

Illinois Institute of Technology

Draft 2.3  
**DATA STANDARDS  
MANUAL**

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NOTE: Any changes recommended for the data standards in use at Illinois Institute of Technology must be approved by the Data Standards Committee which consists of representatives from all Banner application areas. Approved changes will be reflected in a subsequent standards manual.

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## 1 Introduction to Banner and Data Standards

Banner is a web-based software application developed by SunGard Higher Education (SGHE) specifically for higher education institutions to use to manage administrative data and business processes. Banner comes in two distinct forms: Internet Native Banner (INB) and Self-Service. Employees in administrative units, administrative staff in academic units, and faculty who have administrative roles will use INB. Everyone (i.e., students, faculty and staff) will use Self-Service Banner. Self-Service is a more user-friendly interface, but it allows only a specific, limited set of processes to be completed.

Data Standards are specific rules for entering data into the various components or “modules” of the Banner system. These standards, which are defined in the remainder of this document, are necessary to maintain data consistency across users and modules. This is important because the data in Banner are shared across modules. For example, all Banner modules use the same general person information, including name, address, telephone number, and email address. Abiding by the data standards presented in this document will:

- Avoid creation of duplicate personal identification master records (or PIDMs) for a single person or non-person entity.
- Provide complete name and address information for a variety of business processes, in a timely manner and with an audit trail of changes.
- Ensure timely delivery of correspondence through the use of United States Postal Service (USPS) recommended mailing address formats and abbreviations.
- Facilitate consistent reports and searches.
- Take advantage of the Banner database and workflow capabilities.

## 2 Confidentiality (FERPA) Guidelines and Responsibilities of IIT Employees

The guidelines set forth below define the responsibilities of everyone accessing and managing data for IIT. Offices may have individual guidelines that supplement, but do not supplant or contradict, the guidelines set forth below. Data entrusted to IIT by other organizations (e.g., testing companies, lenders, and government agencies) is governed by terms and conditions agreed upon with those organizations. Specific issues not governed by such agreed upon terms shall be governed by the guidelines set forth below.

## **2.1 Confidentiality Guidelines**

In accordance with the 1974 Family Education Rights and Privacy Act (FERPA), and to ensure maximum safeguards against indiscriminate distribution of information contained in students' records, only authorized IIT personnel will disclose information of a confidential nature (i.e., information not normally available to the general public). This information may be disclosed only to the student himself or herself, to a parent or guardian claiming that student as a dependent (as demonstrated by providing a copy of the parent or guardian's most recent Federal income tax return), or to a third party upon receipt of a written release signed by the student.

Certain exceptions to this include IIT school officials<sup>1</sup> who have a legitimate educational interest<sup>2</sup> in the records, organizations conducting studies for educational and governmental agencies or offices in connection with the student's application for receipt of financial aid, governmental officials as identified by Public Law 93-380, and an appropriate official in response to a court order or subpoena. Without a signed release, the university can make only "directory information"<sup>3</sup> available for public use in campus directories and publicity of events.

## **2.2 Responsibilities of IIT Employees with Respect to Institutional Data**

Employees must adhere to any applicable Federal and state laws covering storage, retention, use, release, and destruction of data. All department heads are responsible for ensuring that staff members in their department know what these laws require and adhere to these requirements.

Supervising administrators shall ensure a secure office environment with regard to all institutional information systems. Administrators shall validate the access requirements of their staff according to job functions before submitting requests for the provision of data access on behalf of their staff. Except as described in the Confidentiality Guidelines set forth in Section 2.1 above, under no circumstances shall anyone use institutional electronic data (in detail or summary) in any publication, seminar, or professional presentation, or otherwise release data, in any form, outside the university without prior written approval from an appropriate security officer. Data should never be left on any system to which access is not controlled.

Electronic data are owned by the university and are vital assets. All institutional data, whether maintained in the central database or copied into other data systems, including personal computers, remain the property of IIT. Access to data is not approved for use outside an individual's office university responsibilities. Computerized institutional data shall be used only for the legitimate business of IIT. Institutional computing services and facilities shall be used only as required in the performance of job functions.

As a general principle of access, university data (regardless of who collects or maintains it) shall be shared among those employees whose work can be done more effectively by knowledge of such information. Although the university must protect the security and confidentiality of data, the procedures to allow access to data must not unduly interfere with the efficient conduct of

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<sup>1</sup> School officials shall be deemed to include member of the IIT's faculty and administrative staff who have a legitimate educational interest in such records and other personnel whose duties involve establishment and maintenance of such records and development of institutional reports.

<sup>2</sup> A "legitimate educational interest" shall be deemed to mean having a direct involvement in establishing or reviewing a student's academic record or performance.

<sup>3</sup> The following constitutes directory information: name of student, date and place of birth, dates of attendance at IIT, local address, phone number and email address of student, home address and phone number of student, positions held, place of employment, and extension number of students currently employed at IIT, department of specialization and educational level (undergraduate, non-degree-seeking student, graduate student in Master or Ph.D. program), membership in officially recognized campus organizations and on teams, offices held in such organizations, degrees earned and special awards and recognition given, photograph of student.

university business.

All information systems owned by IIT shall be constructed to assure that:

1. Accuracy and completeness of all system contents are maintained during storage and processing.
2. System capabilities can be re-established within an appropriate time after loss or damage by accident, malfunction, breach of security, or natural disaster.
3. Actual or attempted breaches of security can be detected promptly and controlled.

All who use IIT institutional data have the right to expect the data to be accurate.

### **3 Names**

#### **3.1 General Name Information**

Names may be either “person” names (e.g., Mary Smith), or “non-person” names (e.g., Sodexho). Person names are parsed and entered into separate FIRST NAME, MIDDLE NAME, and LAST NAME fields in Banner. Non-person names are entered into the LAST NAME field on most Banner forms, and into the VENDOR NAME field on FTMVEND.

These standards require that offices that collect person names on applications, or any other types of forms, designate separate fields on the form for that person to indicate first name, middle name and last name. This will facilitate our ability to enter a name correctly into the appropriate fields in Banner.

The following forms are used to enter and change name information. The form used depends upon the Banner module in use:

<u>FORM NAME</u>	<u>BANNER MODULE</u>
SPAIDEN	STUDENT
SPAIDEN	FINANCIAL AID
PPAIDEN	HUMAN RESOURCES
FTMVEND	FINANCE ('non-person' vendors)
FOAIDEN	FINANCE ('person' vendors)

Last Name, First Name and Middle Name appear on all of the above forms.

Prefix, Suffix and Preferred First Name appear only on SPAIDEN and PPAIDEN.

The Banner system configuration defaults to the following field length designations for the following fields:

- Person Last Name – maximum length 60 characters
- Person First Name – maximum length 15 characters
- Person Middle Name – maximum length 15 characters
- Non-Person Name – maximum length 60 characters

The university considers the “current name” in Banner as a person’s legal name. A person’s legal name appears on official documents such as a birth certificate, court order, social security card, marriage license or passport. At this time, there is no plan to use the FULL LEGAL NAME field in Banner.

Names for persons and non-persons should have a customer-friendly appearance. The objective is to enter names and addresses with both upper and lowercase letters so that when a name is printed on correspondence, it looks contemporary and professional. Name formats have also been developed to meet postal regulations with the exception that the US Postal Service prefers address to appear using uppercase exclusively. In all other respects, IIT's name and address standards will comply with the US Postal Service (USPS).

### **3.2 General Name Standards**

#### **3.2.1 Case**

In general, use title case (i.e., capitalize only the first letter of each word) when entering either person or non-person names. The exception to this general rule involves non-person names. Enter a non-person name the way it is given on the invoice or in other documents from the non-person entity (e.g., a vendor).

If a person has written his or her name in all upper-case letters, enter the name in title case, i.e., capitalize only the first letter of each word.

<b>IF YOU ARE GIVEN THIS</b>	<b>ENTER THIS</b>
MCGIVNEY	McGivney

If a person has capitalized a second letter, in addition to the first letter, enter the name with both letters capitalized.

<b>IF YOU ARE GIVEN THIS</b>	<b>ENTER THIS</b>
McGivney	McGivney

If the person's or company's name starts with a lower-case letter, enter the first letter in lower case. Note that names beginning in lower case will not be alphabetized correctly. Banner places these names at the end of an alphabetized list.

<b>IF YOU ARE GIVEN THIS</b>	<b>ENTER THIS</b>
el-Gabri	el-Gabri
eVisions	eVisions

For externally obtained data feeds, technical support staff will need to convert the names into an upper- lower-case format based upon these rules.

#### **3.2.2 Spaces within a Name**

Maintain spaces in a name (one space maximum) exactly as reported by the person or non-person entity. Do not insert spaces between portions of a name if the name was not reported with spaces.

IF YOU ARE GIVEN THIS	ENTER THIS		
	FIRST NAME	MIDDLE NAME	LAST NAME
Ludwig Mies van der Rohe	Ludwig		Mies van der Rohe
Robert de LaSalle	Robert		de LaSalle
MaryAnn Johnson	MaryAnn		Johnson
CitiCorp			CitiCorp
J & B Printing			J & B Printing

### 3.2.3 Initials

Enter the full name if it is given. If only an initial is given for the first or last name, enter the initial without a period. If multiple initials are given for a first, middle or last name, enter those initials in the appropriate field with no periods or spaces.

IF YOU ARE GIVEN THIS	ENTER THIS		
	FIRST NAME	MIDDLE NAME	LAST NAME
Pamela A. Humphrey	Pamela	A	Humphrey
Leslie M. F. Donner	Leslie	MF	Donner
James St. Martin	James	[BLANK]	St Martin
Kalani Jayamini S.K.H.A	Kalani	Jayamini	SKHA
J. F. Kennedy Company			JF Kennedy Company

Sequential letters that are not initials, should be entered without spaces between the letters.

IF YOU ARE GIVEN THIS	ENTER THIS
ABC Company	ABC Company
AVI Audiovisual, Inc.	AVI Audiovisual Inc

### 3.2.4 Abbreviations

Spell out the full name if space permits. **Never abbreviate a person's name.** Use acronyms only if these are part of the non-person name as given (e.g., IBM, AT&T), or if space does not permit entry of the full name. Do not automatically abbreviate such items as "Company," "Incorporated," or "Corporation" unless these are abbreviated by the information provider. If it is necessary to abbreviate part of the name, refer to Appendix G, "Business Word Abbreviations" in United States Postal Service Publication 28, at the following URL:

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

Do not use periods after abbreviations. This is because some forms in Banner will display whatever is stored in the name field, followed by a period. If a period is entered in a name field, then you will see two periods on the Banner form.

EXAMPLES OF DATA GIVEN	DATA ENTERED
Wm. Berg, Inc.	Wm Berg Inc
J. F. Kennedy Company	JF Kennedy Company
Advance Visual, Inc.	Advance Visual Inc

### 3.3 Person Name Standards

#### 3.3.1 Persons with an Initial as their First Name

In cases where a single character is given as the first name, followed by a full middle name, place the single character and the middle name in the FIRST NAME field.

IF YOU ARE GIVEN THIS	ENTER THIS		
	FIRST NAME	MIDDLE NAME	LAST NAME
W. Mark Jones	W Mark	[BLANK]	Jones

If you later receive information that the 'W' stands for William, change the name in Banner to:

IF YOU ARE GIVEN THIS	ENTER THIS		
	FIRST NAME	MIDDLE NAME	LAST NAME
W = William	William	Mark	Jones

If the person prefers to be referred to by his or her middle name, enter that name in the Preferred FIRST NAME field.

In cases where two or more initials are given followed by a full last name, and no middle name, enter the initials in the FIRST NAME field, separated by a space.

IF YOU ARE GIVEN THIS	ENTER THIS		
	FIRST NAME	MIDDLE NAME	LAST NAME
K.P. Srinath	KP	[BLANK]	Srinath

#### 3.3.2 Persons With Two or More Given Names

If a person has two or more given names, and has not specified which are considered first versus middle name(s), enter the first two names into the FIRST NAME field and any other names into the MIDDLE NAME field. Note that this problem can be avoided by designing forms that collect first name and middle name in separate, appropriately labeled, fields.

IF YOU ARE GIVEN THIS	ENTER THIS		
	FIRST NAME	MIDDLE NAME	LAST NAME
Anne Marie Susan Smith	Anne Marie	Susan	Smith
Billy Joe Daryl Thomas Miller	Billy Joe	Daryl Thomas	Miller

Upon request, it is acceptable to enter two names in the FIRST NAME field.

IF YOU ARE GIVEN THIS	ENTER THIS		
	FIRST NAME	MIDDLE NAME	LAST NAME
Anne Marie Smith	Anne Marie		Smith
John Paul Jones	John Paul		Jones

If it is not clear how to parse a name into first, middle and last names, enter the first name that is listed into the FIRST NAME field, the last name listed into the LAST NAME field, and all the names listed in between into the MIDDLE NAME field.

### 3.3.3 Persons with One Name

It is common in some countries for persons to have just one name (rather than a first, middle and last name). For persons with only one name, enter the name into the FIRST NAME field and enter NLN (which stands for No Last Name) in all capital letters, and without spaces between the letters, in the FIRST NAME field.

IF YOU ARE GIVEN THIS	ENTER THIS		
	FIRST NAME	MIDDLE NAME	LAST NAME
Cher	Cher	[BLANK]	NLN

### 3.3.4 Long Names

If a person's first, middle or last name is longer than the field allows in Banner, enter as much as you can into the field. The rest will be truncated. Do not omit characters (such as vowels) or otherwise abbreviate the name.

### 3.3.5 Double Last Names

Enter a double last name in the LAST NAME field only. Allow a space between the two last names if the person prefers the space.

IF YOU ARE GIVEN THIS	ENTER THIS		
	FIRST NAME	MIDDLE NAME	LAST NAME
Patricia Susan Dove Bowers	Patricia	Susan	Dove Bowers

### 3.3.6 Punctuation within a Name

Hyphens and apostrophes may be used within a name (i.e. first, middle or last) as long as the hyphen or apostrophe is not preceded or followed by a space.

Do not use periods or commas in any name field. Do not add punctuation where there is none.

IF YOU ARE GIVEN THIS	ENTER THIS		
	FIRST NAME	MIDDLE NAME	LAST NAME
John Patrick O'Donnell	John	Patrick	O'Donnell
Emily N. Dell'Acqua	Emily	N	Dell'Acqua
Lara Shore - Sheppard	Lara	[BLANK]	Shore-Sheppard
Pronab al-Hassan	Pronab		al-Hassan
K.P. Srinath	KP		Srinath

### 3.3.7 Prefixes or Salutations

Salutations, i.e. Dr, Rev, Mr, Mrs, Ms, are considered prefixes and should be entered in the PREFIX field on General Person Forms. Prefixes are to be entered in upper/lower case with no periods.

A prefix is required for all persons defined in Banner if the person's gender is known or if the person has indicated a preferred prefix. Input "Mr" for males or "Ms" for females if no preferred salutation is indicated.

Exceptions can be made if a person requests that no prefix be used.

Case and Punctuation Examples:	
CORRECT	Mr Ms Mrs Miss Dr
INCORRECT	Mr. MR Ms. MS Dr. DR

The following is a list of acceptable prefixes and their abbreviations:

Salutation (Prefix)	Abbreviation
Attorney	Atty
Chancellor	Chan
Chief Executive Officer	CEO
Chief Financial Officer	CFO
Chief Information Officer	CIO
Chief Operating Officer	COO

Salutation (Prefix)	Abbreviation
Director	Dir
Doctor	Dr
Estate of	Estate of
Father	Fr
Governor	Gov
Honorable (The Honorable)	Hon (The Hon)
Judge	Judge
Miss	Miss
Mister	Mr
Mistress	Mrs
Miss or Madame	Ms
President	Pres
Professor	Prof
Rabbi	Rabbi
Representative	Rep
Reverend	Rev
Senator	Sen
Sister	Sr
Trust(ee) of	Do not abbreviate
Vice President	VP

Abbreviations for military ranks appear in the Appendix A of this manual.

### **3.3.8 Suffixes or Professional Status Indicators**

Professional status indicators (i.e. MD, DO, PhD, DVM, ESQ), and generational indicators (e.g., Jr, III) are considered suffixes and should be entered in the SUFFIX field on the General Person forms. Do NOT enter professional status and generational indicators in the LAST NAME field.

Suffixes are to be entered in upper/lower case with no punctuation.

If a professional status indicator is entered in the SUFFIX field, enter the appropriate salutation in the PREFIX field. The following table contains examples of suffixes and their corresponding

prefixes.

SUFFIX	Corresponding PREFIX
DDS	Dr
DO	Dr
Esq	Atty
JD	Atty
MD	Dr
PhD	Dr

The following table contains a list of acceptable suffixes. This list is not exhaustive, but merely indicative. **When a suffix includes both a generation indicator and a professional status indicator, the generational indicator should come first and be separated from the professional status indicator by a space, but no comma.** When a suffix includes more than one professional status indicator, these should also be separated by a space. Do not enter a suffix if one is not reported by the person. **Do not put the word or abbreviation for "Retired" in parentheses.** (See Section 3.4.1 about the use of special symbols.)

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<b>Examples of Acceptable Suffixes</b>			
CDP	II PhD	Jr EdD	RDH
CMA	III	Jr JD	RN
CPA	III DDS	Jr MD	RNCS
CPIM	III DO	Jr PE	RRRT
CRN	III DPM	Jr PhD	Sr
CRNA	III EdD	Jr RN	Sr DDS
DDS	III JD	Jr MD DC	Sr DO
DPM	III PhD	LISW	Sr EdD
DC	IV	SPC	Sr JD
DMD	IV DDS	LPC CRC	Sr MD
EdD	IV DO	LPCC	Sr PE
Esq	IV DPM	LSW	Sr PhD
Emerita	IV EdD	MD	SRA
Emeritus	IV JD	MSD	SSR
II	IV MD	MSW CISW	USA
II DDS	IV PhD	OD	USA Ret
II DO	JD	PA	USAF
II DPM	Jr	PE	USAFR
II EdD	Jr DDS	PhD	USAR
II JD	Jr DO	RCR	USN
II MD	Jr DPM	RD	V
V DDS	V EdD	V MD	VI

### 3.3.9 Previous Names

With the exception of corrections made due to data entry errors it is our policy to maintain previous name information in Banner. Forms used by some university offices ask for a person's previous name or names (for example admission applicants). Enter the earliest name first:

**EXAMPLE:**

**NAME** Lee Livingstone

**PREVIOUS NAME** Lee Stanley

**INSTRUCTIONS** Enter previous name (Lee Stanley) and save.  
Enter current name (Lee Livingstone) and save.

**NOTES** Previous name will appear in the alternate identification block.

### 3.3.10 Preferred First Name

Offices may use the PREFERRED FIRST NAME field in Banner. However the full first name should also be entered in the FIRST NAME field when it is available. Preferred first name is considered “for informational use only.” It is not used in Banner reports supplied with the system but is available for use on any reports or letters generated and maintained by IIT.

FIRST NAME	William	FIRST NAME	D Mark
MIDDLE NAME		MIDDLE NAME	
LAST NAME	Knight	LAST NAME	Williams
PREFERRED FIRST NAME	Bill	PREFERRED FIRST NAME	Mark

### 3.3.11 Full Legal Name

The CURRENT NAME field in Banner is considered the legal name. The PREFERRED FIRST NAME field is used for variations to the legal name. Currently there is no plan to use the FULL LEGAL NAME field in Banner. Therefore DO NOT add delete or modify any data in the FULL LEGAL NAME field.

### 3.4 Non-Person Name Standards

Non-person names are to be typed as given on an invoice or other materials from the non-person entity (such as a catalog) If an article such as “a” “an” or “the” is used as an adjective within the full legal name of a non-person entry it should be included when entering the name in Banner.

IF YOU ARE GIVEN THIS	ENTER THIS
Department of Defense	Department of Defense
Order From Horder	Order From Horder
A Piece of Cake Catering	A Piece of Cake Catering
The Johns Hopkins University	The Johns Hopkins University

#### 3.4.1 Non-Person Names: Special Symbols

In general the use of symbols and punctuation should be avoided due to the problems these cause in moving data between ancillary systems and Banner.

The following punctuation and symbols should NOT be used when entering a person or a non-person name:

Percent	%
Pound sign	#
At sign	@
Parentheses	( )
Comma	,

IF YOU ARE GIVEN THIS	ENTER THIS
W.F. Decorators Inc.	WF Decorators Inc
General Parts #63	General Parts 63
@XI Computer Corporation	At XI Computer Corporation
Levy Restaurants @ US Cellular Field	Levy Restaurants at US Cellular Field
(P)erson (C)orp.	Person Corp
Lenovo (United States) Incorporated	Lenovo United States Incorporated

The ampersand (&), period (.) slash (/) and hyphen (-) may be used as long as there are no spaces before or after these symbols. If omitting the spaces before and after an ampersand (&) makes the text difficult to read, substitute the word "and" in place of the ampersand.

IF YOU ARE GIVEN THIS	ENTER THIS
J & M Printing	J&M Printing
Harcourt & Brace Publishing	Harcourt and Brace Publishing
AT&T	AT&T
Chicago Convention / Tourism Bureau	Chicago Convention/Tourism Bureau
Helsel - Jepperson	Helsel-Jepperson
Amazon.com Credit Plan	Amazon.com Credit Plan
e.Enzyme LLC	e.Enzyme LLC

The apostrophe (') and colon (:) may be used as given in non-person names as long as there is no space before or after the symbol.

IF YOU ARE GIVEN THIS	ENTER THIS
John's Pizza	John's Pizza
Honors Medical Society: Capital	Honors Medical Society:Capital

The dollar sign (\$) may be used in a non-person name and it is permissible to have a blank space precede the dollar sign.

IF YOU ARE GIVEN THIS	ENTER THIS
CINNR 06 JD \$22K	CINNR 06 JD \$22K

### 3.4.2 Non-Person Names: Punctuation

Hyphens and apostrophes may be used in non-person names as long as the hyphen or apostrophe is not preceded or followed by a space.

This is consistent with the person name punctuation standards.

IF YOU ARE GIVEN THIS	ENTER THIS
John's Pizza	John's Pizza
Cole-Parmer Instrument Co.	Cole-Parmer Instrument Co

### 3.4.3 Non-Person Names: Suffixes

Enter in all caps and without periods suffixes such as LLC LLP LPA and CPA when these are part of the non-person name as given by the non-person entity. Omit any commas between the name and the suffix.

IF YOU ARE GIVEN THIS	ENTER THIS
Tru-Blu Industries, LLC	Tru-Blu Industries LLC
Baker & Hostetler, LLP	Baker and Hostetler LLP

### 3.4.4 Non-Person Names: Numbers

If a non-person name is provided with Arabic numerals enter the Arabic numerals as given. Do NOT spell the numbers out in word form. Likewise do not replace the word for a number with the Arabic numeral if this is not how the name is given.

IF YOU ARE GIVEN THIS	ENTER THIS
Source 4 Company	Source 4 Company
4imprint	4imprint
Four Point Products	Four Point Products

### 3.4.5 Non-Person Names: Long Names

Unlike with person names it is permissible to abbreviate a non-person name if the name is too long to fit in the field. When abbreviating a non-person name first abbreviate any common business words in the name (e.g. company incorporated). Next abbreviate words that appear in Appendix G: Business Word Abbreviations of the most current issue of the United States Postal Service's Postal Addressing Standards (available in pdf format at the following URL:)

<http://pe.usps.gov/cpim/ftp/pubs/Pub28/Pub28.pdf>

### 3.5 Name Type

When entering person's name in Banner, it is important to assign a Name Type. The following table contains the Name Types that IIT uses.

Name Type Code	Name Type Code Description
LEGL	Legal Name
PREF	Preferred Name
PREV	Previous Name

### 3.6 Name Input Guidelines

#### 3.6.1 Adding New Name Records

To avoid entering a duplicate record follow the appropriate procedure for NAME and ID search before creating a new person or non-person. This will vary depending on the Banner module being used.

NON-PERSON Name Searches: Use the wild card (%) in front of and behind the name.

Example: Full legal name: The Earle  
SMART ID: EARLE  
Search as: %Earle%

#### 3.6.2 Name Change Policies

Requirements for documenting name changes depend on whether the name belongs to a person or a non-person entity and the status of the person. Therefore the following policy shall be employed for name changes:

Employees whether they are faculty and staff or student employees will direct personal name change requests to Human Resources.

Students who are not employees will direct personal name change requests to Office of the Registrar.

Non-Person Name changes do not require supporting documentation and should be updated by the owner of the record depending on the entity's relationship to the university.

A common name change form should be used and appropriate documentation provided. (See Figure 1.0.) Due to employee name change documentation requirements the General Person form (GUASYST) should be checked before any name change is done. If the person is part of the Human Resources module as an employee a social security card is required as name change documentation.

**Comment [MSOffice1]:** This section will need to be revised based on IIT's policies for changing person and non-person names.

**Comment [LME2]:** Collect existing forms from the Registrar & HR and update this portion.

#### 3.6.3 Change Form

See Figure 1.0.

**3.7 Record of Name Data Standard Change**

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**Placeholder for IIT Name Change Form (Please Print)**

DATE: \_\_\_\_\_ Banner ID: \_\_\_\_\_

SSN: \_\_\_\_\_

Current Name: \_\_\_\_\_

New Name

First: \_\_\_\_\_ Middle \_\_\_\_\_ Last \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Daytime Telephone: \_\_\_\_\_ Email address: \_\_\_\_\_

Statement of Responsibility:

I assume responsibility for the consequences or problems that may occur as a result of this change of my name. There is no intent on my part to defraud Illinois Institute of Technology.

**Students please note:** Future employment verification may require a copy of a social security card to ensure the name and social security number on record match the name and number on the social security card.

Signature: \_\_\_\_\_

Check all that apply: Student  Faculty  Staff  Alum

Please include any other names under which you may have been associated with IIT:

FOR OFFICE USE ONLY

Received by Name: Dept: Date:
Changed by Name: Dept: Date:
Required Documents: Students: Driver's License Social Security Card Marriage License Divorce Degree or other Court Document showing name change Employees: Social Security Card required

Return this form with proper documentation to the appropriate office below.

Employee: Human Resources Main Building 302  
Student (non-employee): Office of the Registrar Main Building 101

## 4 Addresses

### 4.1 General Address Information

University-wide conventions are critical for shared data such as addresses; we should be mindful of the purposes for which the data are entered. For example units with marketing responsibility (such as Institutional Advancement and Admissions) must be able to produce individualized correspondence conforming to formal addressing rules. Units such as the Office of the Registrar and Accounts Payable may have less stringent formatting requirements but should still follow the standards set forth here. These standards must balance four considerations:

1. Banner System Requirements
2. University accepted standards for formal communications
3. U.S. Postal Service guidelines
4. International address requirements

All addresses must meet US Postal Service (USPS) addressing standards (<http://pe.usps.gov/cpim/ftp/pubs/Pub28/Pub28.pdf>). According to the US Postal Service Postal Addressing Standards "A standardized address is one that is fully spelled out abbreviated by using the Postal Service standard abbreviations shown in this publication or as shown in the current Post Service ZIP+4 file." (p. 2). The guidelines expressed herein are designed to convey the minimum standard requirements to be used in order to enhance the processing and delivery of mail reduce instances of undeliverable mail and position the university to obtain the most advantageous postal rates.

Although data may be reformatted on output it is our intention that addresses be entered exactly as these will print on correspondence reports and other documents. Therefore the following address data entry standards are recommended.

### 4.2 General Address Standards

#### 4.2.1 Case

All address information is to be entered in title case format i.e. the first letter of each word is capitalized. The exception is nation. Nation for international addresses must be expressed in all upper case. (See section 4.5.) Note that this is a departure from the USPS Postal Addressing Standards as set forth in USPS Publication 28 which recommends that uppercase letters be used in all lines of the address block.

#### 4.2.2 Zip Codes

The Office of Admissions is responsible for maintaining a yearly contract with the U.S. Postal Service (USPS) to provide IIT with monthly updates to the zip code tables and related City State County relationships. The monthly updates disks will be forwarded to OTS to update the appropriate Banner tables and records affected by any changes.

**Comment [LME3]:** This is not our current practice. It should be revisited. There are subsequent references to this practice and these will remain until a final decision has been made.

**Comment [LM4]:** Should OTS be the responsible party?

### 4.2.3 Symbols and Punctuation

In general the use of symbols and punctuation should be avoided due to the problems these cause in moving data between ancillary systems and Banner.

The following symbols and punctuation should NOT be used under any circumstances when entering addresses:

Percent	%
Pound sign	#
At sign	@
Parentheses	()
Comma	,

The designation for 'in care of' should be abbreviated as "c/o" and should be entered on the first street address line.

Unit designators such as apartment or suite should be written out in full or abbreviated using the standard list of abbreviations in section 4.3.3 below. Do NOT use a pound sign (#) to indicate an apartment or suite number. Omit commas between a street name and a unit designator.

IF YOU ARE GIVEN THIS	ENTER THIS
In Care of Amy	c/o Amy
#3C	Apartment 3C

The **ampersand (&)**, period (.) slash (/) and hyphen (-) may be used as long as there are no spaces before or after these symbols. In general however avoid the use of periods and do not use periods after initials or abbreviations. (This is consistent with the data standards for names.) It is acceptable to use a period as part of what the USPS calls a "grid" address (e.g. 39.2 Rd).

IF YOU ARE GIVEN THIS	ENTER THIS
55 <sup>TH</sup> & Kedzie Streets	55 <sup>th</sup> and Kedzie Streets
200 M Street N.W.	200 M Street NW
44 ½ S. Main Street	44 ½ S Main Street
289-01 Montgomery Ave	289-01 Montgomery Ave

The apostrophe (') may be used as given in an address.

IF YOU ARE GIVEN THIS	ENTER THIS
Downer's Grove Boulevard	Downer's Grove Boulevard

### 4.3 Address Standards for the United States and Canada

The following address standards apply to all addresses in the United States US regions protectorates and overseas military installations and Canada. Please see section 4.4 for information pertaining to other international address standards.

#### 4.3.1 Street Address

United States and Canadian street addresses typically have three components: house number street name and unit designator

EXAMPLE: 123 Main Street Suite C

House Number	Street Name	Unit Designator
123	Main Street	Suite C

These three components should be entered within the Street Address Field. Banner provides three lines of STREET ADDRESS fields to accommodate addresses that require multiple lines of data input.

If the entire street address including the unit designator does not fit on one line enter the unit designator in the first line and the house number and street name in the second line. This is because the United States Postal service reads addresses from the bottom up. (See section 4.2.4 for more information about entering unit designators.)

Do not enter data into the second address line until data has been entered into the first address line. Likewise data should not be entered in the third address line until data has been entered into the second line.

#### 4.3.2 Unit Designators

If the street address contains a unit designator such as an apartment suite building or other structure the preferred location of the unit designator is at the end of the street address if both fit on a single address line. Omit commas between street names and unit designators.

IF YOU ARE GIVEN THIS	ENTER THIS
102 Main St. Apt. 101	102 Main St Apt 101
1356 Executive Dr. Ste 202	1356 Executive Dr Ste 202
1600 Central Pl. Bldg. 14	1600 Central Pl Bldg 14
55 Sylvan Blvd. Rm. 18	55 Sylvan Blvd Rm 18

If the house number and street name (i.e. primary address) do not fit on one address line the unit designator should be entered on the first address line *preceding* the primary address. The unit designator should *never* be on the line *following* the primary address. This is because the US Postal Service reads addresses from the bottom up.

<b>EXAMPLE</b>	
<b>Street Line 1:</b>	Suite 202
<b>Street Line 2:</b>	1356 Executive Dr
<b>Street Line 3:</b>	[BLANK]

Do NOT enter data into the second address line until data has been entered into the first address line. Likewise data should not be entered in the third address line until data has been entered into the second line.

Recommended abbreviations for common unit designators are:

<b>UNIT DESIGNATOR</b>	<b>ABBREVIATION</b>
Apartment	Apt
Building	Bldg
Department	Dept
Floor	Fl
Room	Rm
Suite	Ste
Trailer	Trlr
Basement	Bsmt
Hanger	Hngr
Lot	Lot
Office	Ofc
Penthouse	PH
Space	Spc
Slip	Slip
Pier	Pier
Front	Frnt
Unit	Unit

Refer to the Postal Addressing Standards publication for other unit designator abbreviations.

### **4.3.3 Compass Directions**

If appropriate compass directional words may be abbreviated at the beginning or end of the street name. Since a directional word could be confused with the street name apparent directional words in the middle of the address line should be spelled out. The second directional word must always be spelled out if space will not allow both to be spelled out.

### EXAMPLES

102 N Main St SW  
160 North South St  
1624 N South Blvd

Omit periods from Compass abbreviations. Compass directional words should be abbreviated as follows:

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

If a city name includes a compass direction (e.g. South Holland) do not abbreviate the compass direction in the city name if you have enough space to enter the entire city name spelled out.

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

When entering a street designator do not abbreviate unless necessary to fit the information into a Street Address Line field. This is the case even if you are given an address with the street designator already abbreviated.

Abbreviations for street designators should follow the U.S. Postal Service (USPS) Address standards. Refer to the USPS Standards Publication 28 for abbreviations of designators not listed below.

<b>STREET SUFFIX</b>	<b>ABBREVIATION</b>
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 SUFFIX	ABBREVIATION
Street	St
Terrace	Ter
Trail	Trl
Way	Way

#### 4.3.5 Street Address and P.O. Box

Banner address formats allow three lines of street address information. If an address contains BOTH a street address and a post office box the United States Postal Service (USPS) will deliver mail to the first address line listed above the city/state/zip line. In this situation it is preferred that the post office box be the last part of the address entered before the city/state/zip.

	CORRECT	INCORRECT
<b>Street Line 1:</b>	Evergreen Building	Evergreen Bldg
<b>Street Line 2:</b>	1379 W Pine	PO Box 2351
<b>Street Line 3:</b>	PO Box 2351	1379 W Pine

Do not enter data into the second address line until data has been entered into the first address line. Likewise data should not be entered in the third address line until data has been entered into the second line. An example of a three-line address is:

EXAMPLE	
<b>Street Line 1:</b>	c/o Marvin Martian
<b>Street Line 2:</b>	Chanin and Levers Inc
<b>Street Line 3:</b>	1600 Martian Blvd Ste 910

#### 4.3.6 Street Address and "In Care of" or "Attention"

"In care of" (c/o) or "Attention" ("ATTN") is placed above the name of the business or organization. See the examples immediately above and below.

##### EXAMPLE

<b>Street Line 1:</b>	ATTN Marvin Martian
<b>Street Line 2:</b>	Chanin and Levers Inc
<b>Street Line 3:</b>	1600 Martian Blvd Ste 910

#### 4.3.7 City

Banner is configured to automatically enter the city name when a zip code is entered. This is the

preferred method of entering the city name. If the city name that defaults is not correct it is acceptable to enter the actual city name. For example when entering the zip code 48198 the city will default as Ypsilanti but could also be the city of Rawsonville. If necessary manually change the city to Rawsonville following the standards below.

City name is to be entered in title case i.e. the first letter of each word is capitalized. Spell out city names in their entirety. If it is necessary to abbreviate city names to fit within the 20 characters allowed by Banner use abbreviation standards described herein or in the US Postal Service Postal Addressing Standards (Publication 28).

<b>PREFERRED</b>	<b>ACCEPTABLE</b>
Newberry Springs	Newberry Spgs
West Stockbridge	W Stockbridge

#### **4.3.8 State and Province**

Banner is configured to automatically enter the state name when a zip code is entered. This is the preferred method of entering the state name.

State codes must be entered for all U.S. and Canadian addresses. The appropriate code may be selected using Banner software. For additional information refer to the Postal Service Address Standards publication.

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

Canadian Provinces each have a two-character code. These are listed below.

##### **LIST OF CANADIAN PROVINCE NAMES AND CODES**

Alberta (AB)	Nunavut (NU)
British Columbia (BC)	Ontario (ON)
Manitoba (MB)	Prince Edward Island (PE)
New Brunswick (NB)	Quebec (QC)
Newfoundland/Labrador (NL)	Saskatchewan (SK)
Northwest Territories (NT)	Yukon (YT)
Nova Scotia (NS)	

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

#### **4.3.9 County**

Banner is configured to automatically enter the county name when a zip code is entered. This is the preferred method of entering the county name. The county code is a 5-character code consisting of the 2-character state code plus the 3-digit FIPS (Federal Information Processing Standards) county code (PUB 6-4 May 2002). If no county defaults when entering the zip enter the county code from the list of values in the validation form.

### **4.3.10 Zip or Postal Code for US and Canadian Addresses**

Zip or postal codes MUST be entered for all U.S. and Canadian addresses. Entering the first five digits of the zip code will cause the Banner system to automatically populate the city and state fields. International postal codes must be entered in the ZIP CODE field. No other method is acceptable. If an international postal code is not available enter a period in the ZIP CODE field.

#### **4.3.10.1 United States**

When entering or changing an address DO NOT enter a hyphen or the “plus4” digits that sometimes accompany a zip code.

#### **4.3.10.2 Canada**

Enter the 6-character postal code by keying in 3 characters a space and the last 3 characters. All letters in a Canadian postal code must be entered in Capitals

**EXAMPLES:**

T2T 2Y5

R2L 1N4

### **4.3.11 Nation for US or Canadian Addresses**

Do NOT enter a country code for U.S. addresses. Banner is configured to automatically enter the country name when a zip code is entered. In Banner the default country designation is “US.”

A nation code is required for all non-U.S. addresses including Canada. Banner maintains a list of all the current code options available (FIPS PUB 10-4).

Postal standards request nation codes be in all caps. The **downloaded values from FIPS comes in all caps.**

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

Several United States Postal Service (USPS) publications deal with addressing standards. The most comprehensive and accessible publication is Postal Addressing Standards Publication 28. This publication is available from the USPS 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 Canadian Postal service (Canada Post) also offers a very useful addressing guide:

[http://www.canadapost.ca/offerings/address\\_management/pdf/addressing\\_guide-e.pdf](http://www.canadapost.ca/offerings/address_management/pdf/addressing_guide-e.pdf)

## 4.4 Military Addresses

### 4.4.1 Domestic Locations

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

<b>EXAMPLE #1</b>	
<b>Street Line 1:</b>	Lowery Air Force Base
<b>Street Line 2:</b>	8205 East Sixth Avenue 405
<b>Street Line 3:</b>	[BLANK]
<b>City:</b>	Denver
<b>State or Province:</b>	CO
<b>ZIP or Postal Code:</b>	80234

<b>EXAMPLE #2</b>	
<b>Street Line 1:</b>	2314 Barracks St
<b>Street Line 2:</b>	[BLANK]
<b>Street Line 3:</b>	[BLANK]
<b>City:</b>	Minot AFB
<b>State or Province:</b>	ND
<b>ZIP or Postal Code:</b>	58705

### 4.4.2 Overseas Locations

Overseas military addresses must conform to domestic addressing standards. Additionally each branch of the military has its own requirements:

- Mail addressed to Army personnel must show full name including first name middle name or initial and unit number.
- Mail addressed to Air Force personnel must show full name including first name middle name or initial and PSC or unit number.
- Mail addressed to Navy and Marine Corps personnel must show full name including first name and middle name or initial and PSC number for shore-based units or ship name.

The delivery address line must show the ship name (if applicable) the unit number the CMR or PSC number and the box number (if assigned).

Enter the zip code in the zip code field.

The APO (Army Post Office) or FPO (Fleet Post Office) code will default into the City field.

The military 'State' code (AA AE or AP) will also default into the State field.

- AA for mail in the Americas other than Canada (340nn where "nn" are the remaining two zip code digits).
- AE for mail going to Europe the Middle East Africa and Canada (090nn through 098nn).
- AP for mail destined to the Pacific (962nn through 966nn).

<b>EXAMPLE #1</b>	
<b>Street Line 1:</b>	Unit 2050 Box 4190
<b>Street Line 2:</b>	[BLANK]
<b>Street Line 3:</b>	[BLANK]
<b>City:</b>	APO
<b>State or Province:</b>	AP
<b>ZIP or Postal Code:</b>	96522-1215

<b>EXAMPLE #2</b>	
<b>Street Line 1:</b>	B Division
<b>Street Line 2:</b>	USS North Dakota
<b>Street Line 3:</b>	[BLANK]
<b>City:</b>	FPO
<b>State or Province:</b>	AA
<b>ZIP or Postal Code:</b>	34093-2344

#### 4.5 International Addresses

Refer to Appendix X for samples of typical international mailing addresses. These are reported by country. Use the example given for a particular country as a guide for how to enter the address data into the three address lines provided by Banner. Remember that the country or nation name is entered in a separate field. Use the Nation Validation values to enter nation or country codes. This way the university can better control the printing of international addresses on letters and forms.

Enter an international address exactly as provided **including punctuation and capitalization**. Do not abbreviate words that are spelled out.

Enter the city name in the City field. Some countries require that the city name be entered in all caps.

**Comment [LM5]:** This is different from existing data entry standards for SIS, however we have been informed that many international addresses contain commas and punctuation

Enter the province or state in Address Line 3 except in the case of Canadian addresses. Canadian addresses should use the state/province code field for the province code.

Enter postal code in the ZIP or Postal Code field.

<b>EXAMPLE #1</b>		
<b>Street Line 1:</b>	95 Yong An Road	← Street Number & Name
<b>Street Line 2:</b>	Beijing Friendship Hospital	← Building Name
<b>Street Line 3:</b>	[BLANK]	
<b>City:</b>	BEIJING	← City/Town/Locality
<b>State or Province:</b>	[BLANK]	
<b>ZIP or Postal Code:</b>	100050	← Postal Code

<b>EXAMPLE #2</b>		
<b>Street Line 1:</b>	Flat No 100	← Street or Apt Number
<b>Street Line 2:</b>	Triveni Apartments	← Building Name
<b>Street Line 3:</b>	Pitam Pura	← Street Address or Name
<b>City:</b>	NEW DELHI	← City/Town/Locality
<b>State or Province:</b>	[BLANK]	
<b>ZIP or Postal Code:</b>	110034	← Postal Code

#### 4.5.1 Nation for International Addresses

A nation code is required for all non-U.S. addresses including Canada. IIT will use the Internal Revenue Service nation codes because these are the codes used by Windstar (an ancillary system) to calculate payroll taxes. The IRS nation codes can be found at:

<http://www.irs.gov/instructions/i1042s/ar02.html>

In Banner the default country designation is "US."

Postal standards request nation codes be in all caps.

#### 4.5.2 Zip or Postal Code for International Addresses

If available postal codes should be entered in the ZIP CODE field. If a postal code is not readily discernable the given address should be entered as it appears and a period should be entered in the ZIP CODE field.

### 4.5.3 Address Types

IIT maintains a standardized list of address types (see Table 4.2.3-1). Each address type has a data steward who is responsible for the creation and change of each address type (see Table 4.2.3-2). Different business processes will “look for” a valid address in a different prescribed order. For example the grade mailing process for undergraduates might look for addresses in the following order: GR RH LO and then PR. When adding a subsequent address of the same type the prior address should be end dated and the new address added. Unless making a correction due to an initial entry error do not change or delete the prior address.

**Table 4.5.3-1. Address Type Codes Code Descriptions and Rules for Use**

CODE	DESCRIPTION	WHEN TO USE
AP	Accounts Payable Remit-to	<b>For Accounting Dept Use Only:</b> Address to which a payment should be sent.
B1	Business 1	<b>For Advancement Use Only:</b> Person’s employer or business address.
B2	Business 2	<b>For Advancement Use Only:</b> Person’s second employer or business address.
BI	Billing	<b>For Bursar’s Office Use Only:</b> Address to which a student’s bill should be sent.
BU	Third-party Billing	<b>For Bursar’s Office Use Only:</b> Address to which a student’s bills should be sent when a third party (e.g. an employer) is paying the student’s tuition.
CM	Campus Mailing	Campus mailing address for a person.
EM	Emergency contact	Address of a local emergency contact for a person.
MA	Mailing Address	Address to which a person wants their mail from IIT sent, <i>if different from their permanent address.</i>
LO	Local	Local address of a person , if different from their permanent address.
N1	Next of Kin or Guardian (1)	Address of the student’s parent, guardian or next-of-kin.
N2	Next of Kin or Guardian (2)	Address of the student’s second parent, guardian or next-of-kin, <i>if different from the first.</i>
PO	Purchase Order - from	<b>For Accounting Dept Use Only:</b> Address to which an order should be sent.
PR	Permanent	Address of person’s place of legal residence. <i>For International Studentss, SEVIS requires that this be a non-US address.</i>
WK	Work	<b>For Bursar’s Office and International Center Use Only:</b> Address of a student’s place of employment, on or off campus. To be used only for mail directed to the student.

**Table 4.5.3-2. Data Stewards for Address Types**

ADDRESS TYPE	DESCRIPTION	DATA STEWARD
AP	Accounts Payable – Remit To	Accounting Department (Accounts Payable)
B1	Business 1`	Institutional Advancement
B2	Business 2	Institutional Advancement
BI	Billing	Bursar's Office
BU	Third-party Billing or Business	Bursar's Office
EM	Emergency Contact	Student Records & Registration and HR
MA	Mailing Address	Student Records & Registration and HR
LO	Local	Student Records & Registration and HR
N1	Next-of-Kin or Guardian 1	Student Records & Registration
N2	Next-of-Kin or Guardian 2	Student Records & Registration
PO	Purchase Order	Accounting Department (Purchasing)
		Student Records & Registration (Students) Human Resources (Faculty and Staff)
PR	Permanent	Admissions (Recruits and Applicants)
WK	Work	Bursar's Office and International Center

#### 4.5.4 Address Sources

When selecting an address to use for a specific purpose it is helpful to know the source of the address information. Sources of the address are shown on the STVASRC table in Banner and described in Table 4.2.4-1 below. Each address source has a data steward who is responsible for the creation and change of each address source (see Table 4.2.3-2).

**Table 4.5.4-1. Address Source Codes Code Descriptions and Rules for Use**

CODE	DESCRIPTION	WHEN TO USE
APPL	Admission application	Use when an applicant address is created based on an admission application.
BURS	Bursar source	Use when a student address is updated based on a source used by the Bursar's office such as a credit report.
CHK	Payment check	Use when a student address is updated based on a personal check used for payment.
EDE	Electronic Data Exchange	Use when an applicant address is created or updated based on an electronic data load from an outside source.
LGCY	Legacy Data	Use when an address is created or updated based on data from an IIT legacy system, e.g., HRS, SIS, or FRS.

CODE	DESCRIPTION	WHEN TO USE
MAIL	Returned Mail	Use when a student or alumnus address is updated based on mail returned to IIT by the USPS with an address correction.
OUTS	Outside Source, Hardcopy	Use when an address is updated based on a hardcopy document from an outside source, not including a check or invoice. <b>Do not use for vendor addresses.</b>
VEND	Vendor Materials	<b>For Accounting Dept Use Only:</b> Use when an address is created or updated based on vendor materials such as a catalog, website, or invoice.
WEB	Web Self Service	Use when a student faculty or staff member self-reports an address change via the web self-service application.

**Table 4.5.4-2. Data Stewards for Address Sources**

CODE	DESCRIPTION	DATA STEWARD
APPL	Admission application	Admissions
BURS	Bursar source	Bursar's Office
CHK	Payment check	Bursar's Office
EDE	Electronic Data Exchange	Financial Aid
LGCY	Legacy Data	
MAIL	Returned mail	Student Records & Registration (Students) Institutional Advancement (Alumni)
OUTS	Outside Source, Hardcopy	Student Records & Registration (Students) Institutional Advancement (Alumni)
VEND	Vendor Materials	Purchasing, Accounts Payable
WEB	Web Self Service	Student Records & Registration (Students) HR (Faculty and Staff)

#### **4.6 Standard Change Record**