

## GUIDELINES FOR CREATING and MAINTAINING ACCURATE RECORDS

- **SEARCH FIRST:** Before you create a new record for a person or organization, please make sure that person or organization has not already been entered in the BANNER database. **Each user must conduct a thorough search to prevent entering a duplicate record.** Duplicate records create problems in multiple parts of the system and may take many hours of staff time to locate and remove.
- **NEVER USE:** In creating a record, **never use** the pound sign (#) or the percent sign (%). The pound sign can cause ORACLE database errors and the percent sign has a special use within the search functions of the system.
- **ABBREVIATIONS:** There are specific ways to abbreviate words that are shown in this document. When entering data using abbreviations, please use only these approved forms.
- **NEVER USE** punctuation, including periods in abbreviations, unless the punctuation itself is part of a legal name.
- **DATA CHANGES:** Please do not make any data changes **UNLESS** you have the appropriate responsibility and authority. When you do make changes, please follow the procedures established by the Data Custodian of the data you want to change.
- **REMEMBER:** Some data fields have specific data entry rules. See the specific section under General Person Information for those rules.

## SUGGESTED DUPLICATE RECORD SEARCH TECHNIQUES

There are a number of ways to make quick checks in Banner to help ensure a duplicate PIDM record will not be entered. Even with the best of intentions, there will be some duplication that will occur. The goal is to minimize the duplications. As additional processes and tips are learned they will be added to this section.

### HR Related Records.

1. GO to PPAIDEN Form and click the blue flashlight
2. Choose **Alternate ID Search** (GUIALT)
3. Do a **Person** search on this screen
  - Type last name – first 3 or 4 letters and % (wild card). Click on Execute Query.

### Other Tips:

If the **Last Name** is known, search with the first couple of letters of first name and % (wild card). If the **First Name** could be spelled multiple ways do a **Last Name** search and check the **Name List** against other known data such as birth date, middle name, SSN, etc.

- Check for a close or similar SSN with the same name. It could have been typed wrong or the person may have listed it wrong on a recruitment card.
- Check for different spellings of first and last name and possible nicknames.
- If the person gives their legal name, check both first and middle names separately to see if they are on the system (i.e. Elizabeth Mary Smith may be on the recruitment card as Mary Smith or Elizabeth Smith). She may be on the system with an 899 number as Mary or Elizabeth Smith. Check both name variations against birthdays, SSN, and other ID numbers.

## NAME STANDARDS

Enter all information using upper and lower case letters. Enter the legal last, first and middle name or middle initial (entered without a period) as supplied by the person. If no first name exists, leave the field blank. Any person with a single character first name should be entered **WITHOUT** a period. In those cases where a single character first name is designated as the first name and is followed by a middle name, place the single character in the first name field and the middle name in the middle name field. If no middle name exists, leave the field blank.

*(NOTE: Utah State University does not use the 'Legal Name' field. Put the legal name in the last name, first name fields. In Banner, the 'Legal Name' field is a single, free-format field that is NOT automatically updated if the person officially changes their name. The 'Legal Name' field cannot be used as the basis for database searches.)*

- You **MAY** use hyphens to separate double middle names.
- Spaces **ARE** permitted if the legal spelling and format of the name includes spaces.
- Do **NOT** enter titles, prefixes, or suffixes in this field.
- **NEVER** use the pound sign (#), the percent sign (%) or the semi-colon (;) because they cause ORACLE database errors. Other special characters are permitted, if they are a part of the person's legal name.
- Spaces **ARE** permitted if the legal spelling and format of the name includes spaces. Examples: Mary Ann, Bobby Joe, La Pine, St John, Van Husen, De La Rosa, Van der Linden, Copper Smith, Anderson Johnson.
- Do **NOT** enter titles, prefixes, and suffixes in the first name, last name and middle name field.

## OVER

- **Note:** If you enter a new person and you need to record a previous name, use the Alternate name form.

### Prefixes (Optional)

Prefixes are optional. Enter the prefix in its own field, not in the first, middle, or last name fields. If provided, enter the prefix using upper and lower case letters **without a period**.

### Preferred First Name

Enter the preferred first name (or **NICKNAME**) into the preferred first name field. For example, if Christopher Paul Smith goes by 'Paul', enter 'Paul' into the preferred name field. Enter all information using upper and lower case letters. Enter the spelling and format of the preferred first name as supplied to you by the person. If no preferred name is given, leave the field blank.

**E-MAIL ADDRESS STANDARDS:** Enter the e-mail address exactly as written or provided by the person, following their exact entry in terms of upper and lower case letters, punctuation and so on.

**DATE STANDARDS:** Enter dates in the format of mmddyyyy. Banner displays all dates as dd-mmm-yyyy.

Example: 01171993 becomes 17-JAN-1993.

**BIRTH DATE STANDARDS:** Enter the date of birth according to the **DATE STANDARDS**. If you do not have a birth date, leave it blank until the correct date is determined.

**CONFIDENTIAL INFORMATION INDICATOR STANDARDS:** For employees and students, leave the Confidential Indicator unchecked, unless the employee or student officially request confidentiality.

**MARITAL CODES STANDARDS:** Financial Aid and Human Resources use marital codes.

**RELIGION CODE STANDARDS:** The USU Admissions Office stores religion information for demographic and marketing purposes only. This information is not to be used for identifying individuals.

**Below are codes and descriptions that will be used at USU.**

<b>Code Description</b>	Father	Father (religious)	Msgr	Monsignor	
Adm	Admiral	1stLt	First Lieutenant	MRB	Most Reverend Bishop
Amb	Ambassador	Gen	General	Pres	President
Atty	Attorney	Gov	Governor	Prof	Professor (includes Assistant and Associate)
Ag	Attorney General	Excel	His Excellency	Prov	Provost
Bhp	Bishop	Hon	Honorable (Cabinet Officer, Commissioner, Congressman, Judge, Supreme Court, United Nations US Delegate and Major)	Rabbi	Rabbi (religious)
Bg	Brig Gen			Rep	Representative
Brig	Brigadier			Rev	Reverend (religious)
Brother	Brother (religious)			Sen	Senator
Capt	Captain	I Pres	Interim President	Sgt	Sergeant
Ch	Chairman	Lt	Lieutenant	Ms	Single or Married Woman
Col	Colonel	Lt	Col Lieutenant Colonel	Miss	Single Woman
Cmdr	Commander	Ltgov	Lt Governor	Sister	Sister (religious)
Comm	Commissioner	Maj	Major	Rtrev	The Right Reverend
Cpl	Corporal	MSgt	Major/Master Sergeant	Dean	University Dean (includes Assistant and Associate)
Dir	Director	Mrs	Married Woman	Vp	Vice President
Dr	Doctor (Medical or Educator)	Mayor	Mayor		
Elder	Elder (religious)	Mr	Mister		
Est	Estate				
<b>Suffixes Code Description</b>	Esq	Esquire	MD	Doctor of Medicine	
II	The Second	JD	Jurist Doctor	PhD	Doctorate
III	The Third	Jr	Junior	Ret	Retired from Armed Forces
IV	The Fourth	LLD	Doctor of Laws	RN	Registered Nurse
CPA	Certified Public Accountant	MBA	Master of Business Administration	Sr	Senior
DDS	Doctor of Dental Medicine				

**NAME AND ID CHANGE STANDARDS**

The Registrar and/or the Director of Human Resources are data custodians for changing a generated ID 'A' number.

Name or ID changes are not permitted without legal documentation (e.g., marriage certificate, court order, social security card, passport [mandatory for SEVIS tracked students], etc).

All Name and ID changes will be coordinated with other departments as corrections are made including the offices of: Admissions, International Student and Scholars, Human Resources, Registrar, Financial Aid, Housing and School of Graduate Studies.

All persons employed by Utah State University must change their Name through Human Resources.

University students must change their Name through the Registrar's office using the Change of Personal Information form.

Approval for a Name or ID change for a student who is also employed by the University will begin with Human Resources.

SEVIS tracked student's Name will be maintained as it is printed on their I-20 VISA and must be approved by the International Student and Scholar office.

Potential students will change their Name through the respective Admission office.

Student ID corrections must be turned into the Registrar's office using the Change of Personal Information form to begin corrective processing that will include assistance from the Network and Computing Services personnel.

**ALTERNATE ID/SSN-TIN NUMBER STANDARDS**

SSN will not be stored in the Alternate ID field.

## ADDRESS STANDARDS

In order to maintain accurate and consistent data, USU adheres to the USPS standards in the maintenance of addresses. You can enter multiple addresses for a person or vendor by using different address types.

Select the appropriate address type code from the validation table. When changing an address, update the **To** date field for the old address, and then insert a new address with the effective date in the **From** date field.

### a. Street Standards

Enter all information using upper and lower case letters, **without periods**.

**NEVER** use the pound sign (#) or the percent sign (%) because they cause ORACLE database errors.

You **MAY** use hyphens and slashes when needed for clarity or to designate fractions.

**DO NOT** leave blank lines between street lines.

Use the **AMPERSAND (&)**. **DO NOT** spell out the word 'and'.

Enter **IN CARE OF** as 'c/o'. **DO NOT** use the percent sign (%) or spell out 'in care of'.

### b. Unit Numbers Such As Apartment, Building, Suite, Unit, Etc.

**NEVER** use the pound sign (#) or the percent sign (%) because they cause ORACLE database errors. Use **'No'** instead of the pound sign (#). See appendices for appropriate abbreviations.

#### Abbreviations for Unit Numbers

#	No
Apartment	Apt
Building	Bldg
Number	No

Room	Rm
Space	Sp
Suite	Ste
Unit	Unit

### Street and Po Box

See Address Appendix for abbreviations for street designators.

Do **NOT** use punctuation in the address.

The address format allows three lines of street address information. Utah maintains both the street address and the PO Box in one address block. Enter them as in the following examples.

#### Entered As Mail Delivered To:

John F Smith 1379 NW Pine PO Box 2351 Portland OR 97203	John F Smith <b>PO Box 2351</b> <b>Portland OR 97203</b>
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John F Smith PO Box 2351 1379 NW Pine Portland OR 97203	John F Smith <b>1379 NW Pine</b> <b>Portland OR 97203</b>
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### International Addresses

Enter the international address as supplied to you by the person, such as in the following examples.

#### Abbreviations for Street Designators (Street Suffixes)

Cheng Li Bader H Al-Khalifia  
7-301 Houji c/o Aramco  
Middle of JiangNan Road Dhahram 31311  
Guang Zhou 510240 Saudi Arabia  
GuangZhou  
China P R C

### 6. CITY STANDARDS

Enter all information using upper and lower case letters. Do **NOT** abbreviate unless limited by space. **NEVER** use the pound sign (#) or the percent sign (%) because they cause ORACLE database errors.

**8. ZIP CODE STANDARDS.** You **MUST** enter postal codes for all U.S. and Canadian addresses. Enter the 5-digit zip code. When the 9-digit zip code is available, place a hyphen between the first 5 and the last 4 digits, as shown in the example: 97203, 97203-5798

b. Canadian

Enter the six-character postal code with spaces, as shown in the examples below.

Utah uses U.S. Postal Service abbreviations for street and unit designations whenever possible. If the abbreviation you need is not included in this chart, see the USPS web page at [www.usps.com](http://www.usps.com).

Alley ..... Aly  
 Annex..... Anx  
 Arcade .....Arc  
 Avenue.....Ave  
 Bayou.....Byu  
 Beach.....Bch  
 Bend .....Bnd  
 Bluff.....Blf  
 Bottom.....Btm  
 Boulevard..... Blvd  
 Branch..... Br  
 Bridge..... Brg  
 Brook.....Brk  
 Burg .....Bg  
 Bypass .....Byp  
 Camp .....Cp  
 Canyon .....Cyn  
 Cape .....Cpe  
 Causeway..... Cswy  
 Center .....CtR  
 Circle.....Cir  
 Cliffs.....Clfs  
 Club .....Clb  
 Corner..... Cor  
 Corners .....Cors  
 Course .....Crse  
 Court .....Ct

Courts .....Cts  
 Cove .....Cv  
 Creek .....Crk  
 Crescent .....Cres  
 Crossing..... Xing  
 Dale .....Dl  
 Dam.....Dm  
 Divide.....Dv  
 Drive .....Dr  
 Estates..... Est  
 Expressway ..... Expy  
 Extension ..... Ext  
 Fall ..... Fall  
 Falls ..... Fls  
 Ferry ..... Fry  
 Field .....Fld  
 Fields .....Flds  
 Flats .....Flt  
 Ford .....Frđ  
 Forest..... Frst  
 Forge .....Frg  
 Fork..... Frk  
 Forks..... Frks  
 Fort ..... Ft  
 Freeway .....Fwy  
 Gardens.....Gdns  
 Gateway.....Gtwy

Glen .....Gln  
 Green..... Grn  
 Grove ..... Grv  
 Harbor..... Hbr  
 Haven .....Hvn  
 Heights.....Hts  
 Highway ..... Hwy  
 Hill.....Hl  
 Hills .....Hls  
 Hollow ..... Holw  
 Inlet ..... Inlt  
 Island ..... Is  
 Islands .....Iss  
 Isle .....Isle  
 Junction .....Jct  
 Key..... Ky  
 Knolls ..... Knls  
 Lake ..... Lk  
 Lakes ..... Lks  
 Landing ..... Lndg  
 Lane .....Ln  
 Light .....Lgt  
 Loaf ..... Lf  
 Locks.....Lcks  
 Lodge .....Ldg  
 Loop .....Loop  
 Mall ..... Mall

Manor.....Mnr  
 Meadows.....Mdws  
 Mill..... MI  
 Mills..... Mls  
 Mission..... Msn  
 Mount ..... Mt  
 Mountain ..... Mtn  
 Neck.....Nck  
 Orchard ..... Orch  
 Oval.....Oval  
 Park.....Park  
 Parkway ..... Pkwy  
 Pass .....Pass  
 Path.....Path  
 Pike ..... Pike  
 Pines .....Pnes  
 Place .....Pl  
 Plain .....Pln  
 Plains ..... Plns  
 Plaza ..... Plz  
 Point.....Pt  
 Port ..... Prt  
 Prairie..... Pr  
 Radial.....Radl  
 Ranch.....Rnch  
 Rapids.....Rpds  
 Rest.....Rst

Ridge..... Rđg  
 River..... Riv  
 Road ..... Rd  
 Row.....Row  
 Run ..... Run  
 Shoal..... Shl  
 Shoals ..... Shls  
 Shore ..... Shr  
 Shores.....Shrs  
 Spring.....Spg  
 Springs .....Spgs  
 Spur ..... Spur  
 Square .....Sq  
 Station.....Sta  
 Stravenue..... Stra  
 Stream ..... Strm  
 Street .....St  
 Summit.....Smt  
 Terrace .....Ter  
 Trace..... Trce  
 Track ..... Trak  
 Trail..... Trl  
 Trailer.....Trlr  
 Tunnel..... Tunl  
 Turnpike..... Tpk  
 Union .....Un  
 Valley ..... Vly

Viaduct .....Via  
 View .....Vw  
 Village .....Vlg  
 Ville .....Vl  
 Vista .....Vis  
 Walk .....Walk  
 Way.....Way  
 Wells .....Wls

**Abbreviations for Unit Numbers**

Apartment .....Apt  
 Basement.....Bmt  
 Building ..... Bldg  
 Number.....No  
 Room .....Rm  
 Space.....Sp  
 Suite.....Ste  
 Unit .....Unit  
 Upstairs.....Upst

**Direction Abbreviations**

East.....E  
 West.....W  
 North ..... N  
 South.....S  
 Northeast .....NE  
 Northwest.....NW  
 Southeast.....SE  
 Southwest .....SW

### **A Note about Address Types**

**NOTE:** An address is active when the inactive indicator is blank AND the To-Date field is blank or has a date in the future. An address is inactive when the inactive indicator is checked OR the To-Date field has a date prior to the current date.

The most common reasons to have an inactive address are:

- To store past address information when a person changes addresses (including prior business addresses),
- To indicate the active and inactive periods for temporary addresses.

For example, John Doe might have the following:

- A Permanent address
- An inactive Permanent address (A previous mailing address, stored for historic purposes)
- An address from a FAFSA application
- An optional Mailing address
- A Billing address, used only for statements.

Address information is updated in SPAIDEN or PPAIDEN, and displayed in a layered display (one address at a time). Banner displays addresses in alphabetical order by Address Type Code.

The chart below describes the address types that Utah uses and identifies who may update each type. Many individuals will only have a PR address. This is the default address type for the college.

### **DECEASED PERSONS STANDARDS**

Only the Registrar and/or the Director of Human Resources are authorized to enter information in these fields. A 'Y' indicates that the person is deceased. If USURF verifies the date of death, it is entered in the date field. A blank date indicates that USU was not able to verify the date of death.

The Office of Human Resources requires a death certificate for all deceased employees who were currently employed at USU at time of death. The USURF HR Manager requires a death certificate for all deceased employees who were currently employed at USURF at time of death. The Registrar's Office requires a death certificate or an obituary as proof that a student has deceased. The approved proof-of-death notice will be forwarded to the Executive Director of Human Resources for marking the deceased general person field of the student with a 'Y' and entering the date of death. For a student, the date-of-death will be determined first as noted on the death certificate or second as noted in an obituary or third by the date of receipt of the official notice if not date is provided, to comply with federal reporting requirements of Utah State University. Additional student record changes would be made by the Registrar's Office to note the student's death that include un-registering the deceased student from enrolled courses, marking and closing matriculation(s) and creating electronic data-imaging files, following deceased student procedures established by the Registrar's Office.

### **DECEASED INFORMATION CHECKLIST**

1. Check GUASYST to see what other areas have transactions posted.
2. If the person is connected to STUDENT, HUMAN RESOURCES, FINANCE, FINANCIAL AID OR ACCOUNTS RECEIVABLE, you will need to contact them to obtain permission to mark them as deceased.
3. **NOTE:** [www.ancestry.com](http://www.ancestry.com) can be used to verify the date of death by checking the SSN Deceased Database.