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Banner

General Self-Service

Handbook

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Notices

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Contents

Banner General Self-Service overview

This guide provides information targeted for administrative users at your institution who may assist employees and students who will use the Banner Direct Deposit application.

It also contains information targeted for administrative users at your institution who may assist Employees, alumni or friends, and students who will use the Banner Personal Information application.

Mobile devices

Personal Information supports certain mobile devices up to the version listed.

- Android tablet (Nexus 7)
- iPhone 6 and higher
- iPad Air 2
- Samsung S4

Accessibility

Personal Information supports certain accessibility tools up to the version listed.

- JAWS 16
- NVDA 2014.1
- WAVE 1.1.7

Translation

Personal Information supports certain languages.

- Arabic
- English (American)
- English (Australia)
- English (United Kingdom)
- English (Ireland)
- English (India)
- French
- French (Canada)

- Spanish
- Portuguese

Login steps

You can log in to the main Banner General Self-Service landing page, where you are then able to navigate to the Banner Direct Deposit or Banner Personal Information applications.

Procedure

1. Access the Banner General Self-Servicelanding page URL: <server>:<port>/BannerGeneralSsb.
2. Enter your user name and password.
3. Click **Sign In**.

   The Banner General Self-Service landing page appears.

   Note: The Terms of Usage Page is displayed the first time you log into Self-Service and two conditions are true: the **Accepted** indicator is set to `No` on the Third Party Access Audit Page (GOATPAD), and the **Display Usage Page** indicator is checked on the Customize Web Rules Page (twbkwrul.P_ModifyPgWebRules) in Web Tailor. When the user selects **Continue** to accept the terms, the **Accepted** indicator is set to `Yes` on GOATPAD. The text that is displayed on the Terms of Usage Page is based on the rules you set up on the GURINFO page. The rules on GURINFO are role-specific, so you can display different text to each role. This page is the same as the Banner Web General 8.x Self-Service page, Terms of Usage (twbkwbis.P_UsagePage). The page details and setup can be found in the Banner Web General 8.6 User Guide in the “Technical Reference” chapter, under the “Terms of Usage” topic.

Banner Direct Deposit Overview

Banner Direct Deposit is an Ellucian application that allows your employees and students to create, update and delete bank account records so that they can receive payments through direct deposit.

While employees have had access to this functionality for quite a while through Employee Self-Service, Banner Direct Deposit now makes it available to students as well.

Features

Your employees and students can use the Banner Direct Deposit application Self-Service features to inform the institution regarding how they would like to be paid or reimbursed and where they would like the funds they are due to be deposited.

Your administrative users in the Payroll and Accounts Payable areas will save time by no longer needing to process, create, update and delete direct deposit information for employees and students.

Security considerations

Role-based security – If users do not have the role of student or employee based upon the data about them in the Banner database, they will be presented with the message ‘`You are not authorized to view this page`,’ upon login and will not be able to access the application.

Relationship with other Banner products

The Banner Direct Deposit application interacts with Direct Deposit Recipient (GXADIRD) in the Administrative Banner application. As such, the information that employees and students create, update and delete while using the Banner Direct Deposit application will have an impact on the Payroll process in Banner Human Resources and the Account Payable check process in Banner Finance.

Login steps

You can log in to the Banner Direct Deposit application as a standalone product.

Procedure

1. Access the Banner Direct Deposit URL: <server>:<port>/BannerGeneralSsb/ssb/directDeposit.
2. Enter your user name and password.

3. Click **Sign In**.

   The Banner Direct Deposit landing page appears.

User Interface

The employee and student user interface has two landing pages: the desktop landing page and mobile/or tablet device landing page.

Differences in user experience

The user experience varies depending on your user role and the device you use.

Employees have payroll direct deposit allocations and accounts payable direct deposit accounts. Students have only accounts payable direct deposit accounts.

You can use the **Edit** button on a mobile or tablet to perform edits or updates and the system saves these actions one at a time. The **Edit** button does not display on a desktop.

Desktop landing page of the employee user interface

An employee with no existing direct deposit allocations is presented with three sections on the landing page of the Banner Direct Deposit user interface.

- The first section, Pay Distribution as of MM/DD/YYYYY, contains information regarding the last pay distribution date, bank name, routing number, account number, account type, net pay distribution, and total net pay amount.
- The second section, Proposed Pay Distribution, displays the **Delete** button (disabled) and the **Add New** button (enabled), and the informational message, `You have not added any payroll allocations yet. Click Add New to add an allocation.`
- The third section, Accounts Payable Deposit, displays the **Delete** button (disabled) and the **Add New** button (enabled), and the informational message, `You have not added an Accounts Payable allocation yet. Click Add New to add an allocation.`

The employee landing page of the Banner Direct Deposit user interface also contains options for performing the tasks below for the employee.

Field	Description
Add New	Use this button to add a new direct deposit allocation. Also use this option to add a new accounts payable direct deposit allocation.
Delete	Use this button to delete an existing direct deposit allocation. Also use this option to delete an existing accounts payable direct deposit allocation.

Add payroll direct deposit allocations for the employee on the desktop

Employees can add payroll direct deposit allocations by clicking the **Add New** button on the Proposed Pay Distribution section. Clicking the **Add New** button opens the Add Payroll Allocation window. The payroll Amount is designated as Remaining, Specific, or Percentage.

The Add Payroll Allocation window contains options for performing the tasks below for employees.

Field	Description
Bank Routing Number	Enter a valid Bank Routing number for your institution. Valid bank routing numbers for the United States can contain up to 9 characters. Valid bank routing numbers for non-US banks can contain up to 11 characters. Bank Routing numbers must exist in Bank Routing Number Validation (GXVDIRD) otherwise the employee will receive an `invalid value` error message when they attempt to add a payroll allocation.
Sample Check icon ‘i’	Select this icon to view an image of a sample check that displays the locations of the bank routing number and account number on a check
Account Number	Enter a valid bank Account Number. Valid bank account numbers for the United States can contain up to 17 characters. Valid bank account numbers for non-US banks can contain up to 34 characters.
Account Type drop-down list	Use this drop-down list to select either checking or savings for the Payroll direct deposit allocation.
Amount	Radio button group • Use Remaining Amount – Select this option button to deposit the amount of money remaining after the prior allocations are deposited into the designated accounts. **Note:** If the **Use Remaining Amount** option button is selected, the **Priority** field will be disabled and not available for selection. Remaining Amount can also be selected to deposit the entire allocation into one designated account. • Use Specific Amount – Select this option button to deposit a specific amount of money into the designated account. Enter this amount in the ‘Enter Amount’ input field. Valid values are 0.01 to 99999999.99. • Use Percentage – Select this option button to deposit a percentage amount of money into the designated account. Enter this amount in the **Enter Percentage** % input field.
Priority list field	Use this drop-down list to select a priority for the direct deposit allocation. Select the down arrow from this list to display the priority numbers available for selection.

Field	Description
	Note: The next priority available for selection will display in this list by default and another value may be selected from the list if desired. If Use Remaining Amount option button is selected, the Priority field will be disabled and not available for selection.
Disclaimer check box	Use this check box to acknowledge the customized disclaimer message that the institution has created to receive authorization to initiate direct credits or debits on behalf of the user.
Cancel Changes	Use this button to cancel any pending changes that may exist on the landing page. **Note:** This button is not enabled until there are pending changes on the landing page.
Save New Deposit	Use this button to save any pending changes that may exist on the landing page. **Note:** This button is not enabled until the disclaimer check box is checked.

Add payroll bank account information - remaining amount

Employees can add payroll bank account information “remaining amount” using the desktop view.

Procedure

1. On the Proposed Pay Distribution section, click **Add New**.
2. On the **Add Payroll Allocation** window, enter the Bank Routing Number.
3. In the **Account Number** field, enter the account number.
4. From the **Account Type** list, select the account type.
5. Click **Use Remaining Amount**.
   This option is selected by default.
6. Check the **disclaimer text box** to acknowledge you read the disclaimer.
7. Click **Save New Deposit**.

   The `Saved Successfully` message appears.

   If the institution has configured the Email Notification functionality in administrative Banner, employees receive an email sent to their preferred email address informing them that there have been changes to their direct deposit information.

Add payroll bank account information - use specific amount

Employees can add payroll bank account amount information using the desktop view.

Procedure

1. On the Proposed Pay Distribution section, click **Add New**.
2. On the **Add Payroll Allocation** window, enter the Bank Routing Number.
3. In the **Account Number** field, enter the account number.
4. From the **Account Type** list, select the account type.
5. Click **Use Specific Amount**.
6. In the **Enter Amount** field, enter the amount.
   Valid values are 0.01 to 99999999.99. For example, enter $200.00 as 200 and $99.50 as 99.50.
7. Check the **disclaimer text box** to acknowledge you read the disclaimer.
8. Click **Save New Deposit**.

   The `Saved Successfully` message appears.

   If the institution has configured the Email Notification functionality in administrative Banner, employees receive an email sent to their preferred email address informing them that there have been changes to their direct deposit information.

Add payroll bank account information - use percentage

Employees can add payroll bank account “use percentage” information using the desktop view.

Procedure

1. On the Proposed Pay Distribution section, click **Add New**.
2. On the **Add Payroll Allocation** window, enter the Bank Routing Number.
3. In the **Account Number** field, enter the account number.
4. From the **Account Type** list, select the account type.
5. Click **Use Percentage**.
6. In the **Enter Percentage** field, enter the percentage amount.
   Valid values are 0.01 to 99.99. For example, enter 25% as 25 and 88.65% as 88.65.
7. Check the **disclaimer text box** to acknowledge you read the disclaimer.
8. Click**Save New Deposit**.

   The `Saved Successfully` message appears.

   If the institution has configured the Email Notification functionality in administrative Banner, employees receive an email sent to their preferred email address informing them that there have been changes to their direct deposit information.

Note: If the employee has existing Accounts Payable accounts, the Add Payroll Allocation window displays the **Create from existing account** and **Create new** option buttons under the Choose an option heading.

Create payroll bank account records from existing accounts payable bank account records

Employees can also create payroll direct deposit allocations using existing information from accounts payable direct deposit accounts. Changing the **Account Type** in the Proposed Pay Distribution section does not change the account type in the Accounts Payable Deposit section. Employees must have an existing accounts payable direct deposit account to perform the action.

Procedure

1. On the Proposed Pay Distribution section, click **Add New**.
2. On the **Add Payroll Allocation** window, select the **Create from existing account information**.

   The bank name and account number are displayed.
3. Select the Amount.
   - Use Remaining Amount
   - Use Specific Amount - enter the amount in the **Enter Amount** field
   - Use Percentage Amount option buttons - enter the percentage amount in the **Enter Percentage** field
4. Check the **disclaimer text box** to acknowledge you read the disclaimer.
5. Click **Save New Deposit**.

   The `Saved Successfully` message appears.

   If the institution has configured the Email Notification functionality in administrative Banner, employees receive an email sent to their preferred email address informing them that there have been changes to their direct deposit information.

   Note: This account will display as a record in administrative Banner on GXADIRD with the Payroll check box selected, and the existing Accounts Payable account will also display as a separate record with the Accounts Payable check box selected.

   For an employee with existing direct deposit allocations:
   - The first section of the landing page of the Banner Direct Deposit user interface contains information regarding the last pay distribution date, bank name, routing number, account number, account type, net pay distribution, and total net pay amount.
   - The second section contains information regarding proposed pay distribution, bank name, routing number, account number, account type, amount, priority, net pay distribution amount, status, and total net pay amount.
   - The third section contains information regarding Accounts Payable deposits, bank name, routing number, account number, account type, and status. The informational message

`Edit the existing deposit, or select and delete it before adding a new deposit` also displays.

The employee landing page

The employee landing page of the Banner Direct Deposit user interface contains options for performing the tasks below for the employee with existing account(s). The **Status** and **Check** fields are informational only.

Field	Description
Add New button	Use this button to add a new Payroll direct deposit allocation. Also use this option to add a new Accounts Payable direct deposit account. This button will display enabled.
Delete button	Use this button to delete an existing Payroll direct deposit allocation. Also use this option to delete an existing Accounts Payable direct deposit account.
Account Type drop-down list	Use this drop-down list to select either checking or savings for a Payroll direct deposit allocation or an Accounts Payable direct deposit account.
Amount drop-down list	Use this drop-down list to select a remaining amount or enter a specific amount, percentage for the direct deposit allocation.
Priority drop-down list	Use this drop-down list to select a priority for the direct deposit allocation. Select the down arrow from this list to display the priority numbers available for selection. **Note:** . If **Use Remaining Amount** option button is selected, the **Priority** field will be disabled and not available for selection.
Status	This will display as Active or Prenote.
Disclaimer check box	Use this check box to acknowledge the customized disclaimer message that the institution has created to receive authorization to initiate direct credits or debits on behalf of the user.
Cancel Changes	Use this button to cancel any pending changes that may exist on the landing page. **Note:** This button is not enabled until there are pending changes on the landing page.
Save Changes	Use this button to save any pending changes that may exist on the landing page. **Note:** This button is not enabled until the disclaimer check box is checked.

Field	Description
Check	This will display in bold followed by Amount Remaining and the dollar amount the employee will receive in an actual check. This will only display if there are no accounts with a Remaining amount.

Update payroll direct deposit allocations for the employee on the desktop

Employees can edit or update the landing page using the desktop to access the Banner Direct Deposit application.

Update payroll bank account information – account type

Employees can update the payroll bank account type information using the desktop view.

Procedure

1. On the Proposed Pay Distribution section, select the **Account Type** drop-down list from an existing account.
2. Choose either Checking or Savings from the list.
3. Check the **disclaimer text box** to acknowledge you read the disclaimer.
4. Click **Save Changes**.

   The `Saved Successfully` message appears.

   If the institution has configured the Email Notification functionality in administrative Banner, employees will not receive an email sent to their preferred email address informing them that there have been changes to their direct deposit information.

Update payroll bank account information – amount

Employees can update the payroll bank account amount information using the desktop view.

Procedure

1. Select the Amount.
   - Use Remaining Amount
   - Use Specific Amount - enter the amount in the **Enter Amount** input field
   - Use Percentage Amount option buttons - enter the percentage amount in the **Enter Percentage** input field
2. Check the **disclaimer text box** to acknowledge you read the disclaimer.
3. Click **Save Changes**.

   The `Saved Successfully` message sppears.

If the institution has configured the Email Notification functionality in administrative Banner, employees do not receive an email sent to their preferred email address informing them that there have been changes to their direct deposit information.

Update priority for payroll direct deposit allocations for the employee on the desktop

Employees can change the priority of their existing Payroll direct deposit allocations using the Priority field list.

Re-prioritize payroll direct deposit allocations

The steps below demonstrate an example of re-prioritizing accounts when there are five existing accounts and none has Remaining in the **Amount** field.

Procedure

1. On the Proposed Pay Distribution section, select the Priority drop-down for the first existing bank account in the list.
2. Choose a number from the list (for example, select 3 from the Priority drop-down list).

   The first account becomes the third account, and the second and third accounts become the first and second accounts. The fourth and fifth accounts remain in the same position.
3. Check the **disclaimer text box** to acknowledge you read the disclaimer.
4. Click **Save Changes**.

   The `Saved Successfully` message appears.

   If the institution has configured the Email Notification functionality in administrative Banner, employees receive an email sent to their preferred email address informing them that there have been changes to their direct deposit information.

   Note: Any account with a Remaining amount will always be last in the account list and will not be included in re-prioritization or reordering of the accounts.

Delete payroll direct deposit allocations for the employee on the desktop

Employees can delete a single or multiple payroll direct deposit allocation(s) by selecting the check box(es) in front of the account(s) to be deleted and clicking the **Delete** button.

Procedure

1. Select the check box(es) next to the Payroll account(s) to be deleted under the Proposed Pay Distribution section.
2. Click the **Delete** button.

The message `Are you sure you want to delete the selected Payroll deposits?` is displayed.

3. Click the **Delete** button in the notification window to remove the account.

   If the institution has configured the Email Notification functionality in administrative Banner, employees receive an email sent to their preferred email address informing them that there have been changes to their direct deposit information.

Delete legacy payroll/accounts payable direct deposit accounts for the employee on the desktop

Employees can have a single legacy account that exists for both payroll and accounts payable.

This would be displayed in administrative Banner on GXADIRD with both the **Payroll** and **Accounts Payable** check boxes selected. This single account will display in the Banner Direct Deposit application in the Proposed Pay Distribution section for Payroll and also in the Accounts Payable Deposit section for Accounts Payable. The employee can delete either the payroll or the accounts payable allocation for this single account by selecting the check box in front of the account to be deleted in the Proposed Pay Distribution section for Payroll or the Accounts Payable Deposit section for Accounts Payable and clicking the **Delete** button.

Changing the account type in the Proposed Pay Distribution/Accounts Payable Deposit section also changes the account type in the Accounts Payable Deposit/Proposed Pay Distribution section.

Delete a legacy payroll direct deposit allocation

Employees can delete a legacy payroll direct deposit allocation using the desktop view.

Procedure

1. On the Proposed Pay Distribution section, select the check box next to the Payroll account(s) to be deleted.
2. Click **Delete**.

   The `Are you sure you want to delete the selected Payroll deposits?` message appears.
3. In the notification window, click **Delete** to remove the account.

   If the institution has configured the Email Notification functionality in administrative Banner, employees receive an email sent to their preferred email address informing them that there have been changes to their direct deposit information.

Delete a legacy accounts payable direct deposit account

Employees can delete a legacy accounts payroll direct deposit account using the desktop view.

Procedure

1. On the Accounts Payable Deposit section, select the check box next to the Accounts Payable account to be deleted.
2. Click **Delete**.

   The `Are you sure you want to delete the selected Payroll deposits?` message appears.
3. In the notification window, click **Delete** to remove the account.

   If the institution has configured the Email Notification functionality in administrative Banner, employees receive an email sent to their preferred email address informing them that there have been changes to their direct deposit information.

Add accounts payable direct deposit accounts for the employee on the desktop

Employees can add accounts payable direct deposit accounts for the employee by clicking the **Add New** button under the Accounts Payable Deposit section. Clicking the **Add New** button opens the Add Accounts Payable Deposit window.

The Add Accounts Payable Deposit window contains options for performing the tasks below for employees.

Field	Description
Bank Routing Number	Enter a valid Bank Routing number for your institution. Valid bank routing numbers for the United States can contain up to 9 characters. Valid bank routing numbers for non-US banks can contain up to 11 characters. Bank Routing numbers must exist in Bank Routing Number Validation (GXVDIRD) otherwise the employee will receive an `invalid value` error message when they attempt to add an Accounts Payable account.
Sample Check icon ‘i’	Select this icon to view an image of a sample check that displays the locations of the bank routing number and account number on a check. **Note:** This field is displayed only for US users.
Account Number	Enter a valid bank Account Number. Valid bank account numbers for the United States can contain up to 17 characters. Valid bank account numbers for non-US banks can contain up to 34 characters.
Account Type drop-down list	Use this drop-down list to select either checking or savings for the Accounts Payable direct deposit account.

Field	Description
Disclaimer check box	Use this check box to acknowledge the customized disclaimer message that the institution has created to receive authorization to initiate direct credits or debits on behalf of the user.
Cancel Changes	Use this button to cancel any pending changes that may exist on the landing page. **Note:** This button is not enabled until there are pending changes on the landing page
Save New Deposit	Use this button to save any pending changes that may exist on the landing page. **Note:** This button is not enabled until the disclaimer check box is checked.

Note: If the employee has existing Payroll accounts, the Add Accounts Payable Deposit window displays the **Create from existing account** and **Create new** option buttons under the Choose an option heading.

Add accounts payable direct deposit account for the employee on the desktop

Employees can add accounts payable direct deposit account for the employee using the desktop view.

Procedure

1. On the Accounts Payable Deposit section, click **Add New**.
2. Click **Create New**.
3. In the **Bank Routing Number** field, enter the bank routing number.
4. In the **Account Number** field, enter the account number.
5. From the **Account Type** list, select the account type (either Checking or Savings).
6. Check the **disclaimer text box** to acknowledge you read the disclaimer.
7. Click **Save New Deposit**.

   The `Saved Successfully` message appears.

   If the institution has configured the Email Notification functionality in administrative Banner, employees receive an email sent to their preferred email address informing them that there have been changes to their direct deposit information.

Create accounts payable direct deposit accounts from existing payroll bank account records

Employees can also create accounts payable direct deposit accounts using existing information from payroll direct deposit allocations. Changing the account type in the Accounts Payable Deposit section does not change the account type in the Proposed Pay Distribution section. Employees must have an existing payroll direct deposit allocation to perform the actions below.

Procedure

1. On the Accounts Payable Deposit section, click **Add New**.
2. Click **Create from existing account information**.
3. Select the account to be used from the drop-down list if multiple payroll accounts exist or proceed to the next step (if there is only one payroll account it will be used).
4. Check the **disclaimer text box** to acknowledge you read the disclaimer.
5. Click **Save New Deposit**.

   The `Saved Successfully` message appears.

   If the institution has configured the Email Notification functionality in administrative Banner, employees will receive an email sent to their preferred email address informing them that there have been changes to their direct deposit information.

   Note: This account is displayed as a record in administrative Banner on GXADIRD with the **Accounts Payable** check box selected, and the existing Payroll account will also display with the **Payroll** check box selected.

Update accounts payable direct deposit accounts for the employee on the desktop

Employees can update their existing accounts payable direct deposit account by selecting the Account Type down arrow on the Account Type field list.

Procedure

1. From the **Account Type** list, select the account type (either Checking or Savings).
2. Check the **disclaimer text box** to acknowledge you read the disclaimer.
3. Click **Save Changes**.

   The `Saved Successfully` message appears.

   If the institution has configured the Email Notification functionality in administrative Banner, employees do not receive an email sent to their preferred email address informing them that there have been changes to their direct deposit information.

Delete accounts payable direct deposit accounts for the employee on the desktop

Employees can delete their existing accounts payable direct deposit account by selecting the check box in front of the account to be deleted and clicking the **Delete** button.

Procedure

1. Select the check box next to the Accounts Payable account to be deleted.
2. Click the **Delete** button.

   The `Are you sure you want to delete the selected Accounts Payable deposits?`message is displayed.
3. Click the **Delete** button in the notification window to remove the account.

   If the institution has configured the Email Notification functionality in administrative Banner, employees receive an email sent to their preferred email address informing them that there have been changes to their direct deposit information.

Desktop landing page of the student user interface

A student with no existing direct deposit account information is presented with the Accounts Payable Deposit section on the landing page of the Banner Direct Deposit user interface.

This section displays the **Delete** button (disabled), the **Add New** button (enabled), and the informational message, `You have not added an Accounts Payable allocation yet. Click "Add New to add an allocation.`

The student landing page of the Banner Direct Deposit user interface contains options for performing the tasks below for the student.

Field	Description
Add New button	Use this button to add a new accounts payable direct deposit account. This button is displayed as enabled.
Delete button	Use this button to delete an existing accounts payable direct deposit account. This button is displayed as disabled until a direct deposit account is added.

Add accounts payable direct deposit accounts for the student on the desktop

Students can add accounts payable direct deposit accounts using the desktop view.

Procedure

1. On the Accounts Payable Deposit section, click **Add New**.
2. In the **Bank Routing Number** field, enter the bank routing number.
3. In the **Account Number** field, enter the account number.
4. From the **Account Type** list, select the account type (either Checking or Savings).
5. Check the **disclaimer text box** to acknowledge you read the disclaimer.
6. Click **Save New Deposit**.

   The `Saved Successfully` message appears.

   If the institution has configured the Email Notification functionality in administrative Banner, students receive an email sent to their preferred email address informing them that there have been changes to their direct deposit information.

The student landing page

The student landing page of the Banner Direct Deposit user interface contains information regarding Accounts Payable direct deposit account: bank name, routing number, account number, account type, and status.

The student landing page of the Banner Direct Deposit user interface also contains options for performing the tasks below for the student with an existing account. The informational message `Edit the existing deposit, or select and delete it before adding a new deposit` also displays. The student can update, and delete an accounts payable direct deposit account. There are no payroll direct deposit allocations for students. Status is informational only.

Field	Description
Add New button	Use this button to add a new accounts payable direct deposit account. This button is displayed as disabled when there is an existing account.
Delete button	Use this button to delete an existing accounts payable direct deposit account. This button becomes enabled after the check box next to the account to be deleted is selected.
Account Type drop-down list	Use this drop-down list to select either checking or savings for the accounts payable direct deposit account.
Status	This will display as Active or Prenote.
Disclaimer check box	Use this check box to acknowledge the customized disclaimer message that the institution has created to receive authorization to initiate direct credits or debits on behalf of the user.

Field	Description
Cancel Changes	Use this button to cancel any pending changes that may exist on the landing page. **Note:** This button is not enabled until there are pending changes on the landing page.
Save Changes	Use this button to save any pending changes that may exist on the landing page. **Note:** This button is not enabled until the disclaimer check box is selected.

Update accounts payable direct deposit accounts for the student on the desktop

Students can update their existing accounts payable direct deposit account by selecting the Account Type down arrow on the Account Type field list.

Procedure

1. From the **Account Type** list, select the account type (either Checking or Savings).
2. Check the **disclaimer text box** to acknowledge you read the disclaimer.
3. Click **Save Changes**.

   The `Saved Successfully` message appears.

   If the institution has configured the Email Notification functionality in administrative Banner, students do not receive an email sent to their preferred email address informing them that there have been changes to their direct deposit information.

Delete accounts payable direct deposit accounts for the student on the desktop

Students can delete their existing accounts payable direct deposit account by selecting the check box in front of the account to be deleted and clicking the **Delete** button.

Procedure

1. Select the check box next to the accounts payable account to be deleted.
2. Click **Delete**.

   The `Are you sure you want to delete the selected Accounts Payable deposits?`message appears.
3. In the notification window, click **Delete** to remove the account.

If the institution has configured the Email Notification functionality in administrative Banner, students receive an email sent to their preferred email address informing them that there have been changes to their direct deposit information.

Mobile/tablet device landing page of the employee user interface

An employee with no existing direct deposit account information will be presented with three sections on the landing page of the Banner Direct Deposit user interface.

- The first section, Pay Distribution as of MM/DD/YYYYY, contains information regarding the last pay distribution date, bank name, routing number, account number, account type, net pay distribution, and total net pay amount.
- The second section, Proposed Pay Distribution, displays the **Delete** button (disabled) and the **Add New** button (enabled), and the informational message, `You have not added any payroll allocations yet. Click Add New to add an allocation.`
- The third section, Accounts Payable Deposit, displays the **Delete** button (disabled) and the **Add New** button (enabled), and the informational message, `You have not added an Accounts Payable allocation yet. Click Add New to add an allocation.`

The employee landing page of the Banner Direct Deposit user interface also contains options for performing the tasks below for the employee.

Action	Description
Add New button	Use this button to add a new payroll direct deposit allocation. Also use this option to add a new accounts payable direct deposit account. This button will display enabled.
Delete button	Use this button to delete an existing payroll direct deposit allocation. Also use this option to delete an existing accounts payable direct deposit allocation. This button will display disabled until a direct deposit allocation is added.

For an employee with existing direct deposit allocations, the first section of the employee landing page of the Banner Direct Deposit user interface contains information regarding the last pay distribution date, bank name, routing number, account number, account type, net pay distribution, and total net pay amount. The second section of the employee landing page contains information regarding proposed pay distribution, bank name, routing number, account number, account type, edit button, amount, priority, net pay distribution amount, status, and total net pay amount. The third section of the employee landing page contains information regarding Accounts Payable deposits, bank name, routing number, account number, account type, edit button, and status. The informational message `Edit the existing deposit, or select and delete it before adding a new deposit` also displays.

The employee landing page of the Banner Direct Deposit user interface contains the information listed below for the employee with existing account(s). Only the **Add New, Edit**, and **Delete** buttons can be enabled. The **Check** and **Status** fields are informational only.

Action	Description
Add New button	Use this button to add a new payroll direct deposit allocation. Also use this option to add a new accounts payable direct deposit account. This button will display enabled.
Delete button	Use this button to delete an existing payroll direct deposit allocation. Also use this option to delete an existing accounts payable direct deposit account.
Edit button for each account	Use this button to open the Edit Payroll Allocation window for editing an existing Payroll direct deposit allocation. Also use this option to edit an existing Accounts Payable direct deposit account.
Bank Name	The bank name will display in bold.
Routing	The bank routing number will display masked with only the last four characters showing.
Account	The bank account number will display masked with only the last four characters showing.
Account Type	This will display as an account type of checking or savings for the specific direct deposit allocation or the specific Accounts Payable direct deposit account.
Amount	This will display as Remaining for a remaining amount or a dollar amount for a specific amount or a percentage for a percentage amount for the specific direct deposit allocation.
Priority	This will display the priority for the specific direct deposit allocation.
Status	This will display as Active or Prenote.
Check	This will display in bold followed by the Amount Remaining and the dollar amount the employee will receive in an actual check. This will only display if there are no accounts with a Remaining amount.

Adding and deleting direct deposit allocations using a desktop, mobile device or tablet to access the Banner Direct Deposit application requires the same steps. Making edits or updates using a Mobile or Tablet device is a different experience for a user accessing the Banner Direct Deposit application on the desktop.

Edit/update payroll direct deposit allocations for the employee on mobile or tablet device

You can edit or update payroll direct deposit allocations for the employee by clicking the Edit button for a payroll direct deposit allocation under the Proposed Pay Distribution section. Clicking the Edit button for the account will open the Edit Payroll Allocation window. The payroll Amount may be designated as Remaining, Specific, or Percentage.

The Edit Payroll Allocation window contains options for performing the tasks below for employees.

Field	Description
Bank Routing Number	The Bank Routing number and bank name display disabled and cannot be edited. Valid bank routing numbers for the United States can contain up to 9 characters. Valid bank routing numbers for non-US banks can contain up to 11 characters. Bank Routing numbers must exist in Bank Routing Number Validation (GXVDIRD) otherwise the employee will receive an `invalid value` error message when they attempt to add a payroll allocation.
Sample Check icon 'i'	Select this icon to view an image of a sample check that displays the locations of the bank routing number and account number on a check. **Note:** This field is displayed only for US users.
Account Number	The bank Account Number displays disabled and cannot be edited. Valid bank account numbers for the United States can contain up to 17 characters. Valid bank account numbers for non-US banks can contain up to 34 characters.
Account Type drop-down list	Use this drop-down list to select either checking or savings for the payroll direct deposit allocation.
Amount	Radio button group – • Use Remaining Amount – Select this option button to deposit the amount of money remaining after the prior allocations are deposited into the designated accounts. **Note:** If **Use Remaining Amount** option button is selected, the **Priority** field will be disabled and not available for selection. Remaining Amount can also be selected to deposit the entire allocation into one designated account. • Use Specific Amount – Select this option button to deposit a specific amount of money into the designated account. Enter this amount in the **Enter Amount** input field. Valid values are 0.01 to 99999999.99. • Use Percentage – Select this option button to deposit a percentage amount of money into the designated account. Enter this amount in the **Enter Percentage %** input field.
Priority list field	Use this drop-down list to select a priority for the direct deposit allocation. Select the down arrow from this list to display the priority numbers available for selection. **Note:** The next priority available for selection will display in this list by default and another value may be selected from the list if desired. If **Use Remaining Amount** option button is selected, the **Priority** field will be disabled and not available for selection.

Field	Description
Disclaimer check box	Use this check box to acknowledge the customized disclaimer message that the institution has created to receive authorization to initiate direct credits or debits on behalf of the user.
Cancel Changes	Use this button to cancel any pending changes that may exist on the landing page. **Note:** This button is not enabled until there are pending changes on the landing page.
Save New Deposit	Use this button to save any pending changes that may exist on the landing page. **Note:** This button is not enabled until the disclaimer check box is selected.

Edit/update payroll bank account information account type for employee on mobile or tablet devices

Employees can edit or update their payroll bank account information account type on mobile or tablet devices.

Procedure

1. Click the **Edit** icon next to the payroll account to be updated.
2. From the **Account Type** list, select the account type (either Checking or Savings).
3. Check the **disclaimer text box** to acknowledge you read the disclaimer.
4. Click **Save Changes**.

   The `Saved Successfully` message appears.

   If the institution has configured the Email Notification functionality in administrative Banner, this change does not send an email message to the employee's preferred email address that there have been changes to their direct deposit information.

Edit/update payroll bank account information amount for employee on mobile or tablet devices

Employees can edit or update their payroll bank account information amount type on mobile or tablet devices.

Procedure

1. Click the **Edit** icon next to the payroll account to be updated.
2. Select an option from the **Amount** option buttons.

- Use Remaining Amount
- Use Specific Amount - enter the amount in the input field (Enter Amount)
- Use Percentage Amount - enter the percentage amount in the input field (Enter Percentage)

3. Check the **disclaimer text box** to acknowledge you read the disclaimer.
4. Click **Save Changes**.

   The `Saved Successfully` message appears.

   If the institution has configured the Email Notification functionality in administrative Banner, this change does not send an email message to the employee's preferred email address that there have been changes to their direct deposit information.

   Note: Only one record may have Remaining amount or 100% allocation.

Re-prioritize payroll bank accounts for employee on mobile or tablet devices

Employees can change the priority of their existing payroll direct deposit allocations using the Priority field list. The steps below demonstrate an example of re-prioritizing accounts when there are 5 existing accounts and none has 'Remaining' in the **Amount** field.

Procedure

1. On the Proposed Pay Distribution section, select the Priority drop-down list for the first existing bank account in the list.
2. Choose a number from the list (for example, select 3 from the Priority drop-down list).

   The first account becomes the third account, and the second and third accounts become the first and second accounts. The fourth and fifth accounts remain in the same position.
3. Check the **disclaimer text box** to acknowledge you read the disclaimer.
4. Click **Save Changes**.

   The `Saved Successfully` message appears.

   If the institution has configured the Email Notification functionality in administrative Banner, employees receive an email sent to their preferred email address informing them that there have been changes to their direct deposit information.

   Note: The **Priority** field for the account with a Remaining amount is always disabled and is not editable. Tapping this **Priority** field will display the message `Remaining account must be the last priority. Changing priority is not permitted.`

Edit/update accounts payable direct deposit accounts for the employee or student on mobile or tablet devices

Employees and students can edit or update their accounts payable direct deposit accounts by clicking the **Edit** button under the Accounts Payable Deposit section. Clicking the Edit button opens the Edit Accounts Payable Deposit window.

The Edit Accounts Payable Deposit window contains options for performing the tasks below for employees or students.

Field	Description
Bank Routing Number	The Bank Routing number and bank name display disabled and cannot be edited. Valid bank routing numbers for the United States can contain up to 9 characters. Valid bank routing numbers for non-US banks can contain up to 11 characters. Bank Routing numbers must exist in Bank Routing Number Validation (GXVDIRD) otherwise the employee will receive an `invalid value` error message when they attempt to add a payroll allocation.
Sample Check icon 'i'	Select this icon to view an image of a sample check that displays the locations of the bank routing number and account number on a check.
Account Number	The bank Account Number displays disabled and cannot be edited. Valid bank account numbers for the United States can contain up to 17 characters. Valid bank account numbers for non-US banks can contain up to 34 characters.
Account Type drop-down list	Use this drop-down list to select either checking or savings for the Accounts Payable direct deposit account.
Disclaimer check box	Use this check box to acknowledge the customized disclaimer message that the institution has created to receive authorization to initiate direct credits or debits on behalf of the user.
Cancel Changes	Use this button to cancel any pending changes that may exist on the landing page. **Note:** This button is not enabled until there are pending changes on the landing page.
Save Changes	Use this button to save any pending changes that may exist on the landing page. **Note:** This button is not enabled until the disclaimer check box is selected.

Edit/update accounts payable bank account information for employee or student on mobile or tablet devices

Employees and students can edit or update their accounts payable bank account information by clicking the **Edit** button under the Accounts Payable Deposit section. Clicking the Edit button opens the Edit Accounts Payable Deposit window.

Procedure

1. Click the **Edit** icon next to the accounts payable account to be updated.
2. From the **Account Type** list, select the account type (either Checking or Savings).
3. Check the **disclaimer text box** to acknowledge you read the disclaimer.
4. Click **Save Changes**.

   The message `Saved Successfully` displays.

   If the institution has configured the Email Notification functionality in administrative Banner, this change will not send an email message to the employee's preferred email address that there have been changes to their direct deposit information.

Mobile/tablet device landing page of the student user interface

A student with no existing direct deposit allocation will be presented with one section on the landing page of the Banner Direct Deposit user interface.

This section, Accounts Payable Deposit, displays the **Delete** button (disabled), the **Add New** button (enabled), and the informational message `You have not added an Accounts Payable allocation yet. Click Add New to add an allocation.`

Field	Description
Add New button	Use this button to add a new Accounts Payable direct deposit account. This button will display enabled.
Delete button	Use this button to delete an existing Accounts Payable direct deposit account. This button will display disabled until a direct deposit allocation is added.

The student landing page of the Banner Direct Deposit user interface contains information regarding accounts payable deposit, bank name, routing number, account number, account type, Edit button, and status. The student landing page of the Banner Direct Deposit user interface also contains options for performing the tasks below for the student with an existing account. The informational message `Edit the existing deposit, or select and delete it before adding a new deposit` also displays. The student will be able to add, update, and delete an accounts payable direct deposit account. Students will not see the Pay Distribution as of MM/DD/YYYY and Proposed Pay Distribution sections.

The student landing page of the Banner Direct Deposit user interface contains the information listed below for the student with an existing account. Only the **Add New**, **Edit**, and **Delete** buttons can be enabled. The **Status** field is informational only.

Field	Description
Add New button	Use this button to add a new Accounts Payable direct deposit account. This button will display disabled when there is an existing account.
Delete button	Use this button to delete an existing Accounts Payable direct deposit account. This button becomes enabled after the check box next to the account to be deleted is selected.
Edit button for specific account	Use this button to open the Edit Accounts Payable Deposit window for editing an existing Accounts Payable direct deposit account.
Bank Name	The bank name will display in bold.
Routing	The bank routing number will display masked with only the last four characters showing.
Account	The bank account number will display masked with only the last four characters showing.
Account Type	This will display as checking or savings for the Accounts Payable direct deposit account.
Status	This will display as Active or Prenote.

Web Tailor parameters

New direct deposit records created in the Update Direct Deposit Allocation page of Employee Self-Service have a status of Prenote as the default.

However, the Banner Direct Deposit application allows clients to set the default status of new direct deposit records to Active if they prefer to by-pass the prenote process. The ability to configure this behavior is a new feature introduced with Banner Direct Deposit.

To change the default status for new direct deposit records, a user with Web Tailor Administration access in Self-Service Banner can login and navigate to the Web Tailor Parameters item on the Web Tailor Administration tab. After finding the parameter SHOW_USER_PRENOTE_STATUS, click the parameter link. Change the Parameter Value from Y to N and click the **Submit Changes** button.

The Banner Direct Deposit application also allows clients to set a maximum number of Payroll direct deposit accounts that employees can create. By default, the maximum number of Payroll direct deposit account records allowed is 99. The ability to configure this behavior is a new feature introduced with Banner Direct Deposit.

To update the default maximum number of Payroll direct deposit accounts that an employee can create, a user with Web Tailor Administration access can login to Self- Service Banner and navigate to the Web Tailor Parameters item on the Web Tailor Tab. After finding the parameter

MAX_USER_PAYROLL_ALLOCATIONS, click the parameter link. Change the Parameter Value from 99 to the desired value and click the **Submit Changes** button.

Banner Personal Information Overview

Banner Personal Information is an Ellucian application that allows Banner Self-Service users the ability to create, update, and delete personal information records to keep their information accurate.

While employees have had access to view this information through the Employee Profile application, they were not able to edit or delete any information directly in the application. Banner Personal Information now makes it possible for users to edit and delete their personal information directly in the application.

Multi-Entity Processing

Personal Information supports Multi-Entity Processing (MEP).

Features

Users with an ID and PIN can use the Personal Information application Self-Service features to enter, update, or delete their personal information without leaving the application.

Your administrative users in the Human Resources areas will save time by no longer needing to process, create, or update personal information for employees, alumni or friends, and students.

Security considerations

All users with an ID and a PIN are able to access the application.

Relationship with other Banner products

The Personal Information application interacts with Address Role Privileges (GOAADRL) in the Administrative Banner application. As such, the roles and privileges assigned to address types allow the Personal Information user either no privilege, view only, or update privileges to their personal information.

The Personal Information application also interacts with the **Business Rules (GORRSQL)** page in the Administrative Banner application. If any GORRSQL rules for SSB_TELEPHONE_UPDATE or SSB_EMAIL_UPDATE are currently active, with the **Active** check box and **Validated** check box selected and if the current date is within the start/stop dates, then those rules dictate which telephone and email types are available to be selected and which telephone and email types are not available for insert controllable by the Self- Service Banner role (for example, Student, Employee, etc.).

The Personal Information application interacts with the **Integration Configuration Settings (GORICCR)** page in the Administrative Banner application. You have to use the PERSONAL_INFORMATION_SSB process for all the Personal Information options.

The Personal Information application interacts with the **Data Display Mask Rules (GORDMSK)** page in the Administrative Banner application. The object **SSB_MASKING, contains records under the PERSONALINFORMATION block that enable users to apply masking rules to specific data elements in the Personal Information application. The data items %_CTRY_CODE_PHONE, %_HOUSE_NUMBER, %_INTL_ACCESS, %_STREET_LINE4 can be marked as visible to display in the application or marked as concealed to be hidden.

The **Gender Identification** field appears under the Personal Details section of the Personal Information application. The GTVGNDR table and the new column SPBPERS_GNDR_CODE in the SPBPERS table are included in Banner General version 8.8.9. You can add Gender Identification values for your institution directly into the GTVGNDR table in your database. The Personal Information application interacts with the **Gender Designation Code Validation (GTVGNDR)** page in Banner General version 9.3.1. Using this page, you can enter gender identification Codes, Descriptions and choose the **Active Indicator** and **Web Indicator** options.

The **Personal Pronoun** field appears under the Personal Details section of the Personal Information application. The GTVPPRN table and the new column SPBPERS_PPRN_CODE in the SPBPERS table are included in Banner General version 8.8.9. You can add Gender Identification values for your institution directly into the GTVPPRN table in your database. The Personal Information interacts with the **Personal Pronoun Validation (GTVPPRN)** page in Banner General version 9.3.1. Using this page, you can enter personal pronoun Codes, Descriptions and choose the **Active Indicator** and **Web Indicator** options.

The *Banner General Release Guide 8.8.9* and the *Banner General User Guide 9.3.1* contain more information about Gender Identification and Personal Pronoun.

The Personal Information application Directory Profile page interacts with the **Directory Options Rule (GOADIRO)** and **Directory Item Validation (GTVDIRO)** pages in the Administrative Banner application. The rules established on the **Directory Options Rule (GOADIRO)** page in Banner General control the items that are included in the Directory Profile, depending on the user's Self-Service roles. GOADIRO also controls which directory items will automatically be the default when the campus directory is created, even if a directory profile record has not been created on the Web. In addition, rules in GOADIRO control which items the user can choose to include in the directory profile. GTVDIRO defines codes for the types of information included in directory profiles. The profile is used to select and print information in the Web directory.

The Personal Information application interacts with the **Name Display (GUANDSP)** page in the Administrative Banner application. Use these rules to display the user's Preferred Name in the Overview section of the Personal Information application. Banner General 8.8.9 release addresses the Change Request Enhancement CR-000142244 - Database structures to support Gender Designations and Personal Pronouns. The *Banner General User Guide Release 8.8.5* contains more information about GUANDSP.

The Personal Information application interacts with the **Enterprise PIN Preferences (GUAPPRF)** page in the Administrative Banner application. When `0` is the value for the Number of Questions in the Question and Answer Preferences section, the Security Questions and Answers link will not display in the Additional Details section of the Personal Information application. When Allow Editable Question is set to `No`, the option to Define a question will be removed.

Login steps

You can log in to the Banner Personal Information application as a standalone product.

Procedure

1. Access the Banner Personal Information URL: <server>:<port>/BannerGeneralSsb/ssb/personalInformation.
2. Enter your user name and password.
3. Click Sign In.
   The Banner Personal Information landing page appears.

Configuration Checklist

This configuration checklist is a quick reference guide that provides you with a list of the decisions you need to make to configure the Personal Information application.

Note: These configuration options affect only the Personal Information 9.x application. Your choices regarding these settings do not affect any other part of Banner.

Overview section configuration

The checklist to configure the Overview section.

Question	Implementation Options
Do you want to display the user's photo to display in the Overview section of the Personal Information application?	• Yes - No action needed. By default, photos are displayed in the Personal Information Overview section. This is set up at the time of installation. If a photo is not available, a generic avatar is displayed. • No - This requires a change to the Integration Configuration Settings (GORICCR) page in the Administrative Banner application.
Do you want to allow the user to update their Preferred email address, which displays in the Overview section of the Personal Information application?	• Yes - No action needed. By default, users can update their Preferred email address, which displays in the Personal Information Overview section. • No - This requires a change to the GORICCR page in the Administrative Banner application.
Do you want to define the hierarchy of Address types to display in the Overview section of the Personal Information application?	• Yes - This requires a change to the GORICCR page in the Administrative Banner application. • No - By default, the first address in the Address section will display.
Do you want to define the hierarchy of Telephone types to display in the Overview section of the Personal Information application?	• Yes - This requires a change to the GORICCR page in the Administrative Banner application. • No - By default, the first phone number in the Phone Number section will display.
Do you want to display the Address in the Overview section of the Personal Information application?	• Yes - By default, the first address in the Address section will display. • No - This requires a change to the GORICCR page in the Administrative Banner application.

Question	Implementation Options
Do you want to display the Email in the Overview section of the Personal Information application?	• Yes - By default, the first email in the Email section will display. • No - This requires a change to the GORICCR page in the Administrative Banner application.
Do you want to display the Phone Number in the Overview section of the Personal Information application?	• Yes - By default, the first phone number in the Phone Number section will display. • No - This requires a change to the GORICCR page in the Administrative Banner application.

Related Links

Overview section on page 40

Personal Information sections

The checklist to configure the Personal Information sections.

Question	Implementation Options
Do you want to display the Personal Details section in the Personal Information application?	• Yes - No action needed. By default, this section is displayed. • No - This requires a change to the GORICCR page in the Administrative Banner application.
Do you want to display the Email section in the Personal Information application?	• Yes - No action needed. By default, this section is displayed. • No - This requires a change to the GORICCR page in the Administrative Banner application.
Do you want to display the Phone Number section in the Personal Information application?	• Yes - No action needed. By default, this section is displayed. • No - This requires a change to the GORICCR page in the Administrative Banner application.
Do you want to display the Address section in the Personal Information application?	• Yes - No action needed. By default, the this section is displayed. • No - This requires a change to the GORICCR page in the Administrative Banner application.
Do you want to display the Emergency Contact section in the Personal Information application?	• Yes - No action needed. By default, this section is displayed.

Question	Implementation Options
	• No - This requires a change to the GORICCR page in the Administrative Banner application.
Do you want to display the Additional Details section in the Personal Information application?	• Yes - No action needed. By default, this section is displayed. • No - This requires a change to the GORICCR page in the Administrative Banner application.
Do you want to display the Other section in the Personal Information application?	• Yes - No action needed. By default, this section is displayed. • No - This requires a change to the GORICCR page in the Administrative Banner application.

Related Links

Display optional Personal Information sections on page 43

Desktop landing page of the Personal Information application

Users can access Personal Information to create, update, and delete personal information records.

The Personal Information application landing page has the following eight sections:

- Overview
- Personal Details
- Email
- Phone Number
- Address
- Emergency Contact
- Additional Details
- Other

Field	Description
Add New	Adds a new email, phone number, address, or emergency contact.
Edit	Edits preferred first name, personal pronoun, gender identification, and marital status information in the Personal Details section. You can also use this button to edit information in the Email, Phone Number, Address, and Emergency Contact and Additional Details (Ethnicity and Race, Veterans Classification, and Disability Status) sections.
Delete	Deletes information in the Email, Phone Number, Address, and Emergency Contact sections.

Overview section

The Overview section displays the user's photo, name as configured in GUANDSP, ID number, preferred email address, address, and phone number. You have the option of displaying or hiding these details.

Related Links

Overview section configuration on page 37

Display photo in the Overview section

You can choose to display a profile photo in the Overview section of the Personal Information application.

Procedure

1. Open the Integration Configuration Settings (GORICCR) page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select the DISPLAY.PROFILE.PICTURE setting and go to the next block of information.
3. In the **Value** field, enter one of the following values:
   - `N` to hide the user's profile picture.
   - `Y` to display the user's profile picture.
4. Save the value.

Display email in the Overview section

You can choose to display an email address in the Overview section of the Personal Information application.

Procedure

1. Open the GORICCR page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select the DISPLAY.OVERVIEW.EMAIL setting and go to the next block of information.
3. In the **Value** field, enter one of the following values:
   - `N` to hide the email in the Overview section.
   - `Y` to display the email in the Overview section.
4. Save the value.

User update of preferred email address displayed in the Overview section

You can choose to allow users to designate a preferred email address to display in the Overview section of the Personal Information application.

Procedure

1. Open the GORICCR page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select the PREFERRED.EMAIL.UPDATABILITY setting and go to the next block of information.
3. In the **Value** field, enter one of the following values:
    - `N` to make sure the user cannot update their preferred email address that displays in the Overview section.
    - `Y` to allow the user to update their preferred email address that displays in the Overview section.
4. Save the value.

Display address in the Overview section

You can choose to display an address in the Overview section of the Personal Information application.

Procedure

1. Open the GORICCR page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select the DISPLAY.OVERVIEW.ADDRESS setting and go to the next block of information.
3. In the **Value** field, enter one of the following values:
    - `N` to hide the address in the Overview section.
    - `Y` to display the address in the Overview section.
4. Save the value.

Update records for displaying the order of addresses

You can select the order of addresses that display in the Overview section of the Personal Information application.

Procedure

1. Open the GORICCR page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select the OVERVIEW.ADDRESS.TYPE setting and go to the next block of information.

3. In the **Value** field, select the Address Type you want to display, which will replace UPDATE_ME (PRIORITY 1).

   For example, MA for Mailing.
4. Verify that the value `1` displays in the **Sequence** field. You can update the number in the order you want the addresses to display.

   For example, 1 for first, 2 for second.
5. Save the value.

Add additional records for displaying the order of addresses

You also have the option of adding additional records for displaying the order of addresses in the Overview section of the Personal Information application.

Procedure

1. Open the GORICCR page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select Insert Record.
3. In the **Setting** field, enter `OVERVIEW.ADDRESS.TYPE`.
4. In the **Sequence** field, enter the number in the order you want the address to display.

   For example, 1 for first, 2 for second.
5. In the **Value** field, enter the Address Type you want to display.

   For example, MA for Mailing.
6. In the **Description** field, enter a value.

   For example, Personal Info Address 3.
7. Leave the **Translation** field blank.
8. Save the value.

Display phone numbers in the Overview section

You can choose to display phone numbers in the Overview section of the Personal Information application.

Procedure

1. Open the GORICCR page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select the DISPLAY.OVERVIEW.PHONE setting and go to the next block of information.
3. In the **Value** field, enter one of the following values:
   - `Y` to display a phone number in the Overview section.
   - `N` to not display phone number in the Overview section.
4. Save the value.

Update records for displaying the order of phone numbers

You can select the order of phone numbers that display in the Overview section of the Personal Information application.

Procedure

1. Open the GORICCR page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select the OVERVIEW.PHONE.TYPE setting and go to the next block of information.
3. In the **Value** field, select the Phone Type you want to display, which will replace (UPDATE_ME Priority 1).

   For example, PR for Permanent.
4. Verify that the value `1` displays in the **Sequence** field. You can update the number in the order you want the phone numbers to display.

   For example, 1 for first, 2 for second.
5. Save the value.

Add additional records for displaying the order of phone numbers

You also have the option of adding additional records for displaying the order of phone numbers in the Overview section of the Personal Information application.

Procedure

1. Open the GORICCR page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select Insert Record.
3. In the **Setting** field, enter `OVERVIEW.PHONE.TYPE`.
4. In the **Sequence** field, enter the number in the order you want the phone number to display.

   For example, 1 for first, 2 for second.
5. In the **Value** field, enter the Phone Type you want to display.

   For example, CAMP for Campus.
6. In the **Description** field, enter a value.

   For example, Personal Info Telephone 3.
7. Leave the **Translation** field blank.
8. Save the value.

Display optional Personal Information sections

The Personal Information application allows users to display their desired sections.

Related Links

Personal Information sections on page 38

Personal Details section

The Personal Details section displays the user's first, middle, and last names, the preferred first name, gender, date of birth, marital status, legal sex, personal pronoun, and gender identification (based on settings). The **Edit** button (enabled or disabled based on settings) displays in this section.

Display or hide Personal Details section

You can display or hide the Personal Details section in the Personal Information application.

Procedure

1. Open the GORICCR page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select the PERSONAL.DETAIL.SECTION.MODE setting and go to the next block of information.
3. In the **Value** field, enter one of the following values:
   - `0` to hide the Personal Details section.
   - `1` to display it without allowing updates.
   - `2` to display it and allow updates.
4. Save the value.

Edit personal details

You can edit the preferred first name, personal pronoun, gender identification, and marital status information in the Personal Details section.

Procedure

1. Click **Edit**.

   The **Edit Personal Details** window appears.
2. In the **Preferred First Name** field, enter the preferred first name.
3. From the **Personal Pronoun** list, select the personal pronoun.
4. From the **Gender Identification** list, select the gender identification.
5. From the **Marital Status** list, select the marital status.
6. Click **Update**.

   The `Saved Successfully` message appears.

Email section

The Email section displays the user's email type, email address, and comments for active email addresses set to display on the web. The word Preferred is displayed next to the email type for any preferred email addresses.

The **Add New** option button (enabled or disabled based on settings) is displayed in this section. The **Edit** and **Delete** option buttons (enabled or disabled based on settings) are displayed under each email item in this section.

Display or hide Email section

You can display or hide the Email section in the Personal Information application.

Procedure

1. Open the GORICCR page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select the EMAIL.SECTION.MODE setting and go to the next block of information.
3. In the **Value** field, enter one of the following values:
   - `0` to hide the Email section.
   - `1` to display it without allowing updates.
   - `2` to display it and allow updates.
4. Save the value.

Add email

You can add an email address in the Email section of the Personal Information application.

Procedure

1. Click **Add New**.
   The **Add Email** window appears.
2. From the **Email Type** list, select the email type.
3. In the **Email Address** field, enter the email address.
4. In the **Comments** field, enter any comments.
   You can enter a maximum of 60 alphanumeric characters.
5. Select the **Mark as Preferred** check box for the preferred email address.
6. Click **Add**.
   The `Saved Successfully` message appears.

Edit email

You can edit an email address in the Email section of Personal Information application.

Procedure

1. Click the **Edit** button under the email that you want to edit or update.

   The **Edit Email** window appears.
2. In the **Email Address** field, edit the email address as required.
3. In the **Comments** field, enter any new comments as required.

   You can enter a maximum of 60 alphanumeric characters.
4. Select the **Mark as Preferred** check box for the preferred email address, and the preferred email address will display first in the email list.
5. Click **Update**.

   The `Saved Successfully` message appears.

Delete email

You can delete an email address in the Email section of Personal Information application.

Procedure

Click the **Delete** button located under the email address that you want to remove.

The email address is removed and no longer displays on the landing page.

Phone Number section

The Phone Number section displays the user's active phone number type, area code, phone number, and extension. Unlisted and Primary are displayed next to the phone number type based on the settings.

The **Add New** option button (enabled or disabled based on settings) is displayed in this section. The **Edit** and **Delete** option buttons (enabled or disabled based on settings) are displayed under each phone number in this section.

Display or hide Phone Number section

You can display or hide the Phone Number section in the Personal Information application.

Procedure

1. Open the GORICCR page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select the PHONE.SECTION.MODE setting and go to the next block of information.

3. In the **Value** field, enter one of the following values:
   - `0` to hide the Phone Number section.
   - `1` to display it without allowing updates.
   - `2` to display it and allow updates.
4. Save the value.

Add phone number

You can add a phone number in the Phone Number section of the Personal Information application.

Procedure

1. Click **Add New**.
   The **Add Phone Number** window appears.
2. From the **Phone Type** list, select the phone type.
3. In the **Area Code** field, enter an area code.
4. In the **Phone Number** field, enter a phone number.
5. In the **Extension** field, enter a phone extension.
6. If applicable, enter an international access code and phone number in the **International Access Code** and **Phone Number** fields.
7. Click the **Unlisted** check box if you want to mark the phone number as unlisted.
8. Click **Add**.
   The `Saved Successfully` message appears.

Edit phone number

You can edit a phone number in the Phone Number section of the Personal Information application.

Procedure

1. Click the **Edit** button under the phone number that you want to edit or update.
   The **Edit Phone Number** window appears.
2. From the **Phone Type** list, select the new phone type you want.
3. In the **Area Code** field, enter the new area code you want.
4. In the **Phone Number** field, enter the new phone number you want.
5. In the **Phone Extension** field, enter the new phone extension you want.
6. If applicable, enter a new international access code and phone number in the **International Access Code and Phone Number** field.
7. Click the **Unlisted** check box if you want to mark the phone number as unlisted, then click again to clear it.
8. Click **Update**.

The `Saved Successfully` message appears.

Delete phone number

You can also delete the phone number in the Phone Number section of the Personal Information application.

Procedure

Click the **Delete** button located under the phone number that you want to remove.

The phone number is removed and no longer displays on the landing page.

Address section

The Address section displays the user's address type, current or future status, valid from and valid until dates, address lines 1 through 4 if applicable, city, state/province, county, zip/postal code, and country if applicable.

The **Add New** option button (enabled or disabled based on settings) is displayed in this section. The **Edit** and **Delete** option buttons (enabled or disabled based on settings) are displayed under each address item in this section.

Display or hide Address section

You have the option of displaying or hiding the Address section in the Personal Information application.

Procedure

1. Open the GORICCR page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select the ADDRESS.SECTION.MODE setting and go to the next block of information.
3. In the **Value** field, enter one of the following values:
   - `0` to hide the Address section.
   - `1` to display it without allowing updates.
   - `2` to display it and allow updates.
4. Save the value.

Add address

You can add an address in the Address section of the Personal Information application.

Procedure

1. Click **Add Address**.
   The **Add Address** window appears.
2. From the **Address Type** list, select the address type.
3. In the **Valid From** field, enter a valid date in the MM/DD/YYYY format.
4. In the **Valid Until** field, enter a valid date in the MM/DD/YYYY format.
5. Enter an address in the **Address Line 1** field.
6. Enter an address in the **Address Line 2** field.
7. Enter an address in the **Address Line 3** field.
8. Enter a city in the **City** list.
9. From the **State/Province** list, select a state or province.
10. From the **County** list, select a county.
11. Enter a zip/postal code in the **Zip/Postal Code** field.
12. From the **Country** list, select a country.
13. Click **Add**.
    The `Saved Successfully` message appears.

Edit address

You can edit an address in the Address section of the Personal Information application.

Procedure

1. Click the **Edit Address** button under the address that you want to edit or update.
   The **Edit Address window** is displayed.
2. In the **Valid From** field, edit the valid from date as required.
3. In the **Valid Until** field, edit the valid until date as required.
4. In the **Address Line 1 - Address Line 3** fields, enter new addresses as required.
5. In the **City** list, enter a new city as required.
6. From the **Country** list, select a new country if required.
7. From the **State/Province** list, select a new state or province as required.
8. From the **County** list, select a new county as required.
9. Enter a new zip/postal code in **Zip/Postal Code** field as required.
10. From the **Country** list, select a country as required.

11. Click **Update**.

    The `Saved Successfully` message appears.

Delete Address

You can delete an address in the Address section of the Personal Information application.

Procedure

Click the **Delete** button located under the address that you want to remove.

The address is removed and no longer displays on the landing page.

Emergency Contact section

The Emergency Contact section displays the order number, user's first, middle, and last names, relationship, area code, phone number, phone extension, address lines 1 through 4 if applicable, city, state/province, zip/postal code, and country if applicable.

The **Add New** option button (enabled or disabled based on settings) is displayed in this section. The **Edit** and **Delete** option buttons (enabled or disabled based on settings) are displayed under each address item in this section.

Display or hide Emergency Contact section

You can display or hide the Emergency Contact section in the Personal Information application.

Procedure

1. Open the GORICCR page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select the EMERGENCY.CONTACT.SECTION.MODE setting and go to the next block of information.
3. In the **Value** field, enter one of the following values:
    - `0` to hide the Emergency Contact section.
    - `1` to display it without allowing updates.
    - `2` to display it and allow updates.
4. Save the value.

Add emergency contact

You can add an emergency contact in the Emergency Contact section of the Personal Information application.

Procedure

1. Click **Add New**.
   The **Add Emergency Contact** window appears.
2. From the **Order** list, select an order number.
3. In the applicable fields, enter the emergency contact's information.
4. Click **Add**.
   The `Saved Successfully` message appears.

Edit emergency contact

You can edit an emergency contact in the Emergency Contact section of the Personal Information application.

Procedure

1. Click the **Edit** button under the emergency contact that you want to edit or update.
   The **Edit Emergency Contact** window appears.
2. From the **Order** list, select a new order number.
3. In the applicable fields, edit the emergency contact's information as required.
4. Click **Update**.
   The `Saved Successfully` message appears.

Delete emergency contact

You can delete an emergency contact in the Emergency Contact section of the Personal Information application.

Procedure

Click the **Delete** button located under the emergency contact that you want to remove.

The emergency contact is removed and no longer displays on the landing page.

Additional Details section

The Additional Details section displays the user's ethnicity and race, veterans classification, and disability status information.

The Ethnicity and Race section displays ethnicity as Hispanic or Latino or Not Hispanic or Latino, followed by race such as Asian, Korean. The Veterans Classification section displays veteran classifications such as Disabled Veteran and the Date of Discharge. Disability Status displays a status such as No, I don't have a disability. The **Edit** button (enabled or disabled based on settings) is displayed under each item in this section.

Display or hide Ethnicity and Race section

You can display or hide the Ethnicity and Race section in the Additional Details section.

Procedure

1. Open the GORICCR page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select the ETHNICITY.RACE.MODE setting and go to the next block of information.
3. In the **Value** field, enter one of the following values:
   - `0` to hide the Ethnicity and Race section.
   - `1` to display it without allowing updates.
   - `2` to display it and allow updates.
4. Save the value.

Display or hide Veterans Classification section

You can display or hide the Veterans Classification section in the Additional Details section.

Procedure

1. Open the GORICCR page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select the ENABLE.VETERAN.CLASSIFICATION setting and go to the next block of information.
3. In the **Value** field, enter one of the following values:
   - `N` to hide the Veterans Classification section.
   - `Y` to display it and allow updates.
4. Save the value.

Display or hide Disability Classification section

You can display or hide the Disability Classification section in the Additional Details section.

Procedure

1. Open the GORICCR page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select the ENABLE.DISABILITY.STATUS setting and go to the next block of information.
3. In the **Value** field, enter one of the following values:
   - `N` to hide the Disability Classification section.
   - `Y` to display it and allow updates.
4. Save the value.

   Note: If the value is `N` for ENABLE.VETERAN.CLASSIFICATION and ENABLE.DISABILITY.STATUS and the value is `0` for ETHNICITY.RACE.MODE, the Additional Details section will not display.

Edit ethnicity and race

You can edit an ethnicity and race item in the Ethnicity and Race section.

Procedure

1. Click the **Edit** button under the Ethnicity and Race item you want to edit.

   The **Update Ethnicity and Race** window appears.
2. Select one of the following options:
   - Not Hispanic or Latino
   - Hispanic or Latino
3. Under ‘Select one or more races to indicate what you consider yourself to be’, select the race.
4. Click **Ask Me Later** to return to the landing page or click **Continue**.
5. Click **Save** to save the changes, or **Cancel** to return to the previous page.

   The `Saved Successfully` message appears.

Edit veterans classification

You can edit a veterans classification item in the Veterans Classification section.

Procedure

1. Click the **Edit** button under Veterans Classification.

   The **Edit Veterans Classification** window appears.

2. Click the View More link to read more information about the Veterans Classification section.
3. Select one or more of the first four option buttons for your Veterans classification.
   For example, I identify as one or more of the classifications of protected veteran listed.
4. Select one of the following check boxes:
   - Disabled Veteran
   - Active wartime or campaign badge veteran
   - Armed forces service medal veteran
5. In the **Date of Discharge** field, enter the date of discharge in the MM/DD/YYYY format.
6. Click **Update** or select one of the following options:
   - I am a protected veteran, but I choose not to self-identify the classification to which I belong.
   - I am not a protected veteran.
   - I am not a veteran.
7. Click **Update**.
   The `Saved Successfully` message appears.
8. Click **Cancel** to close the Edit Veteran Classification section .

Edit disability status

You can edit a disability status item in the Disability Status section.

Procedure

1. Click **Edit** button under the Disability Status.
   The **Edit Disability Status** window appears.
2. Click the View More link to read more information about the Disability Status section.
3. Select one of the following options:
   - YES, I HAVE A DISABILITY (or previously had a disability).
   - NO, I DON'T HAVE A DISABILITY.
   - I DON'T WISH TO ANSWER.
4. Click **Update**.
   The `Saved Successfully` message appears.
5. Click **Cancel** to close the Edit Disability Status section.

Other section

The Other section displays links to the Directory Profile, Security Questions and Answers and the Change Password pages.

Display or hide Directory Profile section

You can display or hide the Directory Profile section in the Other section.

Procedure

1. Open the GORICCR page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select the ENABLE.DIRECTORY.PROFILE setting and go to the next block of information.
3. In the **Value** field, enter one of the following values:
   - `N` to hide the Directory Profile section.
   - `Y` to display it and allow updates.
4. Save the value.

Display or hide Security Questions and Answers section

You can display or hide the Security Questions and Answers section in the Other section.

Procedure

1. Open the GORICCR page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select the ENABLE.SECURITY.QA.CHANGE setting and go to the next block of information.
3. In the **Value** field, enter one of the following values:
   - `N` to hide Security Questions and Answers section.
   - `Y` to display it and allow updates.
4. Save the value.

Display or hide Change Password section

You can display or hide the Change Password section in the Other section.

Procedure

1. Open the GORICCR page in the Administrative Banner application and search for the PERSONAL_INFORMATION_SSB process.
2. Select the ENABLE.PASSWORD.CHANGE setting and go to the next block of information.

3. In the **Value** field, enter one of the following values:
   - `N` to hide the Change Password section.
   - `Y` to display it and allow updates.
4. Save the value.

   Note: If the value is `Y` for any of these items, the Other section will display. If the value is N for all these items, the Other section will not display. Enter the value `Y` or `N` to display or not display Directory Profile, Security Questions and Answers, or Change Password links in the Other section.

Edit directory profile

You can specify the personal information that will appear in their campus directory profile.

Procedure

1. Click the Directory Profile link.
   The **Directory Profile** window appears.
2. Click the check boxes for the items you want to include in your directory profile.
3. Click **Update** to save your selections or **Cancel** to close the window.

   Note: The page details and setup can be found in Banner Web General User Guide 8.7.1.

Edit security questions and answers

The Banner Self-Service products use security questions and answers to help users who forget their passwords.

Procedure

1. Click the Security Questions and Answers link.
   The **Security Question and Answer** window appears.
2. In the **Confirm Your Pin** field, enter your PIN.
3. From the **Select or Define Question (number)** list, enter or select a question.
4. In the **Answer (number)** field, enter an answer to the question.
5. Click **Update** to save your selections or click **Cancel** to close the window.

Change password

Users can change their own password by following the steps below.

Procedure

1. Click the Change Password link.
   The **Forgot Password** window appears.
2. To each of the questions in the **Answer*** field, enter an answer in lower case letters.
3. Click **Continue**.
   The **Reset Password** window appears.
4. In the **New Password** field, enter your new password.
5. In the **Re-Enter Password** field, enter your new password again.
6. Click **Submit** to save your new password or click **Cancel** to close the window.

