

# HUMAN RESOURCES INFORMATION SYSTEM

SOUTH DAKOTA BOARD OF REGENTS  
HUMAN RESOURCES/FINANCE INFORMATION SYSTEMS

## Biographic/Demographic Information Procedures Manual

Version 1.7

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# Introduction

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## Overview

Welcome to the South Dakota Board of Regents Human Resource Information System. This chapter explains the Biographic and Demographic Information module in the Banner Human Resources System. The core of the Biographic and Demographic Information module is the Identification Form (PPAIDEN), which establishes a unique ID number for each employee in the system. Biographic and Demographic Information also enables the user to enter and update information about the professional qualifications of an applicant or employee. It provides forms for entry of:

- Comments, including interview results and offer stipulations,
- Educational background, including institutions attended and degrees received,
- Employment experience,
- Veteran status,
- Publications record,
- Certification information, and
- Skill descriptions.

## Intended Audience

The intended audience includes any individual using the HR Banner system.

## Documentation and Disclaimer

All information that is entered into this system must be free of discriminatory intent. All information used should be reflective of the position or work required or related information. It is the policy of the South Dakota Board of Regents to take affirmative action and to ensure that all employment practices are free of discrimination. In addition, the Board of Regents fully supports incorporation of non-discrimination and Affirmative Action rules and regulations into all of its employment practices. South Dakota Board of Regents is an equal employment opportunity employer.

## Glossary

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### Address Types

- **BI – Billing:** Used when creating a record that will be billed via SCT Banner. For Grant addresses, enter BI for Billing for agencies and agency contacts.
- **BU – Business:** Used when creating a record with a business address. For Grant addresses, enter BU for Business for agencies and agency contacts.
- **IN – Institutional On Campus:** For Finance related addresses, enter IN – institutional, for HR addresses, enter IN – Institutional. The Institutional address is utilized for the dual purpose of routing items on campus as well as to campus. This address should reflect the employee's actual working location.

For example, if the employee is an extension agent located in Buffalo, the address would be Buffalo, SD. If the employee works in the Biology Department on a campus, the address will be the particular room and building he is working in. The institutional address (address type of IN), will be structured in the following format:

Line 1: Building and Room Number

Line 2: Department/Physical Location

Line 3: Central Mailing where the Post office would mail if mailing to your campus.

Examples:

Line 1: Administration Building 301

Line 2: Payroll - Box 2201

Line 3: University Station

Line 1: Lowry Hall 106

Line 2: Computing Services

Line 3: 820 N Washington

- **MA – Mailing:** Used for postal mailing addresses such as PO Box. For HR addresses, enter MA Mailing.
- **OF – Order From**
- **PA – Parents**
- **PR – Permanent:** All users will have a permanent address unless the user refuses to provide any address information. For HR addresses, enter PR Permanent, for Finance related addresses, enter PR – permanent.
- **RT – Remit to:** Used for Invoice/Credit Memos.
- **SR – Student Refunds:** Used for the Student Refunds Interface from Colleague to Banner.
- **TE – Temporary:** XX – Reserved for TGRFEED Use Only. Not used at this time.

## Rule, Validation, Maintenance Forms

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The Biographic and Demographic Information module is supported by the following rule and validation forms. These rule and validation forms are maintained by the Board of Regents Office. Any changes to these tables must come through the Human Resource Directors team.

<b>Form Description</b>	<b>Banner Table</b>
<b>Rule Forms</b>	
Certification Code	PTRCERT
Ethnic Code	PTRETHN
Exam Code	PTREXAM
Skill Code	PTRSKIL
Skill Level	PTRSKLV
<b>Validation Forms</b>	
Chart of Accounts Code	FTVCOAS
Organization Code	FTVORGN
E-mail Address Type Code	GTVEMAL
Letter Code	GTVLETR
Name Type Code	GTVNTYP
System Indicator	GTVSYSI
Zip/Postal Code	GTVZIPC
Comment Code	PTVCMTY
EEO Ethnic Code	PTVEEOC
Endorsement Code	PTVENDS
License/Certification Status	PTVLCSV
Validation	
Publication Code	PTVPUBT
Address Type Code	STVATYP
Citizen Type Code	STVCITZ
County Code	STVCNTY
Degree Code	STVDEGC
Degree Level Code	STVDLEV
Ethnic Codes	STVETHN
Initials Code	STVINIT
Language Code	STVLANG
Major/Minor/Concentration Code	STVMAJR
Medical Code	STVMEDI
Martial Status Code	STVMRTL
Nation Code	STVNATN
Port of Entry Code	STVPENT
Relation Code	STVRELT

Source/Background Institution Code	STVSBGI
State/Province Code	STVSTAT
Telephone Type	STVTELE
Visa Type Code	STVVVYP

### Rule Form Descriptions

**PTRCERT** - The Certification Code Rule Form enables the user to define a certification code, describe the associated certification, and tell the system whether it should require the certification date. The codes defined on this form are entered at the Certification Code field on the Certification Information Form (PPACERT).

**PTRETHN** - The Ethnic Codes Rule Form enables the user to define in-house ethnic codes and link them with ethnic categories specified by the federal government for use in Equal Employment Opportunity (EEO) and IPEDS reporting.

### Validation Form Descriptions

**FTVCOAS** - Use the Chart of Accounts Validation Form to view the charts of accounts defined to the system. Access this form from the Chart of Accounts Maintenance Query Menu (\*FINCHRTQ).

**FTVORGN** - Use the Organization Code Validation Form - Finance to view the organization codes defined to the system. Access this form from the Chart of Accounts Maintenance Query Menu (\*FINCHRTQ).

**GTVEMAL** - Use this form to define valid e-mail address type codes. Examples of e-mail address types include business and school. These codes are used on the E-mail Address Form (GOAEMAL) to enter e-mail address information for individuals.

**GTVNTYP** - Use this form to define codes for name types that can be associated with ID names. Examples of name types include maiden, nickname, and legal. These codes can be used for correspondence and reporting.

**GTVSYSI** - Use this form to display codes that identify the various Banner systems used at the user's institution. Examples of systems include Human Resources, Student, and Finance.

**GTVZIPC** - Use this form to identify ZIP codes and postal codes used throughout Banner. The user can assign ZIP/postal codes to: Sites on the Site Code Validation Form (STVSITE), Buildings on the Building Definition Form (SLABLDG), Recruits on the Quick Recruit Form (SRAQUIK), and Donors on the Gift Form (AGAGIFT). Defining ZIP/postal codes on this form can help the user enter addresses in Banner more accurately. If the user is on an application form and selects a ZIP/postal code from a List of Values, address data from GTVZIPC automatically appears in the associated fields on the form.

PTVEEOC - The EEO Ethnic Code Validation Form lists the ethnic categories specified by the U.S. federal government for use in Equal Employment Opportunity (EEO) and IPEDS reporting. The codes defined on this form are entered on the Identification Form (PPAIDEN).

PTVENDS - The Endorsement Code Validation Form enables the user to define endorsement codes for use in specifying certifying agencies on the Certification Information Form (PPACERT).

STVATYP - Use this form to create, update, insert, and delete address type codes, such as Billing, Permanent, or Mailing.

STVCITZ - The user use this form to create, update, insert, and delete citizen type codes (i.e., Canadian Citizen, Student Visa, etc.). This form is used by the General Person Form (SPAPERS) to validate the citizen type codes.

STVCNTY - The user use this form to create, update, insert, and delete county codes such as Delaware, Polk, or Missoula. This form is used by forms in several modules to validate the county codes.

STVDEGC - The user use this form to maintain the degree codes (Undeclared, Bachelor of Arts, Doctor of Education, etc.). This form is used by other forms to validate the degree codes.

STVDLEV - The user use this form to create, update, insert, and delete degree level codes (Associate, Bachelor, Master, etc.). Other forms use this form to validate the degree level codes.

STVETHN - This form is used to create, update, insert, and delete ethnic codes (Caucasian, Chinese, Cuban, etc.). This form is used by other forms to validate ethnic codes.

STVINIT - The user use this form to create, update, insert, and delete recruiting information. This form is used by the Material Form (SOAMATL) and the Letter Generation process to validate this information.

STVLANG - This form is used to create, update, insert, and delete language codes. These codes may refer to languages such as Chinese, English, or Spanish. This form is used by other forms to validate language codes.

STVMAJR - The user use this form to create, update, insert, and delete major, minor, and concentration codes (i.e., Undeclared, Journalism, Music, Law, etc.). Forms in several modules use this form to validate the major, minor, and concentration codes.

STVMRTL - The user use this form to create, update, insert, and delete marital status codes (i.e., Married, Single, Widowed, etc.). The General Person Form (SPAPERS) uses this form to validate the marital status codes.

STVNATN - The user use this form to create, update, insert, and delete nation codes (i.e., Australia, France, Iceland, etc.). Forms in several modules use this form to validate the nation codes.

STVPENT - The user use this form to create, update, insert, and delete port of entry codes such as Miami Port Authority, New York City Port Authority, San Francisco Port Authority, etc. The International Information Form (GOAINTL) uses this form to validate the port of entry codes.

STVRELT - The user use this form to create, update, insert, and delete relation codes (i.e., Brother, Mother, Spouse, etc.). The Emergency Contact Form (SPAEMRG) and the Guardian Information Form (SOAFOLK) use this form to validate the relation codes.

STVSBGI - The user use this form to create, update, insert, and delete source/background institution codes (i.e., Harvard University, Yale University, Bryn Mawr College, etc.). Several forms in the Recruiting, Academic History, and Admissions modules use this form to validate the source/background institution codes.

STVSTAT - The user use this form to create, update, insert, and delete state and province codes (i.e., Delaware, British Columbia, New South Wales, etc.). Forms in several modules use this form to validate the state and province codes.

STVTELE - The user use this form to create, update, insert, and delete telephone types such as Car, Residence Hall, Business, etc. Several forms in various modules use this form to validate telephone types.

STVVVTYP - The user use this form to create, update, insert, and delete visa type codes (i.e., Tourist, Student Visa, Exchange Scholar, etc.). The International Information Form (GOAINTL) uses this form to validate the visa type codes.

For more information on how to set up these forms, go to the Other Information Section.



## Business Process

### A. Demographic Data Application Forms

This section covers the forms that are used to establish all basic bio/demo data in Banner HR.

#### 1. The Identification Form (PPAIDEN) – General Person Form

The screenshot shows the Oracle Developer Forms Runtime interface for the PPAIDEN form. The title bar reads "Oracle Developer Forms Runtime - Web: Open > PPAIDEN". The menu bar includes "File", "Edit", "Options", "Block", "Item", "Record", "Query", "Tools", and "Help". The toolbar contains various icons for navigation and editing. The main form area is titled "Identification PPAIDEN 8.0 (TEST)".

At the top, there is an "ID:" field with the value "A00106227" and a "Name:" field with the value "Jonathon Lee James". A "Generate ID:" button is located to the right. Below this, there are several tabs: "Current Identification", "Alternate Identification", "Address", "Telephone", "Biographical", "E-mail", "Emergency Contact", and "Additional Identification".

The "Current Identification" tab is active, showing the following fields:

- ID: A00106227
- Name Type: [dropdown]
- SSN/SIN/TIN: 897456232

The form is divided into two main sections: "Person" and "Non-Person".

**Person Section:**

- Last Name: James
- First Name: Jonathon
- Middle Name: Lee
- Prefix: [empty]
- Suffix: [empty]
- Preferred First Name: [empty]
- Full Legal Name: [empty]
- Marital Status: [dropdown]

**Non-Person Section:**

- Name: [empty]

**ID and Name Source Section:**

- Last Update
- User: WWW2\_USER
- Activity Date: 12-JAN-2010
- Origin: [empty]

**Original Creation Section:**

- User: WWW2\_USER
- Create Date: 12-JAN-2010

At the bottom of the form, there is a status bar with the text "Current identification number, overtyping to change." and "Record: 1/1".

\*\* This is an example with a FAKE person – made up for the purpose of training.

#### Required fields

The following fields are required in PPAIDEN when a person is being defined as an employee:

- Birth Date,
- First Name,
- Last Name,
- SSN/SIN/TIN,
- Address, and
- Gender.

Note: Some fields on PPAIDEN are optional, and sometimes entire windows are optional.

For entering a new hire, please see the Employment Compensation Manual (PEAEMPL and NBAJOBS).

### **Tab One: Current Identification Information**

This tab will provide the employees current identification. The user can add the employee's full legal name. In the Identification Tab, the Social Security Name must be used with the Name Type of Null (blank) and the Change Indicator of Null (blank). **This will ensure that all W2 Processing will pull the most active Name Type (Null) and Change Type (Null).**

### **Tab Two: Alternate Identification Information**

In the event an employee's identification changes or is modified, the Alternate Identification tab is used to enter an alternate name for a person. This is helpful when the user need to record name changes associated with personal life changes. Note: The user can enter multiple alternative identifications for a person but the user cannot delete an alternative identification once it is saved in SCT Banner.

Follow the steps below to enter alternate identification information.

- a. Access the Alternate Identification tab.
- b. Select the change type code from the Change Type drop-down list.
- c. Select the name type code from the Name Type drop-down list.
- d. Enter an alternate name for the person, such as a maiden name, in the Last Name field.
- e. Enter the person's first name in the First Name field.
- f. Optional - enter the person's middle name in the Middle Name field.
- g. Click the Save icon. When an employee changes his/her name on PPAIDEN, the alternate name field will be populated automatically in SCT Banner.
- h. Select another tab to continue adding information or Click the Exit icon.

Note: All alternative names (i.e., anything but the SSN name) must have a name type and a change indicator that is not Null.

### **Tab Three: Address Information**

The Address Information tab allows the user to enter or update an address. The user can add details such as delivery points or carrier routes. Addresses are required for employees. Some persons may have more than one address, such as a Mailing address and a Business address. These are referred to as Address Types. It is important that each address be entered with the appropriate Address Type. The user can add multiple addresses or see an address history by clicking the Address Type list and selecting Addresses (PPIADDR).

Employees should be established with the following address types: Institutional, Mailing,

and Permanent. For purpose of reporting, County and City must be completed on all address types.

Line 1: Building and Room Number

Line 2: Department/Physical Location

Line 3: Central Mailing where the Post office would mail if mailing to your campus.

Examples:

Line 1: Administration Building 301

Line 2: Payroll - Box 2201

Line 3: University Station

Line 1: Lowry Hall 106

Line 2: Computing Services

Line 3: 820 N Washington

Eff Oct 2, 2006, the Student institutional address (address type of IN), would be structured in the following format:

Line 1: Department/Physical Location

City, County & State populated (required)

No E-mail address populated

- a. Institutional Address (IN) is utilized for the dual purpose of routing items on campus as well as to campus. This address should reflect the employee's actual working location. For example, if the employee is an extension agent located in Buffalo, the address would be Buffalo, SD. If the employee works in the Biology Department on a campus, the address will be the particular room and building he is working in.
- b. Permanent Address (PR) is utilized for the employee's permanent address.
- c. Mailing Address (MA) is utilized for an employee if they have a mailing address with no street address such as PO Box.

#### **Tab Four: Telephone Information**

The Telephone tab allows the user to add details regarding a person's phone number and add comments. It automatically records the activity date when the user save the record.

Follow the steps below to enter current identification information.

- a. Access the Identification Form (PPAIDEN).
- b. Select Insert from the Record Option on the tool bar.
- c. Double-click the Telephone Type field and select a telephone type.
- d. Enter the employee's phone number in the Telephone field.
- e. Click the Primary checkbox if this is the person's primary phone number.
- f. Click the Save icon.

- g. Select another tab to continue adding information or Click the Exit icon.

### Tab Five: Biographical Information

The Biographical tab on the Identification Form (PPAIDEN) is used to enter biographic and demographic information for an employee. Many of the fields such as, Date of Birth, Gender, and Citizenship are required for IPEDS reporting.

In order to be an employee, the following fields are required: Date of Birth, Citizenship, Gender, Ethnicity, and Social Security Number. This is necessary to get SNAP set up. Individuals should not place in the system false birth dates. A process should be in place to establish or receive the birth date upon recruitment.

The user can select the Confidential option to mark this information as confidential. This tab is also to record an employee's death. Confidential option only provides a pop up box that documents to the reviewer this information is confidential. It is not mandatory as we have high levels of security established.

Oracle Developer Forms Runtime - Web: Open > PPAIDEN

File Edit Options Block Item Record Query Tools Help

Identification PPAIDEN 8.0 (TEST)

ID: A00106227 Jonathon Lee James Generate ID: [Icon]

Current Identification Alternate Identification Address Telephone **Biographical** E-mail Emergency Contact Additional Identification

Gender:  Male  Female  Not Available  
 Birth Date: 03-JAN-1982 [Calendar]  Confidential  
 Age: 28  Deceased  
 SSN/SIN/TIN: 897456232 Deceased Date: [Calendar]

Citizenship: US [Dropdown] US Citizen Veteran File Number: [Text]  
 Marital Status: [Dropdown] Veteran Category: None [Dropdown]  
 Religion: [Dropdown] Active Duty Separation Date: [Calendar]  Special Disabled Veteran  
 Legacy: [Dropdown]  
 Ethnicity: WH [Dropdown] White  
 New Ethnicity: None [Dropdown]  
 Ethnicity and Race Confirmed  
 Confirmed Date: 14-JAN-2010 [Calendar]

Last Update  
 User: JKMINDER [Text]  
 Activity Date: 14-JAN-2010 [Text]

Race	User	Activity Date
WH White	JKMINDER	14-JAN-2010
[Empty]	[Empty]	[Empty]
[Empty]	[Empty]	[Empty]

FRM-40400: Transaction complete: 2 records applied and saved.  
 Record: 1/1 | ... | <OSC>

\*\* This is an example with a FAKE person – made up for the purpose of training.

Follow these steps to add or update biographical information.

- a. Access the Biographical tab.
- b. Optional - Click the Confidential checkbox to mark this information as confidential. The Confidentiality Indicator field is for reporting purposes only. If it is checked, it is displayed on the Letter Generation window. It has no effect on Web for Employees data.
- c. Do not check the Deceased field. If the employee is deceased, the Date field should also be entered with the date of death. The employee's age at the time of death is calculated by the system. This field populates the Deceased box on the W2 report.
- d. Add or edit the gender, birth date, and SSN/SIN/TIN information, if needed. The person's age will be automatically calculated. If the user has already entered this information when the user generated a new person record in PPAIDEN, the information will appear on this tab. The user can edit this information here. The gender of an employee cannot be *Unavailable*.
- e. Double-click the Citizenship field and select a Citizen Type code.
- f. Double-click the Ethnicity field and select an Ethnic Code. This cannot be Unknown. Unknown was provided during the transition from PayPerS to Banner but will not be available long-term. In accordance with federal reporting, unknown is not allowable. Banner added the RACE block. This should be populated once the Ethnicity can be confirmed either by the employee voluntary submission or through visual review of Employer.
- g. Double-click the Marital Status field and select a Marital Status code. This is a field that will be necessary for reporting to SDRS and BOP.
- h. The Religion field will not be used by SDBOR.
- i. Optional – double-click the Legacy field and select a Legacy code. This code is normally used for Alumni purposes; however, Human Resources could use it to identify any relatives working at the institution.
- j. Veteran's Status - Enter the file number in the Veteran File Number field, if the person is a veteran. Double-click the Veteran Category field and select a valid code if the person is a veteran. Check the Special Disabled Veteran field if the person is a veteran and disabled. A special disabled veteran is either of the following: A veteran who is entitled to compensation (or who would be but for the receipt of military retired pay) under laws administered by the Department of Veteran Affairs for a disability (i) rated at 30% or more, or (ii) rated at 10 or 20% in the case of a veteran who has been determined under Section 1506 of Title 38, who has been determined under Section 1506 of Title 38, U.S, to have a serious employment handicap. A veteran who was discharged or released from active duty because of a service-connected disability. Enter the date on which the individual separated or was discharged from active military duty in the Active Duty Separation Date field. This date is used to classify veterans under the *newly separated veterans' category* on the VETS-100 reports whose active duty separation date falls within the VETS reporting period.
- k. Click the Save icon.
- l. Select another tab to continue adding information or Click the Exit icon.

### **Tab Six: E-mail Information**

The E-mail tab allows the user to add details regarding a person's e-mail information and add comments. It automatically records the activity date when the user save the record.

Follow the steps below to enter e-mail information.

- a. Click the E-mail tab.
- b. Select Insert from the Record Option on the tool bar.
- c. Select an E-mail type in the E-mail Type field.
- d. Enter the employee's e-mail address in the E-mail address field.
- e. Click the Preferred checkbox if this is the person's preferred e-mail address.
- f. Click the Save icon.
- g. Select another tab to continue adding information or Click the Exit icon.

### **Tab Seven: Enter Emergency Contact Information**

The Emergency Contact tab on the Identification Form (PPAIDEN) is used to enter Emergency Contact Information for a person/employee. The Emergency Contact information is required for SDBOR employees for purposes of emergency contact. SDBOR requires two contacts to be entered. The Name and Priority fields are required. The Emergency Contact list may be prioritized according to the order in which the contacts should be notified of an emergency. Emergency Contact information can be accessed from the Web.

It is recommended that upon hire, the employee be requested to go out to SSB and enter Emergency Contact Information. In the event this is not possible, then HR or SuperUser can access this tab and enter the data.

Follow these steps to enter emergency contact information.

- a. Access the Emergency Contact tab.
- b. (If an emergency contact exists, select insert from the Records Option on the tool bar).
- c. Enter a number in the Priority field to specify the order of contact priority. When adding others, add the change with the next available priority number, save, then go back and renumber without saving until the user have changed all that is needed.
- d. Enter the contact person's last name in the Contact Last Name field.
- e. Enter the contact person's first name in the First field.
- f. Optional - enter the contact person's middle initial in the MI field.
- g. Double-click the Relationship field and select and return a Relationship code.
- h. Select the Search button at the Address Type field and return *EM* (Emergency Contact) from the Address Type Validation form.
- i. Enter the contact person's address in the Address field. Enter at least one address.
- j. Enter the contact person's city in the City field.
- k. Double-click the State/Province field and select and return a State/Province code.
- l. Enter the contact person's zip code in the ZIP/Postal Code field.
- m. Optional- Double-click the Nation field and select a Nation code.
- n. Enter the contact person's phone number in the Phone field.
- o. Click the Save icon.

## Tab Seven: Additional Information

This is a new tab in PPAIDEN and currently is not being utilized. This tab will allow BOR to track additional information on ID's that exist.

To exit from PPAIDEN select the X on the right corner of the form.

## 2. General Information Form (PPAGENL)

The General Information Form (PPAGENL) captures an employee's general qualifications normally submitted by an applicant, including education, experience, examination results, and publications. The user can easily access this form using the Options menu on the Person Identification form (PPAIDEN) or they can go to the general menu to select or type in PPAGENL.

Note: This information is not a part of the hiring process and will need to be populated once the employee is in the system.

The screenshot shows the Oracle Developer Forms Runtime window for the PPAGENL form. The window title is "Oracle Developer Forms Runtime - Web: Open > PPAGENL". The menu bar includes "File", "Edit", "Options", "Block", "Item", "Record", "Query", "Tools", and "Help". The toolbar contains various icons for navigation and editing. The form itself is titled "General Information PPAGENL 8.0 (TEST)". It features a header with the ID "A00106227" and the name "Jonathon Lee James". Below this are several tabs: "General Education", "Examinations", "Publications", "Driver's License", "Honors and Awards", and "Transcript". The "General Education" tab is active. The form is divided into several sections: "Institution" with "SBGI Code" (0020) and "Comm Col American Samoa"; "Diploma or Degree" with fields for "Degree" (AA), "Associate of Arts", "GPA", "Hours", "Level" (A), "Associate", "First Attended Date", "Last Attended Date", "Graduation Date" (31-MAY-2002), and a "Terminal Degree" checkbox; "Major" and "Minor" sections with dropdown menus and input fields; and "Area of Concentration" with a dropdown menu and input fields. The status bar at the bottom displays "FRM-40400: Transaction complete: 1 records applied and saved." and "Record: 1/1".

\*\* This is an example with a FAKE person – made up for the purpose of training.

### **Tab One: General Education**

Follow these steps to enter general information.

- a. Access the General Information Form (PPAGENL).
- b. Enter the employees's ID in the ID field or perform a Search by using the wildcard (% and their initial) or search by last or first name.
- c. Once the search provides information, double click on the name you were searching.
- d. Perform a Next Block function.
- e. Select the Search function in the SBGI Code field and select the person's Institution. The SBGI code is user-defined and enables the user to identify educational institutions.
- f. Click the Save icon.
- g. Perform a Next Block function.
- h. Double-click the Degree Code field and select the appropriate Degree Code.
- i. Enter the person's Grade Point Average in the GPA field (not required and optional).
- j. If necessary, enter the number of hours in the Hours field (not required and optional).
- k. Enter the dates that the person attended the institution in the Dates of Attendance fields (not required and optional).
- l. Enter the person's graduation date in the Date of Graduation field – This is a highly preferred field to be populated for various validation reports for SDBOR.
- m. Click the Terminal Degree checkbox if it is a terminal degree in the employee's discipline (Required field). When the user checks the Terminal Degree field, this information will display in Faculty Tracking (PEAFACT). Terminal Degree should only be checked if the employee is teaching in the field of the degree itself.
- n. Use the down arrow to enter more degree information if this employee has multiple degrees with this institution.
- o. Click the Save icon.
- p. Perform a Next Block function.
- q. Double-click the Major field and select and return a Major, Minor, Concentration code.
- r. Double-click the Minor field and select and return a Major, Minor, Concentration code.
- s. Double-click the Concentration field and select and return a Major, Minor, Concentration code.
- t. Click the Save icon.

### **Tab Two: Examinations Tab**

The Examinations Option is used to capture information about formal exams for minimum qualifications such as a CPA, State Bar, Medical licenses, and any other professional certification or licensing exams. It may also be used for an institution's internal exams. The examination codes are entered on the Exam Code Rules Form (PTREXAM). Currently, SDBOR is not using this tab. The rule forms have not been established.

Follow these steps to enter examination information.

- a. Select the Examination tab.
- b. Select the Search function in the Examination Code field and select a valid Examination code.
- c. Enter the date of the exam in the Exam Date field.
- d. Enter the test score in the Score field.



- e. Enter the test score percentage in the Percent field.
- f. In the Pass Field, *Pass* or *Fail* is defaulted but can be overridden.
- g. Click the Save icon.

### **Tab Three: Publications Tab**

The Publication tab is used to enter faculty publications. Extender will be used for a majority of the publication information. This is where a document will be attached rather than manually entering in all of the optional information. Currently, SDBOR is not using this tab. The rule forms have not been established.

Follow these steps to enter publication information.

- a. Select the Publication tab.
- b. Double-click the Type field and select a Publication Code.
- c. Enter the title of the published work in the Title field.
- d. Enter the name of the publisher in the Publisher field.
- e. Enter the Issue name in the Publication Issue field.
- f. Enter the Volume name in the Publication Volume field.
- g. Enter the pages numbers of the publication in the Pages field.
- h. Enter the date in the Publication Date field.
- i. Click the Save icon.

### **Tab Four: Driver's License Tab**

This tab will be mandatory for those positions that require proof of a valid driver's license.

Follow these steps to enter driver's license information.

- a. Select the Driver's License tab.
- b. Select insert from the Records Option on the tool bar.
- c. Enter the Driver's License Number (up to 20 characters) in the License Number field.
- d. Optional - double-click in the Type field, and select a Skill code.
- e. Select a status code from the drop-down menu in the Status field. SCT Banner defaults to C-Current but the user can also select among the following status options: E-Expired, S-Suspended, I-In Process.
- f. Enter the date the license became effective in the Issue Date field.
- g. Enter the date the license expires in the Expiration Date field.
- h. Double-click the State/Province field and select and return a State/Providence code.
- i. Double-click in the Nation field and select and return a Nation code.
- j. Click the Save icon.

### **Tab Five: Honors and Awards Tab**

This is an optional tab for the institutions to determine if viable for their record keeping.

Follow these steps to enter honor and award information.

- a. Select the Honors and Awards tab.
- b. Enter a title to describe the honors and award given in the Honors/Award Title field.

- c. Enter the organization that gave the award in the Awarding Organization field.
- d. Enter the date the award was issued in the Date Awarded field.
- e. Optional - enter the date the award expires in the Date Expired field.
- f. Click the Save icon.

### **Tab Six: Transcript Tab**

This is an optional tab but allows the institutions to record any required transcripts.

Follow these steps to enter transcript information.

- a. Select the Transcript tab.
- b. Click the Official Transcript box if this is an official transcript.
- c. Enter the date that the transcript was received in the Date of Receipt field.
- d. Enter the date that the transcript was reviewed in the Date of Review field.
- e. Click the Save icon.
- f. Click the Exit icon.

### **3. Skills Information (PPASKIL)**

The Person Skills Form (PPASKIL) maintains information about the skill and level of expertise of a specified applicant or employee. Skill information is populated on the PTRSKIL rule form and PTRSKLV rule form. This application will allow documentation of employee professional growth and continuing education. If desired, the end user could scan the document and place into Extender or the use of PPASKIL can be used. Currently, SDBOR is not using this tab. The rule forms have not been established.

Follow these steps to enter skill information.

- a. Access the Person Skills Form (PPASKIL).
- b. Enter the employee's ID in the ID field or perform a search to find the ID.
- c. Perform a Next Block function.
- d. Click the List icon in the Skill field and select a skill code.
- e. Click the List icon in the Level field and select a level.
- f. Enter the date that the person started this skill in the Start Date field.
- g. Enter the date that the employee stopped using this skill in the End Date field.
- h. Enter the date that the employee last used this skill in the Last Used field.
- i. Click the Read, Write, Speak, Translate, Teach, and/or Native Lang check box(es) if the employee's skill is a language.
- j. Enter any additional information regarding this skill in the Comments field.
- k. Click the Save icon.
- l. Click the Exit icon.

#### 4. Certification Information (PPACERT)

\*\* This is an example with a FAKE person – made up for the purpose of training.

The Certification Information Form (PPACERT) collects data on employee certifications and endorsements. The certification codes are pulled from PTRCERT. The user can also use this form to track both formal certifications and completion of internal education programs. The Pending Action Report will list upcoming expirations of these certifications. The use of Extender may be used to scan in the document for reference.

Follow these steps to enter certificate information.

- a. Access the Certification Information Form (PPACERT).
- b. Enter the employee's ID in the ID field or perform a search.
- c. Perform a Next Block function.
- d. Select the Search function in the Certification Code field and select a code from the Certification Code Rule Form (PTRCERT).
- e. Enter the license/certification number in the Certification Number field.
- f. Enter the date that the employee was certified in the Certification Date field.

- g. Enter the next date that the employee will be certified in the Next Certification Date field.
- h. Enter the date that the certification will expire in the Expire Date field.
- i. License/Certification Status Validation Form (PTVLCVS) will not be used for SDBOR.
- j. Double-click in the State/Province field and select and return the issuing State code from the State/Province Code Validation Form (STVSTAT).
- k. Double-click in the Nation/Country field and select and return the issuing Nation code from the Nation Validation Form (STVNATN).
- l. Perform a Next Block function.
- m. Double-click the Endorsements Code field and select and return an Endorsement code.
- n. Enter the date of the endorsement in the Endorsement Date field.
- o. Click the Save icon.

## 5. Person Experience Information (PPAEXPR)

The Person Experience Form (PPAEXPR) maintains records on an employee's past STATE related experience and references. This is defined to validate past state experience for vesting purposes of longevity (Adjusted Service Date).

Oracle Developer Forms Runtime - Web: Open > PPAEXPR

File Edit Options Block Item Record Query Tools Help

Person Experience PPAEXPR 8.0 (TEST)

ID: A00106227 Jonathon Lee James

**Experience**

Employer Name: State of South Dakota State or Province: SD Nation: US

Start Date: 01-DEC-2002 End Date: 31-JUL-2008

Employer Experience Type: Reason for Leaving: Other employment.

**Job Duties**

Job Title: Job Duties: Number of Employees Supervised:

**Supervisor**

Name: Telephone: Area: Extension:  OK to Contact

**Salary**

Current or Ending Salary: Current or Ending Rate: Comments:

Title for the position held.  
Record: 1/1 | ... | <OSC>

\*\* This is an example with a FAKE person – made up for the purpose of training.

Follow these steps to enter person experience information. – Optional

- a. Access the Person Experience Form (PPAEXPR).
- b. Enter the employee's ID in the ID field or perform a search.
- c. Perform a Next Block function.
- d. Enter data in the following fields within the Experience Information section: Employer Name, State/Prov, Nation, Start Date, End, Empr/Exp Type (perform a search to view the List of Values), and Reason for Leaving.
- e. Enter data in the following fields within the Job Duties section: Job Title, Job Duties, and # of Employees Supervised.
- f. Enter data in the following fields within the Supervisory Information section: Name, Phone Number, OK to Contact.
- g. Enter data in the following fields within the Salary Information section: Current Ending Salary, Current Ending Rate, Comments.
- h. Click the Save icon.

Options – Applicant's Reference-The On-line Employment system will house much of the reference information; however, if desired end users may add into the system.

#### **6. Medical Information (GOAMEDI) – Not currently used for SDBOR.**

The General Medical Information Form (GOAMEDI) enables the user to enter medical information about an applicant or employee.

Note: This section contains highly sensitive information and only certain applicable users will be able to access.

Follow these steps to enter medical information.

- a. Access the General Medical Information Form (GOAMEDI).
- b. Enter the employee's ID in the ID field or perform a Search.
- c. Perform a Next Block function.
- d. Double-click the Medical Code field and select and return a medical code.
- e. Double-click in the Disability Type field and select a disability type.
- f. Enter the age that the person was diagnosed with the disability in the Disability Onset Age field.
- g. Click the Primary Disability? checkbox if this is a primary disability.
- h. Double-click the Equipment Code field and select and return a medical equipment code.
- i. Double-click in the Disability Service field and select a code.
- j. Enter a free-form comment in the Comment field (up to sixty characters).
- k. Click the Save icon.
- l. Click the Exit icon.

#### **7. International Information (GOAINTL)**

The Visa International Information Form (GOAINTL) allows the user to enter visa and nationality data for citizens of countries.

Oracle Developer Forms Runtime - Web: Open > GOAINTL

File Edit Options Block Item Record Query Tools Help

International Information GOAINTL 8.0 (TEST)

ID: A00106227 Jonathon Lee James

Visa Passport Certification of Eligibility Nationality

**Visa Information**

Sequence Number: 1

Visa Type: A2 Other Govt Office & Family

Visa Number: 258412326

Nation of Issue: US United States of America

Issuing Authority: USDOS US Department of State

Port of Entry: SSB Seattle Seaport

Number of Entries:  Entry

Date Requested:

Date Issued:

Start Date:

End Date:

**Document Information**

Document	Description	Source	Description	Date Requested	Disposition	Date Received
PASS	Passport	USCIS	US Citizenship Immigration Ser.	14-JAN-2010	Accepted	14-JAN-2010
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

FRM-40400: Transaction complete: 1 records applied and saved.

Record: 1/1 ... List of Valu... <OSC>

\*\* This is an example with a FAKE person – made up for the purpose of training.

### Tab One: Visa

Follow these steps to enter visa information.

1. Access the Visa International Information Form (GOAINTL).
2. Enter the employee's ID in the ID field or perform a Search.
3. Perform a Next Block function.
4. Double-click in the Visa Type Code field and select the valid Visa Type.
5. Enter the Visa number in the Visa Number field.
6. Double-click in the Nation of Issue field and select the appropriate country.
7. Double-click in the Issuing Authority field and select the appropriate authority.
8. Double-click in the Port of Entry field and select the appropriate port of entry.
9. Perform a Next Block function.
10. Double-click in the Document field, and select the appropriate document.
11. Double-click in the Source field and select the appropriate source.
12. Click the Save icon.

### Tab Two: Passport

Follow these steps to enter passport information.

- a. Select the Passport tab.

- b. Enter the Passport number in the Number field.
- c. Double-click in the Nation of Issue field and select the country.
- d. Enter the date that the passport will expire in the Expiration Date field.
- e. Enter a three-character code denoting the status in the Status field.
- f. Enter the expiration date of the admission/departure in the Expiration Date field.
- g. Enter the registration number in the Alien Registration Number field.
- h. Click the Duration of Stay checkbox if the visa is for the duration of the stay.
- i. Click the Save icon.

### **Tab Three: Certification of Eligibility**

Follow these steps to enter certification information.

- a. Select the Certification of Eligibility tab.
- b. Double-click in the Certification Code field and select the appropriate certification of eligibility code.
- c. Enter the certification number in the Number field.
- d. Enter the date that the certification was issued in the Issue Date field.
- e. Enter the date that the certification was received in the Receipt Date field.
- f. Double-click in the Admission Request field and select the appropriate admission request code.
- g. Click the Save icon.

### **Tab Four: Nationality**

Follow these steps to enter nationality information.

- a. Select the Nationality tab.
- b. Double-click in the Nation of Birth field and select the country where the person was born.
- c. Double-click in the Nation of Citizenship field and select the country where the person is a citizen.
- d. Double-click in the Native Language field and select the person's native language.
- e. Double-click in the Sponsor field and select the sponsoring organization.
- f. Double-click in the Employment Type field and select the type of employment.
- g. Enter the foreign tax ID number in the Foreign Tax ID field.
- h. Select Not Reported, Yes, or No from the drop-down list in the Spouse Accompany Person to County field.
- i. Enter the number of children that are accompanying the person in the Number of Children Accompanying Person field.
- j. Select Not Reported, Yes, or No from the drop-down list in the Signature of Availability of Funds field.
- k. Click the Save icon.
- l. Click the Exit icon.

## 8. E-Mail Information (GOAEMAL)

The E-mail Address Form (GOAEMAL) displays and maintains e-mail addresses for any person who has an ID in the database. Employees can access their information from this form online when using the Employees Self Service product.

Oracle Developer Forms Runtime - Web: Open > GOAEMAL

File Edit Options Block Item Record Query Tools Help

E-mail Address GOAEMAL 8.0 (TEST)

ID: A00106227 Jonathon Lee James

E-mail

E-mail Type: PRI Primary/University Assigned

E-mail Address: jonathon.james@sdbor.edu

Preferred  Inactivate  Display on Web  URL

Comment: Activity Date: 14-JAN-2010 User: JKMINDER

E-mail Type: E-mail Address:  Preferred  Inactivate  Display on Web  URL

Comment: Activity Date: User:

E-mail Type: E-mail Address:  Preferred  Inactivate  Display on Web  URL

Comment: Activity Date: User:

E-mail Type; LIST for available types.

Record: 2/2 ... List of Valu... | <OSC>

\*\* This is an example with a FAKE person – made up for the purpose of training.

Note: The user can enter a person's e-mail address on PPAIDEN when the user sets them up initially. This form is useful when the user need to update an e-mail address. The email in the system shall be the institutional email address only – unless the terminated employee needs access to the pay stub.

Follow these steps to enter e-mail address information.

- Access the E-mail Address Form (GOAEMAL).
- Enter the employee's ID in the ID field or perform a search.
- Perform a Next Block function.
- Double-click the E-mail Type field and select and return an E-mail Type code.
- Enter the person's email address in the E-mail Address field.



- f. Check the Preferred checkbox if this is the person's preferred e-mail address. Only one e-mail address can be selected as preferred. If a preferred address becomes inactive, the preferred status is removed.
- g. Tab over the Inactive field.
- h. Click the Display on Web checkbox if the users want the employee's e-mail address to appear on the web.
- i. Enter any comments about this e-mail address in the Comments field.
- j. Click the Save icon.

## 9. Enter Correspondence Information

The Mail Form (PUAMAIL) displays and maintains correspondence records. Currently, SDBOR does not use the banner related form, rather SDBOR has developed processes through Oracle or BI Publisher to email letters and correspondence.

Oracle Developer Forms Runtime - Web: Open > PUAMAIL

File Edit Options Block Item Record Query Tools Help

Mail PUAMAIL 8.0 (TEST)

ID: A00106227 Jonathon Lee James

System: [ ]  
Letter: [ ]  
Initiation Date: [ ]  
Generation Date: [ ]  
User: [ ]

Signer's Initials: [ ]  
Wait: [ ]  
Originator: [ ]

Published  
 Generated

System: [ ]  
Letter: [ ]  
Initiation Date: [ ]  
Generation Date: [ ]  
User: [ ]

Signer's Initials: [ ]  
Wait: [ ]  
Originator: [ ]

Published  
 Generated

System: [ ]  
Letter: [ ]  
Initiation Date: [ ]  
Generation Date: [ ]  
User: [ ]

Signer's Initials: [ ]  
Wait: [ ]  
Originator: [ ]

Published  
 Generated

Identification Number; press LIST for person, COUNT QUERY HITS for non person; Duplicate Item for Alternate ID look-up.  
Record: 1/1 | ... | <OSC>

\*\* This is an example with a FAKE person – made up for the purpose of training.

Follow these steps to maintain correspondence records.



Note: It is required that any free form comments be initialed and dated. Also, please be sure all comments are free from discriminatory language.

Follow these steps to enter comments.

- a. Access the Comment Form (PPACMNT).
- b. Enter the employee's ID in the ID field or perform a Search.
- c. Perform a Next Block function.
- d. Double-click the Code field and select a Comment Type.
- e. Enter a free-form comment in the Comment field (up to sixty characters).
- f. Enter additional text into the Free Form Comments field.
- g. Click the Save icon.
- h. Click the Exit icon.

## Queries and Reports

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- A. **New Hire Reporting (PERHIRE):** Provides detailed employee information on demographics.
  
- B. **Vet 100 Reporting (PERV100/PZRV100):** Provides detailed employee information on demographics for the veterans reporting.
  
- C. **Affirmative Action Report (PZRAAEO):** Provides detailed employee information on demographics in the workforce. Uses YourFuture and Banner to compile the data.
  
- D. Go to the training website to identify any other reports (<http://mytraining.sdbor.edu>).











1. At Skill, enter the code of the skill for which you are defining a skill level. The code you enter must be predefined in the Skill Codes Rule Form (PTRSKIL) and must be specified there as requiring a skill level. To view a list of defined codes, select the Search feature for the Skill field. The system displays the description associated with the code you entered.
2. At Level, enter a code and a description to identify this skill level.
3. At Skill Value, enter a numeric value that positions this skill level in relationship to other levels of the same skill. This number will be used by the Match Applicants to a Position Report (PARMAPP) to match applicants to a position.
4. To define another skill level, perform the Next Record function and return to Step 1. If your rule definition is complete, perform the Save function. The system enters the current date in the Activity Date fields and saves your new or revised skill level.

Skill	Level	Skill Value	Activity Date
000002	1	20	13-JUN-1994
000002	2	25	13-JUN-1994

## F. EEO Ethnic Code (PTVEEOC)

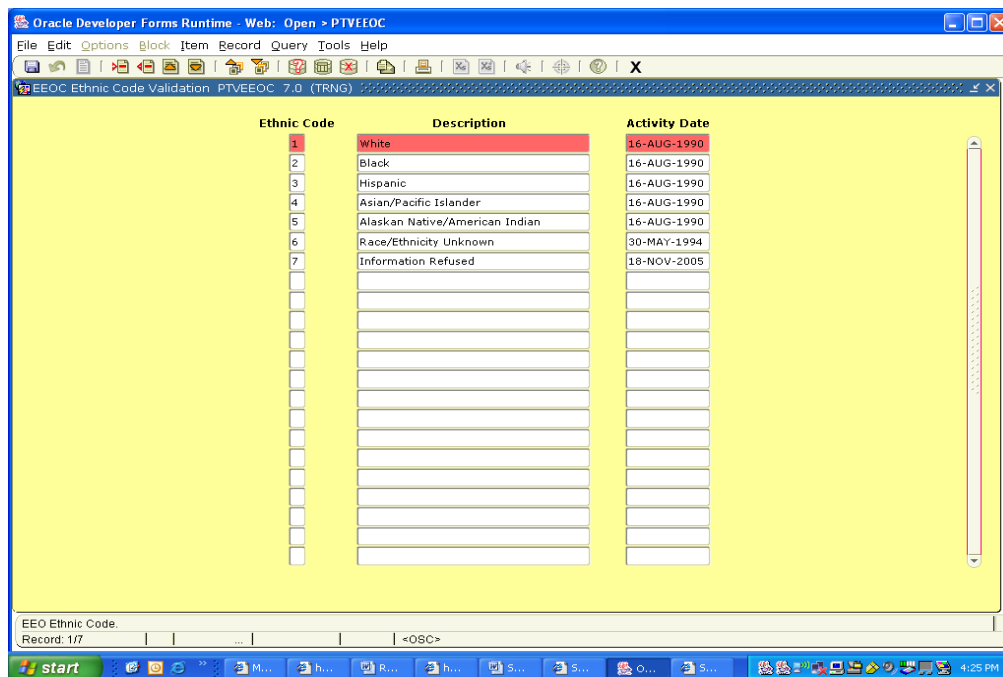
The EEO Ethnic Code Validation Form lists the ethnic categories specified by the U.S. federal government for use in Equal Employment Opportunity (EEO) and IPEDS reporting. The codes defined on this form are entered on the Identification Form (PPAIDEN).

Note: To establish more detailed ethnic specifications for internal use, use the Ethnic Codes Rule Form (PTRETHN). Refer to Chapter 3 of the SCT User Guide, "Rule Forms", for additional information on this form.

The Human Resources System is delivered to you with the following values predefined on this form:

- 1 White
- 2 Black
- 3 Hispanic
- 4 Asian/Pacific Islander
- 5 Alaskan Native/American Indian
- 6 Race/Ethnicity Unknown

These ethnic codes are required by the U.S. federal government and are necessary for the accurate generation of EEO reports. Do not revise this form unless advised to do so by SunGard SCT or changes in federal law. This form will be maintained centrally.

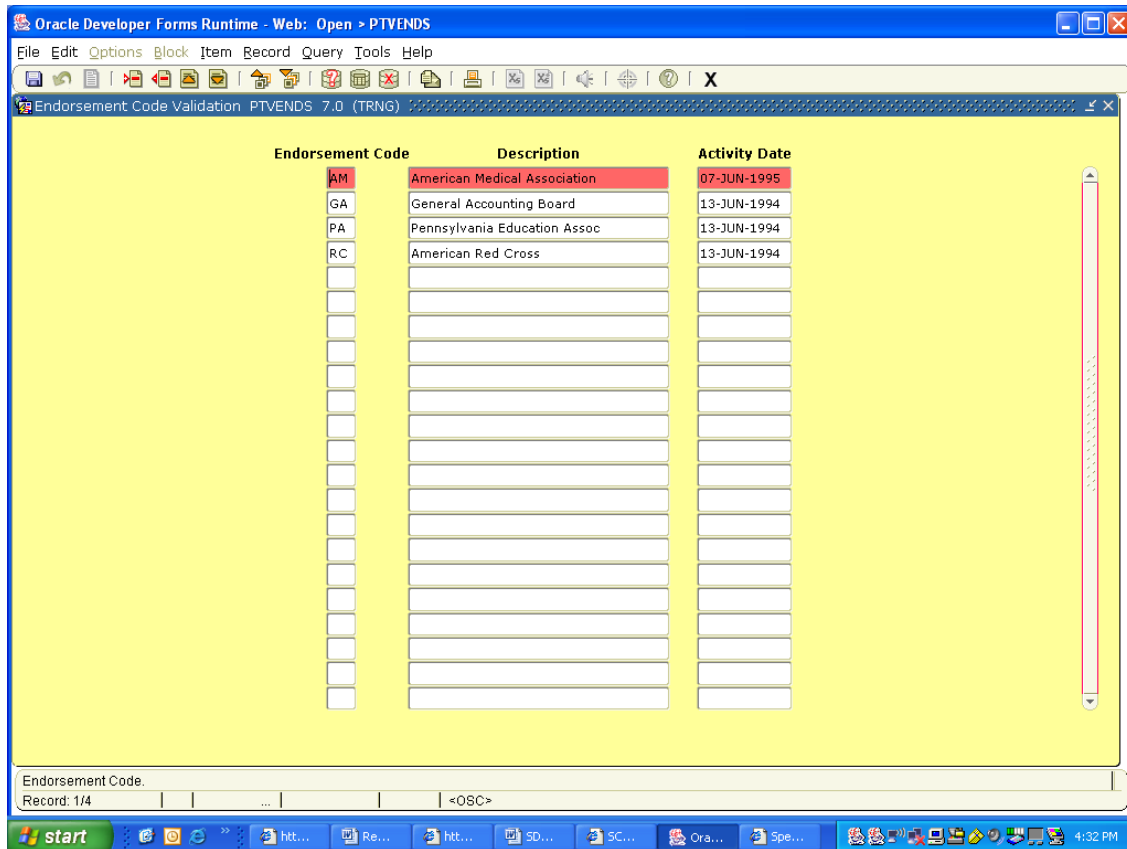


### G. Endorsement Code (PTVENDS)

The Endorsement Code Validation Form enables the organization to define endorsement codes for use in specifying certifying agencies on the Certification Information Form (PPACERT).

Follow these steps to add an endorsement code:

1. At Endorsement Code, enter a unique code to identify the endorsement being defined.
2. At Description, enter a brief freeform description of the category being defined.
3. To define another code, use Next Record and return to Step 1. If the rule definition is complete, perform the Save function. The system saves the new or revised rule to the database and displays the current date in the Activity Date field.



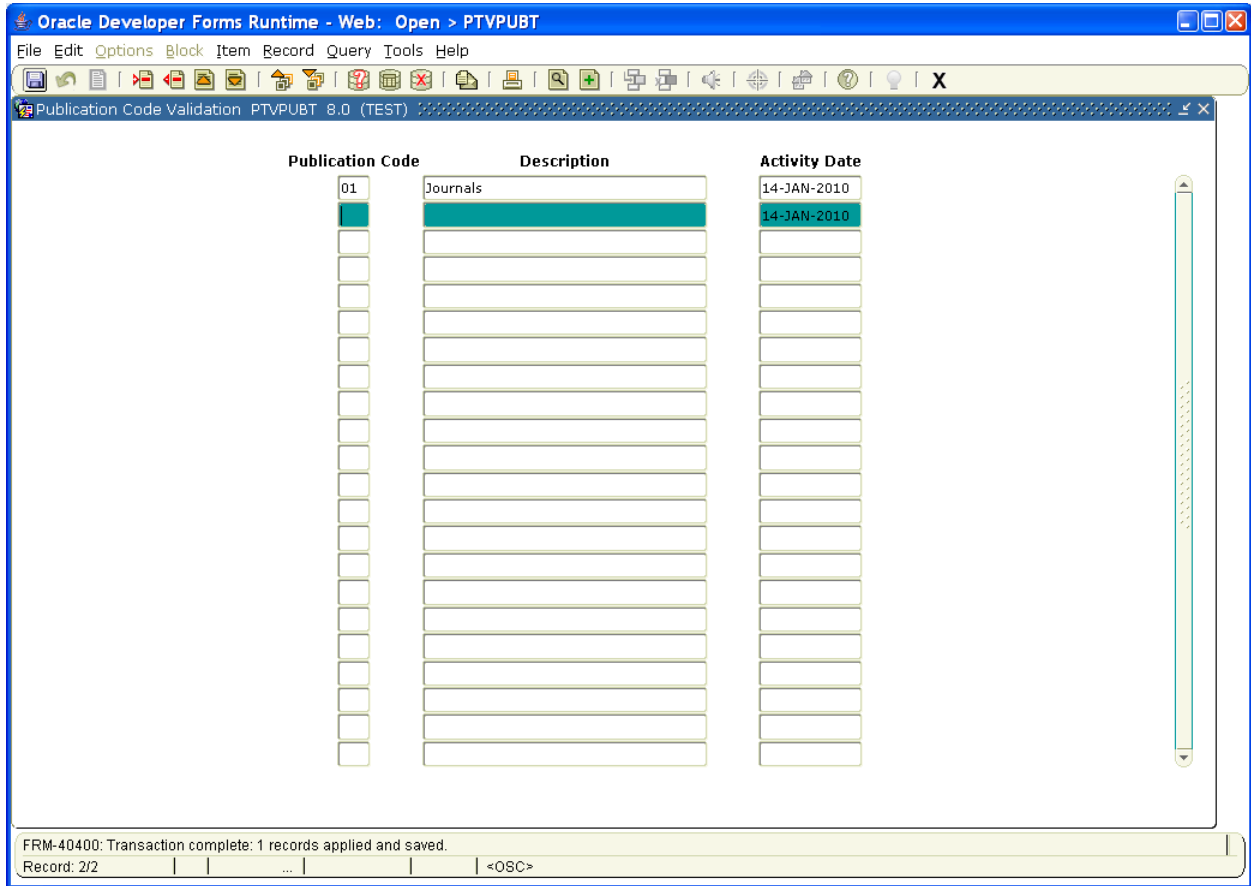
## H. License/Certification Status (PTVLCSV)

The License/Certification Status Validation Form (PTVLCSV) sets up the license and certification status codes for use in the Certification Status Form (PPACERT). The status codes entered in this validation form will be available for the License/Certification Status field on the Certification Status Form (PPACERT). This will not be used by SDBOR at this point.

## I. Publication Code (PTVPUBT)

The Publication Validation Form (PTVPUBT) allows for institutions to track publications

while the employee is employed at the Regents. Currently, this is not utilized.



## II. Rule and Validation Set Up Information

All of the rules and validation variables in this section are related specifically to the institution or employee and are self explanatory. I.e., Certifications, Majors, Degrees, Colleges, etc.

### III. Business Process Analysis

