

General Person Data Standards: A Brief Overview

Name & Demographic Standards	
Do	Don't
<ul style="list-style-type: none"> • Enter data using mixed uppercase and lowercase letters following standard capitalization rules. • Search first, BEFORE creating a new record or changing an existing record for a person or organization. Conduct an ID and name search to make sure the person or organization has not already been entered into the Lynx database. Thorough searching is necessary to prevent entering a duplicate record. • Use GUASYST to assist in determining the changes that are authorized for the General Person record. Obtain proper documentation before making changes to an employee, student, or vendor record (eg: Social Security Card, Marriage Certificate, etc). • In the KEY BLOCK use the legal spelling and format for first, middle and last names. • Enter the entire middle name if available for identification purposes. • Enter Single Character First Names with no period (i.e., J Jackson). Enter hyphens to separate double names (i.e., Cooper-Smith) in the alternate name type of SPEC. Enter space between last names that are not hyphenated (i.e., Monica Lou Creton Quinton...last name is entered as Creton Quinton, with no hyphen) or for a legal spelling of a vendor that uses spaces. • Enter companies that are recognized by an acronym in the key block using its acronym, e.g., IBM, ATT. The whole name of the company should be entered in the SPEC alternate name (e.g., IBM in Key Name International Business Machine Corporation in alternate name) to aid in searches and to avoid duplication. • Punctuation may be used (e.g., O'Leary, O'Connor) in the SPEC Alternate Name Type. Appropriate punctuation includes the comma, period, dash, colon, semi-colon, apostrophe, and quotation marks. • When updating the KEY BLOCK name, go to the Alternate Name block to identify the name change using the Name type field (eg: MAID; PREV) • Social Security Numbers are entered on XXXPERS and are searchable on GUIALT1. For International Students ONLY, DO enter the Key ID (W#) in the SSN field, replacing the W with an 8. (e.g. Key ID is W00234567, SSN field should read 800234567). • Fill in citizen type for all students and employees. Citizenship Type requires appropriate documentation. A person's citizenship is entered on the Person form XXXPERS. Valid values are found in the validation table STVCITZ. • Enter the ethnic code for all students and employees. (Non-U.S. citizens should all be groups with an ethnicity of "N") A person's ethnicity is entered on the Person form XXXPERS. Valid values are found in the validation table STVETHN. • All employees MUST be classified as male or female. Do attempt to classify gender whenever possible for all other people. 	<ul style="list-style-type: none"> • Don't enter a name type in the KEY BLOCK form of XXXIDEN. This should generally be blank. There are a few exceptions to this rule. Do not remove any name types you find. • In ALL of the KEY BLOCK name fields, DO NOT use the following symbols or punctuation: () < > / \ , . : ; ' " = - _ \$ + * # & ! % ? @ • Don't use symbols in the Alternate Name fields, only punctuation is appropriate in the SPEC name type. Don't use symbols or punctuation in any other name type. • Don't add Social security numbers via the ALTERNATE NAME/ID window on the XXXIDEN form. This creates a confidentiality breach of security. • Do NOT use titles, prefixes, and suffixes in the first or last name fields (e.g., Dr, Mr, Mrs). In situations where both a prefix and a suffix could be used (ie. Dr and MD), the value Dr should be added in the Prefix field leaving the Suffix field blank, unless otherwise noted by the individual. • Punctuation is NOT to be used in prefix and suffix fields, as they are part of the KEY BLOCK name fields. • Do NOT use the Preferred First Name Field – it is not a searchable field. Instead, utilize the Alternate Name type of NICK. • Do not populate the SSN field with a false SSN with the EXCEPTION of International STUDENTS as explained at left. • Do not populate the Legacy Code field on XXXPERS, it is not being used at the present. • Do not populate the Veteran File Number field on XXXPERS as it is not being utilized.

Data Entry Alternate Name Examples

- **Using NICK:** If the person uses their middle name more frequently than their first name, or they use a derivative of their first or middle name, or they go by a nick name, then enter an alternate name type of NICK.
 Example: Herman Isaac Jones in KEY name
 The Alternate name block with the name type NICK would be entered as:
 First Name: Isaac
 Middle name: (Blank or Null)
 Last Name: Jones
- **Using SPEC:** When a person's name contains punctuation, enter an alternate name type of SPEC:
 Example: Jennifer O Leary Jones in KEY name
 The Alternate name block with the name type SPEC would be entered as:
 First Name: Jennifer
 Middle name: (Blank or Null)
 Last Name: O'Leary-Jones
- **Using MAID or PREV:** When a person has requested a name change, and presented appropriate documentation, enter an Alternate name type of MAID or PREV as applies.
 Example: Jennifer O Leary is the KEY name changing to Jennifer Jones
 Update the Alternate Name Block with the name type of MAID or PREV, with the name info. rolling forward as:
 First Name: Jennifer
 Middle Name: (Blank or Null)
 Last Name: O Leary

Entering a Name Change

Do	Don't
<ul style="list-style-type: none"> • Name Changes are permitted with appropriate documentation (i.e., social security card, other legal documentation from the person). • All employees must change their name at the Payroll or Human Resources office. • All offices must follow the data hierarchy when name changes are necessary. See Page 4. 	<ul style="list-style-type: none"> • Legal name changes are not permitted via Lynx self-service.

Address Standards

Do	Don't				
<ul style="list-style-type: none"> • Abbreviate when entering address information. WSU requires that USPS abbreviation standards be used. See http://www.usps.com/ncsc/lookups/usps_abbreviation_s.htm • Use the Zip Code table GTVZIPC to populate the city and state so that consistency and accuracy can be maintained • Add the 4 digit extension to all zip codes. • Use http://zip4.usps.com/zip4/welcome.jsp to find the +4 zip extension • Add an abbreviated ending in lower case letters when the street name is a number.(e.g 1234 25th Street) • When the following information is given: Dr John F Smith Evergreen Bldg 1379 Del Monte Ave PO Box 2351 Lancaster, CA 93536-1234 Add it into the correct address types as shown below <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="width: 50%; text-align: center;">Permanent Address (PR)</th> <th style="width: 50%; text-align: center;">Mailing Address (MA)</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">Dr John F Smith Evergreen Bldg 1379 Del Monte Ave Lancaster, CA 93536-1234</td> <td style="padding: 5px;">Dr John F Smith PO Box 2351 Lancaster, CA 93536-1234</td> </tr> </tbody> </table> <ul style="list-style-type: none"> • Tie addresses to appropriate telephone and sequence numbers when known. 	Permanent Address (PR)	Mailing Address (MA)	Dr John F Smith Evergreen Bldg 1379 Del Monte Ave Lancaster, CA 93536-1234	Dr John F Smith PO Box 2351 Lancaster, CA 93536-1234	<ul style="list-style-type: none"> • Punctuation and symbols should not be used in any address line (exception: Alumni Address types). • Do not use the words 'RURAL,' 'RUTA RURAL,' 'RFD,' 'BUZON,' OR 'BZN.' • A leading zero before the route number is not necessary. The following addressing format is used for rural routes address: RR____, BOX____. • Do NOT mix Street Address and PO Box - Non-person LYNX address format allows three lines of street address information. Three address lines cause a problem when printing one-inch labels. If both the street address and PO Box number need to be maintained, enter the street address as the Permanent Address (PR) and the PO Box number as the Mailing Address (MA). (see example to left) • Do not enter data into the second address line until data has been entered into the first address line. Only use the first two lines. • Do NOT enter Canadian Provinces into the City Field. Note: Canadian addresses must include the city in the City Field and the Province in the State Field. Enter the code (Canada) into the Nation field. • Do NOT enter USA in the Nation field. Use this field only for addresses outside of the USA.
Permanent Address (PR)	Mailing Address (MA)				
Dr John F Smith Evergreen Bldg 1379 Del Monte Ave Lancaster, CA 93536-1234	Dr John F Smith PO Box 2351 Lancaster, CA 93536-1234				

Correct	Incorrect
Larry R Adams 123 E Fir St Apt 6 Lancaster, CA 93536-1234	Larry R. Adams 123 East Fir Street, Apartment #6 Lancaster, CA 93536-1234

Entering an Address Change

Do	Don't
<ul style="list-style-type: none"> • Review GUASYST and Page 4 of this document to determine if you have the authority to change each address type associated with a person or entity. • Correct addresses that fail to conform to the data standards • Inactivate old addresses before entering new addresses • Associate addresses with telephone types and sequence numbers • Associate addresses with change source types (STVASRC) 	<ul style="list-style-type: none"> • Overtype an old address with a new address

Date Standards

Do	Don't
<ul style="list-style-type: none"> • Lynx is set up to accept dates in the format MDY (Month, Day, Year). All dates should be entered as MM/DD/YYYY or MM-DD-YYYY or MMDDYYYY (e.g., 08/21/2003 or 08-21-2003 or 08212003) Lynx will always display the date as DD-MMM-YY no matter how it is entered. • REQUIRED: The Date of Birth (DOB) is required for all employees and students. It is entered on the Person form XXXPERS. 	<ul style="list-style-type: none"> • Do not enter false dates into the system. When a date is not available, leave the field blank.

Telephone Standards

<ul style="list-style-type: none"> • When an address is entered on the XXAIDEN form, the phone number can be entered as well. The address type, telephone type, and sequence numbers should match. • Additional telephone numbers can also be captured and entered on the XXATELE form. For example, CELL or FAX may not have an address but are important numbers to be stored.
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Deceased Flag

<p>When notified that an individual has died, check GUASYST and reference http://departments.weber.edu/qsupport&training/Data_Standards/Appendix.htm (Appendix I) to determine who should mark the deceased indicator on SPAPERS. Marking the deceased flag stops processes in the system. This may cause problems if the record is marked too soon (ie – completion of payroll cycles).</p>

Confidential Flag

Because of FERPA regulations regarding the confidentiality of student records, this flag is very critical. The Confidential Flag, which is set on the XXXPERS screen, will be added by the Registrar's Office or Human Resources and may be used by other offices, such as Alumni/Development. A warning message box will appear the first time the record is viewed and the confidential information will be visible on every form related to the individual.

This Flag indicates that a person wants all or part of their record kept confidential, that they want some or all of their information blocked from the Campus Directory and/or wants some or all of their information to NOT be published in other documents.

When marking the confidential flag on SPAPERS, the reasons for the confidential request should be entered on SPACMNT.

Duplicate Records *

When duplicate records are found or suspected, forward the W numbers of each record to the assigned person in your area on the multiple PIDM clean up hierarchy. See http://departments.weber.edu/qsupport&training/Data_Standards/Appendix.htm (Appendix G) in the data standards document.

***Note:** In Internet Native Banner (INB), the code of MPID is entered into the Prefix field of the Key Name and the Name Type Field for the 'bad' record on SPAIDEN when there are duplicate records for a person or entity. **DO NOT CONTINUE TO ADD DATA TO THE BAD RECORD!** Use the alternate name type to find the good record (the W number will be recorded there) and add data to that good record.

Hierarchy Indicating Who Can Change Records

Occasionally, modifications or changes need to be made to records. Before a record can be changed, however, the individual MUST look at GUASYST and determine which department can modify the record. We use the data standards hierarchy shown below for determining who can change the record. General Record Custodians

Order of precedence	Area of Responsibility	General Module	Contact Person
1	Employee	Human Resources & Payroll	<ul style="list-style-type: none"> • Dulcie Carlile, M/C 1021, ext. 6607 • Lorinda DeBoer, M/C 1021, ext. 6736
2	Employment Applicant	Human Resources	N/A
3	Vendor	Purchasing & PO	<ul style="list-style-type: none"> • Linda Kaiser, M/C 1013, ext. 6014
		Accounts Payable	<ul style="list-style-type: none"> • Carolyn Sciarini, M/C 1013, ext. 6018
4	Student on Financial Aid	Accounts Payable	<ul style="list-style-type: none"> • Toni Thompson, M/C 1014, ext. 6605
		Financial Aid Office	<ul style="list-style-type: none"> • Jayne Mook, M/C 1136, ext. 6583 • Karen Bennett, M/C 1136, ext. 6585
5	Student	Registrar Office	<ul style="list-style-type: none"> • Nancy Comer, M/C 1139, ext. 6746 • Claudia Sadler, M/C 1139, ext. 6589
6	Donor	Development Office	<ul style="list-style-type: none"> • Carol Ruden, M/C 4018, ext. 7135 • Marilyn Ryan, M/C 4018, ext. 7102
7	Alumnus	Alumnus Development	<ul style="list-style-type: none"> • Carol Ruden, M/C 4018, ext. 7135 • Marilyn Ryan, M/C 4018, ext. 7102
8	Student Applicant (Undergraduate & Graduate)	Admissions Office	<ul style="list-style-type: none"> • Sarah Padilla, M/C 1137, ext. 6743 • Janet Shaner, M/C 1137, ext. 6005
9	Friends of WSU	Development Office	<ul style="list-style-type: none"> • Carol Ruden, M/C 4018, ext. 7135 • Marilyn Ryan, M/C 4018, ext. 7102