

## Data Standards Guidelines Summary

This document does **not** replace the “*Guidelines for Data Standards, Data Integrity and Security*” document. You should read the FULL text for further explanation located at

<http://www.vcu.edu/cie/pdfs/datastandarddoc.pdf>

### Rules for Clean and Accurate Records

- **Search first!!!**. Before you create a new record for a person or organization, you MUST conduct an exhaustive search to be sure that person or entity has not already been entered in the Banner system. Each user in every office MUST conduct a thorough search to prevent entering a duplicate record for the same person/entity. Please see the searching instructions for GUIALTI.
- **Data changes**. Make data changes ONLY when you have that authority, and when you follow the procedures established by the owner/manager of the data you want to change.
- **Remember** - some data fields have specific data entry rules. This list is NOT all inclusive.

### Person and Non-Person Data Standards

<u>Data Item</u>	<u>Standard</u>	<u>Information</u>
<b>General Punctuation</b>		
<i>Periods</i>	Avoid using periods.	
<i>Commas</i>	Avoid using.	
<i>Pound (#) or percent (%)</i>	Must not be used in any data field.	
<b>Name Standards</b>		
<i>Name Fields (general)</i>	Enter legal spelling as provided. Employee names <b>must</b> match Social Security Card. Type all names in mixed case format. First letter capitalized, followed by lower case, as in “Mary Hill”. Use full names, as in Suzanne, not Sue, Robert, not Bob. No nicknames.	
<i>Name Punctuation</i>	As needed, but NO space before or after, as in “Brown-Smith or O’Conner” No titles, suffixes or prefixes in any name field. Use the designated Prefix or Suffix fields as described below.	
Adhere to U.S. Postal Service Addressing Standards. <a href="http://pe.usps.gov/text/pub28/welcome.htm">http://pe.usps.gov/text/pub28/welcome.htm</a>	Periods are NOT used after single character first names or middle initials. Ex. J Mary Smith If no Middle Name, leave blank. Non-English characters should NOT be entered! Do NOT use commas, # (pound sign), nor the % (percent sign) anywhere in any data field!	
	Visit <a href="http://pe.usps.gov/text/pub28/welcome.htm">http://pe.usps.gov/text/pub28/welcome.htm</a> or <a href="http://pe.usps.gov/cpim/ftp/pubs/Pub28/pub28.pdf">http://pe.usps.gov/cpim/ftp/pubs/Pub28/pub28.pdf</a> for the complete USPS standards manual.	
<i>Prefixes/Suffixes</i>	Enter any titles, prefixes and/or suffixes here. Periods are <b>NOT</b> used. (Ms, Mr, or Jr, Sr, III) Exception: Do NOT enter degree designations (PhD, MD, DDS) in suffix fields. See special instructions in HR. (New Hire, PPAGENL)	
<i>Length</i>	If value exceeds field length, care should be used to accommodate entering as much of the data as possible.	
<i>Spaces</i>	Enter name as shown, including spacing within names (such as Mc( <i>space</i> )Donald or McDonald). Spaces ARE permitted between multiple names but <u>not</u> between hyphens. (i.e., Mary Ann, Bobby Joe, T Joseph Brown-Jones, Smith King & Jones Inc, J P Morgan & Co).	
<i>Multiple Names</i>	When two last names are un-hyphenated e.g., “Smith Jones”, request how the name combination should be entered, as Middle & Last names, or, all in Last name field.	
<i>Business Non-Person Terms</i>	Hyphens, apostrophes, and spaces are allowed if they are the <u>legal</u> spelling and format.	
Adhere to U.S.P.S. Addressing Standards.	Company names legally known by their initials should be entered as such. (IBM, SCT). Periods are <b>NOT</b> used. The ampersand (&) is used <b>ONLY</b> when part of a formal name (e.g., Baltimore & Ohio Railroad). Otherwise, spell out the word “AND”.	

## Address Type Standards

<i>Address Type</i>	Entities may have multiple address records. Click the field search icon for complete list of approved codes.
<i>Street Address Standards</i>	Type in mixed case format. Banner allows three lines of street address information. Banner requires address line one must be completed. For P. O. boxes, enter "PO Box" and the number. <b>NO</b> spaces or periods between P and O. For 2 lines of address, enter as two separate lines with the street number and name on line one: <b>1201 BROAD ST E</b> <b>PO BOX 1001</b>
<b>Adhere to U.S. Postal Service Addressing Standards. Visit <a href="http://pe.usps.gov/text/pub28/welcome.htm">http://pe.usps.gov/text/pub28/welcome.htm</a></b>	Rural Route addresses = RR < number> Box < number> as in" RR 23 Box 674" Enter international addresses as supplied by the source, as they differ from country to county.
<i>Address Punctuation</i>	Slashes may be used for clarity or designated fractions (1/2). Hyphens are to be <u>replaced</u> by a space in the address. "324-19" should be "324 19"
<i>Address Symbols</i>	Do NOT use symbols or phrases such as "%" (in care of) or "In Care of" use "C/O". The pound sign (#) and percent sign (%) must not be used.
<i>Secondary Address and Unit Designators</i>	If the address is a multi-unit apartment or building, place the room, suite, or apartment number to the right of the street address on the first address line separated by a space, if space permits. Compass directions to identify the geographic areas of a city are always abbreviated as UPPER CASE letters. No punctuation! W = West, NE = North East.
<i>Military Address Standards</i>	The APO or FPO designation entered in the <u>City</u> field, with a two character 'state' abbreviation and the ZIP code or ZIP+4 code. One of the following should be entered in the 'state' field: <b><u>AE</u></b> for Armed Forces in Europe, the Middle East, Africa, and Canada; <b><u>AP</u></b> for the Pacific and <b><u>AA</u></b> for the Americas excluding Canada. Must have proper ZIP code.
<i>City</i>	Typed in mixed case format, not all caps or all lower. Punctuation is NEVER used. Type the full name of the city. No city abbreviations allowed, unless the city name is longer than 20 characters.
<i>State and Province</i>	State codes must be entered for all U.S. and Canadian (Province) addresses as two-letter state abbreviation, UPPER case, no punctuation, as in VA, MD, NC, PA.
<i>County Codes</i>	Banner will fill the county code with a default value derived from the ZIP code, if ZIP entered first.
<i>Zip Codes</i>	Zip codes must be entered for all U.S. addresses. The preferred method for data entry is 1. Navigate to the ZIP field and enter the 5 digit ZIP code, press TAB 2. City and State fields will automatically populate with the correct USPS spelling for City and State. 3. Then, if available, enter a hyphen and the last four digits of the ZIP after the county is populated automatically. (Enter a hyphen between the fifth and sixth digits). Canadian 6-digit zip codes are entered as 3 characters ( <i>space</i> ) 3 characters (X4T 2P7)
<i>Nation Codes</i>	Required for only NON-U.S. addresses only. Choose two-digit alphanumeric value, all letters entered in uppercase. Will populate country name when chosen from field values. See search icon list of values.
<i>Campus Address</i>	Follow VCU Mail Service standards. Address must have a department name and 6-digit box number on the next line of address.
<b>Telephone Types</b>	
<i>Telephone Type</i>	The telephone type describes the type of telephone number entered. Must have ONE primary phone type. Click the field search icon for complete list of approved codes.
<i>Area code</i>	Enter 3-digit area code, no parentheses, for all phone numbers.
<i>Telephone Number</i>	Enter the seven-digit phone number WITHOUT the hyphen. Extension numbers are entered in the third telephone field, up to 4 digits.
<b>Date Standards</b>	
<i>Dates</i> This includes birth dates, work dates, service dates.	All dates should be entered as MMDDYYYY format. The month (MM) must be 01 through 12. (Use a leading zero on 1-9, as in 01) The day (DD) must be 01 through 31. The year is entered as all four digits of the year. <b>NOTE: Certain forms require the format of <u>DD-MON-YYYY</u>. Do not key dashes or slashes in date fields.</b>

### *Personal Information*

***Tax Identification Number Standards*** Social security numbers (SSN) and Federal Identification Numbers (FIN) must be entered for all employees of any type, students receiving financial aid, and vendors. Enter the nine-digit number, omitting the hyphens.

***Date of Birth*** The date of birth is required for employees per format above.

**For the following fields, double click in the field for the list of valid values**

***Citizen Type*** Enter Y to identify U.S. residents, N to identify Non-US

***Legacy Codes*** Legacy codes are used to identify a person's past legacy association or past family associations with VCU.

***Marital Codes*** Marital codes are self-reported by employee/student.

***Religion Codes*** Codes associated with the religious affiliation identified by a person.

***Ethnic Codes*** Race/ethnicity is self-reported by students/employees.

***Visa Codes*** The valid codes for the various Visa statuses.

***Relationship Codes*** The valid emergency contact relationships.

***Veteran Codes*** The valid codes for various veteran statuses.

This list is NOT all-inclusive. **For the complete and up to date data standards document, please visit <http://www.vcu.edu/cie/pdfs/datastandarddoc.pdf>**