

# Data Entry Standards

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## REASONS FOR DATA ENTRY STANDARDS

It is the purpose of this set of data entry standards to:

- reduce duplicate records in LancerPoint
- promote easy search capability through uniform data entry in LancerPoint
- produce accurate reports from data entered into LancerPoint

## GENERAL GUIDELINES

Names and addresses in LancerPoint should be in mixed case letters (both upper and lowercase letters) so that when a name or address is printed on correspondence, it looks consistent and professional.

- Enter all data using mixed case and standard capitalization rules
- Never store the percent symbol (%) in a data field
- Never store the ampersand symbol (&) except in an address or business name
- Spell out all data unless it is necessary to abbreviate words to fit lines into fields. Exceptions are made for addresses, such as directional (N, S, E, W, etc.)
- Enter punctuation in a name only when it is a part of the official name, or for a single character first name, or for an empty first name

## AVOIDING DUPLICATE RECORDS

Creating a duplicate record for a person or organization for which a record already exists in LancerPoint can lead to loss of data or incorrect results. Avoid creating duplicate records by following these steps below.

Before creating a new record for a person or organization:

- Conduct an identification and name search to make sure the person or organization has not already been entered into the LancerPoint system
- Search for a person using social security number, birth date, and all current and previous names
- Do a “soundex” search. A “soundex” search is when you search by portion of name such as “Sm” which will retrieve all names that begin with these letters.**
- Verify that the correct record has been found by checking the birth date and address
- If no record is found—you should add a new record
- Use Common Matching to simplify searching for existing records
- Ask your supervisor if Common Matching is in place.

**Example:** To find Mac Donald, you must account for McDonald, Mc Donald, MacDonald, and Mac Donald. You can search “M%D%” will retrieve all of these records (soundex search).

## DATA INTEGRITY ACROSS MULTIPLE MODULES

LancerPoint offers **the potential** for better service and convenience to our users and greater accuracy across PCC **IF** we follow data rules. Each department must be aware of and follow data “rules”. The Data Standards Committee provides an opportunity for individual departments to express their business needs the universal rules were designed. Following these data rules will help with the effectiveness of the overall LancerPoint system. Name change practices are a key example where specific policies must be followed depending on the type of record. Whenever someone requests a name change it is necessary to determine (using GUASYST) in which modules the record occurs. The uniform name change policies are outlined below.

## CREATION OF NEW PERSON OR NON-PERSON RECORD

Person and non-person records are created the first time someone enters them in LancerPoint (Admission Application, Employment Application, Requisition, etc.). The following offices have the ability to create a new student or general person or non-person record.

Office	Type of Entity
Admissions & Records	Non-person, Prospect, Admitted Student, Student
Financial Aid	Financial Aid Prospect, Financial Aid non-person
Community Education Center	Student
Business Services	Third Party Vender, non-person Vendor (Non-Person), person
Human Resources	Applicant, Employee
Foundation	Constituent (donor), person or non-person

## SEARCHING FOR MULTIPLE RECORDS

A complete search must be done before entering a new person or non-person in LancerPoint. There should only be one record for each entity. Any entities that are in LancerPoint more than once must go through the duplicate record clean-up process also known as “duplicate PIDM” (person identification management) process.

Common Search forms include:

- SPAIDEN- Name search
- GOAMTCH – Common Matching Entry
- SOIADEN – General Person search
- SOACOMP – Non-person search
- GUIALTI – SSN/SIN Alternate ID search
- ROAIDEN – Person Name/ID Search
- ROIASIQ – Applicant Status Inquiry

## HOW TO DO A COMPLETE SEARCH

Search on any portion of the name or ID that is known. Remember that names in LancerPoint are case sensitive.

- Use the “soundex” feature if you are not sure of the spelling (sounds like)
- Use a “wildcard” search (% or \_ plus part of the spelling of the name then % or \_)
- This precaution may take a few minutes to perform, whereas fixing a duplicate record may take several weeks to complete.

## NAME CHANGE POLICIES

Common sense must be used to determine what constitutes a name correction (i.e. data entry spelling error) rather than a name change. In a name correction, the current name should be “typed-over”. No previous or alternative name record is kept and no documentation is required. The following chart summarizes policies and procedures for making name changes for person and non-person entities in LancerPoint.

Use the System Identification Form (GUASYST) to determine the department that ‘owns’ the record.

Person/Non-Person	Procedures
Employee (faculty or staff) whether or not any other record type exists	<p>Human Resources will make the change.</p> <p>Use Employee Address/Emergency Update Form and require the following:</p> <ul style="list-style-type: none"> <li>▪ New Social Security Card</li> </ul> <p>See Employee Address/Emergency Update Form for procedures</p>
Current Student excluding faculty or staff (should follow “Employee” guidelines above)	<p>Admissions &amp; Records or Financial Aid may make changes. Use Employee Address/Emergency Update Form and require one of the following:</p> <ul style="list-style-type: none"> <li>▪ New Social Security Card</li> <li>▪ Marriage Certificate/License</li> <li>▪ Court Order Document</li> <li>▪ Driver’s License</li> <li>▪ Passport</li> </ul> <p>See Employee Address/Emergency Update Form for procedures</p>

Person/Non-Person	Procedures
Current student employee	Human Resources will make the change.  Use Employee Address/Emergency Update Form and require the following: <ul style="list-style-type: none"> <li>▪ New Social Security Card</li> </ul> See Employee Address/Emergency Update Form for procedures
Business Services	Accounting will make change if no other record exists for vendor
Admission recruit or applicant, not a current student or employee <b>(not available yet)</b>	Change upon request of individual
Alumni & donors, not a current student or employee	Foundation will make change upon request of alumni and donors
Financial Aid recipient	Follow current student and current student employee procedures along with making changes to ISIR Record
Third Party	Change upon request of individual or company

## DUPLICATE PIDMS MANAGEMENT

Numerous times per academic year (e.g., prior to rolling classes into academic history), the MIS and A&R offices will initiate an audit of general person and general student records, to search for duplicate records. The results will identify the existing possible duplicate records (e.g., Location Management, Recruiting, Admissions, Academic History, Billing, Payroll, etc). Based on the results of the audit, the concerned offices will meet to resolve the problem, by following the necessary procedure to combine the duplicates into one record for the student or person.

**An audit report of name changes will be run weekly by Human Resources, Payroll, Student Account Services, A&R, and Accounting to reconcile name change activity and documentation. If a name change has been made that requires additional documentation, it is the concerned department's responsibility to follow up with the department implementing the change and/or the person whose name has been changed, as appropriate.** ITS hosts weekly duplicate PIDM meetings to identify "dups". If you find a duplicate PIDM, please email [duplicate@pasadena.edu](mailto:duplicate@pasadena.edu) to report it. It will be addressed at the weekly meeting.

## **NAMES**

### ***Standards for Adding a New Record***

Enter the Last, first and middle names of the person. The person's legal name is as it appears on a court order, social security card, marriage license, or passport. If legal documentation is not available when the person record is created, enter the full name, including the full middle name. Do not change a full name to an initial. Always use mixed case letters for names. One exception is Human Resources. HR must always use the legal name when creating a person. We realize many names come in from the student applying to the college or financial aid and we do not have the chance to check the spelling. This is okay. Common Matching will help address these errors.

The entry of the Social Security Number (SSN), Date of Birth, Gender and Address is not mandatory. However, these fields are used during the Common Matching process and entry of this data will greatly reduce the possibility of multiple PIDM records in LancerPoint. Furthermore, the SSN and Date of Birth are used extensively in Human Resources and Financial Aid.

If you are manually entering data, please follow these rules:

#### ***Case***

If the person has submitted paperwork with their name written in all upper-case letters, enter the name with mixed case letters. If the person's name starts with a lower-case letter, enter the first letter in lower case (duBois, for example). When in doubt of the correct format to enter, request legal documentation from the person.

#### ***Initials***

Do not use an initial for the first name unless the name appears as such on legal name documentation. Do not enter periods in a name unless the person indicates that they are required. In an empty first or last name field, use a hyphen. When in doubt of the correct format to enter, request legal documentation from the person.

#### ***Spaces***

Spaces are permitted if the legal spelling and format of the name includes spaces. When in doubt of the correct format to enter, request legal documentation from the person.

Examples:

- L Christine Johnson
- Mc Donald Van Husen
- McDonald De La Rosa
- Mac Pherson De La Rosa
- St John Van der Linden
- Cooper-Smith Anderson



## ***Punctuation***

- Use hyphens for a non-existent First or Last name
- Use hyphens, apostrophes, dashes or periods **exactly as the person indicates** in writing or on the legal documentation
- Use hyphens to separate double names (sometimes used by persons who wish to use two last names), when indicated by the person that a hyphen is part of the legal spelling of their name
- Use apostrophes (') when the symbol is part of the proper, legal name or address, (e.g., O'Leary, O'Connor, Sam's Wholesale Club)
- Never use commas, pound signs (#), or ampersands (&) in a name

Do not add punctuation where there is none. When in doubt of the correct format to enter, request legal documentation from the person. In the following examples, any could be correct:

Examples:

O'Donnell, Odonnell  
Dell'Acqua, DellAcqua, Dellacqua  
Jones-Smith  
Al-Hassan, AlHassan, al-Hassan, alHassan, al Hassan  
St Denis, StDenis, St-Denis SaintDenis, Saint-Denis, Saint Denis

## ***Previous Names***

With the exception of corrections made due to data entry errors, it is our policy to maintain previous name information in LancerPoint. Forms used by some offices may ask for a person's previous name or names (for example, admission applicants). Enter the earliest name first. Previous name will appear in the previous identification block.

Example:

Name:	Lee Livingstone
Previous Name:	Lee Stanley
Enter previous name	'Lee Stanley' and save.
Enter current name	'Lee Livingstone' and save.

## ***Legal Name***

The Legal Name field is used by PCC. This field should be completed only if the Last Name, Middle Name and First Name are not the person's legal name. Examples of this may be where the person has changed their name but has not yet received legal documentation (court order, SSN, marriage certificate, etc.). Follow all of the previously mentioned data standards when entering data into this field. An Employee's active name must always be their legal name. Preferred name values will display in the schedule of classes for instructors, in the staff directory and in email where name appears.

## ***Social Security Name***

In order to use a different name than the one appearing on the Identification Form for the W-2 Employee Name, then complete the fields in the Social Security Name block on the U.S Regulatory Information window of the Employee Form (PEAEMPL). If a name is not specified in this field, then the name that prints on the W-2 (and all other W-2 reporting) will be taken from the Identification Form (PPAIDEN/SPAIDEN).

## ***Last Name***

The Last Name is a required field. When in doubt of the correct last name format, request legal documentation from the person

- Enter the legal spelling and format of the last name, using standard capitalization rules
- Do not enter titles, prefixes (Dr, Mr, Mrs) or suffixes (III, Jr) in this field; this information is stored in the prefix and suffix fields
- If the individual has no last name, insert a hyphen

## ***First Name***

The First Name is a required field. When in doubt of the correct first name format, request legal documentation from the person.

- Enter the legal spelling and format of the first name, using standard capitalization rules. If there is no first name, enter a hyphen (-) to satisfy the required field
- Spaces and hyphens may be included in double first names (e.g., Mary Ann, Bobbie Jo). Enter both names in the first name field only if it is legally a two-name first name
- If the person prefers to be addressed using both first and middle names, but these are not the legal names, use the **preferred first name field to enter this information**
- Do not include titles, prefixes or suffixes in either the first name or preferred first name fields. This information is stored in the prefix and suffix fields

## ***Preferred First Name***

If a preferred name exists, enter this name (also known as a nickname) in the Preferred First Name field. This is an optional field. Many faculty will desire for a preferred name to appear in the class schedule. Capture the preferred name here.

Examples

William Knight prefers to use the name 'Bill'. Enter 'Bill' in the Preferred First Name field.

D Mark Wilson prefers to use middle name 'Mark'. Enter 'Mark' in the Preferred First Name field.

Alexander James Jones prefers to use the initials 'AJ". Enter 'AJ' in the Preferred First Name field.

Mary Ellen Smith prefers to use her first and middle name. Enter 'Mary Ellen' in the Preferred First Name field.

## ***Middle Name***

The middle name is **not** a required field

- Enter the legal spelling and format of the middle name in mixed case using standard capitalization rules or the capitalized middle initial.
- If the middle initial is used, **it should not be followed by a period.**
- If there is no middle name, leave the field blank.

## ***Prefixes and Suffixes***

Do not enter prefixes and suffixes (such as Mr, Ms, Rev, Jr, IV, or Esq) in the name fields of the current identification block on the LancerPoint IDEN forms. Enter prefixes and suffixes in the respectively named fields on the General Person forms.

### **Name Prefixes**

Enter the name prefixes given by the person. If no prefixes are provided, do not enter any.

Enter the prefix to be associated with the person's name using mixed case and standard capitalization rules.

Mr.  
Mrs.  
Ms.  
Miss  
Dr.  
Rev.  
Brig. General  
Cmdr.  
Col.  
Capt.  
Father  
General  
Honorable  
Judge  
Lt.  
Lt. Col.  
Maj.  
Rabbi  
Sgt.  
Sister  
Bishop

### **Name Suffixes**

- Enter name suffixes given by the person. If no suffixes are provided, do not enter any.
- Enter the suffix code to be associated with the person's name using mixed case and standard capitalization rules.

- The suffix may be up to 20 characters in LancerPoint and multiple suffixes may be entered.
- Separate multiple suffixes with commas.

Jr.  
 Sr.  
 Ph.D.  
 II  
 III  
 IV  
 V  
 VI

### ***Name Type and Description***

The “current” name in LancerPoint does not require a type to be identified. In other words, if there is only one name, it is current and the type can be left blank. If a designation other than current is needed, here are examples of name descriptions to be used:

<b>ADVN</b>	<b>Foundation Name</b>
<b>ALIA</b>	<b>Alias Name</b>
<b>ALUM</b>	<b>Alumni ID</b>
<b>BIRTH</b>	<b>Birth Name</b>
<b>FORM</b>	<b>Previous Name</b>
<b>LEGL</b>	<b>Legal / Official Name</b>
<b>MAID</b>	<b>Maiden Name</b>
<b>SPSE</b>	<b>Spouse (with no record) Name</b>

### ***Non-Person Name***

All information is typed in mixed case format. If an “article” (a, an, or the) is used as an adjective in the full legal name of a non-person entry, it should be included when entering the name in LancerPoint.

Example:

The Boeing Company  
 Kansas Independent College Fund  
 New York State Department of Education  
 United States Postal Service

- Enter company name in the corporation field (on the FTMVEND form) as listed on an invoice or other company document
- Other non-person records that are not Finance Vendors should be entered on SPAIDEN/PPAIDEN in the Non-Person Field. Other sources: the phone book or web site
- Punctuation in the name and address of a company should be entered only when it is part of the official name

- Determine spacing by using the vendor's invoice or other company documents as a guide. Generally, acronyms do not have spaces between the letters, e.g., FOCUS, IBM, AES of Roanoke Inc. Include spaces between initials and the company name, e.g., A B Dick Products Inc or E C Geiger Inc.
- If the official name includes a numeral such as 47th Street Photo, enter the numeral rather than spelling the number out.

### ***Abbreviations in Company Name***

In general, company names should not be abbreviated unless the company has done so, such as IBM. If space limitations require that a name be abbreviated, abbreviate the latter part of the name rather than the former. Reference/update GORNPNM any time a company name needs to be abbreviated or is commonly abbreviated.

### ***Before adding a new company to LancerPoint***

It is important that SOAIDEN and SOACOMP be searched thoroughly to ensure that the company does not already exist in the vendor or other non-person files. If a company already exists, use the appropriate maintenance form to activate in the applicable module. If required, add an additional address type and address particular to the department.

Only one company record and company identifier, with multiple addresses and types as required, should exist for each business unit. Where large corporations operate under different business units with independent tax identification numbers, only then should the business units be established as separate entities with separate identifiers.

**~~The only exception to this rule is the Financial Aid FFELP Lenders, Guarantors and Service Agents. In order to process CommonLine Loans within LancerPoint, the appropriate NCHELP name and code are required. If that same entity exists for purposes other than CommonLine Loans, a second record is appropriate as separate business units exist.~~**

For example

- All area Wal-Mart stores, K-Mart stores, etc. would be a single company with one identifier and multiple business addresses
- Nationally affiliated moving companies, such as North American Van Lines, would be a single company with one identifier and multiple addresses containing the name of the individual agent, because these are all centrally billed under the parent company
- General Electric Aerospace, General Electric Medical Systems, and General Electric Credit Corporation would all be separate companies with separate identifiers since they operate as separate business units even though they are the same parent corporation
- An example of when a non-person may exist more than once is when Bank of America is a vendor but is also a FFELP lender. The Vendor ID will be generated whereas the FFELP lender ID will be specified by the Federal Government

# ADDRESSES

## General

Institution-wide processes are critical for shared data such as addresses; we should be mindful of the purposes for which the data are entered. For example, departments with marketing responsibility (such as Foundation and Pathways) must be able to produce individualized correspondence conforming to address rules. Departments such as Business Services and Purchasing may have less stringent formatting requirements. These standards must balance three considerations:

- LancerPoint system requirements;
  - ✓ US Addresses - Street line 1, City, State, and Zip Code
  - ✓ International Addresses – Street line 1, City, and Nation
- Accepted standards for formal communications;
- U.S. Postal Service guidelines.

All addresses must meet U.S. Postal Service addressing requirements. The guidelines expressed herein are designed to convey the minimum standard requirements to be used throughout PCC.

## Address Types

The following address types are available for use based on the Address Type Code Validation (STVATYP) form.

Address Type	Description
AL	Alumni
BU	Business
ER	Emergency Contact
LO	Local Address
MA	Mailing
PR	Permanent
W2	HR W2 Address
WK	Work Address
XX	Reserved for TGRFEED Use Only

It is our desire to maintain a standardized list of address types based on their purposes, rather than separate addresses for each department as this will reduce redundant data entry. Thus, an individual may appear in accounting, be an alumnus, employee and a current student, and only have a single address. The Foundation Office can put a “preferred indicator” on any address type in the Alumni module. This indicator cannot be viewed in any module except Alumni.

Each LancerPoint application (e.g., recruitment mail, billing, grades, award letters, and gift solicitations) will look for a valid address in a prescribed sequence. For example, the

grade mailing routine might look for addresses in this order: MA and then PR. Admission might typically search for a mailing address in this order: PR and then MA.

Identical addresses should not be keyed in as different address types. The address types and descriptions as approved are listed below. Note that the use made of a particular address type is really part of its definition.

### **AL - Alumni**

Address for Donors. Alumni with records in the system should have their existing MA address updated rather than an AL address created.

### **BU - Business Address**

The Business address (non-person) is the address to which purchase orders and other business correspondence is directed, and generally reflects the physical location of the vendor. This is the primary address type for storing vendor addresses in LancerPoint, and all entities established in LancerPoint initially as a vendor should have a BU address. Multiple business addresses may be stored for each vendor, using sequence numbers in conjunction with the BU (business address) designator.

### **ER - Emergency Contact**

Emergency contact information about students or employees may be entered on the emergency contact tab of the General Person Identification (SPAIDEN/PPAIDEN) form. While the emergency contact information does not require an address type because the data is not stored in the regular address file, the address can be associated with one of the addresses entered on the general person record (e.g., if an ER address type record was entered on the general person record). In the event of an emergency and no emergency contact information is available; attempts will be made to contact persons at the MA address or other addresses.

### **LO – Local Address**

The local address is the address to be used to capture the local address of international students only. An international student's home nation address should be their PR address.

### **MA- Student's mailing address if different than PR address**

This is the default address for PCC. MA is required for all person records.

### **PR – Permanent Address**

- The permanent address is the address that changes rarely for a person. In the case of a student, this may be a post office box or a parent address.

### **W2 – W2 Address**

This address is only for use by HR.

### **WK – Work Address**

The work address of the person when different from the PR or MA address type.

## **XX – Reserved for TGRFEED Use Only**

The address type reserved for Finance operations only.

### ***US Street Standards***

All information is typed in mixed case format (e.g., not all caps or all lower). Street names should be spelled out in their entirety whenever possible.

Note that the post office reads an address from the bottom up. Thus, the most general information (country, state or province) is at the bottom of the address, while the most specific (apartment or room number) is at the top.

### ***Punctuation & Symbols***

- Punctuation (periods, commas and apostrophes) should not be used. Symbols should never be used in the first position of an address field.
- The percent symbol "%" should never be used.
- The designation for "in care of" should be abbreviated as "c/o" when necessary and should be entered on the first street address line.
- Although USPS standards prefer uppercase letters for the presentation of all lines of the address block, address data should be entered in mixed case using standard capitalization rules.
- Use hyphens and slashes in addresses when needed for clarity or designated fractions.

Example:

Mid-Island Plaza  
101 1/2 Main St

- Use the Ampersand '&' instead of the word 'and' only if that is the proper spelling or if it is used on individual or business letterhead.

Example:

1500 King & Queen Way

The standard layout for the Delivery Line is:

primary address number	numerical, not word
predilection	N (North), E (East), SW (Southwest)
street name	normally not abbreviated
suffix	St, Dr, Cir
postdirectional	N (North), E (East), SW (Southwest)
secondary address identifier	Apt, Rm, Ste
secondary number	numerical, not word

The USPS prefers use of pre-direction and post-direction abbreviations without a period. These describe the geographic direction before and after the street name. Directionals should be spelled out only when they are part of the street name.

Example:



1501 Southwest Freeway  
101 West St  
202 County Road NE  
303 Bay West Dr  
500 Bay Drive W

The preferred delivery line for Rural Route designations is RR.

Example:

RR 2 Box 18

### ***Compass Directions***

If appropriate, compass directional words may be abbreviated at the beginning and/or end of the street name.

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

### ***Abbreviations for Street Designators***

Refer to the U.S. Postal Service Address Standards publication for abbreviations of designators not listed below. Abbreviations for Street Designators are defined by the USPS.

Avenue	Ave
Boulevard	Blvd
Branch	Br
Center	Ctr
Court	Ct
Circle	Cir
Drive	Dr
Estate	Est
Highway	Hwy
Lane	Ln
Parkway	Pkwy
Place	Pl
Road	Rd
Square	Sq
Station	Sta
Street	St

## ***Address Unit Designators***

Secondary designators, such as suite or apartment numbers, should be on the same line as the street address and at the end to the right.

Example:

1356 S Executive Dr Ste 202  
1624 W Donner St Apt 101  
102 Main St Apt 101  
102 Main St Ste 101  
102 Main St Rm101

If the primary address uses all available characters, the secondary unit designator should be on the first address line – preceding the primary address. The unit designator should never be on the line following the primary address. Remember, the post office reads an address from the bottom up.

Example:

Mr. Michael Murray  
Apt C  
5800 Springfield Gardens Cir  
Springfield VA 22152-1058

Always use the USPS standard abbreviations for secondary unit designators as follows:

Secondary Unit Designator	Approved Abbreviation
Apartment	Apt (no #)
Basement	Bsmt *
Building	Bldg
Department	Dept
Floor	Fl
Front	Frnt *
Hangar	Hngr
Lobby	Lbby *
Lot	Lot
Lower	Lowr *
Office	Ofc *
Penthouse	Ph *
Pier	Pier
Rear	Rear *
Room	Rm
Side	Side *
Slip	Slip (Boat)
Space	Spc
Stop	Stop
Suite	Ste
Trailer	Trlr
Unit	Unit

Secondary Unit Designator      Approved Abbreviation  
Upper                                      Uppr \*

\* Does not require secondary range number to follow

### ***Attention Line***

If possible, avoid using an attention or “care of” line. Reorganizations or turnover can make them obsolete quickly. The designation for “in care of” should be abbreviated as “c/o” when necessary and should be entered on the first street address line.

If an attention line is necessary, try to use only an office or title rather than a name. Thus, “Attention: Treasurer” is preferable to “Attention: Joseph Deters, Treasurer” because the former does not become obsolete when a new treasurer is elected.

If an attention line is necessary, enter the address as provided by the company or organization.

### ***PO Box***

- Always abbreviate Post Office Box as PO Box
- Change “Caller”, “Lockbox” and “Drawer” to PO Box (Clean Address will help w/ this)
- Dual Addresses
- LancerPoint address formats allow three lines of street address information. If a mailing file contains both a physical address (street number and name) and delivery address (PO Box), place the PO Box immediately above the last line.
- Do not enter data into the second address line until data has been entered into the first address line.

Example:

Mr. John Doe  
1201 Broad St  
PO Box 1001  
Falls Church VA 22042-2102

### ***Sources for Additional Information***

There are style manuals that deal with formal addressing style. There are several U.S. Postal Service publications dealing with addressing. The most comprehensive and accessible publication is Postal Addressing Standards, Publication 28. This publication is available from the U.S. Postal Service as well as in a portable document format (PDF) on the World Wide Web at:

<http://pe.usps.gov/cpim/ftp/pubs/pub28/pub28.pdf>

The U.S. Postal Service National Customer Support Center has a very useful web site that provides extensive address and zip code information:

<http://www.usps.gov/ncsc/>

## **City**

- All information is typed in mixed case format, (i.e. not all caps or all lower). Spell out city names in their entirety. If it is necessary to abbreviate city names to fit within 20 characters, use abbreviation standards described herein or in the US Postal Service Postal Addressing Standards (System generated from zip code entry).
- State and Province
- State codes MUST be entered for all U.S. Canadian, and Australian addresses. The appropriate code may be selected using LancerPoint software (drop down menu). For additional information, refer to the Postal Service Address Standards publication. The State and Province values are validated based on the State/Province Code Validation (STVSTAT) form.

Canadian Provinces are entered in the State/Province field, NOT in the City field.

Note: Canadian addresses must include the city in the City Field and the Province in the State Field.

## **Zip or Postal Code**

Zip or postal codes MUST be entered for all U.S. and Canadian addresses. For all US addresses, enter the five-digit zip code before entering the city, county, or state.

### **United States**

A Hyphen must be entered when the entire 9 digit (zip plus four) zip code is available. If the last four digits are unavailable, enter the first five digits in the first five positions of the field without the hyphen.

Example:

97203

97203-5798

### **Canadian**

Enter the six-character postal code by keying in 3 characters, a space, and the last 3 characters.

Examples:

T2T 2Y5

R2L 1N4

## **Country**

A country code is required for all non-U.S. addresses. Do not enter "United States" in the country name field for United States addresses. LancerPoint maintains a list of all the current code options available and the default country designation is "US"

## **International Addresses**

International State and Provinces (excluding Canada) are entered in the City field, NOT in the State/Province field. The State field should be blank for all International addresses other than Canada or Australia.

Use the Nation validation values to enter nation or country codes. This way PCC can better control the printing of international addresses on letters and forms.

International information is typed in mixed case format, (e.g., not all caps or all lower). Enter city name, province or state and postal code. It may not always be possible to enter city, province/state and postal code in the 20-characters of the city field. This field is required and the individual must use best judgment in how to employ the City field and address lines to best replicate the international address. Spell out names in their entirety. If it is necessary to abbreviate city names to fit within 20 characters, use abbreviation standards.

Enter street address information in the 3 street address lines and enter the city and province (or equivalent) in the city field. (For Canadian addresses, enter the province in the state/prov field.) Finally, enter the postal code (if any) in the ZIP code field.

Example:

Street address	Petko Metodiev Kitanov POB 140
City	Balgoevgrad, Hyderabad
ZIP Code	2700
Nation	BU

## ***Military Address***

### **Overseas Locations**

- Enter the APO or FPO code into the City field.
- Enter the military 'state' code (AA, AE, or AP) into the State field.
  - AA for units in the Americas - other than CANADA
  - AE for mail going to Europe, the Middle East, Africa, and Canada
  - AP for mail destined to the Pacific

Examples:

SSGT Dennis Becker  
Unit 2050 Box 4190  
APO AP 96522-1215

Sgt Cher Downey  
PSC 802 Box 2625  
APO AE 09777-0010

Seaman Duane Reeves  
B Division  
USS North Dakota  
FPO AA 34093-2344

## Domestic Locations

All domestic military mail must have a regular street style address.

Example:

Col Margaret Henry  
Lowery Air Force Base  
8205 E Sixth Ave Apt 405  
Denver CO 80234

## Address Source

The following table describes address source codes defined for the LancerPoint system.

EDI	Electronic Data Interchange
POST	Post Office change
WEB	Web Address Update

## Adding a New Address Type

The following guidelines should be observed if a new address type should be needed:

Department	Only the following departments can add and/or change an address type
Student	Student Account Services A&R Financial Aid
Faculty/Staff/Hourly	Human Resources
Alumni	Foundation
Non-Person (Vendors)	Foundation Accounting Financial Aid

## TELEPHONE NUMBERS

An entity (person or non-person) may have multiple telephone numbers within the LancerPoint system. Telephone numbers should be accurate and reflect the most recent data received. Enter the ten-digit number without inserting a hyphen.

Telephone numbers may be tied or linked to a specific address. The 'Address Type' and 'Seq No' fields are used to link the telephone number to a specific address. It is possible to have more than one telephone number for a single address.

## Telephone Numbers

All regional and local telephone numbers, including on-campus phone numbers, need to be entered using the ten-digit format. Enter all three parts in the appropriate field, using no parentheses or hyphens. Do NOT enter the standard "1" code for long distance dialing.

Example:

3162955000

## ***International Numbers***

There is a 16 character limit in the international phone number field. Enter all three parts in the appropriate international phone number field, using no parentheses or hyphens. Do NOT enter the "011" standard code for international dialing.

Example:

81037599311 The number would be entered for a telephone number in Japan consisting of 81 for the country code, 03 for the city code and 7599311 for the phone number.

## ***Phone Number 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  
1764

All regional and local telephone numbers, including on-campus phone numbers, need to be entered using the ten-digit format.

## ***Telephone Types***

A telephone type distinguishes each telephone number entered in the LancerPoint system. PCC uses the following codes:

AL	Alumni
BU	Business
CELL	Mobile
ER	Emergency Contact
FAX	Fax
LO	Local Phone
MA	Mailing
PC	Pasadena Campus (Staff Directory)
PR	Permanent Residence Phone
WK	Work Phone

Multiple phone numbers may be stored for each mailing type, using sequence numbers.

## **E-MAIL**

Students, faculty and staff at PCC are eligible to receive internet access and e-mail services. Use of these privileges requires establishing an account with PCC's Information Services. Registered students automatically receive a username and password which includes a Institution specific e-mail address.

All e-mail addresses entered should be evaluated for case sensitivity and spelling. Some e-mail systems are case sensitive before the @. E-mail addresses consist of a login

name followed by the @ sign, followed by the domain name. A domain name contains between two and four elements separated by periods.

#### E-Mail Address Types

- BUS Business E-Mail
  - Used for vendor or alumni e-mail address
- INST Campus email
  - Used for Institution-assigned email address
- PERS Personal email
  - Used for student, staff, or faculty email address that is different than the CAMP or BUS email type.
  - This email address type is most commonly used when electronically loading New records from an external source or updating existing records from an electronic load.
- WORK Personal Work E-Mail
- FB Facebook
- TW Twitter

Examples:

helpdesk@pasadena.edu  
alumni@pasadena.edu

## CALENDAR DATES

Dates are entered on a variety of screens for various purposes. PCC prints dates in the format dd-mmm-yyyy. Dates may be entered in any format. The system will re-display the date in the dd-mmm-yyyy format.

Examples:

Date Entered As	Date Displayed
January 17, 1999	17-JAN-1999
4/17/99	17-APR-1999
060899	08-JUN-1999
06	06-current month-current year
0602	06-FEB-current year

## GENDER

The U.S. Department of Education requires that PCC reports gender information.

- Male A male person, man or boy
- Female A female person, woman or girl
- Not Available The gender information is not available or if the gender cannot be determined by the name, e.g., Chris, Pat, Terry, etc.



## SOCIAL SECURITY NUMBER

- Enter the entire (nine) 9-digit number, omitting dashes and spaces between numbers (e.g. 555491133).
- A SSN is not required for international students, unless the student is employed at PCC.
- Changes to Social Security Number
  - A person making a social security number change request must present a new social security number card. Good professional judgment should be used when making error corrections to Social Security Numbers. The following guidelines should be observed if a change must be made to the Social Security Number.

Student	Admission & Records Financial Aid
Faculty/Staff/Hourly	Human Resources
Alumni	Foundation
Non-Person (Vendors)	Foundation Business Services

## DATE OF BIRTH

### *Date of Birth*

The Date of Birth is required for employees and students.

### *Changes to Date of Birth*

An employee or student making a date of birth change request must present a birth certificate.

Student	Admissions & Records Financial Aid
Faculty/Staff/Hourly	Human Resources
Alumni	Foundation
Non-Person (Vendors)	Foundation Business Services

## **MARITAL CODE**

This information may be collected for students, employees and constituents of PCC.

D	Divorced
M	Married
N	Not Known
P	Separated
S	Single
W	Widowed

## **ETHNICITY CODE**

This field **MUST** be entered for students and employees who are U.S. citizens or U.S. permanent residents. This field **MUST NOT** be entered for international students or employees (non-U.S. citizens residing in the U.S. on a visa). This field is optional for constituents who are friends of PCC.

A	Asian
AC	Chinese
AI	Asian Indian
AJ	Asian Japanese
AK	Korean
AL	Laotian
AM	Cambodian
AV	Vietnamese
AX	Other Asian
B	Black Non-Hispanic
F	Filipino
H	Hispanic
HM	Mexican//Mex-American/Chicano
HR	Central American
HS	South American
HX	Other Hispanic
N	American Indian/Alaskan
O	Other Non-White
P	Pacific Islander
PG	Guamanian
PH	Hawaiian
PS	Samoan
PX	Other Pacific Islander
W	White Non-Hispanic
X	Unknown
XD	Declined to State

For international students or employees (non-U.S. citizens residing in the U.S. on a visa), leave this field **BLANK**.

## **OTHER PERSON DATA**

### ***U.S. Citizen Type***

If the person is a prospect, student or employee, this information is required. If the person is a constituent and not a student or employee, this field may be left blank to indicate the U.S. citizenship is not known.

### ***Veteran File Number***

The Office of the Registrar keeps and maintains this information for students.

### ***Religion Code***

PCC will not collect and/or maintain religion data if known and needed.

### ***Driver's License Information***

Driver's License data is not maintained on a commonly accessible form. Human Resources will collect/maintain driver's license information for driving Institution vehicles.

### ***Confidential Records***

Confidential Information Indicator

If a person completes a "Request to Withhold Information" form then no data about the student will be shared with any person other than the student without expressed written permission from the student. The permission must be obtained in writing and identify the person(s) who are allowed access to the record and the type of information that may be shared (registration, grades, financial aid, etc.)

This confidentiality does not apply internally where information is needed for daily Institution business purposes.

### ***Deceased Information***

- Due to the sensitivity of this issue, prompt attention is important so future mailings from Institution offices are discontinued. Deceased status must be verified information, not just perceived information.
- For employees of PCC, ONLY the Human Resource department will enter and change this information based on prevailing policies.
- For constituents (who are not students or employees), HR will enter and change this information based on prevailing policies.
- For Students, only the A&R Office will enter/change deceased information.

## **DISCLOSURE OF STUDENT INFORMATION**

### ***Family Educational Rights and Privacy Act***

The following are college policies relating to the Family Educational Rights and Privacy Act of 1974, Public Law P.L. 93-380, and Chapter 816, Statutes of 1975, State of California.

**I. Definition of Education Records**

Education records consist of those files maintained by the following offices: Admissions and Records, Placement, Financial Aid, Health Services, and those files maintained for individual students by academic departments.

**II. Access to Education Records**

All students have the right to inspect and review their records. A student who follows the established procedure of the Records Office shall be granted access to his or her records within 15 days of the request. Expressly **exempted from the right of review and inspection** are the following materials:

- A. Financial records of the parents of the students.
- B. Confidential letters and statements of recommendation which were placed in the education records prior to Jan. 1, 1975.
- C. Records of instructional, supervisory, counseling and administrative personnel which are in their sole possession and are not accessible or revealed to any other person except a teacher substituting for the one in sole possession.
- D. Records of students made and maintained by the College Health Center and the Learning Disabilities Center, which are used in the treatment of students and which are not available to persons other than those providing such treatment; except that such records can be reviewed by an appropriate professional of the student's choice.

**III. Procedure for a Student's Access to Records**

- . A student may review his or her records upon appropriate identification and in conference with a College Counselor or other certificated Student Services staff member.
- A. A former student may request in writing a review of his or her records. The request should be directed to the Associate Dean of Admissions and Records who is the designated "Records Officer" acting for the president of the college. C. Any student request for review shall be granted no more than 15 days following the request.

**IV. Procedure for Challenge of Accuracy or Content of Education Records**

- . Informal

A student may file with the Associate Dean of Admissions and Records a "Student Petition" which challenges the accuracy or content of education records maintained by the college. The Student Petition should be supported with documentation. The Petition Committee will rule on the request and notify the student. The student not satisfied with

the decision may discuss the matter with the Vice President of Student and Learning Services who may make a determination.

A. Formal

If the student is not satisfied with the determination made by the Vice President of Student and Learning Services, the student may, within 30 days, appeal the decision in writing to the president of the college.

V. **Release of Education Records Information**

. Any release of a student's education records, with the exceptions listed, must be with the student's written consent or request.

A. Directory information — In accordance with the Federal Family Educational Rights and Privacy Act of 1974, the California Education Code and Title V of the California Administrative Code, Pasadena City College will make available upon request certain "directory information" when appropriate. This information consists of the following: A student's name; city of residence; major field of study; participation in officially recognized activities and sports; if member of an athletic team, weight, height and age; dates of enrollment; degree and awards received and the most recent previous educational institution attended by the student. Any student desiring to withhold "directory information" may file a written request with the Associate Dean of Admissions and Records, room L113, at least five working days in advance of the effective date.

B. Without the student's written consent and upon authorization of the Associate Dean of Admissions and Records or his/her designee, the college may release copies of, or otherwise divulge, material in student education records to the following agencies and individuals who are expressly forbidden from permitting access of said education records to third parties:

1. College and District staff with a need to know. Authorized representatives of the Comptroller General of the United States, the Secretary of Education, an administrative head of an education agency, state education officials, or their respective designees of the United States Office of Civil Rights, where such information is necessary to audit or evaluate a state or federally supported education program or pursuant to a federal or state law provided that, except when collection of personally identifiable information is specifically authorized by federal law, any data collected by such officials shall be protected in a manner which will not permit the personal identification of students or their parents by other than those officials, and such personally identifiable data shall be

destroyed when no longer needed for such audit, evaluation and enforcement of federal legal requirements.

2. Other state and local officials or authorities to the extent that information is specifically required to be reported pursuant to state law adopted prior to Nov. 19, 1974.
3. Officials of other public or private schools or school systems, including local county, or state correctional facilities where educational programs are provided, where the student seeks or intends to enroll, or is directed to enroll, subject to the rights of students as provided in Section 76225 of the Education Code.
4. Agencies or organizations in connection with a student's application for, or receipt of, financial aid; provided that information permitting the personal identification of students may be disclosed only as may be necessary for such purposes as to determine the eligibility of the student for financial aid, to determine the amount of the financial aid, to determine the conditions which will be imposed regarding the financial aid, or to enforce the terms or conditions of the financial aid.
5. Accrediting organizations in order to carry out their accrediting functions.
6. Organizations conducting studies for, or on behalf of, educational agencies or institutions for the purpose of developing, validating, or administering predictive tests, administering student aid programs and improving instruction, if such studies are conducted in such a manner as will not permit the personal identification of students or their parents by persons other than representatives of such organizations and such information will be destroyed when no longer needed for the purpose for which it is collected.
7. Appropriate persons in connection with an emergency if the knowledge of such information is necessary to protect the health or safety of a student or other persons, or subject to such regulations as may be issued by the Secretary of Education.
8. Those who have obtained a subpoena or judicial order. The student is to be given notice by mail of the college's compliance with the order

#### VI. **Record of Access**

The college will maintain an access list which includes the identity of persons who have

requested and have been denied or who have had access to student records, the dates of said requests, and the reasons for such access. The access list is not required of college officials.

VII. **Transfer of Information by Third Parties**

Education records or personal information transferred to a third party will include a notice that such party shall not permit access by any other party without the written consent of the student.

**Notice of Student Rights**

Students will be informed at least annually through the Pasadena City College Catalog and other publications of their rights under the Act.