HOW TO ADD, UPDATE, OR SEARCH FOR A PERSON IN BANNER HRIS
Identification Form (PPAIDEN)

General

The Identification Form (PPAIDEN) is used to store biographic data. This form enables you to enquire, create or modify the data.

Check List

Before you proceed, you must have the following information:

- The person's last and first name
- The person's birth date
- Any other identifying information such as the Social Insurance Number.

Remember: The bottom left of the form displays errors and warnings. This area is referred to as the auto-hint line and should be consulted if you are experiencing any problems. Even if you are not experiencing difficulties you should always keep an eye on this bar, especially if you are updating fields, as it provides important information such as warnings and errors that do not necessarily block your progress.

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Accessing the "Identification Form" (PPAIDEN)

Type the name of the form PPAIDEN in the Direct Access field.

The adjacent screen will appear:

Note: Numbers have been added to the adjacent form to help find and identify the different fields. These numbers correspond to the table below, which defines or explains each field's purpose.

You must enter both **Last** and **First Names** in the Person Name Information section. Do not use the Non-Person Information section as this is only applicable to FIS.

Fields that have a red check mark (✓) in the **Req'd** column are required fields and need to be filled in with the appropriate data (see **Explanation/ Description** column for details).

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
Note: When you first enter the Identification Form (PPAIDEN) make sure that you execute a query to determine if the person you are interested in already exists in the system. If the person *does* exist you can then select his/her corresponding ID number and add or change any information you desire. If the person *does not* exist you then generate a new ID number for them and fill in the appropriate information.						
✓	1.	ID	Enter or Search for ID, OR have the	The value you entered here will also	Required Field. You should only type in the	Form referenced: Person Search (SOAIDEN)

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
			system generate an ID using the **Generate ID** Field.	be inserted into the **ID** field in the Current Identification Information section. All information Pertaining to this ID will be automatically filled in by Banner.	9-digit code if you know it. Make sure that Banner returns the person you are searching for. If you do not retrieve the right person, click Rollback and execute a search query by clicking ID.	Non-Person Search (SOACOMP)
✔	2.	Generate ID	Select the **Generate ID** button to have Banner generate a sequential ID number.	The word "*GENERATED*" is automatically filled into the ID fields.	Do not override the word "GENERATED"!	
✔			Proceed to the **Next Block** by clicking the icon or by pressing Ctrl + Page Down on your keyboard.			

Current Identification:

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
	3.	ID			Automatically filled in by Banner from the Key **ID** field.	
✔	4.	SSN/SIN/TFN	Enter the Social Insurance Number.		Required Field. Social Insurance Number SIN - Use Canadian number only. NOTE: If the SIN you entered is incorrect, a warning message will appear in the *Auto-hint Line:* Warning* Invalid Social Insurance Number.	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
					You must correct the number before proceeding to the next block.	
	5.	Name Type			Name Type. The name type associated with the name the person is identified on the main window. Examples are casual name, maiden name, and original name. Use of name types is optional. The name specified on the main window is used to identify the person or non-person on all Banner forms. It appears on all paycheques and year-end regulatory forms issued for an employee. Note: Alternate names for the person or non-person can be specified on the *Alternate Identification window* of PPAIDEN. Alternate names will not affect any HR processes. The name type can be changed on PPAIDEN. Name-type changes are recorded and are displayed in the Alternate Identification window of PPAIDEN so you can search on a current or	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
					former name-type change.	
Person Name Information:						
✔	6.	Last Name	Enter the person's last name.		Required field. The last name of the individual you are entering into the system. NOTE: All names are case sensitive and follow the McGill Banner Data Entry Standards. e.g. Smith	
✔	7.	First Name	Enter the person's first name.		Required field. The first name of the individual you are entering into the system. NOTE: All names are case sensitive and follow the McGill Banner Data Entry Standards. e.g. Marie	
	8.	Middle Name			Optional field. The middle name of the individual you are entering into the system. NOTE: All names are case sensitive and follow the McGill Banner Data Entry Standards. e.g. Anne	
	9.	Prefix			Optional field. The prefix of the individual you are entering into the system.	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
					e.g. Dr, Mrs, etc. (prefixes are entered without any punctuation)	
	10.	Suffix			Optional field. The suffix of the individual you are entering into the system. e.g. Jr, III, etc.. (suffixes are entered without any punctuation)	
	11.	Pref. First Name			Optional field. Use this field when a person prefers to be addressed as something other than their legal first name.	
Non-Person Name Information:						
	12.	Name			Human resources does not use this field.	
✔		Save	Click the **Save** icon.	The new 9-digit long ID number will be generated. *Auto-hint line:* *"*Transaction complete: 1 records applied and saved*".*	Performing a **Save** commits all the data entered to the database.	

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Biographic Information Window:

The *Biographic Information Window* collects name and demographic information, including birth date, gender, ethnic classification, marital status, and citizenship status.

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
✔	1.	Date of Birth	Enter date of birth. The data entry standards are YYYY-MM-DD.	Banner calculates the person's age and fills in the **Age** field.	Required field for all employees.	
✔			Proceed to the **Next Block** by clicking the icon or by pressing Ctrl + Page Down on your keyboard.			
	2.	Age			Maintained by Banner. Banner calculates the person's age using the date of birth field.	
	3.	Ethnicity	Double-click in this field and select NA.	NA - Not Applicable defaults in.	Required field for all employees. The ethnic origin of the individual you are entering into the system. **McGill will not be using this field.**	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
✔	4.	Gender	{Select} the appropriate radio button, Male, Female or Not Available.		Required field for employees.	
✔	5.	Marital Status	Enter or {Search} for the marital status code.	Banner automatically fills in the description.	Optional field. The marital status of the individual you are entering into the system. e.g. **S** = Single	
✔	6.	Citizenship	Enter or {Search} for the citizenship code.	Banner automatically fills in the description.	Required field for employees. Indicates whether the individual you are entering into the system is a citizen or not. **Y** - Canadian/Permanent Resident **N** - Non-Canadian	
✔	7.	Deceased Ind	Check this box if the person is deceased.		Required field if applicable. If the employee is deceased this box should be checked and the **Date** of death field should be filled in. NOTE: This does not stop an employee from being paid. The employee must be terminated at both the jobs and employee status level for payment to end.	
✔	8.	Date	Enter date of death. The data entry standards are YYYY-MM-DD.	Banner calculates the person's age at death and fills in the **Age** field.	Required field if applicable. Date of death.	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
	9.	Age			Maintained by Banner. The employee's age at the time of death. (calculated by the system)	
✓		Save	Click the {Save} button. Then the X (close) Button at the top right hand corner of the screen.	*Auto-hint line:* "Transaction complete: 1 records applied and saved".		

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Address Information Window:

The *Address Information Window* collects address and telephone information. Multiple addresses can be entered and identified by effective dates, and multiple telephone numbers can be entered for each address type.

Addresses are required for employees.

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
✔	1.	Type	Enter or {Search} for the address type code.	Banner automatically fills in the description.	Required field. Address type. e.g. **MA** - Mailing address	
✔	2.	Address	Enter the street address or P.O. Box.		Required field. The street address or P.O. Box. At least one line is required. Each line can contain up to 30 characters.	⇨ Addresses (PPIADDR)
	3.	Seq #			Maintained by Banner. Allows the user to establish more than one address of the same address type. New sequence numbers will	

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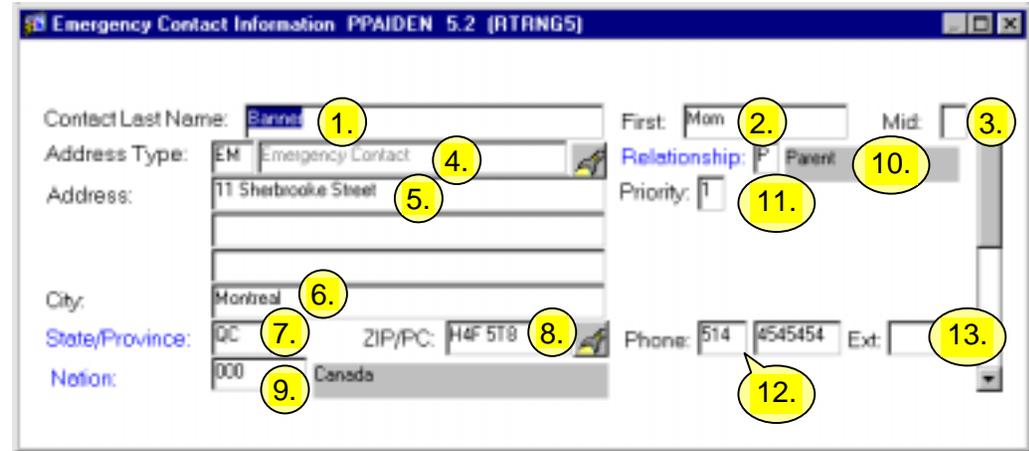| Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
					generate whenever more than one address of the same type exists.	
✔	4.	City	Enter the name of the city.		Required field. Name of the city. 20-character field limit.	
✔	5.	State/Prov	Enter or {Search} for the state or province code.	Banner automatically fills in the description.	Required field. The 2-character code for the Canadian province or state. e.g. **QC** - Quebec	
✔	6.	ZIP/PC	Enter the ZIP/PC code.		Required field. The 11-character code for the postal code or zip code.	
	7.	County			McGill does not use this field.	
✔	8.	Nation	Enter or {Search} for the nation code.	Banner automatically fills in the description.	Optional field. The country or nation. e.g. **27** - Canada	
✔	9.	Phone	Enter the contact's telephone number preceded by the area code and followed by the extension number if applicable.		Optional field. The phone number of the contact preceded by the area code and followed by the extension number if applicable. A single phone number can be entered here, or the user can enter several phone numbers for this person by clicking on the flashlight icon. This will access the Telephone Form (PPATELE).	
✔	10.	Type	Enter or {Search} for the telephone		Optional field. The type of phone number	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
			type.		that is associated with this address. It will default to **REG** but can be overridden. e.g. **REG** - Regular Non McGill Number.	
	11.	From			Banner maintains this field. However, it can be overridden with the effective start date of the address associated with this individual.	
	12.	To			Optional field. The effective end date of the address associated with this individual.	
	13.	Inactive			Optional Field. *Check* this box if this address is no longer active.	
	14.	Source			Optional field. Address Source Code. How the information was received. e.g. **CALL** - phone call from the individual.	
	15.	User			Maintained by Banner. Displays the User ID of the person who logged in.	
	16.	Delivery			Takes you to the *Delivery Information Window*.	
	17.	Activity Date			Maintained by Banner.	
✔		Save	Click the {Save} button. Then the X	*Auto-hint line:* Transaction	The save button commits all data entered from all	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
			(close) Button at the top right hand corner of the screen.	complete: 1 records applied and saved.	windows of the current form to the database.	

Emergency Contact Information Window:

The *Emergency Contact Information Window* collects the name(s) of the person(s) the employee or student wishes to have contacted in the event of a personal emergency. This list may be prioritised according to the order in which the contacts should be notified of an emergency.

All information in this window is optional. If you do choose to maintain this information, the **Name** and **Priority** fields are required.

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
✔	1.	Contact Last Name	Enter the contact's last name.		Required field. Last name of the contact person.	
✔	2.	First	Enter the contact's first name.		Required field. First name of the contact person.	
	3.	Mid			Optional field. Middle name of the contact person.	
✔	4.	Addr Type	Enter **EM** - Emergency Contact.	Banner automatically fills in the description.	Required field. Address type.	
✔	5.	Address (Street)	Enter the contact's street or P.O. Box.		Required field. The street address or P.O.	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
					Box of the contact. At least one line is required by the system.	
✓	6.	City	Enter the contact's city.		Required field. The city of the contact.	
	7.	State/Prov	Enter or {Search} for the province or state code.	Banner automatically fills in the description.	Optional field. The province or state code. e.g. **QC** - Quebec	
	8.	ZIP/PC			Optional field. The zip or postal code of the contact.	
✓	9.	Nation	Enter or {Search} for the nation code.	Banner automatically fills in the description.	Required field. The country or nation of the contact. e.g. **27** - Canada	
✓	10.	Relationship	Enter or {Search} for the relationship code.	Banner automatically fills in the description.	Required field. The relationship code describing the contact's relation to the employee or student.	
✓	11.	Priority	Enter the contact priority number.		Required field. The number indicating the order of contact priority for this person.	
✓	12.	Phone	Enter the contact's telephone number preceded by the area code.		Required field. The telephone number of the contact preceded by the area code.	
	13.	Ext	Enter the contact's telephone extension number if applicable.		The telephone number extension of the contact (if applicable).	
✓		Save	Click the {Save} button. Then the X	*Auto-hint line:* Transaction	Required field. The save button commits	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
			(close) Button at the top right hand corner of the screen.	complete: 1 records applied and saved.	all data entered from all windows of the current form to the database.	

Additional Information Window:

Note: At present we do not expect to use the Additional Information Window as it is used to support U.S. information.

Alternate Identification Window:

You can access this window by clicking on "Alternate Name/IDs" in the Navigation Frame. Use this window either to specify alternate names or IDs by which a person can be identified or to view previous or alternate names or IDs assigned to the person.

Note: Complete the Change field before entering an alternate name or ID.

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
	1.	Alternate ID			Current, previous, or alternate ID for the person. You can enter an alternate ID, or you can view previous or alternate IDs assigned to the person.	
Alternate Name						
	2.	Last Name			Current, previous, or alternate last name for a person. You can enter an alternate name, or you can view previous or alternate names assigned to the person or non-person.	
	3.	First name			Current, previous, or alternate first name of a person.	
	4.	MI			Current, previous, or alternate middle name of a person.	
	5.	Name Type			Name Type (Alternate) The name type associated with the name that you are currently viewing or are entering for the person. Each alternate name of the person can be associated with a different name type. Only one name can, however, be entered for each type. As part of this	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
					rule, a person can only have one name with a blank name type. Note: When you change the name of a person or non-person, you must assign a name type that has not previously been used for that person. This is true even if the name type associated with the original name was blank.	
✓	6.	Change			Change Pull-down list that indicates the type of alternate information to be specified on this window. You can change the ID or the name of a person. **Name** - An alternate name is to be specified. This value is stored in the database as an N. **ID** - An alternate ID is to be specified. This value is stored in the database as an I.	
	7.	Activity date			Activity Date (For Alternate Identification) The date the currently displayed alternate or previous name or ID was entered for the person.	
	8.	Alternate Remove			Remove all the alternate information.	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
✔		Save			The Save button commits all the data entered to the database.	

Legal Name:

Note: We do not expect to use the *Legal Name Window*.

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