

DATA STANDARDS DOCUMENT

FOR ALL

BANNER SYSTEMS



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TABLE OF CONTENTS

INTRODUCTION.....	4
1 NAMES.....	5
1.1 General.....	5
1.2 Standards for Adding a New Record.....	5
1.2.1 Case	5
1.2.2 Initials	5
1.2.3 Spaces.....	5
1.2.4 Punctuation.....	5
1.2.5 Prefixes and Suffixes	6
1.2.6 Previous Names	6
1.2.7 Legal Name	6
1.2.8 Preferred First Name	6
1.2.9 Non Person Name	6
1.2.10 Name Type and Description	7
1.3 Procedures	7
1.3.1 Adding New Records.....	7
1.3.2 Data Integrity across Multiple Modules.....	9
1.3.3 Name Change Policies	10
2 ADDRESSES	11
2.1 General.....	11
2.2 Standards.....	11
2.2.1 Street Standards.....	11
2.2.2 Punctuation.....	11
2.2.3 Symbols.....	12
2.2.4 Secondary Address Unit Designators.....	12
2.2.5 Compass Directions	1
2.2.7 Abbreviations for Street Designators	2
2.2.8 Sources for Additional Information	2
2.2.9 City	2
2.2.10 State and Province	3
2.2.11 County	3
2.2.12 Zip or Postal Code.....	3
2.2.13 Country	4
2.2.14 Military Address	4
2.2.15 International Addresses.....	5
2.2.16 International Addresses and SEVIS	5
2.2.17 Hierarchy of Modifications	6
2.2.18 Address Types.....	6
2.2.19 Address Types Codes	7
2.3.1 Guidelines.....	8
Before changing an address, go to the GUASYST table to determine ownership then notify the appropriate office. The following table provides examples of ownership and rules:.....	8
2.3.2 Adding a New Address	9
3 TELEPHONE NUMBERS	10

3.1	General.....	10
3.2	Standards.....	10
3.2.1	Telephone Type Codes	10
3.2.2	Telephone Numbers	11
3.4.1	Adding New Records.....	13
4	E-MAIL.....	14
4.1	General.....	14
4.2	Standards.....	14
4.2.1	E-Mail Address Type Codes.....	14
4.3	Procedures.....	15
4.3.1	Adding an E-Mail Address	15
5	CALENDAR DATES.....	16
5.1	General.....	16
5.2	Standards.....	16
5.2.1	Calendar Dates.....	16
5.2.2	Shortcuts	16
6	GENDER.....	17
6.1	General.....	17
6.2	Standards.....	17
6.2.1	Gender Codes	17
7	SOCIAL SECURITY NUMBER	18
7.1	General.....	18
7.2	Standards.....	18
7.2.1	Social Security Number	18
7.3	Procedures.....	18
7.3.1	Changes to Social Security Number.....	18
8	DATE OF BIRTH	19
8.1	General.....	19
8.2	Standards.....	19
8.2.1	Date of Birth.....	19
8.2.2	Changes to Date of Birth	19
8.3	Procedures.....	19
9	MARITAL CODE.....	20
9.1	General.....	20
9.2	Standards.....	20
9.2.1	Marital Code	20
10	ETHNICITY CODE	21
10.1	General.....	21
10.2	Standards.....	21
10.2.1	Ethnicity.....	21
11	DECEASED INFORMATION.....	22
11.1	General.....	22
11.2	Standards.....	22

11.3 Procedures	22
12 CITIZENSHIP, VETERAN AND LEGACY INFORMATION, RELIGION CODE, DRIVER'S LICENSE INFORMATION, EMERGENCY CONTACT INFORMATION	23
12.1 General.....	23
12.2 Standards	23
12.2.1 Citizen Type.....	23
12.2.2 Legacy Code	23
12.2.3 Veteran File Number	23
12.2.4 Religion Code	23
12.2.5 Driver's License Information	23
12.2.6 Emergency Contact Information	23
13 CONFIDENTIAL RECORDS.....	24
13.1 General.....	24
13.2 Standards	24
13.3 Procedures	24
13.3.1 Confidentiality Indicator	24
13.3.2 Releasing Confidential Information.....	24
15 APPENDIX 1 – NATION CODES.....	25
16 APPENDIX 2 – STATE AND PROVINCE CODES.....	26
17 APPENDIX 3 – SPECIAL CHARACTER SET	27
18 APPENDIX 4 – PREFIXES	28
19 APPENDIX 5 – SUFFIXES.....	30

Introduction

Banner® is an integrated system that is used university-wide, so it is extremely important that offices and departments comply with these standards when entering data into the system. This is to avoid duplication of records, to simplify searches, and to ensure an attractive, professional appearance when data is displayed in reports.

The Coordinating Committee was formed to develop standards and make decisions regarding the maintenance of data in the system. This committee is composed of representatives from offices that have the responsibility to enter and maintain records in Banner. They are also responsible for granting access privileges so others can view, enter, update and generate reports from Banner.

If you have any questions regarding the use or update of these Standards, please ask for the Banner Coordinating Committee member from one of these offices: Office of the Registrar, Business and Finance, Financial Aid, Admissions, Assessment and Planning, Human Resources, or Alumni/Advancement. When in doubt, always refer to this manual, not co-workers, before entering or altering any record.

1 Names

1.1 General

Names and addresses in Banner 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 or address is printed on correspondence, it looks contemporary and professional.

1.2 Standards for Adding a New Record

Enter the last, first and middle names exactly as the person has indicated. If given the full middle name, enter the full middle name. Do **NOT** change a full name to an initial. Always use normal upper-and lower-case letters for names. One exception, Human Resources enters the name as it appears on an employee's Social Security card. **Caution:** the University is using the current name as the legal name in Banner. A person's legal name appears on a court order, social security card, marriage license or passport.

1.2.1 Case

If the person has written all upper-case letters, enter the **normal** upper-and lower-case letters. If the person's name starts with a lower-case letter, enter the first letter in lower case (for example, duBois).

1.2.2 Initials

Use a period after initials, whether a first name initial or a middle name initial. See the following examples:

D. Gary Smith (First name = D.; Middle name = Gary)
Pamela A. Humphrey (Middle name = A.)
Leslie M. F. Donner (Middle name = M. F.)

Note: Do not use an initial for the first name unless the name appears as such on legal name documentation (see 1.2 and 1.2.8).

1.2.3 Spaces

Maintain spaces in last names (one space maximum). See the following examples:

Van Buren
Van der Eijk
Vander Eijk

1.2.4 Punctuation

Use hyphens, apostrophes, dashes or periods exactly as the person indicates in writing. Do not **add** punctuation where there is none. In the following example, either could be correct:

O'Donnell, or ODonnell, Smith-Jones or Smith Jones

1.2.5 Prefixes and Suffixes

DO NOT enter prefixes and suffixes such as Mr., Ms., Lt., or Rev. and Jr., IV, or Esq. in the name fields of the current identification block on the Banner IDEN forms. *Enter prefixes and suffixes in the respectively named fields on the General Person forms. See Appendix 4 & 5 for common prefixes and suffixes.*

1.2.6 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 last or first names (for example, an Admissions graduate application or an Office of the Registrar form requesting a copy of an official UMW transcript). Storage of an individual's Previous Last Name may prevent duplication of records ensuring accurate record matching. Enter the earliest name first.

Example:

Current Name: Lee Livingstone
Previous Name: Lee Stanley
Enter Previous Last & First Names (Lee Stanley) and save.
Enter Current Last and/or First Name (Lee Livingstone) and save.
The Previous Last and First Names will appear in the Previous Identification Block.

1.2.7 Legal Name

The Legal Name Field is **NOT** used or maintained by the University.

1.2.8 Preferred First Name

Offices may enter names in this field.

Example:

William Knight (Preferred First Name: Bill) – William would be entered in the First Name Field and Bill would be entered in the Preferred First Name Field.

D. Mark Wilson (Preferred First Name: Mark) – D. would be entered in the First Name Field and Mark would be entered in the Preferred First Name Field.

1.2.9 Non Person Name

All information is typed in upper/lower case format; i.e., not all caps or all lower. 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 Banner (e.g., The Colorado College).

1.2.10 Name Type and Description

The “current” name in Banner should **not** have a name type identified; however, the following name types may appear on an individual’s record:

Name Type Codes:

AMEN	Advancement Memorial Name
ATND	Attended as Name
CN	Information System Use Only
FMR	Former Name
LEGL	Legal Name
LGCY	Legacy ID Converted to Banner
PREF	Alumni Preferred Name

1.3 Procedures

1.3.1 Adding New Records

Person and non-person records are created the first time someone enters them in Banner. Multiple offices have the ability to create new entities in Banner (e.g., Alumni/Advancement, Admissions, Human Resources, Registrar). Each office will develop individual procedures for adding Banner person and/or non-person records.

1.3.1.1 Creation of New Person or Non-Person Records

Person and non-person records are created the first time someone enters them in Banner. The following offices have the ability to create a new student, general person or non-person record.

Office	Type of Entity
Admissions	Prospective Applicants/Admitted Students
Athletics	Prospective Applicants
Office of the Registrar	Students
Financial Aid	Lending Institutions
Student Accounts	Bill Payer or 3 rd Party Misc. AR Accounts
Accounts Payable	Vendors
Human Resources	Job Applicants, Employees
Campus Police	Person (parking permits)
Alumni/Advancement	Constituent (parents/donor), person or non-person
Deans Office	Faculty

1.3.1.2 Searching to Prevent Duplicate Records

A complete search must be done before entering a new person or non-person record in Banner. Any entities that are in Banner more than once must go through the “Multiple Record Duplicate/Delete PIDM Process” in order to be purged from the System. It is vital that all University Offices develop written search guidelines and procedures for their staff to use; and, that they ensure that these procedures are strictly enforced.

Suggested Search Methods:

- Search on Social Security Number using the Advanced Search form
- Search using the person/non-person full name (last, first)
- Search on any portion of the name using the Banner wildcard (%)
- Convert nicknames to “full” first name or convert “full” first names to possible nicknames (e.g. Bill to William and/or William to Bill or Will).
- Use the “soundex” feature if you are not sure of the spelling
- Verify date of birth, gender, or address

NOTE: This precaution may take a few minutes to perform, whereas fixing a duplicate PIDM may take several weeks.

1.3.1.3 The Multiple Record Duplicate/Delete PIDM Process

There is a Banner Discussion Group that meets on a regular basis to attempt to solve issues regarding multiple records. The Group consists of campus-wide representation. Group members are responsible for identifying which records in Banner are problematic. If there is a conflict with ownership the Group member responsible for the discovery of the “duplicate” record must consult with the appropriate data “owner” to determine which record should be marked for deletion in order to avoid the loss of vital data. In addition, Group members are responsible for adhering to rules established by the DOIT team.

1.3.2 Data Integrity across Multiple Modules

A common institutional database offers the potential for better service and convenience to our constituents. Each administrative unit must be cognizant of data integrity requirements of other University offices in its practices.

Name change practices are a key example where specific policies must be followed. For instance, before changing a record, it is necessary to determine in which modules the record appears (e.g., to determine ownership) whenever an individual requests a name change. The Banner form GUASYST will list the different modules for individuals with more than one record in the System. For example, if an individual is a former student, an alumnus, and a current graduate applicant the Student (Registrar), Alumni/Advancement, and Applicant (Admissions) boxes on the form will be checked indicating that information on this individual exists in all these modules.

While GUASYST is a handy tool, it should not be your only search method. It should simply be your first step in determining if a duplicate record exists and in determining ownership. The best tool to use is the detailed report GXVDUPS which allows you to perform single or multiple record searches. This report provides additional detailed information such as an individual's date of birth, social security number, home address, whether they have an outstanding admissions application, whether they are registered for classes, whether they are an employee, etc. Banner Discussion Group members should also complete and keep a copy of the Multiple PIDM Resolution Form documenting their reasons why they marked a certain record for deletion. See Appendix 6 for detailed instructions and an example of the GXVDUPS report and Appendix 7 for a copy of the Multiple PIDM Resolution Form.

1.3.3 Name Change Policies

The following chart summarizes policies and procedures for making name changes for person and non-person entities in Banner. Informed professional judgment 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 should be kept and no documentation is required. When making a name change the following guidelines should be met:

Entity Type	Responsible Office	Procedures
Employee (faculty or staff – whether or not any other record type exists)	Human Resources	Complete a Name Change Request Form and request a copy of the person’s Social Security Card
Student (current – excluding faculty or staff who should follow the “Employee” guidelines stated above)	Office of the Registrar	Use Name Change Request Form and request one of the following items: <ul style="list-style-type: none"> • Social Security Card • Marriage Certificate/License • Court Order Document • Driver’s License • Passport
Vendors	Accounts Payable	New Vendor Form required for vendors outside of the University; Employee, Student or 3 rd Party Vendors will be changed based upon information received from the Office of the Registrar, Human Resources, or Student Accounts.
Admissions (recruits or applicants)	Office of Admissions	Change upon request of individual. No documentation required.
Athletics (recruits)	Athletics or Office of Admissions	Change upon request of individual. No documentation required.
3 rd Party Payee	Student Accounts	Change upon request of individual. No documentation required.
Student (current or offered applicant)	Financial Aid	Use Name Change Request Form and request one of the following items: <ul style="list-style-type: none"> • Social Security Card • Marriage Certificate/License • Court Order Document • Driver’s License • Passport
Alumni Constituents, Former Students and Former Parents	Alumni/Advancement	Alumni may update on the Alumni Community Website or call or write the Alumni Office to request a name change. No backup is required.

2 Addresses

2.1 General

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, offices with marketing responsibility such as Alumni/Advancement and Admissions must be able to produce individualized correspondence conforming to formal addressing rules. These standards must balance three considerations:

Banner system requirements

University Correspondence Style Guide (for a current copy go to the following website http://www.umw.edu/policies/style_guide/default.php)

*The 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 the University.

For example, an admission prospect or a vendor address might be received on paper or electronic tape as follows:

William P Hicks 1238 S Humboldt St. Unit 234 Denver CO 80218-2455

While other data may be conditioned (or reformatted) on output (e.g., date format), it is our intention that addresses be entered exactly as they will print on correspondence, reports, etc. Accurate, consistent address data entry is vital. Data Entry Standards requires the address be corrected as follows:

William P. Hicks
1238 S. Humboldt St., Unit 234
Denver, CO 80218-2455

Given these considerations, the following address data entry standards are recommended.

2.2 Standards

2.2.1 Street Standards

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

2.2.2 Punctuation

Punctuation (hyphens, periods, slashes, commas and apostrophes) should be used if space permits. With the exception of the hyphen in the zip plus 4 configuration, punctuation in the delivery address block may be omitted if necessary and according to the established hierarchy for modifications.

2.2.3 Symbols

The percent symbol “%” should never be used in the first position of an address field.

The ampersand “&” should only be used in place of “and” if it is used on individual or business letterhead.

The designation for “in care of” should be abbreviated as “c/o” when necessary and should only be entered on the first street address line.

Never use the pound sign “#” as the first character in an address.

2.2.4 Secondary Address Unit Designators

Banner address formats allow three lines of street address information.

If the primary address is a multi-unit apartment or building, place the room, suite, or apartment number on the first street address line if possible.

For example:

1356 South Executive Dr., Suite 202

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.

For example:

Suite 202
1356 South Executive Dr.

The pound sign “#” is acceptable as a unit designator if the unit type is unknown (e.g., 1624 West Donner St. # 101). Key a space in between the pound sign and the unit designator numbers or letters. Do NOT use “No.” as a unit designator.

Recommended abbreviations for common street/unit designators are:

Annex	Anx.	Expressway	Epxy.	Lane	Ln.	Road	Rd.
Arcade	Arc.	Fall	Fall	Light	Lgt.	Row	Row
Avenue	Ave.	Falls	Fls.	Loaf	Lf.	Run	Run
Bayou	Byu.	Ferry	Fry.	Locks	Lcks.	Shoal	Shl.
Beach	Bch.	Field	Fld.	Lodge	Ldg.	Shore	Shr.
Bend	Bnd.	Fields	Flds.	Loop	Loop	Shores	Shrs.
Bluff	Blf.	Flats	Flt.	Mall	Mall	Spring	Spg.
Bottom	Btm.	Ford	Frd.	Manor	Mnr.	Springs	Spgs.
Boulevard	Bldv.	Forest	Frst.	Meadows	Mdws.	Spur	Spur
Branch	Br.	Forge	Frg.	Mill	MI.	Square	Sq.
Bridge	Brg.	Fork	Frk.	Mills	Mls.	Station	Sta.
Brook	Brk.	Forks	Frks.	Mission	Msn.	Stravenue	Stra.
Burg	Bg.	Fort	Ft.	Mount	Mt.	Stream	Strm.
Bypass	Byp.	Freeway	Fwy.	Mountain	Mtn.	Street	St.
Camp	Cp.	Gardens	Gdns.	Neck	Nck.	Summit	Smt.
Canyon	Cyn.	Gateway	Gtwy.	Orchard	Orch.	Terrace	Ter.
Cape	Cpe.	Glen	Gln.	Oval	Oval	Trace	Trce.
Causeway	Cswy.	Green	Grn.	Park	Park	Track	Trak.
Center	Ctr.	Grove	Grv.	Parkway	Pkwy.	Trafficway	Trfy.
Circle	Cir.	Harbor	Hbr.	Pass	Pass	Trail	Trl.
Cliffs	Clfs.	Haven	Hvn.	Path	Path	Trailer	Trlr.
Club	Clb.	Heights	Hts.	Pike	Pike	Tunnel	Tunl.
Corner	Cor.	Highway	Hwy.	Pines	Pines	Turnpike	Tpke.
Corners	Cors.	Hill	Hl.	Place	Pl.	Union	Un.
Course	Crse.	Hills	Hls.	Plain	Pln.	Valley	Vly.
Court	Ct.	Hollow	Holw.	Plains	Plns.	Viaduct	Via.
Courts	Cts.	Inlett	Inlt.	Plaza	Plz.	View	Vw.
Cove	Cv.	Island	Is.	Point	Pt.	Village	Vlg.
Creek	Crk.	Islands	Iss.	Port	Prt.	Ville	VI.
Crescent	Cres.	Isle	Isle	Prairie	Pr.	Vista	Vis.
Crossing	Xing.	Junction	Jct.	Radial	Radl.	Walk	Walk
Dale	Dl.	Key	Ky.	Ranch	Rnch.	Way	Way
Dam	Dm.	Knolls	Knls.	Rapids	Rpds.	Wells	Wls.
Divide	Dv.	Lake	Lk.	Rest	Rst.		
Drive	Dr.	Lakes	Lks.	Ridge	Rdg.		
Estates	Est.	Landing	Lndg.	River	Riv.		

Examples:

102 Main St., Apt. 101
 1356 Executive Dr., Rm. 202
 1600 Central Pl., Bldg. 14
 55 Sylvan Cswy., Lndg. 18
 101 Jefferson Davis Hwy.
 123 Ft. McHenry

2.2.5 Compass Directions

If appropriate, compass directional words may be abbreviated at the beginning and/or end of the street name. Because a directional word could be confused with the street name, apparent directional words in the middle of the address line should be spelled out.

Examples:

102 N Main St., SW
160 North South St.

Compass directional words should be abbreviated as follows:

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

2.2.6 Street Address and PO Box Number

As stated earlier, Banner address formats allow up to three lines of street address information; however, if both the physical street address and PO Box number need to be maintained, you have two entry options. First you may enter the physical street address on the first street address line and you may enter the PO Box number on the second street address line – entering both under the same address type;

P.O. Box 1042

448 Blackberry Court

or, you may create two different address types. For instance, the physical address may be entered as the home address type (HM) and the PO Box number may be entered as the mailing address type (MA).

2.2.7 Abbreviations for Street Designators

Refer to the U.S. Postal Service Address Standards publication for abbreviations of designators not listed in 2.2.4.

2.2.8 Sources for Additional Information

There are style manuals that deal with formal addressing styles available on the U.S. Postal Service website. The most comprehensive manual is the *Postal Addressing Standards, Publication 28* (to access the PDF version of Publication 28, log onto <http://pe.usps.gov> and click on the Postal Addressing Standards option).

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/>

The Canadian Postal service (Canada Post) also offers a very useful web site:

<http://www.canadapost.ca/business/default-e.asp>

2.2.9 City

All information is typed in upper/lower case format, (e.g., 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, Publication 28*. The system will populate city and state automatically if you leave them blank and enter a zip code number first.

International information is typed in upper/lower 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/or postal code in the 20 characters of the city field; however, 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 possible. If it is necessary to abbreviate city names to fit within 20 characters, use abbreviation standards. For additional information or examples regarding data entry of an international address see Section 2.2.15.

2.2.10 State and Province

State codes **MUST** be entered for all US and Canadian addresses. The appropriate code may be selected using Banner software. For additional information, refer to the US Postal Service *Postal Addressing Standards, Publication 28*. See *Appendix 2* for state and province codes.

Canadian Provinces are entered in the State/Province field, **NOT** in the City field. Canadian Provinces include Alberta, British Columbia, Manitoba, New Brunswick, Newfoundland and Labrador, Northwest Territories, Nova Scotia, Ontario, Prince Edward Island, Quebec, Saskatchewan, and Yukon. They have their own code for entry into the state field. (Note: Canadian addresses can be system generated from zip code entry).

International States and Provinces (excluding Canada) are entered in the City field, **NOT** in the State/Province field. This field should be blank for all other International addresses.

2.2.11 County

The county field is populated **automatically** if you enter a zip code before you enter the city or state information; or, you may enter the county code from the list of values in the System's validation form. It is important to remember to also enter county codes (e.g., state codes) for non-Virginia addresses. For international addresses the code should default to foreign country.

2.2.12 Zip or Postal Code

Zip or postal codes **MUST** be entered for all US and Canadian addresses. If applicable, you may also enter zip or postal codes for international addresses in this field.

2.2.12.1 United States

A **hyphen** must be entered when the entire 9 digit zip code is available. Example: 97203-5798.

2.2.12.2 Canadian

Enter the six-character postal code by keying in 3 characters, a space, and the last 3 characters. Examples: T2T 2Y5 or R2L 1N4.

2.2.13 Country

A country code is required for all non-US addresses including military addresses. The country code for military addresses should default to state unknown or Virginia county unknown (if the applicant is requesting in-state tuition rates). Banner maintains a list of all the current code options available. See Appendix 1 regarding policy and procedure for changing or adding country codes. Leave the country code blank for all US addresses.

2.2.14 Military Address

2.2.14.1 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 (340)
- AE for mail going to EUROPE, the MIDDLE EAST, AFRICA, and CANADA (090 through 098)
- AP for mail destined to the Pacific (962 through 966)

Example:

Sgt. Cherry Downey
PSC 802 Box 2625
APO AE 09777-0010

2.2.14.2 Domestic Locations

All domestic military mail **must** have a regular street style address:

Example:

Col. Margaret Henry
Lowry Air Force Base
8205 E Sixth Ave., #205
Denver, CO 80234

2.2.15 International Addresses

Care should be taken to enter international addresses as closely as possible to the format required by that country. The country name appears automatically when a Nation code is entered (see Section 2.2.13). The City field is required, and three address lines are available. Due to limited space, in some cases the postal code and city may have to be inserted in the City field.

Example:

Renée Duval
27 Rue Pasteur
14390 Cabourg
France

In other cases, the postal code alone should appear in the City Field:

Walter C. Brown
49 Featherstone Street, Abasa
EC1Y 8SY
Nigeria

There are numerous resources available for international addresses. An easily accessible reference can be found at the following website:

<http://www.bitboost.com/ref/international-address-formats.html#Formats>

The most authoritative resource is the Universal Postal Union website:

<http://www.upu.int/index/html>.

2.2.16 International Addresses and SEVIS

The University is required to track and report information to the government on international students and exchange visitors visiting the US on an F, J or M visa. We are required to maintain and report address information including a permanent foreign address and a local address. For individuals with an F, J, or M visa status, the home (MA) address **must** be a valid foreign permanent address. A valid local address **must** be entered in the System as either an on-campus (BX) address type or a local (LO) address type.

2.2.17 Hierarchy of Modifications

When it is necessary to modify addresses to fit Banner fields or conventions, use these steps as guidelines:

- When secondary delivery information, (e.g., Apt, Building, Suite, etc.) is part of the address but does not fit on the Delivery Address Line, place all components of the secondary delivery information immediately above the Delivery Address Line.

Example:

Ms. Jane Doe
Building 14-100
14200 E Mississippi Pkwy
Aurora CO 80111-1111

- Abbreviate addresses using standard postal abbreviations.

Example:

Ms. Jane Doe
58000 E Happy Canyon Blvd
Englewood CO 80110

- Remove punctuation when applicable.

Example:

Ms. Jane Doe
5800 E Martin Luther King Blvd
Denver CO 80010

2.2.18 Address Types

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

2.2.19 Address Types Codes

Address Code	Code Description	Primary Use
AO	Purchase Order	Default address for Purchasing.
AP	Accounts Payable Remit	Use if AO address differs or no other address type exists.
BI	Billing Address	Banner Requirement.
BU	Business	
BX	Campus BOX Number	Default address for student mailings, excluding payroll checks.
CK	Payroll & W2 Address	Not Currently in Use.
EM	Emergency Address	Used in emergency contact processing only. This address type is not to be entered in Banner Address forms.
EO	Employee Office	
EX	Executor Address	For Financial Aid use only.
FA	Financial Aid	Financial Aid Tape Load.
HQ	Headquarters	
HS	High School Address	Used by the Athletic Department.
LL	Lost Address	Alumni/Advancement.
LO	Local Address(requires date range)	For students only when address differs from BX.
MA	Primary/Home/Mailing	Primary mailing address.
MW	UMW Business Remit (AP /Cashier's Office)	For the College Business Offices.
NW	Hometown Newspaper	Used for student publications.
P1	Parent Address 1	Used for student records.
P2	Parent Address 2	Used for student records.
P3	Parent Address 3	Used for student records.
P4	Parent Address 4	Used for student records.
PA	Parents Address (Tape load)	Alumni/Advancement.
PR	Permanent Address	Alumni/Advancement.
RH	Residence Hall	Used by Student Housing.
RT	Temporary Refund Address (requires a termination date)	For the Business Offices.
SE	Seasonal	
SP	Secondary Permanent	
ST	Short Term (requires date range)	Used by Admissions for prospective/applicants.
XX	Reserved for TGRFEED Use	
ZZ	SCHEV Reporting	

2.3 Procedures

2.3.1 Guidelines

Before changing an address, go to the GUASYST table to determine ownership then notify the appropriate office. The following table provides examples of ownership and rules:

Person Type	Guidelines
Student	The Registrar's Office may add a new address. The previous address should not be modified; however, it should be inactivated.
Faculty/Staff	The Human Resources Office may add a new address. The previous address should not be modified; however, it should be inactivated.
Alumni	The Alumni/Advancement Office may add a new address. The previous address should not be modified; however, it should be inactivated.
New Applicant	The Admissions Office will change the new applicant's address prior to the creation of the SGASTDN record. Once the SGASTDN record is created ownership defaults to the Registrar's Office.
Prospect Record	The Admissions Office and/or Athletics will change the prospective student record prior to the filing of an application for admission. Once the prospective student files an application for admission ownership defaults to the Office of Admissions.
Non-Person (Vendors)	
	The Accounts Payable Office may add or update an AP Vendor address. Contact AP at Payables @umw.edu for assistance.

2.3.2 Adding a New Address

To add a new address, follow these guidelines:

- Select “Insert Record” from the Options Menu and enter the ‘From’ date if the existing address is the same type as the “new” address. Either inactivate and maintain the old address; or, enter an ‘End’ date on the original address record.
- If you are entering another address type, select “Insert Record” from the Options Menu and enter the address. It is not necessary to enter an ‘End’ date on the original address record; however, you should enter a ‘From’ date on the new address record.

3 Telephone Numbers

3.1 General

An entity (person or non-person) may have multiple telephone numbers within the Banner System. Telephone numbers should be accurate and reflect the most recent data received. International phone numbers are entered in a special 'international' field in these forms of the Banner System: APATELE, FOATELE, PPATELE, RPATELE and SPATELE.

3.2 Standards

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

3.2.1 Telephone Type Codes

Address Code	Code Description
AO	Purchase Order
AP	Accounts Payable Remit
BI	Billing
BU	Business
CELL	Cell Phone
DY	Daytime Number
ED	Employee Directory
EMER	Emergency Contact
EX	Executor
FAX	Fax Number
HQ	Corporate Headquarters
HS	High School
LO	Local
MA	Primary/Home/Mailing
OF	Empl Department Phone
NW	Hometown Newspaper
P1	Parent 1
P2	Parent 2
P3	Parent 3
P4	Parent 4
PA	Parents
PR	Permanent
RH	Residence Hall
RT	Temporary Refund
SE	Seasonal
SP	Secondary Permanent
ST	Short Term
UN	Unknown
VS	Empl Direct Phone

3.2.2 Telephone Numbers

The telephone number is presented in a three-field format.

3.2.2.1 Area Code

The three-digit area code must be entered for all phone numbers including the local area.

3.2.2.2 Phone Number

Enter the seven-digit number **without** inserting a hyphen.

Example:

2837300

3.2.2.3 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

3.2.2.4 International Phone Numbers

International phone numbers consist of three parts.

"011" must be dialed when making international calls from the United States unless dialing to any country included in the *North American Numbering Plan*.

3.2.2.5 Country Code

The country code consists of one to four-digits and is required.

3.2.2.6 City Code

The city code consists of one to three-digits, but not all countries utilize city codes. The city code is often reported with a zero (0) in front of it. Do **NOT** enter the zero.

3.2.2.7 Phone Number

The phone number consists of four to seven digits and is required.

3.3 North American Numbering Plan (NANP)

This agreement, held among many North American countries (Mexico is not included), establishes a procedure for dialing international numbers in a way that is similar to traditional United States procedures (1 + the area code). The country code for all NANP countries is 1. The following countries are considered to be a part of the NANP and can be dialed using 1 + the three digit area code. Any phone numbers from NANP countries can be entered into the domestic phone number field in the Banner System.

Country	Area Code
Alberta	403, 780
Anguilla	264
Antigua	268
Bahamas	242
Barbados	246
Barbuda	268
Bermuda	441
British Columbia	250, 604, 778
British Virgin Islands	284
Cayman Islands	345
Dominica	767
Dominican Republic	809
Grenada	473
Guam	671
Jamaica	876
Manitoba	204
Montserrat	664
New Brunswick	506
Newfoundland	709
Northern Marianas Islands (Saipan, Rota and Tinian)	670
Nova Scotia	902
Ontario	226, 289, 416, 519, 613, 647, 705, 807, 905
Puerto Rico	787, 939
Quebec	418, 438, 450, 514, 819
Saskatchewan	306
St. Kitts/Nevis	869
St. Lucia	758
St. Vincent and Grenadines	784
Trinidad and Tobago	868
Turks and Caicos Islands	649
U.S. Virgin Islands	340
Yukon, NW Territory, Nunavut	867

3.4 Procedures

3.4.1 Adding New Records

Telephone numbers are generally linked to a specific address; however, it is possible to have more than one telephone number for a single address.

3.4.1.1 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.

3.4.1.2 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:

The Japanese phone number 8137599311 should be entered as follows:

81 for the country code, 03 for the city code and 7599311 for the actual phone number

4 E-Mail

4.1 General

A person may have multiple email addresses within the Banner System. If the person is a current student or employee the primary default email address will be their University (UE) address.

4.2 Standards

All email addresses entered should be evaluated for case sensitivity and spelling. Remember that the preferred indicator must be checked in order to extract the email address for use in mail merge communications. If the preferred indicator is not checked then the email address may be deleted when updating or adding a new email address.

4.2.1 E-Mail Address Type Codes

Code	Description
AE	Vendor Email Address
BU	Business Email Address
BW	Business Web Address
HM	Home Email
HS	High School Guidance
HW	Home Web Address
OC	Online Community Address
PE	Parent's Home
PR	Primary Email Contact
PW	Personal Web Address
RE	Responsible Party
AE	Purchase Order
SC	Secondary Email Contact
UE	University Email

4.3 Procedures

4.3.1 Adding an E-Mail Address

Be aware that email addresses follow a standard format. Email 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. For example, userid@umw.edu.

5 Calendar Dates

5.1 General

Dates are entered on a variety of screens for various purposes.

5.2 Standards

5.2.1 Calendar Dates

Dates can be entered in **mm-dd-yyyy** format. The System will display the date in the **dd-mm-yyyy** format.

5.2.2 Shortcuts

You may enter 'T' or any alpha letter in the date field and that day's date will appear.

6 Gender

6.1 General

The United States Department of Education requires that the University report gender information.

6.2 Standards

6.2.1 Gender Codes

Code	Description	Explanation
M	Male	A male person
F	Female	A female person
E	Entity	Vendor
U	Unknown	The gender information is not available

(NOTE: All employees and students **MUST** be classified either as a male or female).

7 Social Security Number

7.1 General

Great care should be used in the acquisition and storage of social security numbers. Although social security numbers are required for students and employees, individuals do have the right to refuse the University authorization to use their SSN. In that instance, an alternative number will be provided for them.

7.2 Standards

7.2.1 Social Security Number

Enter the entire 9-digit number, omitting dashes and spaces between numbers. Example: 555491133.

- The SSN is required for students and employees.
- The SSN is **not** required for constituents who are friends of the University.

7.3 Procedures

7.3.1 Changes to Social Security Number

Good professional judgment should be used when correcting social security numbers. A current student may request a social security number change by presenting their social security identification card to the Registrar's Office. New applicants or prospective students should provide written documentation to the Admissions Office in order to have their record corrected. Other University Offices should determine ownership of the record before making any changes.

8 Date of Birth

8.1 General

Dates can be entered in **mm-dd-yyyy** format. The System will display the date in the **dd-mm-yyyy** format. You may enter 'T' or any alpha letter in the date field and that day's date will appear.

8.2 Standards

8.2.1 Date of Birth

- The Date of Birth is required for employees and students.
- The Date of Birth is optional for alumni and friends.

8.2.2 Changes to Date of Birth

An employee requesting a change to their date of birth must present a copy of their birth certificate to the Human Resources Office. A current student requesting a change to their date of birth must present a copy of their birth certificate to the Registrar's Office. A prospective student or new applicant must submit a request to change their date of birth in writing to the Admissions Office.

8.3 Procedures

To allow processing when a birth date is required, but none is available, Human Resources and the Office of the Registrar will use the holder code date 07-07-1864. Periodically, records containing this date will be identified and corrected.

9 Marital Code

9.1 General

Individuals are not required to submit their marital status. The Banner System does allow for the storage of this information.

9.2 Standards

9.2.1 Marital Code

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

Marital Type Codes

Code	Description
0	Unknown Marital Status
D	Divorced
E	Deceased Spouse
L	Life Partner
M	Married
N	N/A (Organization or Company)
S	Single
W	Widowed
X	Separated

10 Ethnicity Code

10.1 General

Individuals may refuse to submit their ethnicity although the University requires it. In that case, the System default should be unknown (UN).

10.2 Standards

10.2.1 Ethnicity

This field **MUST** be entered for students and employees who are US citizens or US permanent residents. This field is optional for constituents who are friends of the University.

Ethnicity Type Codes

Code	Description
UN	Unknown
2	African-American, Black
3	Native American/Alaska Native
4	Asian/Pacific Islander
5	Hispanic or Latino
6	White, Non-Hispanic
10	Multi-Racial

11 Deceased Information

11.1 General

Due to the sensitivity of this issue, prompt attention is important so future mailings from University Offices are discontinued. Deceased status must be verified.

11.2 Standards

11.3 Procedures

For employees and retirees of the University, **ONLY** the Human Resources Office may enter and change this information based on prevailing policies.

For constituents (who are not students or employees), Alumni/ Advancement will enter and change this information based on prevailing policies.

For students the Registrar's Office will enter and change this information upon receipt of a death certificate.

12 Citizenship, Veteran and Legacy Information, Religion Code, Driver's License Information, Emergency Contact Information

12.1 General

The Banner System allows for the storage of this information. University policies may or may not require that an individual submit this information.

12.2 Standards

12.2.1 Citizen Type

If the person is an applicant, 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 that their citizenship is not known.

Citizen Type Codes

Code	Description
00	Unknown
11	Citizen (United States)
22	Resident Alien
33	Non-Resident Alien

12.2.2 Legacy Code

A Legacy Code identifies a relative or employee with whom the University had or has a relationship. For example, if your mother were an alumna of the University, your legacy would be Alumni relative.

12.2.3 Veteran File Number

The Office of the Registrar keeps and maintains this information for students. This information will not be collected or maintained by Human Resources or Alumni/Advancement.

12.2.4 Religion Code

The University will **NOT** collect or maintain religion data.

12.2.5 Driver's License Information

The University will **NOT** maintain driver's license data. Financial Aid will collect but not maintain this information.

12.2.6 Emergency Contact Information

Constituents may update this information on the web. Employees may update in SPAEMRG. Enter the priority number of the emergency contact (1-9) and the name, relation, address and phone number as specified by constituent. Then send a copy of your update information or changes to the Office of Human Resources.

13 Confidential Records

13.1 General

The Banner information system is an integrated database with information on constituents of all types – applicants, students, alumni, friends, employees, vendors, etc. Many benefits come from this integration. Personally identifiable information is made available to University employees for the sole and explicit purpose of allowing them to carry out their official University functions. Any other use is prohibited. The same principles of confidentiality that apply to paper records also apply to electronic data. It is the responsibility of each school official to understand his or her legal responsibilities under FERPA and other privacy regulations at the University of Mary Washington. Failure to adhere to privacy regulations can result in disciplinary action up to and including termination.

The Office of the Registrar administers FERPA for the University of Mary Washington. All inquiries regarding FERPA should be referred to:

Office of the Registrar
1301 College Avenue
Fredericksburg, VA 22401-5358
www.umw.edu/registrar

13.2 Standards

13.3 Procedures

13.3.1 Confidentiality Indicator

After a student or employee has filled out a “Request to Prevent Disclosure of Directory Information” form and submitted it to the Office of the Registrar or the Human Resources Office, depending on ownership the appropriate office will check the confidentiality indicator. When any information is accessed in the System about the student or employee, a warning will appear:

Warning: Information about this person is confidential.

Confidential will also appear in most forms accessed to alert faculty and staff that the student or employee does not wish to have personal information about them released.

13.3.2 Releasing Confidential Information

Releasing **any** information (including directory information) about a student or employee who has signed a “Request to Prevent Disclosure of Directory Information” should never occur. In the case of a student, the Office of the Registrar handles all requests for student information. Requests should be forwarded to the Registrar’s Office.

15 Appendix 1 – Nation Codes

The University of Mary Washington has adopted FIPS nation codes for the primary Banner code. Like other validation tables where historical information is required, codes may be added and descriptions changed. Codes may **not** be removed. Nation Codes should be taken from Federal Information Processing Standards (FIPS) Publication 10-4: COUNTRIES, DEPENDENCIES, AREAS OF SPECIAL SOVEREIGNTY AND THEIR PRINCIPAL ADMINISTRATIVE DIVISIONS. 1995 April (reflects technical changes through May 6, 1993), as amended. Purpose: Provides a list of the basic geopolitical entities in the world, together with the principal administrative divisions that comprise each entity. Each basic geopolitical entity is represented by a two-character, alphabetic country code. NOTE: Change notices for FIPS 10-4 are issued by the National Imagery and Mapping Agency (NIMA), and are available on NIMA's GEOnet Names Server (GNS) at: http://164.214.2.59/gns/html/fips_files.html

A useful summary of current countries may be found on NIMA's web page at:

http://164.214.2.59/gns/html/fips_10_digraphs.html

The International Organization for Standardization (ISO) publishes both two-character nation abbreviations (used for the EDI equivalents) and three-character codes (used for ISO code). These are taken from ISO standard 3166: CODES FOR THE REPRESENTATION OF NAMES OF COUNTRIES AND THEIR SUBDIVISIONS. The three-character (ISO) codes are promulgated by the United Nations and are available on the UN web site (United Nations Statistical Division, Country and Region Codes for Statistical Use):

<http://www.un.org/Depts/unsd/methods/m49.htm>

The two-character codes (EDI) are promulgated by the International Organization for Standardization (ISO) and are available on their web site:

<http://www.iso.org/iso/en/prods-services/iso3166ma/02iso-3166-code-lists/index.html>

Any questions, changes or additions should be forwarded to the Chair of the Data Standards committee.

16 Appendix 2 – State and Province Codes

Armed Forces

AA Armed Forces Americas
 AE Armed Forces Europe

AP Armed Forces Pacific

United States

AK Alaska
 AL Alabama
 AR Arkansas
 AZ Arizona
 CA California
 CO Colorado
 CT Connecticut
 DC District of Columbia
 DE Delaware
 FL Florida
 GA Georgia
 HI Hawaii
 IA Iowa
 ID Idaho
 IL Illinois
 IN Indiana
 KS Kansas
 KY Kentucky
 LA Louisiana
 MA Massachusetts
 MD Maryland
 ME Maine
 MI Michigan
 MN Minnesota
 MO Missouri
 MS Mississippi

MT Montana
 NC North Carolina
 ND North Dakota
 NE Nebraska
 NH New Hampshire
 NJ New Jersey
 NM New Mexico
 NV Nevada
 NY New York
 OH Ohio
 OK Oklahoma
 OR Oregon
 PA Pennsylvania
 RI Rhode Island
 SC South Carolina
 SD South Dakota
 TN Tennessee
 TX Texas
 UT Utah
 VA Virginia
 VT Vermont
 WA Washington
 WI Wisconsin
 WV West Virginia
 WY Wyoming

US Territories

AS American Samoa
 FM Federated States of Micronesia
 GU Guam
 MH Marshall Islands

MP Northern Mariana Islands
 PW Palau
 PR Puerto Rico
 VI US Virgin Islands

Canadian Provinces

AB Alberta
 BC British Columbia
 MB Manitoba
 NB New Brunswick
 NF Newfoundland & Labrador
 NT Northwest Territory

NS Nova Scotia
 ON Ontario
 PE Prince Edward Island
 OC Quebec
 SK Saskatchewan
 YT Yukon Territory

17 Appendix 3 – Special Character Set

An expanded set of allowed characters is available to insert into fields such as names, document titles, foreign institutions, etc. Characters such as é, ñ, á, and ç can be inserted.

To insert special characters hold down the ALT key and type the ASCII numeric code for the desired character. You must use the number keypad.

If you are entering special characters into a name field, you must enter both the plain (without special characters) name and the name with the special characters. Banner will not pull up names with special characters unless they are specifically entered in the search.

ASCII Numeric Characters (hold down ALT key)

À	0192	Ö	0214	ì	0236
Á	0193	×	0215	í	0237
Â	0194	Ø	0216	î	0238
Ã	0195	Ù	0217	ï	0239
Ä	0196	ƒ	0218	ð	0240
Å	0197	Ú	0219	ñ	0241
Æ	0198	Û	0220	ò	0242
Ç	0199	Ý	0221	ó	0243
È	0200	Þ	0222	ô	0244
É	0201	ß	0223	õ	0245
Ê	0202	à	0224	ö	0246
Ë	0203	á	0225	÷	0247
Ì	0204	â	0226	ø	0248
Í	0205	ã	0227	ù	0249
Î	0206	ä	0228	ú	0250
Ï	0207	å	0229	û	0251
Ð	0208	æ	0230	ü	0252
Ñ	0209	ç	0231	ý	0253
Ò	0210	è	0232	þ	0254
Ó	0211	é	0233	ÿ	0255
Ô	0212	ê	0234		
Õ	0213	ë	0235		

18 Appendix 4 – Prefixes

Sample Prefixes: Prefixes are generally used for constituents. Note: This list is not exhaustive. For non-listed prefixes, see the Abbreviation section of Webster's Dictionary.

Army Ranks

PVT	Buck Private	CWO3	Chief Warrant Officer 3
PV2	Private	CWO4	Chief Warrant Officer 4
PFC	Private First Class	CWO5	Chief Warrant Officer 5
SPC	Specialist	2LT	Second Lieutenant
SPC4	Specialist Grade 4	1LT	First Lieutenant
SGT	Sergeant	CPT	Captain
SSG	Staff Sergeant	MAJ	Major
SFC	Sergeant First Class	LTC	Lieutenant Colonel
MSG	Master Sergeant	COL	Colonel
1SG	First Sergeant	BG	Brigadier General
SGM	Staff Sergeant Major	MG	Major General
CSM	Command Sergeant Major	LTG	Lieutenant General
WO1	Warrant Officer	GEN	General
CWO2	Chief Warrant Officer 2		

Marine Corps Ranks

PVT	Private	CWO3	Chief Warrant Officer 3
PFC	Private First Class	CWO4	Chief Warrant Officer 4
LCPL	Lance Corporal	CWOS	Chief Warrant Officer 5
CPL	Corporal	2LT	Second Lieutenant
SGT	Sergeant	1LT	First Lieutenant
SSGT	Staff Sergeant	CAPT	Captain
GYSGT	Gunnery Sergeant	MAJ	Major
MSGT	Master Sergeant	LTCOL	Lieutenant Colonel
1STSGT	First Sergeant	COL	Colonel
MGYSGT	Master Gunnery Sergeant	BGEN	Brigadier General
SGTMAJ	Sergeant Major	MAJGEN	Major General
WO1	Warrant Officer	LTGEN	Lieutenant General
CWO2	Chief Warrant Officer 2	GEN	General

Navy Ranks

AA, FA, SA	AB	LCDR	CPT
AN, FN, SN	AMN	LT	MAJ
AR, FR, SR	A1C	LTJG	LTCOL
ADM	SRA	MCPO	COL
CAPT	SSgt	MCPON	BGEN
CDR	TSgt	P01	MAJGEN
CPO	MSgt	P02	LTGEN
CWO2	SMSgt	P03	GEN
CWO3	CMSgt	RADM	
CWO4	2dLt	SCPO	
ENS	1stLt	VADM	

18.1 Appendix 4 – Prefixes, Cont.

Other Prefixes

Ambassador	Amb.	Miss	Miss
Attorney	Att.	Mr.	Mr.
Bishop	Bishop	Mrs.	Mrs.
Chief Executive Officer	CEO	Miss or Madame	Ms.
Chief Financial Officer	CFO	Pastor	Pastor
Chief Operating Officer	COO	President	Pres.
Coach	Coach	Professor	Prof.
Dean	Dean	Rabbi	Rabbi
Delegate	Del.	Representative	Rep.
Director	Dir.	Reverend	Rev.
Doctor	Dr.	Reverend Doctor	Rev. Dr.
Executive	Exe.	Reverend Mrs.	Rev. Mrs.
Father	Fr.	Senator	Sen.
Governor	Gov.	Senior Vice President	Sr. VP
Honorable	Hon.	Sister	Sis.
Judge	Judge	The Doctors	The Drs.
Messrs.	Me.	Vice President	VP

19 Appendix 5 – Suffixes

Sample Suffixes: If a suffix is known, use the following guidelines. Note: This list is not an exhaustive list.

Description	Description
No Suffix	, C.L.U. Chartered Life Underwriter
, Jr. Junior	, C.P.A. Certified Public Accountant
II The Second	, P.E. Professional Engineer
III The Third	, Rltr. Realtor
IV The Fourth	, Co. Company
, Sr. Senior	, Fo. Foundation
, M.D. Doctor of Medicine	, Inc. Incorporated
, D. D. S. Doctor of Dental Science	, Ltd. Limited
, Esq. Esquire	, P.C. Professional Corporation
, USAF United States Air Force, Retired	, B.G. Brigadier General
, M.A. Master of Arts	, Capt. Captain
, M.F.A. Master of Fine Arts	, Lt.C. Lieutenant Colonel
, Litt.M. Master of Letters	, L.Cdr. Lieutenant Commander
, M.S. Master of Science	, USA United States Army
, Ph.D. Doctor of Philosophy	, USAF United States Air Force
, D.Lit. Doctor of Literature	, USN United States Navy
, D.Sc. Doctor of Science	, D.D. Doctor of Divinity
, Mus. D. Doctor of Music	, S.T.D. Doctor of Sacred Theology
, Ed.D. Doctor of Education	, O.S.F. Order of Saint Frances
, D.C.L. Doctor of Civil Law	, O.P. Order of Preachers
, L.H.D. Doctor of Humane Letters	The Drs. The Doctors
, D.F.A. Doctor of Fine Arts	(Retired) Retired
, L.L.D. Doctor of Laws	, Sr. Senior
, Litt.D. Doctor of Literature	, Sr., M.D. Senior, Medical Doctor
, Sc.D. Doctor of Science	V The Fifth
, D.M.D. Doctor of Medical Dentistry	IV, PH.D. The Fourth, Doctor of Philosophy
, D.O. Doctor of Osteopathy	, Jr., DMD Junior, Doctor of Dental Medicine
, D.P. Doctor of Podiatry	, Jr., J.D. Junior, Doctor of Juris Prudence
, D.V.M. Doctor of Veterinary Medicine	, Jr., LLB Junior, Bachelor of Laws
, O.D. Doctor of Optometry	, Jr., M.D. Junior, Medical Doctor
, J.D. Doctor of Juris Prudence	, Jr., Ph.D. Junior, Doctor of Philosophy
, L.L.B. Bachelor of Laws	, Jr. DDS Junior, Doctor of Dental Science
, C.F.P. Certified Financial Planner	, Rev. Reverend

20 Appendix 6 – Example of the GXVDUPS Report

21 Appendix 7 – Multiple PIDM Resolution Form