

**EISE Project Meeting Notes
Eastern Illinois University**

Team/Group: Data Standards

Date: 11/07/2005 and 11/08/2005

Time: 9-11 AM and 1:30-4 PM

Place: ITS Conference Room (3057 Student Services Building

Attendees: Kim Harris, Thom Strohecker, Patti Bailey, Libby Coffey, Julia Abell, Amy Edwards, Dave Horsman, Brenda Majors, Sue Harvey

Note Author: Amy Edwards

Agenda and discussion items

Discussion Items-Updates

- Zip+4 benefits – still looking into logistics because of using USPS software to load City/State/County from 5-digit Zip Code
- Citizenship – Nina will report back to Data Standards - consider 2 choices a) US Citizen/Permanent Resident b) Non Resident Alien
- Telephone Types - CFCG has discussed and agreed to the following telephone types associated with addresses – MA, PR, BI, HQ, MG, P1-P4, SE, RF, PA, BU
- Email – CFCG has discussed and recommended the following types PER-Personal (unlimited number), EIU-campus, Work-employment, P1-P4

Decisions need to be made regarding what should be Policy vs. Procedure vs. Guidelines

- Policy links will not be included in this document due to possible modification in policies.

Continue Development & Refinement of Document

- Still need to review appendices and continue through the document to make sure it is thorough and complete.

Decisions Made

- “Delivered” relationship codes will be used
- Legacy – CFCG has decided to the Multiple code for individuals who have had multiple family members that attended EIU. CFCG agreed to use delivered values with the following changes: add child, daughter, son, grandfather and grandmother as categories and remove grandparent.
- The Data Standards document will be sent to the Data Custodians and Cross Functional Collaboration Group for review.
- The current Ethnicity codes will be converted to 2-digit codes. International will not be included as an ethnicity code in Banner.
- The City/State/Zip Code Tables will be created from a U.S. Postal Service file, Zip+4 may need to be added after City and State are automatically entered from the file.
- Campus Mail Address examples were added to the document.
- Old e-mail addresses and telephone numbers will be marked inactive, not deleted.
- Advancement module will be used instead of alumni/development
- Types will be included in the text of the document and values will appear in the appendices

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Decisions for referral

Continuing Referrals

To Data Custodians and Cathy Ashmore

- Ask them to develop policy and procedures related to the security issues identified above.
- Will Housing continue to responsible for maintaining address information for students
- Role of self service function for each module. What changes will be permitted through Self Service?
- Who will have responsibility of maintaining and verifying other changes (phone, email, etc)
- Who can/should change deceased codes and procedure for notifying campus
- Citizenship – What should the category choices be – do we simply use Yes, No or do we include Resident Alien. This is also being referred to CFCG since it ties very closely to ethnicity. Decision here will have impact on how we do our external reporting.

To Cross Functional Collaboration Group

- Preferred Search Methods/Common Matching guidelines to use when creating records
- Will Housing continue to responsible for maintaining address information for students
- Role of self service function for each module
- Who will have responsibility of maintaining and verifying other changes (phone, email, etc)

To Reporting Standards Team

- How do we want dates and headings printed on standard reports run through the system

New Referrals

To Human Resources

- Use of ‘Current name’ referred to Human Resources for clarification

To Data Custodians and Cathy Ashmore

- Policy for official documentation required for Name and Address changes; and how name types will be incorporated into the name change process.
- Procedures regarding deleting duplicates
- Who makes changes to a person in multiple modules?
- When does a person become an alumni/constituent?

Tabled/Future discussion Items

Shared Validation Tables – Libby

Alumni Name Type – Kim (contacting other schools)

Clarification of Confidentiality in Document

Clarification of Disciplinary Action in Document

Ongoing Task List , Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status
	Work on Document Draft	Kim, Amy, Judy, All	Ongoing	
	Validation Tables, Glossary &	All	Ongoing	Team members need to

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Item Identifier	Item Description	Owner	Target Completion Date	Status
	Appendices Items			send Glossary Items to Kim
	University & Dept Abbreviations Tables	Doug	Ongoing	
	Zip+ 4 Advantages	Kim	Ongoing	
	Auto Population of city, state, county	Libby	Ongoing	
	Explanations associated with types/values	Libby, Kim	Ongoing	Libby will send to Kim to include in the document

New Action Items

Item Identifier	Item Description	Owner	Target Completion Date	Status

Attachments and/or meeting Handouts listed: