

Augustana College

Colleague Procedures  
and Business Practices

June 30, 2009 BW

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## **Introduction – Colleague CORE Manual**

Datatel's Colleague software represents a different way of doing business for Augustana that fosters interaction among various offices on campus. The goals of this manual are to:

- ✓ Provide guidelines for consistent style and compliance with the USPS
  - ✓ Eliminate confusion in procedures
  - ✓ Provide procedures to enable reliability and validity of data
  - ✓ Enable improved reporting through the use of "good" data
- 

Colleague is composed of the CORE, Financial, Human Resources, Student System, Residential Life, and Advancement applications. Within each application there are numerous modules and within those modules there are screens, or forms, to create, maintain, report, and run processes related to data entered in Colleague. The primary focus of this manual is how demographic data for both persons and organizations should be entered and maintained.

CORE is a Colleague application, or system. The CORE application contains information central to the database and the institution, including the creation of purchase orders, processing registrations, and printing payroll checks.

The CORE application is integral to the other applications in that it allows for the sharing of common information about people and organizations and to accomplish common tasks, such as keeping track of communication with students or job applicants. This integration provides the following benefits to Augustana:

- ✓ Sharing of information across the campus with minimal effort
- ✓ Streamlining administrative processes
- ✓ Eliminating redundant data entry
- ✓ Increasing productivity

Reporting is easier because:

- ✓ Data is up-to-date
- ✓ Data is consistent
- ✓ The information is coming from one database

Demographic information is data about people and organizations that includes names and addresses, identification numbers, grouping codes, phone numbers, relationships to others, and reason(s) a person may be in the database.

A variety of people will be added to the database:

- ✓ Employees
- ✓ Applicants
- ✓ Students
- ✓ Parents
- ✓ Contacts
- ✓ Alumni

Information about organizations will also be maintained in the database that includes:

- ✓ Vendors and contractors
- ✓ Corporations and foundations
- ✓ High schools
- ✓ Colleges and universities
- ✓ Associations

Colleague stores all demographic information in a table. Every person and organization entered, or converted, into Colleague will have a record in the table and each will have a unique ID number. Colleague ID numbers are, by default, seven characters in length.

This file will grow to be very large over a period of time; **it is imperative to avoid occurrences of duplicate records**. Duplicate records are time consuming to combine and eliminate because a number of other tables may be linked to that record. Having consistent methods for users to follow will not only lessen the confusion about searching and using the database but will also decrease the probability of having multiple records for the same person.

The Name and Address (**NAE**) screen is one of the most fundamental screens in Colleague. This screen will be used each time a new person is entered in the database. Regardless of which application or module that is being used, the **NAE** screen will be brought up to enter this information. All organizational or corporate entities are defined on the Organization Profile (**ORGP**) screen.

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This manual was prepared by the CORE Committee and approved by the AIMS Council.

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Questions and feedback should be directed to the Help Desk (x7293)  
or your representative named above.

## Logging In

**NOTE:** If you have problems with any of the steps 1-8, see the “Troubleshooting Log-in Errors” section.



1. If you have a Datatel Icon on your Desktop, double click on it to start Colleague
2. If you do not see a Datatel Icon on your desktop:
  - a. Click Start
  - b. Click Programs
  - c. Click Datatel
  - d. Click Datatel
3. You are now at the login screen shown on the right.
4. Enter your User ID and password.
  - a. The User ID is the same as your Augustana Username. (e.g. adcbw or bethweber)
  - b. The password is case sensitive
5. Select the database you wish to use from the pull-down menu.
  - a. This will normally be “Production”
  - b. In training situations, you may be asked to log into another database such as “Training” or “Test”.
6. Click OK
7. A dialog box will appear informing you that Colleague is being loaded.
8. If Colleague informs you that your scripts need to be refreshed, click OK.
  - a. A number of windows may flash on your computer screen. Just wait.
  - b. When the scripts have been refreshed, you will see a message telling you to restart the Colleague application.
  - c. The software will automatically close Colleague, and you can begin at step 1 again.

The image is a screenshot of a Windows-style dialog box titled "Datatel Login". The dialog box has a blue header bar with the title. Below the header, it says "Enter a User ID, Password and Database:". On the left side, there is a small graphic of a tower. To the right of the graphic, there are three input fields: "User ID:" with a text box, "Password:" with a text box, and "Database:" with a pull-down menu showing "Production". At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

You assume responsibility and will be held accountable for all data modifications made using your user ID and Password. Always keep your personal passwords private. Passwords are not to be written down or shared with others.

**NOTE:** Always sign off a workstation when leaving the immediate work area for an extended period of time.

## Troubleshooting Log-in Errors

**ERROR:** “Your session has terminated unexpectedly. The application is forced to exit.”

**SOLUTION:** Click OK and try to log in again.

**ERROR:** “Login name and password incorrect, please try again.”

**SOLUTION:** You may have:

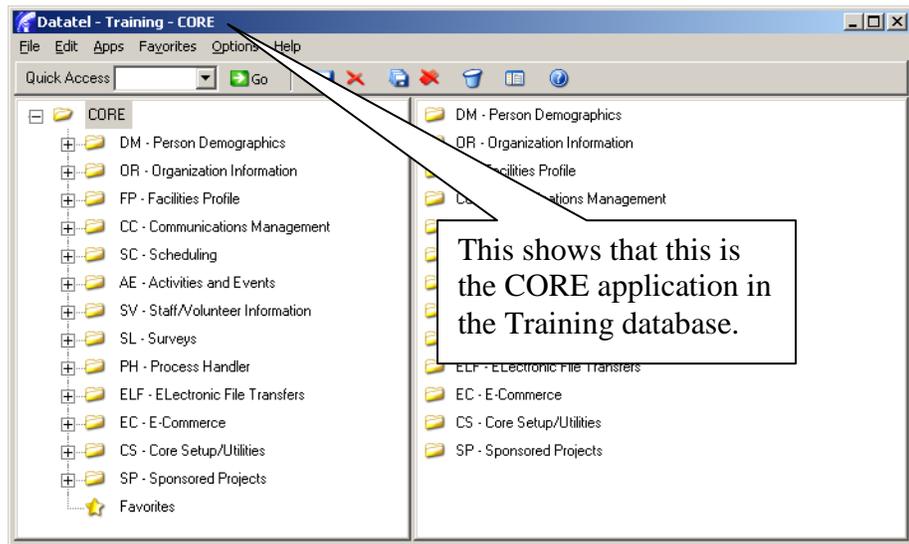
- ✓ Had the cap locks on
- ✓ Used the wrong database, i.e. Test or Training instead of Production
- ✓ Entered your password incorrectly

**All other errors should be reported to the ITS Help Desk at x7293.**

Once you have logged into Colleague, the screen is displayed as shown below.

If you have access to multiple “applications” in Colleague, you may need to move between them.

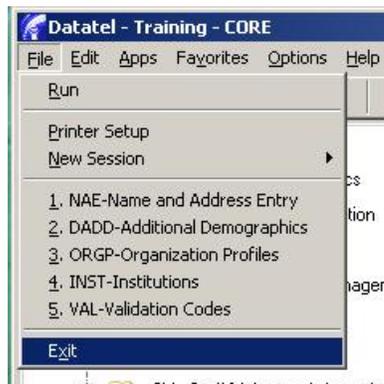
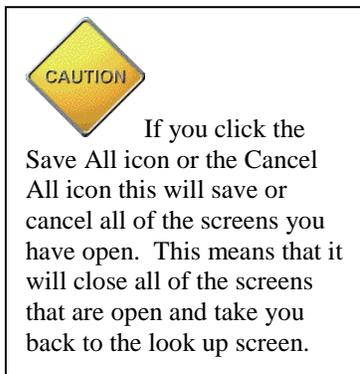
1. Click on Apps on the menu bar.
2. Click on the Application to which you wish to move.



## Logging Out

Note: There are a limited number of licenses for Colleague. If you are not using the system please log out so you will free up a license for others on campus to use.

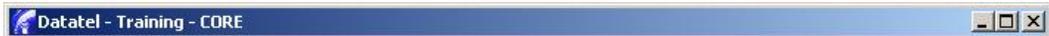
1. Go through the screens that you have open and either save your changes by clicking the “save” icon  or “cancel” . If you click on “cancel” your changes will not be saved. If you want to save all of your changes on all of the screens that you have open click on the “save all” icon  or if you want to cancel all of your changes on all of the screens that you have open click on the “cancel all” icon .
2. Go to File – Exit to close Colleague.



## Navigating Colleague

### System Menu Bar

The System menu enables you to maximize, minimize, and exit Colleague by clicking on the boxes in the far upper right hand corner.



- ✓ **DO NOT** use the X to close out of the program. Instead, click File on the menu bar and then Exit.
- ✓ The menu bar also indicated where you are. In the blue bar above, you can see that you are in the Training database and the CORE application.

### Menu Bar



The menu bar enables you to:

- ✓ Use “File” or “Edit” to perform routine tasks, such as saving your work or cutting and pasting items.
- ✓ Use “Apps” to choose an application. For example, (ST) Student, (CF) Colleague Financials or (HR) Human Resources (depending upon your security).
- ✓ Use “Favorites” to choose a screen in which to work. See Favorites section to set your own up.
- ✓ Use “Options” to define your preference for how screens are displayed.
- ✓ Use Help for field, function or process help.

### Quick Access Toolbar



The toolbar provides easy access to common functions. See the list below for an explanation of the items on the toolbar.

- |   |  |   |                       |
|---|--|---|-----------------------|
|  | - save the screen you are on           |  | - delete a record     |
|  | - cancel changes on the current screen |  | - hide/show Tree Menu |
|  | - save all open screens at once        |  | - use help function   |
|  | - cancel all open screens at once      |   |                       |

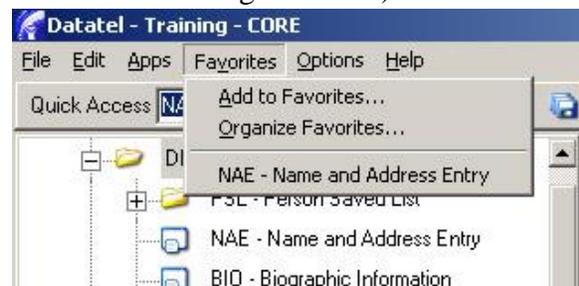
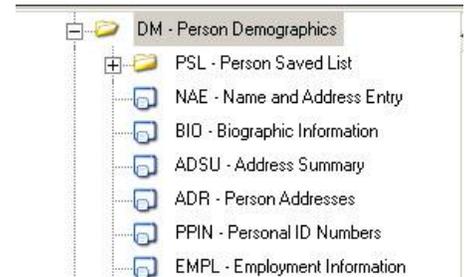


- Directly access a screen by typing the mnemonic (screen name) and clicking on Go. (Examples of a mnemonic would be: **NAE** or **DADD**)

## Accessing a Screen

There are several ways to get to a particular screen from the main Colleague window. They include:

1. From the Quick Access Toolbar
  - a. Enter the screen mnemonic  
(Examples of a mnemonic would be: **NAE** or **DADD**)
  - b. Press Enter or click on the “Go” icon
2. Using the file folders on either the left of right
  - a. Open the folder by clicking on the plus sign so you can see the folders/screens within them
  - b. Double click on the screen mnemonic you want once you find it. e.g. **NAE**
3. From the Menu bar
  - a. Click File
  - b. Click Run
  - c. Enter the mnemonic for the screen you want in the box shown to the right.
4. Using the Favorites from the Menu bar (see section on Setting Favorites)
  - a. Click Favorites
  - b. Click on the appropriate window.



Note: Each of the folders is a cascading menu; that is, they contain a series of subfolders and screens. A minus sign indicates that the folder is fully expanded and you are seeing all of the subfolders in that folder. A plus sign indicates that there are contents that you are not currently viewing. You can click on the plus and minus signs to expand and contract a folder. Other icons that you may see include the following:



**Maintenance icon** – for screens that allow you to enter and change data



**Inquiry icon** – for screens that allow you to view only



**Reporting icon** – for screens that allow you to generate reports



**Processing icon** – for screens that start a program to manipulate a record or group of records behind the scenes, such as posting a group of transactions to the general ledger.

## Header Block

The header block displays data that identifies the item with which you are working. This will appear at the top of many screens.



The information in the header block is determined by the CORE Team and is the same for most applications.

### Fields Included:

Full name  
ID  
City  
Home Phone  
Fall Credits  
Winter Credits  
Spring Credits  
Start Term  
Reunion Class

**Active credit hours for the fall, winter and spring term:** This reflects how many credits a student is registered for. If a student drops a course the credit hours will change. This field will always reflect the newest term information for example: once pre-registration happens for fall term the credit hours for Fall would reflect the new fall credit hours. The field would no longer show if the student was not registered.

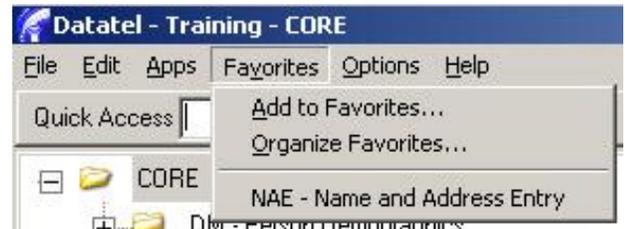
**Start Term and Admit Status:** The codes for admit status are:

F = Former  
FY = First Year  
N = Non degree  
X = Transfer

## Setting Favorites

Once you have been using Colleague regularly, you may want to create your own Favorites. To set your own favorites:

1. Select Favorites on the Menu Bar
2. Select Add to Favorites
3. Enter the Mnemonic of the screen you wish to add to Favorites
4. Click OK
5. Colleague will now remember the screen for you.



OR

2. Navigate through the folders and find the screen that you want to add to your favorites
3. Right click on that screen name in the folder list and choose Add to Favorites.

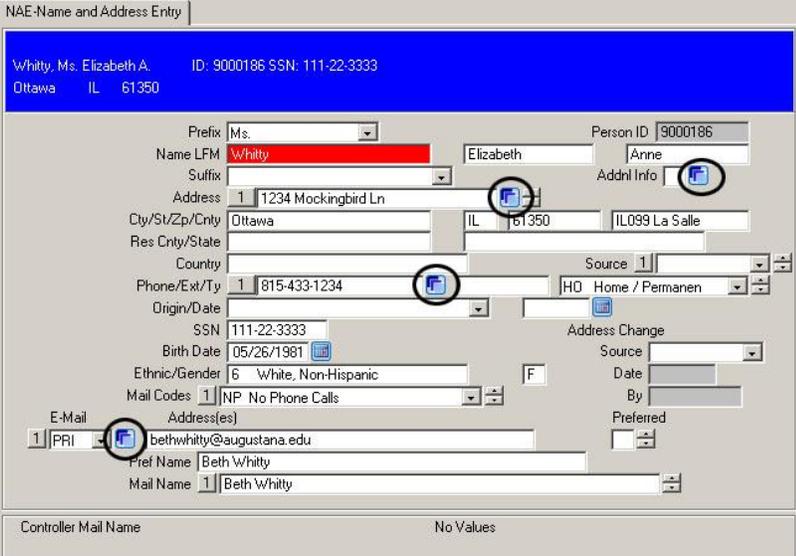


The next time you go to Favorites, you will find the screen listed, and you can go to that screen by simply selecting it.

## Details Screen

Some screens only give you limited or summary information. Detailed screens can often be accessed via the summary screens. The detailed screens provide more complete information.

The picture on the right is an example of a screen that give you access to detail screens. To the right of the field label “Addnl Info” is an icon  that allows you to choose other screens that contain more information about the person.



NAE-Name and Address Entry

Whitty, Ms. Elizabeth A. ID: 9000186 SSN: 111-22-3333  
Ottawa IL 61350

Prefix Ms. Person ID 9000186  
Name LFM Whitty Elizabeth Anne  
Suffix Addnl Info 

Address 1 1234 Mockingbird Ln   
City/St/Zp/Cnty Ottawa IL 61350 IL099 La Salle  
Res Cnty/State  
Country Source 1  
Phone/Ext/Ty 1 815-433-1234  HD Home / Permanen  
Origin/Date  
SSN 111-22-3333 Address Change  
Birth Date 05/26/1981  Source  
Ethnic/Gender 6 White, Non-Hispanic F Date  
Mail Codes 1 NP No Phone Calls By  
E-Mail Address(es) Preferred  
1 PRI  bethwhitty@augustana.edu  
Pref Name Beth Whitty  
Mail Name 1 Beth Whitty

Controller Mail Name No Values

Many of the detail screens are also available directly by using the methods in the “Accessing a Screen” section. If it cannot be directly accessed, an error message of “Invalid Selection” will appear. E.g. ACTM (Academic Term) can only be accessed via the RYAT (Reporting Years and Terms) screen.



MENU

Select Item

- BIO - Biographic Information...
- EMPL - Employment Information...
- FINF - Foreign Person Information...
- EMER - Emergency Information...
- DADD - Additional Demographics...
- FNM - Formatted Names...

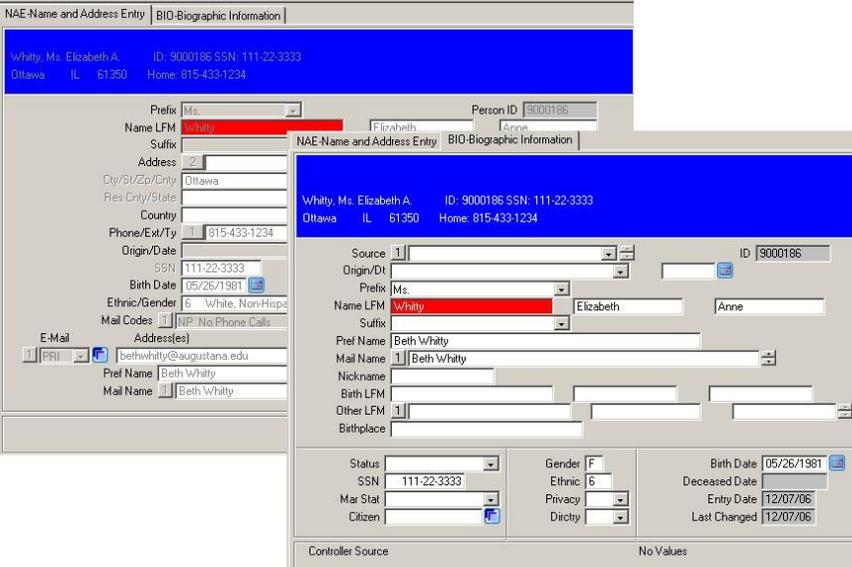
Selected Item

OK Cancel Help

1. Click on the detail icon 
2. The Menu will appear
3. Select one of the listed screens

When you select one of these additional screens, Colleague will take you to that screen for the current person or organization.

Two tabs will appear at the top of the screen. The screen that was detailed from (NAE) will remain viewable, but will be grayed out if you click on it. You cannot actively edit both the NAE and BIO at once. You will need to save or cancel out of the BIO in order to edit the NAE again.



NAE-Name and Address Entry BIO-Biographic Information

Whitty, Ms. Elizabeth A. ID: 9000186 SSN: 111-22-3333  
Ottawa IL 61350 Home: 815-433-1234

Prefix Ms. Person ID 9000186  
Name LFM Whitty Elizabeth Anne  
Suffix Addnl Info 

Address 2  
City/St/Zp/Cnty Ottawa  
Res Cnty/State  
Country Source 1  
Phone/Ext/Ty 1 815-433-1234  HD Home / Permanen  
Origin/Date  
SSN 111-22-3333 Address Change  
Birth Date 05/26/1981  Source  
Ethnic/Gender 6 White, Non-Hispanic F Date  
Mail Codes 1 NP No Phone Calls By  
E-Mail Address(es) Preferred  
1 PRI  bethwhitty@augustana.edu  
Pref Name Beth Whitty  
Mail Name 1 Beth Whitty

NAE-Name and Address Entry BIO-Biographic Information

Whitty, Ms. Elizabeth A. ID: 9000186 SSN: 111-22-3333  
Ottawa IL 61350 Home: 815-433-1234

Source 1 ID 9000186  
Origin/Dt  
Prefix Ms.  
Name LFM Whitty Elizabeth Anne  
Suffix  
Pref Name Beth Whitty  
Mail Name 1 Beth Whitty  
Nickname  
Birth LFM  
Other LFM  
Birthplace

Status SSN 111-22-3333 Gender F Ethnic 6 Birth Date 05/26/1981   
Mar Stat Privacy Deceased Date  
Citizen Dicity Last Changed 12/07/06

Controller Source No Values

## User Interface Keyboard Shortcuts

(Alternative keystroke combinations separated by | )

Look up by Augustana ID (case sensitive)	;AID<AugieID> (e.g.:AID a62958)
Move to the next field	Tab
Move to the previous field	Shift + Tab
Move forward one row	Down Arrow
Move back one row	Up Arrow
Move forward one screen	Page Up
Move backward one screen	Page Down
Move to the beginning of the current field	Home
Move to the end of the current field	End
Move to the first row of a window	Ctrl + Home
Move to the last row of a window	Ctrl + End
Field insert	Ctrl + I   Insert   F3
Field delete	Ctrl + D   Alt + F, F   Alt + E, D   F4
Open the File menu	Alt + F
Cancel	Alt + F, C   Shift + F8
Save (Update)	Alt + F, S   F10
Close (Finish)	Alt + F, L   F9
Detail	Alt + F, D   F2
Direct Access	Alt + F, A   F8
Record Delete	Alt + F, R   Shift + F10
Exit	Alt + F, X   Shift + F9
Open the Edit menu	Alt + E
Open the Apps menu	Alt + A
Open the Help menu	Alt + H
Field Help	Alt + H, F   F1
Process Help	Alt + H, P   Shift + F1
Keyboard Shortcut Help	Alt + H, U   Shift + F2
Pull down the Favorites menu	Alt + V
Pull down the Options menu	Alt + O
Pull down the Help menu	Alt + H   F1

(This info also accessible from Help Menu → Function Help)

## Navigational Quick Reference for User Interface

 /F10	<p>This disk represents the update or save feature in Colleague. By clicking this button at the top of the form, you will save the file you are working on.</p>
 /Shift + F8	<p>This red “X” indicates the cancel feature in Colleague. By clicking this button at the top of the form, you will cancel out of the record you are working in <i>without saving the information</i>.</p>
	<p>Multiple disks indicate the multi-form save in Colleague. By clicking this icon, you can save out of multiple forms that are open with one click and return to the main menu.</p> <p><b>NOTE: F9 will update but will not save all the way to the main menu.</b></p>
	<p>Multiple red “X”s indicate the multi-form cancel feature in Colleague. By clicking this icon, you will cancel all of the changed information in all of the forms that are open in Colleague.</p>
	<p>Clicking on this button allows you to detail to other forms without having to exit back to the main menu. For example, clicking on the detail button next to the name field in <b>NAE</b> brings you to a menu of forms related to person demographics.</p>
 /F1	<p>For field help, put your cursor in the field in question and hit the F1 key. This will bring up field help and should answer any questions you have.</p>
	<p>When a number is next to a field, Colleague is alerting you that this field is multivalued. For example, in the address field and <b>NAE</b>, This number indicates the <i>line</i> of the street address you are looking at. The number next to the phone field indicates which line of phone information you are viewing. Use the ENTER key here to maintain (or view) other lines of information, or click on the  to scroll through the lines of information.</p>
<p>@</p>	<p>Typed in the LookUp box, the “@” sign will bring up the most recently viewed record.</p>
<p>=</p>	<p>Type the “=” sign at the beginning of the text to override capitalization rules.</p> <p>e.g. In the name field on the <b>ORGP</b> screen, type “=IBM” to keep all letters capitalized.</p>
<p>...</p>	<p>In a code file field, you will see a message at the bottom of the form that says “lookup”. This indicates that the field is indeed a code file. To see a list of codes stored in the system for this field, type “...”. Or, if you know the code you are looking for, simply type it in the field. (Example: if you enter “...” in the country field on the <b>NAE</b> screen it will list all of the available countries to choose from.)</p>

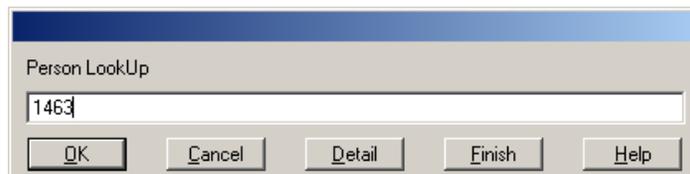
## Individual Search Procedures

These procedures are for all Colleague users to follow when performing name searches to prevent duplicate records from being created. If at any time you discover that a person was entered into the database by the use of a different spelling of a name, a shortened name, nickname, former name, maiden name, etc., you should fill out a change form (*Appendix E*) and send it to the person in your office that has access to change a record.

If you are searching for an existing Person record, you should always use the Colleague ID when it's available.

### Search by Existing Colleague ID (Preferred Method)

1. Select the **NAE** screen
2. Enter the number into the Look-Up dialog box (leading zeros not required)
3. Click OK
4. e.g. To search for a student with Colleague ID 0001463, you would enter 1463 in the Look-Up box and click OK

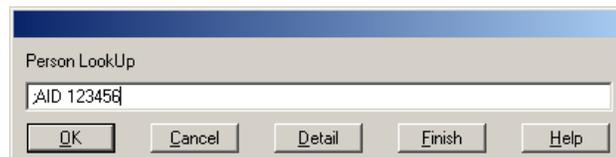


The screenshot shows a dialog box titled "Person LookUp". It has a text input field containing the number "1463". Below the input field are five buttons: "OK", "Cancel", "Detail", "Finish", and "Help".

Otherwise, the following searches **must** be done prior to creating a new record. They are best practice procedures, in recommended order.

### Search by Legacy ID (Alternate ID Number, which appears on DADD screen)

1. Select the **NAE** screen
2. Enter ;AID <Old ID>, where <Old ID> is the person's old ID number (Legacy System it came from). It is case sensitive.
3. Click OK
4. e.g. To search for the person with the Alternate ID of 123456, enter ;AID 123456 in the box and click OK



The screenshot shows a dialog box titled "Person LookUp". It has a text input field containing the text ";AID 123456". Below the input field are five buttons: "OK", "Cancel", "Detail", "Finish", and "Help".

### Search by Social Security Number

1. Select the **NAE** screen
2. Enter all 9 digits of the SSN without dashes. (e.g. 123456789)
3. Click OK

### Search by Last Name and City or State

1. Select the **NAE** screen

To Search by Last Name and City:

2. Enter partial Last Name; City City Name. (Example: Sm; city Podunk)
3. Click OK

To Search by Last Name and State:

2. Enter partial Last Name; St State Name. (Example: Sm; st IL )
3. Click OK



Colleague remembers the last record you were in. If you want to access the same person again, type @ (shift + 2). This can be on the same screen, or on a different screen.



If a Legacy ID is 1006 you must enter zeros before the ID Number so there are 6 digits. So 1006 would equal 001006





You can also select a record by entering the number (listed to the left of the name) in the box in the bottom right corner and pressing Enter.

## Selecting More Than One Record at One Time

1. By highlighting each record
  - a. Click to the left of each record you wish to select.
  - b. The box will then have a check mark in it.
  - c. Click on the disk button to bring the records to your screen.
  - d. Once you save or cancel out of the first record, you will have the option to go to the next record or to discard the group of records selected.
2. To use the Flag option to flag specific records:
  - a. Enter "F"
  - b. Press Enter
  - c. Enter the first record number you want to select
  - d. Press Enter
  - e. Enter the second record number you want to select
  - f. Press Enter
  - g. Continue in this fashion until you have selected all the records you want.
  - h. Click on the disk button to bring the records to your screen.
  - i. Once you save or cancel out of the first record, you will have the option to go to the next record or to discard the group of records selected.
3. To select all records:
  - a. Click the box to the left of the Seq: Name heading (clicking it again will de-select all records) - or -
  - b. Use the Flag option to flag all records on the resolution screen by entering "FA" (Flag All) in the box at the bottom to flag all the records that are on the resolution screen.
  - c. Click on the disk button to bring the records to your screen.
  - d. Once you save or cancel out of the first record, you will have the option to go to the next record or to discard the group of records selected.

Seq: Name	Address	SSM
<input checked="" type="checkbox"/> 1: Webber, Astrid P	12600 Fair Lakes Cir	
0000613	Fairfax, VA 22033	11/02/01
STA - Staf	STA	
<input checked="" type="checkbox"/> 2: Webber, Eric Scott	12600 Fair Lakes Cir	
0000616	Fairfax, VA 22033	11/02/01
STA - Staf	STA	
<input checked="" type="checkbox"/> 3: Webber, Jack T	12600 Fair Lakes Cir	
0000611	Fairfax, VA 22033	11/02/01
STA - Staf	STA	
<input type="checkbox"/> 4: Webber, Jessica Q	12600 Fair Lakes Cir	
0000619	Fairfax, VA 22033	11/02/01
STA - Staf	STA	

Controller Lookup Resolution Page 1/4  
Seq Number, (F)lag, (V)iew, (S)ort/Select, (A)dd:



If your search returns several records and you only want to see people – Enter "V" for view and then enter the number that corresponds to the Individual records. The resolution screen will show only individual records after pressing enter.

1= all  
2 = individuals  
3 = corporations

## Minimum Entry Required before Creating a New Person Record

Required fields – the following fields must be entered for every person in Colleague:

First Name	Last Name	Street Address
City	State	Zip Code
Origin	Origin Date	

Fields that must be entered when information becomes available:

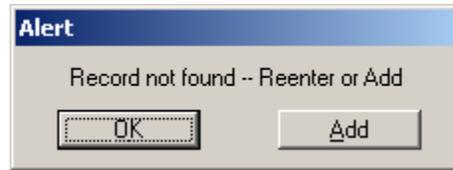
SSN	Middle Name	Phone Number
Birth Date	Gender	Phone Type

### Creating a New Record

Only after the Search Procedures (pages 11-12) have been done and it is determined that the person you are looking for does not exist in Colleague, may you proceed to add the person to the database or to contact the person in your office who has access to add a record.

If you do not get a resolution screen with a list of possibilities, the following prompt will appear.

1. Click Add
2. Colleague will automatically assign a new number to the person.



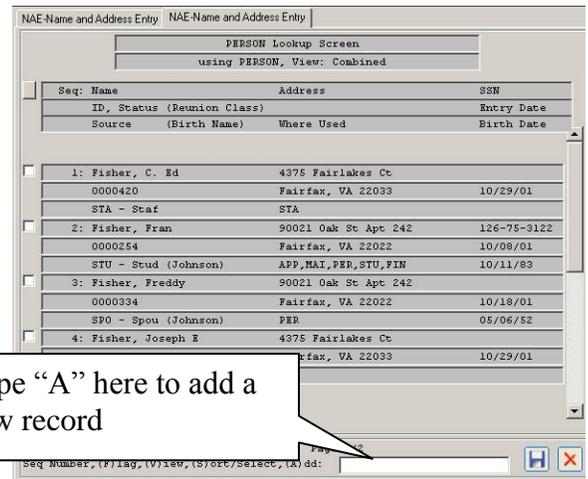
OR

If you did a SSN search that did not yield any results, you will get this Alert and need to do another search by name.



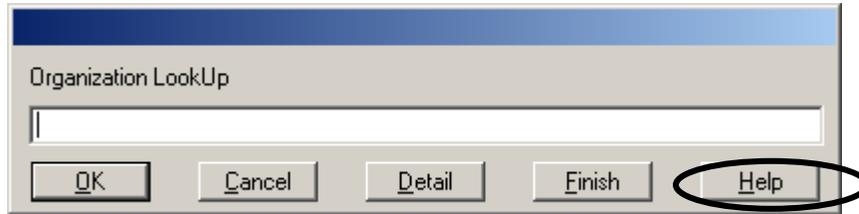
If you get a resolution screen with possible matches, but they are not the person you are looking for, then:

1. Enter "A" in the box at the bottom of the screen.
2. Click on the disk
3. Colleague will automatically assign a new number to the person.

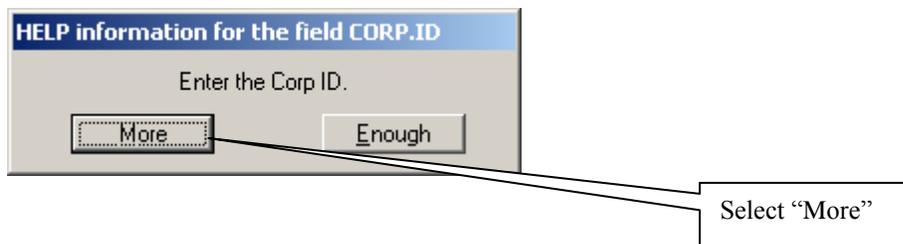


## How to Use Help – Some Examples

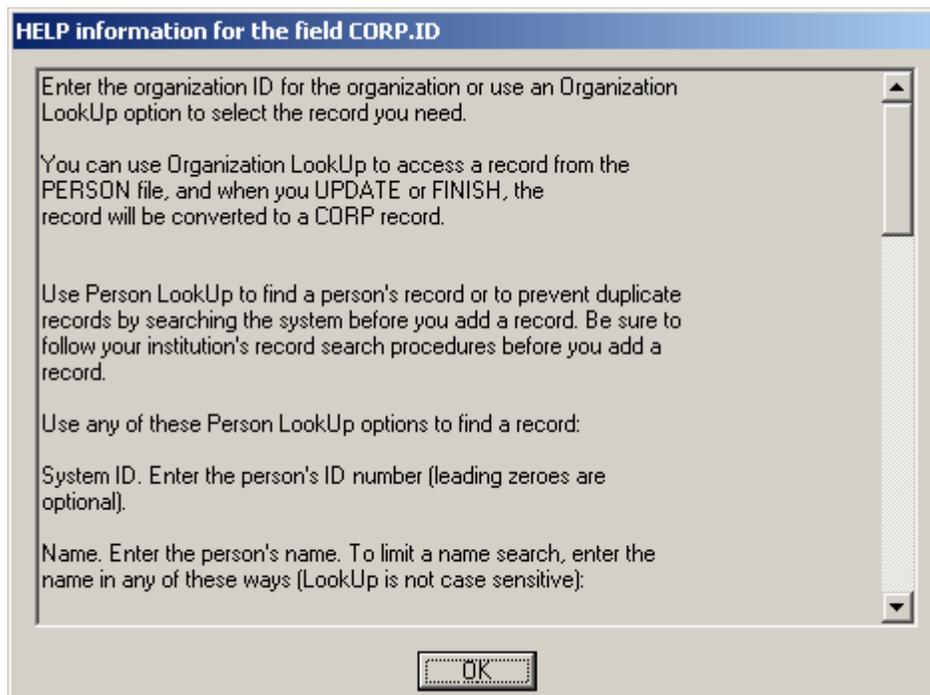
### 1. LookUp Help



Example: If the **ORGP** screen is selected, the above dialog box will appear. Select "Help" or use the F1 key and this screen will appear:



This screen will appear:

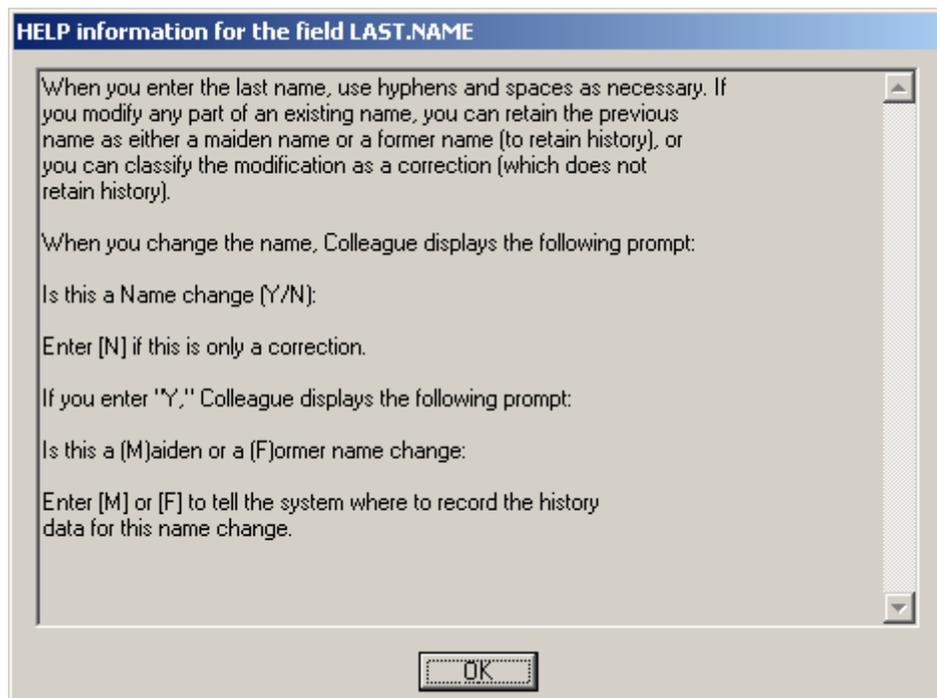


## 2. Field Help

Click on field, then use F1 key and this screen will appear:



Example: If cursor is on “Name LFM” field on **NAE** screen, use F1 key and this screen will appear:

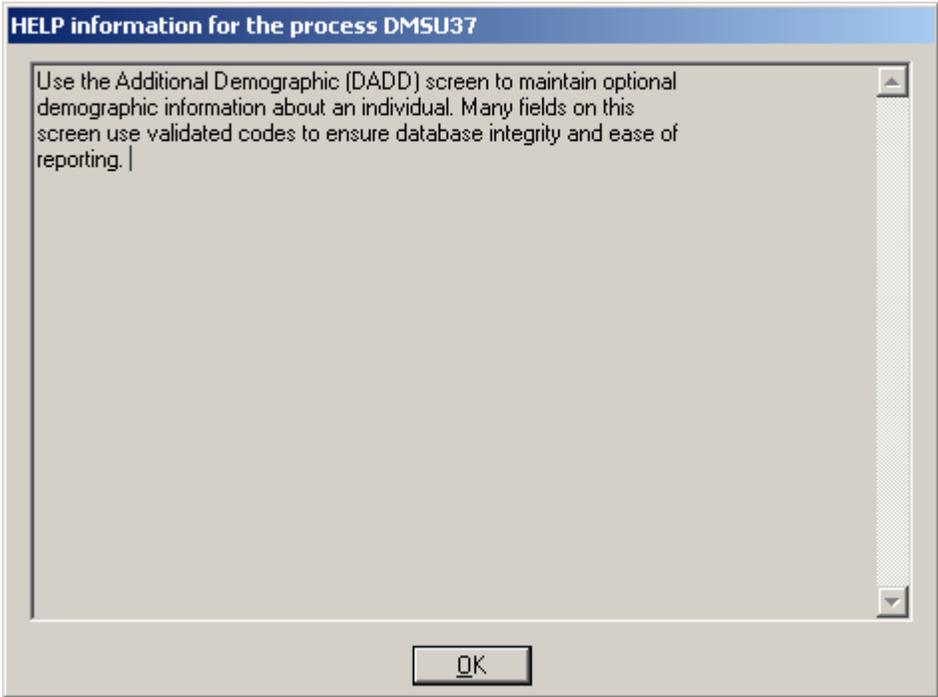


## 3. Field, Function, or Process Help

Select from pull-down menu bar



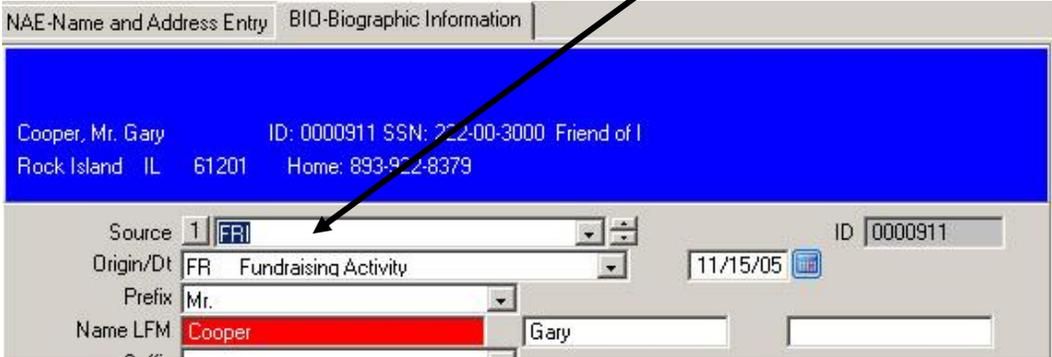
Example: If Process Help is selected while on the **DADD** screen, this screen will appear:



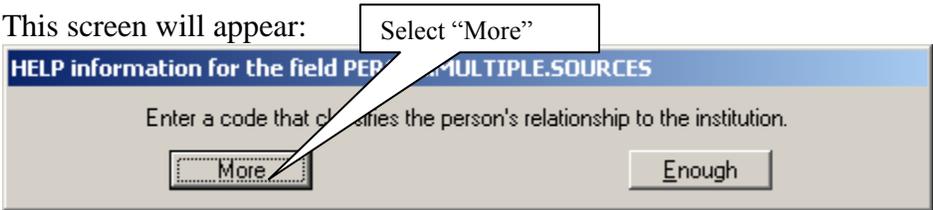
**4. "Help" on Menu Bar**



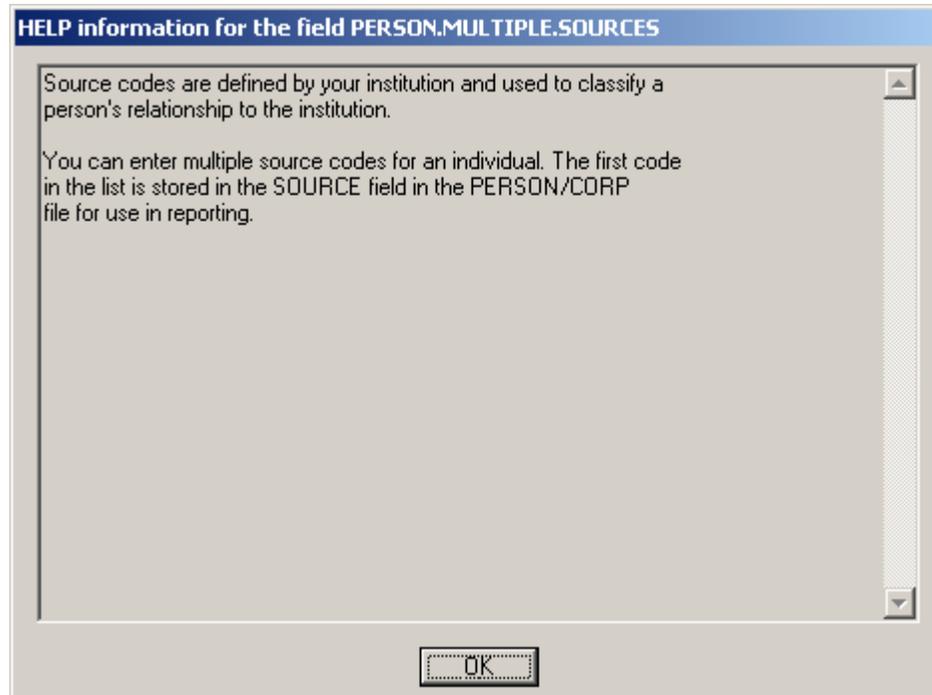
Example: If Help is selected while cursor is in "Source" field on **BIO** screen,



This screen will appear:



This screen will then appear:



## **Person Address Data Entry Standards**

Augustana's CORE Team has established standards for all Colleague users to follow when entering personal addresses into the database. These standards have been approved by the AIMS Council.

### **General Rules for Entering Addresses**

- ✓ Augustana's CORE Team has identified standard casing and abbreviation rules (PID3-Capitalization Rules). A list can be found in *Appendix A*.
- ✓ Common address abbreviations have been automated to correspond to USPS recommendations. (e.g. Avenue = Ave, Boulevard = Blvd, Street = St)
- ✓ Two-letter state and possession abbreviations from the USPS are in *Appendix B*.
- ✓ Cities such as Saint Paul or Fort Myers should be spelled out rather than abbreviated as St or Ft. This is true for any city where an abbreviation could be used.
- ✓ For questions about Colleague or data entry standards, please consult the Help Desk (x7293) for referral.
- ✓ For unusual addressing situations or questions on USPS standards, please consult the College Center Mail Room (x7289).

## Email Standards

There are three email types: Augustana, Personal, and E-Mail Forwarding.

- ✓ Augustana = student or employee Augustana email address (e.g. [bethwhitty@augustana.edu](mailto:bethwhitty@augustana.edu))
- ✓ Personal = prospect, alumnus, friend or organization email address (e.g. [lovesgolf@yahoo.com](mailto:lovesgolf@yahoo.com))
- ✓ E-Mail Forwarding = permanent Augustana email address available to all current students and alumni (e.g. [susan-olsen02@augustana.net](mailto:susan-olsen02@augustana.net)) (See <http://www.augustana.edu/alumni/resources/emailforward.php> for details.)

**NOTE:** Once a prospect student becomes a student at Augustana all correspondence will go to their Augustana email.

## Address Types

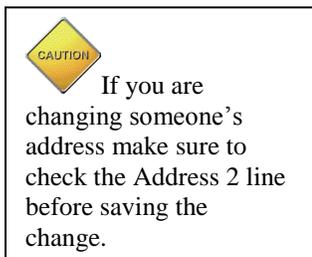
These are the address types used by Augustana College:

<b>HO</b>	<b>Home/Primary</b>
<b>BO</b>	<b>Business</b>
<b>TE</b>	<b>Temporary</b>
<b>SE</b>	<b>Seasonal</b>
<b>PO</b>	<b>Purchase Order</b>
<b>CK</b>	<b>Check</b>

## Building Identifiers

- ✓ Enter the building identifier in the Address 2 field.
  - To get to Address line 2 click on the down arrow to advance from Address line 1
  - **NOTE:** To get back to Address line 1 click on up arrow.

**WARNING:** When you are entering an address in Address 1 and hit the enter key it will take you to the Address 2 line. It looks as if the address didn't take because it will automatically advance the line. Make sure to watch your Address numbers! (Note if bottom of screen says Value 1/2 if cursor is in address field. That means you are in the first of two lines.)



The image shows two screenshots of an address form. The top screenshot shows 'Address 1' with the value '90021 Oak St'. A blue circle highlights a down arrow icon on the right side of the address field. A black arrow points from this icon to the bottom screenshot, which shows 'Address 2' with the value 'Apt 242'. The 'Ct/St/Zp/Cnty' field is 'Fairfax', the state is 'VA', and the zip code is '22022'.

**Note:** If you put your cursor in the address line and look at the bottom of the screen you can see how many address lines are entered. In the example below the cursor is in the Address 1 line and you can see that it is 1 of 2 address values indicating that there is an Address 2 line.

NAE-Name and Address Entry

Whitty, Ms. Elizabeth A. ID: 9000186 SSN: 111-22-3333  
 Ottawa IL 61350 Home: 815-433-1234

Prefix Ms. Person ID 9000186  
 Name LFM Whitty Elizabeth Anne  
 Suffix  
 Address 1 1234 Mockingbird Ln  
 City/St/Zp/Cnty Ottawa IL 61350 IL099 La Salle  
 Res Cnty/State  
 Country  
 Phone/Ext/Ty 1 815-433-1234 HO Home / Permanen  
 Origin/Date  
 SSN 111-22-3333  
 Birth Date 05/26/1981  
 Ethnic/Gender 6 White, Non-Hispanic F  
 Mail Codes 1 NP No Phone Calls  
 E-Mail Address(es) 1 PRI bethwhitty@augustana.edu  
 Pref Name Beth Whitty  
 Mail Name 1 Beth Whitty

Controller Address Value 1/2

**PO Box vs. Street Address**

- ✓ Do not put punctuation in PO Box.

Suffix  
 Address 1 PO Box 712  
 City/St/Zp/Cnty Fairfax VA 22022

- ✓ Always enter both the PO Box (on Address line 1) and street (on Address line 2) if they are both provided.

Suffix  
 Address 2 90021 Oak St  
 City/St/Zp/Cnty Fairfax VA 22022

## City, State, Zip

- ✓ Enter the Zip code in the city field, then tab. The Zip Translation table will insert the city, state, and zip code.
- ✓ Confirm the city and state are correct if they automatically populate
- ✓ If the Zip code entered is not in the translation table, the City, State, Zip fields would need to be entered using the two-digit State code. See *Appendix B*. (Assure the accuracy of your entry --If not correct, this bad information will populate all records with the same Zip code in Colleague!)
- ✓ Zip codes may be entered as 5 or 9 digits.
- ✓ You can enter the Zip code with or without the hyphen. As you tab out of the field, a hyphen will be placed in the 9-digit Zip code if you did not enter it.

## County Code

- ✓ County codes are loaded into Colleague.
- ✓ Enter “...” in the Cnty field to get a complete list of codes.

## Country Code

- ✓ The country code **must** be left blank for all US addresses.
- ✓ Enter “...” in the Country field to get a complete list of codes.

## Canadian Addresses

- ✓ Canadian addresses should be entered using only the address, city, state (province), Zip (postal) code, and country.

Address	1	1010 Clear St		
Ct/St/Zp/Cnty		Ottawa	ON	K1A 0B1
Res Cnty/State				
Country	CA	CANADA		Sou

## International Addresses

- ✓ International addresses should be entered using only the address, city, and country fields.
- ✓ Enter “...” to get a complete list of codes.
- ✓ **DO NOT** use state and Zip fields.
- ✓ Follow the addressing standards for that country as indicated on the document received from the person.
- ✓ **DO NOT** enter country in the city and state fields. Use the country field for this purpose – it **must** be used on all international addresses.
- ✓ International Zip codes should be entered in the city field after the city.  
State = <blank> Zip = <blank>

Address	1	47 Kensington Rd		
Ct/St/Zp/Cnty		London W8 6QA		
Res Cnty/State				
Country	UK	UNITED KINGDOM		Source 1

## Military Addresses

Overseas military addresses must contain the APO or FPO designation along with a two-character “state” abbreviation of AE (armed forces in Europe, the Middle East, Africa, and Canada), AP (Pacific), or AA (Americas excluding Canada) and the Zip Code or Zip+4 code.

Ct/St/Zp/Cnty	APO	AE	09001-5275
---------------	-----	----	------------

Domestic locations should use the approved city name along with the two-character state abbreviation and the Zip Code or Zip+4 code.

Ct/St/Zp/Cnty	Minot AFB	ND	58705-1253
---------------	-----------	----	------------

## Phone Numbers

- ✓ U.S. phone numbers should be entered with an area code.
- ✓ U.S. phone numbers should be entered without hyphens and will automatically be formatted with hyphens if they are 10 digits.
- ✓ Since multiple phone numbers of any type (Home, Business, etc.) can be entered, the primary one should always appear first on the list.
- ✓ Unpublished phone numbers should be entered with the area code and remaining digits filled with zeros. (e.g. 309-000-0000)
- ✓ Foreign numbers should be entered exactly as they are received including hyphens and spaces.
- ✓ Extensions for any phone type can be entered in the Ext field to the right of the phone number and the left of the phone type.
- ✓ Do not leave phone type field blank. A phone type must be entered for each phone number in order for it to display for reference or on reports. If you are not sure what type of phone number you have enter it into the Home/Primary phone type.
- ✓ These are the phone types used by Augustana College:

<b>BO</b>	<b>Business/Organization</b>
<b>CP</b>	<b>Cell Phone</b>
<b>FH</b>	<b>Fax Home</b>
<b>HO</b>	<b>Home / Primary</b>
<b>CO</b>	<b>Campus Office</b>
<b>FB</b>	<b>Business Fax</b>
<b>EM</b>	<b>Emergency Phone</b>
<b>OC</b>	<b>Off Campus</b>

## **Personal Information Change Procedures**

### **Population of and Changes to Social Security Numbers for Students**

- ✓ SSN will be populated in Colleague through FAFSA process and confirmed with SSA system through Financial Aid Office. This captures approximately 75% of our students.
- ✓ Prior to the Move-to-Student, populating this field or changing errors will be done confirmed by Admissions/Financial Aid.
- ✓ During summer First Year registration, the Business Office will collect SSN information in person by viewing original SS card for employment purposes (note: some students will provide passport instead.) This will capture another “chunk” of students.
- ✓ Following this, ITS will work with Business Office to generate a report of those registered students who have SSN field missing on Colleague and these students will be contacted about providing the information for our reporting requirements by the Business Office (excluding international students.)
- ✓ For those students who do not have a SSN in Colleague and have completed documented paperwork in the Student Payroll Office, the Student Payroll Office will provide the Registrar's Office with the SSN to enter into Colleague.
- ✓ For those students who have a SSN in Colleague, but have not filed a FAFSA, Student Payroll will contact the student to inform the student of the discrepancy and determine the correct number if Student Payroll has not viewed documents (only had passport). If Student Payroll has viewed the SSN, Student Payroll will provide the Registrar's Office with the correct number.
- ✓ If FAFSA is received after Move-to-Student, F.A. will continue to populate Colleague through the FAFSA process if there is a SSA match.
- ✓ In all other cases, changes/additions to SSN after the Move-to-Student, will be processed by the Office of the Registrar. That process will be:
  - Have student complete and sign the change of demographic form
  - Staff member must view original SSN card and initial form that card was viewed. If blank on system-update from SSN card. Process complete.
  - If SYSTEM DOES NOT MATCH SSN CARD then call FA. Staff member calls Financial Aid Office see if FAFSA on file and SSA match took place.
    - if NO FAFSA on file-update with number of SSN Card
    - if FAFSA on file and there was a SSA match through the FAFSA process-F.A. needs a copy of the SSN card and will handle the issue going forward

- If accurate match can be determined, change/addition will be made on NAE
  - (If it is not a match, FA Office will handle the issue going forward.)
- Form signed and dated by staff member and filed in the student record.

NOTE: Any changes to SSN for employees needs to be processed in the Human Resources Office.

## Householding

“Householding” links addresses that match in the same address file.

Householding saves space because if 2 or more people share an address, you only keep 1 copy in the database. Likewise, changes to that address affect all residents so this should save staff time updating addresses. In the example below, Fred Flintstone is entered on NAE.

The screenshot shows the 'NAE-Name and Address Entry' form. At the top, it displays 'Flintstone, Mr. Fred' with ID '9000188' and 'Stonetown IL'. Below this, there are several input fields: 'Prefix' (Mr.), 'Name LFM' (Flintstone), 'Suffix', 'Address' (1 77 Bedrock Cir), 'City/St/Zp/Cnty' (Stonetown IL 60000), and 'Res Cnty/State'. A 'Person ID' field contains '9000188' and an 'Addnl Info' button is visible.

Colleague will look for any matching records to her address after saving out of the NAE screen. If any matches are found, the Address Resolution screen appears. Wilma’s address matches Fred Flintstone’s address.

The screenshot shows the 'Address Resolution' screen. It has a title bar with 'NAE-Name and Address Entry' and 'BIO-Biographic Information'. The main area is titled 'ADDRESS RESOLUTION using ADDRESS, View: ADDRESS'. Below this is a table with columns: 'Seq: Address Lines', 'Status', 'Residents', and 'Type'. One row is checked and highlighted, showing '1- 77 Bedrock Cir' and 'Mrs. Wilma Flintstone Home/Perma'. A callout box points to the 'Residents' column with the text: 'To household, select here and then SAVE.'

 Do not household international students (necessary for successful reporting to the U.S. Federal government.)

There are two options to take:

1. To not household, click on the SAVE disc or type “A” at the bottom of the form to add Wilma’s address as a separate address record.
2. To household the new person with one of the records displayed, select the address record shown and then click the SAVE disc.

Householding has implications for address changes. See section entitled: “Address Changes when Householding in Effect.”

 You can not household someone that has already been householded

## Person Address Changes

- ✓ Each office will need to identify the people within their department who have the authority to make name, address, phone, and Social Security # modifications.
- ✓ Each office will need to refer to *Appendix D* to determine documentation requirements for making various demographic changes. Caution should be taken to check whether person is an employee or student since specific legal documentation may be required in those cases.
- ✓ Requests made in person or via the phone should be documented on the Augustana Official Information Change Form for an Individual (“Change Form” - Refer to *Appendix E*).
- ✓ Reference the “Where Used” field on the resolution screen. If the Data Owner is your office, fill out the Change Form and pass the change onto the data entry custodian. If the Data Owner is an office other than your own, fill out the Change Form and forward it to the appropriate office for handling by their data custodian.

NAE-Name and Address Entry | BIO-Biographic Information

PERSON Lookup Screen  
using PERSON, View: Combined

Seq:	Name	Address	SSN
	ID, Status (Reunion Class)		Entry Date
	Source	(Birth Name) Where Used	Birth Date
<input type="checkbox"/>	1: Fisher, C. Ed	4375 Fairlakes Ct	
	0000420	Fairfax, VA 22033	10/29/01
	STA - Staf	STA	
<input type="checkbox"/>	2: Fisher, Fran	90021 Oak St Apt 242	126-75-3122
	0000254	Fairfax, VA 22033	10/08/01
	STU - Stud (Johnson)	APP, CON, MAI, PER, STU, FIN	10/11/83
<input type="checkbox"/>	3: Fisher, Freddy	90021 Oak St Apt 242	
	0000334	Fairfax, VA 22022	10/18/01
	SPO - Spou (Johnson)	MAI, APP	05/06/52
<input type="checkbox"/>	4: Fisher, Joseph E	4375 Fairlakes Ct	
	0000416	Fairfax, VA 22033	10/29/01
	STA - Staf	STA	

Controller LookUp Resolution Page 1/2  
Seq Number, (F)lag, (V)iew, (S)ort/Select, (A)dd:

See Appendix G for Definitions for “Where Used” Codes

- ✓ In order to prevent the creation of duplicate records, be sure that exact procedures are followed for the Name/Address search (pages 11-12) prior to modifying a record in Colleague. Research – research – research!

 **STOP**

In order to **save** your changes, you must **save** all the way out of a record. If you are on a detail screen, you need to **save** the detail screen and then **save** the screen from which you detailed.

Click  to **cancel** the change you made.

There are two preferred methods to maintain and/or make changes to addresses:

1. The recommended workflow is to begin at the Address Summary (ADSU) screen. This screen displays all current address records as well as any former address records that have been kept as history. When detailing on either the address record (to maintain) or on a blank row (to create a new address), a menu box will appear and either the Person Address (ADR) screen or the Employment Information (EMPL) screen can be selected. Choose the **ADR** screen to edit address information.

NAE-Name and Address Entry | ADSU-Address Summary

Flintstone, Dr. Fred ID: 0001255  
Stonetown IL 60000

Address Lines	Status	Residents	Type
1 77 Bedrock Cir Stonetown, IL 60000	Current	Dr. Fred Flintstone Mrs. Wilma Flintston	Home/Perma
2 75 Bedrock Cir Stonetown, IL 60000	Former	Dr. Fred Flintstone Mrs. Wilma Flintston	Home/Perma
3			

Select one to  
DETAIL.

 It is recommended to make address additions and/or changes using either the **ADSU** or **ADR** screen. (The **NAE** screen is not recommended for this purpose.)

2. Another option of adding and/or changing addresses is to go directly to the **ADR** screen.

NAE-Name and Address Entry | ADSU-Address Summary | ADR-Person Addresses

Flintstone, Dr. Fred ID: 0001255  
Stonetown IL 60000

Address 1 77 Bedrock Cir Eff. Start 02/23/06  
2  
Modifier  
Ct/St/Zp Stonetown IL 60000 Eff. End  
Status C Current  
Country  
County  
Type 1 H Home/Permanent Seasonal Date(s)  
2  
Mail Pref Yes Route Code  
Pref Res Yes Time Zone

Once the LookUp is completed for the person, a resolution screen is displayed with all address records for the person. A record can be selected to change or “A” can be entered at the bottom of the screen to add a new address record.


 When changing an address always make certain that you check the status of the invalid address on the **ADSU** screen. Most individuals should only have one current address for each address type.

ADR-Person Addresses    ADR-Person Addresses

PERSON Lookup Screen  
using PERSON, View: Combined

Seq:	Name	Address	SSN
ID, Status (Reunion Class)			Entry Date
Source (Birth Name)	Where Used		Birth Date
1:	Flintstone, Fred	77 Bedrock Cir	
	0001255	Stonetown, IL 60000	02/20/06
		PER	02/14/60
2:	Flintstone, Pebbles	77 Bedrock Cir	
	0001259	Stonetown, IL 60000	02/20/06
	STU - Stud	PER	04/10/85
3:	Flintstone, Wilma	77 Bedrock Cir	
	0001258	Stonetown, IL 60000	02/20/06
		PER	

Select here to change current address.

- or enter "A" to add a new address.

Controller LookUp Resolution    Page 1/1  
 Seq Number, (F)lag, (V)iew, (S)ort/Select, (A)dd:

Click to open the record

**Address Statuses:**

- ✓ **Current** – This is the default status even if it is not selected.
- ✓ **Former** – This will happen automatically when you enter the new address over the old address and then select “yes” when asking whether to save history.
- ✓ **Last Known** – This address would be used when mail is returned on the current address. We do not want to lose the data from the current address, but it is really not the former address either. Once a new address has been determined, the Last Known address should be changed to Former.
- ✓ **Pending** – This is for an address that we have received information on, but know that it is not valid until a future date. (e.g. Susan Johnson is moving on 7/4/07. Enter this as a (H)ome address with an effective start date of 7/4/07 on the **ADR** screen.

## Address Changes when Householding in Effect

If there are other people who share the address you have changed, you will be taken to the Address Move (ADRM) screen.

The screenshot shows the 'ADRM-Address Move' screen. At the top, there are tabs for 'ADSU-Address Summary', 'ADR-Person Addresses', and 'ADRM-Address Move'. The main header is blue and contains the text 'Household Move' and 'Fisher, Mrs. Fran ID: 0000254 SSN: 126-75-3122 Student Fairfax VA 22022'. Below this, there are two columns for 'New Address' and 'Old Address', both containing '90021 Oak St Apt 244' and 'Fairfax VA, 22022'. At the bottom, there is a table titled 'Current Residents' with columns for 'Updt', 'Hist', 'Type', 'ID', 'Name of Individual', and 'Relation'. The first row shows 'Mrs. Fran Fisher' with 'Updt' set to 'Y' and 'Hist' set to 'Yes'. The second row shows 'Mr. Freddy Fisher' with 'Updt' set to 'N' and 'Hist' set to 'No'. The 'Updt' and 'Hist' columns are circled in red.

Updt	Hist	Type	ID	Name of Individual	Relation
Y	Yes	H	0000254	Mrs. Fran Fisher	
N	No	H	0000334	Mr. Freddy Fisher	

Controller Current Residents Value 1/2

- ✓ Change the Updt from [N] to [Y] for those people whose address will also be changing. Change only the address of those you know requires an address change. Be careful not to change unrelated parties or relatives who really are not moving (e.g. If you are changing an address for a graduate, be sure you do not change the address for the parents also if they really are not moving.)
- ✓ Change the Hist flag from [N] to [Y] for those whose Updt field was also changed. This will allow address history to be kept on their record, too.
- ✓ Either save all the way out of the record (back to the LookUp screen) to keep the changes you made or cancel if you decide you really did not want to keep changes.

## Person Name Changes

The Biographic Information (**BIO**) screen can be used to record additional data for a person. A majority of the data on this form will default from the data entered on the **NAE** screen.

NAE-Name and Address Entry

Flintstone, Mr. Fred ID: 9000188  
Stonetown IL

Prefix Mr. Name LFM Flintstone Suffix Fred Addnl Info

Address 1 77 Bedrock Cir City/St/Zp/Cnty Stonetown IL 60000 Res Cnty/State

It is recommended that name changes be performed on the **BIO** screen so that the previous name is stored in the appropriate field.

When making a name change, simply enter the new name in the LFM fields. Colleague will prompt the user to determine if this is truly a name change.

Alert

Is this a Name Change (Y/N)

Y N

If it is, select (Y)es. If it is merely a correction in spelling, then select (N)o as no history needs to be stored.

Colleague will then prompt the user for whether it is a Birth Name change or Other Name change. Both fields can be used during LookUps.

Alert

Is this a (B)irth or a (O)ther name change

B O

- ✓ If (B)irth selected, Colleague will store the original name in the Birth name field (maiden name).
  - The Birth Name appears in parenthesis in the Person Resolution Screen when performing a LookUp for a person. This can be beneficial in preventing duplicates.
  - Since it is a single-valued field, there can only be one birth name stored in Colleague.

If (O)ther selected, Colleague will store the original name in the Other name field.

When a person's name is changed because of marriage, divorce or other legal changes, a LookUp can be done using the birth name if a history of the name is kept.

- The Other name field is multivalued and can store any number of other names the person may have. (However, it cannot be easily pulled from for mailings or other viewing because there is no order in the listing of them on the **BIO** screen.)

## Address Change Sources

The **NAE** screen will require you to enter a source code for address changes. This message will appear if you make an address change and try to save the record without selecting a source code from the pull-down address change source field:



These are the address change source codes used by Augustana:

<b>ADDRESS.CHANGE.SOURCES</b>	<b>PO</b>	<b><i>Post Office</i></b>
	<b>AP</b>	<b><i>Application</i></b>
	<b>CH</b>	<b><i>Change of Address Form</i></b>
	<b>CO</b>	<b><i>Correction</i></b>
	<b>PH</b>	<b><i>By Phone</i></b>
	<b>WB</b>	<b><i>Web Search</i></b>
	<b>SV</b>	<b><i>Staff/Volunteer/Family Member</i></b>
	<b>EM</b>	<b><i>Email</i></b>

## Tracking Deaths

Information should be handled by the appropriate office (refer to *Appendix D*):

- ✓ Human Resources for employees
- ✓ Records Office for current students
- ✓ Development for alumni & friends of the college
- ✓ Admissions for prospects and applicants.

Follow these steps to flag someone as deceased:

1. Go to the **NAE** screen
2. Under the Mail Code choose **DE Deceased**. This will eliminate mailings to this person.
3. Save and Update.

NAE-Name and Address Entry

Morgan, Matthew J. ID: 0091191  
Ottawa IL 61350 Home: 815-444-3333

Prefix [ ] Person ID 0091191  
Name LFM Morgan Matthew John  
Suffix [ ] Addnl Info [ ]  
Address 1 123 Catherine St  
Ct/St/Zp/Cnty Ottawa IL 61350 IL099 La Salle  
Res Cnty/State [ ]  
Country [ ] Source 1 [ ]  
Phone/Ext/Ty 1 815-444-3333  
Origin/Date [ ]  
SSN [ ] Address Change  
Birth Date 12/14/1981 Source [ ]  
Ethnic/Gender C Caucasian M Date [ ]  
Mail Codes 1 DE Deceased By BETHWHITT  
E-Mail Address(es) [ ]  
1 AUG MatthewJ.Morgan@augustana.edu Preferred Y  
Pref Name Matt  
Mail Name 1 Matt

Element E-Mail Address(es) Value 1/1

4. Detail to the **BIO** screen by clicking on the  next to the Addnl Info field and then choosing **BIO** from the list.
5. Change the Status to U for Unverified Death. (Note: Do not change to Deceased unless you have a death certificate or confirmation -- obituary from a newspaper, etc.)

NAE-Name and Address Entry BIO-Biographic Information

Morgan, Matthew J. ID: 0091191  
Ottawa IL 61350 Home: 815-444-3333

Source 1 [ ] ID 0091191  
Origin/Dt [ ]  
Prefix [ ]  
Name LFM Morgan Matthew John  
Suffix [ ]  
Pref Name Matt  
Mail Name 1 Matt  
Nickname [ ]  
Birth LFM [ ]  
Other LFM 1 [ ]  
Birthplace [ ]

Status U Unverified Gender M Birth Date 12/14/1981  
SSN [ ] Ethnic C Deceased Date [ ]  
Mar Stat [ ] Privacy [ ] Entry Date 12/08/06  
Citizen [ ] Dircty [ ] Last Changed 12/08/06

Once you have verification that the person is deceased:

1. Go the **DEC** screen using this method:
  - a. Click on **Apps** from the Menu Bar
  - b. Choose **ST** or **HR** (depending if this is a student or employee)
  - c. Expand the **DM – Demographics folder**
  - d. Double click on **DEC**
2. Change the status to **D for Deceased** and enter the **Deceased Date** plus any other information you got from the **Verification Source**.
3. Save and Update

DEC-Deceasing

Morgan, Matthew J. ID: 0091191  
Ottawa IL 61350 Home: 815-444-3333

Status: **D Deceased**  
Notification Date: 12/08/06 Unverified Date: [ ]

Verified Deceased Date: 12/08/2006 Estate: [ ]  
Verification Date: 12/08/06 Memorial Type: [ ]  
Verified By: 0039134 WHIT.E - E. Weber  
Verification Source: N Newspaper  
Verification Source Person: [ ]

Relations  Next of Kin Relationship Condolence Document Code

1	[ ]	[ ]	[ ]
2	[ ]	[ ]	[ ]

Remarks: [ ]  
Clippings: 1 [ ]  
Comments: 1 [ ]

Person LookUp

4. It will prompt you to run a report. Select **H Hold/Browse File Output**.

DEC-Deceasing DEC-Deceasing

Peripheral: SETPTR.BETHWHITTY.5 Description:  
Process: DEC Description:

Output Device: **H Hold/Browse File Output** [ ]

Printer: [ ]  
Form Name: [ ]  
Banner: [ ]  
Security: PB Public [ ]  
Copies: 1 [ ]  
Defer Time: [ ]

Other Options

1	NHEAD	[ ]
2	[ ]	[ ]
3	[ ]	[ ]

Page Width: [ ]  
Page Length: [ ]  
Top Margin: [ ]  
Bottom Margin: [ ]

5. Save and Update

Once you “decease” someone, their addresses and employment become former. Their relationships become widow, etc.

6. Select "N".

The screenshot shows a window titled "DEC-Deceasing" with a blue header bar. The header contains the text "Job Description...: Deceasing" and "Job Statistics ID: DEC\_BETHWHITTY\_57616\_14222". Below the header, there is a section with a label "Execute in Background mode?" and a text input field containing the letter "N". This input field is circled in black. Below this is a "Background Execution Type" dropdown menu. Further down, there are several scheduling options, each with a text input field and a calendar icon: "Schedule Process to Run Next on", "Schedule Process to Run Every", "Schedule Process on Weekdays only", "Schedule Process to Start After", and "Stop Automatically Scheduling Process on".

7. Save and Update

8. Click **Finish**

The screenshot shows a window titled "Deceased Person Report - CA". The window displays the following information: "Started 16:09:41 Dec 08 2006", "Current 16:09:45", "Total Elapsed 00:00:04", "Est. Completion 16:09:45 Dec 08 2006", and "Ended 16:09:45 Dec 08 2006". Below this is a progress bar labeled "Processed 1 of 1" which is filled with blue segments. At the bottom of the window, there is a checkbox labeled "Close automatically when complete" which is unchecked, and a button labeled "Finish". A scrollable text area at the bottom contains the text "Click FINISH to complete...".

9. A report will show. Print the report and close the window.

# Person Relationships

Colleague provides the functionality to indicate a relationship of one person to another. In this way, a spouse, parents, children, and/or siblings of one person can be associated to another. When a person is added to the database as a relationship to the primary person, each person will have a record and will be assigned a unique ID number.

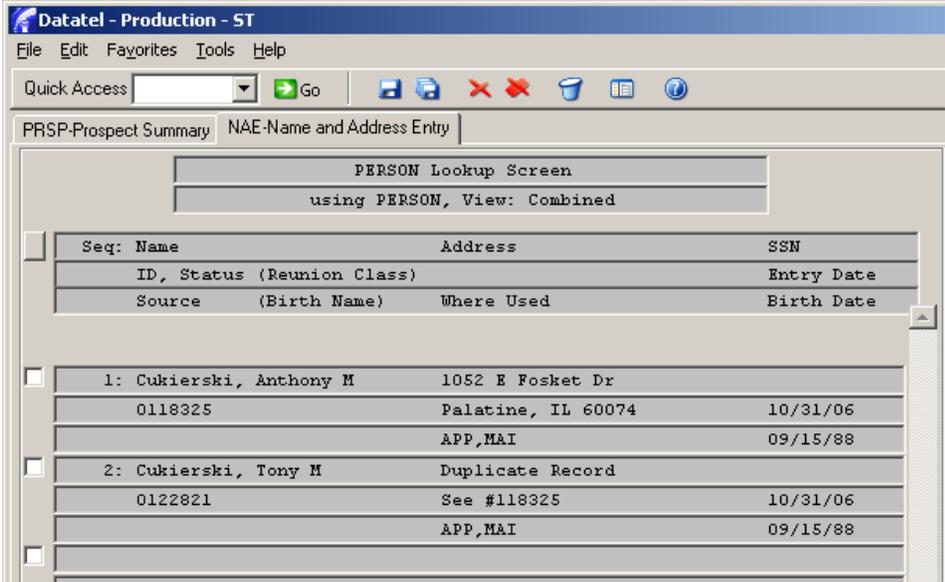
There are two primary screens to use to record one person's relationship to another: the Relation Information (**REL**) screen is used to record any type of relationship to another person. The Spouse Information (**SPO**) screen is used to record spouse relationships exclusively. These screens are in the CORE application, but because only select offices will have authority to enter this information, they will be explained in more detail in the manuals for the appropriate offices.

## Duplicate Record Procedures

1. Remove the SS#, address, phone# and e-mail address from the NAE screen. That way if correspondence generates, it cannot be sent!
2. Remove the entry term from the [Admissions] PRSP screen.
3. Insert the following messages:

Mark "duplicate record" in the street address field.  
 Enter "See #118325" (good Colleague ID) in the city field.

This way, you can clearly see which one is the duplicate record, and by utilizing SEE #..... in the city field, it displays the good alternate # on both the resolution screen and in the header of the record for ITS and other super users who can access these locked records.



## Organizations and Institutions

### Minimum Entry Required to Create a New Record

Required fields include:

- ✓ Organization or institution name
- ✓ Commonly known versions of the Corporation name in the Other Name field
- ✓ Street Address
- ✓ City
- ✓ State
- ✓ Zip Code
- ✓ Address type

Fields that must be entered when the information is available include:

- ✓ Phone number with phone type
- ✓ Current and past variations of the organization or institution name

Organizations include business (corporate) entities, foundations, and associations. Institutions include high schools, colleges, and universities – academic institutions.

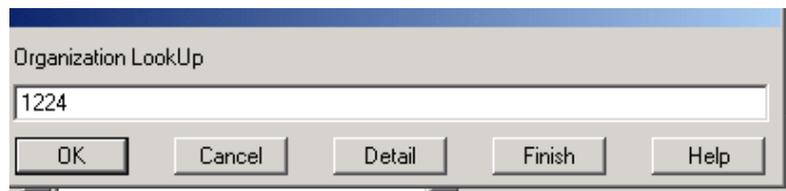
### Organization and Institution Search Procedures

These procedures are for all Colleague users to follow when performing name searches to prevent duplicate records from being created. If at any time you discover that the organization or institution exists, but was entered using an incorrect spelling, a shortened name, former name, or only with initials, you should fill out a change form (*Appendix F*) and send it to the person in your office that has access to change a record.

If you are searching for an existing Organization or Institution, you should always use the Colleague ID when it's available.

### Search by Existing Colleague ID (Preferred Method)

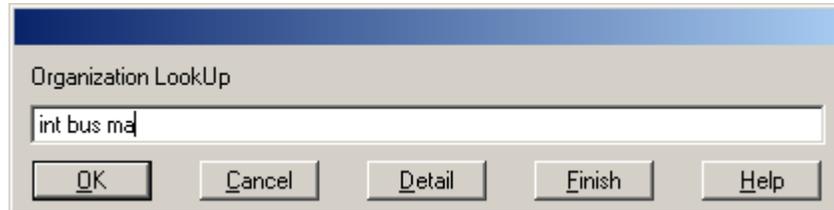
1. Select the **ORGP** screen
2. Enter the number into the Look Up dialog box (leading zeros not required)
3. Click OK (e.g. to search for Hershey Chocolate with Colleague ID 0001224, you would enter 1224 in the Look-Up box and click OK).



Otherwise, the following searches **must** be done prior to creating a new record. They are Best Practice procedures, in recommended order.

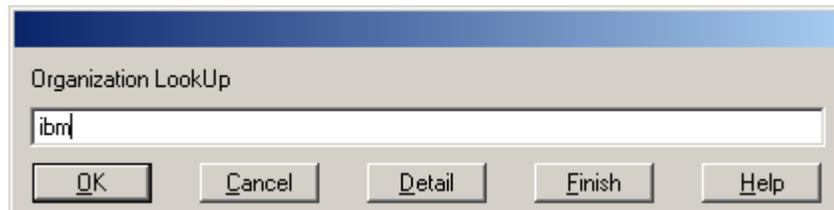
### Search by Partial Name

1. Select the **ORGP** screen
2. Enter part of the name into the Look Up dialog box
3. Click OK



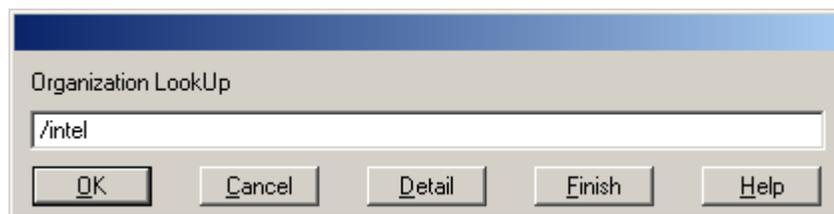
### Search Using Different Variations of a Name

1. Select the **ORGP** screen
2. Enter initials, previous name, or variation into the Look Up dialog box
3. Click OK



### Search Using Similar Sounding Names (Soundex)

1. Select the **ORGP** screen
2. Enter "/" followed by similar sounding name into the Look Up dialog box
3. Click OK



NOTE: Remember, it is very important to prevent duplicates –Research – research – research!

### Creating a New Organization or Institution

Only after these searches are complete and it has been determined that the organization or institution does not exist in Colleague may you proceed to add it to the database or to contact the person in your office who has access to add a record.

You will add a new record via the **ORGP** screen for Organizations and via the **INST** screen for Institutions.

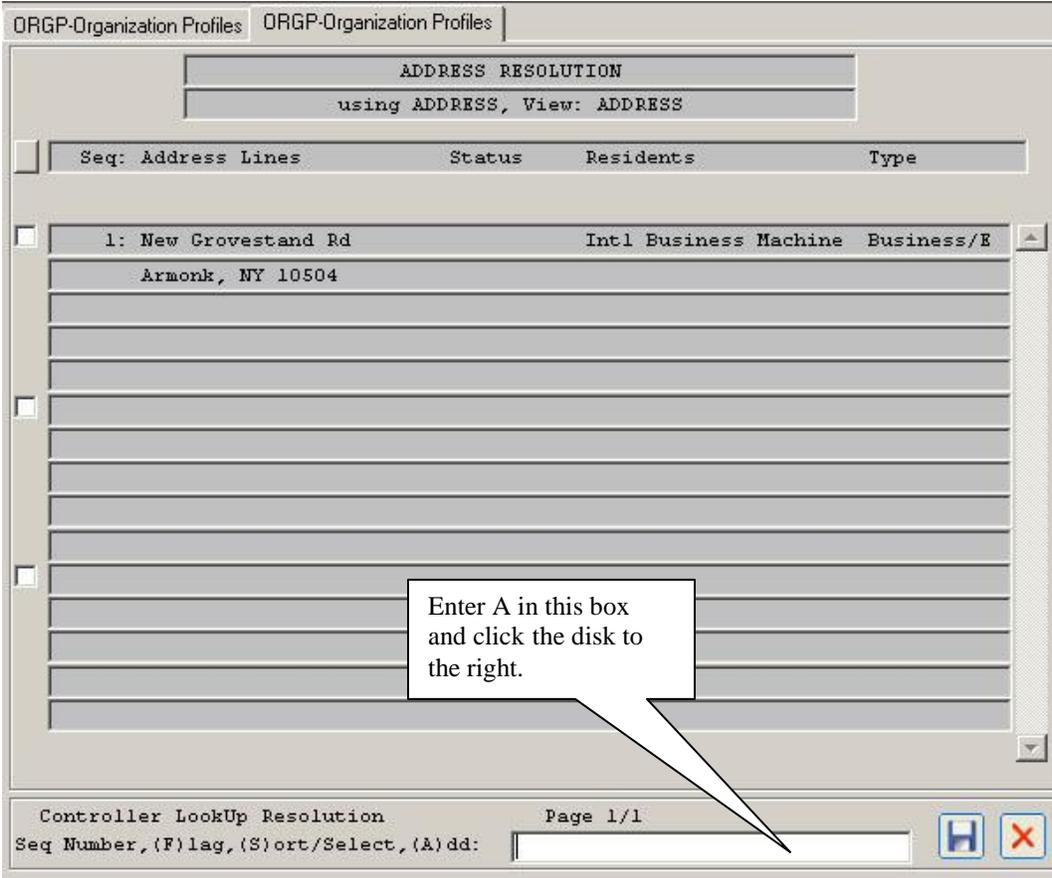
If you do not get a resolution screen with a list of possibilities, this prompt will appear:



Click Add. Colleague will automatically assign a new number to the Organization or Institution.

If you get a resolution screen with possible matches, but you are looking for something else:

1. Type (A)dd in the box at the bottom of the screen
2. Click on the disk. Colleague will automatically assign a new number to the Organization or Institution.



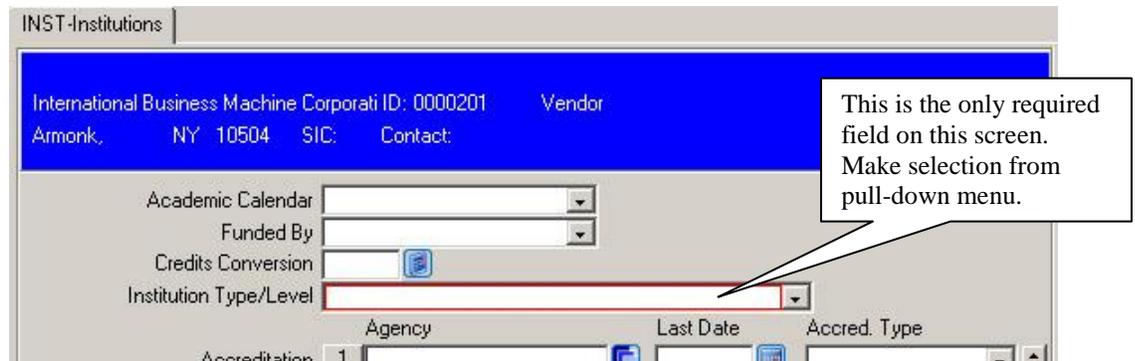
If you are creating an Organization, you will get the following screen after choosing Add.



Once you save out of this screen, you will see this dialog box:



Choose "Update" and you will return to the INST screen.



## Organization and Institution Name Standard

Organization or institution names will be spelled as they appear on the letterhead or correspondence, with the exception of punctuation. Only periods, apostrophes, commas, and hyphens should be used; any other punctuation from the correspondence (e.g. parentheses, quotes, etc.) should be omitted.

- ✓ Acceptable
  - St. Anthony's Continuing Care Center
  - Dewey, Cheatham, & Howe
  - Anderson-Erickson Dairy
- ✓ Not Acceptable
  - Trinity (Iowa Health System)
  - Whitey's "Best in the Midwest"

### The Use of "And"

- ✓ "And should always be entered as "&"

### The Use of Abbreviations

- ✓ Office, advertising, corporation, high school, incorporated, etc., should be spelled out unless space is limited. Colleague may automatically abbreviate some of the title. Make sure that you use the equal sign (=) in front of the name to prevent the abbreviation. If you need to abbreviate, start with the word at the far right and move left.

Example: Anderson, Johnson, and Peterson Advertising  
Anderson, Johnson, & Peterson Adv.

## The Use of Initials

- ✓ Organization or institution names containing initials should not be entered with periods.

The screenshot shows the 'ORGP-Organization Profiles' window. The header bar is blue and contains the text 'PJ's Pub' and 'ID: 0001227'. Below the header, there are fields for 'SIC:' and 'Contact:'. The main form area has several input fields: 'Source' with a dropdown set to '1', 'EIN' with an empty text box, 'Origin/Dt' with a dropdown and a calendar icon, 'Addnl Info' with a folder icon, 'Name' with a dropdown set to '1' and the text 'PJ's Pub', 'Mail Label' with a dropdown set to '1' and the text 'PJ's Pub', 'Other Name' with a dropdown set to '1' and an empty text box, and 'Sort Name' with the text 'PJ'S PUB' highlighted in red.

## More Than One Name

- ✓ If an organization or institution is or was commonly known by more than one name, enter additional names in the "Other Name" field on the **AORG** screen. This is essential when using Look Up to prevent duplicates.

The screenshot shows the 'ORGP-Organization Profiles' window. The header bar is blue and contains the text 'International Business Machine Corporation ID: 0000201 Vendor' and 'Armonk, NY 10504 SIC: Contact:'. The main form area has several input fields: 'Source' with a dropdown set to '1' and the text 'VEN', 'EIN' with an empty text box, 'Origin/Dt' with a dropdown and a calendar icon, 'Addnl Info' with a folder icon, 'Name' with a dropdown set to '1' and the text 'International Business Machine Corporation', 'Mail Label' with a dropdown set to '1' and the text 'International Business Machine Corp', 'Other Name' with a dropdown set to '1' and the text 'IBM', and 'Sort Name' with the text 'INTERNATIONAL BUSINESS MACHINE' highlighted in red.

- ✓ Casing standards will be enforced to the extent possible by system rules. All names should be stored in upper/lower case format unless there is specific reference to the contrary, such as corporate letterhead.
- ✓ To override standard casing rules, begin the field with an equal sign (=) and enter the field just as you want it to appear.
  - Enter IBM (displays as Ibm)
  - Enter =IBM (displays as IBM)

## Organization/Institution Change Procedures

### Name/Address Change Procedures



Organizations and institutions are entered and changes maintained on **ORGP**.

All organizations and institutions are defined on the Organization Profile (**ORGP**) screen. Any demographic changes, such as address changes, will also be made here.

- ✓ Each office will need to identify the people within their department who have the authority to make name, address, and phone # modifications for organizations and institutions.
- ✓ Requests made should be documented on Augustana Official Information Change Form for an Organization (“Change Form” - Refer to *Appendix F*).
- ✓ Reference the “Where Used” field on the resolution screen. If the Data Owner is your office, fill out the Change Form and pass the change onto the data entry custodian. If the Data Owner is an office other than your own, fill out the Change Form and forward it to the appropriate office for handling by their data custodian.
- ✓ In order to prevent the creation of duplicate records, be sure that exact procedures are followed for the Name/Address search prior to modifying a record in Colleague.

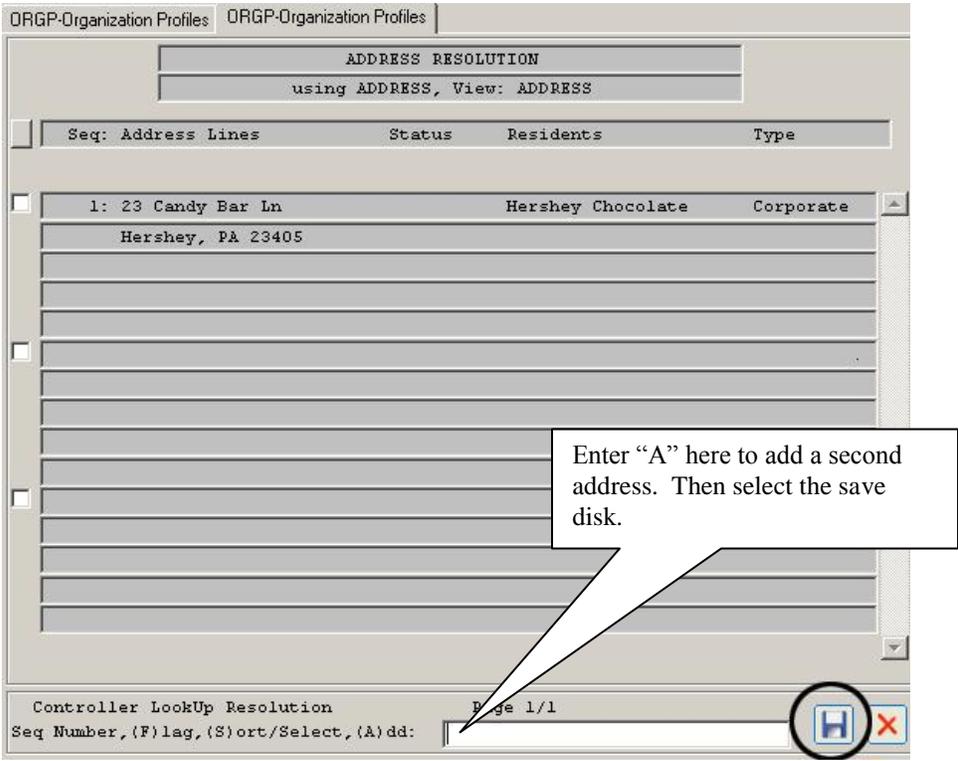


In order to **save** your changes, you must **save** all the way out of a record. If you are on a detail screen, you need to **save** the detail screen and then **save** the screen from which you detailed.

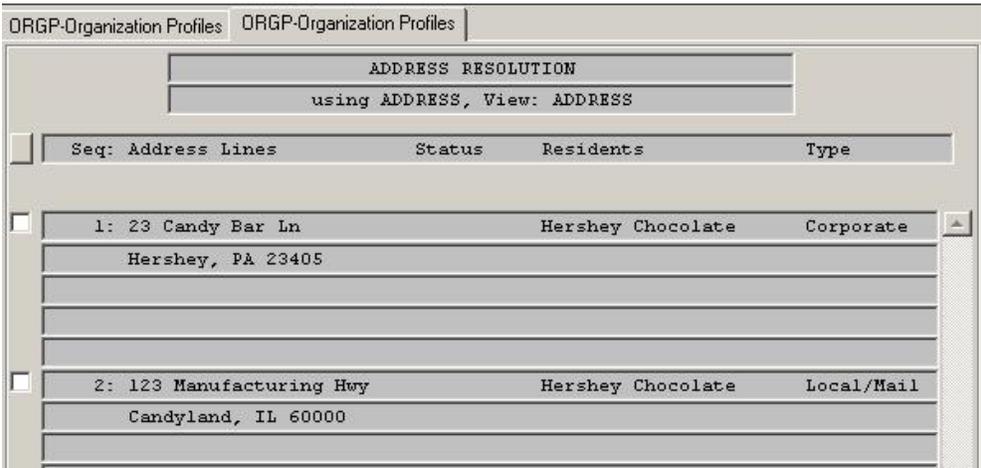
Click  to **cancel** the change you made.

# Adding Another Address

After doing a LookUp on the **ORGP** screen and selecting the desired organization, the address resolution screen will appear.



You will be taken to the **ORGP** screen. Enter another address on the **ORGP** screen and indicate the type of address. Then, whenever you search for this organization, the address resolution screen will appear and it will show all addresses for this organization.



However, multiple addresses will not appear on the same **ORGP** screen. There will be a separate **ORGP** screen for each address. (The address resolution screen

will appear after you do a LookUp. This will allow you to select which location you want. After selection, you will be taken to the appropriate **ORGP** screen.)

## **Family Educational Rights & Privacy Act (FERPA) and Record Security**

Note: For use with FERPA and privacy training. This is not a complete summary of the federal law.

The Family Educational Rights & Privacy Act (FERPA), also known as the Buckley Amendment, can be summarized as:

**“A federal law designed to protect the privacy of education records and to establish the right of students to inspect and review their education records.”**

The Act applies to students enrolled in higher education institutions. A student is any individual who is or has been in attendance at an institution; and regarding whom the institution maintains educational records. The rights primarily reside with the student, regardless of age, once he or she is admitted or enrolls at an institution of higher education.

**Penalties for FERPA Violations-** Violators of the Act can face withdrawal of Federal funding.

### **Conditions for Prior Consent Required to Disclose Information**

An Augustana student shall provide a signed and dated written consent to The Office of the Registrar (or in some cases the Dean of Students) before the College discloses information from the student’s education records. In some cases these forms are completed in the Career Center or in the Athletic department. The written consent must:

- ✓ Specify the records that may be disclosed; State the purpose of the disclosure; and
- ✓ Identify the party or class of parties to whom the disclosure may be made.

### **Under What Conditions is Prior Consent Not Required to Disclose information?**

Augustana may disclose personally identifiable information from an education record of a student without consent if the disclosure meets one or more of the following conditions:

- ✓ The disclosure is to other school officials, including teachers, within the agency or institution whom the agency or institution has determined to have legitimate educational interests.

- ✓ The disclosure is in connection with financial aid for which the student has applied or which the student has received, if the information is necessary for such purposes as to:
  - Determine eligibility for the aid; Determine the amount of the aid; Determine the conditions for the aid; or Enforce the terms and conditions of the aid.
    - “Financial aid” means a payment of funds provided to an individual (or a payment in kind of tangible or intangible property to the individual) that is conditioned on the individual’s attendance at an educational agency or institution.
- ✓ The disclosure is to organizations conducting studies for, or on behalf of, educational agencies or institutions to:
  - Develop, validate, or administer predictive tests; Administer student aid programs; or Improve instruction.
- ✓ The agency or institution may disclose information only if:
  - The study is conducted in a manner that does not permit personal identification of parents and students by individuals other than representatives of the organization; and the information is destroyed when no longer needed for the purposes for which the study was conducted.

**School Official:**

Defined from institution to institution in its annual notification, a school official may be:

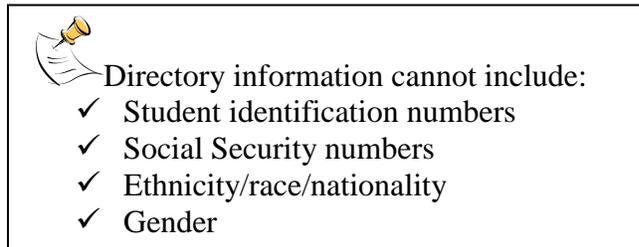
- ✓ An employee of a college (administrative, supervisory, academic, research, or support staff position)
- ✓ A person elected to the Board of Trustees
- ✓ A company or person employed/contracted by a college to perform a special task (i.e., attorney, auditor, or collection agency)
- ✓ A person or student serving on an official committee (i.e., disciplinary/grievance, scholarship) or assisting
- ✓ An official in his/her tasks (i.e., work study students)

**Directory Information:**

Information not generally considered harmful or an invasion of privacy if disclosed. At Augustana the directory information includes, but is not limited to:

- ✓ Name, address, email address, phone numbers, box number of student and parents
- ✓ Field of study and faculty advisor’s name
- ✓ Weight & height of athletes
- ✓ Most recent previous school attended
- ✓ Photographs
- ✓ Date and place of birth
- ✓ Participation in officially recognized activities and sports
- ✓ Dates of attendance, degrees, and awards

Students may request this information be withheld by completing a form in the Registrar's Office.



### **Education Records:**

All records which contain information directly related to a student; and are maintained by Augustana. This term has a very broad scope. Any information which makes a student personally identifiable, such as an ID number or home address, is considered an educational record. Records which fall outside of this definition include:

- ✓ Sole possession records (notes or memos not related to a student)
- ✓ Records created and maintained by a law enforcement unit for a law enforcement purpose
- ✓ Employment records (unless contingent upon attendance)
- ✓ Medical records made and maintained in connection with treatment and disclosed only to individuals providing treatment
- ✓ Records containing information about an individual which is created after he/she is no longer a student at that institution (i.e., alumni records)

### **Record:**

Information maintained in any way—including, but not limited to:

Audio Tape, Computer Media, Film, Handwriting, Microfilm, Microfiche, Print, Video Tape

### **New AIMS Software and Student Educational Records**

The new AIMS software system uses a product called *Colleague*. This software will make the campus function in a more integrated fashion as all offices will work from a central database. While this will make most tasks more efficient, there are FERPA issues that arise from this change. When working with the new screens in Colleague, you will see personal information about students you may not have seen previously. For instance, the Social Security number will appear in the header box of the student record. This type of information can never be released to anyone. An example of one screen appears below.

## Colleague Software NAE (Name and Address Entry) Screen shot:

NAE-Name and Address Entry

Whitty, Ms. Elizabeth A. ID: 9000186 SSN: 111-22-3333 Staff  
Bettendorf IA 52722 Home: 815-433-1234

Prefix Ms Person ID 9000186  
Name L M Whitty Elizabeth Anne  
Suffix  
Address 1 1234 Mockingbird Ln  
City/St/Zp/Cnty Bettendorf IA 52722 IA163  
Res Cnty/State  
Country  
Phone/Ext/Ty 1 563-443-9089 HO Home /  
Origin/Date FR Fundraising Activity 8 Dec 06  
SSN 111-22-3333 Address Change  
Birth Date 6 May 1981 Source  
Ethnic/Gender 6 White, Non-Hispanic F Date 7 Dec 06  
Mail Codes 1 NP No Phone Calls By TRAINING01  
E-Mail Address(es) 1 PRI bethwhitty@augustana.edu  
Pref Name Beth Whitty  
Mail Name 1 Beth Whitty

Controller Mail Name Value 1/1

SS# appears here. Do not release this information.

Augustana ID# will appear up here. Do not release this information.

Race appears here. Do not release this information.

This is another reference number assigned when a record is created. Do not release this information.

Gender appears here. Do not release this information.

## How FERPA Applies to You

The essence of the Act as it applies to you and Augustana is:

- ✓ Your computer screen should not be viewable from windows or office doors if possible.
- ✓ Always log-out of the Colleague software if you leave your work space.
- ✓ Augustana College will not release educational record information without consent, except to those listed as college officials.
- ✓ As a school official, never release non-directory information to anyone.
- ✓ Do not discuss personal information or educational record information about a student with anyone over the phone or via e-mail at any time (including e-mailing of grades.)
- ✓ If parents or other parties become insistent about obtaining this information, please refer them to the Dean of Students Office.
- ✓ Only when the student has signed a written release giving a third party access to their record, is an institution allowed to release information from the student's education record to third parties.
- ✓ If you have printed material which contains non-directory information, be sure it is secured and then destroyed by shredding after use.
- ✓ In addition to FERPA, our own privacy practices prohibit release of private parental information such as income or SS# to third parties (this applies primarily to the Financial Aid Office and Business Office) or release of similar private employee information.

If you have questions about FERPA or legal issues regarding student information, you may contact Evelyn Campbell, Dean of Students (x7533) or Liesl Fowler, Registrar (x7277).

## Appendix A – Standard Casing and Abbreviations

The following is a list of word substitutions. For example, when Avenue is entered, Colleague will automatically replace it with Ave (no period).

<u>Word</u>	<u>Substitute</u>	<u>Word (cont'd)</u>	<u>Substitute (cont'd)</u>
Apartment/Apt.	Apt	Lane	Ln
Avenue/Ave.	Ave	P.O.	PO
Boulevard/Blvd.	Blvd	Parkway/Pkwy.	Pkwy
Building/Bldg.	Bldg	R.R.	RR
Circle/Cir./Cr /Cr.	Cir	Road/Rd.	Rd
Court/Ct.	Ct	Route/Rt./Rte./Rte	Rt
Department/Dept.	Dept	Street/St.	St
Drive/Dr.	Dr	Suite/Ste.	Ste
Highway/Hwy.	Hwy	Terrace/Terr./Terr/Ter.	Ter

The following lists demonstrate how Colleague will handle various items relative to Upper Case. For example, when po is entered, Colleague will automatically replace it with PO; And will be replaced by and; Apt b will be replaced by Apt B; Mcdonald will become McDonald; Smith-jones will become Smith-Jones.

<u>Always</u>	<u>Never</u>	<u>Next Word</u>	<u>Prefixes</u>	<u>Delimiters</u>
ii	a	Apt	Mc	.
iii	an	Box	O'	-
iv	and	Room	D'	/
ne	by	Rm		
nw	for	Ste		
po	in			
rr	of			
se	on			
sw	the			
	to			

The following is a list of words that will not be capitalized. For example, when Th is entered, Colleague will automatically replace it with th (4<sup>Th</sup> will become 4<sup>th</sup>).

<u>Number Suffixes</u>	<b>th</b>	<b>st</b>	<b>nd</b>	<b>rd</b>
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## Appendix B – Geographic Abbreviations

### State/Possession Abbreviations

<u>State/Possession</u>	<u>Abbreviation</u>	<u>State/Possession (cont'd)</u>	<u>Abbreviation (cont'd)</u>
Alabama	AL	Nebraska	NE
Alaska	AK	Nevada	NV
American Samoa	AS	New Hampshire	NH
Arizona	AZ	New Jersey	NJ
Arkansas	AR	New Mexico	NM
California	CA	New York	NY
Colorado	CO	North Carolina	NC
Connecticut	CT	North Dakota	ND
Delaware	DE	Northern Mariana Islands	MP
District of Columbia	DC	Ohio	OH
Federated States of Micronesia	FM	Oklahoma	OK
Florida	FL	Oregon	OR
Georgia	GA	Palau	PW
Guam	GU	Pennsylvania	PA
Hawaii	HI	Puerto Rico	PR
Idaho	ID	Rhode Island	RI
Illinois	IL	South Carolina	SC
Indiana	IN	South Dakota	SD
Iowa	IA	Tennessee	TN
Kansas	KS	Texas	TX
Kentucky	KY	Utah	UT
Louisiana	LA	Vermont	VT
Maine	ME	Virgin Islands	VI
Marshall Islands	MH	Virginia	VA
Maryland	MD	Washington	WA
Massachusetts	MA	West Virginia	WV
Michigan	MI	Wisconsin	WI
Minnesota	MN	Wyoming	WY
Mississippi	MS		
Missouri	MO		
Montana	MT		

## Canadian Province/Territory Abbreviations

<u>Province/Territory</u>	<u>Abbreviation</u>	<u>Province/Territory (cont'd)</u>	<u>Abbreviation (cont'd)</u>
Alberta	AB	Nova Scotia	NS
British Columbia	BC	Ontario	ON
Manitoba	MB	Prince Edward Island	PE
New Brunswick	NB	Quebec	QC
Newfoundland	NF	Saskatchewan	SK
Northwest Territories	NT	Yukon Territory	YT

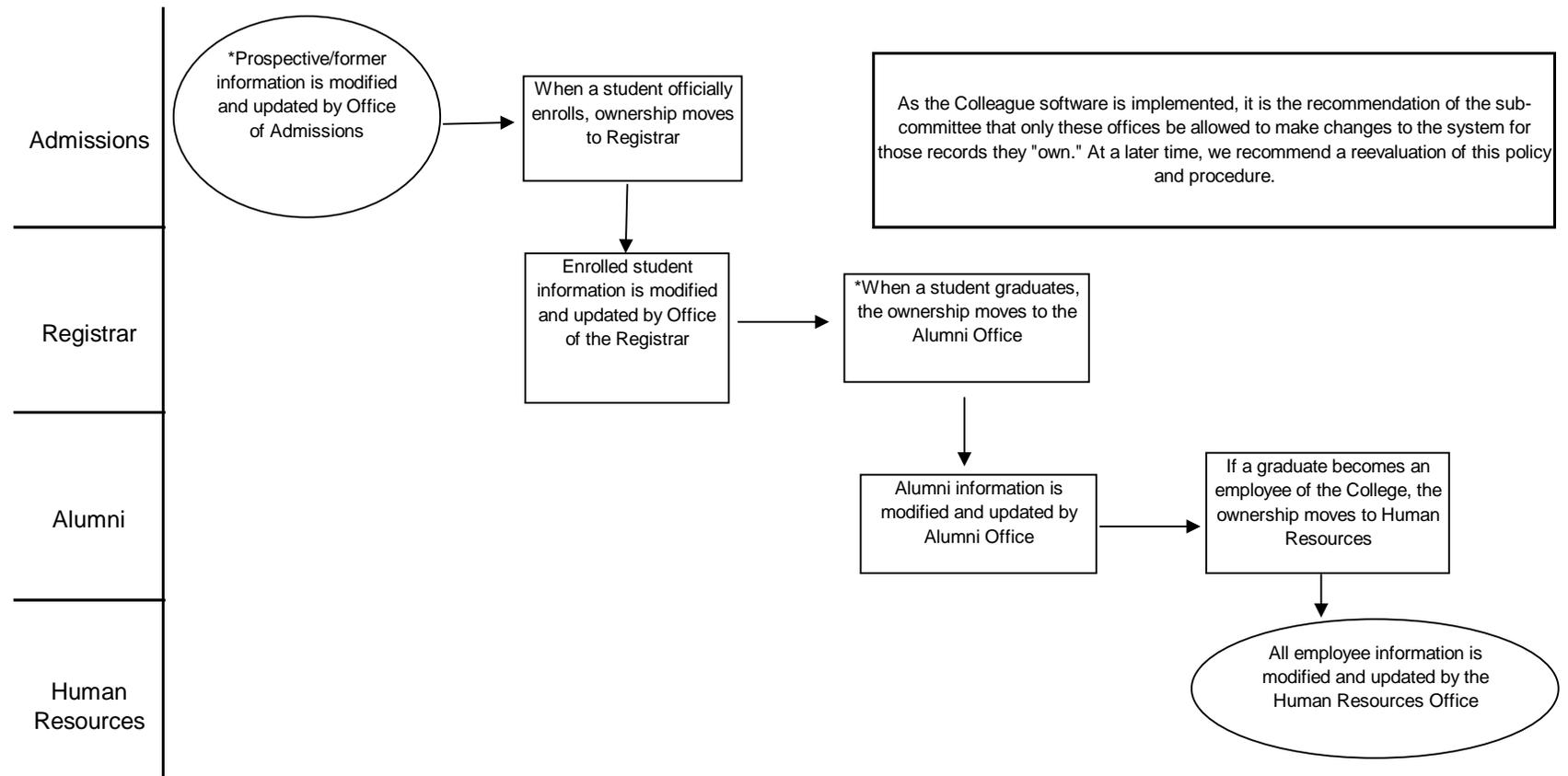
## Geographic Directional Abbreviations

<u>Direction</u>	<u>Abbreviation</u>
North	N
East	E
South	S
West	W
Northeast	NE
Southeast	SE
Northwest	NW
Southwest	SW

## Military “State” Abbreviations

<u>Military “State”</u>	<u>Abbreviation</u>
Armed Forces Europe, the Middle East, and Canada	AE
Armed Forces Pacific	AP
Armed Forces Americas (except Canada)	AA

## Appendix C – Augustana College Demographic Ownership Flow Chart



Ownership - office that updates and maintains the record
Prospect - an incoming first-year or transfer student
Former - a student not enrolled for one term or more
Enrolled - a student who has attended class(es)
Graduate - considered <i>alumni</i> - in this case may also include students who did not graduate but attended for two or more terms
updated 2/23/06

## Appendix D – Documentation Required to Make a Change in Demographic Information

OWNERSHIP	Name Change	Address/Phone Change	SS# Change	Recording Death	Birthdate Changes	Recording Marriage	Recording Divorce	Recording Births
↓ <b>ADMISSIONS</b> (prior to enrollment)	* application or other forms completed by student * official documents (scores, transcripts) * imports (searches) * email or phone call from student or parent	* application or other forms completed by student * email or phone call from student or parent * PO forwarding notice * returned mail * imported scores * web programs (anywho.com or 411locate.com)	* application or other forms completed by student * official documents (transcripts, imported scores) * email from student or parent * ISIR from Financial Aid * copy of SS card	* phone call from family member or advisor (guidance counselor) * email from family, HS rep, pastor * newspaper article (accident) or obituary * TV/radio newscast	* application * imports (scores, search tapes) * email or phone call from student or parent	n/a	n/a	n/a
<b>REGISTRAR</b> (after enrollment)	* Social security card with new name * driver's license with new name * gov't issued ID with new name	* demographic change form signed by student	* original social security card	* unofficial - report from family member or rep. * official - death certificate or other public documentation	* birth certificate * driver's license * gov't issued ID	* marriage license * or gov't issued ID with new name - same as name change	* demographic change form signed by student	n/a
<b>ALUMNI AND DEVELOPMENT</b> (after graduation)	* phone call, email, or other written request from alumni * info from staff	* phone call, email, or other written request from alumni * info from staff * web programs (anywho.com)	n/a	* phone call, email, or other request from alumni (attempt to verify through research) * info from staff	n/a	* phone call, email, or other written request from alumni * info from staff	* phone call, email, or other written request from alumni * info from staff	* phone call, email, or other written request from alumni * info from staff
<b>HUMAN RESOURCES</b> (employee)	* written note, email, phone call, or face-to-face (if phone call or face-to-face, written confirmation is requested)	* written note, email, phone call, or face-to-face (if phone call or face-to-face, written confirmation is requested)	n/a (original SS card shown at time of employment)	* death certificate	n/a	* no documentation required	* no documentation required	* no documentation required

Note: Financial Aid Office changes based on student status:  
 Incoming - changes go through Admissions  
 Returning - changes go through Registrar



# Appendix E - Official Information Change Form for an Individual

## Augustana Official Information Change Form for an individual

Current information as it appears at Augustana, sign and submit to: The Office of the Registrar, Founders Hall, Augustana College, Rock Island IL 61201

Student ID# \_\_\_\_\_

Current Last Name \_\_\_\_\_ First \_\_\_\_\_ Middle \_\_\_\_\_

Current Address: Street \_\_\_\_\_

City State Zip \_\_\_\_\_ Phone (\_\_\_\_\_) \_\_\_\_\_

Current status with the college:  currently enrolled student  returning student  former student  prospective student  
 alumni/graduate  employee  friend of the college

**Release directory information:** This information may be included in the college directory (p. 45-46 Handbook) (name, local & home address, mailbox, home numbers, parent's name/addresses, date & place of birth, dates of attendance, major, faculty advisor, academic class, previous institutions, awards, honors, and degrees, sports participation, and physical factors.)

Yes, you may release my directory information

No, do not release my directory information

(by selecting "NO" to withhold directory information you will not have Dean's List or academic award information released to your local media.)

**Change of name** (must provide legal document for verification: SS card, driver's license, marriage license, etc.)

NEW NAME: Last \_\_\_\_\_ First \_\_\_\_\_ Middle \_\_\_\_\_

Reason for change:  marriage (date: \_\_\_\_\_)  divorce  widowed  other: \_\_\_\_\_

**Change of address**

My local address status is:  Commuter  released for off-campus  independent student  I live in campus housing

NEW ADDRESS:

Street \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

Zip \_\_\_\_\_

This change is for:  my own local

parental address change for both parents

billing

off-campus

secondary (non-custodial parent)

mother only

father only

other: \_\_\_\_\_

**Change of phone number**

NEW Phone number: (\_\_\_\_\_) \_\_\_\_\_

This change is for:  local/off-campus number

cell

parental phone for both parents

mother only

father only

secondary (non-custodial parent)

other: \_\_\_\_\_

**Change of Social Security Number** (must provide original SS card, no copies)

NEW Social Security Number \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ OLD SS# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Change is to:  correct a clerical error

issued new number by government

other: \_\_\_\_\_

**E-mail change:** New e-mail: \_\_\_\_\_ Previous e-mail: \_\_\_\_\_

**NOTE: For Non-Augustana E-mail only. For changes to your Augustana e-mail account see the ITS Helpdesk in the Olin Center.**

**Deceased** (requires death certificate to confirm permanent record change)

Date of death: \_\_\_\_\_ reported by: \_\_\_\_\_

### Individual Statement verification:

I attest that the change of information I have provided here Augustana College is accurate and truthful to the best of my knowledge.

\_\_\_\_\_  
Signature of Individual (or Augustana employee if prospective student or alumni)

\_\_\_\_\_  
date

**FOR OFFICE USE ONLY:** Office receiving form \_\_\_\_\_ date: \_\_\_\_\_

**CAMPUS ROUTING:**

- Current student – Office of the Registrar (Founders Hall)
- Returning student (planning to return to campus) – Admissions (Seminary Hall)
- Former student (not enrolled or returning) – Alumni Office
- Alumni/graduate of the College – Alumni Office (Sorensen Hall)
- Employee – Human Resources (Sorensen Hall)
- Friend – Alumni Office (Sorensen Hall)
- Notes/Comments

# Appendix F - Official Information Change Form for an Organization

## Augustana Official Information Change Form for an Organization

Current information as it appears at Augustana -- to be completed and signed

Current Name \_\_\_\_\_

Current Address: \_\_\_\_\_ Colleague ID# \_\_\_\_\_

Street

(\_\_\_\_\_) \_\_\_\_\_

City

State

Zip

Phone

Current affiliation with the college:  vendor  institution (high school/college)  religious organization  
 corporation  foundation  matching gift organization  other \_\_\_\_\_

**Change of name** (attach letterhead or other appropriate documentation)

NEW NAME: \_\_\_\_\_

Reason for change: \_\_\_\_\_

**Change of address**

**Additional address**

NEW ADDRESS: \_\_\_\_\_

Street

City

State

Zip

This change is for:  physical location  mailing  remittance only  
 other: \_\_\_\_\_

**Change of phone number**

**Additional phone number**

NEW Phone number: (\_\_\_\_\_) \_\_\_\_\_ NEW Fax number: (\_\_\_\_\_) \_\_\_\_\_

This change is for:  business phone  business fax  business contact (name) \_\_\_\_\_  
 cell  other: \_\_\_\_\_

**E-mail change:** New e-mail: \_\_\_\_\_ Previous e-mail: \_\_\_\_\_

I attest that the change of information I have provided above is accurate and truthful to the best of my knowledge.

\_\_\_\_\_  
 Signature of Individual

\_\_\_\_\_  
 Date

(Augustana employee)

**FOR OFFICE USE ONLY:** Office receiving form \_\_\_\_\_ Date: \_\_\_\_\_

Changes made by \_\_\_\_\_ Date: \_\_\_\_\_

CAMPUS ROUTING:

- Vendor – Business Office (Sorensen Hall)
- Institution – Admissions (Seminary Hall)
- Religious organization Admissions (Seminary Hall)
- Corporation – Development Office (Sorensen Hall)
- Foundation – Development Office (Sorensen Hall)
- Matching gift organization – Development Office (Sorensen Hall)
- Other - Development Office (Sorensen Hall)

Notes/Comments:

## Appendix G - Definition of “Where Used” Codes in Colleague

Where Used	Definition	Screen where information stored	Application
MAI	Mailing record linked to the record within Communications Management	A number of screens within communications Management Module	CORE
STA	Client staff information stored on the SVM form. All users of Colleague will have “STA” for their Where Used	STA	CORE
VEN	Vendor information linked to record	VEND	CORE
COR	Corporation information linked to record	ORGP	CORE
INS	Institution information linked to record	INST	CORE
PER	General person information linked to record	NAE	CORE
FOR	Foreign Person information linked to record	FINF FPER	CORE ST
PPE	Physical Plant Employee file linked to record	PPEM	CF
HRP	Record has link with the HRPER file in HR	FACL NFAC	HR
EMP	Employment information linked to record	EPOV or ETAX	HR
PRO	Prospect information linked to record	PRSP	ST
APP	Application file linked to record	APPN or SHAP	ST
FAC	Faculty information linked to record	FCTY	ST
STU	Student information linked to record	When “Moved to Student” Process is run	ST
FIN	Financial Aid linked to record	Financial aid forms	ST
CON	Part of the Alumni Development System	CON	CA

You will see these codes when you view a resolution screen after a search:

PERSON Lookup Screen  
using PERSON, View: Combined

Seq	Name	Address	SSN	Where Used
1:	Fisher, C. Ed	4375 Fairlakes Ct		
	0000420	Fairfax, VA 22033	10/29/01	
	STA - Staf	STA		
2:	Fisher, Fran	90021 Oak St Apt 242	126-75-3122	
	0000254	Fairfax, VA 22022	10/08/01	
	STU - Stud (Johnson)	APP,CON,MAI,PER,STU,FIN	10/11/83	
3:	Fisher, Freddy	90021 Oak St Apt 242		
	0000334	Fairfax, VA 22022	10/18/01	
	SPO - Spou (Johnson)	MAI,APP	05/06/52	
4:	Fisher, Joseph E	4375 Fairlakes Ct		
	0000416	Fairfax, VA 22033	10/29/01	
	STA - Staf	STA		

Controller LookUp Resolution Page 1/2  
Seq Number, (F)lag, (V)iew, (S)ort/Select, (A)dd: [ ]

