HOW TO RECORD GENERAL INFORMATION FOR A BACKGROUND INSTITUTION IN BANNER SIS
Background Institution Base Form (SOASBGI)

General:

The *Background Institution Base Form* is used to record general information. The source or institution must first be established on STVSBGI (Source/Background Institution Validation Form).

Related Documentation:
How to Record Yearly Information for a Background Institution in Banner (SOABGIY)

Check List:

Before you proceed, you should have as much of the following information as possible:

- ❖ Full Address of Institution
- ❖ Telephone Number of Institution
- ❖ Fax Number of Institution (if available)
- ❖ Contact Name at Institution (if available)
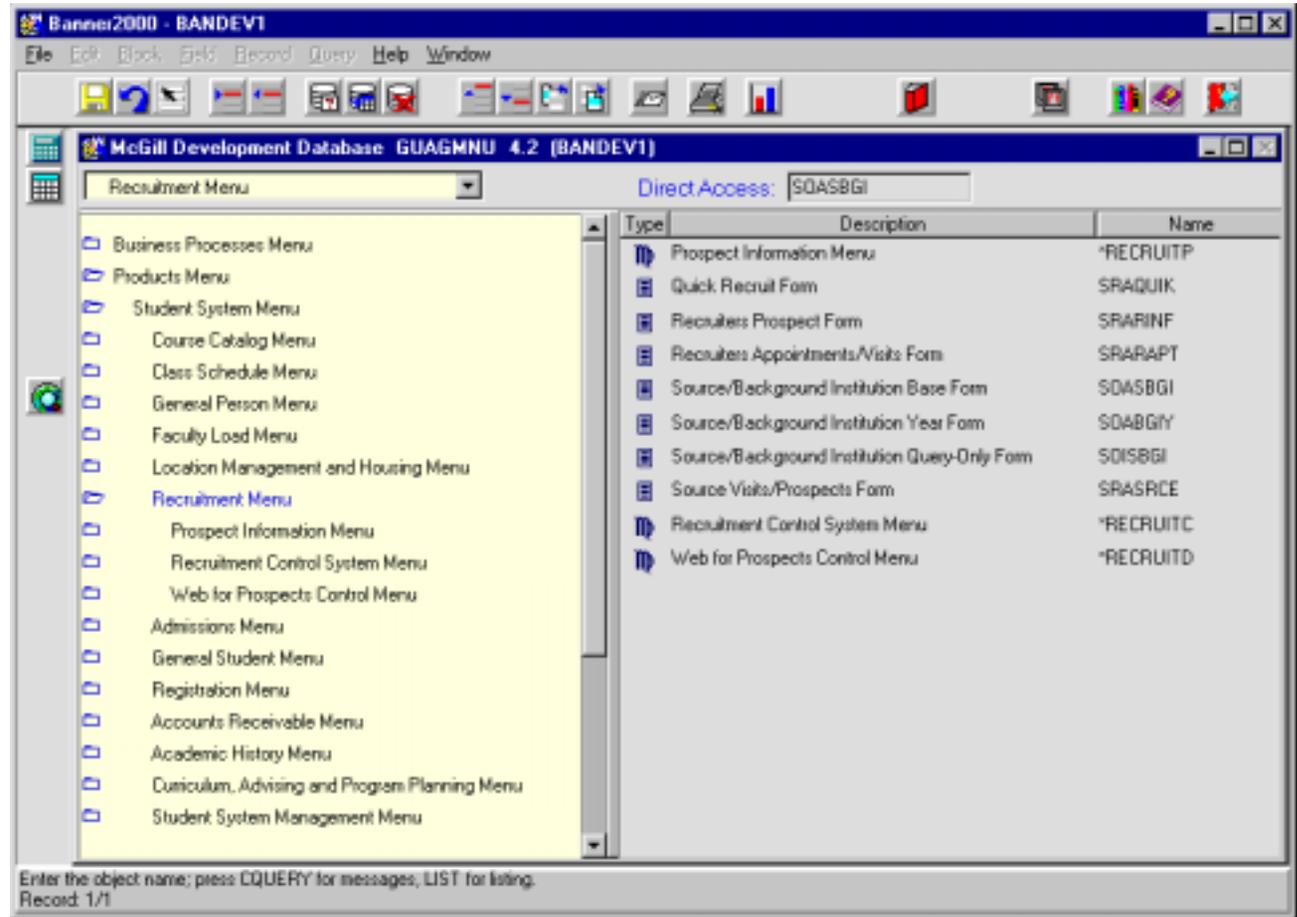- ❖ MEQ Number (if Quebec institutution)

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.

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Accessing the "Source/Background Institution Base Form" (SOASBGI)

Type the name of the form SOASBGI in the Direct Access field.
(OR)

Use the Menu Selection:
1) *Access* Products Menu
2) *Select* Student System Menu
3) *Select* Recruitment Menu
4) *Select* Source/Background Institution Base Form (SOASBGI)

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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.

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
	1.	Source/Background Institution	A known code can be entered in the source field or a search can be initiated.			Query form referenced: Source/Background Institution Query-only form (SOISBGI)
✔			Proceed to the **Next Block** by clicking the icon, or by pressing Ctrl + Page Down on your keyboard.			

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
**Source/Background Institution Address Information**: The address information provided on this form is displayed in Academic History and Admissions. Only one address can be maintained in this section. International addresses need to be entered in the manner in which they should appear on mailing addresses. This means that the city field will often contain more information than city. Keep in mind that mailing labels will be printed in the following field order: address lines 1-3, city, province/state, country (if not Canada), postal code. See the end of this document for some address standards.
	2.	Address			Street address.	
✓	3.	City	A city must be entered.		Enter all information that would normally appear on the city line prior to state/province or country. If there is an international province enter it immediately after the city – it cannot be entered in the state/province field. If there is a postal code that normally appears immediately before or after the city and prior to the country, enter it in the city field and not in the zip/postal code field. The address needs to be entered in a way that will be appropriate for mailing label generation. See address standards at the end of this document.	
	4.	State/Province			Enter province if Canada or state if USA.	Validation form referenced: State/Province Code Validation form (STVSTAT)
✓	5.	ZIP/Postal Code			If a state/province is entered, a postal or zip code must also be entered. An international postal code can also be entered here if it normally appears after the country. If a valid ZIP code is	Validation form referenced: Zip/Postal Code Validation form (GTVZIPC)

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
					entered in the ZIP/PC field, the City, State and Nation information which exists in the ZIP/Postal Code Validation Form (GTVZIPC) will default into the appropriate fields. Hit the ENTER key after entering the zip code for the information to default in.	
	6.	County	Field not being used by McGill.		County. **DO NOT USE THIS FIELD.**	
	7.	Nation			Country code. See address standards at the end of this document.	Validation form referenced: Nation Validation form (STVNATN)
✓			Proceed to the **Next Block** by clicking the icon, or by pressing Ctrl + Page Down on your keyboard.			

Institution Contacts:
- This section carries contact persons and their associated phone numbers as well as contact types and their associated data.
- More than one contact can be saved for a school.
- More than one name/phone can be maintained for the same contact type.
- A contact name and phone number can be saved without saving a person type.
- Data must be entered in the contact person field before a person type or phone number can be entered.
- When there are numerous contact types, they will appear in alpha order according to the information in the contact person field.

To enter a new Contact: **F6** or select *Record* on the menu and then *Insert*. Type the data in and then select the save icon.
To remove a Contact: **ShiftF4** or select *Record* on the menu and then *Remove*. Click on the save icon.

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
	8.	Contact (Person) Data			The Contact (Person) field is 60 characters in length. Here you should enter the data associated with the Contact (Person) type. The data can be a person's name or an ID number associated with the Contact (Person) Type.	

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| | 9. | Person (Contact) Type | | | There are currently five values:
• **CTX** School Contact Person: Enter the Person's name in the Contact Person field and enter their phone number in the phone boxes opposite the person type.
• **TEL** School Phone Number: Enter 'General Phone Number' in the contact person field and the actual school phone number in the phone boxes.
• **FAX** School Fax Number: Enter 'General Fax Number' in the contact person field and the actual school fax number in the phone boxes.
• **MEQ** Ministry Education Quebec: this is the 6 character MEQ code assigned to all Quebec schools. It MUST be entered if you are adding a new Quebec institution.
• **ETS** Educational Testing Service: This is reserved for loading the school's College Board code. Codes are loaded automatically from the CB school tapes. | Validation form referenced: Person Type Validation form (STVPTYP) |
| ✔ | | | Proceed to the **Next Block** by clicking the icon, or by pressing Ctrl + Page Down on your keyboard. | | | |

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Comments/Directions, Text Information					
	10.	Comments			Numerous lines of comments can be entered. The text does not wrap around to the next line. The comment box will be larger and will wrap in version 5 of Banner. It is expected that this field will be used by Recruiting staff.	

- **Address Standards:**

- enter international provinces on the city line following the city
  Examples: Australia: Sydney NSW

- enter international postal information on the city line if it normally appears immediately before or after city:
  Examples: Austria: A-1220 Vienna
                              France: 75015 Paris
                              Germany: 22605 Hamburg
                              Switzerland: 2000 Neuchatel
                              Norway: 0205 Oslo
                              Japan: Tokyo 150
  (this will not impact on our ability to find schools in a particular city – we can still use wild cards such as %Paris%)

- enter England, Scotland, Wales as the country, NOT United Kingdom.   The UK designation will be added after the country description. The 'United Kingdom' value in the nation table will be used for citizenship.

- Puerto Rico and Virgin Islands are located in the State table.

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