

Data Standards

For Otis College of Art and Design

I. Introduction

This document defines standards and guidelines to ensure consistent entry of data into databases used at Otis College. The purpose of having the standard is to prevent duplicate entries in the database and to facilitate meaningful database search criteria. Since some databases will be used by programs throughout Otis College, it is important that the standard be implemented across the college to facilitate information sharing between different database systems deployed at Otis College. This standard follows the U.S. Post Office standards as defined in Publication 28 – Postal Addressing Standards for name format and address entry at Otis College.

General Rules for Clean and Accurate Entity Records

Throughout this document, the word ‘entity’ is used as a blanket term for person (student or employee), vendor, or organization.

There are three general rules for creating clean entity records in Banner. These three rules are as follows:

General Rule 1: Search first.

Before you create a new record for an entity, conduct an ID and name search to ensure that the entity in question does not already exist in the Banner database. If the entity does exist, do not create a new record because this will create a *duplicate* record for the same entity. Searching procedures are described in the section *Entry of a General Person / Non-Person Information* below of this document.

General Rule 2: Enter and modify data only when authorized to do so.

Make changes to data only when you have the proper authority. Built-in Banner security does not cover all circumstances, and it cannot prevent all inappropriate changes to data. For example, Banner security can control who can modify addresses. For business reasons, however, specific address *types* require specific guidelines regarding who can update addresses of those types. Data entry policies and protocols are described in Section II through IV of this document.

General Rule 3: Follow the data entry rules.

Many key data fields have specific data entry rules that govern the use of punctuation; abbreviations of words; the use of uppercase versus lowercase letters of the alphabet; the correct formulation of addresses; and so on. These rules are described in Sections II through IV of this document.

The above general rules should be extended to other database systems used at Otis College

Administrative Responsibility

By law, certain electronic institutional data is confidential and may not be released without proper authorization. Employees will adhere to all applicable federal laws, state laws, and college policies concerning storage, retention, use, release, and destruction of data.

All levels of management will ensure that, for their areas of accountability, each employee knows his/her responsibilities with regard to data management. Every employee who is responsible for data entry (directly or indirectly) must read and understand this document before accessing the system.

Electronic data is owned by the College and is a vital asset. All institutional data, whether maintained in the central database or other data systems (including microcomputers), remains the property of the College. Access to data is not approved for use outside an individual's official employment responsibility.

Institutional data will be used only for the legitimate business of the College. Administrative computing services and facilities will be used only as required in the performance of job functions.

Managers and supervisors must ensure a secure office environment with regard to all institutional information systems. Managers and supervisors must validate the access requirements of their staff according to job functions, before requesting access to administrative computing systems.

Employees must ensure confidentiality and protection of data by either logging completely out of the system or locking their workstation when away from their desk. All users must log out at the end of the day. Employees should protect their usernames and passwords. Usernames and passwords must not be shared with others.

As a general principle of access, college data (regardless of who collects or maintains it) shall be shared among those employees whose work can be done more effectively by knowledge of such information.

Although the College must protect the security and confidentiality of data, the procedures to allow access to data must not unduly interfere with the efficient conduct of College business. As a practice, data is primarily stored on the College's servers, although other media may be used for secondary storage of data. Offices will work with the IT Group to determine if it is appropriate to use secondary storage. If secondary storage is determined to be needed, the IS Group will help in the selection of hardware and procedures to save guard the College data.

Data Custodians

An employee is a data custodian by virtue of his/her position at the College as outlined in the table below. A data custodian may make data available to others within his or her purview for use and support of the department's functions.

Before granting access to data, the data custodian shall be satisfied that data protection requirement has been implemented and that "need to know" is clearly demonstrated. By approving end-user access to institutional data, the data custodian consents to the use of this data within the normal business functions of administrative and academic departments.

Data custodians are responsible for training on data inquiry and maintenance functions within their respective modules, in cooperation with the Information Services group (IS.)

Data custodians are responsible for the accuracy and completeness of data in their areas. Misuse or inappropriate use by individuals will result in revocation of the user's access privileges and could result in additional college disciplinary measures. Data custodians are also responsible for the maintenance and control of the administrative information system's validation and rule tables, and the validation and approval of software releases that affect their areas of responsibility. Table 1 defines the area of responsibility for the Data Custodian's.

| AREA of RESPONSIBILITY | DATA CUSTODIAN |
|---------------------------|---------------------------------------|
| Admissions | Dean of Admissions |
| Student System | Registrar |
| Finance Systems | Controller |
| Financial Aid Systems | Director of Financial Aid |
| General Systems | Database Manager |
| Human Resources | VP of Human Resources and Development |
| Institutional Advancement | VP of Institutional Advancement |
| Student Accounts | Director of Student Accounts |

Table 1

Disclosure of Data

It is each user's responsibility to be aware of and abide by all applicable laws and policies mandated by each department as well as the following:

- Disclosure of information is restricted to data custodians or their representatives. Contact the appropriate department prior to disclosure of information;
- Users must be aware of federal regulations, state laws, and college policies applicable to data under the jurisdiction of their offices. Specific examples include Family Educational Rights and Privacy Act (FERPA) and Health Insurance Portability and Accountability Act (HIPAA);
- Certain data associated with individuals is private and shall be used only for the legitimate business of the College.

Multiple Entries

In any shared database there should be only one record for an individual entity, whether a person, company, organization or vendor. It is critical that new entries do not duplicate existing records for the same entity—search thoroughly before adding a new entry. If a multiple record is created or identified, the supervisor or manager should be notified immediately.

The existence of multiple identity records for one entity defeats the purpose of a relational database and raises questions as to the integrity of the data stored with these records.

Results of such data integrity problems may include:

- invalid reports
- inaccurate contacts
- a perception of carelessness
- embarrassment to the College
- non-compliance with governing agencies

Each identified duplicate record takes hours to analyze and repair. Be careful! The Information Systems group will review reports frequently to check for duplicate records.

The procedure for resolving multiple entries in Banner is located ???.

Name Change Report

If a name is changed, the record is retained for the purpose of mentoring and reconciling requisite documentation.

Access to Official College Records

The following outlines the requirements and limitations for all employees to follow in obtaining permission for inquiry and update access to the College's official records. Data security is the responsibility of all and must be impressed upon all employees by training accomplished in conjunction with the use of the College's data systems.

All requests for information access will be coordinated through functional area data custodians. Each person requesting new access, changes to current access or termination of access will make the request through the data custodian for their area. Data custodians will modify requests as necessary. Only those requests submitted to IS by the data custodians will be put into effect. Data users must have relevant data usage advisories approved through the area data custodian.

Requests from data custodians seeking new user IDs and passwords will ensure that the requested access is commensurate with completion of any required general system training as well as required departmental specific training. The new user will have read this document prior to an account and password being issued. Account and password information will be transmitted directly to the user by the data custodian. IS will issue the account and password only to the individuals data custodian.

Departments should take steps to ensure that they have an alternate person assigned as backup for each office function. This individual must have access to the system functions required to perform these back-up functions.

Each user of administrative information is assigned appropriate combinations of inquiry-only and update access to specific parts of the administrative information system according to job function, need-to-know and need-to-act bases.

Information Users

Individuals are responsible for understanding all data elements. If the meaning of a data element is not understood, the appropriate data custodian must be contacted. Users must exercise care in using the institution's electronic information systems, both the central institutional database and all departmental systems. Data files must be protected from unauthorized use, disclosure, alteration, or destruction.

Each user is responsible for security, privacy, and control of entrusted College own data. Each user is responsible for all transactions occurring during the use of one's login and password. College data is primarily stored on college servers.

All employees who require access to online records must use the user ID and password as requested by a functional area data custodian. This will enable electronic actions to be tracked to a specific user ID and therefore, a specific person.

Students and temporary employees who have access (whether to view or update) to data in systems in must be trained so that appropriate levels of security and confidentiality are maintained.

It is the responsibility of the department supervisor or manager to ensure that system access is canceled for employees, temporary employees, and students who no longer work in his/her area. This can be accomplished by prompt notification to the functional area data custodian, who will in turn promptly notify IS.

Human Resources will notify IS of all terminations to eliminate all access associated with a user ID. This does not eliminate the manager's or supervisor's responsibility to communicate terminations in a timely manner, but provides a back-up system to ensure closure.

Data Change Policies/General Person Ownership

Whenever a name or address changes, it is necessary to determine which other offices may have an interest in this information.

The following conventions govern which office makes ID, Person and Non-Person Name changes. An activity report of changes made to a General Person will be run and distributed regularly to the relevant offices by the Data Standards Manger and monitored by Data Custodian or their designated representative.

Table 2 summarizes the departments responsible for name and/or address changes.

| Person / Non-Person Type | Office Responsible for Data/Change |
|---|------------------------------------|
| An employee or past employee, faculty or staff, other than a student employee | Human Resources and Development |
| An enrolled or inactive student and not a regular employee | Registrar |
| A student admission applicant or admissions prospect; not a student or employee | Admissions / Financial Aid |
| A vendor, independent contractor, or miscellaneous receivable and not an employee and not a student | Purchasing / Accounts Payable |
| An alumna/us and not any of the above | Institutional Advancement |
| A Parent of a current student | Registrar |
| A Parent of a past Student | Institutional Advancement |

Table 2

Entry of a General Person / Non-Person Information

Follow these standards when entering General Person Information:

Before a user creates a new record for a person or organization, the user must conduct a Common Matching search. This means the program searches for an ID and/or name to ensure the person or organization has not already been created in the database. Additional Common Matching processes should be conducted using any secondary data available. Such data may include, but is not limited to, alternate IDs, date of birth, tax ID, and address information (mailing, email, and telephone numbers). All users must conduct a thorough search to prevent creating duplicate records.

Every effort must be made to ensure that you are not duplicating an existing record. It is very difficult to effectively align all subsequent transactions under the proper single record if multiple records are ever created. Careful searching will prevent the creation of multiples.

REMEMBER TO SEARCH FOR BOTH FULL AND COMMON VERSIONS OF NAMES.

The safest way to search on name is to include the wildcard at the front and at the end of the search. Minimum entry for a person must include the following:

- First Name
- Last Name
- Address (If an address is NOT known, do NOT make up an address. Do NOT create the record until you obtain the address information).

It is most beneficial to have some of the following components as well:

- telephone number
- gender
- birth date
- social security number

Individual departments may have additional requirements for minimum entry.

It is understood that at various points in the building of new records (new employees, potential donors, potential students), some of this data may not be available. If none of the information noted above is available, data entry personnel should verify whether it is appropriate to add the new entity.

Caution: **The pound sign (#) and percent sign (%) should not be used in any data field because they may cause Oracle database errors.**

Sorting Rules

Data in Banner and other systems used at Otis College sorts according to standard ORACLE sorting rules. Below are the most frequently used characters listed in descending sort order.

Character Description

blank (space)

' apostrophe (used in names such as O'Connell)

- hyphen

0-9 numbers

@ at

A-Z upper case letters

' reverse apostrophe

a-z lower case letters

II. Name Standards

Enter names in mixed case so that when a name is printed on correspondence, it looks contemporary and professional.

Person Names

Only one record and one identifier should exist for each person in Banner. It is important that users search the database thoroughly before adding a new entity to Banner or other Otis databases to ensure the entity does not already exist – Otis is utilizing the Common Matching method.

All names should be entered using the upper/lowercase letters, punctuation and spacing as indicated by the individual.

If no middle name or middle initial exists, leave the field blank.

Hyphens may be used to separate double last names as indicated. If there are two last names that are not hyphenated (as specified by the individual), the two names would also be placed in the last name field.

Differences in case, spacing and punctuation will affect sorting. Names beginning with a lowercase letter will appear at the end of an alpha sort list. Names with spaces will appear earlier in a sort list. (See Sorting Rules above). *This kind of problem may be solved by certain report writers.*

Note: **Commas (,), slashes (/) and the pound (#) sign are never used in the first, middle, or last name field.**
Do NOT use title, prefixes and suffixes in the first, middle, or last name field.

Note: *First and Middle name fields have a maximum length of 15 characters each.
Last name field has a maximum length of 30 characters.*

Formatting

Enter the first, middle, and last names exactly as the person has indicated. If given the full middle name, enter the full middle name. Do not change a full name to an initial. Always use normal mixed case letters for names. The objective is to print the name on mailings, correspondence, etc., just as our "customer" wants it to be printed.

Note: Enter the name as it appears on a Social Security card, court order, marriage license, driver's license, or passport. The College is using the "current name" field in Banner to store the legal or formal name as it appears on these documents.

Case

If the person has written all uppercase letters, enter the normal mixed case letters. If the person's name starts with a lowercase letter, enter the first letter in lowercase (e.g., duBois).

Initials

Do not use an initial for the first name unless the name appears as such on accepted name documentation. In those instances in which a single character or initial is designated as the first name and is followed by a middle name, enter the single character or initial in the first name field with no period and the middle name in the middle name field.

One Name Only

If a person only has one name (e.g., Madonna, Cher), enter the name in the last name field. Enter a period (.) in the first name field. Banner requires a first name to be entered. Entering a period satisfies the form requirement and enters a value that is not highly noticeable when printing or viewing.

Punctuation

Enter hyphens, apostrophes, and periods (e.g., St. John Rivers) only when they are part of the legal name. Never use the left single quote or grave accent (`). Do not enter punctuation where there is none. Do not enter spaces before or after hyphens in hyphenated names. In the following examples, any could be correct:

- O'Donnell, Odonnell
- Dell'Acqua, DellAcqua, Dellacqua
- Jones-Smith
- Al-Hassan, AlHassan, al-Hassan, alHassan, al Hassan
- St.Denis, St Denis, StDenis, St-Denis, SaintDenis, Saint-Denis, Saint Denis

Spaces

Spacing in names is based on the legal name. Maintain the spaces indicated by individuals (e.g., Van Canneyt, de la Cruz).

Long Names

If a name is longer than the field allows, leave off the excess characters at the end of the name. Do not try to abbreviate in any way.

Legal Name

The legal name field should only be populated when the separate first, middle, or last name field is too short to store the complete name. In these cases only, enter the complete name in this field in first-middle-last name format. Note that this field is not used by any system processes. The data in this field merely provides a place in the system to store the full name for someone whose name will not fit completely in the standard name fields.

When you perform a name change for an individual whose full name is stored in the Legal Name field, you must also update the Legal Name field. If the new name fits in the standard fields, remove the information in the Legal Name field.

Note: In Banner, the Legal Name field is a single, free-format field that is **not** automatically updated if the person officially changes his/her name. You cannot use the Legal Name field as the basis for database searches.

Multiple First, Middle, or Last Names

Enter the names as identified on a Social Security card, court order, marriage license, driver's license, or passport, when entering names of users with multiple first, middle, and/or last names. For example: When entering Shi Su Wei Liu, appropriate documentation must be used to determine the first (Shi), middle (Su Wei), and last (Liu) names. Multiple names may be entered into a single field. When no documentation which breaks down the name as 1st, Middle, Last is present, enter Gwei Hung Herb Tsai as Gwei (1st); Hung Herb (Middle) Tsai (last). The standard would be to put multiple names in middle name field.

Preferred Name

Offices may enter data in this field when an individual uses a preferred name which is different than his legal first name. For example, if Elizabeth Anne Smith goes by Liz, you may enter "Liz" in the preferred name field.

Prefix or Title

This field may be left blank, but it is preferred to use prefixes for records of individuals.

All information is to be entered using uppercase/lowercase letters. Use standard capitalization rules. Punctuation is to be used in prefixes. See chart for a list of many of the prefixes currently used in the database. Standard abbreviations are preferred, but full titles may sometimes be used in special circumstances (i.e., The Right Honorable John Smith).

Foreign language prefixes (i.e., Mademoiselle, Senor) are used only when sending to a foreign address.

Do not enter prefixes or titles in any of the name fields. Enter the standard abbreviation for the prefix or title in mixed case with no punctuation in the prefix field. It is Otis practice to use "Ms" as the prefix for single women or women with unknown marital status unless otherwise requested by the individual.

The Prefix default for the Otis is *Mr.* or *Ms.*

**Note: The preference is to use the abbreviated form of the prefix.
Do not enter prefixes in any other fields.
Commas (,), slashes (/) and the pound sign (#) are never used in this field.**

Note: This field has a maximum length of 20 characters.

Suffix

Do not enter suffixes in any of the name fields. Enter suffixes in mixed case with no punctuation in the suffix field. (see Appendix A – Prefix/Suffix/Title Abbreviations).

Enter both a prefix and suffix when the person has an inherited suffix (e.g., Mr John Doe Jr). Both a prefix and suffix can be used for individuals who are in the military, are retired military, or are in religious orders (e.g., Gen Frank Smith USA (Ret)).

Do not enter a suffix indicating an academic or medical degree if you have entered a prefix. As a general rule, individuals are addressed in a non-professional context. Therefore, the prefix and not the professional suffix will be used. For example, do not enter a prefix of Dr and a suffix of MD; rather, enter the prefix only (Dr James Smith, not Dr James Smith, MD.)

Do not enter academic degrees or professional designations as a suffix unless specifically asked by the individual.

**Note: Do not enter suffixes in any other fields.
Slashes and the pound sign (#) are never used in this field.**

Note: This field has a *maximum length of 20 characters*.

Alternate Names

Alternate names are other names that an individual would be known by (or has been known by). Alternate names may include: maiden names, married names, adopted names, etc. Alternate names may also be stored in the system to support certain system processes such as awarding degrees, production of transcripts, etc. Any name change must be supported by documentation such as a "Request for Name Change" form.

Table 3 defines offices that may process name changes for the specified populations. All the roles pertinent to the record must be identified. When roles impacting other offices are present, the required documentation must be collected and forwarded to the other offices along with notification that the change has been made.

| Population | Office to Perform Name Change |
|---|--|
| Alumni | Institutional Advancement |
| Donors (non-student, non-employee, non-vendor) | Institutional Advancement |
| Employees | Human Resources |
| Students | Registrar's Office |
| Vendors | Institutional Advancement Finance, Purchasing |
| Prospective Students | Admission |

Table 3

Before a name change or alternate name is entered in Banner, the previous name of the individual or vendor must be identified with a name type. Name types are validated against table GTVNTYP within Banner (as of May 12, 2012) as found in table 4.

| GTVNTYP_CODE | GTVNTYP_DESC |
|--------------|---------------------|
| MAID | Maiden |
| STUD | Student Name |
| STAF | Otis Staff |
| FMR | Former Name |
| BRTH | Birth Name |
| GRAD | Graduation Name |
| CSRT | Corporate Sort Name |
| SSN | Social Security ID |
| SPCE | Spouse Name (no ID) |
| JOIN | Joint Name |
| ADID | Alumni/Dev ID |

Table 4

Non-Person (Vendor) Names

Vendors can be companies, organizations, or entities doing business with the College in a professional capacity. They could include suppliers, granting agencies, banks, institutions, government entities, or individuals. Vendors and non-student, non-employee individuals will be entered into the non-person name information field through the FTMVEND form.

Only one record and one identifier should exist for each non-person/vendor. It is important that you search the database thoroughly before adding a new non-person to Banner or other Otis databases to ensure that the entity or individual does not already exist.

Always enter non-person names in the non-person name field as listed on an invoice or other company document. Spaces are permitted between multiple names.

Note: Periods are permissible in non-person names.

If an article (*e.g.*, a, an, or the) is used as an adjective within the full legal name on a non-person entry, include it when entering the name in Banner or other Otis databases. If a non-person name begins with the word "The" as appearing on the company's letterhead, invoice, or bidder application, include it when entering the name.

Examples:

- ABC Trucking
- Diamond Life Insurance
- Smith King & Jones Inc
- J F Kennedy Co
- First National Bank
- The Copy Store

Abbreviations

In general, you should not abbreviate company names. However, when a company is more widely known by its abbreviated name than its full name (*e.g.*, IBM, HP) or when space limitation requires the use of abbreviations, use only accepted Otis College abbreviations. The most common abbreviations used for vendor names can be found in Appendix B. A longer list of accepted general abbreviations is in Appendix C.

If an abbreviation is not available from these sources, refer to US Post Standards for abbreviation business words at: <http://pe.usps.gov/cpim/ftp/pubs/pub28/pub28.pdf>

Doing Business As...

If the non-person entity has a "doing business as..." (DBA) name that is separate from its legal name, enter the DBA name in the DBA field and **not** as any part of the address. For data entry purposes, the same formatting rules apply to the DBA name as to the legal name.

Add alternate names on the "Alternate ID" tab.

Case

Enter all information using mixed case and standard capitalization. Never use all uppercase or all lowercase letters, except for acronyms.

Punctuation

Do not add punctuation where there is none. Periods may be used when required as part of the company's name. Examples: R.J. Reynolds Co. or Amazon.com.

You may use apostrophes, but do not use spaces before or after the apostrophe unless the apostrophe comes at the end of a word. For example:

- John's Plumbing Supply
- Four Wives' Club

Do not use commas between names. You may use hyphens or slashes to separate names, but do not use spaces before or after the hyphen or slash.

Use the ampersand only when it is part of a formal name. Use "and" in all other cases.

Acronyms

If a company is recognized by its acronym, use the acronym when entering its record (e.g., IBM, SCT, ITT, AT&T). Do not use a space between the letters of an acronym.

Numerals as Part of a Name

If a numeral is part of the official corporate name, enter the numeral rather than spelling out the number (e.g., 21st Century Productions).

III. Address Standards

Proper entry and formatting of addresses is important not only in providing reliable contact information for each record, but in allowing the College to take advantage of automated and discounted mailing systems for major mailings. Any questions about formatting should be directed to the IS Programmer Analyst or the IA Director of Donor Database Management.

Each address in Banner is coded with an Address Type. See Appendix D for the list of Banner Address Types and how they should be used.

Address histories are to be kept in Banner. Old or outdated addresses are to be made inactive (with an ending date) and the new or current address is added as a new record.

Address Formatting

There are 3 lines of address of *30 characters each provided by Banner* -- the first line must always be entered. The data on the address lines should contain delivery data only - do not include city, state and zip data on the address lines for U.S. addresses. For foreign addresses, see separate guidelines.

US Addresses

When making decisions about what to enter on what line, remember that the U.S. Post Office delivery standards read the address data from the bottom up and that if necessary, the Banner Label Program will delete lines of the address from the top down if it is not able to fit the address data on five lines (examples are provided below).

One Address Line

If there is one line of address, enter it on Line 1:

| | |
|----------|---|
| 123 Main | Street This is the primary delivery data and should be entered on line 1. |
|----------|---|

Two Address Lines

If there are two lines of address the secondary data should be entered on Line 1 and the primary address data on Line 2:

| | |
|-----------------|-----------------------------------|
| 16 Willow Drive | This is secondary delivery data |
| RR 1 Box 68A | This is the primary delivery data |

Three Address Lines

If there are three lines of address, the tertiary data should be entered on Line 1, secondary data on Line 2 and the primary delivery data on Line 3:

| | |
|-----------------|------------------------------------|
| Willow Farms | This is the tertiary delivery data |
| 16 Willow Drive | This is secondary delivery data |
| RR 1 Box 68A | This is the primary delivery data |

Post Office Boxes

If you have a PO box and a street address, the PO Box should be considered the primary delivery data and entered on Line 3:

| | |
|-----------------|------------------------------------|
| Willow Farms | This is the tertiary delivery data |
| 16 Willow Drive | This is secondary delivery data |
| PO Box 1234 | This is the primary delivery data |

Apartments

If you have an apartment number it should be entered at the end of the street address on Line 1. If the address doesn't fit all on one line then the apartment number is entered above the street address on Line 1 with the street address entered as the primary delivery data on Line 2:

| | |
|------------------------------|---------------------------------|
| Apt. 135 | This is secondary delivery data |
| 1101 Alexander Hamilton Ave. | This is primary delivery data |

Business

When entering the business address for a person, the department should be entered on Line 1, the business or firm name on Line 2 and the delivery data on Line 3. If the delivery data requires more than two lines, the department data should be omitted.

| | |
|-----------------------------|-------------------------|
| Public Relations | Department |
| American Heart Association | Company/Firm Name |
| 1660 Duke Street Suite 1234 | Street and Office Suite |

or

| | |
|----------------------------|-------------------|
| American Heart Association | Company/Firm Name |
| Suite 1234 | Suite |
| 1660 NW Frontier Street | Street |

Business/Organization Address Lines

The guidelines for business/organization address--non-person records--should be followed for all corporations, organizations, foundations and vendors. The same general rules as described in the previous sections apply to these records.

City

The city name is always entered in the city field. The name is entered in uppercase/lowercase letters. *City name field has a maximum field length of 20 characters.* The general rule is that city names should be spelled out. A standard exception is when the city name includes St. for Saint and Ft. for Fort, then always use that format (see table 5).

| P/O City Name | Abbrv. | Example |
|----------------|--------|-----------------------|
| Air Force | AF | Eielson AF Base |
| Court | Ct | Washington Ct House |
| Estates | Est | Rolling Hills Est. |
| Fort | Ft. | Ft. Benj. Harrison |
| Ground | Grd | Aberdeen Proving Grd. |
| Heights | Hts | Shelter Island Hts |
| Island | Is | Channel Is. Harbor |
| National | Natl | Yellowstone Natl Park |
| Park | Pk | Research Triangle Pk |
| Peninsula | Pnsla | Palos Verdes Pnsla. |
| Saint | St | Marine on St. Croix |
| Springs | Spgs | White Sulphur Spgs. |
| Station | Sta | Natural Bridge Sta. |
| U.S. Air Force | USAF | USAF Academy |

Table 5

Directional indicators in a city name are never abbreviated. (Examples: North Boston, East Bend).

The only exception to these general rules is when the city name needs to be shortened to fit the field. In those cases refer the lists of excepted abbreviations found in the street address or the non-person field sections for guidelines. Punctuation may be left out in order to fit the field size.

Nation Code

The nation code field is used ONLY for international addresses. It is always left blank when a U.S. zip code is used. This includes military addresses and addresses in U.S. territories, such as Puerto Rico, Guam and the Virgin Islands.

State

The state field is used for U.S. and Canadian addresses only. Enter the two-letter standard abbreviation for U.S. states, U.S. territories or military destinations, or for Canadian provinces/territories. For a list of state and territory abbreviations see Appendix E. For Canadian provinces/territories see Appendix E.

Zip Code

Zip codes MUST be entered for all U.S. and Canadian addresses.

The zip code field is NOT to be used for any other international addresses.

Banner has a zip code validation program. When the five digit zip is entered, the program will automatically validate and enter the correct city and state names in those fields based on the information in the program. Once the program has validated and entered the information, the city and zip fields can be edited.

If the zip+4 information is available, enter it in the zip field. The hyphen must be used when entering the entire nine-digit ZIP code.

Street Address / Abbreviations

All information is to be entered using uppercase/lowercase letters. Never use all uppercase or lowercase letters. *Street address has a maximum field length of 30 characters.*

The preferred format is to spell out all address suffixes or street designators such as Road, Street, Avenue, etc. The only standard exception to this rule is Boulevard, which can always be abbreviated as Blvd.

Other designators can be abbreviated if necessary to fit the address on one line.

All acceptable address abbreviations can be found in Appendix G.

Secondary address identifiers or unit designators are generally spelled out if there's space. The most common unit designators are Building, Floor, Room, Suite, Unit and Apartment.

The only standard exception to the rule is Apartment, which should always be abbreviated Apt.

Other secondary identifiers are spelled out but can be abbreviated if necessary to fit address on one line. List of acceptable secondary unit designator abbreviations can be found in Appendix H.

The pound (#) sign is never used anywhere in the address. If an address is received with just a number at the end of the street, it can most often be assumed it's an apartment number. Use the abbreviation No. for number when necessary (i.e., Lodge No. 123)

Directional (South, East, West, Southwest) are always abbreviated (without periods or spaces) unless they are part of the actual street name (i.e., North Street, East River Road, West End Avenue).

Examples:

| | |
|-----------------------|--|
| 149 North Street | (not 149 N. Street) |
| 234 Jackson Street N | |
| 1222 SW Morris Street | |
| 15 N East River Road | (the street name is East River Road, runs N & S) |
| 876 N West End Avenue | |

An exception to the above rule is when the street name itself is E, W, N, or S or any single letter like I Street. This is common to many street addresses in Washington DC. In these cases, the compass direction preceding the street name should be spelled out.

Examples:

15 East E Street
789 North W Place
234 I Street SW
456 O Street NE

For addresses where the street name is a number, the number should be spelled out if it is a number from 1-10. For numbers 11 and above, the number itself should be used with the appropriate suffix (i.e., the "nd" in 42nd).

Examples:

123 Fifth Avenue
456 Tenth Street
11 42nd Street
56 12th Avenue

Hyphens and slashes may be used when needed for clarity or designated fractions.

The period is allowed.

The ampersand (&) should not be used instead of the word 'and' unless it is part of the legal company name.

“In Care Of” should be entered as 'c/o' in lower case. Do not use the percent sign (%) or spell out “in care of”.

The third line of the street address is usually used only for international addresses or business addresses that won't fit on two lines.

Use one line for a street address when possible. Use acceptable abbreviations to shorten the address so it will fit on one line.

Examples:

101 S Superior Street Apt. 3
185 Pine Haven Shrs. Rd. Apt. 110

Rather than two lines:

Apartment 3

101 S Superior Street

Apt. 110

185 Pine Haven Shores Road

Commas are generally not used in address lines.

Rural Route addresses are entered as RR__ Box __ with a space between each part.

Addresses received as RFD or RD should be entered as RR.

A Box number in an address should always be preceded by another postal indicator, most often RR or PO. If an address is received with just a Box number, assume it is a PO Box unless the address indicates that it is a school or college address. Then the Box number should go above or at the end of the school address.

Other types of Boxes include PMB (for a rented Personal Mail Box). Some schools may also use initials for student campus mail boxes. No punctuation is used in these acronyms.

IV. Date, Telephone, and E-Mail Standards

Date

All dates must be entered dd-mon-yyyy (hyphens are optional)

- Example: January 17, 2000 should be entered as 17-jan-2000 or 17jan2000.

[Note: Within Banner, there appears to be inconsistency in the behavior and intelligence of various date fields. Recommendation of standard is forced by the only date format that appears to behave correctly in all date-fields tested.]

Other

When a date is required but none is available, use the holder date of 01-Jan-1900. Records containing this date will be routinely identified and corrected.

Telephone

This section of the standards governs telephone types at Otis College.

Changes to Telephone Numbers

In order to maintain telephone history, the old telephone number and type should be inactivated and a new telephone number with type should be inserted so that the old one is retained.

Note: Never overwrite existing telephone information, unless correcting a typographical error.

Entry of Telephone Types

The telephone type describes the type of telephone number entered. A full list of Telephone/Fax Types found in Banner form STVTELE as of May 14, 2012 can be found in Table 6.

| STVTELE_CODE | STVTELE_DESC |
|--------------|--------------------------------|
| BFAX | Business Fax |
| BI | Billing |
| BP | Business/Work |
| BU | Business/Work |
| CAR | Car |
| CELL | Cell |
| CH | Corporate Headquarters |
| CO | Company |
| DP | Diploma contact |
| EM | Emergency |
| EN | Emergency Notif./I.S. Use Only |
| FAX | Fax |
| H1 | Home |
| H2 | Second home |
| MA | Mailing |
| PA | Parents/Spouse/Guardian |
| PAGE | Pager |
| PR | Permanent |
| TF | Toll Free |

Table 6

The following rules apply for the use of telephone types at Otis College:

- When entering phone number on address form, telephone type will automatically populate based on address type. Telephone type may be changed manually on this form if necessary.
- One telephone number (of either the same or differing telephone types) may be associated with more than one address type. But only one telephone type may be designated as primary and active on the telephone form. In addition, only one telephone number per telephone type may be active.
- Telephone records can exist that are not associated with any address; however, it should be noted that only telephone numbers that are associated with an address can be updated through the self-service web.

Area Code

The three-digit area code must be entered for all phone numbers.

Phone Number

Enter the seven-digit phone number without the hyphen between the third and fourth digits.

Example: 6656914.

Extension

If an extension number is provided, enter only the digits of the extension.

Do not enter EXT or X into the extension field. Example: 7300.

International

International phone numbers are NOT entered on the Banner address form. Enter international phone numbers on the PPATELE or SPATELE form in the 'International' field, leaving the regular area code, number and extension fields blank.

Do not include '011' as a prefix.

Include hyphens or spaces as needed if space permits.

E-Mail Address

The Otis College e-mail type is system-generated and cannot be changed except by IT.

A full list of E-mail Types found in Banner form GTVEMAL as of May 14, 2012 can be found in Table 7.

| GTVEMAL_CODE | GTVEMAL_DESC | GTVEMAL_DISP_WEB_IND | GTVEMAL_URL_IND |
|--------------|---|----------------------|-----------------|
| EXCH | Otis Assigned Staff and Faculty Address | N | N |
| WEB | Website | Y | Y |
| HOME | Home Address | Y | N |
| BUS | Business Address | Y | N |
| LDAP | Otis Assigned Student E-Mail Address | N | N |

Table 7

When making e-mail address changes, old e-mail address should be overwritten by a new address.

Only enter a valid e-mail address in this field (including the @ symbol). Do not enter a URL (e.g. <http://www.otis.edu>).

- Appendix A: Prefix / Suffix / Title Abbreviations
 - General Prefix/Title
 - General Suffix
 - Military Title
- Appendix B: Common Abbreviations for Vendors
- Appendix C: General Abbreviations
- Appendix D: Banner Address Types
- Appendix E: State Territory Abbreviations
- Appendix F: Canadian Provinces & Territories
 - Mexico States & Territories
 - Countries & Territories
- Appendix G: Address Abbreviations
- Appendix H: Secondary Unit Designators