



## Banner Data Standards And Guidelines

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## 1. Purpose and Scope of this Document

The purpose of this document is to define a set of data standards for users of the Banner system at Worcester Polytechnic Institute (WPI). Data standards consist of prescriptions and guidelines that regulate the entry and maintenance of data. Such standards are especially important in a shared database environment like Banner, where the data created by people in Department A is frequently read and used by people in Department B. The principal goals of this document and the standards it describes are as follows:

- To provide and maintain consistency within the Banner database, specifically as this relates to naming standards for people, vendors, and outside organizations address standards telephone number standards.
- To avoid the creation of duplicate records in the Banner database.
- To facilitate accurate searches for data.
- To facilitate the generation of accurate and consistent reports.
- To define policies and protocols for data entry and maintenance.
- This document is kept under version and configuration control by Information Resources and Services (IRS). To request changes, submit your requests through the ISAR system.

## 2. General Rules for Clean and Accurate Entity Records

Throughout this document, the word 'entity' is used as a blanket term for person (student or employee), vendor, or organization.

There are three general rules for creating clean entity records in Banner. These three rules are as follows:

- General Rule 1: Search first.
  - Before you create a new record for an entity, conduct an ID and name search to ensure that the entity in question does not already exist in the Banner database. If the entity does exist, do not create a new record because this will create a duplicate record for the same entity. Searching procedures are described in the Appendix A of this document.
- General Rule 2: Enter and modify data only when authorized to do so.
  - Make changes to data only when you have the proper authority. Built-in Banner security does not cover all circumstances, and it cannot prevent all inappropriate changes to data. For example, Banner security can control who can modify addresses. For business reasons, however, specific address types require specific guidelines regarding who can update addresses of those types. Data entry policies and protocols are described in Section 7 of this document.
- General Rule 3: Follow the data entry rules.
  - Many key data fields have specific data entry rules that govern the use of punctuation; abbreviations of words; the use of uppercase versus lowercase letters of the alphabet; the correct formulation of addresses; and so on. These rules are described in Sections 3 through 6 of this document.

### 3. Entity Guidelines and Standards

The following guidelines are to be followed by all departments that enter entity information into the Banner system.

#### *3.1 BANNER IDENTIFICATION NUMBERS (BANNER IDS)*

A complete search must be done before entering a new entity into Banner. If the same entity is mistakenly entered into Banner more than once, Banner will generate multiple internal identifiers (PIDMs) for that entity. These multiple PIDMs can cause serious anomalies in information processing, and this situation is typically difficult and time-consuming to fix.

A complete search might take a few minutes to perform up front, but fixing a multiple PIDM situation can take several days or weeks. Refer to Appendix A for information on how to conduct a search by ID or name.

Also, when you enter a new entity into Banner, do not create the Banner ID manually. Let Banner generate the ID automatically. Banner-generated IDs are 9-digit numbers. These will not begin with zeroes or nines.

Please be aware when searching by Banner ID, that there are many Alternative ID's listed in SPAIDEN.

#### *3.2. SOCIAL SECURITY NUMBERS*

A person's Banner ID is not his or her social security number; but you should enter each person's social security number in the General Person Form (SPAIDEN or PPAIDEN), unless the person refuses to give it out or it is not appropriate to ask for it.

Social security numbers are required for the following classes of people:

- Employees
- Registered students (required for 1098T- IRS reporting for potential educational tax credits)
- Financial Aid applicants and recipients

#### *3.3. ELECTRONIC LOAN LENDERS, GUARANTORS OR SERVICERS*

Electronic Loan Lenders must be set up with a 6-digit number assigned by NCHELP. Guarantors or Servicers have a 3-digit number assigned by NCHELP. The ID may not be padded with either leading or trailing zeroes. It must be the current ID and not a previous ID. This ID should not be used as a vendor ID. For example, if Citibank is both a vendor and a lender for student loan processing, there will be two Citibanks in Banner—Citibank the vendor and Citibank the lender.

Each of the lender non-person names should end with (FA) to distinguish them clearly from vendors.

Lenders, guarantors, and servicers should be entered into Banner only by the Financial Aid Office.

## 3.4. NAME STANDARDS

### 3.4.1. Last Names

Enter all last names in mixed case (standard combination of upper and lower case letters). Enter the legal spelling and format of the last name as it appears on the person's legal documentation (for people).

#### Acceptable Forms of Documentation:

Marriage Certificate  
Social Security Card  
Court Documentation  
Official Passport documentation

Note: For international entities please contact the Director of International Students and Scholars for specific documents that will satisfy the requirement.

Avoid the use of punctuation characters. Avoid the use of other special characters unless the legal spelling of the name includes them. The following characters are permitted if the legal spelling of the name includes them:

Character Examples  
[Space] Van der Linder  
Mac Phearson  
Lopez Garcia  
[Apostrophe] O'Bryan  
D'Angelo  
[Hyphen] Jones-Smith

Always observe the following restrictions:

- Do not include periods in last names. For example, if a person's last name is St James, enter 'St James', not 'St. James', regardless of what appears on the person's Social Security card.
- Do not enter titles, prefixes, and suffixes in the Last Name field. Banner provides separate fields for prefixes and suffixes. Use them. And never enter 'Jr', 'Sr', 'II' or 'III' in the Last-Name field.
- Never include an octothorp (#), a percent sign (%), or an ampersand (&) in a name field, or any other data field. These characters can generate Oracle database errors.

Note: If you are entering a new person into Banner and that person has a previous name (e.g., a maiden name) that he or she wants to have recorded, do the following:

- Enter the previous name into the system and commit the record.
- Change the name using Banner's name change procedure on the SPAIDEN or PPAIDEN form.

(See [Section 3.4.6](#) below for more information on previous names and other special name types.)

If the person has no last name, enter a period in the Last Name field. This will satisfy the Banner system requirement for a non-NULL last name. Note: This is the only circumstance in which a period should appear in the Last Name field.

Non-person names (e.g., vendor names) are entered into the vendor input form FTMVEND. These names use the same database field as person last names. Therefore, they should follow the same rules as those just described for Last Name. See Section 4 for more information.

### *3.4.2. First Names*

Enter all first names in mixed case (standard combination of upper and lower case letters). Enter the legal spelling and format of the person's first name as it appears on his or her Social Security card. If multiple forms of the name are provided on paper forms, assume that the more formal name is the legal name and the informal one is the 'preferred name'. If the first name is too long to fit in the 15-character field that Banner provides, enter as many letters as possible. (See Section 3.4.6.1 below for more information about preferred names.)

If the person has no first name, enter a period in the First Name field. This will satisfy the Banner system requirement for a non-NULL first name. Note: This is the only circumstance in which a period should appear in the First Name field.

Enter single-character first names as single uppercase characters. Do not follow the single character with a period.

If a person has a single-character first name and a multiple-character middle name, enter the single character in the First Name field and the middle name in the Middle Name field. Do not combine them in the First Name field. For example, if a person's legal name is W Peter Smith, enter the letter 'W' into First Name field and 'Peter' in the Middle Name field. Do not enter 'W Peter' in the First Name field.

If a person's legal first name consists of two or more initials, enter the uppercase letters with no period(s) or space(s) separating them, as in

Last Name First Name

Ewing JR

Wilson TJ

The following characters are permitted if the legal spelling of the name includes them:

Permitted Character Examples

[Space] Jo Ann

Billy Bob

[Apostrophe] D'Antonio

D'Wayne

[Hyphen] Marie-Louise

Always observe the following restrictions:

- Do not include periods in first names, regardless of what appears on the person's Social Security card unless the person does not have a first name.
- Do not enter titles, prefixes, and suffixes in the First Name field. Use the fields labeled Title, Prefix, and Suffix, respectively.

- Never include an octothorp (#), a percent sign (%), or an ampersand (&) because these characters can generate Oracle database errors.

### 3.4.3. Middle Names

Enter middle names in mixed case (standard combination of upper and lower case letters). Enter the legal middle name in full as supplied by the person—as appears on the person’s Social Security card.

If the legal name contains only a middle initial, enter the initial in uppercase. Do not follow it with a period.

If the person’s full legal name contains no middle name, leave the Middle Name field blank.

If the middle name is too long to fit in the 15-character field, enter as many characters as possible.

Spaces, apostrophes, and hyphens are permitted if the legal spelling of the name includes them. See the preceding section, under First Names.

### 3.4.4. Prefixes

Prefixes are optional. When they are used, enter them in mixed case (standard combination of uppercase and lowercase letters). Enter prefixes in the Prefix field that Banner provides, not in the First Name, Middle Name, or Last Name field.

For females, the normal prefix should be ‘Ms’ (with no period after ‘Ms’). However, if the person specifically requests to be known as ‘Miss’ or ‘Mrs’, these forms are acceptable. The preference is to use the abbreviated form of the prefix, but full titles may be used in special circumstances (for example, ‘Her Majesty’ or ‘The Right Honorable’).

Do not include periods in the abbreviated form of a prefix.

Below are examples of the more commonly used prefixes and their recommended abbreviations.

Full Form Abbreviated Form Notes

Brother (of the Church) Bro

Captain Capt

Colonel Col

Commander Cmdr

Commanding Officer CO

Commissioner Comm

Constable Cst

Corporal Cpl

Doctor Dr

Ensign Ens

Father (of the Church) Fr

First Lieutenant 1st Lt Include a space

General Gen

Honorable Hon  
Inspector Insp  
Lieutenant Lt  
Lieutenant Colonel Lt Col Include a space  
Lieutenant Commander Lt Cmdr Include a space  
Lieutenant Junior Grade LTJG No space  
Major Maj  
Miss Miss  
Missus Mrs  
Miss or Missus Ms  
Mister Mr  
Master Sergeant MSGT All uppercase  
Monsignor Msgr  
Reverend Rev  
Second Lieutenant 2nd Lt Include a space  
Sergeant Sgt Mixed case  
Sergeant First Class SFC All uppercase  
Sister (of the Church) Sr  
Staff Sergeant SSGT All uppercase

If you believe additional prefixes and abbreviations should be added to this list, submit an agenda item to the Data Stewardship Working Group. If the change is approved, this document will be revised and redistributed.

#### *3.4.5. Suffixes*

Like prefixes, suffixes are optional. When they are used, enter them in mixed case (standard combination of uppercase and lowercase letters). Enter suffixes in the Suffix field that Banner provides, not in the First Name, Middle Name, or Last Name field. Note that suffixes are not included on printed payroll checks and tax reports. Do not include punctuation (e.g., periods) within suffixes. There is currently a trigger on the suffix tables that format the suffix. Will need to look at the trigger once a technical solution is implemented.

Both a prefix and a suffix can be used for individuals who

- are in the military
- are retired military
- are members of religious orders
- have professional or academic degrees.
  - Prefix First Name Last Name Suffix
  - Gen John Smith USMC
  - Fr Timothy O'Toole SJ
  - Dr Jane Doe PhD
  - Dr Mary Roe MD

Below are examples of commonly used suffixes and recommended abbreviations.

Full Form Abbreviated Form Notes

Certified Fund Raising Executive CFRE All uppercase

Certified Public Accountant CPA All uppercase  
Doctor of Chiropractic DC All uppercase  
Doctor of Divinity DD All uppercase  
Doctor of Dental Surgery DDS All uppercase  
Doctor of Dental Medicine DMD All uppercase  
Doctor of Education EdD Mixed case, no spaces  
Doctor of Laws LLD All uppercase  
Doctor of Medicine MD All uppercase  
Doctor of Optometry OD All uppercase  
Doctor of Osteopathic Medicine DO All uppercase  
Doctor of Philosophy PhD Mixed case, no spaces  
Doctor of Veterinary Medicine DVM All uppercase  
Esquire Esq  
The Second II Roman numeral  
The Third III Roman numeral  
The Fourth IV Roman numeral  
Incorporated Inc  
Juris Doctor JD All uppercase  
Junior Jr  
Licensed Practical Nurse LPN All uppercase  
Limited Ltd  
Retired Ret  
Registered Nurse RN All uppercase  
Registered Nurse Clinician RNC All uppercase  
Senior Sr  
Society of Jesus SJ All uppercase  
United States Air Force USAF  
United States Army USA  
United States Coast Guard USCG  
United States Marine Corps USMC  
United States Navy USN

If you believe additional suffixes and abbreviations should be added to this list, submit an agenda item to the Data Stewardship Working Group. If the change is approved, this document will be revised and redistributed.

#### *3.4.6. Name Types*

Current names should not be associated with a name type and should be the person's current legal name. Previous or alternate names should be associated with the appropriate name type. The following table shows the possible name types and their descriptions.

#### Description/ Abbreviation

DOCM – Documented  
UNDC – Undocumented

#### 3.4.6.1. Preferred First Name (Optional).

Banner also supports the concept of preferred names. If a person's preferred first name differs from his or her legal first name, enter it into the Preferred First Name field. For example, if a person's legal name is Christopher Paul Jackson but he prefers to be called Lefty, enter 'Lefty' into the Preferred First Name field. (If a person enters a nickname on one paper form and a formal name on another, it can be assumed that the nickname is the preferred name.) As with first, middle, and last names, enter preferred names in mixed case (standard combination of upper and lower case letters). Enter the spelling and format of the preferred first name as supplied to you by the person. If no preferred name is given, leave the Preferred First Name field blank.

#### 3.4.6.2. Legal Name (Optional).

The Legal Name field is currently being used for enrolled students. The legal name is not being used for other entities unless specified by the person or there is a need for clarification. Each person's legal name should be housed in the First, Middle, and Last Name fields.

#### 3.4.6.3. Deceased Persons.

If the person is deceased check the 'Deceased Indicator' checkbox in SPAPERS. Insert the date of death into the "Deceased Date" field. See section 7.6 for more information. **Do not use the word "Deceased" in the last name field.** The standards for who has the permission to change this indicator is outlined the in Personal Identification Information Policy.

### 3.5. GENDER INFORMATION

Gender information is stored in Banner with the standard codes, 'F' for female and 'M' for male. This information is not required by Banner, but you should make every effort to obtain and enter it because it is needed to satisfy a number of reporting requirements for the College.

### 3.6. CITIZENSHIP INFORMATION INDICATOR

The valid codes and their corresponding descriptions are listed in the following table:

Code	Description
D	Dual Citizen
N	Non-Citizen
P	Legal Permanent Resident of US
Y	US Citizen

### *3.7. RACE AND ETHNICITY GROUP INFORMATION*

#### *3.7.1 Ethnicity:*

A person is not required to answer the question “Are you Hispanic or Latino”. If they do, they respond either “Yes” or “No”.

Only check the “Ethnicity and Race Confirmed Indicator” and “Confirm Date” if this information has been provided by the person and insert the date the information was provided.

#### *3.7.2 Race*

Race Code Description

1	White
2	Black
5	American Indian
A	Asian
N	Native Hawaiian, Other Pacific Islander

### *3.8. HOME CAMPUS INFORMATION FOR EMPLOYEES*

Enter a home campus code for every employee (full-time or part-time). This input is required to support several reporting requirements within the College. The field for this input is in PEAEMPL, under Hiring Location Information. This field will accept only one value per employee. If an employee performs work at more than one campus, select the campus at which she spends the majority of her time.

This field must also be maintained. It is important to ensure that this field is updated if an employee is transferred from one campus address to another.

### *3.9. CONFIDENTIALITY INDICATOR*

The confidentiality indicator appears as a checkbox on the input form. If the box is checked, none of the person’s personal information will be released, except as required by law. Leave the box unchecked unless the student requests to have it checked.

In creating non-student employees, this box should always be checked.

## **4. Non-Person Guidelines and Standards**

### **4.1. VENDOR AND OTHER NON-PERSON NAMES**

For the legal spelling of the business name use the name as it appears on the business license (for businesses). If the name does not fit in the field that Banner provides, enter as many characters as possible.

Vendor and other non-person names should be spelled out in their entirety if possible. The name should be entered as it appears on the Form W9. If the D/B/A is provided on the W9, the D/B/A should be entered as the company name. Be sure to enter the tax ID. For attorneys, this would be entered as using the name of the individual with Atty in the Prefix.

Banner actually stores these names in the Last Name field used for persons. There is room for sixty (60) characters in this field. If the name contains more than sixty characters, abbreviate the following key words as indicated below.

Do not include periods in any of these abbreviations.

Description Abbreviation

Association Assn

Attention Attn

Attorney Atty

Center or Centre Ctr

Company Co

Corporate Corp

Corporation Corp

County Cnty

Department Dept

District Dist

Division Div

Engineering Engrg

Engineers Engrs

Government Govt

Incorporated Inc

International Intl

Limited Ltd

Management Mgmt

Manufacturing Mfg

Organization Org

Representative Rep

Service Svc

Services Svcs

If you believe additional abbreviations should be added to this list, submit an ISAR to the Data Stewardship Working Group. If the change is approved, this document will be revised and redistributed.

## 4.2. ACRONYMS

Use acronyms for the names of companies that are commonly recognized by the acronyms—for example, ABC for American Broadcasting Corporation, IBM for International Business Machines, NCR for National Cash Register Corporation, or if provided on the W9.

### 4.3. PUNCTUATION

Do not use punctuation in a company name unless the punctuation is an integral part of the name, as in Amazon.com or Raytheon International, Inc.

### 4.4. DEFINITE ARTICLES

Use the definite article 'the' if and only if it is part of the entity's legal name. For example, the Boeing Company should be entered as 'The Boeing Co[mpany]', but the Eastman Kodak Company should be entered simply as 'Eastman Kodak Co[mpany]'.

### 4.5. SPECIAL CHARACTERS

As with person names, do not include an octothorp (#), percent sign (%), or ampersand (&) in any data field because these characters can cause Oracle database errors.

### 4.6. CITIES, STATES, COLLEGES, ETC.

Follow the conventions in the table below for denoting cities, states, colleges, universities, and government agencies. These are in-house, WPI standards.

Entity Name [WPI Standard]

United States US

Individual states - Use the standard two-character abbreviation

Individual counties - Spell out the name

Individual cities/towns - Spell out the name

United States Postal Service - USPS

Arizona State University - ASU

Worcester Polytechnic Institute -WPI, if the data is for internal use; otherwise spell out the name

Northern Arizona University - NAU

University of Arizona - UA

University of California at Los Angeles - UCLA

University of Southern California - USC

All other colleges and universities - Spell out the complete name

If you believe additional items should be added to this list, please send a request to the Data Stewardship Working Group (DSWG). If the change is approved, this document will be revised and redistributed.

## 5. Address Standards

### 5.1. ADDRESS TYPES

Multiple addresses can be entered for a person or vendor by using different address types. Each address type is identified by an address type code. Address types are defined in the Banner validation table STVATYP. There are currently thirty-five address types in use at WPI. They are enumerated in the following table.

Address Type Code Description

Addr_Type_Code	STVATYP_DESC	STANDARD USE
AG	Agency Address	Finance - Agency addresses used for Sponsored Research proposals and funds
AP	Accounts Payable	Finance Used for AP checks and 1099's
B2	Business address #2	Alumni and Development - Second business address if BU is also active
B3	Business address #3	Alumni and Development Third business address if BU and B2 is also active
BI	Billing	Finance - Billing Address and fourth choice on 1098T
BU	Business	A&D - The Business address for all person constituent.  Student - Used for Graduate Students.  Finance - Use for 1098 T sixth back up.  School of Business - Will be loading Business Addresses of Applicants  CPE - Will be loading Business Addresses of Applicants
EM	Emergency - Records exist in SPREMRG	EM is used by ConnectED.. If an individual complete the Emergency Contact info on Self-Service, this screen may be populated.
GF	Gift Receipt (Advancement)	A&D - alternate corporate address for gift receipt purposes
GU	Guardian	Student - Rarely, but for students that have guardians it is used.
HB	Historical Business Address	A&D - not used any longer, legacy info only

HR	Historical Residence Address	A&D - not used any longer, legacy info only
IN	International House use ONLY	Student Affairs - SEVIS
LO	Local Mailing	<p>HR - Second for W-2</p> <p>Student - Local Address for students enrolled at WPI sometimes</p> <p>Student Affairs - Local Address for students enrolled at WPI sometimes</p> <p>Finance - second choice for billing and second choice for 1098T</p> <p>Undergraduate Admissions - Current Mailing Address for Recruits</p> <p>Graduate Admissions - Current Mailing Address for Recruits</p> <p>CPE - used in mailing hierarchy</p> <p>FA - Third Choice in Hierarchy</p> <p>Marketing - In hierarchy for News Releases</p>
MG	Matching Gift Form - Corporate	A&D - Corporate, ,Foundation, Other Organizations Constituents
MA	General Mailing	<p>A&amp;D - main corporate addresses for organizational constituents</p> <p>CPE - in mailing hierarchy</p>
P2	Parent (secondary)	<p>Student - Non-Custodial Parent Address</p> <p>Finance - 1098T - in addition to those addresses already covered, Finance uses P2 as the 5th address selection</p>
PA	Parent (primary)	<p>Student - Used for mailings to the custodial parents. Grade Mailers, Academic Status Letters, President Office Mailings to Parents Etc.</p> <p>Student Affairs - Mailing for Parents Weekend, Commencement Mailings</p> <p>Finance - Third Address choice for 1098T's</p> <p>Undergrad Admissions - Applicants' custodial parents address</p>

PA (cont)		FA - Used in Award Letter mailings
		Marketing - News Releases to T&G and Home Town Newspapers.
PO	Purchase Order	Finance
PR	Permanent Residence	<p>A&amp;D - Primary Residence for all person constituents</p> <p>HR - Permanent Address where specific compliance information is mailed.</p> <p>Student - Permanent (Legal)address for students.</p> <p>Student Affairs - Permanent address</p> <p>Finance - Primary for 1098 T and used as the third back up for the billing address</p> <p>Undergrad Admissions - Reported Permanent address and the current mailing address used simultaneously using from and to dates for address.</p> <p>Graduate Admissions - Reported Permanent address.</p> <p>CPE - Permanent Address</p> <p>FA - Permanent Address</p> <p>Marketing - Permanent Address</p>
S1	Seasonal Address #1	A&D - Seasonal Address for person constituent
S2	Seasonal Address #2	A&D - Seasonal Address for person constituent
SC	School/Campus	HR - Faculty and Staff Directory for on campus locations
TB	Temporary business #1	A&D - Temporary Business - seldom used - LZ to verify perhaps inactivate
TR	Temporary residence #1	A&D - Temporary Business - seldom used - LZ to verify perhaps inactivate
WW	World Wide Web	A&D - no longer used but addresses in database
XX	Confidential	A&D - no longer used but addresses in database

Human Resources uses the 'PR' address for all mailings and the 'SC' address for directory information. Payroll uses the 'LO' address for international students' mailings instead of the 'PR' address.

Some address types are intended for mailing, and some are not. Those that are intended for mailing must conform to USPS requirements. The standards described below are consistent with these requirements.

If you believe additional items should be added to this list, please send a request to the Data Stewardship Working Group (DSWG). If the change is approved, this document will be revised and redistributed.

## 5.2. STREET ADDRESSES

### 5.2.1. General Rules and Guidelines

#### 5.2.1.1. Punctuation.

Punctuation should not be used in street addresses unless it is absolutely necessary.

Use slashes and hyphens only when needed, as in Suite 123-B and 456 1/2 Any St, where '1/2' stands for 'and one half'.

Never use apostrophes.

For the ordinal designation of streets and avenues, use the numeric representation followed by the standard 'st', 'nd', 'rd', or 'th', as in 41st St, 22nd Ave, 33rd Ct, and 44th St.

#### 5.2.1.2. Special Characters.

Avoid the use of special characters. In particular, avoid the octothorp (#), the percent sign (%), (@) and the ampersand (&) because these characters can cause Oracle database errors. The @ sign should only be used in email addresses.

#### 5.2.1.3. Abbreviations.

Use abbreviations from the table below for address elements. These are consistent with USPS standards.

If a standard abbreviation is available, use it. Do not spell out the entire word.

Never follow an abbreviation with a period.

#### Address Element Abbreviation

Apartment Apt  
Arcade Arc  
Avenue Ave  
Boulevard Blvd  
Bottom Btm  
Building Bldg  
Center Ctr

Circle Cir  
Court Ct  
Courts Cts  
Department Dept  
Drive Dr  
East, North, South, West E, N, S, W, respectively  
Expressway Expwy  
Floor Fl  
Heights Hts  
Highway Hwy  
In care of c/o  
Island Is  
Junction Jct  
Lane Ln  
Loop Lp  
Mail-Stop (the phrase 'mail stop') MS  
Mountain Mtn  
Number (the word 'number') No  
Parkway Pkwy  
Post Office Box PO[space]Box  
Road Rd  
Room Rm  
Route Rte  
Station Sta  
Street St  
Terrace Ter  
Trail Tr  
Turnpike Tpke

If an apparent compass direction is actually the name of a street or avenue, spell it out. For example, North Avenue in Chicago should be entered as 'North Ave', not 'N Ave'. Denote combinations of compass directions by combinations of the corresponding abbreviations—for example, use 'NE' and 'NW' for 'Northeast' and 'Northwest'. But again, if one of these directional terms is the name, or part of the name, of something, spell it out. For example, if the name of a road is Shoreline, denote Southwest Shoreline as 'SW Shoreline Rd', but if the name of the road itself is Southwest Shoreline, denote it as 'Southwest Shoreline Rd'.

Address elements that do not appear in this list—'Annex', 'Bayou', 'Knoll', etc.—should not be abbreviated. Spell them out, except in rare cases in which abbreviation is necessary to conserve space.

If you believe additional items should be added to the above list, submit a request to DSWG. If the change is approved, this document will be revised and redistributed.

Note: In a street address, do not abbreviate the word 'Saint' as 'St' in street addresses because 'St' is the standard abbreviation for 'Street'. The following example is correct:

Line 1 1234 Saint Thomas St  
Line 2 [unused]

Line 3 [unused]

The following example is confusing and incorrect:

Line 1 1234 St Thomas St  
Line 2 [unused]  
Line 3 [unused]

#### **5.2.1.4. Address Lines:**

Banner provides three fields (or 'lines') for street addresses. These are commonly referred to as Street Line 1, Street Line 2, and Street Line 3, respectively. The specific way in which these fields should be used can differ, depending upon the address type.

#### **5.2.2. Rules and Guidelines for Specific Address Types**

This subsection describes the rules and guidelines for forming the street addresses for specific types of addresses.

##### **5.2.2.1. Addresses Intended for Mailing**

For most mailing addresses, Street Line 1 is used for the street number, and Street Line 2 and Street Line 3 are unused, as in

Line 1 1232 45th St  
Line 2 [unused]  
Line 3 [unused]

In this scenario, the designation for a building, unit, or apartment, if there is one, should also be entered into Line 1, after the street number with no comma separating it, as in

Line 1 1232 45th St Apt G-3  
Line 2 [unused]  
Line 3 [unused]

If the address contains both a street number and a PO Box, the Box number is the primary delivery information. Enter it into Line 2.

Line 1 1232 45th St  
Line 2 PO Box 9876  
Line 3 [unused]

To maintain consistency with USPS standards, think of an address as being read from bottom to top.

In some cases, it is not practical to use Street Line 1 for the street number. For example, you might need to use it for the name of a company or department if the mail is going to an individual but is addressed to a large business.

Line 1 Sales Department  
Line 2 Ace Computer Corp  
Line 3 2335 Renowned Pkwy

You might even need to combine the 'street number' with additional information in some cases, for example

Line 1 Sales Department  
Line 2 Ace Computer Corp  
Line 3 2335 Renowned Pkwy MS D17

Note that in the last two examples, the name of the company comes after the name of the department. As stated above, according to USPS standards, addresses are read from bottom to top. Use as many of Lines 1 through 3 as you need to enter the complete address.

Always start with Street Line 1.

Enter the street number into Line 1 when possible.

Avoid the use of special characters. Be especially careful not to use the octothorp (#) as an abbreviation for 'Number'. Use 'No' instead.

Do not enter city, county, or state information in any of the Street Line fields.

Never leave a line blank if one of the following lines has data in it. For example, never do something like this:

Line 1 [unused]  
Line 2 1232 45th St Apt G-3  
Line 3 PO Box 123

The following example is also unacceptable:

Line 1 1232 45th St Apt G-3  
Line 2 [unused]  
Line 3 PO Box 123

Each street line field in Banner holds a maximum of 30 characters. Do not attempt to place two pieces of delivery information in a single field if the combined length is greater than 30 characters.

#### ***5.2.2.2. Residential Addresses (LO Address Type)***

Residential addresses are used for mailing for student mail boxes, but they must follow some special formatting rules that do not apply to ordinary mailing addresses. The rules for entering residence life addresses are as follows:

For Street Line 1, enter 'WPI Box 123.

For Street Line 2, enter Worcester Polytechnic Institute

For Street Line 3, enter the street number '100 Institute Rd (with no period after 'Rd').

Follow the general rules set forth in Section 5.1 above.

### 5.2.2.3. Campus Addresses (type code 'SC').

Campus addresses are not intended for mailing, and they should never be given to an outside third party as mailing addresses. They are used only internally, as a source of information for generating the campus telephone and office directories from Banner.

Note: Create campus addresses only for people who have an office location on a campus. The office location does not need to be a private office, only a room where the person keeps a desk, some papers, and a few tattered books. If a person does not have an office location, do not create a campus address for that person.

The rules for entering campus addresses are as follows:

For Street Line 1, enter the building location (i.e. Boynton Hall Room 123). If there is no room number, type in the floor (FL2)

For Street Line 2, enter the street address – i.e. 100 Institute Rd, 85 Prescott St, 60 Prescott St

## 5.3. STANDARDS FOR CITY NAMES

### 5.3.1. US and Canadian Addresses

Enter all information in mixed case (standard combination of upper and lower case letters) and avoid special characters. Do not abbreviate city names like 'Saint Paul' and 'Saint Joseph' unless you are limited by space. If an abbreviation is necessary, do not follow it with a period.

Do not enter Canadian province information into the City field. Canadian provinces have their own codes for data entry into the State field.

### 5.3.2. Non-Canadian International Addresses

See Section 5.8.2 for a complete summary of standards for non-Canadian international addresses.

## 5.4. STANDARDS FOR STATE INFORMATION

For US and Canadian addresses, the state component of an address is entered into Banner as a state code ('AK' for Alaska, 'AL' for Alabama, etc.). If you do not remember the code for a particular state, you can select it from a pick list. The pick list is populated with values from the state validation table STVSTAT. Canadian provinces are incorporated into the address in the same manner, from the same source. The individuals who maintain STVSTAT must ensure that the information for US states and Canadian provinces is accurate in STVSTAT.

The codes for Canadian provinces are shown in the following table: Need to update STVSTAT for changes below:

Province Code Province Name

AB	Alberta
----	---------

BC	British Columbia
MB	Manitoba
NB	New Brunswick
NF	Newfoundland
NS	Nova Scotia
NT	Northwest Territories
NU	Nunavut – add to STVSTAT
ON	Ontario
PE	Prince Edward Island
QC	Quebec
SK	Saskatchewan
YT	Yukon Territory

For state information in non-Canadian international addresses and overseas military addresses, see Sections 5.8 and 5.7, respectively.

## 5.5. STANDARDS FOR COUNTRY INFORMATION

Like the state component, the country component of an address is entered into Banner as a code. As with state codes, you can select country codes from a pick list.

This pick list is populated with values from the country validation table STVNATN. The individuals who maintain STVNATN must ensure that the values in this table are accurate and that they support the operations of the College.

**PLEASE NOTE: Do not select a country code for US addresses. If this field is left blank, the programs that read this information will assume that the address is in the US.**

For Canadian addresses, the country code for Canada (CA) must be specified.

## 5.6. STANDARDS FOR ZIP CODES

Zip codes are required for all United States and Canadian addresses, even though Canadians call them ‘postal codes’ rather than ‘ZIP codes’.

### 5.6.1. US Addresses

For US addresses, enter at least the 5-digit ZIP code. If you enter the 9-digit ZIP code, place a hyphen between digits 5 and 6. Also, note the following:

Most internally generated reports ignore digits 6 through 9 of the ZIP code if they are present.

If the full 9 digits are entered, Banner will not automatically fill in the City, State, and County fields.

To enter a 9-digit ZIP code, proceed as follows: Enter the first 5 digits of the ZIP code, then tab out of the ZIP Code field. Banner will use the 5-digit value to supply the city, state, and county. Then, if desired, return to the ZIP Code field and add the hyphen and last 4 digits. (You should visually verify that the correct city, county, and

state have been selected.) If you enter a zip code that will bring back more than one city, an error message appears at the bottom of the screen (very hard to see!) that warns that multiple cities exist. You will have to either choose from the zip code list or type it in yourself.

### 5.6.2. Canadian Addresses

For Canadian addresses, enter the six-character postal code by keying in three characters, a space, and the last three characters. For example: T2T 2Y5.

See [Section 5.8.2](#) below for postal codes in non-Canadian international addresses.

## 5.7. MILITARY ADDRESSES

### 5.7.1. Overseas Locations

In an overseas military address, the APO (Army/Air force post office) or FPO (fleet post office) takes the place of a city name. Enter the APO or FPO code into the City field.

Enter either 'AE', 'AP', or 'AA' in the State field. These designations have the following meanings:

AE (ZIP Codes 090xx-098xx) designates Armed Forces in Europe, the Middle East, and Africa.

AP (ZIP Codes 962xx-966xx) designates Armed Forces in the Pacific.

AA (ZIP Code 340xx) designates Armed Forces in Central and South America.  
Here are a few examples

Capt John Smith  
7024 AIRPS  
PSC 3 Box 2051  
APO AE 09021

SSGT Tomas Jones  
X-1 Div/Admin  
USS Kitty Hawk (CVA-61)  
FPO AP 96634-2770

Maj Susan Brown  
Company A 122 Sig Bn  
Unit 20511 Box 4920  
APO AA 30409-2342

### 5.7.2. Domestic Locations

Domestic military addresses have the same components as civilian addresses. Here is an example:

Capt John Smith

Travis AFB  
3434 Doolittle Dr  
Fairfield CA 79854

## 5.8. INTERNATIONAL ADDRESSES

### 5.8.1. Canadian Addresses

Canadian street addresses and city names follow the same guidelines as those for US addresses. The standards for state, postal code, and country elements were explained in Sections 5.4.1, 5.5, and 5.6.2 above.

As noted above, the Canadian postal code will not cause Banner to identify the country as Canada automatically (nation code is 'CA'). You need to select the nation code for Canada explicitly.

### 5.8.2. Other International Addresses

The following guidelines apply to addresses in all foreign countries other than Canada.

#### 5.8.2.1. Street Addresses.

International addresses follow most of the same guidelines as those for US addresses. Enter all information in mixed case. Never use all uppercase or all lowercase letters (except for acronyms). Use the abbreviations and formats described in Section 5.1 above. Hyphens and slashes can be used when needed, but periods should be avoided. A slash can be added between address elements when combining two short lines of address together in a single input line. This often happens with addresses for Hong Kong, Japan, China, and other Asian countries. When you combine address lines in this way, add the information from the 'lower line' at the end of the information on the 'upper line'.

If possible, keep the street address information on Street Line 1 and Street Line 2

#### 5.8.2.2. City, State, Province, and Postal Code Information.

Enter the city, province, and postal code information as follows:

Enter the city name in the City field.

Enter the state or province name in the City field, after the city name.

If the postal code will fit into the City field, enter it there, before the city.

If the postal code will not fit into the City field, enter it into the ZIP Code field.

Leave the County field blank.

Always use mixed case.

Never use special characters—octothorp (#), percent sign (%), or ampersand (&). Some countries require special formatting within the addresses. These rules should be followed as much as is possible. For example, in German and French addresses the postal code is part of the city information. Enter it in the City field directly before the city name. This will ensure that the address will print correctly for mailing. Question – would it make sense to include a link to a supplement for country-specific foreign addresses?

### 5.8.2.3. Nation Information.

The name of the foreign country must be printed alone on the last line of the address for outgoing mail. The code used to designate the country is in the Banner validation table STVNATN. The people who maintain STVNATN must ensure that the translations associated with these codes are the correctly spelled country names, as required by USPS.

[Name]  
[Street Line 1]  
[Street Line 2]  
[City Field]  
[Nation]

Ping Wang  
7-301 Houji  
JiangNan Rd  
51240 Guang Zhou  
CHINA PRC

[Name]  
[Street Line 1]  
[City Field]  
[Nation]

Aziz Al-Shibaz  
c/o ARAMCO  
31311 Dhahram  
SAUDI ARABIA

## 6. Telephone Number Standards

### 6.1. TELEPHONE TYPES

Every telephone number in Banner must have a telephone number type ('telephone type' for short). The telephone type is identified internally by a telephone type code. There are thirteen telephone types currently in use at WPI. They are enumerated in the following table.

## Telephone Type Code Description

Telephone Code	Description
AG	Agency Phone
B2	Business (atype:B2) phone
B3	Business (atype:B3) phone
BI	Billing
BU	Business
C1	Cellular Phone 1
EM	Emergency
F1	Resident Fax 1
F2	Resident Fax 2
FA	Business Fax 1
FB	Business Fax 2
GR	Grade Mailing
GS	Graduate School Address
GU	Guardian
HS	Academy Students - HS Contact
LO	Local Mailing
MA	General Mailing
P2	Parent (secondary)
PA	Parent (primary)
PF	Parent (Father)
PM	Parent (Mother)
PR	Permanent Residence
PS	Parent (summer)
S1	Seasonal #1
S2	Seasonal #2
SC	School/Campus
SS	Student (summer)
SU	Summer Mailing
TB	Temporary Business #1
TR	Temporary Residence #1
UM	Universal Messaging
VN	Vendor

In database terms, the telephone type is part of the primary key of every telephone record. For example, if Sally Jones has a telephone number 555-123-4567 and she wants Banner to think of this as both a home telephone and a business telephone, you need to create two records for this <person, telephone> combination in Banner, like this:

Record 1 for Sally Jones 555-123-4567 PR

Record 2 for Sally Jones 555-123-4567 BU

This fact is not complicated, but it is very important and you need to keep it clearly in mind.

It is acceptable to have multiple telephone types for the same telephone number, as in the example above. But you should avoid having multiple telephone numbers of the same type for the same entity. If possible, create at most one MA-type telephone number per entity; at most, one HO-type address per entity, etc. Emergency telephone numbers are exempt from this rule. It is acceptable to have multiple EM-type telephone numbers for the same person; but make every effort to ensure that a person's EM-type telephone numbers are current and correct.

Telephone numbers (and telephone types) can live in the Banner database in two different ways. They can be either address-type related, or not address-type related.

### 6.1.1. Address-Type Related

Banner supports the concept of associating telephone numbers with addresses. You make this association in SPATELE by entering valid values in the Address Type and Sequence fields along with the telephone number.

### 6.1.2. Not Address-Type Related

To create a telephone number that is not address-type related, simply leave the Address Type and Sequence fields blank in the SPATELE record.

## 6.2. US AND CANADIAN TELEPHONE NUMBERS

U.S. and Canadian telephone number information is comprised of three fields in Banner: (1) a three-digit area code, (2) a seven-digit telephone number, and (3) an extension.

The three-digit area code is required.

The seven-digit phone number is required. Enter this with no hyphen between the 3rd and 4th digits.

The extension is optional. If you enter an extension, enter the digits only. Do not include the abbreviation 'EXT' or an 'X' in the Extension field.

Telephone numbers in Puerto Rico, the US Virgin Islands, and most other Caribbean locations follow the same format as US and Canadian telephone numbers.

## 6.3. INTERNATIONAL TELEPHONE NUMBERS

Telephone number information for other international locations is also comprised of three fields in Banner: (1) a International Access code, (2) a city code, and (3) a telephone number.

The nation code varies in length from one to three digits, depending on the nation. Enter this under 'International Code Country City' in SPATELE. (This field is not available for telephone numbers in SPAIDEN or PPAIDEN.)

The city code varies in length from one to three digits, depending on the nation. Not all nations use city codes with telephone numbers. If required, enter this also under 'International | Code Country City' after the nation

code, separated by a space. Note: City codes are often shown in lists and catalogs with leading zeroes. Do not enter the leading zeroes for city codes in Banner.

Enter the telephone number in the same field used for US and Canadian telephone numbers.

## 7.0 Data Maintenance Protocols

Personal Identification Information captured and maintained at Worcester Polytechnic Institute (WPI) should be considered protected data and thorough research needs to be done, before this data is altered by any individual employed by the institution. If handled inappropriately, changes to personal information can have serious negative impact for the individuals as well as for the institution. It is important to maintain the integrity of the data stored in WPI systems as well as for information that is passed back and forth through third-party systems such as SEVIS and FsaATLAS.

The purpose of this Personal Identification Information Policy is to ensure the security, confidentiality and appropriate use of all personal identification information which is processed, stored, maintained, or transmitted on WPI computer systems and networks. This includes protection from unauthorized modification, destruction, or disclosure, whether intentional or accidental. By law and WPI policy, certain data is confidential and may not be released without proper authorization. This policy is intended to serve as a general procedure on the topic and may be supplemented by other specific policies and regulations such as the Massachusetts Privacy Law, the Health Insurance Portability and Accountability Act (HIPAA), the Family Educational Rights and Privacy Act (FERPA), the Gramm Leach Bliley Act, and other federal or state regulations pertaining to the protection of information.

The Personal Identification Information Policy applies to members of the WPI community who have access to update personal identification information in Banner or external systems.

### 7.1 Maintenance Access to Personal Information

Below are the requirements and limitations for all WPI divisions/departments to follow in making changes to personal information owned by WPI.

- All individuals with maintenance access to personal identification information must adhere to the following requirements prior to making any changes to data.
- All individuals with maintenance access to personal identification information must be trained to properly research any change request received.
- All individuals must thoroughly research the individual for whom the change is being made to determine if the individual is:
  - A current staff or faculty member
  - A currently enrolled student (undergraduate, graduate or CPE)
  - A current admissions applicant or recruit
  - Domestic or International

- If it is found that any of the above apply to the individual, the change request must be forwarded to the responsible department listed below (if not the researching department) following the designated hierarchy:
  1. All International students, alumni ,staff and faculty – International House
  2. Currently employed **non-student and** non-international staff and faculty – Human Resources
    - All non-international student employees should be referred to the Registrar’s Office for updates.
  3. Currently non-international students enrolled in **undergraduate, graduate and CPE** credit-based coursework during all terms/semesters – Registrar’s Office
  4. Current Undergraduate Admissions applicants and Recruits – Undergraduate Admissions
  5. Current Graduate Admissions applicants and recruits – Graduate Admissions
  6. Currently non-international students enrolled in non-credit/CEU based coursework – Corporate and Professional Education and Summer Office.
  7. If it is found that the individual is not currently employed by or enrolled at WPI and is not found to be international, the designated change should be forwarded to the Development Services.

**Individuals making changes to personal information should document the changes made, the source of the information change request and to confirm data with the affected individual prior to making changes of surname, marital status or gender if the affected individual is not the source of the information to be changed. If the above changes with the addition of the confidentiality flag and the legal address are made to the record of current admissions applicants (undergraduate and graduate), students, employees and non-credit seminar attendees a confirmation of the changes made should be sent to the affected individual. This could be done through regular mail or email.**

### 7.1.1 Contacts for Personal Information Updates

<b>International:</b>	<b>Director of International Students and Scholars</b>
<b>Human Resources:</b>	<b>HR Generalist/HRIS Analyst</b>
<b>UG Admissions:</b>	<b>Coordinator of Admissions Communications</b>
<b>Student (Registrar’s Office):</b>	<b>Record Keeping Assistant</b>
<b>Graduate Admissions:</b>	<b>Assistant Director, Operations</b>
<b>Academic and Corporate Development</b>	<b>Manager</b>
<b>Recreation Center</b>	<b>Associate Athletic Director</b>
<b>Advancement and Alumni Relations:</b>	<b>Manager of Development Services Operations</b>

## 7.2. NAME CHANGES

This subsection describes the policies and procedures for making name changes in Banner. When a name is changed or corrected in Banner, the system automatically saves the previous name in the historical record. The mechanics of making the change or correction are simple: Pull up the person's record in SPAIDEN or PPAIDEN, key over the old name with the new name, and save the record.

For a name change, the person needs to go to the designated office and make the request face-to-face or (b) make the request in writing. In either case, if the legal name needs to be changed, the person must produce proof, in the form of a Social Security card, marriage certificate, or court documentation that shows the request is consistent with his or her legal name. If the request is made in writing by mail, the person must include a photo copy of his or her Social Security card or other documentation with the written request.

Please refer to the previous page for descriptions of which office(s) are authorized to make name changes for different types of entities.

### Human Resources

For Employees Full-time and part-time, faculty and staff, including retirees, non-Student Workers Work Studies Human Resources

- Make a photocopy of the person's documentation with the new name on it.
  - Social Security Card
  - Court Documentation
  - Marriage Certification
  - Official Passport Documents
- For international Students please contact Director of International Students and Scholars for official documentation. Pull up the person's record in PPAIDEN. Enter the person's Banner ID manually if it is known. Otherwise, perform a search on the person's name.
- Write down the current (old) name on the sheet with the photocopy of the Social Security card.
- Hit <Ctrl/Page Down> to move the cursor into the data block.
- Tab into the Last Name field and key over the old last name (if this has changed).
- Tab into the First Name field and key over the old first name (if this has changed).
- Tab into the MI field and key over the old middle name (if this has changed).
- Verify your input.
- Click the Save icon to save your change(s).
- Forward the photocopy sheet to Payroll

### Students

Includes Student Applicants, Student Recruits, Excluding students who are also employees or retirees. Financial Aid Applicants, Admissions and Records

- Make a photocopy of the person's documentation with the new name on it.
  - Social Security Card
  - Court Documentation
  - Marriage Certification

- Official Passport Documents
  - For international Students please contact Director of International Students and Scholars for official documentation.
- Pull up the person's record in SPAIDEN. Enter the person's Banner ID manually if it is known. Otherwise, perform a search on the person's name.
  - Write down the current (old) name on the sheet with the photocopy of the Social Security card.
  - Hit <Ctrl/Page Down> to move the cursor into the data block.
  - Tab into the Last Name field and key over the old last name (if this has changed).
  - Tab into the First Name field and key over the old first name (if this has changed).
  - Tab into the MI field and key over the old middle name (if this has changed).
  - Verify your input.
  - Click the Save icon to save your change(s).
  - Keep the photocopy sheet on file.

### **Community Members**

Includes Non-students who have ID cards and use College resources—the CLC, the library, etc. Admissions and Records

Same as above

### **Alumni and Development**

- Make a photocopy of the source document requesting the name change
- Pull up the person's record in APAIDEN. Enter the person's Banner ID manually if it is known. Otherwise, perform a search on the person's name.
- Hit <Ctrl/Page Down> to move the cursor into the data block.
- Tab into the Last Name field and key over the old last name (if this has changed).
- Tab into the First Name field and key over the old first name (if this has changed).
- Tab into the MI field and key over the old middle name (if this has changed).
- Verify your input.
- Click the Save icon to save your change(s).

### **International Students and Scholars**

Includes all international students, faculty, staff and alumni

For name changes, students must submit documentation such as a marriage certificate or new passport to the International House. Copies are kept with the student's file as part of the permanent record.

- Pull up the person's record in SPAIDEN. Enter the person's Banner ID manually if it is known. Otherwise, perform a search on the person's name.
- Write down the current (old) name on the sheet with the photocopy of the documentation.
- Hit <Ctrl/Page Down> to move the cursor into the data block.
- Tab into the Last Name field and key over the old last name (if this has changed).
- Tab into the First Name field and key over the old first name (if this has changed).

- Tab into the MI field and key over the old middle name (if this has changed).
- Verify your input.
- Click the Save icon to save your change(s).
- Keep the photocopy sheet on file.

## Vendors Purchasing Department

Vendor names can be changed on the FTMVEND form at the request of a vendor if the tax id does not change. The vendor would need to complete, sign and submit a W-9 form. If the vendor was bought out or if their tax id changes, a new vendor is created in Banner .

### 7.3. ADDRESS CHANGES

The modification of an address can be either an address change (in the strict sense) or an address correction. In the strict sense, the term 'address change' refers to the recording of a new address for a person as a result of relocation, the official renaming of a street, etc. The term 'address correction', on the other hand, refers to the correction of data entry errors in an otherwise correct address record. To make either a correction or a change, first pull up the person's address record(s) in the General Person Form (SPAIDEN or PPAIDEN). To make an address correction, just do the following:

- Tab into the appropriate field(s).
- Key over the old data with the new value(s).
- Click the Save button to save.

With a correction, the old values will be 'written over' by the new values in the database. They will not remain as part of the historical record. If you want the old values to remain for the historical record, you need to make an address change.

To make an address change, you must do two things: (1) Inactivate the old address record, (2) create a new record for the new address. To inactivate the old address, follow these steps:

- Pull up the person's address record(s) in the General Person Form (SPAIDEN or PPAIDEN or APAIDEN)
- Enter the effective date for the inactivation in the TO field. Make sure that the dates are not overlapping. The TO date must be before the FROM date of the new address.
- Check the 'Inactivate Address' checkbox.
- Click the Save button to save the record. The record will remain in the database as an inactive record.

To enter the new address, follow these steps:

- Click the Insert button or press F6 to create a new record.
- Enter the address type, street, city, state, etc.
- The purpose of the Source field is to record the source of the information upon which the change is based. If you know the source, enter it, even though WPI has not been consistent in its use of this field. To obtain a list of valid values for this field double-click in the Source field.
- Click the Save button or press F10 to save the new record.

## Address Changes

Note that the address maintenance form also provides fields for you to enter telephone number information. Be aware that if you enter a telephone number in these fields, it will be an address-type related telephone number. See Section 6.1.1 for a description of address-type related telephone numbers.

As noted in Section 5.1, there are thirty-five address types in use at WPI. To maintain data integrity and to minimize unpleasant surprises, it is important to have protocols in place to control the maintenance of these types. Please note that all address changes must first follow the Personal Identification Information Policy as referenced in section 7.1. The following table describes these protocols.

### Address Code Description Maintenance Authorization (descriptions of the address type are noted in section 5.1)

Addr_Type _Code	STVATYP_DESC	Primary Data Steward
AG	Agency Address	Finance
AP	Accounts Payable	Finance
B2	Business address #2	Alumni and Development -
B3	Business address #3	Alumni and Development
BI	Billing	Finance
BU	Business	Please use the appropriate contact for entity type as listed in <a href="#">Section 7.1</a> .
EM	Emergency - Records exist in SPREMRG	For manual updates, follow the directions in the section 7.1. Staff, Faculty and Student can also self-update in Banner Self-Service.
GF	Gift Receipt (Advancement)	A&D - alternate corporate address for gift receipt purposes
GU	Guardian	Student
HB	Historical Business Address	A&D - not used any longer, legacy info only
HR	Historical Residence Address	A&D - not used any longer, legacy info only

IN	International House use ONLY	International House - SEVIS
LO	Local Mailing	Please use the appropriate contact for entity type as listed in <a href="#">Section 7.1</a> .
MG	Matching Gift Form - Corporate	A&D - Corporate, ,Foundation, Other Organizations Constituents
MA	General Mailing	Please use the appropriate contact for entity type as listed in <a href="#">Section 7.1</a> .
P2	Parent (secondary)	Please use the appropriate contact for entity type as listed in <a href="#">Section 7.1</a> .
PA	Parent (primary)	Please use the appropriate contact for entity type as listed in <a href="#">Section 7.1</a> .
PO	Purchase Order	Finance
PR	Permanent Residence	Please use the appropriate contact for entity type as listed in <a href="#">Section 7.1</a> .
S1	Seasonal Address #1	A&D - Seasonal Address for person constituent
S2	Seasonal Address #2	A&D - Seasonal Address for person constituent
SC	School/Campus	HR - Faculty and Staff Directory for on campus locations
TB	Temporary business #1	A&D - Temporary Business - seldom used - LZ to verify perhaps inactivate
TR	Temporary residence #1	A&D - Temporary Business - seldom used - LZ to verify perhaps inactivate
WW	World Wide Web	A&D - no longer used but addresses in database
XX	Confidential	A&D - no longer used but addresses in database

## 7.4. TELEPHONE NUMBER CHANGES

Telephone number changes should be made through SPATELE, not the General Person form (SPAIDEN or PPAIDEN). As with addresses, telephone number changes can be either changes (in the strict sense) or corrections. To make a correction, just tab into the field(s) that you want to modify, replace the old value(s) with the new one(s), and save. To make a change,

- Inactivate the current record by checking the 'Inactivate' checkbox.
- Click the Save button or press F10 to save.
- Click the Insert button or press F6 to create a new record.
- Enter the telephone number type and the other information for the new number: area code, telephone number, etc.
- Click the Save button or press F10 to save the new record.

It is important to understand the input fields on the SPATELE input form. It is especially important to understand the difference (and the relationship) between the two Type fields—the fields numbered 1 and 5 in the illustration below.

The numbers are included in the illustration for ease of reference. (They are not part of the input form.) The meanings of the fields corresponding to these numbers are as follows:

1. The telephone number type
2. The area code
3. The 7-digit telephone number
4. The extension, if there is one
5. The address type T to which this telephone number should be associated (optional)
6. The sequence number of the address of type T to which this telephone number should be associated (optional)
7. Primary indicator. If checked, this will be the primary telephone number of this type for this person
8. Unlisted indicator. If checked, this telephone number will be 'unlisted'
9. Inactive indicator. If checked, this telephone number is inactive
10. International access number, if there is one to be verified

If you enter values for fields 5 and 6, the telephone number will be address-type related. If you leave these fields blank, it will not be. See Section 6.1.1 for a description of address-type related telephone numbers.

The protocols for updating telephone numbers are organized by telephone number type. They are summarized in the following table:

### 7.4.1 Telephone Number Changes

Telephone Code Description Maintenance Authorization

- BI Billing Business Office, Finance, Accounts Receivable, Purchasing
- BU Business Human Resources (for employees), Admissions and Records (for students), Purchasing (for vendors).

- CA Car This type is not business-critical. Anyone who has maintenance access to telephone numbers can update this type.
- CP Cell This type is not business-critical. Anyone who has maintenance access to telephone numbers can update this type.
- EM Emergency This type is created and maintained by Admissions and records (for students)
- FAX FAX This type is not business-critical. Anyone who has maintenance access to telephone numbers can update this type.
- HO Home/Local This type is created and maintained by Admissions and records (for students).
- MA Mailing Human Resources (for employees), Admissions and Records (for students)
- PA Parents Admissions and Records
- PR Permanent Human Resources (for employees), Admissions and Records (for students)
- RL Residence Life Residence Life Staff, Admissions and Records
- SC School Campus College Services, Information Resources and Services
- TE Temporary This type is not business-critical. Anyone who has maintenance access to telephone numbers can update this type.

## 7.5. WPI EMAIL ADDRESSES

Email addresses are created and stored in Banner, but the actual email accounts live on the Windows Exchange server. The addresses are generated by an automated process that pulls the first and last names from the Banner person table and constructs the address. The email accounts are created by another process that pulls the addresses from Banner and sets up the accounts in Exchange.

Email addresses are seldom updated manually. If you need to update an email address, pull up the person's email address records in GOAEMAL, tab in to the Email Address field, make the necessary modifications, and save.

When you change an email address in GOAEMAL, you must ensure that the corresponding change is made to the email account in Exchange.

The Email Administrator is the only person authorized to update email addresses manually.

## 7.6. DECEASED PERSONS

Family deaths are a sensitive issue and the College should make every effort not to send mail directly to deceased persons. The deceased status of an individual can be verified by a death certificate, obituary, or the Social Security Death Index (SSDI). You can conduct an SSDI search at <http://ssdi.rootsweb.com/>.

To update the status for a deceased individual, pull up the person's record in SPAPERS, check the Deceased checkbox, and enter the Date of Death.

The authority and responsibility for performing these updates is summarized in the table in Section 7.1.1.

### **Category of Person Update Authority**

Employees and retirees of the College Human Resources, College Advancement constituents who are neither current students, current employees, nor retirees, College Advancement Students, student applicants, and student recruits and Admissions and Records

## **7.7. SOCIAL SECURITY NUMBER CHANGES**

The person requesting a social security number change must either present his or her current Social Security card in person or include a photocopy of the new card with a written request. The protocols for Social Security number changes are the same as those for name changes. See Section 7.1 above.

Financial Aid and Human Resources/Payroll must be informed of all Social Security number changes.

## **7.8. EMERGENCY CONTACT INFORMATION**

Emergency contact information should be maintained by Admissions and records for students. Emergency contact information can consist of address (type code PR) and telephone number type code EM).

## **Appendix A: Name and ID Search Methods**

Before you create a new record for an entity, conduct an ID and name search to ensure that the entity in question does not already exist in the Banner database. If the entity does exist, do not create a new record because this will create a duplicate record for the same entity. The search can either be done by name or by Banner ID.

### **A.1. SEARCH BY NAME**

You can perform a by-name search from any Banner form that contains an ID field. Follow these steps:

Make sure the ID field and the Name field is blank. If they are not, select the Clear option from the Record menu on the toolbar, or simply press Shift/F4 to clear the fields. You have the option of searching by full name or partial name.

#### **Full name option:**

- Tab into the Name field to the right of the ID field and key in the person's name— LastName[comma+space]FirstName—and press ENTER.
- If no matches are found, no values will be returned to the form.
- If exactly one match is found, an ID and a name will be returned to the form.
- If more than one match is found, the Extended Search Window will appear. The Extended Search Window is discussed in Section A.3 below.

## Partial name option

Tab into the Name field to the right of the ID field, key in part of the name combined with one or more Oracle wildcard characters (%), and press ENTER. Here are a few examples.

-

For Charlene Schnickelgruber, you can key in 'Schnick%' and press ENTER.

- If no person is found whose last name begins with 'Schnick', no values will be returned to the form.
- If exactly one such person is found, an ID and a name will be returned to the form.
- If more than one such person is found, the Extended Search Window will appear. See Section A.3 below.

For Stephanie Acuna, you can key in 'Acuna, Ste%' and press ENTER.

- If no person is found whose last name is 'Acuna' and whose first name begins with 'Ste', no values will be returned to the form.
- If exactly one such person is found, an ID and a name will be returned to the form.
- If more than one such person is found, the Extended Search Window will appear. See Section A.3 below.

For Ian MacTavish (if you are not sure whether the last name should begin with 'Mac' or 'Mc') key in 'M%vish, Ian' and press ENTER.

- If no such person is found, no values will be returned to the form.
- If exactly one such person is found, an ID and a name will be returned to the form.
- If more than one such person is found, the Extended Search Window will appear. See Section A.3 below.

If you are not sure if a name has a space or a special character, use the % between the letters as in the example above.

## A.2. SEARCH BY ID

Searching by ID is basically the same as searching by name, except you key a value into the ID field rather than the Name field. Follow these steps:

Make sure the ID field and the Name are blank. If they are not, select the Clear option from the Record menu on the toolbar, or simply press Shift/F4 to clear the fields. You have the option of searching by ID or partial ID.

### Full ID option:

- Make sure your cursor is in the ID field, key in the person's ID, and press ENTER.
- If no matches are found, no values will be returned to the form.
- If exactly one match is found, an ID and a name will be returned to the form.
- If more than one match is found, the Extended Search Window will appear. The Extended Search Window is discussed in Section A.3 below.

## Partial ID option

- Make sure your cursor is in the ID field; key in part of the ID combined with one or more Oracle wildcard characters (%), and press ENTER.
- If no matches are found for your pattern, no values will be returned to the form.
- If exactly one match is found for your pattern, an ID and a name will be returned to the form.
- If more than one match is found for your pattern, the Extended Search Window will appear. The Extended Search Window is discussed in Section A.3 below.

## A.3. THE EXTENDED SEARCH WINDOW

When any of the searches just described results in more than one match, the Extended Search Window appears. (See the illustration on next page.) You can use this window to refine and narrow your search.

The number to the right of the dropdown list indicates the number of matches found. You can either pick an element from the list or refine your search by

- (a) Selecting one of the radio buttons: Person or Non-Person, or
- (b) Entering additional information in one of the data fields: City, State/Prov, ZIP/PC, Name Type, SSN, Date of Birth, Gender.

After you enter values into these fields, you can refine your search by clicking the magnifying glass button in the upper right in the illustration—the one circled in red in the picture above. To exit the form, click the cancel icon—the red circle with the diagonal line through it—or press Ctrl/F7.

The supplemental data fields in this window can prove very useful, especially when you are trying to determine whether or not a person already exists in the Banner database. Suppose you are dealing with a John Smith. A search for 'Smith, John' will probably return dozens of matches because this is a very common name; and it can be virtually impossible to determine whether or not one of these matching names belongs to the John Smith you are concerned about. However, if use the Extended Search Window to narrow your search to the John Smith with Social Security number 557269874 and a birth date of 07/12/66, you can tell with a high degree of certainty whether or not this person already exists in the database.

Here are a few additional suggestions:

Many people named John also go by the name 'Jack'. If you do not find a John Somebody, look also for a Jack Somebody. This suggestion also applies to Robert/Bob, James/Jim, Margaret/Peggy, and so on. If you find it odd to think of 'Jack' as a nickname, think of it as an alternate appellation. See Appendix B for list common names along with their nicknames and alternate appellations. The material in Appendix B can help minimize the risk of duplicate entry. Use it. As noted in Section 3 above: A complete search might take a few minutes to perform up front, but fixing a multiple PIDM situation can take several days or weeks.

Before you even get to the Extended Search Window, make every effort to obtain a true superset with your initial search. In other words, make your initial search course-grained to increase the likelihood that the results will include the person for whom you are looking—if he or she is there. For example, if you are looking for a

Maxine Roberts, search for 'Roberts, Max%' in your initial search because Ms Roberts might already be in the database as Max Roberts or Maxi Roberts, but not as Maxine Roberts.

If the person for whom you are searching is physically present at your workstation, ask her if she has a maiden name, former married name, etc., that she no longer uses. If the answer is yes, search for these as well.

#### **A.4. SEARCHING FOR A PERSON WITH SOAIDEN**

You can also use the SOAIDEN form for person searches. You can invoke this form directly by entering the name 'SOAIDEN' on the General Menu Form. More often, however, you will invoke this form from one of many forms that contain an ID field—SPAIDEN, PPAIDEN, SPATELE, etc. From these forms, you invoke SOAIDEN by clicking the magnifying glass button to the right of the Name field.

When SOAIDEN appears, proceed as follows:

- Enter your query—either a name or an ID—and execute the query by pressing F8. Partial names and partial IDs with wildcard characters are also allowed.
- All matches will be displayed on the form: ID, Last Name, First Name, Middle Name.
- To view more detailed information for any match, Highlight the ID From the toolbar select Query | Count Hits or press Shift/F2

This invokes the form SOAIDNS, which shows more detailed information associated with the person whose ID you highlighted SOAIDEN is typically used to conduct a by-name search for a person's ID.

#### **A.5. SEARCHING FOR A NON-PERSON WITH SOACOMP**

The form SOACOMP is the analog of SOAIDEN for non-person entities such as vendors. The query is entered in the same way as in SOAIDEN.

#### **A.6 SEARCHING FOR A PERSON/NON-PERSON USING GOAMATCH**

- 1) From SPAIDEN, click the icon from the toolbar. The GOAMTCH form will automatically
- 2) appear.
- 3) If you are creating a person record, proceed to Step 8. If you are creating a nonperson record, click on dropdown arrow next to the "Matching Source" field.
- 4) Select "NON-PERSON\_MATCH" from the dropdown list.
- 5) Click "OK."
- 6) Click the "Generate ID" button.
- 7) Click the "Next Block" button.
- 8) Under the "Data Entry" section, if you are creating a person record, enter the last name under the "Last Name" field and/or Social Security Number under the "SSN/SIN/TIN" field and then proceed to Step 11. If you are creating a nonperson record, enter the non-person name under the "Non-Person Name" field and then proceed to Step 9.
- 9) Under the "Data Entry" section, enter information into the "Street Line 1" (AP type) and/or "Telephone" (AP type) fields, if applicable.

- 10) Click the “Duplicate Check” button.
- 11) If the result of the Duplicate Check is...
  - a. New, click “Yes” when “No matches found, create as new?” window appears. Continue with data entry on desired form. *Warning! Be sure to verify “New” status by performing a manual search in Banner. (End of Matching)*
  - b. Match, click “Select ID” button. *Optional, click “Update ID” button to update selected record with information entered into GOAMTCH form.*
- 12) Continue with data entry on desired form, such as SPAIDEN. **(End of Matching)**
- 13) c. Potential Match, (1) highlight correct record in “Potential Match” tab and
- 14) then click “Select ID” button. *Optional, click “Update ID” button to*
- 15) *update selected record with information entered into GOAMTCH form.*
- 16) (2) Click “Create New” button. Continue with data entry on desired form, such as SPAIDEN. **(End of Matching)**

The screenshot shows the Oracle Developer Forms Runtime interface for a matching entry form. The form is titled "Common Matching Entry GOAMTCH 7.5 (TRNG)". It includes a "Data Entry" section with fields for Last Name (Smith), First Name (Pat), Middle Name, Address Type (PR - Permanent Residence), Street Line 1-3, City, State or Province, ZIP or Postal Code, County, and Nation. There are also fields for Non-Person Name, SSN/SIN/TIN, Birth Date (Day, Month, Year), Gender, Telephone, E-mail Type, and E-mail.

Below the data entry fields is a "Potential Matches (2)" table with columns for ID, Name, Matched or Hierarchical Address, Telephone, and E-mail. The table contains two rows of potential matches for "Smith, Paula" and "Smith, Patrick".

At the bottom of the form are buttons for "Duplicate Check", "Select ID", "Update ID", "Details", "View Comments", and "Create New".

Red callout boxes provide instructions for using these buttons:

- Duplicate Check:** Use the Duplicate Check button to search for potential matches. (Using next block after entering data will also perform this function.)
- Select ID:** Use Select ID button to go to the ID highlighted without making any changes in the GOAMATCH form. Will not return to potential match list.
- Update ID:** Use Update ID button to add any updates entered in this form to the ID record. This assumes you have identified a match.
- Details:** Use Details button to view potential match and when done return to match list.
- Create New:** Use Create New button to create a new ID after checking all potential matches and none are the same Person.

At the bottom of the form, there is a "Matching Rule Sets" section with a dropdown menu showing "1=Primary Name Match, SSN/SIN/TIN Missing, Birth Day NULL Match, Birth Month NULL Match, Birth Year NULL Match". Below this is a status bar with the text "Current identification number. An \*\* indicates a changed ID." and "Record: 2/2".

## Appendix B: Common Nicknames and Alternate Appellations

Name Nickname Or Alternate Appellation

Aaron Ron  
Abel Abe  
Abigail Ab, Abby, Gail, Nabby  
Abner Ab, Abbie  
Abraham Abe, Abram, Bram  
Adaline Ada, Adela, Aline, Edith  
Adam Ade, Edie  
Adelaide Ada, Addie, Adela, Adeline, Della, Heide  
Adela Della  
Adelbert Albert, Del, Delbert, Bert  
Adeline Linney  
Adolphus Ado, Adolph, Dolph  
Adrian Rian, Ryan  
Adrienne Adrian (M)  
Agatha Addy, Ag, Aggie, Agnes  
Agnes Aggy, Ann, Nancy, Nessie  
Aileen Helen  
Alanson Al, Lanson  
Alastair Al  
Albert Al, Bert, Bird  
Alberta Abertina, Albertine, Allie, Bert, Bertie  
Aleva Leve, Levy  
Alexander Ala, Alec, Alex, Andi, Sander, Sandy  
Alexandria Alexis, Alla, Drina, Sandra, Ellie, Elic, Sandra, Xandra  
Alexis Alexandra, Lexi  
Alfred Al, Alf, Alfie, Fred  
Algernon Algy  
Alicia Ally  
Alice Alcy, Alicia, Elsie, Lisa  
Aline Adeline  
Alison Ali  
Almena Allie, Mena  
Almina Minnie  
Alonzo Al, Alphonzo, Lon, Lonnie, Lonzo  
Alphinius Alphas  
Almira Myra  
Alyssa Al, Ally, Lissa, Lissia  
Amanda Amy, Manda, Mandana, Mandy  
Ambrose Am, Brose  
Amelia Amy, Emily, Mel, Melia, Millie  
Amos Moses  
Anastasia Ana, Stacy

Andrea Drea, Rea  
Andrew Andy, Ansey, Drew  
Angela Angel, Angelica, Angelina, Angeline, Angie, Jane  
Angelina Same as for Angela, plus Lina  
Ann Annie, Hannah, Nan, Nanny, Nancy, Nana, Susanna  
Anna Same as for Ann  
Anne Same as for Ann  
Annie Same as for Ann  
Annette Anna (plus Anna's nicknames), Nettie  
Anthony Tony  
Antoinette Antonia, Net, Nettie, Toni, Tonie  
Antonia Nettie  
Aquilla Quil, Quillie  
Arabella Ara, Bella, Belle  
Archibald Archie, Baldie, Baldy  
Ariadne Arie  
Arielle Arie  
Aristotle Telly  
Arizona Ona, Onie  
Arlene Lena  
Armanda Mandy  
Armilda Millie, Milly  
Arminda Mindie  
Arminta Mintie, Minnie  
Arnold Arnie  
Artemus Art  
Aubrey Bree, Brea  
Audrey Dee  
Augusta Aggy, Augie, Gusie, Gussie, Ina, Tina  
Ausustina Same as for Augusta  
Augustine Gus, Gustus  
Augustus Same as for Augustine  
Aurilla Rilly  
Barbara Babs, Barb, Barbie, Barby, Bobbie, Bonnie  
Barbery Barbara (plus Barbara's nicknames)  
Barnabas Barney  
Barnard Barney  
Bartholomew Bart, Bartel, Barth, Bat  
Barticus Bart  
Beatrice Bea, Trisha, Trissy, Trixie  
Bedelia Bell, Belle, Linda  
Benedict Bennett  
Benjamin Ben, Benjie, Bennie, Jamie  
Bernard Bernie  
Bertram Bert  
Bertha Bert, Bertie  
Beverly Bev

Blanche Bea  
Brenda Brandy  
Bridget Biddy, Bridie, Brie, Delia  
Brian Bryan, Bryant  
Brittany Britt  
Caldonia Callie, Dona, Donna  
Caleb Cal  
California Callie  
Calista Kissy  
Calvin Cal  
Cameron Cam  
Camille Cammy, Millie  
Campbell Cam  
Candace Candy, Dacey  
Carl Charles, Karl  
Carlotta Lottie  
Carmen Carm, Cammie, Charm  
Carmon Same as for Carmen  
Carmellia Mellia  
Caroline Caddie, Carol, Carrie, Cassie, Lena, Lynn  
Carolyn Same as for Caroline  
Carthaette Etta, Ety  
Casper Jasper  
Cassandra Cass, Cassie, Cassy, Sandi, Sandra, Sandy  
Catherine Cathy, Karen, Katharine, Katie, Kathleen, Kay, Kit,  
Kittie, Rhynie, Rina, Rinae, Trina  
Cathleen Same as for Catherine  
Cecilia Celia, Cissy  
Celeste Celia, Lessie  
Celinda Linda, Lindy, Lynn  
Charity Chat  
Charles Buck, Carl, Chad, Charlie, Chick, Chuck  
Charlotte Car, Carlotta, Letty, Lotta, Lottie  
Chauncey Chance  
Chelsey Chet  
Chester Chet  
Chloe Clo  
Christian Chris, Christopher, Kit  
Christine Chris, Crissy, Christy, Ina, Tina, Xina  
Christina Same as for Christine  
Christopher Chris, Christian, Kester, Kit  
Cicely Cilla  
Cinderella Arilla, Cindy, Rilla, Rella  
Clara Claire, Clarice, Clarissa  
Clarence Clay  
Clarinda Clara  
Clarissa Clara (plus Clara's nicknames), Clare, Cissy

Cleatus Cleat  
Clementine Clem  
Clifford Cliff, Ford  
Clifton Cliff  
Cole Colie  
Columbus Lum  
Constance Connie  
Cordelia Cordy, Delia  
Corey CoCo, Cordy, Ree  
Corinne Cora, Ora  
Cornelia Connie, Conny, Cornie, Corny, Neely, Nelle, Nelly  
Cornelius Neil, Nelly  
Cory Same as for Corey  
Courtney Corky, Court, Curt  
Crystal Chris (plus Christine's nicknames)  
Cynthia Cindy, Sina  
Cyrus Cy  
Daisy Margaret  
Daniel Dan, Danny, Dank  
Danielle Dani, Ellie  
Daphne Daph, Daphie  
David Dave, Davy  
Deanne Ann, Dee  
Deborah Deb, Debbi, Debbie, Debby, Debi, Deby  
Delbert Bert, Del  
Deidre Deedee  
Delia Cordelia, Fideila  
Delilah Dell, Della, Lil, Lila  
Dell Adela, Adelaide, Delilah  
Della Same as for Dell  
Delores Dee, Dodie, Lola  
Delpha Philadelphia  
Delphine Del, Delf, Delphi  
Demerias Dea, Maris, Mary  
Diane Di, Dicey, Didi  
Diana Same as for Diane  
Dickson Dick  
Dominic Dom, Nick, Nicky  
Dorinda Dora, Dorothea  
Doris Dora  
Dorothea Doda, Dora  
Dorothy Dee, Dolly, Dot, Dotha, Dottie, Dotty  
Douglas Doug  
Drusilla Silla  
Duncan Dunk  
Earnest Ernie  
Ebenezer Eb, Eben

Edith Dicey, Edie  
Edmund Ed, Ned, Ted  
Edna Edny  
Edward Same as for Edmund  
Egbert Bert, Burt  
Eileen Helen  
Elaine Helen, Lainie  
Elbert Albert  
Eleanor Elaine, Ella, Ellen, Helen, Lanna, Leonora, Nell, Nellie,  
Nora  
Elena Helen  
Elijah Eli, Lige  
Elisa Lisa  
Elisha Eli, Ellis, Lish  
Eliza Elizabeth  
Elizabeth Bess, Bessie, Beth, Bethia, Betsy, Bette, Betty, Dicey,  
Elis, Elise, Ibbby, Libby, Liz, Liza, Lizabeth, Lizzie, Tess  
Ella Eleanor (plus Eleanor's nicknames), Gabriella, Helen,  
Luella  
Ellie Same as for Ella  
Ellen Helen, Nell, Nellie  
Ellender Ellen (plus Ellen's nicknames)  
Elmira Mira  
Eloise Heloise, Louise  
Elsie Alice, Elizabeth (plus Elizabeth's nicknames)  
Elvira Elvie  
Elysia Lisa  
Emanuel Manny, Manuel  
Emily Emma, Emmie, Erma  
Eric Rick, Ricky  
Ernest Same as for Earnest  
Ernestine Erna, Tina, Teeny  
Erwin Irwin  
Estella Essy, Stella  
Esther Essie, Hester  
Eudora Dora  
Eugene Gene  
Eugenia Genie, Jenny  
Eunice Nicie  
Evangeline Evan, Ev, Vangie  
Evelyn Ev, Eve  
Ezekiel Ez, Zeke  
Faith Fay  
Fidelia Delia  
Felicia Fel, Feli, Felix  
Felicity Flick, Tick  
Ferdinand Ferdie, Fred

Ferdinando Same as for Ferdinand  
Florence Flo, Flora, Florrie, Floss, Flossie  
Floyd Lloyd  
Frances (F) Fan, Fanny, Fran, Fran[n]jie, France, Frankie, Franz,  
Sis  
Francis (M) Frank, Franz  
Frederick Derick, Fred, Fredric, Freddie, Frish, Fritz  
Gabriel (M) Gabe  
Gabrielle (F) Gabby  
Genevieve Gency, Jenny, Jincy  
Geoffrey Geoff, Jeff, Jeffrey  
George Jorge  
Georgia Georgianna  
Gerald Gerry, Jerry  
Geraldine Dina, Gerri, Gerrie, Jerry, Deannie  
Gerhardt Gay  
Gertrude Gatty, Gertie, Trudy  
Gilbert Bert, Bertie, Glb, Gil, Wilber  
Gloria Glory  
Gretchen Margaret  
Gregory Greg  
Griselda Grissel  
Gutavus Gus  
Gwendolyn Genny, Gwen, Wendy  
Hamilton Ham  
Hannah Anna, Hattie, Nan, Nanny, Susannah  
Heather Hetty  
Herman Harman  
Harold Hal, Hank, Harry  
Harriet Hattie, Hatty  
Harry Harold, Henry  
Haseltine Hassie  
Helen Aileen, Eileen, Elaine, Eleanor, Ellen, Lena, Nell, Nellie  
Heloise Eloise, Lois  
Henrietta Etta, Hank, Hetty, Nettie, Retta  
Henry Hal, Hank, Harry, Hen, Hence, Hoy  
Herbert Bert, Herb  
Hester Ester, Hessy, Hetty  
Honora Honey, Nora, Norah, Norry  
Horace Harry, Horatio  
Hortense Harty, Tensey  
Hosea Hosey, Hosie  
Howard Hal, Howie  
Hubert Hugh, Hugo, Bert  
Ian John  
Ignatius Iggy, Nace, Naz  
Ignatzio Same as for Ignatius

Immanuel Emmanuel, Manuel, Manny  
India Indie, Indy  
Inez Anges  
Iona Onnie  
Irene Rena, Rennie  
Irvin Irv, Irving  
Irwin Erwin  
Issac Ike, Zach, Zeke  
Isabella Bella, Belle, Cybilla, Elizabeth, Ib, Issy, Nib, Sabe,  
Sabra, Sibella, Tibbie  
Isabelle Same as for Isabella  
Isadora Dora, Issy  
Isaiah Zadie, Zay  
Isidore Izzy  
Isidora Izzie, Izzy  
Iva Ivy  
Ivan John  
Jacob Jake  
Jacqueline Jackie, Jacque, Jacquie  
Jackson Jack  
James Jamie, Jim  
Jane Janet, Janie, Jessie, Jenny, Jinsey, Joan, Joanna,  
Virginia  
Jannett Nettie  
Jasper Casper, Jap  
Jayme Jaime, Jay  
Jean Jennie, Joanna  
Jeanette Jeanne, Nettie  
Jedediah Diah, Dyer, Jed  
Jeffrey Geoffrey, Jeff  
Jemima Jemma, Mima  
Jennet Jenny, Jessie  
Jennifer Jan, Jen, Jenny, Winifred  
Jeremiah Jeremy, Jerry  
Jerita Rita  
Jessica Jess, Jesse, Jessie, Sica  
Jincy Jane (plus Jane's nicknames)  
Jinsy Jane (plus Jane's nicknames)  
Jessie Jane (plus Jane's nicknames), Janet, Jess, Jessica  
Joanna Jane (plus Jane's nicknames), Jean, Joan, Jody, Johanna  
John Hans, Hanz, Ian, Ivan, Jack, Jean, Jehu, Jayhugh,  
Jock, Johnny, Johnathan, Juan  
Johannes John (plus John's nicknames)  
Johnathan John (plus John's nicknames), Jon, Nat, Nathan  
Joseph Joe, Joey  
Josepha Jo, Joey, Josey, Penny  
Jesephine Jo, Joey, Josey, Fina, Penny

Josetta Jettie  
Joshua Josh  
Joyce Joy  
Juanita Nita  
Judah Jude, Juder  
Judith Juda, Jude, Judi, Judie, Judy  
Julia (F) Jill, Julie, Juliet  
Julian (M) Julius, Jule  
Justin Justus  
Katarina Catherine, Tina  
Katherine Kat, Kate, Katie, Katy, Kitsey, Kitty – See Catherine for more  
Kathleen Same as Catherine  
Kayla Kay, Kay-Kay  
Kendra Kay, Kenny, Kenj, Kenji  
Kristel Kris – See Crystal for more  
Kristine Kissy, Kris, Krissy  
Kristopher Kris  
Lauren Laurie, Ren  
Laurinda Laura, Laurie, Lori  
Lauryn Laurie  
Laveda Veda  
Laverne Verna  
Lavinia Vina, Viney, Vonnie, Wyncha  
Lavonia Same as Lavinia  
Louvinia Same as Lavinia  
Lawrence Larry, Lars, Laurence, Lawrie, Lon, Lorry  
Leanne Annie, Lea  
Lee Lemuel  
Lemuel Lee  
Leonard Leo, Leon  
Leonor Elenor, Eleanor, Honor, Nora  
Leonora Same as Leonor  
Leonore Same as Leonor  
LeRoy Lee, Roy  
Leslie Les, Lester  
Levone Von  
Levonne Same as Levone  
Lillian Lil, Lilly, Lolly, Odie  
Lincoln Link  
Lionel Leon  
Lois Heloise, Louise  
Loretta Etta, Laura, Lorrie, Retta  
Lorinda Laura  
Lourinda Laura  
Lorraine Lori, Lorrie  
Lotta Charlotte, Charlotta

Lotty Charlotte, Charlotta  
Louis Lewis, Lou, Louie  
Louise Eliza, Eloise, Lois, Lou, Lulu  
Louvenia Vina, Viny  
Lavinia Vina, Viny  
Lucia Lucie, Lucy  
Lucias Lucas, Luke  
Lucille Ceall, Cille, Lucy  
Lucinda Cindy, Lucy  
Lucretia Creasey  
Luella Ella  
Lunetta Nettie  
Mabel Amabel, Mehitabel  
Mackenzie Kenzy, Mac, Mack  
Madeline Lena, Maddie, Madge, Maggie, Maud, Middy  
Madison Maddy, Mattie  
Magdalena Maggie  
Mahala Haley, Huldah  
Malcolm Mac, Mal, Malc  
Malinda Lindy  
Malissa Elizabeth, Missa  
Manerva Eve, Minerva, Nerva, Nervie  
Manuel Emanuel, Manny  
Marcus Marc, Mark  
Margaret Daisy, Greta, Madge, Maggie, Maisie, Marge, Margo,  
Meg, Megan, Metta, Midge, Peg, Peggie, Peggy  
Margarita Margaret (plus Margaret's nicknames), Rita  
Mariah Maria, Mary  
Marian Marianna  
Marilyn Mary  
Marissa Rissa  
Marjorie Madge, Marge, Margie  
Marsha Marcie, Mary  
Martha Marnie, Mart, Marty, Mat, Mattie, Patsy, Patty  
Marvin Marv, Merv, Mervyn  
Mary Demaris, Mae, Mamie, Maria, Mariah, Marie, Marietta,  
Marion, Marueen, Maura, May, Minnie, Mitzi, Moira,  
Mollie, Polly  
Matthew Matt, Matthias  
Mathilda Patty, Tillie  
Maureen Mary  
Maurice Maury, Morris, Mossie  
Mavine Mave  
Mavery Mave  
Maxine Max, Maxi  
May Mae  
McKenna Ken, Kenna, Meaka

Medora Dora  
Megan Meg  
Melinda Linda, Lindy, Mel  
Melissa Alyssa, Lisa, Mel, Milly, Missy  
Mellony Mellia  
Melody Lodi  
Melvin Mel  
Melvina Mel, Vina  
Mercedes Merci, Mercy, Sadie  
Michael Mickey, Mike, Mitchell  
Michelle Mickey, Micki, Micky, Shelly  
Mildred Mell, Milly, Mimi  
Millicent Milly  
Minerva Mina, Minnie, Nerva, Nervie  
Miranda Mandy, Mari, Mira, Randi, Randie, Randy  
Miriam Mary, Mitzi  
Mitchell Michael, Mitch  
Mitzi Mary  
Monet Nettie  
Monica Monna  
Monika Monna  
Montgomery Gum, Monty  
Mortimer Mort  
Moses Amos, Mose, Moshe, Moss  
Muriel Mur  
Myrtle Mur  
Nadina Dee, Deedee, Nada, Nadine  
Nadine Nadina (plus Nadina's nicknames)  
Nancy Agnes, Ann, Nan, Nance, Nannie  
Naomi Omi  
Napoleon Leon, Nap, Nappy, Poley, Pony  
Natalia Nattie, Natasha  
Natalie Same as Natalia  
Natasha Same as Natalia, plus Nat, Tasha  
Nathaniel Johnathan, Nat, Nate, Natty, Nathan, Tan  
Nelson Nels  
Nicholas Nick, Nicky  
Nicodemus Same as Nicholas  
Nicole Cole, Nikki, Nikky, Nole  
Nora Nonie  
Nowell Noel  
Octavia Tave, Tavia  
Odell Odo  
Olive Ollie  
Olivia Same as Olive, plus Livia  
Oliver Ollie  
Orilla Ora, Rilly

Orlando Roland, Lando  
Orphelia Phelia  
Oswald Ossy, Waldo  
Otis Ode, Ote  
Pamela Pam  
Pandora Dora  
Patience Pat, Patty  
Patricia Pat, Patsy, Patty, Tricia, Trish, Trixie  
Patrick Paddy, Pat, Patsy, Peter  
Paula Pauline, Polly  
Pauline Polly  
Penelope Neppie, Penny  
Percival Perce, Percy  
Permelia Mellie, Millie, Milly  
Pernetta Nettie  
Persephone Seph, Sephy  
Petronella Nellie  
Philip Filip, Phil, Pip  
Philadelphia Delphia  
Philomena Mena, Almena  
Phoebe Fifi  
Prescott Pres, Scott  
Priscilla Cil, Cilla, Ciller, Prissy, Siller  
Providence Provy  
Prudence Densy, Prudy  
Rachel Rae, Ray, Raech  
Raphael Raff  
Ramona Mona  
Raymond Ray  
Rebecca Becca, Beck, Beckie, Reba  
Regina Gina, Rae, Ray  
Reginald Reg, Reggie, Rex, Reynold  
Reuben Rube, Ruby  
Reynold Reginald  
Rhoda Rodie  
Rhyna Rhynie  
Richard Dick, Rich, Richie, Ritch, Ritchie  
Robert Bob, Dob, Dobbin, Rob, Bobby, Robin, Rupert  
Robertta Bert, Berta, Bobbie, Robbie  
Roderick Erick, Rod, Rickie  
Roger Hodge, Hodgekin  
Roland Orlando, Rowland  
Roscoe Ross  
Roxane Rox, Roxie  
Roxanne Same as Roxan  
Rudolph Dolph, Rolf, Rollo, Rudy  
Rufina Fina

ReFina Same as Rufina  
Russell Russ  
Ryan Ry  
Sabrina Bri, Brina, Sabby, Sabra  
Salome Loomie  
Salvador Sal  
Salvadore Same as Salvador  
Samantha Mantha, Sam, Sammi, Sammy  
Samson Sam  
Sampson Same as Samson  
Samuel Sam, Sonny  
Sandra Alexandra, Sandy  
Sanford (M) Sandy (M)  
Sara Cera, Sadie, Sal, Sallie, Sarai, Sukie, Surry  
Sarah Same as Sara  
Sarilla Silla  
Sarina Rena  
Serina Same as Sarina  
Savannah Anna, Nan, Vannie  
Scott Sceeter, Squat, Scottie  
Sebastian Sebby  
Serena Same as Sarina  
Serilla Rilla  
Shaina Sha, Shay, Sha-Sha  
Sharon Sha, Shay  
Sheila Cecilia  
Sheldon (M) Shelly (M)  
Sheridan Dan, Danny  
Sidney Dis, Sid  
Sibbilla Sibbie  
Sibbell Same as Sibbilla  
Sigfrid Sid, Sig, Sigg  
Sigfried Same as Sigfrid  
Sigismund Sig  
Silas Si  
Silence Liley  
Silvester Si, Syl, Sly, Vest, Vester  
Simeon Sim, Simon  
Solomon Sal, Salmon, Sol, Solly, Zolly  
Sondra Dre, Sonnie  
Stanley Stan  
Stefanie Annie, Stef, Stefi, Steffi, Steffie  
Stephanie Annie, Steph, Stephi, Stephe  
Stephen Step, Steve, Stevie, Steven,  
Sullivan Sully  
Susannah Hannah, Sudy, Sue, Sukey, Susan, Susie, Suzanne  
Suzanne Suki

Sybill Same as Sibbilla  
Sydney Sid  
Sylvester Same as Silvester, replace Si with Sy  
Tabitha Tabby  
Tamarra Tammy, Tammi  
Tasha Natasha, Tash, Tashie  
Temperance Tempy  
Terence Terry  
Teresa Terry, Tess, Tessie, Tyzra  
Thaddeus Tad, Thad  
Theodora Dora  
Theodore Dorey, Ted, Teddy, Theotric  
Theophilus Ophi  
Theresa Terry, Tess, Tessie, Thursa, Ticy, Tracy, Trissy  
Thomas Thom, Tom  
Thomasa Tamzine  
Thomasina Same as Thomasa  
Thomasine Same as Thomasa  
Tiffany Tiff, Tiffy  
Tilford (M) Tillie (M)  
Timothy Tim  
Tobias Tobe, Toby, Bias  
Unice Nicie  
Uriah Ury  
Ursula Sula, Sulie  
Valentina Felty, Val, Vallie  
Valentine Same as Valentina  
Valerie Val  
VanBuren Van, Buren  
Vandalia Vannie  
Vanessa Nessa, Van, Vannie  
Veronica Franky, Ronnie, Ronna, Vonnie  
Victor Vic, Vick  
Victoria Toria, Torrie, Tory, Vicki, Vikky, etc.  
Vincent Vin, Vince, Vinnie, Vinny  
Viola Ola, Vi  
Violetta Lettie  
Virginia Ginger, Ginny, Jane, Jennie, Jinie, Virgie  
Vivian Vi, Viv  
Waldo Oswald  
Wallace Wallie, Wally  
Walter Wallie, Wally, Wat  
Webster Webb  
Wendy Wen  
Wilhelmina Billie, Helmie, Minnie, Willie, Wilma  
William Bill, Bud, Will, Willy  
Willis Bill, Willy

Wilda (F) Willie (F)  
Winfield Field, Win, Winny  
Winton Wint  
Woodrow Woody  
Yeona Ona, Onie  
Yvonne Vonna  
Zachariah Zach, Zacharias, Zachary, Zeke  
Zedediah Zed