**Core Data Standards Manual**

03/15/2010

**Name and Address Change Policy**

The University is committed to maintaining the most accurate addresses possible for all students, faculty, staff and other members of the University community. The responsibility for formulating, documenting and monitoring procedures that ensure the accuracy of address, telephone, email address, and contact information in the Colleague database is distributed among several offices at the University based on the type of constituent.

Responsibility for ensuring that procedures are established, that the procedures are disseminated to all users with access to change the affected data, that the procedures are followed accurately, and that appropriate quality control measures are put into place is assigned as shown below:

|  |  |  |
| --- | --- | --- |
| Constituency | Responsible Division | Hierarchy |
| Full- and Part-time Faculty and Staff (not including student employees, employed solely because they are students) | Human Resources | 1 |
| Current and Former Students (including student employees) | Registrar | 2 |
| Non-Matriculated Applicants | Admissions | 3 |
| Parents of Applicants | Admissions | 4 |
| External Business Contacts | Business Office | 5 |
| Alumni, Corporations, Foundations, Trustees\*, Donors, Parents of Enrolled Students, Former Parents | Development Office | 6 |

For changes in the Colleague database, if an address falls into more than one of the above-listed categories, the hierarchy number shown is used to determine who has the primary responsibility for the maintenance of the address. The divisions need to be responsible for periodic revisions, maintenance and intentional efforts to maintain the information up to date.

*\*Trustees and high-level donors will be protected through privacy coding that allows only Development Office staff to make changes, regardless of other categories into which the individual may fall.*

**Name Standards**

**General**

Names should be entered as indicated by the person – apostrophes, hyphens and spaces should be entered.

*For example, Sylvia Van Dyke should be entered as Sylvia Van Dyke, not Sylvia VanDyke or Sylvia Vandyke. Soukaina Al-Hussein should be entered as Soukaina Al-Hussein not Soukaina AlHussein or Soukaina Alhussein.*

The use of prefixes will be optional; if a student application lists a prefix then a prefix will be used. If a student does not indicate a prefix, but does indicate a sex, then the corresponding prefix will be entered: males as Mr. and females as Ms. This currently populates automatically in NAE.

When using a professional prefix (such as Dr.) in the preferred mailing name, joint mailing name or other mailing name, do NOT also use a suffix (such as M.D., Ph.D.).

*For example, enter Dr. David Jones in the prefix/first/last name fields and input preferred name and David Jones, Ph.D. Do not enter Dr. as prefix AND Ph.D. as suffix.*

**Prefixes**

The following table lists the most commonly-used prefixes. Other prefixes not available in the menu may be entered by typing “=” before the prefix if necessary.

|  |  |
| --- | --- |
| Mr. | Lt. Col. |
| Mrs. | Col. |
| Miss | Brig. General |
| Ms. | Maj. General |
| Dr. | Ensign |
| Father | Lt. Cmdr. |
| Sister | Cmdr. |
| Rev. | Rear Adm. |
| Brother | Admiral |
| Rabbi | Sgt. |
| Lt. | Congressman |
| Capt. | Senator |
| Maj. | Ambassador |
| General | Commodore |

**Suffixes**

The following table lists the most commonly-used suffixes. Other suffixes not available in the menu may be entered by typing “=” before the suffix if necessary.

|  |  |
| --- | --- |
| Jr. | C.P.A. |
| Sr. | Ret. |
| II | U.S.A.F. |
| III | U.S.M.C. |
| IV | R.S.H.M. |
| Esq. | J.D. |
| Ph.D. | U.S.N. |
| M.D. | U.S.A. |
| D.D.S. | R.N. |

**Address Standards**

**General**

USPS mail guidelines will be followed whenever possible, with the exception of capitalization. While USPS would like to have all letters capitalized, mixed case will be used (capitalize the first letter of a name or street and put the rest of the name in lower case).

**Street Addresses**

Street designations will be abbreviated without punctuation using the USPS abbreviations. Common names and abbreviations are listed below:

|  |  |
| --- | --- |
| *Name* | *Abbreviation* |
| Avenue | Ave |
| Bluff | Blf |
| Boulevard | Blvd |
| Circle | Cir |
| Court | Ct |
| Drive | Dr |
| Lane | Ln |
| Parkway | Pkwy |
| Road | Rd |
| Street | St |

 *Complete listing: http://www.usps.com/ncsc/lookups/abbreviations.html#suffix*

Other guidelines follow:

* Do not use a period for preceding and following singular directional indicators. For example, N Main St, not N. Main St.
* Do not use punctuation or spaces for Post Office boxes and for preceding and following multi-directional indicators. For example, PO Box 85 and NW Ocean Blvd.
* Spell out usually directional indicators such as West or South when it is used as a street name; for example, in the case of N West Blvd.
* Abbreviate US, Rural Route, Rural Delivery, and State Route without spaces or punctuation. For example, US Route, RR, RD, and SR.

**Secondary Unit Indicators (Apartments, Suites, etc.)**

Use the USPS abbreviations for apartment (Apt) and suite (Ste) to precede an apartment, room, space, lot or suite number/letter. Do not use the “#” as an abbreviation unless it is the only information provided. Common secondary unit indicators and abbreviations are listed below:

|  |  |
| --- | --- |
| *Name* | *Abbreviation* |
| Apartment | Apt |
| Basement | Bsmt |
| Building | Bldg |
| Department | Dept |
| Office | Ofc |
| Room | Rm |
| Suite | Ste |

 Complete listing: <http://www.usps.com/ncsc/lookups/abbreviations.html#secunitdesig>

If the apartment number will not fit on the same line as the delivery address, it should be placed on the line above, rather than the line below.

For example: Apt 563

 10110 Longstreetname Blvd

**Foreign Addresses**

There are too many countries to set standards for each country, as each country has its own mail requirements. There is a dropdown menu available in which many countries are listed and spelled out correctly. The most important address requirement is to completely spell out the country name, in all capital letters, on the last available line.

**Address Types**

The following address types will be used:

|  |  |
| --- | --- |
| AP | Accounts Payable |
| AR | Accts Receivable |
| B | Business |
| BOX | Campus Box Number |
| CK | Check Address |
| CO | Correction (used to delete) |
| H | Home Permanent |
| L | Local (Student Commuter) |
| SI | SEVIS International Address |
| SUS | SEVIS U.S. Address |
| WEB | Web Address |

**Address Change Sources**

The following address change sources will be used:

|  |  |
| --- | --- |
| CK | Check Received |
| COR | Correction |
| FR | Friend/Relative |
| G | General Survey |
| HD | Harris Directory |
| N | New Address Form |
| NCOA | Nat'l Change of Address |
| ON | [On-line Service](http://www.switchboard.com/) |
| OT | Other |
| PHON | Phonathon |
| R | Returned Mail |
| SELF | Self Notification |
| VEN | Vendor Application Form |

**Mail Codes**

The following mail codes will be used:

|  |  |
| --- | --- |
| BA | Bad Address |
| FO | Foreign |
| LO | Lost |
| NAD | No Alumni Directory |
| NC | No Communication |
| NEC | No Email Communication |
| NEN | No Email Newsletter |
| NES | No Email Solicitation |
| NP | No Phone |
| NPB | No Publications |
| NS | No Solicitation |

All returned mail addressed to prospects and applicants will be sent to the appropriate Admissions Office, which will update the address, if available, or else make the address Former and code BA.

All returned mail addressed to current students will be sent to the Registrar’s Office, which will update the address (if provided by the post office) or put an address hold on the record and add a mail code of BA.

All Development returned mail will continue to be processed by the Development Office, which will use the BA or LO code as appropriate.

All returned mail for faculty and staff will be sent to HR, who will then contact them to request a change of address form.

**Other Core Standards**

**Sources**

The Source codes that will be used are:

|  |  |  |  |
| --- | --- | --- | --- |
| AL | Alumnus | ORE | Organization--Employer |
| ALH | Alum of Marymount High School | ORF | Organization--Foundation |
| AP | Applicant | ORU | Organization--Univ./College |
| CER | Certificate Holder | ORV | Organization--Vendor |
| CON | Contact Person  | PAA | Parent of Alumni |
| EMA | Employee--Adjunct | PAC | Parent of Current Student |
| EMF | Employee--Faculty | PAF | Parent of Former Student |
| EMS | Employee-Staff | PAG | Parent--Grandparent |
| EMT | Employee--Temporary | POL | Political Contact |
| EMX | Employee--Ex-Employee | REL | Religious Community Member |
| EXS | Ex Spouse | SP | Spouse |
| FR | Friend | STC | Student, Current |
| MEM | Memorial Donor | STF | Student, Former |
| ORC | Organization--Corporation | STH | Student, Hiatus |
| AFF | Affiliated Organization - MU | TR | Trustee |

Undergraduate/Graduate Admissions is responsible for assigning a source code of AP (Applicant) to all applicant records. When the applicant becomes a student, a batch update process will change the AP source code to STC (Student, Current). This update will be run three times a year: during the fall and spring semesters and at the end of the summer sessions.

When the Registrar's Office has graduated the student, the STC source code will be changed to AL (Alumnus) through a batch process. When a student withdraws with the proper paperwork, the Registrar's Office will change the source code from STC to STF (Student, Former). When a student goes on hiatus, the Registrar’s Office will change the source code from STC to STH (Student, Hiatus)

The appropriate Admissions office will input parent information into the database. Because parents of applicants do not yet have an established relationship with the University, no source code will be assigned. When the applicant sources are updated to STC (see above) the parents will be assigned a source code of PAC (Parent of Current Student). Applicants who do not enroll will continue having a source code of AP and parents of non-enrolling applicants will continue to have no source code. If a current student reports a parent not previously reflected in the database, then that information will be sent to the Registrar's Office and they will update it. The student will also be asked to fill out the proper paperwork in order for the change to be made in their record. If an alumnus/alumna reports a change in his or her parent status, the Development Office will be responsible for making that change.

The Human Resources Office will assign the appropriate source code to the record of the person being hired (EMA, EMF, EMS, EMT). Additionally, Human Resources will change the appropriate source in the record of the person being terminated (i.e. from EMS to EMX).

The Development Office will maintain source codes for Trustees, Friends, etc.

**Person Origin Codes**

The primary users of person origin codes are Admissions, HR and Development. The Development Office will use the code of “DEV” for all person records created by Development. The Admissions and Human Resources Offices will continue to use their set of origin codes as established within these offices.

**Document Naming and Communications Management Standards**

Documents used for communications management will always be named using the office code at the beginning of the name. The remaining characters of the name are to be used at the office’s discretion. However, Datatel recommends the following naming convention:

*Office Code + Type + Year (2-digit) + Description*

Types include D – Document Codes, T – Tracks, C – Communication Codes, R – Request Definitions.

Available office codes are listed below:

|  |  |  |  |
| --- | --- | --- | --- |
| ADE | Academic Deans | IE | Intensive English |
| ADV | Academic Advisors | IR | Institutional Research |
| AM | Admissions Office | LB | Library |
| AR | Accts Recv/Cash Receipts | LP | London Program |
| BA | School of Business Adm | MU | Generic Marymount |
| BK | Book Store | RG | Registrar |
| CA | Colleague Advancement | RL | Residence Life |
| CS | Campus Safety | SD | Student Development Ltd |
| DV | Development | SE | Student Employment  |
| F | Financial Aid | SH | Student Health |
| FD | Financial Aid/Admissions | SS | Student Development |
| FI | Faculty Info/Academic Rcds | SV | SEVIS Personnel |
| GRA | Graduate Admissions | TE | Telecommunications |
| HI | Health Insurance | UGA | Undergraduate Admissions |
| HP | School of Health Prof | VS | VP Student Services |
| HR | Human Resources | WB | Web Advisor |

**Savedlist Naming**

Savedlists should always be named using the office code (see table above) at the beginning of the name. The rest of the name is at the office’s discretion. If a savedlist needs to be preserved long-term (longer than 60-90 days), it should be prefaced by an underscore (e.g. \_AM.09APPS)

**Informer Report Naming**

Informer reports should always be named using the office code (see table above) at the beginning of the name. The remainder of the name is at the office’s discretion.

**Organization Entry Standards**

**Creating New Organization Records**

Create only one record per organization whenever possible; do not create separate *records* for branch offices and corporate divisions unless they are being used as a vendor or a donor.

*For example, maintain one master record for IBM and use the branch addresses for IBM Global Services, IBM Capital, etc. rather than creating separate records for these divisions within the larger organization. Another example: maintain one master record for the Department of Defense and use the branch addresses for the office names, such as Office of the Secretary of Defense.*

When it is necessary to create a new record for a “related” organization, use Relationships to record the parent/child relationship.

*For example, IBM Foundation is a separate entity, but is a “child” of IBM.*

Use all resources available to locate an existing record before creating a new organization record (Google it!)

*For example, Sodexho changed name to Sodexo but is not a new organization.*

Use Other Names field whenever possible to record alternate names for lookup purposes.

*For example, when creating record for IBM, enter “International Business Machines” in Other Names.*

Do not create “bogus” organizations for self-employment, homemaker, volunteer, etc.

**Organization Naming Standards**

Use the standardized abbreviation “US” for military/government organizations.

For example, US Department of Education, US Congress, US Air Force

Use as much of the full organization name as possible, without abbreviations. However, abbreviation may be necessary due to the length of the name. If there is a common acronym or alternate name, enter this in the Other Names field.

*For example, the name “American Association of Collegiate Registrars and Admissions Officers” is too long to fit in the name field without abbreviation. Enter as completely as possible in the name field and also enter “AACRAO” (the common acronym) in the Other Names field.*

**Duplicate Records**

When a duplicate organization record is encountered, follow the duplicate coding standards established for person records so the duplicate records will not be used in the future. If your security access doesn't allow you to correct duplicates, please notify Colleague Advancement Support Specialist, at X: 6802 or email \_\_\_\_\_\_\_\_\_\_\_\_\_ with the ID #s of the duplicate records.