Shared Data Standards
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DATA STANDARDS
PRINCIPLES

1.01: OVERVIEW
The purpose of these standards is to ensure database integrity and provide easy, professional and cost-effective data management for the College of St. Catherine.

Some of the primary goals for creating these guidelines are to:

- Document a single institutional data entry standard that facilitates searches and provides accurate and consistent reports
- Avoid creation of duplicate records for any single entity
- Provide complete and accurate name/address information that meets Postal Services’ recommended mailing address setups and procedures
- Allow data entry in a timely manner with audit trails to monitor data integrity
- Maintain the highest standards for the College of St. Catherine data
- Share effective processing discoveries and problem-resolution tasks with other team members
- Take advantage of interpersonal networking, database capabilities and workflow analysis outlines
- Provide for a structure to ensure accountability and oversight to our information technology resources
- Provide a methodology by which validation tables can be updated

These standards establish measures for the protection, access, and use of any data system used by the College of St. Catherine. They also define the responsibilities of those that access and manage the data and equipment. Offices may have individual standards that supplement, but do not supplant or contradict this statement. Data entrusted to the College by other organizations (e.g., foundations and government agencies) is governed by terms and conditions agreed upon with those organizations. Specific issues not governed by such agreed terms shall be governed by the guidelines set forth in this document.

1.02: COLLEGE DATABASES
Although it is discouraged, it may occasionally be necessary for an office to create a database to store information that does not have a place in either Banner or Matrix. If that database includes any General Person data such as ID, name or address information, the office should include the Banner ID in their database as the link to obtain current name and address information from Banner or Matrix. The Data Standards in this document should be followed in any shadow database.
To ensure that the College has accurate information, each office must report name and address changes to the office responsible for maintaining name and address changes as described in the General Person Change Policy and Flow Diagram.

1.03: DEFINITION OF TERMS

1.03a: Academic Data
Information that is owned and used by the academic community. Examples of Academic Data would include: courses, credit loads, grades, etc. Please see the Academic Affairs Glossary of Terms for definitions of different types of Academic Data.

1.03b: Banner
Banner is the name of the integrated software purchased from Sungard Higher Education. Banner has Student, Financial Aid, Human Resources, Alumnae/Development and Finance modules. Banner also has a General module that ties the other modules together so that data common to the modules, such as name and address, are not duplicated. A person's College ID is the ID that is generated when the person is added to Banner. To help maintain data integrity between Matrix and Banner, the Banner ID is stored in Matrix when the person is in both systems.

1.03c: College Data
Information owned by the College of St. Catherine that is organized for analysis, used in reasoning, or used for decision making. Such information includes: employee and student personal information, financial information, class schedules and enrollment, donors, alumna/us, etc.

1.03d: College ID
A person's College ID is the ID that is generated when the person is added to Banner. To help maintain data integrity between Matrix and Banner, the Banner ID is stored in Matrix when the person is in both systems.

1.03e: Data Validation
Data validation corroborates the information provided by the source; that is, it makes sure that the information that has been provided is accurate, true, and reflects what actually is. It addresses the questions, “Is the source information correct?” This question can best be answered by using Validation Software.

1.03f: Data Verification
Data verification ensures that the information in a computer system database matches the information provided by the source. It addresses the questions, “Does the database match the source information?” This question can best be answered by using Common Matching functionalities.

1.03g: General Person
A General Person is a person (student, alumna/us, parent, employee, etc.) or non-person (vendor, trust, etc.) entity that is shared among the different Banner modules and databases. Some of the information considered to be General Person includes: College ID, name, address, telephone number, e-mail address, gender, birth date, marital status, deceased flag, and confidential flag.
1.03h: Matrix
Matrix stores Admissions data. Information Technology maintains an interface between Matrix and Banner so that Admissions information is available in Banner.

1.03i: Policy
A general statement identifying what is occurring. A policy generally includes a statement identifying the purpose of the policy and the policy statement itself.

1.03j: Private Information
Includes, but is not limited to: social security number, date of birth, religion, marital status, home phone number and address, student grades, passwords, donor name and donation, gender, ethnicity, citizenship, citizen visa code, veteran and disability status. CSC considers this private information and CSC employees are reminded to abide by the set policies.

1.03k: Procedure
A statement, which describes how to execute the plan for a given policy.

1.03l: Relational Database
A collection of data tables that are linked together by means of some internal identification number and therefore data redundancy is limited. For example, one table might have a student ID number and the course numbers that they are enrolled in. A separate table has the course numbers and the course descriptions. The course numbers would link the two tables together providing a course description for the courses a student is enrolled in.

1.03m: Shadow Database
A database/spreadsheet is considered to be a 'shadow' database, if it stores data that is also stored in the main ERP Database system.

1.04: GUIDELINES
This guideline statement establishes measures for the protection, access, and use of the College of St. Catherine administrative, information, electronic information and equipment.

Under no circumstances shall anyone use institutional electronic data for personal or professional uses (in detail or summary) such as in publications, seminars, or professional presentations, or otherwise release data, in any form, outside the College without prior approval from the appropriate Data Steward or the appropriate executive officer. Access to or use of data is not approved for use outside an individual’s official College Responsibility.

By law, certain electronic institutional data is confidential and may not be released without proper authorization. Employees should adhere to all applicable federal and state laws, and College policies concerning storage, retention, use, release, and destruction of data. Examples of federal and state laws include, but are not limited to Family Education Rights and Privacy Act (FERPA), Equal Employment Opportunity Regulations (EEO), Health Insurance Portability and Accountability Act (HIPAA), etc.

Electronic institutional data shall be used only for the legitimate business of the College of St. Catherine. Administrative computing services and facilities shall be used only as required in the performance of job functions.
All levels of management shall ensure that, for their areas of accountability, each information system user knows his/her responsibilities. Each system user shall read and understand this statement before accessing the system.

Supervising administrators shall ensure a secure office environment with regard to all institutional information systems. Administrators shall validate the access requirements of their staff according to job functions, before submitting requests for the provision of access.

Data should never be left on any system to which access is not controlled. Users are encouraged to log out of any system or lock their computer if they will be away from their workstation for an extended period of time. All users must log out at the end of the day.

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 with 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.

See the College of St. Catherine McGlynn Computing and Technology Center Use Policy. (This policy can be found at [http://minerva.stkate.edu/leguide.nsf](http://minerva.stkate.edu/leguide.nsf) under the Student Policies section)

See the College of St. Catherine Employee Handbook regarding the Information Technology use and Monitoring – Internet Use Policy and Confidentiality policies (The handbook can be found at [http://minerva.stkate.edu/hr.nsf](http://minerva.stkate.edu/hr.nsf) under the Policies & Procedures section)

See the College of St. Catherine Directory regarding the policy on Directory information.

1.05: DATA OWNERSHIP

College Data are a College resource and are owned by the Institution. Although individual offices, departments, programs, or schools may have responsibilities for portions of the College Data, the College itself retains ownership of and responsibility for the data. The College shall appoint Data Stewards to manage specific elements of College Data. A group of the College's appointed Data Stewards will comprise the Data Oversight Committee which is responsible for implementing this policy, as set forth below. Please see section 1.08: Responsibilities of this document for more information about Data Stewards and the Data Oversight Committee.

1.06: TYPES OF DATA

The categories of College Data are differentiated principally by two factors:

1. Who is permitted access, and
2. By restrictions on handling, disclosure or use of the data.

College Data will fit into one of the three following categories: public, internal/confidential, or restricted data.

1.06a: Public Data

Information or data that may be freely accessed or disseminated at the discretion of the relevant College official. Examples include: public relations news releases, departmental
directory information (not restricted from public disclosure), general web sites, and academic publications.

1.06b: Internal / Confidential Data
Information or data created or maintained by the College that, due to their nature, require more control with respect to access or disclosure. College personnel with a legitimate need-to-know may access data, based on their role within the College, or as authorized by the relevant College official. Data will normally not be disclosed outside the College or to those without a need-to-know. Disclosure of information outside the College will take place only with the advance authorization of the relevant College official, in consultation with College Counsel and other relevant departments within the College as necessary.

1.06c: Restricted Data
Information or data requiring strict control and very limited access and disclosure may be accessed by College personnel with a legitimate need-to-know, based on their roles within the College, and as authorized by the relevant College official. Disclosure of restricted information or data outside the College or to those not authorized by the relevant College official will normally not be allowed; however, any disclosure of restricted information or data will be made only with the authorization of the relevant College official and approval by at least one Officer of the College, in consultation with the College Counsel.

1.07: TYPES OF ACCESS

There are two main types of access available: query only or maintenance access.

1.07a: Query-Only Access
This type of access enables the user to view, analyze, and download, but not change, institutional data. Once information is downloaded, however, data can, but should not, be altered in word processing documents or spreadsheets. Downloaded information should be used and represented responsibly.

1.07b: Maintenance Access
Maintenance access provides both inquiry and update capability. Maintenance is defined as add, delete and change. This capability is generally limited to the offices directly responsible for the collection and management of the data. This access is available to administrators and users who have an authorized need to change institutional data in the routine performance of their job duties.

1.07c: Determining Access
Each user of administrative information is assigned appropriate combinations of query-only and maintenance access to specific parts of the administrative information system. The types of access are determined by the System Managers (see section 1.08a: Responsibilities for more information).

The College of St. Catherine provides employees with the information they need to do their jobs. As an employee with need-to-know access to our information systems (including all administrative systems, “shadow” databases, information stored on personal computers, in personal storage space, and information contained in shared tables, folders and directories) you will have privileges consistent with your job duties to access Private Information about faculty, staff, students, alumnae and donors.
1.08: RESPONSIBILITIES

The responsibility for maintenance and compliance with the Data Standards are determined based on relationship with the data, not on a hierarchy of organizational structure. These responsibilities are appointed by the department heads in relationship to their role within the organization. A single employee may be responsible for more than one of the roles listed below. These duties will be assigned as follows.

1.08a: System Managers
Responsible for working collaboratively with other members of the CSC community to oversee, evaluate, determine and implement changes to the College’s administrative systems.

System Managers are responsible for:
- Sharing effective processing discoveries and problem-resolution tasks with other team members
- Maintaining and controlling the validation and rules tables
- Evaluating data access requests on a “need to know” basis
- Approving staff requests for information access
- Maintain security requirements for module
- Ensuring appropriate training in accessing, using and interpreting information
- Ensuring that all legal and regulatory requirements are met
- Conducting audits of the data to ensure accuracy, compliance, and system maintenance

1.08b: Data Stewards
The Data Stewards are responsible for the day-to-day workings of the College’s administrative systems for their department’s area of responsibility.

Data stewards are responsible for:
- Maintaining institutional data within their areas of responsibility in accordance with federal and state laws and regulations (examples: FERPA and HIPPA) and college policies and procedures concerning storage, retention, use, release, and destruction of data
- Maintaining the accuracy, timeliness and completeness of data
- Ensuring appropriate training in accessing, using and interpreting information
- Ensuring that all legal and regulatory requirements are met
- Update and maintain Procedure Manual pertaining to their department’s area of responsibility
- Conducting audits of the data to ensure accuracy, compliance, and system maintenance

1.08c: Supervisors
Within the context of access to data, Division/Department Chairs and Directors are responsible for:
- Approving and forwarding staff data requests to the appropriate data steward(s);
- Ensuring a secure office environment with regard to all college data;
- Ensuring that passwords are not shared among staff.
• Providing staff with information of applicable laws and regulations regarding their areas of responsibility
• Providing users with procedure manual(s) for completing their work and to ensure proper training is provided for the employee to complete tasks

1.08d: Information Users
Each user is responsible for all transactions occurring during the use of his/her login and password. It is each user's responsibility to be aware of and abide by all applicable laws and policies as well as the following:

• Users must be aware of federal regulations (FERPA, etc.) and College policies applicable to data under the jurisdiction of their offices.
• Disclosure of information is restricted to stewards or their representatives. Contact a steward or direct representative (i.e., the Registrar or a representative of the Registrar for student information, for example) for approval prior to disclosure of information.
• All data associated with individuals (students, employees, alumnae/i, etc.) is private and shall be used only for the legitimate business of the College.

Individuals are responsible for understanding all data elements that are used. If a person does not understand the meaning of a data element, he/she should consult the appropriate system manager/data steward. Users should exercise due care in using the institution's electronic information systems, both the central institutional database and all departmental systems, to protect data files from unauthorized use, disclosure, alteration, or destruction. Each person is responsible for security, privacy, and control of his/her own data.

1.08e: Data Oversight Committee

The Data Oversight Committee is responsible for the overall and ongoing integrity and accountability of the system and the data standards, policies, and procedures surrounding the system. They are responsible for:

• Approving new, updated, or edited codes for the general person tables
• Editing the Data Standards document
• Managing any responsibility and accountability issues between departments
• Enforcing and investigating violations of the policy and procedure
• Communicating major changes and procedures which affect the College Community
• Annual Reports to Cabinet and annual auditing of system

The Committee will meet once per quarter. If a situation develops that needs immediate response, the Committee may be called to additional emergency meetings. The Committee will be made up of the following members:

• Chair: Director of Information Technology
1.09: PROCEDURE MANUALS

Procedure Manuals will be kept by the Data Stewards for their area of responsibility (i.e. Admissions, Registrar, Alumnae, Development, Human Resources, Payroll, Accounts Payable, Purchasing, etc.) In addition to the departmental procedures manuals, there will be a General Procedures Manual. The General Procedures manual is located in Appendix 3.03 of this document and shall be distributed to users along with the appropriate departmental manuals for them to complete their tasks by the Data Stewards. These manuals should contain information on the following, but is not limited to:

- Day to day task procedures
- Security Access
- Updating of tables and forms
- Reporting requirements
- Set-up instructions

Generally, these manuals will include step-by-step instructions on how to complete the required tasks for the department to be successful. The manual should also include screen prints of the appropriate screens and be updated as needed to have the most recent and accurate information required.

1.10: TRAINING

Training philosophy?

Levels of Training: Basic, Department User, Power User

Training is the responsibility of the Supervisor and/or Data Steward for each individual user for specific day-to-day activities. General overview training will be administered as a 1-hour tutorial by the Information Technology department.

1.11: SECURITY & ACCOUNTABILITY

Information Technology shall insure that a variety of security measures are in place. It shall maintain the central institutional database and insure data security, integrity, and availability to all who have been granted access to it per the employee’s assigned role at the College.

Appropriate procedures shall be followed in reporting any breach of security or compromise of safeguards. Any person engaging in unauthorized use, disclosure, alteration, or destruction of College data in violation of these standards shall be subject to appropriate disciplinary action, including dismissal or prosecution under applicable state and/or federal laws.
Within reason, it is expected that Supervisors, Data Stewards, and System Managers will conduct audits of the system to look for any violations or data problems that do not abide by the guidelines and policies listed in this document. They will be responsible for taking corrective action to ensure the integrity of the system.

Within the limit of the approved job description, the Data Oversight Committee shall oversee the implementation of these standards, review requests for exceptions to the policy, and manage disputes concerning use and stewardship of centralized electronic institutional data and institution-wide information systems.
2.01: OVERVIEW
The standards contained in this chapter primarily govern three characteristics of specific data items:

(1) the definition of the data item;
(2) the format in which the data item is to be entered; and
(3) the department/area responsible for updating, maintaining, and ensuring adherence to the data standards, which follow.

In addition, the policy may outline specific output formats for various types of data (e.g. address labels). Parameters other than format may be specified in the policy, for example, the exclusion of deceased persons from address labels, the priority order of address types, etc.

2.02: GENERAL PERSON

2.02a: General Person Ownership
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 IT and monitored by Data Stewards.

<table>
<thead>
<tr>
<th>If the person is…</th>
<th>Then…</th>
</tr>
</thead>
<tbody>
<tr>
<td>An employee or past employee, faculty or staff, other than a student employee</td>
<td>Human Resources make the change.</td>
</tr>
<tr>
<td>An enrolled or inactive student and not a regular employee</td>
<td>The Registrar’s office makes the change.</td>
</tr>
<tr>
<td>A student admission applicant * or admissions prospect; not a student or employee</td>
<td>Admissions office of appropriate program makes the change.</td>
</tr>
<tr>
<td>A vendor, independent contractor, or miscellaneous receivable and not an employee and not a student</td>
<td>Business Office and/or Purchasing make the change.</td>
</tr>
<tr>
<td>An alumna/us and not any of the above</td>
<td>Alumnae Association makes the change.</td>
</tr>
<tr>
<td>A donor, prospective donor, or parent; and not any of the above</td>
<td>Development makes the change.</td>
</tr>
</tbody>
</table>

* An applicant becomes a student after the 10th day of classes each semester and control shifts from Admission to the Registrar’s office.
Start

Faculty, staff, or past employee? Yes → Human Resources makes the change.

No →

Enrolled student or an inactive student? (including student-worker) Yes → Registrar's office makes the change.

No →

Student admission applicant or prospect? Yes → Admissions Office of appropriate program makes the change.

No →

Vendor, independent contractor, or misc. receivable? Yes → Business office/Purchasing makes the change.

No →

Alumna/us? Yes → Alumnae Association makes the change.

No →

Donor, parent, or a prospective donor? Yes → Development makes the change.

No → See Data Standards Committee
2.02b: Entry of General Person and/or Vendor 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, 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. Common Matching functionality

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.
2.02c: Social Security Number
Social security number should be entered if available but is required for students, employees, independent contractors, student workers and vendors. International students will need a SSN if they are eligible to work on campus.

Enter the nine-digit number. If complete information is unavailable, leave blank. Do NOT enter 000000000 or 999999999 or any other type of “holder” number.

2.02d: Date of Birth
The date of birth should be entered if available.

2.02e: Driver’s License
Driver’s license information will be maintained only if required for a specific position.

2.02f: Deceased Indicator
Refer to the change flow hierarchy regarding who can mark a record deceased. Determine which system the record is in. Follow your area’s procedures to make sure that all processes associated with this person are completed before the person is marked deceased. Check the “deceased” box and enter the date of death.

2.02g: Confidential Information Indicator
Refer to the change flow hierarchy regarding who can mark a record confidential. This field denotes that no directory information can be published or provided about the person (in addition to the usual confidentiality of academic records granted by FERPA).

2.02h: Identification Number Standards
The identification number (CSC ID) is a unique number given to each person or non-person entity that is affiliated with the College. In the production instance of the database, this will be a system-generated number.

In keeping with the spirit of FERPA and the current trends in privacy cases and legislation, this identification number is not the person’s social security number/tax ID. The identification number assigned will be carried across to auxiliary databases and used as the constituent’s identification number on those systems as well.
2.03: PERSON NAME STANDARDS

Names and addresses in Banner should have a customer friendly appearance. The objective is to enter names with both upper and lowercase letters so that when a name is printed on correspondence, it looks contemporary and professional.

Please see Appendix 3.02 for a full list of Name Types.

All name information is typed in mixed (upper/lower) case format.

Accents will not be used; apostrophes shall not be used in place of an accent.

The pound sign (#), percent sign (%), underscore (_), and asterisk (*) should NOT be used as they may cause Oracle database errors.

2.03a: Person Name

The ultimate goal is to enter the full legal name.

Enter the last, first and middle names using the individual's legal name. If given the full middle name, enter the full middle name. Do not change a full name to an initial.

For current students and employees of the college, legal name changes must be supported by documentation (i.e. marriage license, Driver’s license or state ID, divorce decree, SSN card, passport).

Derivative or “preferred names” needed in specific offices should use preferred first name or alternate name type codes.

2.03b: Last Name (60 characters)

Enter the legal spelling and format of the last name, using standard capitalization rules. DO NOT add punctuation or spaces where there is none.

Hyphens may be used to separate double last names (used in Hispanic names or by use of a maiden and married name, i.e., Cooper-Smith).

Apostrophes may be used in such names as O'Leary, O'Connor, etc.

Periods are permitted in the last name field for such names as St. John.

Spaces are permitted between syllables (i.e., Mc, Mac, La, etc.) and the main portion of the name if it is the way the person spells it.

Commas are never used in last names.

Suffixes are not permitted (for example, Jr., III or M.D.) in the last name field. (see Section 2.03i)
2.03c: First Name (15 characters)
Enter the legal spelling and format of the full first name, using standard capitalization rules.

Always enter the entire first name when available even if the person prefers to use a first initial and full middle name.

Use the ‘preferred first name’ field for preferred names that are exceptions to their first name.

DO NOT change a full name to an initial.

Hyphens may be used.

Apostrophes may be used.

Periods are used after a single character initial in the first name field when only an initial is available.

Single Character First Names should be entered with a period.

Spaces are permitted for double names, i.e., Mary Ann, Bobby Joe.

Commas are never used.

Titles or prefixes are NOT used in the first name field. Examples: Father, Sister or Sr., Dr., Mr., Mrs., should never be used in the first name field.

2.03d: Middle Name (15 characters)
Enter the legal spelling and format of the middle name, using standard capitalization rules. If only the middle initial is available, use it followed by a period. Enter the entire middle name if available for identification purposes.

DO NOT change a full middle name to an initial.

If no middle name exists, leave field blank.

Hyphens may be used to separate double names.

Apostrophes may be used.

Periods are used in the middle name field following a single character or for such middle names as St. John.

Spaces are permitted between multiple names.
Commas are never used.

Titles, prefixes, and suffixes are NOT used in this field.

2.03e: Preferred First Name (15 characters)
Preferred First Name may be entered into the preferred first name field when there are exceptions to the first name.

Example:
First Name = Elizabeth
Preferred Name = Lizzie

If no preferred name is given, leave the field blank.

If a person uses an initial for a preferred first name, the First Name and Middle Name fields should be written out and a single character (with period) and the preferred name will be used in preferred first name.

Examples:

First Name = Mary First Name = Christopher First Name = Mary
Middle Name = Eileen Middle Name = Paul Middle Name = Elizabeth
Preferred Name = M. Eileen Preferred Name = Paul Preferred Name = Mary Beth

2.03f: Legal Name
The Legal Name Field on the general person screen will not be used. The line should always be left blank.

Human Resources will keep the Social Security Name in the HR SSN name field rather than the “legal” name since depending on the document used (passport, birth certificate, etc.) the “legal” name may not be the same as the SSN name.

2.03g: Former Name
With the exception of corrections made due to data entry errors, it is our policy to maintain previous name information in the alternate name field using one of the name type codes established to accommodate the need for maiden names and previous last names when known.

2.03h: Prefix
All prefixes are to be entered into the prefix field using mixed-case with standard capitalization rules.

Do NOT put prefixes in the regular first, middle or last name fields.

The prefix must be followed with a period.

Below are examples of the more commonly used prefixes and recommended abbreviations.
<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr.</td>
<td>Doctor</td>
<td>Hon.</td>
<td>Honorable</td>
</tr>
<tr>
<td>Fr.</td>
<td>Father</td>
<td>Rev.</td>
<td>Reverend</td>
</tr>
<tr>
<td>Rev. Dr.</td>
<td>Reverend Doctor</td>
<td>Sr.</td>
<td>Sister</td>
</tr>
<tr>
<td>Msgr.</td>
<td>Monsignor</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2.03i: Suffix

All codes are to be entered into the suffix field using mixed-case with standard capitalization rules. Do NOT put suffixes in the regular first, middle or last name fields.

Do NOT use periods for religious orders, e.g. CSJ, IHM, SSND, etc.

Below are examples of commonly used suffixes and recommended abbreviations. The suffix field is not included on printed payroll checks and tax reports.

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sr.</td>
<td>Senior</td>
<td>MD</td>
<td>Doctor of Medicine</td>
</tr>
<tr>
<td>Jr.</td>
<td>Junior</td>
<td>Ph.D.</td>
<td>Doctor of Philosophy</td>
</tr>
<tr>
<td>CSJ</td>
<td>Sisters of St. Joseph</td>
<td>RN</td>
<td>Registered Nurse</td>
</tr>
<tr>
<td>D.D.S.</td>
<td>Dentist</td>
<td>II</td>
<td>Second</td>
</tr>
<tr>
<td>D.M.D.</td>
<td>Doctor of Dental Medicine</td>
<td>III</td>
<td>Third</td>
</tr>
<tr>
<td>Esq.</td>
<td>Esquire</td>
<td>IV</td>
<td>Fourth</td>
</tr>
<tr>
<td>JD</td>
<td>Juris Doctor</td>
<td>V</td>
<td>Fifth</td>
</tr>
</tbody>
</table>

2.03j: Non-person Name (60 characters)

Non-persons can be vendors, companies, organizations, suppliers, granting agencies, banks, institutions, government entities, or individuals that do business with the College.

All information is typed in mixed (upper/lower) case format. Enter the full legal name of the non-person without periods and commas (exception is Saint (St.) abbreviated).

The pound sign (#), percent sign (%), underscore (_) and asterisk (*) should NOT be used as they may cause Oracle database errors.

If a name is both a person and a business, separate records should be created and linked.

Articles (The, A or An) will be used in the beginning of a non-person name if it is part of the legal name, as it would appear on the W-9. When referring to the College, the naming convention is: “The College of St. Catherine”.
Acronyms will be entered as an alternate name unless it is the legal name of the company, e.g. 3M.

Hyphens may be used to separate double names.

Apostrophes may be used.

Periods are never used in an abbreviation in a company's name i.e., F & F Securities, with the exception of the abbreviation of Saint (St.).

Spaces are permitted between multiple names and single letter abbreviations. Do NOT add spaces where there are none.

Commas are not permitted.

NOTE: Ampersand "&" is used if it is part of the legal name of the company. If “and” is part of the legal name, use it.

For States, use the postal state abbreviation, i.e. for Minnesota use MN, MN Workforce.

The words American, National, and High School should be spelled out when possible.

If abbreviations are needed when the name is too long for the field, appropriate abbreviations include:

<table>
<thead>
<tr>
<th>Description</th>
<th>Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>Admin</td>
</tr>
<tr>
<td>Association</td>
<td>Assn</td>
</tr>
<tr>
<td>Community College</td>
<td>Comm Coll</td>
</tr>
<tr>
<td>Company</td>
<td>Co</td>
</tr>
<tr>
<td>Cooperative</td>
<td>Coop</td>
</tr>
<tr>
<td>Department</td>
<td>Dept</td>
</tr>
<tr>
<td>District</td>
<td>Dist</td>
</tr>
<tr>
<td>Foundation</td>
<td>Fndn</td>
</tr>
<tr>
<td>Incorporated</td>
<td>Inc</td>
</tr>
<tr>
<td>International</td>
<td>Intl</td>
</tr>
<tr>
<td>Management</td>
<td>Mgmt</td>
</tr>
<tr>
<td>Saint</td>
<td>Use as provided</td>
</tr>
<tr>
<td>University</td>
<td>Univ</td>
</tr>
</tbody>
</table>
2.04: ADDRESS STANDARDS
This section of the standards governs the address types, data entry and military addresses maintained by CSC for Person and Non-Person.

United States Post Office Standards will be used.

The pound sign (#), percent sign (%), underscore (_) and asterisk (*) should NOT be used as they may cause Oracle database errors.

2.04a: Changes to Addresses
When making address changes, in order to maintain address history, the old address and type should be inactivated and a new address with type should be inserted so that the old address is retained.

Never overwrite existing address information, unless correcting a typographical error.

2.04b: Entry of Address Types
The address type describes the type of address entered. Please see Appendix 3.02 for a full list of Address Types.

The following rules apply for the use of address types at CSC:
- When entering the address on address form, choose the address type most applicable for the person and/or non-person.
- Multiple address records (of either the same or differing address types) can be created and associated with a single telephone number, but only one telephone type may be designated as primary and active on the telephone form. There can be many inactive address types associated with a record. However, only one address and one phone number may be active per address and phone type.

2.04c: Street Addresses (30 characters per line of an address)
To facilitate timely mail delivery, please follow these standards when entering addresses:
- Postal Standard Abbreviations will be used (Ave, Rd, and Blvd).
- All information is typed in mixed-case (upper/lower) format.
- Address information should be entered from the top down; the Postal Service reads address information from the bottom up, moving from the more general to the more specific. Therefore a street address should be on a lower line than a unit or apartment number.

There are 3 lines available for entering addresses (not including name line and city/state/zip line). The fewest possible number of lines should be used to enter the address, starting with Address Line 1, then Address Line 2, and then Address Line 3.

The delivery address consists of the street number, street name, street type, street direction, and apartment or unit number (if any).

The pound sign (#), percent sign (%), underscore (_) and asterisk (*) should NOT be used as they may cause Oracle database errors.
Delivery address should always appear on Address Line 1, with the following exceptions:

- **“In Care Of”**
  Addresses appear on Line 1 with delivery address on Line 2.
  Do not use the % sign to indicate “care of.”
  c/o John Smith
  1812 Duncan Ave
  Chattanooga, TN 37404

- **Street Address with a P.O. Box:**
  Street address appears on Line 1 with P.O. Box on Line 2.
  1201 Broad St E
  PO Box 1001
  Falls Church, VA 22042

- **Unit Numbers** (apartments, suites, units, buildings)
  Unit numbers should always appear on Line 1 and street address on Line 2, using abbreviation standards.
  Suite 12
  3245 Belmont Ave E
  Saint Paul, MN 55102

- **Foreign addresses**
  Use as many lines as necessary, moving from the specific to the general. See “International Standards” below for further information.

- **Religious order addresses**
  Religious order appears on Line 1 and delivery address on Line 2.
  Sisters of St. Joseph of Carondelet
  1880 Randolph Ave
  Saint Paul, MN 55105

The hierarchy of address line information, starting from the top down, is:

- **Line 1:** Street Address, c/o name (if any), Street Address with PO Box (if any), Unit Numbers (if any), Religious Order (if any)
- **Line 2:** Street Address, PO Box (if any; for delivery if Street Address is included)
- **Line 3:** 2nd Street address line, if any

**2.04d: Non-Person Business Addresses**
The delivery address should be entered in the street address lines following the data standards. Do not include the company or organization name in the delivery address.
2.04e: Punctuation
Omit punctuation from addresses, except:
- Proper names with hyphens or apostrophes
- Fractional, decimal or hyphenated street numbers
- Ampersand (&) sign, when it is used in the proper spelling of a street or business name

The hyphen in Zip+4 code should not be used. For more information regarding zip code standards, refer to the ZIP/Postal Code section of this document.

2.04f: Unit Numbers
Unit numbers (such as apartment, suite, building etc.) should appear on the delivery address line 1, using one of the abbreviations from the list below.

Do not use the # sign. It affects Banner’s ability to generate letters.

Standard recommended abbreviations are:

<table>
<thead>
<tr>
<th>Description</th>
<th>Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apartment</td>
<td>Apt</td>
</tr>
<tr>
<td>Building</td>
<td>Bldg</td>
</tr>
<tr>
<td>Space</td>
<td>Sp</td>
</tr>
<tr>
<td>Room</td>
<td>Rm</td>
</tr>
<tr>
<td>Floor</td>
<td>Fl</td>
</tr>
<tr>
<td>Suite</td>
<td>Ste</td>
</tr>
<tr>
<td>Department</td>
<td>Dept</td>
</tr>
<tr>
<td>Number</td>
<td>No</td>
</tr>
</tbody>
</table>

Please see Appendix 3.01 for a full list of Unit abbreviations.

2.04g: Directional Indicators
Directional indicators, which are used to identify the geographic areas of a city, are abbreviated unless the directional indicator is the primary street name.

Directional Indicators may appear before or after the street name.

<table>
<thead>
<tr>
<th>Description</th>
<th>Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>East</td>
<td>E</td>
</tr>
<tr>
<td>West</td>
<td>W</td>
</tr>
<tr>
<td>North</td>
<td>N</td>
</tr>
<tr>
<td>South</td>
<td>S</td>
</tr>
<tr>
<td>Northeast</td>
<td>NE</td>
</tr>
<tr>
<td>Northwest</td>
<td>NW</td>
</tr>
<tr>
<td>Southeast</td>
<td>SE</td>
</tr>
<tr>
<td>Southwest</td>
<td>SW</td>
</tr>
</tbody>
</table>
Use the [http://www.usps.com/ncsc/lookups/abbreviations.html#states](http://www.usps.com/ncsc/lookups/abbreviations.html#states) site for the standard street designator abbreviations.

- Use Street Abbreviations as follows (See Appendix 3.01 for a full list of street suffix abbreviations):

<table>
<thead>
<tr>
<th>Description</th>
<th>Abbreviation</th>
<th>Description</th>
<th>Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alley</td>
<td>Aly</td>
<td>Park Park</td>
<td></td>
</tr>
<tr>
<td>Avenue</td>
<td>Ave</td>
<td>Parkway Pkwy</td>
<td></td>
</tr>
<tr>
<td>Boulevard</td>
<td>Blvd</td>
<td>Place Pl</td>
<td></td>
</tr>
<tr>
<td>Circle</td>
<td>Cir</td>
<td>Ridge Rdg</td>
<td></td>
</tr>
<tr>
<td>Court</td>
<td>Ct</td>
<td>River Riv</td>
<td></td>
</tr>
<tr>
<td>Drive</td>
<td>Dr</td>
<td>Road Rd</td>
<td></td>
</tr>
<tr>
<td>Heights</td>
<td>Hts</td>
<td>Terrace Ter</td>
<td></td>
</tr>
<tr>
<td>Highway</td>
<td>Hwy</td>
<td>Trail Trl</td>
<td></td>
</tr>
<tr>
<td>Lane</td>
<td>Ln</td>
<td>Way Way</td>
<td></td>
</tr>
</tbody>
</table>

2.04h: U.S. and Canada City, County, State and Zip/Postal Code
CSC has installed address validation software, which will automatically populate City, County, and Country whenever a U.S. or Canadian zip code is entered. To maintain good standardization, enter the zip/postal code first, then check the automatically populated City, County and State for accuracy, making changes only if necessary. Adhere to below standards if making changes or entering data by batch.

2.04i: City
All information is typed in mixed case format, i.e., not all caps or all lower.

Punctuation is never used and Saint is spelled out.

Canadian addresses must include the city in the City field and the Province in the State field.

2.04j: State/Province
State codes must be entered for all U.S. and Canadian addresses.

(See Appendix 3.01 for a full list of state abbreviations)

2.04k: County
The county code will be populated for all U.S. States in the Banner system.

Note: Any addresses already existing outside of MN without a county code, will not be automatically populated.
2.04l: Zip/Postal Code
Zip codes must be entered for all U.S. addresses (or postal codes for Canadian addresses).

For all other countries, the Zip code field is optional if that country has a Zip Code convention.

If a country zip code requires a hyphen, a hyphen may be used only for International zips.

For U.S. addresses, if given a zip+4, do not enter the hyphen.

U.S. Examples:
79601
796991032

For Canadian addresses, enter the six-digit zip code. Do not add spaces in Canadian zip codes.

Examples:
T2T2Y5
R2L1N4

2.04m: Nation
A nation code is required for all non-U.S. addresses (see International Addresses below). Do not enter a nation code for U.S. addresses (it will automatically be populated when you choose a Zip code or enter a known zip code).

2.04n: International Addresses
Enter full address as supplied. Enter foreign city in City field, foreign postal code (if known) in Zip/PC field and Nation code in Nation field.

If the International address does require a state code, place the state code after the city and separate with a comma in the city field IS A COMMA OK HERE?. Use state/province field only for U.S. and Canadian addresses. DO NOT use XX as a State code for a foreign address unless it is needed for Government requirements such as FASFA.

If the zip code requires a hyphen, a hyphen may be used only for International zips.

Enter all other relevant information on the three free-form address lines provided.

Examples:

<table>
<thead>
<tr>
<th>Name:</th>
<th>Nichole D Graham</th>
<th>Name:</th>
<th>Alma Wolfe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Line 1:</td>
<td>75 Eaton Ter</td>
<td>Address Line 1:</td>
<td>815 Half Way Pond</td>
</tr>
<tr>
<td>Address Line 2:</td>
<td></td>
<td>Address Line 2:</td>
<td>Georgetown</td>
</tr>
<tr>
<td>City:</td>
<td>London SW1 W8TN</td>
<td>City:</td>
<td>Grand Cayman</td>
</tr>
<tr>
<td>State:</td>
<td></td>
<td>State:</td>
<td></td>
</tr>
<tr>
<td>Zip:</td>
<td>GB</td>
<td>Zip:</td>
<td></td>
</tr>
<tr>
<td>Nation:</td>
<td>GB</td>
<td>Nation:</td>
<td>KY</td>
</tr>
</tbody>
</table>
2.04o: Military Addresses
Overseas military addresses must contain the APO (Army Post Office) or FPO (Fleet Post Office) designation along with a two character "state" abbreviation of AE, AP or AA and the zip code. For Air Force Base, enter city followed by “AFB” in City field. (See Appendix 3.01 for full list of military abbreviations):

AA for mail in the Americas other than Canada (340).

AE for mail going to Europe, the Middle East, Africa and Canada (090 through 098)

AP for mail destined to the Pacific (962 through 966)
2.05: TELEPHONE & E-MAIL STANDARDS
This section of the standards governs telephone types and what CSC roles can change which types of telephone number.

2.05a: 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.

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

2.05b: Entry of Telephone Types
The telephone type describes the type of telephone number entered. Please see Appendix 3.02 for a full list of Telephone/Fax Types.

The following rules apply for the use of telephone types at CSC:
- 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.

2.05c: Area Code
The three-digit area code must be entered for all phone numbers.

2.05d: Phone Number
Enter the seven-digit phone number without the hyphen between the third and fourth digits.

Example: 6746773 or 6768609.

2.05e: 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.
2.05f: International
International phone numbers are NOT entered on the Banner address form. Enter international phone numbers on the XXXTELE 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.

2.05g: E-Mail Address
The CSC e-mail type is system-generated and cannot be changed except by IT.

Please see Appendix 3.02 for a full list of E-mail Types.

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.stkate.edu).
2.06: MISCELLANEOUS GUIDELINES

2.06a: Date Standards
Dates are displayed in the following form: DD-MMM-YYYY (example: 23-SEP-2003).

Acceptable formats for date entry include (all of these result in a displayed date of 23-SEP-2002):

- MMDD (defaults to current year) – 0923
- MMDDYY – 092302
- MMDDYYYY – 09232002
- MM-DD-YY – 09-23-02
- MM/DD/YY – 09/23/02

You may also type a “T” in the date field to automatically default to the current date.

2.06b: Self Service Web Access
Standards may be created to update information through Self Service functionality via web access. Such services may include:

- Change in PIN and security question
- View and/or update Personal Information
- View and/or update Emergency Contacts
- View and/or update Benefit Deductions
- Update Marital Status
- Answer a survey
- Posting grades
- Registering for classes

The functionality and availability of such services will be determined by the individual units that are responsible for that information.
# APPENDICES

## APPENDIX 3.01: LIST OF ABBREVIATIONS

3.01a: States

<table>
<thead>
<tr>
<th>State/Possession</th>
<th>Abbreviation</th>
<th>State/Possession</th>
<th>Abbreviation</th>
<th>State/Possession</th>
<th>Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALABAMA</td>
<td>AL</td>
<td>KENTUCKY</td>
<td>KY</td>
<td>OHIO</td>
<td>OH</td>
</tr>
<tr>
<td>ALASKA</td>
<td>AK</td>
<td>LOUISIANA</td>
<td>LA</td>
<td>OKLAHOMA</td>
<td>OK</td>
</tr>
<tr>
<td>AMERICAN SAMOA</td>
<td>AS</td>
<td>MAINE</td>
<td>ME</td>
<td>OREGON</td>
<td>OR</td>
</tr>
<tr>
<td>ARIZONA</td>
<td>AZ</td>
<td>MARSHALL ISLA</td>
<td>MH</td>
<td>PALAU</td>
<td>PW</td>
</tr>
<tr>
<td>ARKANSAS</td>
<td>AR</td>
<td>MARYLAND</td>
<td>MD</td>
<td>PENNSYLVANIA</td>
<td>PA</td>
</tr>
<tr>
<td>CALIFORNIA</td>
<td>CA</td>
<td>MASSACHUSETTS</td>
<td>MA</td>
<td>PUERTO RICO</td>
<td>PR</td>
</tr>
<tr>
<td>COLORADO</td>
<td>CO</td>
<td>MICHIGAN</td>
<td>MI</td>
<td>RHODE ISLAND</td>
<td>RI</td>
</tr>
<tr>
<td>CONNECTICU’</td>
<td>CT</td>
<td>MINNESOTA</td>
<td>MN</td>
<td>SOUTH CAROLIN</td>
<td>SC</td>
</tr>
<tr>
<td>DELAWARE</td>
<td>DE</td>
<td>MISSISSIPPI</td>
<td>MS</td>
<td>SOUTH DAKOTA</td>
<td>SD</td>
</tr>
<tr>
<td>DISTRICT OF COLUMBIA</td>
<td>DC</td>
<td>MISSOURI</td>
<td>MO</td>
<td>TENNESSEE</td>
<td>TN</td>
</tr>
<tr>
<td>FEDERATED STATES OF MICRONESIA</td>
<td>FM</td>
<td>MONTANA</td>
<td>MT</td>
<td>TEXAS</td>
<td>TX</td>
</tr>
<tr>
<td>FLORIDA</td>
<td>FL</td>
<td>NEBRASKA</td>
<td>NE</td>
<td>UTAH</td>
<td>UT</td>
</tr>
<tr>
<td>GEORGIA</td>
<td>GA</td>
<td>NEVADA</td>
<td>NV</td>
<td>VERMONT</td>
<td>VT</td>
</tr>
<tr>
<td>GUAM</td>
<td>GU</td>
<td>NEW HAMPSHIRE</td>
<td>NH</td>
<td>VIRGIN ISLANDS</td>
<td>VI</td>
</tr>
<tr>
<td>HAWAII</td>
<td>HI</td>
<td>NEW JERSEY</td>
<td>NJ</td>
<td>VIRGINIA</td>
<td>VA</td>
</tr>
<tr>
<td>IDAHO</td>
<td>ID</td>
<td>NEW MEXICO</td>
<td>NM</td>
<td>WASHINGTON</td>
<td>WA</td>
</tr>
<tr>
<td>ILLINOIS</td>
<td>IL</td>
<td>NEW YORK</td>
<td>NY</td>
<td>WEST VIRGINA</td>
<td>WV</td>
</tr>
<tr>
<td>INDIANA</td>
<td>IN</td>
<td>NORTH CAROLIN</td>
<td>NC</td>
<td>WISCONSIN</td>
<td>WI</td>
</tr>
<tr>
<td>IOWA</td>
<td>IA</td>
<td>NORTH DAKOTA</td>
<td>ND</td>
<td>WYOMING</td>
<td>WY</td>
</tr>
<tr>
<td>KANSAS</td>
<td>KS</td>
<td>NORTHERN MARIANA ISLANDS</td>
<td>MP</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### 3.01b: Military

<table>
<thead>
<tr>
<th>Military &quot;State&quot;</th>
<th>Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Armed Forces Africa</td>
<td>AE</td>
</tr>
<tr>
<td>Armed Forces Americas (except Canada)</td>
<td>AA</td>
</tr>
<tr>
<td>Armed Forces Canada</td>
<td>AE</td>
</tr>
<tr>
<td>Armed Forces Europe</td>
<td>AE</td>
</tr>
<tr>
<td>Armed Forces Middle East</td>
<td>AE</td>
</tr>
<tr>
<td>Armed Forces Pacific</td>
<td>AP</td>
</tr>
</tbody>
</table>

### 3.01c: Units

<table>
<thead>
<tr>
<th>Name</th>
<th>Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
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APPENDIX 3.02: SHARED VALIDATION TABLES

3.02a: Address Types

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3.02b: Telephone/Fax Types

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3.02c: E-mail Types

3.02d: Name Types
Appendix 3.03

GENERAL PROCEDURES

3.03a: How to Change/Edit a Shared Table Procedure

3.03b: Requesting Access Procedure

1) The employee will complete the 1-hour on-line tutorial for a general overview of the system.
2) The employee will read and sign the Data Standards Acknowledgement form
3) The employee will complete an Access Request Form for access. These forms can be found at .... CREATE FORM!!!
4) The Access Request Form along with confirmation of completion of the tutorial and the Data Standards Acknowledgement will be submitted to the System Manager for approval.
5) After approval from the System Manager, a username and password will be requested from Information Technology. The completed forms will be submitted to Human Resources to keep in their official College file.
6) Security will be placed on the employee’s account based on the process established by each module they are gaining access to.

3.03c: How to Request Changes to the Data Standards Manual

3.03d: Investigation Procedure

3.03e: Web Self Service Procedures

3.03f: Requesting Custom Made Reports

3.03g: Proper Destruction of Private Data
Appendix 3.04

DATA STANDARDS ACKNOWLEDGEMENT FORM

I hereby certify that I have received the Data Standards Manual and understand the policies, rules, regulations and procedures described. I also agree that I will comply with the standards. I understand that any misconduct could result in disciplinary action up to and including termination from the College of St. Catherine.

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