

BANNER General Name and Address Data Entry Standards

Revised: August 7, 1997

1. GENERAL NOTES

There are two general rules:

- First, we will maintain the names of people as they so direct (with the exception of the prefix and suffix for which standards have been defined).
- Second, address data **will be** abbreviated using all standard post office abbreviations.

Please contact I&TS(2573) if you have data that does not appear to conform to these standards but must be entered in Banner or another system.

a. Special Characters

- Characters that should **not** be used: @#%*?";: These characters are used by ORACLE (the database manager).
- Characters that **can** be used: &- ' ()

b. Sorting Rules

Data will sort according to standard ORACLE sorting rules. Below are the most frequently used characters listed in descending sort order (a complete sort table can be obtained from I&TS).

<u>Character</u>	<u>Description</u>
	blank
'	apostrophe (used in names such as O'Connell)
	hyphen
0-9	numbers
@	at
A-Z	upper case letters
'	reverse apostrophe
a-z	lower case letters

1. NAME OF A PERSON

The name of a person should be entered as received or requested by a person unless Siena policies, or State or Federal regulations require legal documentation.

Changing the official name (verified name) of an applicant, student, alum, employee, or retiree in any Banner form (a) requires specific written documentation and (b) will be done only by specific offices (see below). The official name is entered into the basic identification forms in each module.

Some offices may wish to enter a "Preferred first name". This may be done via APNAME, PPAIDEN, or SPAIDEN. In SPAIDEN, the field name is SPBPERS_PREF_FIRST_NAME.

Offices that wish to maintain any different name type (other than "verified" and "preferred first name) must utilize the APAIDEN for in the IA system until Name Type becomes an active component of other systems.

Acceptable documentation includes a social security card, marriage license, divorce decree, adoption papers, court name change authorization, or driver's license. A signed statement by the individual and a copy of the documentation verifying the name change must be maintained. Any office can collect this information and forward it to the offices which will make the change. Only these offices are authorized to make the actual change to a name:

Alumni and Students – forward paper records to **Registrar**

Employees (non-student) and Retirees – forward paper records to **Human Resources**.

[IF an individual falls into multiple categories, it would be prudent to send paper copies to both the Registrar's and Human Resources offices.]

The name of a person can have the following components: prefix, first, middle, last and suffix. A person can have any combination of these components but must at a minimum have a first and last name (required fields in Banner). How data is entered will dictate how the data is sorted, and thus found and retrieved.

a. Prefixes¹

The prefix is a 20-character, free-text field. Enter the default prefixes of Mr. or Ms. unless (a) you are certain of a professional prefix such as Dr. or (b) otherwise requested by the person. If a person requests that a specific prefix be used with his/her name it should be standardized as outlined below.

Standard Prefixes

<u>Enter This</u>	<u>Prefix for This</u>
Br.	Brother (religious order)
Deacon	
Dr.	Dentist, Doctor, Physician, Professor, Veterinarian*
Miss	Single Woman
Most Rev.	
Mr.	Man (default)
Mrs.	Married Woman
Ms.	Woman (default)
Msgr.	Monsignor
Rabbi	
Rev. or Fr.	Clergyman or Priest
Right Rev.	
Sen.	
Sr.	Sister (religious order)
The Honorable	Priest, Clergyman, Commissioner, Bishop, Judge, Minister, Ambassador, Attorney General, Governor, Mayor, Congress(Representatives/Senators)

Compound Prefixes for Couples

Use the correct prefix for both individuals when addressing mail to a couple who share the same surname, i.e.

Dr. and Dr. Smith
 Dr. and Mr. Smith
 Dr. and Mrs. Smith

¹ Note: The suffix should **not** be used if the prefix is used. As a general rule, Siena will address people in a "non professional" context (e.g., write to them using their home address) which means the prefix rather than professional suffix should be used as outlined below. See suffixes (Section 2d) for further information

Examples: Attorney: John Smith, Esq. (home address) or
 John R. Smith, Attorney-at-Law (office address)
 Dentist: Dr. Amelia R. Smith (home address) or
 Amelia R. Smith, D.D.S. (office address)

Physician: Dr. John R. Smith (home address) or
 John R. Smith, M.D. (office address)

Veterinarian: Dr. John Smith (home address) or
 John Smith, D.V.M. (office address)

b. Military Prefixes

Official military prefixes are written in uppercase with periods.

<u>Enter This</u>	<u>It Means This</u>	<u>Enter This</u>	<u>It Means This</u>
ADM.	Admiral	LCDR.	Lieutenant Commander
AMN.	Airman	LT.	Lieutenant
BGEN.	Brigadier General	MAJ.	Major
CAPT.	Captain (Navy)	MIDN.	Midshipman
CPT.	Captain (Army)	MGEN.	Major General
CDR.	Commander	MSGT.	Master Sergeant
COL.	Colonel	PVT.	Private
COMO.	Commodore	SGT.	Sergeant
CPL.	Corporal	SSGT.	Staff Sergeant
CPO.	Chief Petty Officer	1LT.	First Lieutenant
ENS.	Ensign	2LT.	Second Lieutenant
GEN.	General		

c. First, Middle and Last Name

The name field in Banner will be used for the formal name of an individual. Nicknames should not be used in the name field (there is a “preferred salutation” available in some modules where nicknames may be used). As with other name fields, the data should be entered as received from the person – recognizing that the person should be asked for their official name and not a nickname- following the general guidelines and standards provided below for capitalization, initials, punctuation, etc.

<u>First</u>	<u>Middle</u>	<u>Last</u>	<u>Guideline</u>
Joseph		Smith	Capitalize the first letter of each word.
Bobby Joe		Smith	First names that are two words should be entered in the first name field using spaces to separate the word. Note that any one giving “Bobby Joe” or a similar name as a first name should be asked if that is their legal or nickname.
B. Joeseeph		Smith	Single character first names should be entered with a period followed by a space then the middle name (use the “preferred first name” field in APANAME to enter first

Joseph	M.	Smith	name as just “Joseph” or “Joe”). Only use the full middle name if requested by the person otherwise use the initial followed by a period. Note: There are some people who have no period, such as Harry S Truman, so when in doubt ask the person their preference.
Jane	Long	Reed	A person may request that their pre-marital (maiden) name be retained as a middle name. In this case use the middle name field to write out the pre-marital name.
Jane	A.	Long-Reed	If the last name is hyphenated enter it without spaces.

The following name styles are often difficult to enter correctly. When in doubt, please try to contact the individuals to determine the correct spelling and spacing of letters and punctuation marks in their names. If you find the name was entered incorrectly, please forward the name and correct information to the Registrar’s Office (STUDENTS & ALUMNI), Admissions Office (APPLICANTS and CONFIRMED STUDENTS) or Human Resources (EMPLOYEES).

Jane	A.	O’Leary	If the last name uses an apostrophe, enter it without spaces <u>unless</u> the person requests otherwise.
James		Van Buren	Enter the name as you receive it from the constituent (e.g., if the person uses a space between words, enter a space).

d. Suffixes

The suffix field is a 20-character, free-text field. Suffixes should be entered according to the standards provided below and entered when requested by the person. Suffixes may be combined as needed (e.g., USA Ret.; M.D., F.A.A.P.). Suffixes without definition are those appearing on our alumni records with no definition.

<u>Enter This</u>	<u>It Means This</u>		
		M.D.	Medical Doctor
		M.S.W.	Masters in Social Work
I	First	O.C.D.	
II	Second	O.D.	Doctor of Optometry
III	Third	O.F.M.	Order of Friars Minor
IV	Fourth		
V	Fifth	O.P.	Order of Preachers
C.F.C.	Certified Financial Planner	O.S.B.	Order of St. Benedict
C.F.C.	Certified Financial Planner	O.S.F.	
C.L.U.	Chartered Life Underwriter	P.A.	Physician’s Assistant
C.N.D.		P.B.V.M.	Presentation of the Blessed Virgin Mary
C.P.A.	Certified Public Accountant		
C.P.C.		Ph. D.	Doctor of Philosophy
C.P.C.U.	Certified Property and Casualty Underwriter	R.D.H.	
C.S.C.	Congregation of Holy Cross	R.G.S.	Sisters of Our Lady of Charity of the Good Shepard

C.S.J.	Sisters of St. Joseph	R.N.	Registered Nurse
C.S.P.	Congregation of St. Paul	R.S.H.M.	
C.S.W.	Certified Social Worker	R.S.M.	Religious Sisters of Mercy
D.C.	Doctor of Chiropractic Medicine	Ret.	Retired
D.D.	Doctor of Divinity	S.A.	
D.D.S.	Doctor of Dental Surgery	S.A.C.	
D.M.D.	Doctor of Dental Medicine	S.F.O.	Secular Franciscan Order
D.O.	Doctor of Osteopathy	S.J.	Society of Jesus
Esq.	Esquire	S.R.P.A.	
F.A.A.P.	Fellow, American Academy of Pediatrics	S.S.N.D.	
F.M.D.M.		Sr.	Senior
F.S.C.		USA	United States Army
I.C.M.		USAF	United States Air Force
J.D.	Juris Doctor	USMC	United States Marine Corps
Jr.	Junior	USN	United States Navy
L.L.P.	Limited Law Practice	V.M.D.	Doctor of Veterinary Medicine
L.P.N.	Licensed Practical Nurse		
M.A.I.	Member of the Appraisal Insitute		

2. NAME OF A NON-PERSON (Organization, Corporation, Foundation, Vendor or Agency) A non-person in Banner can be a corporation, foundation, vendor, or agency.

a. Abbreviations

All non-person records will follow the same abbreviation standards—always abbreviate the words listed below. Please note that punctuation is used only to appropriately separate words or identify initials of a person.

<u>Enter This</u>	<u>It Means This</u>	Assoc	Associate
Assn	Association	Assocs	Associates
Co	Company	<u>Enter This</u>	<u>It Means This</u>
Corp	Corporation	Intl	International
Dept	Department	Inc	Incorporated
		Ltd	Limited
		Soc	Society
		St.	Saint
		Univ	University

b. Full Organization Names

A non-person in Banner may be a corporation, foundation, vendor, or agency—any type of organization. Organization names should be entered according to listings found in corporate directories or correspondence from the organization (i.e. letterhead, checks, etc.). The exceptions, however are outlined below.

<u>Enter This</u>	<u>Guidelines</u>
Air Reduction Company Inc	Commas should <u>not</u> be used between corporate identifiers (Inc, Co, Corp) and periods should <u>not</u> be used when abbreviating corporate identifiers.
Hogan, Strunk and Burns	Commas <u>should</u> be used between names.

F.G. Woods Foundation	When the organization name is the name of a person it should be entered with periods after the initials and <u>no space</u> between the double initials.
Gregory & Marie Stahl Foundation ABC	Enter names with spaces between words and special characters. Acronyms and universally accepted abbreviations should <u>not</u> use periods.
NYS Department of Energy Bank of New England	Prepositions and conjunctions such as: and, in, of, for, the etc. should be entered in all lower case.
Baird & Warner C.Brewer and Company Ltd Univeristy of Rochester	The use of “and” or “&” should the same as the used by the organization itself (see letterhead or corporate directory) University and College names should be entered as received/preffered by the institution.
Syracuse University	

c. Use of the article The:

When a non-person name begins with “The”, such as “The Travelers’ Insurance Company” or “The Lawrence Group”, the article should be used consistently. This allows mailings and checks to use the complete and formal name of the organization. However, placing “The” in front of the rest of the name creates some minor issues with sorting non-persons alphabetically and in querying to determine if the non-person already exists in the database. To deal with these issues, follow this procedure:

- ⇒ When you first enter the name of a non-person that begins with “The”, enter it without the “The” and save the name.
 - ⇒ Next, change the name-this time using the word “The” in the name and save it.
- What happens is that you created a “current name”-e.g. “The Travelers’ Insurance Company” and what Banner calls a “previous name”-e.g. “Travelers’ Insurance Company”. Banner treats the most recently entered name as “current” and all other names associated with that record as “previous”. This will improve the ability to query on names to avoid duplicated and will make it easier to sort alphabetically without getting dozens of companies starting with “The” lumped together.

3. STREET ADDRESSES

- ◆ Addresses should be entered using mixed case with approved postal abbreviations.
- ◆ Punctuation should be used only to separate a person’s initials
- ◆ Do not use periods in abbreviations

a. Guidelines

<u>Do</u> W 33 rd St SW 98 th St	<u>Don’t</u> West 33 rd Street Southwest 98 th St	<u>Rule</u> Abbreviate indicators such as St <u>without</u> periods
31 North St	31 N St	If a directional is the street name it should <u>never</u> be abbreviated.
<u>Do</u> 10 Bay Dr NE	<u>Don’t</u> 10 Bay Dr, NE	<u>Rule</u> Periods and commas should not be used in directionals.

123 33rd St	123 33RD St	Enter “rd”, “th” and “st” in lower case with no periods.
Apt 33 B	Apartment #33 B	Abbreviate “apartment”; Do not use special characters like the “#” sign.
Apt 33 B	Apartment 33-B	Insert a space between apartment number and alpha character – no hyphen.
RR1 Box 68 A	R.R. #1, Box 68A	Enter Rural Route as RR even if Rural Delivery (RD) is specified. Enter with <u>no space</u> between RR and number. Omit the comma and # sign. Insert a space between box number and alpha character.
PO Box 1234	P.O. Box 1234	Enter Post Office Box as PO without periods.

b. Standard Address Line Abbreviations

When abbreviating, use these standards:

DIRECTIONALS

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

UNITS

Apartment	Apt
Building	Bldg
Care of	c/o
Floor	Fl
Office	Ofc
Room	Rm
Suite	Ste
Tower	Twr

DESCRIPTORS

Beach	Bch
Center	Ctr
Fort	Ft
Heights	Hts
Mount	Mt
Mountain	Mtn
Point	Pt
Ridge	Rdg
Saint	St
Spring	Spg
Springs	Spgs
Valley	Vly
Village	Vlg

POST OFFICE/RURAL

DESIGNATIONS

Post Office	PO
Post Office Box	PO Box
Post Office Drawer	PO Drawer
Route	Rte
Rural Free District	RFD

STREETS

Avenue	Ave
Boulevard	Blvd
Circle	Cir
Court	Ct
Crescent	Cres
Drive	Dr
Place	Pl
Plaza	Plz

Road	Rd
Square	Sq
Station	Sta
Street	St
Terrace	Ter
Trail	Tr
Causeway	Cswy
Expressway	Expy
Extension	Ext
Freeway	Frwy
Highway	Hwy
Parkway	Pkwy
Turnpike	Tpk

c. Home/Residence Address Lines

Banner provides for **five lines of information** for names and addresses. It is crucial to understand what these lines are for or your mailings will never come out the way they should.

Line 1 The name of the individual or organization. Banner calls this the name line; it is not considered an address line.

Lines 2,3, and 4 These are the 3 lines of address of 30 characters each. The data on the address lines should contain delivery data. *The first address line must always be entered* (i.e. what is referred to here as Line 2 is actually what Banner calls the first address line). These three address lines do *not* include city, state, and zip.

Line 5 The city, state and zip line. **Do not** include city, state, and zip data on the address lines.

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

One Address Line: If there is one line of address, enter it on **Line # 1**:

RR1 Box 68 A-----> This is the primary delivery data and should be entered on line #1.
Hamilton, NY 13346

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

16 Willow Drive----> This is **secondary** delivery data
RR1 Box 68 A-----> This is **primary** delivery data
Hamilton, NY 13346

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

Willow Farms-----> This is the **tertiary** delivery data
16 Willow Drive---> This is the **secondary** delivery data
RR1 Box 68 A -----> This is the **primary** delivery data
Hamilton, NY 13346

d. Business/Organization Address Lines

The guidelines for business/organization addresses apply to two types of records: (1) a record for a person (in the case of a person who prefers to use the business address as the preferred mailing address), or (2) a record for an organization. The same general rules as described in the previous sections apply to these records except that business information (such as the company name, department, building, etc.) is entered as part of the address.

EXAMPLES

Corporate Address for an Organization:

Name:	IBM	-----Organization Name
Address Line #1:	Corporate Headquarters	-----Department Information
Address Line #2:	Twin Towers Building, Suite 100	-----Secondary Delivery Data*
Address Line #3:	365 Boylston St	-----Primary Delivery Data
City, State, Zip:	Boston, MA 02134	

*Note: As a general rule, suite numbers, building names, etc. should appear on Address Line #2 and the street address, PO box and such data should appear on Address Line #3.

Corporate Address with an “Attention” to a Person:

Name:	IBM	---Organization Name
Address Line #1:	Ms. Kristi Pegarella	---Attention Line
Address Line #2:	VP, Marketing and Sales	---Title and/or Department
Address Line #3:	365 Boylston St	---Primary Delivery Data
City, State, Zip:	Boston, MA 02134	

Person Address with Business as the Preferred Address:

Name:	Ms. Marilyn Zube	---Name (Prefix, First, Middle, Last)
Address Line #1:	IBM	---Company
Address Line #2:	VP, Marketing & Sales	---Title and/or Department*
Address Line #3:	365 Boylston St	---Primary Delivery Data
City, State, Zip:	Boston, MA 02134	

*If there is not enough room for both title and department, use the department name.

Siena Address for Student (using the “SI” address type in Banner):

Name:	Ms. Ann White	---Name of Student
Address Line #1:	Siena College	---Name of Institution
Address Line #2:	Box 1134	---Siena PO Box number
Address Line #3:		
City, State, Zip:	Loudonville, NY 12211	

Siena Address for Employees (using the “SI” address type in Banner):

Name:	Ms. Mary Helen Donnelly	---Name of Employee
Address Line #1:	Siena College	---Name of Institution
Address Line #2:	Information & Tech Services	---Title and/or Department*
Address Line #3:	101 Hines Hall	---Room and Building
City, State, Zip:	Loudonville, NY 12211	

*If there is not enough room for both title and department, use the department.

4. City, State, Zip and County

a. City

The city field is a free text, 20- character field that generally will be automatically entered for all U.S. addresses (based on the zip code data). We will load zip code data based on currently used mailing addresses, so there may occasionally be the need to enter a city name manually. City names should not be abbreviated. All foreign city names will have to be manually entered.

b. State

The state field is a 3-character coded field. The validation table STVSTAT lists codes for U.S. states and Canadian Provinces. This field should be **left blank** for foreign addresses except for overseas military address (see International Address Standards) and Canadian addresses (in which case the Province code should be used).

c. Zip Code

Siena will obtain City, State, Zip and County data. Data will be loaded into the Zip Code Validation Form (GTVZIPC) in Banner. The zip code field is a free text, 10-character field. If the zip+4 number is to be used, the hyphen must be entered.

d. County

The county field is a 5-character, coded field. The validation table STVNATN contains codes. The codes on this table are entered in all capital letters in order to print properly on labels (postal requirement). This field should be left **blank** for United States addresses.

5. Military Addresses

Military addresses must contain either an APO (Army Post Office) or FPO (Fleet Post Office) designation.

a. Overseas

Address Lines-

For overseas APO/FPO addresses, the address lines must contain the following:

PCS (or unit) number,

Box number or Ship name.

Examples:

SGT. Noel Hogan

PCS 908 Box 111

APO AE 09777

OR

CAPT. James Serbalik

B Division

USS North Dakota

FPO AA 34093

City: APO and FPO should be put in the CITY name field.

State: Use one of the following codes:

AE Europe, Middle East, Africa and Canada

AP Pacific

AA Americas(excluding Canada)

Zip: Enter zip code.

b. Domestic Military

ADDRESS LINES: Should follow regular mail standards (as outlined in previous sections)

CITY: AFB should be put in the CITY name field after the name of the city.

STATE: Use the U.S. state codes.

Example: Minot AFB, ND 58704

City	Code	State	Zip
		Military	

6. INTERNATIONAL MAILING STANDARDS

The most important rule in foreign addresses is that the name of the country must appear on the last line of the address in all capital letters. Beyond that, each country has its own standards (just as the US).

Addresses should be entered as received with a minimum of the following data:

- (1) Address Line #1
- (2) City
- (3) Nation

Foreign addresses vary in their use of State (see guidelines below for Canada) and Zip Code.

When in doubt about formatting, abbreviating and general interpretation of foreign addresses call **The Study Abroad Office or the Admissions Office**.

CANADA—Provinces and territories are entered in the STATE field using the following codes:

Alberta	AB
British Columbia	BC
Manitoba	MB
New Brunswick	NB
Newfoundland	NF
Northwest Territories	NT
Nova Scotia	NS
Ontario	ON
Prince Edward Island	PE
Quebec	PQ
Saskatchewan	Sk
Yukon Territory	YT