address.

After entering the new address and saving out of ADR, you will be returned to ADSU.

Save out of ADSU and you will be returned to ASUM.

**Note:** The new address information will appear in the red header block at the top of the screen, but the new telephone numbers will not appear in the header block until the record is queried again. Also, in order to have the “Work” number appear in the header block, you must enter a separate record into ADR with the Business Phone number and the Address Type of Business. It is not necessary to enter a street address. If you enter the Business Phone number on the Home Address ADR screen, the number will not appear in the red header block.

## Cell Phone and Pager Numbers

Whenever an ADR record of a person with a phone number with the types of Cell or Pager is accessed, the phone number will appear in the ADR record. Because Cell Phone and Pager numbers tend to remain more stable than other types of phone numbers, these numbers are assigned special processing by Colleague that saves them separately from any other address records. Since these numbers are saved independent of any address record, they will appear on both Current and Former ADR screens. Do not delete these from the ADR screen unless it is a wrong number, as it will be permanently deleted from all ADR screens.

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## **E-mail Addresses**

E-mail addresses are similar to Cell Phone and Pager numbers in that they are not saved with any particular address record, even though they will appear and can be maintained on the ADR screen. Use the e-mail address type of (*Your defined email type here*) for the address to which the student wants e-mail sent directly from Colleague. For example, an Academic Evaluation “Eval” can be sent directly from Colleague to the e-mail address with the e-mail type of (*Your defined email type here*). If the student provides additional e-mail addresses, use the type of (*Your additional email type here*) so Colleague can determine which one to send messages to. If you delete an e-mail address from the ADR screen, it is deleted from all screens, so be careful when maintaining them.

## **Temporary/Seasonal Addresses**

When a person provides a temporary/seasonal address, enter the address into a blank ADR screen with an address type of “Temporary.” Enter the effective dates of the address and also enter the appropriate dates – a month and day - in the Seasonal Dates fields, which may or may not be the same as the effective dates. In order for this address to print on most system generated forms, such as the Statement of Charges, Colleague will check for the address when you choose a specific Name/Address Hierarchy. An example of a temporary address for a person who wishes this to be his preferred address is show below.

After saving out of ADR, this person’s ADSU screen would like similar to the one below. This person would have two “Current” addresses during the time the Temporary address is in effect.

## **Multiple People Living at the Same Address**

If more than one person with a record in Colleague lives at the same address, Colleague keeps track of this information for later use. An example is shown below where two names are listed under the “Residents” column on the ADSU screen.

If an address change is entered for one of the residents on the old address ADR screen instead of on a blank ADR screen, the ADRM screen will appear so you can change the address for the other resident as well. The address of the other resident should not be changed at the same time unless the address change information clearly indicates both individuals have moved. To leave the other resident’s address unchanged, leave the Update and History fields set to “No” and save out of ADRM.

## **Return to Sender/Unknown Address Maintenance**



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Sometimes mail will be returned by the post office with something written on the envelope that indicates that the address is no longer good and that any forwarding request has expired. In this instance, change the incorrect address status to “Last Known” on the ADR screen as shown below.

If there is not a more current address on ADSU, and all addresses are either marked as “Last Known” or “Former,” **the responsible department should attempt to obtain a valid mailing address** using telephone or e-mail addresses that may be recorded in Colleague or in the person’s file or registration records. If a correct address cannot be obtained, enter “NM – No Mail” in the Mail Codes field on the NAE record for the person.

## **Maintaining Addresses of Vendors/Organizations**

Vendor address changes and/or additional addresses for a vendor are maintained from the VEND screen. To change a current address, detail on the “Demographics” field and choose ORGP.

The Address Resolution screen appears

Choose the address to change. Type the new address over the current address, enter a “Source” for the Address Change in the lower left hand-corner of the screen and type “Y” when the box appears asking to keep address history.

To add additional addresses for a Vendor, detail on the “Demographics” field on VEND and choose ORGP. When the Address Resolution screen appears, type A at the bottom of the screen to Add an additional address.

Type the new address and designate the “Type”.

Save/update the record.

# South Dakota Colleague System Procedures

## Appendix - NAME AND ADDRESS DATA ENTRY STANDARDS

Responsibility: University

NAME AND ADDRESS DATA ENTRY STANDARDS (Adapted from *Name and Address Data Entry Standards* written by Nancy Koehler, Wittenberg University.)

The purpose of name and address data entry standards is to create some continuity between each institution and the different modules in *Colleague*. For purposes of mass mailings using mailing labels, the number of characters in the "Mail Name" Field and the "Address" field is limited to 30 characters.

- Data Entry Rules for Addresses
  - A. Do not use punctuation in any address. The postal sorting computers cannot read punctuation.
  - B. Always abbreviate the following Rural/Post Office Box Addressing:

Rural Route	RR 3 Box 10
Highway Contract Route	HC 2 Box 10
Post Office Box	PO Box 184
  - C. Specific rules on abbreviations of certain Directionals, Secondary Address Unit Indicators and Street Designators which can be used when 30 characters are exceeded:

**Directionals:**

East – E

North – N

Northeast – NE

Northwest – NW

South – S

Southeast – SE

Southwest – SW

West – W

**Secondary Address Unit Indicators:**

Apartment – Apt

Building – Bldg

Department – Dept

Floor – Fl

Room – Rm

Suite – Ste

**Street Designators (Suffixes):**

Alley – Aly

Annex – Anx

Arcade – Arc

Avenue – Ave

Bayou – Byu

Beach – Bch

Bend – Bnd

Bluff – Blf

Bottom – Btm

Boulevard –

Blvd

Branch – Br

Bridge – Brg

Brook – Brk

Burg – Bg

Bypass – Byp

Camp – Cp

Canyon – Cyn

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<u>Cape – Cpe</u>	<u>Haven – Hvn</u>	<u>Plaza – Plz</u>
<u>Causeway –</u>	<u>Heights – Hts</u>	<u>Point – Pt</u>
<u>Cswy</u>	<u>Highway – Hwy</u>	<u>Port – Prt</u>
<u>Center – Ctr</u>	<u>Hill – Hl</u>	<u>Prairie – Pr</u>
<u>Circle – Cir</u>	<u>Hills – Hls</u>	<u>Radial – Radl</u>
<u>Cliffs – Clfs</u>	<u>Hollow – Holw</u>	<u>Ranch – Rnch</u>
<u>Club – Clb</u>	<u>Inlet – Inlt</u>	<u>Rapids – Rpds</u>
<u>Corner – Cor</u>	<u>Island – Is</u>	<u>Rest – Rst</u>
<u>Corners – Cors</u>	<u>Islands – Iss</u>	<u>Ridge – Rdg</u>
<u>Course – Crse</u>	<u>Isle – Isle</u>	<u>River – Riv</u>
<u>Court – Ct</u>	<u>Junction – Jct</u>	<u>Road – Rd</u>
<u>Courts – Cts</u>	<u>Key – Ky</u>	<u>Row – Row</u>
<u>Cove – Cv</u>	<u>Knolls – Knls</u>	<u>Run – Run</u>
<u>Creek – Crk</u>	<u>Lake – Lk</u>	<u>Shoal – Shl</u>
<u>Crescent – Cres</u>	<u>Lakes – Lks</u>	<u>Shoals – Shls</u>
<u>Crossing – Xing</u>	<u>Landing – Lndg</u>	<u>Shore – Shr</u>
<u>Dale – Dl</u>	<u>Lane – Ln</u>	<u>Shores – Shrs</u>
<u>Dam – Dm</u>	<u>Light – Lgt</u>	<u>Spring – Spg</u>
<u>Divide – Dv</u>	<u>Loaf – Lf</u>	<u>Springs – Spgs</u>
<u>Drive – Dr</u>	<u>Locks – Lcks</u>	<u>Spur – Spur</u>
<u>Estates – Est</u>	<u>Lodge – Ldg</u>	<u>Square – Sq</u>
<u>Expressway –</u>	<u>Loop – Loop</u>	<u>Station – Sta</u>
<u>Epy</u>	<u>Mall – Mall</u>	<u>Stravenue – Stra</u>
<u>Extension – Ext</u>	<u>Manor – Mnr</u>	<u>Stream – Strm</u>
<u>Fall – Fall</u>	<u>Meadows –</u>	<u>Street – St</u>
<u>Falls – Fls</u>	<u>Mdws</u>	<u>Summit – Smt</u>
<u>Ferry – Fry</u>	<u>Mill – Ml</u>	<u>Terrace – Ter</u>
<u>Field – Fld</u>	<u>Mills – Mls</u>	<u>Trace – Trce</u>
<u>Fields – Flds</u>	<u>Mission – Msn</u>	<u>Track – Trak</u>
<u>Flats – Flt</u>	<u>Mount – Mt</u>	<u>Trail – Trl</u>
<u>Ford – Frd</u>	<u>Mountain – Mtn</u>	<u>Trailer – Trlr</u>
<u>Forest – Frst</u>	<u>Neck – Nck</u>	<u>Tunnel – Tunl</u>
<u>Forge – Frg</u>	<u>Orchard – Orch</u>	<u>Turnpike – Tpke</u>
<u>Fork – Frk</u>	<u>Oval – Oval</u>	<u>Union – Un</u>
<u>Forks – Frks</u>	<u>Park – Park</u>	<u>Valley – Vly</u>
<u>Fort – Ft</u>	<u>Parkway – Pky</u>	<u>Viaduct – Via</u>
<u>Freeway – Fwy</u>	<u>Pass – Pass</u>	<u>View – Vw</u>
<u>Gardens – Gdns</u>	<u>Path – Path</u>	<u>Village – Vlg</u>
<u>Gateway – Gtwy</u>	<u>Pike – Pike</u>	<u>Ville – Vl</u>
<u>Glen – Gln</u>	<u>Pines – Pnes</u>	<u>Vista – Vis</u>
<u>Green – Grn</u>	<u>Place – Pl</u>	<u>Walk – Walk</u>
<u>Grove – Grv</u>	<u>Plain – Pln</u>	<u>Way – Way</u>
<u>Harbor – Hbr</u>	<u>Plains – Plns</u>	<u>Wells – Wls</u>

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- D. When the address will not fit into 30 characters, abbreviate from right to left until it will fit. EX: 32 Kensington Expressway North Apartment 135 → 32 Kensington Expressway North Apt 135 → 32 Kensington Expressway N Apt 135 → 32 Kensington Expy N Apt 135.

\*\*NOTE: Use your best judgment when abbreviating an address. Try to avoid excessive abbreviating. Keep an address if it still looks formal and not too choppy.

- E. Always use the nine-digit zip code if available.

- Data Entry Rules for Names

“Name LFM” Field:

1. Names are to be entered into *Colleague* with the punctuation and capitalization that the prospect, applicant or student wants. There will be no artificial name standards for the sake of the computer system.
2. If only an initial is used for a legal first or middle name, do not follow the initial with a “.”. This will be done in the “Mail Name” field.
3. Prefixes will not be entered for prospect, applicant or student names.
4. Use Suffix if it is documented (Application, Name Change Request).

“Mail Name” Field:

\*\*NOTE: The only name field which should be updated to fit within 30 characters is the “Mail Name” field. This is the field from which mailing labels are generated.

The “Mail Name” field will default to PREFIX FIRST MIDDLE.INIT LAST, SUFFIX and should only be changed if it differs from that standard.

1. Always abbreviate the MIDDLE name to a middle initial UNLESS that individual goes by their middle name. In this case you abbreviate the FIRST name as a first initial and spell out the MIDDLE name in full (unless otherwise requested).
2. Always keep the LAST name intact.
3. Use Suffix whenever possible.

When the name will not fit into 30 characters, use the following:

1. The “,” between LAST and SUFFIX may be eliminated. EX: Jonathon W. Montgomery Jr.
2. The “.” after the first or middle initial may be eliminated. EX: John H Sunderland.
3. The MIDDLE.INIT can be omitted. EX: Richard Peterson, Sr.
4. The SUFFIX (and MIDDLE.INIT) can be eliminated. EX: Christopher Stevenson
5. You may need to use FIRST.INIT and MIDDLE.INIT. EX: T. D.

# South Dakota Colleague System Procedures

Reimenshneider

# South Dakota Colleague System Procedures

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## Glossary

### Address change source

APP	Common Application Form	Used when a common application is received
COR	Correction	Used when an individual made a data entry error
FAD	Fin Aid App Demographics	Used when a Fin Aid Ap is received
GEN	General Survey	Used when a General Survey is received
NEW	New Address Form	Used when a new address form is received
OBT	Obituary	Used when an obituary is received
RET	Returned Mail	Used when mail is returned for undeliverable address
VEN	Vendor Application Form	Used when a vendor ap is received
WEB	Web	Used for address changes via the web
STU	Student Provided	Used when a student provides a new address
OTH	Other	

### Address type codes

HOM	Permanent Home	HOM	1	RMA
BUS	Business	BUS	2	RMA
WEB	Web	WEB	3	RMA
COR	Correction	COR	7	RMA
ISR	ISIR Load	ISR		RMA
LOC	Local	LOC		RMA
LTP	Local Temporary	LTP		RMA

All students will have a home address unless the student refuses to provide any address information.

Used when creating an institution or an organization

Used by the web address update capability functionality. Usage will be reviewed.

Used in the case of incorrect address on an individual or organization. Use specifically for deleting addresses when the individual is deceased. Use correction only if you never want to be able to trace it. Correction Type deletes an address for a person. Not used for a change in address. In the case of deceased students, the last known home address would be entered on STRK with a type of "Ad" for administrative and a code of xLKA to indicate last known address.

Updated with the ISIR load.

Use if a local address is provided that is different than the home address. LOC or DRM is needed for all International students. International students will also have an FOR address as well.

A temporary address to be used as a local address when a student attends a university



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					other than the home institution. Use for an address that is for a limited period of time.
INS	Institution On Campus	INS		RMA	Used to record an institutional address other than the dorm. Also used for faculty members. Used to record box number if different than a dorm room.
RCV	Accounts Receivable	RCV		RMA	Enter accounts receivable address if the student designates a billing address that is different from their home address.
EME	Emergency	EME		RMA	Optional: If the student provides a name and address for the emergency contact, enter the address for the emergency contact person if other than the student's home address. Associated with EMER screen.
OTH	Other	OTH		RMA	Delivered from Datatel but not used by SD.
SEA	Seasonal	SEA		RMA	Every year the student will be residing at a certain location other than their home for a limited amount of time. There is a set beginning and end date that will occur each year.
DRM	Residence Hall	DRM		RMA	Contains the room number at the residence hall. This will be added by the system when the residence hall assignment is made.
CFD	Corporation/Foundation	CFD		RMA	Not currently used in SD.
FAM	Family	FAM		RMA	Entered as Next of Kin address. Associated with Formatted Name screen.
DIP	Diploma	DIP		RMA	Used for graduation record delivery if the address is different from the home address.
FOR	Foreign	FOR		RMA	Required for SEVIS. Used for a foreign address for all international students.

**Directory Information:**

The following data elements are listed as directory information. Directory Information does not require a written signature from the student to be released.

- Name
- Address
- Telephone listing
- E-mail address
- Photograph (to be printed in yearbook, etc)
- Date and place of birth
- Major field of study

# South Dakota Colleague System Procedures

Dates of attendance

Grade Level

Enrollment status

Participation in officially recognized activities and sports Weight and height of members of athletic teams

Degrees, honors and awards received

Most recent education agency or institution attended

If the information is not listed as directory information, it will not be released without written consent of the student.