

DATA ENTRY STANDARDS MANUAL FOR BANNER USERS

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CONFIDENTIALITY/RELEASE OF DIRECTORY INFORMATION

When you first access a record that has been marked confidential, you will see the following message: "Warning: Information about this person is confidential." This tells you that the student has requested privacy under FERPA. You must not release ANY information about that student, including the fact that the student appears in our database. Even directory information must be withheld. If sending mailings, these records must be excluded except when the mailing is directly related to the person's academic program.

FACULTY, STAFF, STUDENT, ALUMNI OR CONSTITUENT IDENTIFICATION NUMBERS IN COMMUNICATIONS

- Do not store any faculty, staff, student, alumni or constituent's Social Security Number (SSN) outside of approved systems or transmit any part of it via e-mail
- Only identify faculty, staff, students, alumni or constituents using First Name, Last Name, and last four digits of the Grizzly ID number via e-mail, web calendars, and in printed reports that might be seen by parties outside of the University

SOCIAL SECURITY NUMBERS ON SPAPERS

ONLY SSN / ITIN's are to be entered into the SSN/SIN/ITN field on SPAPERS.

DECEASED NOTATION ON SPAPERS

Alumni or Constituent Deceased Notification –
University Advancement:

- If a notification is received through some means - letter, phone call, obituary notice in the paper and is not official in nature, i.e. an obituary notice, follow up by checking with the following websites:
 - a) <http://www.genealogybank.com/gbnk/ssdi/> - Free, no membership required, and preferred one used by University Advancement
 - b) <http://www.nationalobituaryarchive.com/> - Free and no membership required
 - c) <http://www.obituaries.com/ns/obituariescom/obits.aspx> - Free and no membership required
 - d) <http://deathnotices.michigan.com> - Free and no membership required
 - e) www.ancestry.com – Free 14 day trial, but monthly membership fees assessed after trial period
- If more verification is needed, check the following:
 - a) Check to see that the name is an EXACT match
 - b) Check the age of the person
 - c) Check to see if the city in which the person lived is a match
 - d) Contact the funeral home

- If you cannot verify the death, do not code the record as deceased but refer the information to the University Advancement Division **at 248-364-6110 or giftacct@oakland.edu** who will conduct further research, make the changes and will complete additional steps as stated in the Advancement Procedure manual.
- If proper notification or verification has been found continue with the instructions below to code the record.
 - a) Go to the form %AIDEN
 - b) Enter the I.D. number or search for the correct I.D. (Even if you have an I.D., do a name search to make sure there isn't a duplicate record.)
 - c) Click on the "Biographical" tab.
 - d) Click on the "Deceased" indicator box (a check mark will appear).
 - e) Enter the deceased date if known.
 - f) Save the record.
 - g) Go to the "address" tab in the %AIDEN and inactivate the record holder's address.

Once the record is coded as deceased, a Banner Workflow e-mail will automatically be generated. This e-mail will notify:

Academic Human Resources	ahr@oakland.edu
Academic Records	acadrec@oakland.edu
Advancement Services	advanceservices@oakland.edu
Annual Giving	give2ou@oakland.edu
Benefits	benefits@oakland.edu
Gift Accounting	giftacct@oakland.edu
Graduate Study	gradstudy@oakland.edu
Housing	housing@oakland.edu
International Students & Scholars	isso@oakland.edu
Office of Institutional Research & Assessment	oir@oakland.edu
Payroll	payroll@oakland.edu
School of Education & Human Services	sehs@oakland.edu
Stewardship	give2ou@oakland.edu
Student Business Services	collect@oakland.edu
Undergraduate Admissions	SAT@oakland.edu
University Communication & Marketing	oumag@oakland.edu
University Human Resources	uhr@oakland.edu

The Gift Accounting staff will be reviewing all Alumni and Constituent records that were coded as deceased to insure that the deceased procedure was followed.

Employee Deceased Notification:

- If an employee receives notification that an employee is deceased, refer to [Policy 455 Death of Faculty, Staff and Retiree and Floral Tributes](#)
- Upon notification, AHR and UHR will inactivate any active (00) Local, (01) Primary, (HR) Human Resources, and (OF) Office addresses. (Note: inactivating

active addresses prevent the address record from being included in Access query output for mailings.)

Student Deceased Notification:

- If an employee receives notification that a student is deceased, any pertinent information (obituary, etc.) should be forwarded to the Office of the Registrar - Academic Records so that the death can be confirmed and the student record appropriately updated including inactivating all active addresses. (Note: inactivating active addresses prevent the address record from being included in Access query output for mailings.)
- If a request is made from a person who has a deceased warning, refer the student to the Office of the Registrar. **DO NOT TELL THE STUDENT THAT THERE IS A DECEASED WARNING ATTACHED TO THEIR RECORD.**
- When a person marked as deceased requests records and neither the Registrar nor Alumni Office has any documentation substantiating the death, the deceased notation should be removed.
- If a request is made from a person for whom one of these offices has documentation of the death, direct the student to the Office of the Registrar. That office can request advice from General Counsel. General Counsel will tell them how to proceed.

Applicant/Pre-Student Deceased Notification:

- The following applies to persons with admissions application records and no registration records. If registration records exist, please refer to the Student Deceased Notification section above.
- If an employee receives notification that an applicant (prior to enrollment in the University) is deceased, any pertinent information (obituary, etc.) should be forwarded to either the Undergraduate Admissions Office or the Office of Graduate Study, depending on the type of application, so that the death can be confirmed and the applicant record appropriately updated including inactivating all active addresses. (Note: inactivating active addresses prevent the address record from being included in Access query output for mailings.)
- If a request is made from a person who has a deceased warning, refer the student to either the Undergraduate Admissions Office or the Office of Graduate Study. **DO NOT TELL THE STUDENT THAT THERE IS A DECEASED WARNING ATTACHED TO THEIR RECORD.**
- When a person marked as deceased requests records and neither the Undergraduate Admissions Office nor the Office of Graduate Study has any documentation substantiating the death, the deceased notation should be removed.
- If a request is made from a person for whom one of these offices has documentation of the death, direct the student to the Undergraduate Admissions Office or the Office of Graduate Study. That office can request advice from General Counsel. General Counsel will tell them how to proceed.

COMMON MATCHING

Common Matching is a feature in Banner that assists in creating and managing basic person information in order to prevent the creation of duplicate records. The Common Matching process checks for existing person and company identification records by searching through the database and identifying every account that matches the Core Matching Elements before a new record is added to the database. Each department that creates Banner ID numbers determine the Core Matching Elements that they will use for identifying a potential match and build the rule set in Banner. Core Elements may include Name/ID, Address, Telephone, E-mail, Date of Birth, Gender, SSN, etc.

Common Matching will check the entire database of Banner ID numbers and display potential matching Banner ID data including Name, Address, Telephone, E-mail, Date of Birth, Gender, and or SSN, prior to the creation of a new Banner ID number. To start a search in GOAMTCH the only information that needs to be filled out is the Last Name field. If the First Name field is filled in with information, Common Matching will match that entry against a list of common names (GORNAME) synonymous with the First name provided. For example, Jon Smith will match to John Smith.

If enough of the fields match with an existing record, Common Matching will classify that record as a Match or Potential Match and ask you to verify the record. In the example below the First Name, Last Name and SSN matched to only 1 record, the record is listed in the Match section. The system also listed 55 records as potential matches because they contain either the First Name, Last Name or last 4 digits of the SSN.

Common Matching Entry GOAMTCH 9.3.12 (TEST)

ID: GENERATED Matching Source: AS_PERSON Advancement - person search

DATA ENTRY

Last Name: Oliver
 First Name: Linda
 Middle Name:
 Address Type: 01 Primary
 Street Line 1:
 Street Line 2:
 Street Line 3:
 City:
 State or Province:
 ZIP or Postal Code:
 County:
 Nation:
 Non-Person Name:
 SSN/SIN/TIN: 04767
 Birth Date: Day Month Year
 Gender: Null
 Telephone Type: 01 Primary
 Telephone:
 E-mail Type: OTHR Other
 E-mail:
 Additional ID Type:
 Additional ID:
 Duplicate Check
 Select ID
 Details
 Update ID
 View Comments
 Create New

MATCH

Match Potential Matches 55

MATCH

ID: G00730217
 Name: Linda S Oliver
 SSN/SIN/TIN: 04767
 Birth Date: 12/28/1951
 Gender: F
 Street Line 1:
 Street Line 2:
 Street Line 3:
 Matched Address:
 Telephone:
 E-mail:
 Additional ID:
 All Addresses:
 All Telephones:
 All E-mails:
 Matching Rule Sets: 1=Primary SSN/SIN/TIN Match.Last Name/Non-Pe
 Clear and Return to Data Entry

BANNER SEARCH PROCEDURES

General Search Procedures:

Search Banner thoroughly before:

1. Entering a new person or non-person record to ensure that a duplicate record is not created.
2. Making changes to an existing record to ensure you are updating the correct record.

If a Banner ID number (Grizzly ID or Vendor ID) is available, enter it, and then compare the following information to ensure your record is unique or correct:

- Grizzly ID
- Date of Birth
- Address and/or phone number
- E-mail address
- Middle Initial
- Federal ID number (SSN, EIN, or TIN) (if you have access to view the number)

PERSON SEARCH PROCEDURES

- If a Banner ID number is available, enter it in the ID field in the %IDEN form (SPAIDEN, PPAIDEN, FOAIDEN or APAIDEN) and alt-page down (next block). Double check to be sure you have found the correct record. Click on the “...” at the end of either First Name or Last name. The message, “*Warning* Similar names exist. Would you like to view them?” appears. Click on the %IDEN option to view the listings. If a Banner ID is not available or no match is found, then proceed to the next step.

If a Banner ID number is not available, within the key block (area at top of form where ID/name is displayed) of %IDEN; tab once, type in the name (Last Name, First Name) and press tab. Wildcard characters can be used to expand your search if needed: “%” matches a string and “_” matches a character. If a social security number is available and one match is found, double check to be sure you have found the correct record. If there is more than one potential match, the ID and Name Extended Search dialog box opens up. When you click the down arrow after the Results field, you can scroll through all the matches. If you have middle initial or the last 4 digits of the Banner ID number, you can potentially identify the correct one from the list. You also have the option to reduce the search by person or non-person. This search by name works on other non-%IDEN forms.

- If you do not have the first and last name, in %IDEN, place the cursor in the ID field and press F9 (the Person Search Form (SOAIDEN) appears), or click “...” next to the ID field and select one of the available search options.
 - o If you have the last four digits of the persons Banner ID number, then type %#### in the ID field where the #### is the last four digits. Then tab over the Last Name field and enter the Last Name. Press the F8 key or the “Go” button to start the search. If a potential match is not found, then,

- o In the Last Name field, type in the first few letters of the Last Name followed by the percent sign (%) and the first letter or first few letters of the First Name followed by the % sign (Example: Smi%, J%) and press the F8 key or the “Go” button to search. Verify that the Case Insensitive Query radio button is selected. If you find more than one possible match, try the detailed search.
 - From the search form, select Search and Display More Detail (SOAIDNS) using the Related menu. The name will appear on the detail search form. Press F8. Address information and student data will appear in different blocks of the form. Scrolling through the various types of data may help you to identify the specific record you need. If the record you are querying is not a match, exit the detail form and select the next record in the list.
- o The Change Indicator column provides information regarding name and ID changes. If a “Name” appears in the column, the “person” has had a name change in Banner. If an “ID Change” appears in the column, the “person” has had an ID change in Banner. You may select either record that appears for a “person” and the most recent information will be displayed.
- o Use the Search Using Sounds Like in the Options menu to search for familiar sounding last names such as St, Saint and Mac, Mc.
- o Try reversing first and last names for foreign names when conducting person searches.
- o For a person with a hyphenated last name, use the full hyphenated name and each individual name separately. Example: If searching for Jenny Smith-Jones, the search should be performed three times using Last Name = “Smith-Jones”, Last Name = “%Smith%”, and Last Name = “%Jones%”.
- o If a match is still not found, perform another search as described above using a previous or maiden name, if available.
- If a match is found, select the person from the query results by double clicking on the name or using the select button.
- If no match is found, but you have reason to believe the person/entity has had a prior relationship with the university (student, employee, or constituent), contact the appropriate office before creating a new person / entity record on the appropriate Identification or Vendor Maintenance form for the module in use.

NON-PERSON SEARCH PROCEDURES -

- If a Banner ID number is available, enter it in the ID field in the %IDEN form (SPAIDEN, PPAIDEN, FOAIDEN or APAIDEN) and alt-page down (next block). Double check to be sure you have found the correct record.

If a Banner ID number is not available, within the key block (area at top of form where ID/name is displayed) of %IDEN; tab once, type in the name (Business Name or a partial business name) and press tab. Wildcard characters can be used to expand your search if needed: “%” matches a string and “_” matches a character. You also have the option to reduce the search by non-person.

- If you do not have the full business/non-person name, in %IDEN, click “...” next to the ID field and select one of the available search options (Non-Person Search - SOACOMP).
 - If you have the last four digits of the non-persons Banner ID number, then type %#### in the ID field where the #### is the last four digits. Press the F8 key or the “Go” button to start the search. If a potential match is not found, then,
 - In the Name field, type in the first few letters of the Business/Non-Person Name followed by the percent sign (%) (Example: %Health% or Physical%) and press the F8 key or the “Go” button to search.
- If a match is found, select the non-person from the query results by double clicking on the name or using the select button.
- If no match is found, but you have reason to believe the entity has had a prior relationship with the university (constituent or vendor), contact the appropriate office before creating a new entity record on the appropriate Identification for the module in use.

VENDOR SEARCH PROCEDURES

- Go to the FTMVEND form.
- Click on the vendor search arrow. This will take you to the FTIIDEN form.
- Tab to the Last Name field and key in the required information as follows:
 - a. A meaningful portion of the vendor name with the wild card “%” before and after as necessary. This field is case sensitive
*Example: SmithGroup could be entered as
%Smith%Group%*
 - b. Execute the query (press F8).
 - c. If the entity is found, double click on the vendor number to select. This will bring Banner back to **FTMVEND** with the vendor selected. Perform a next block (press CTRL PgDn). Click on the “Address” tab and look up appropriated purchase order (“PO”) or pay to (“PT”) address by scrolling. If the correct address is not associated with the vendor:
 - i. To request a new PO address, contact Purchasing
 - ii. To request a new PT address, attach a completed Vendor Maintenance Form to your payment voucher and send to Accounts Payable.
 - iii. If the correct address is listed, you can use the vendor number, address type and sequence on your paperwork.
 - d. If searching for a person (as a vendor), follow the same procedure using the person’s last name. If the vendor does not appear, you can search on “all” Banner entities by rolling back using the “Rollback Button”. After this,

check the box next to “all” at the top of the form. Perform a next block. The form will go into query mode after a minute. You can then perform steps a – c again.

- e. When searching for a vendor under a “government name”, if the vendor name begins with a phrase such as “Department of . . .” the government name should precede the phrase.
 - i. Use the wild card “%” before and/or after part of the name as necessary. This field is case sensitive.

Example: State of Michigan Depart of Agriculture

City of Pontiac Dept of Agriculture could be entered as State%of% or %Depart% or Department of%

Prior to adding a new vendor, perform a search on FOAIDEN using either FOIIDEN or FOICOMP to make sure the entity is not in Banner already as a student, alumnus, employee or third-party. FOICOMP will also perform a non-case sensitive search to identify different forms of a non-person name.

For example: SmithGroup or Smithgroup

GENERAL NAME RULES

- All departments agree to use the standard rules of data entry for all Banner modules.
- All data entered into a field should be entered using uppercase and lowercase letters. All uppercase or all lowercase letters should never be used, except in the case of formal business names. (e.g. ‘IBM’ or ‘priceline.com’).
- Abbreviations should not be used when entering data unless specified in this document.
- Departments should only make name changes to records owned by them unless otherwise specified in this document.
- For all name change requests, the employee processing the name change must check the System Identification form, GUASYST, to see if the person is a student, financial aid applicant, alumni and/or employee. **If you are not sure that you are authorized to change a name – DON’T CHANGE IT.**
- If a person has requested use of a preferred name, but has not legally changed their name, the legal name cannot be changed. **Only the preferred name field can be changed to reflect this request.**
- For an employee, the name MUST be entered in Banner as it appears on the employee’s Social Security Card. If the employee’s current name is not reflected on his/ her Social Security Card, they will be instructed to visit the Social Security Administration office to change the name and return with the new card before the name change can be processed.
- For students who are not employees or federal aid recipients, a certified marriage certificate, divorce decree, U.S. Passport or Official US Court Change of Name document authorizing the name change must be presented.
- Name changes for international students require a change in immigration documents. As a general rule passports, immigration documents, social security

cards, and student record names must all match. Name changes must be made with the International Students and Scholars Office (ISSO).

- **Accounts Payable, Financial Aid, University Human Resources, Office of the Registrar, Purchasing, International Students & Scholars Office (ISSO) and University Advancement are the only areas that make name changes.**

Note: The Graduate and Undergraduate Admissions Office will make a name change based on a telephone call **IF** the student has not registered or created accounts receivable transactions.

DATA CUSTODIANSHIP

Custodianship means who ‘owns’ the data; owners have update capabilities; owners are to be contacted regarding any issues with that data. The Shared Data Committee finalizes all data entry standards with the approval of the custodian.

<i>If the PERSON/ENTITY is a:</i>	<i>then the custodian of the NAME is:</i>
International Student	International Students & Scholars Office (ISSO)
Financial Aid Recipient	Financial Aid Office of the Registrar Payroll School of Medicine University Human Resources (UHR)
Staff Employee	University Human Resources (UHR)
Student Employee	Financial Aid Office of the Registrar
Faculty/Research Employee	Academic Human Resources
Student Applicant	Admissions Office of the Registrar Graduate Office School of Medicine
Enrolled Student	Office of the Registrar Undergraduate Admissions Graduate Admissions School of Medicine
Vendor	Purchasing Accounts Payable Student Business Services
Former Student (not an OU graduate)	Office of the Registrar School of Medicine
Alumnus/Alumna (OU Graduate)	Advancement Services Office of the Registrar School of Medicine
Constituent	Advancement Services
Graduate Assistant	Graduate Office Office of the Registrar
Alumni (Employee)	Advancement Services University Human Resources (UHR) Office of the Registrar

DATA CUSTODIANSHIP OF NAMES

Only custodians are allowed to make name changes when they are presented with the required paperwork.

The specific field of data governed by this ownership is the name. Name changes only.

INTERNATIONAL STUDENT

Name changes for international students require a change in immigration documents. As a general rule passports, immigration documents, social security cards, and student record names must all match. Name changes must be made with the International Students and Scholars Office (ISSO), 157 North Foundation Hall, 248-370-3358.

FINANCIAL AID RECIPIENTS

Changing names on financial aid student records: the LAST name of a financial aid student MAY NOT BE CHANGED regardless of documentation unless the student has first made the change with the Social Security Administration.

Some changes, such as the spelling of a first name or middle initial do not result in a problem for financial aid and should be allowed with submission of the proper ID such as a driver's license. It is just very important that the last name not be changed until the change has been made with the Social Security Administration (NOT the IRS).

NAME TYPES

Alumni Requested (AREQ)

Only used by University Advancement. This type is used when an Alumni changes their name with OU based on a gift or pledge or Alumni membership and legal documentation for the name change is not provided.

Maiden (MAID)

Currently, only University Advancement is using this type. Use this name type on the original name when a name change is processed due to marriage and you know it to be the maiden name.

Student Name (STDN)

Used by University Advancement and the Registrar's Office. This type is used when an Alumni changes their name with OU based on a gift or pledge or Alumni membership and legal documentation for the name change is not provided and should be made in conjunction with AREQ (above).

If the alum does not want to provide the necessary documents to have their transcript printed in their current name, this procedure allows the registrar's office to issue a transcript in their student name.

Name changes for international students require a change in immigration documents. As a general rule passports, immigration documents, social security cards, and student records names must all match. Name changes must be made with the International

Students and Scholars Office (ISSO), 157 North Foundation Hall,
248-370-3358.

NAME STANDARDS

Name changes are only allowed by data custodians in conjunction with the proper paper work.

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

<i>Form</i>	<i>Module</i>
SPAIDEN	Student
PPAIDEN	Human Resources
FTMVEND	Finance (vendors)
FOAIDEN	Finance
APAIDEN	Advancement/Alumni

The available fields on the above forms include Last Name, First Name, and Middle Name. Prefix, Suffix, and Preferred First Name appear only on SPAIDEN, PPAIDEN and APAIDEN.

REMEMBER THAT ALL OF THE GENERAL NAME AND ADDRESS RULES APPLY TO THE ABOVE FORMS

NAMES – General Standards

Acceptable characters for use in name fields (last, first, middle) include:

- Latin characters A-Z, a-z
- Expanded accented Latin Characters supported by Banner Common Matching and search:
ÀÁÂÃÄÅÇÈÉÊËÌÍÎÏÑÒÓÔÕÖØÙÚÛÜÝàáâãäåçèéêëìíîïñòóôõöøùúûüý
- Hyphen
- Space
- Apostrophe
- Period

LAST NAME

- Maximum field length is 60 characters
- Hyphens may be used to separate hyphenated last names with no spaces. If there are two last names that are not hyphenated, the two names would also be placed in the last name field with a space between the two names.
 - Example: Mary Ann Smith Lee
 - ➔ Mary = First Name
 - ➔ Ann = Middle Name
 - ➔ Smith Lee = Last Name
- In an alpha sort, this person would appear with the 'S' names.

FIRST NAME

- Maximum field length is 60 characters.
- In cases where a single character is designated as the first name followed by a full middle name, place the single character and the middle name in the first name field.
 - Example: E Evelyn Smith
 - ➔ E Evelyn = First Name
 - ➔ blank = Middle Name
 - ➔ Smith = Last Name
- Spaces are permitted between multiple names. If an individual has two names in their first name and you can tell because a middle initial has also been provided, both names should be entered in the first name field with a space between the names.
 - Example: Anne Marie S Smith
 - ➔ Anne Marie = First Name
 - ➔ S = Middle Name
 - ➔ Smith = Last Name
- If two names are provided and no middle initial is provided, enter the "first" name in the first name field and the "second" name into the middle name field.
 - Example: Anne Marie Smith
 - ➔ Anne = First Name
 - ➔ Marie = Middle Name
 - ➔ Smith = Last Name

PREFERRED FIRST NAME

- Maximum field length is 60 characters.
- If no Preferred First Name is provided, leave the field blank.
- Preferred First Name is for information only, it does not appear on Banner reports.
- Spaces are permitted for double first names such as Ruth Ann or Billy Joe.
- Not generally used.

MIDDLE NAME

- Maximum field length is 60 characters.
- If no middle initial is provided, leave the field blank.
- Periods following middle initial are acceptable, but not recommended.
- Spaces are permitted between multiple names.
- Do NOT use title, prefixes, or suffixes in the Middle Name field.

PREFIX

- Maximum field length is 20 characters.
- Prefixes should not be used for students, employees, alumni, or constituents
- The field may be left blank.
- Punctuation should not be used for prefixes.

The following chart provides examples of acceptable prefixes:

<i>Prefix</i>	<i>Description</i>
1st Lt	First Lieutenant
Atty	Attorney
Br	Brother
Capt	Captain
Cmdr	Commander
Dr	Doctor
Fr	Father
Hon	Honorable
Lt Col	Lieutenant Colonel
Maj	Major
Ms	Either Married or Single Status
Miss	Single Status
Mr	Mister
Mrs	Married Woman
Pres	President
Prof	Professor
Rabbi	Rabbi
Rep	Representative
The Rev	The Reverend
Sr	Sister
VP	Vice President

SUFFIX

- Maximum field length is 20 characters.
- The field may be left blank.
- Punctuation should not be used for suffixes; however, Banner will display commas when viewed.

<i>Suffix</i>	<i>Description</i>
CPA	Certified Public Accountant
II **	The Second
III **	The Third
IV **	The Fourth
DDS	Doctor of Dentistry
DVM	Doctor of Veterinary Medicine
JD	Jurist Doctor

Jr **	Junior
LLD	Doctor of Law
MD	Doctor of Medicine
PhD	Doctor of Philosophy
RN	Registered Nurse
Sr **	Senior
Esq	Esquire
DO	Doctor of Osteopathic Medicine

**** Denotes the only suffixes that should be used for students.**

CORPORATION / THIRD-PARTY PAYERS (FTMVEND)

- All vendors who are not individuals and all third-party payers should be entered in the corporation field.
- Maximum field length is 60 characters.
- Use the complete vendor name, including the words “The”, “And”, “An”, etc.
- Use standard capitalization rules, except when part of a company name.
 - Example: ‘RSKCo Claims Services Inc’ or ‘eBay Inc’
- Departments need to reflect the legal name of a company on any documents submitted for vendor maintenance in Banner, such as the Vendor Maintenance form or a Purchase Requisition. As such, do not omit any words or suffixes denoting the legal form of the entity.
 - Example: Inc, Incorporated, Corp, Ltd, Limited, PC, or LLC
- If a government name begins with a phrase such as “Department of ...” the government name should precede the phrase.
 - Example: US Department of Agriculture
- No spaces should be entered in the corporation field for names such as AT&T Wireless, MacArthur, or VonDubrow.
- To conform to postal regulations, do NOT use periods unless for an internet company.
 - Example: priceline.com
- Do not use commas in the corporation field, except for constituents.
- Hyphens and apostrophes should be entered when appropriate.
- Do not abbreviate the first word, with the exception of St (Saint) and US (United States).

The table below identifies abbreviations that may be used for other than the first word of a corporation's name:

Abbreviation	Word
Admin	Administration
&	And
Assn	Association
Co	Company
Corp	Corporation
Dept	Department
Inc	Incorporated
Intl	International
Ltd	Limited
Mfg	Manufacturing
Natl	National

SAIL SELF – SERVICE ADDRESS UPDATES

Students, faculty, and staff may submit their address changes online through the secure SAIL system using the Personal Information Link. The SAIL system allows convenient 24/7 online access from anywhere with an internet connection as well as keeping information safe and secure through a password protected system. **Online address changes through the secure SAIL system is the university's preferred way for faculty, staff and students to submit their address changes.**

If an alumni or constituent who is not an OU employee, faculty or current student requests a change to his/her Primary 01; they **will most likely not know their login information** and not be able to access SAIL. Instead, refer them to University Advancement at 248-364-6110 or giftacct@oakland.edu who will make the changes.

The address types are available for online viewing and / or updating are set on the Address Role Privileges table GOAADRL in Banner. As of December 2018, the settings were as follows:

ROLES:

<u>Address Type</u>	<u>Description</u>	<u>Comment</u>	ALUMNI		EMPLOYEE		FACULTY		FRIEND		STUDENT		FINAID	
			<u>Display Only</u>	<u>Update</u>	<u>Display Only</u>	<u>Update</u>	<u>Display Only</u>	<u>Update</u>	<u>Display Only</u>	<u>Update</u>	<u>Display Only</u>	<u>Update</u>	<u>Display Only</u>	<u>Update</u>
00	Local					X		X				X		
01	Primary			X		X		X				X		
AT	Applicant Tracking													
B2	Secondary BU-Univ Adv use only													
BI	Billing	No longer used												
BU	Business		X											
DI	Diploma Address	Not used												
FO	Foreign-for INS reporting only		X		X		X				X			
GR	Granting Agency													
HR	Human Resources					X		X				X		
LB	Library													
MA	Mailing	Not used												
OA	Office Additional					X		X						
OF	Campus Office					X		X						
PA	Parents													
PO	Purchase Order				X		X							
PT	Pay To				X		X							
SE	Seasonal			X										
UH	University Housing										X			
X	Reserved for TGRFEED Use Only	Do not use												

GENERAL ADDRESS RULES

INTERNATIONAL STUDENTS:

If the student has a Foreign (FO) type they are an international student. SEVIS rules require that the International Students Office (ISSO) report addresses for international students (00, 01, HR, FO). International students are required to keep the International Students Office informed of any change of address.

YOU MAY CHANGE the (00), (01), AND (HR) address types for these students. DO NOT CHANGE the FO type.

All FO address type changes must be made by the ISSO office. If you make changes to the 00, 01 and/or HR address type, refer any student with an FO address type to the International Student and Scholars Office (ISSO) at 248-370-3358 or isso@oakland.edu to be sure their current information is on file.

ADDRESS CHANGES:

If an individual (other than an alumni or constituent who is not an OU employee, faculty or current student) requests a change to his/her Primary 01, Local 00 or Human Resources HR address, refer them to SAIL Self Service to make the changes. Remind them that they will need to review and update all three address types as necessary.

If an alumni or constituent who is not an OU employee, faculty or current student requests a change to his/her Primary 01, refer them to University Advancement at 248-364-6110 or giftacct@oakland.edu to make the changes. They will need to review and update all three address types as necessary.

If an OU employee, faculty, or staff member requests a change to his/her Primary 01, Local 00, Office OF or Human Resources HR address, refer them to SAIL Self Service to make the changes.

Online address changes through the secure SAIL system is the university's preferred way for OU students, employees, faculty, or staff members to submit their address changes.

If you have returned mail or an address change report from an external agency review with the Primary 01, Local 00, and Human Resources HR address, update all three address types as necessary.

ALUMNI WHO ATTENDED OU AS INTERNATIONAL STUDENTS:

YOU MAY CHANGE the (00), (01), AND (HR) address types for these alumni and constituents. DO NOT CHANGE the FO type.

All FO address type changes must be made by the ISSO office. The ISSO will use an audit process to review on a regular basis if the 00, 01 or HR address has been changed on an International Student who is an Alumni (graduate of OU) to be sure their current information is on file.

If an alumni or constituent requests a change to his/her Primary 01, or Human Resources HR address, or if you have returned mail or an address change report from an external agency, review the Primary 01, Local 00 and Human Resources HR address and update each address type as necessary. In most cases, Alumni and constituents will not have access to SAIL Self Service to make the changes themselves.

HOUSING ADDRESSES:

University Housing (UH) contains residence hall addresses. **NEVER** change these addresses, even if the student says they have already moved out. Students should contact University Housing at 248-370-3570 or housing@oakland.edu if they are concerned about their housing address.

PERMANENT ADDRESSES:

Primary addresses 01 should never contain residence hall addresses or P.O. boxes. Oakland University must have a valid primary address. Alumni and constituent records may have a P.O. Box as part of their 01 address.

DATA CUSTODIANSHIP OF ADDRESSES & PHONE NUMBERS

ADDRESS TYPES: The specific field of data governed by this ownership is the address.

Code	Description	Comment	Owner(s)/Update	Update Only
00	LOCAL	Local mailing address for students.	Undergrad Admissions Grad Office Office of Student Financial Services Registrar's Office	Academic Affairs Payroll UHR Student Employment Self Service SAIL
01	PRIMARY	Mailing address for students, alumni, constituents and organizations	Undergrad Admissions Grad Office Office of Student Financial Services Registrar's Office University Advancement	Academic Affairs Payroll UHR Student Employment Self Service SAIL
AT	APPLICANT TRACKING	Applicant phone number	Undergrad Admissions	
B2	Secondary BU-Univ Adv use only	Secondary business address	University Advancement	
BI	BILLING ADDRESS	No longer in use	Student Business Services	Student Business Services
BU*	BUSINESS or WORK	Person's business address (students, alumni and constituents)	University Advancement	
DI	DIPLOMA	Address provided on the Application for Degree – where the student expects to be six months after graduation	Registrar's Office	
FO	FOREIGN	For INS reporting only. Non-Immigrant Foreign Address	International Student and Scholars Office	SEE PAGE 28 FOR FOREIGN ADDRESS RULES

Code	Description	Comment	Owner(s)/Update	Update Only
GR	GRANTING AGENCY	Address for grant contracts	Grants Office	
HR	HUMAN RESOURCES	Address to which the employee W-2's are mailed (appears on the pay check stub)	Payroll Student Employment Academic Affairs UHR	Undergrad Admissions Grad Office Office of Student Financial Services Registrar's Office University Advancement Self Service SAIL
LB	LIBRARY	Library address		
MA	MAILING	NOT USED (but system required)		
OA	CAMPUS ADDITIONAL	Employee's second office address	Employee & Employee's Hiring Department	Self Service SAIL
OF	CAMPUS OFFICE	Employee's primary office	Employee & Employee's Hiring Department	Self Service SAIL
PA	PARENTS	NOT USED (but system required)		
PO	PURCHASE ORDER	Vendor address to which purchase orders are mailed	Purchasing	
PT	PAY TO	Address to which Accounts Payable checks are mailed	Accounts Payable	
SE	SEASONAL	Address for seasonal residence	University Advancement	
UH	UNIVERSITY HOUSING	On campus housing address	University Housing	SEE PAGE 38 FOR UNIVERSITY HOUSING ADDRESS RULES
XX	RESERVED FOR TGRFEED USE ONLY	Address type inserted on invoice when no active address (00,01,HR,UH) exists	NA	NA

*Corporations or organizations should not have a BU address

TELEPHONE TYPES: This specific field of data governed by this ownership is the telephone.

Code	Description	Comment	Owner(s)/Update	Update Only
00	LOCAL	Local phone number for students	Undergrad Admissions Grad Office Office of Student Financial Services Registrar's Office	Payroll Student Employment Academic Affairs UHR Self Service SAIL
01	PRIMARY	Permanent home phone number for students, alumni, constituents and organizations	Undergrad Admissions Grad Office Office of Student Financial Services Registrar's Office University Advancement	Payroll Student Employment Academic Affairs UHR Self Service SAIL
AT	APPLICANT TRACKING	Applicant phone number	Undergrad Admissions	Payroll Student Employment Academic Affairs UHR
BI	BILLING	If different than UH, 00, 01, HR	Student Accounts	NO LONGER IN USE
B2	Secondary BU-Univ Adv use only	Secondary business phone number	University Advancement	
BU	BUSINESS	Individual's work number or vendor's primary phone number	Registrar's Office University Advancement Accounts Payable	Purchasing Self Service SAIL
CL	CELLULAR	Individual's cellular phone number	Undergrad Admissions Grad Office Office of Student Financial Services Registrar's Office University Advancement	Payroll Student Employment Academic Affairs UHR Self Service SAIL
FA	FAX	Facsimile number	Undergrad Admissions Grad Office Office of Student Financial Services Registrar's Office University Advancement	Payroll Student Employment Academic Affairs UHR Purchasing Accounts Payable

Code	Description	Comment	Owner(s)	Update
FAX	Vendor PO Remittance Fax	Vendor PO/Remittance number	Purchasing	Purchasing
FO	FOREIGN	Non – United States phone number	Registrar's Office International Students and Scholars Office	
HR	HUMAN RESOURCES	Employee's phone number	Payroll Student Employment Academic Affairs UHR	Undergrad Admissions Grad Office Office of Student Financial Services Registrar's Office University Advancement Self Service SAIL
MA	MAILING	NOT USED (but system required)		
OA	CAMPUS ADDITIONAL	New	See Page 26	Self Service SAIL
OF	CAMPUS OFFICE	New	See Page 26	Self Service SAIL
OT	ACT Address	ACT Other UG Admissions	Undergrad Admissions	Payroll Student Employment Academic Affairs UHR
PA	PARENTS	Collected by UG Admissions and University Advancement	Undergrad Admissions University Advancement Office of Student Financial Services Registrar's Office	Undergrad Admissions University Advancement Office of Student Financial Services Registrar's Office Self Service SAIL
PG	PAGER	Individual's pager number	Undergrad Admissions Grad Office Office of Student Financial Services Registrar's Office University Advancement	Payroll Student Employment Academic Affairs UHR
PT	PAY TO	Accounts Payable check address	Accounts Payable	Accounts Payable
SE	SEASONAL	Phone number for second (seasonal) residence	University Advancement	University Advancement
UE	University Advancement ONLY/EMERG CONTACT	Reserved for University Advancement	University Advancement	University Advancement
UH	UNIVERSITY HOUSING	University housing address on campus. (Note: Phone numbers are no longer active for campus)	University Housing	University Housing

		residence halls and apartments, but may have been reused across campus.)		
--	--	--	--	--

INSERTING AND/OR INACTIVATING PHONE NUMBERS

INSERTING A NEW TELEPHONE NUMBER

To insert a new area code and telephone:

1. Direct access SPATELE or the Telephone tab on the appropriate %AIDEN form.
2. Insert a new record.
3. Choose the appropriate telephone type.
4. Enter the area code and telephone number.
5. Put a check mark in the box labeled "PRIMARY." There can ONLY be ONE "PRIMARY" number for each Type and Sequence number.)
6. Save.

INACTIVATING AN OLD TELEPHONE NUMBER

To inactivate an old, inactive phone number:

1. Direct access SPATELE or the Telephone tab on the appropriate %AIDEN form.
2. Find the record to be inactivated
3. Put a check mark in the box labeled "INACTIVATE."
4. Save.

ADDRESS STANDARDS

The following forms are used to enter and change address information. The form used depends on the Banner module in use.

<i>Form</i>	<i>Module</i>
SPAIDEN	Student
PPAIDEN	Human Resources
FTMVEND	Finance (vendors)
FOAIDEN	Finance
APAIDEN	Advancement/Alumni

- When the correct person/non-person is identified, select the address button to access the address screen.
- Addresses should be entered starting with address line 1 following postal regulations.

USPS Address Standards Publication 28 provides detailed explanations on the postal regulations for each part of an address. The Publication can be found at:

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

Excerpts from Publication 28:

Standardized Delivery Address

The Delivery Address Line and the Last Line of addresses output to the mail piece should be complete, standardized, and validated with the ZIP+4 file and City State file, respectively. It is recommended that delivery address information be stored in a minimum of 30 bytes or spaces in your computer system. The optimum recommendation is 64 bytes or spaces to be compatible with the Postal Service National ZIP+4 database.

The Postal Service defines a *complete address* as one that has all the address elements necessary to allow an exact match with the current Postal Service ZIP+4 and City State files to obtain the finest level of ZIP+4 and delivery point codes for the delivery address. A complete address may be required on mail at some automation rates. See the DMM for more detailed information.

A *standardized address* is one that is fully spelled out, abbreviated by using the Postal Service standard abbreviations (shown in this publication) or as shown in the current Postal Service ZIP+4 file.

Format

Format all lines of the address with a uniform left margin. Uppercase letters are preferred on all lines of the address block by the USPS. [Mixed case is the current Oakland University standard.](#) Per the USPS, lowercase letters in various type styles are acceptable provided they meet postal guidelines for OCR readability. Chapter 4 of Publication 25 provides complete guidelines for OCR readability that should be met when preparing a standardized mail piece. See the DMM for OCR readability requirements that must be met for automation rates (other rates may also apply).

Recipient Line Delivery Address Line Last Line:

ABC MOVERS
1500 E MAIN AVE STE 201
SPRINGFIELD VA 22162-1010

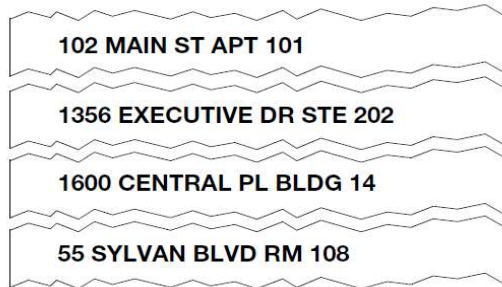
Recipient Line
Delivery Address Line
Last Line

MR JOHN DOE
123 MAGNOLIA ST
HEMPSTEAD NY 11550-1234

Address Block

Secondary Address Unit Designators

Secondary address unit designators, such as *APARTMENT* or *SUITE*, are preferred to be printed on the mail piece for address locations containing secondary unit designators. The preferred location is at the end of the Delivery Address Line. The pound sign (#) should not be used as a secondary unit designator if the correct designation, such as *APT* or *STE*, is known or is shown in the ZIP+4 file.



Common Designators

The most common unit designators are:

APARTMENT	APT
BUILDING	BLDG
FLOOR	FL
SUITE	STE
UNIT	UNIT
ROOM	RM
DEPARTMENT	DEPT

Pound Sign (#)

If the pound sign (#) is used, there must be a space between the pound sign and the secondary number.



Alternate Location

If all Delivery Address Line information cannot be continued in the Delivery Address Line above the city, state, and ZIP Code, place secondary address information on the line immediately above the Delivery Address Line.

MR M MURRAY
APT C
5800 SPRINGFIELD GARDENS CIR
SPRINGFIELD VA 22162-1058

Attention Line

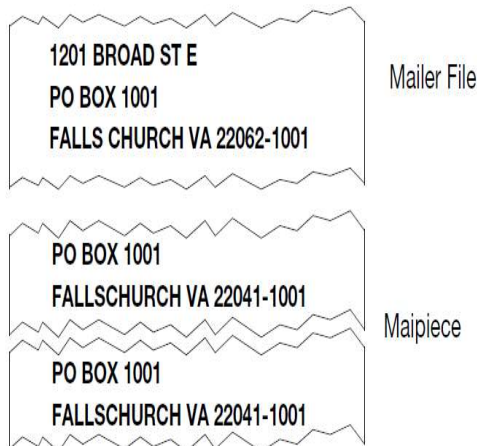
The Attention Line is placed above the Recipient Line, that is, above the name of the firm to which the mail piece is directed.

JOHN DOE
ABC COMPANY
1401 MAIN ST
FALLS CHURCH VA 22042-1441

ATTN JOHN DOE
ABC COMPANY
1401 MAIN ST
FALLS CHURCH VA 22042-1441

Dual Addresses

Eliminate dual addresses on the output mail piece, if possible, although mailer files may maintain both mailing and physical addresses. However, if dual addresses are used, place the intended delivery address on the line immediately above the city, state, and ZIP+4 Code. This normally is the Post Office Box address. The other address must be placed on a separate line above the Delivery Address Line. The ZIP+4 Code used must be the correct code for the delivery address on the line directly above the city, state, and ZIP Code.



City Names

It is strongly recommended that addresses use only approved Last Line (city) names as described in the Postal Service City State file currently in effect.

City names with the City State Mailing Name indicator flag set to YES in the City State file are considered part of a complete and standardized address; city names with the flag set to NO in the City State file should not be used in a complete and standardized address.

Punctuation

With the exception of the hyphen in the ZIP+4 Code, punctuation may be omitted in the delivery address block.

MR. WALTER W. WITHERSPOON JR.
MDM ENTERPRISES, INC.
1401 S. MAIN ST.
PLUMMER'S LANDING, KY 41081-1411

Acceptable

MR WALTER W WITHERSPOON JR
MDM ENTERPRISES INC
1401 S MAIN ST
PLUMMER'S LANDING KY 41081-1411

Preferred

Spelling of City Names

Spell city names in their entirety. When abbreviations must be used due to labeling constraints, use only the approved 13-character abbreviations provided in the City State file.

Note: Normally, the abbreviations follow the logic of using existing abbreviations, such as for suffix or directional words.

W STOCKBRIDGE

Acceptable

NEWBERRY SPGS

WEST STOCKBRIDGE

Preferred

NEWBERRY SPRINGS

Format

Format the Last Line with at least one space between the city name, two-character state abbreviation, and ZIP+4 Code.



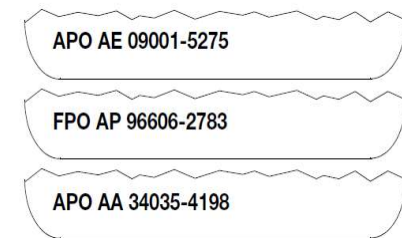
TAMPA FL 33630-9998

Note: Two spaces are preferred between the state abbreviation and ZIP+4 Code.

Military Addresses

Overseas Locations

Overseas military addresses must contain the APO or FPO designation along with a two-character “state” abbreviation of *AE*, *AP*, or *AA* and the ZIP Code or ZIP+4 Code.



APO AE 09001-5275

FPO AP 96606-2783


APO AA 34035-4198

AE is used for armed forces in Europe, the Middle East, Africa, and Canada;

AP is for the Pacific; and *AA* is the Americas excluding Canada.

Domestic Locations

Use only the approved city name as listed in the City State file, along with the two-character state abbreviation and the ZIP Code or ZIP+4 Code.



MINOT AFB ND 58705-1253

Street Name

Information found in the primary name field of the ZIP+4 file is used as the street name. The ZIP+4 file indicates the preferred primary street name to ensure that the correctly designated primary street record is matched during the address standardization processes.

Punctuation is normally limited to periods, slashes, and hyphens:

- Periods: 39.2 RD
- Slashes (fractional addresses): 101 1/2 MAIN ST
- Hyphens (hyphenated addresses): 289-01 MONTGOMERY AVE



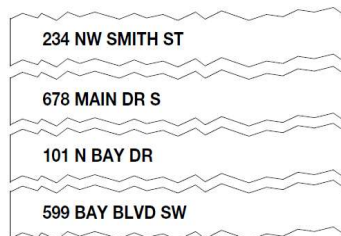
Note: Hyphens in the address range are significant and are not removed. Hyphens in the street or city name, however, normally are not significant and may be replaced with a space.

Directionals

This is a term the Postal Service uses to refer to the part of the address that gives directional information for delivery (i.e., N, S, E, W, NE, NW, SE, SW).

Abbreviations

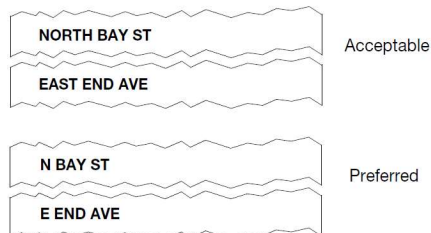
Abbreviate directionals (if they are one of the eight standard directional listed in AIS files) to the appropriate one- or two-character abbreviation.



Single Directionals

Predirectional Field

When parsing the address from right to left, if a directional word is found as the first word in the street name and there is no other directional to the left of it, abbreviate it and locate it in the predirectional field of the ZIP+4 file for standardization purposes.



Postdirectional Field

When parsing from right to left, if a directional word is located to the right of the street name and suffix, abbreviate it and locate it in the postdirectional field.



Two Directionals

When two directional words appear consecutively as one or two words, before the street name or following the street name or suffix, then the two words become either the pre- or the postdirectionals. Exceptions are any combinations of *NORTH-SOUTH* or *EAST-WEST* as consecutive words. In these cases the second directional becomes part of the primary name and is spelled out completely in the primary name field.



The other exception is when the local address information unit has determined that one of the directional letters is used as an alphabet indicator and not as a directional.

Directional as Part of Street Name

When parsing from right to left, if the directional word appears between the street name and the suffix, then it appears as part of the primary name spelled out in the ZIP+4 file and is spelled out on the mail piece.

COUNTY ROAD N EAST	Acceptable
COUNTY ROAD N E	Preferred
COUNTY RD NE	Unacceptable

Note: In this example, the two-word directional is the primary street name.

SOUTHEAST FREEWAY NORTH	Acceptable
SOUTHEAST FWY N	Preferred

Suffixes**Abbreviations**

The suffix of the address should conform with the standard suffix abbreviations listed in the ZIP+4 file (see [Appendix C of Publication 28](#)).

Two Suffixes

If an address has two consecutive words that appear on the suffix table ([Appendix C](#)), abbreviate the second of the two words according to the suffix table and place it in the suffix field. The first of the two words is part of the primary name. Spell it out on the mail piece in its entirety after the street name.

789 MAIN AVENUE DRIVE	Acceptable
4513 3RD STREET CIRCLE WEST	
1000 AVE E	
789 MAIN AVENUE DR	Preferred
4513 3RD STREET CIR W	
1000 AVENUE E	

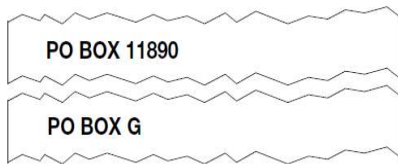
Numeric Street Names

Numeric street names, for example, *7TH ST* or *SEVENTH ST*, should be output on the mail piece exactly as they appear in the ZIP+4 file. Spell out numeric street names only when there are duplicate street names within a postal delivery area and the only distinguishing factor is that the one you matched is spelled out.

Post Office Box Addresses

Format

Post Office Box addresses are output as *PO BOX NN* on the mail piece.



Leading Zero

Post Office Box numbers that are preceded by significant leading zeroes are identified in the ZIP+4 file by a hyphen (-) preceding the box number. Convert the hyphen into a zero on the output mail piece.



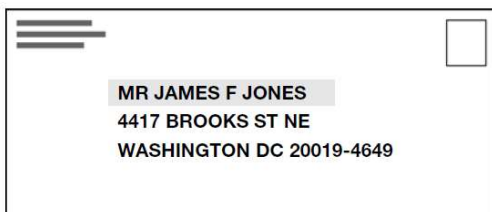
Designations

PO Box addresses often appear with the word *CALLER*, *FIRM CALLER*, *BIN*, *LOCKBOX*, or *DRAWER*. Change these to *PO BOX* as output on a mail piece.



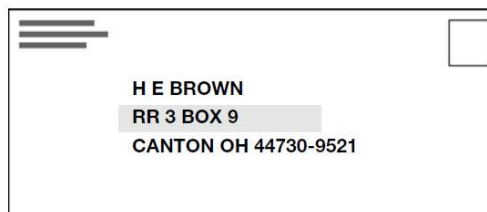
NON-ADDRESS DATA LINE → XXXXXXXXXXXXXXXX
 INFORMATION/ATTENTION LINE → MR STANLEY DOE
 RECIPIENT LINE → LAST NATIONAL BANK
 DELIVERY ADDRESS LINE → PO BOX 345
 LAST LINE → NEW YORK NY 10163-0345

KEY



MR JAMES F JONES
 4417 BROOKS ST NE
 WASHINGTON DC 20019-4649

INDIVIDUAL (SEE SECTION [212](#))



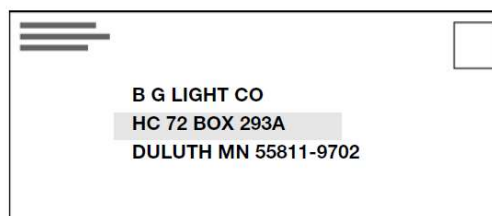
H E BROWN
 RR 3 BOX 9
 CANTON OH 44730-9521

RURAL ROUTE (SEE SECTION [24](#))



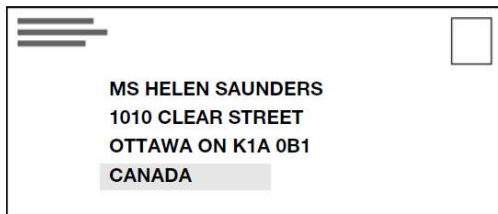
RUFUS LANGDON
 LAW DEPARTMENT
 US POSTAL SERVICE
 475 LENFANT PLZ SW RM 6627
 WASHINGTON DC 20260-1120

ATTENTION LINE (SEE SECTION [214](#))



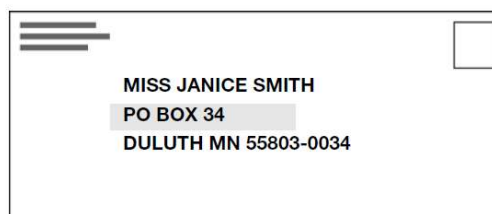
B G LIGHT CO
 HC 72 BOX 293A
 DULUTH MN 55811-9702

HIGHWAY CONTRACT (SEE SECTION [25](#))



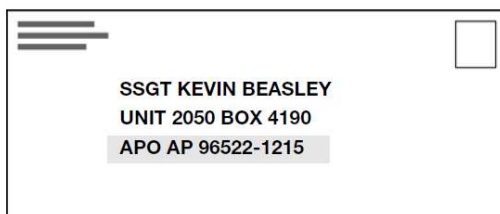
MS HELEN SAUNDERS
 1010 CLEAR STREET
 OTTAWA ON K1A 0B1
 CANADA

INTERNATIONAL (SEE SECTION [A3](#))



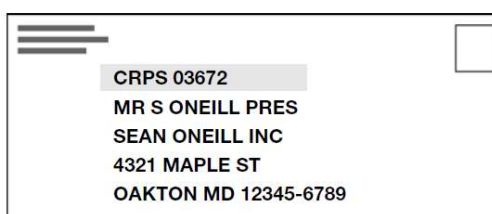
MISS JANICE SMITH
 PO BOX 34
 DULUTH MN 55803-0034

POST OFFICE BOX (SEE SECTION [28](#))



SSGT KEVIN BEASLEY
 UNIT 2050 BOX 4190
 APO AP 96522-1215

MILITARY (SEE SECTION [225](#))



CRPS 03672
 MR S ONEILL PRES
 SEAN ONEILL INC
 4321 MAPLE ST
 OAKTON MD 12345-6789

NON-ADDRESS DATA (SEE SECTION [343.3](#))

USPS states an address is not valid and the individual claims it is a good address.

Send the mail piece or a copy of the mail piece to the Manager of Mail Services. Once the mail piece or copy is received Mail Services will run the address through CASS and NCOA to see if these systems produce the same result. It is important that Mail Services sees the actual mail piece or a copy so they see what remarks the USPS placed on the mail piece. If the result is the same, the individual will be notified that they will need to contact their local USPS or carrier. There is nothing the university can do to resolve the issue since we do not submit Change of Address (COA) information.

Oakland University Address Standard

Name: Individual, Company Name, Attention line or Department (if applicable)
Address1: PO Box or Street Address Suite or Apt (if applicable)
City, St Zip: City, State Zip

If the street address does not fit on one line, use the second address line.

- Apartment or suite must go on the first address line
- PO Box or street address must go on the second address line:

Name: Individual, Company Name, Attention line or Department (if applicable)
Address1: Suite or Apt (if applicable)
Address2: PO Box or Street Address
City, St Zip: City, State Zip

These are the data-entry standards for all addresses. Clean Address will format the address to USPS Standards if address and apartment or suite can fit on one line.

Good Employee Address:

Name: Joe Smith
Address1: Accounts Payable Department
Address2: Vandenberg Hall Rm 121B
Address3: 502 Meadow Brook Rd
City, St Zip: Rochester, MI 48309-4452

Good Independent Contractor Address:

Name: Joe Smith
Address1: Crittenton Hospital
Address2: Ste 100
Address3: 123 Any Street
City, St Zip: Rochester, MI 48309

Good Company Address:

Name: General Motors Corporation
Address1: Attn: Roger Smith
Address2: Ste 100
Address3: 123 Any Street

City, St Zip: Rochester, MI 48309

Note: For PT addresses being used as the 1099 address default, only two street lines can be populated. Address must be modified to fit two street lines.

FOR TYPES OF AND OA:

Employee:

Street Line 1: Home Organization

Street Line 2: Full Building Name and Room Number

Street Line 3: Building Street Address

(Refer to the Office Addresses and Office Additional for Employees section for a more detailed explanation.)

FOR TYPES FO

To be updated by the International Students and Scholars Office only.

STREET ADDRESS

- Street address lines are 75 characters in length.
- Do NOT use periods or the pound (#) sign.
- Hyphens may be used when needed.

The most common unit designators and postal-standard abbreviations are:

Abbreviation	Unit	Abbreviation	Unit
Apt	Apartment	Ln	Lane
Ave	Avenue	PO Box	PO Box
Bldg	Building	Rd	Road
Blvd	Boulevard	Rm	Room
Cir	Circle	Rte	Route
Ct	Court	Sq	Square
Dept	Department	St	Street
Dr	Drive	Ste	Suite
Fl	Floor	Trl	Trail

- All street suffix designators should be entered using U.S. Postal Standard street suffix abbreviations.

You can visit the USPS Standards Publication 28 website for additional abbreviations not listed above:

http://pe.usps.gov/text/pub28/pub28apc_002.htm

Acceptable Geographic Directional abbreviations are as follows:

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

CITY

- Tab through the City field to the Zip Code field. If you enter the 5-digit Zip Code and then tab, the City field will populate.
- The Zip Code/City validation table in Banner is updated quarterly but it is necessary to verify the city with the individual to be sure the information is correct.
- Most cities will default into the field when the 5-digit Zip Code is entered and the TAB key is depressed. If entering city data, use uppercase and lowercase letters (refer to [U.S. Postal Standards](#) for appropriate abbreviations.)
- Maximum field length is 20 characters.
- Do NOT use periods in the city field.

STATE/PROV.

- Tab through the State/Prov field to the Zip Code field. If you enter the 5-digit Zip Code and then tab, the state field will populate.
- Use States or Canadian Provinces only.

COUNTY CODE

- This code will populate when the Zip Code is entered.

ZIP CODE

- Enter a 5 digit Zip Code (the table used may not have the full nine-digit Zip Code) and then tab to populate the City, State/Prov, County and Nation fields.
- Review the populated data and adjust city name if necessary, i.e. Auburn Hills to Lake Angelus (same Zip Code) or five-digit Zip Code to nine-digit Zip Code.
- Zip Codes must be entered for all U.S. addresses.
- For U.S. Zip Codes, enter a hyphen when the entire nine-digit Zip Code is available. If the last four digits are unavailable, enter the first five digits.
 - Example: 49225
49225-4987

NATION

- This code will populate when the Zip Code is entered
- US will automatically populate the Nation field when a Zip Code is entered for US addresses.

INTERNATIONAL ADDRESSES

Taken from the USPS Address Standards Publication 28.

A3

Postal Addressing Standards

A3 International Addresses

A31 General Requirements

The bottom line of the address should show only the COUNTRY name, written in full (no abbreviations) and preferably in capital letters. **Do not place the postal codes (ZIP Codes) of foreign country designations on the last line of the address. Do not underline the COUNTRY name.** An example of a correct foreign address follows:

INGE DIETRIC-FISCHER
HARTMANNSTRASSE 7
5300 BONN 1
GERMANY

- The city should be entered into the city field.
- The international Postal Code should be entered in the Zip Code field.
- The Nation Code should only be entered for international addresses in the Nation field. Nation Codes should NOT be entered in the city field or the state field. The nation code defaults to U.S. if the Zip Code is a United States Zip Code.
- These standards are for international MAILING addresses ONLY. They are not to be used for the Foreign (FO) address type. Refer any changes of FO address types to the International Students and Scholars Office (ISSO) at isso@oakland.edu or (248) 370-3358. The FO address type is not designed to be used as a mailing address.

Examples:

If an International Address appears as below:

Charles Smith
4 Hansen Rd S
Brampton Ontario L6W 3H6
CANADA

Henry LaFleur
French Impressions
13 Rue Duzes
75200 Paris
FRANCE

Enter it into Banner like the examples below:

Name: Charles Smith
Address Line 1: 4 Hansen Rd S
Address Line 2: blank
Address Line 3: blank
City: Brampton Ontario
State: blank
Zip: L6W 3H6
Nation: CANADA

Name: Henry LaFleur
Address Line 1: 13 Rue Duzes
Address Line 2: French Impressions
Address Line 3: blank
City: 75200 Paris
State: blank
Zip: blank
Nation: FRANCE

SEVIS rules require that the International Students Office report addresses for international students (00, 01, HR, FO). Also, international students are required to keep the International Students Office informed of any change of address. **YOU MAY CHANGE the (00), (01), AND (HR) address types for these students. DO NOT CHANGE the FO type.** All FO address type changes must be made by the ISSO office. If you make changes to the 00, 01 and/or HR address type, refer any student with an FO address type to the International Student and Scholars Office (ISSO) to be sure their current information is on file.

UNIVERSITY HOUSING (UH) ADDRESSES

- ➔ **DO NOT CHANGE A UNIVERSITY HOUSING (UH) ADDRESS (COTTAGES, RESIDENCE HALLS, OR APARTMENTS).** NEVER change these addresses, even if the student says they have already moved out. Students should contact University Housing if they are concerned about their housing address.
- Local addresses 00 may contain university housing addresses residence hall and apartment names (i.e. Hill House, George T. Matthews, Ann V. Nicholson Apartments or the Cottages). Students are able to add a university housing address using Self Service SAIL and there is no way to prevent this.
 - +4 Zip Codes are assigned to University Housing buildings.

University Housing & Plus 4 Zip Code Table

Hall Name	PLUS 4 CODE
Fitzgerald House	4482
Hamlin Hall	4452
Hill House	4452
Hillcrest Hall	4478
Oak View Hall	4452
Vandenberg Hall	4452
Van Wagoner Hall	4452

Apartment Name	PLUS 4 CODE
1000 Ann V. Nicholson	4425
2000 Ann V. Nicholson	4426
3000 Ann V. Nicholson	4427
4000 Ann V. Nicholson	4455
5000 Ann V. Nicholson	4428
6000 Ann V. Nicholson	4429
7000 Ann V. Nicholson	4430
George T. Matthews (on Meadow Brook Rd)	4452
George T. Matthews (on Ravine Dr)	4487
Cottages	1905

UPDATING STUDENT, ALUMNI OR CONSTITUENT ADDRESSES USING SPAIDEN, APAIDEN, FOAIDEN OR PPAIDEN

- Old addresses should be inactivated and end dated. Do not update the Source. The new address should be entered as an active address with the same address type as the old address.
- If the inactive box is checked, the address will not be selected for Banner reports.
- If the “To Date” field is populated with a future date, but the inactive box is not checked, the address will be selected for Banner reports.
- If the “To Date” field is populated with a date that has already passed, but the inactive box is not checked, the address will not be selected for Banner reports. **(Note that the inactive box should always be checked as part of inactivating an address).**
- The source of an address change should be provided in the “Source” field. Refer to the address source validation table (STVASRC) for available selections below.

Code	Description	Code	Description
ACT	ACT Scores	HTRN	High School Transcript
AP	AP Exam Scores	INV	Vendor Invoice
APP	Application for Admission	ISIS	Converted from ISIS
AUDT	Data Audit	ISS	International Student Services
BC04	BCI 2004 Lost Alum Search	KI07	Kintera 2007 Lost Alum Search
BC05	BCI 2005 Lost Alum Search	LOAN	Direct Loan Origination Record
CALL	Phone call from individual	MAIL	Mail, e-mail or fax
CASD	USPS Change of Address Service	ML02	Marts & Lundy 2002
CLVC	Cons Loan Verification Cert	MPT	Math Placement Test
COLL	Collection Agency	NCOA	National Change of Address Upd
CONT	Undergraduate Contact Card	ONGM	Online Gift / Membership
CORP	Corporate Sponsor	POST	Post Office change
CVT	Campus Visit	RE	Raiser’s Edge Conversion
DOE	NSLDS Database	RETD	Returned Mail
DRCT	Direct Contract	RSCH	University Advancement Research
EDI	Electronic Data Interchange	SAT	SAT Exam Scores
EXTR	Exeter Interface	SELF	In person report
GIFT	Gift to OU	TEL	Update Thru Telefund

GMAT	GMAT Tapeload	TOEF	Toefl Scores
GRAD	Application for Degree	TREQ	Transcript Request
GRE	GRE Dataload	TTRN	Transfer Transcript
GRHB	Graduate Hobson	UAS	Perkin's Billing Service
GRZL	GrizzLink Member Update	WAPP	Web Admissions Application
HCD	Harris Connect Data	WEB	World Wide Web
HRS	Converted from HRS		

HOLD 04 FOR MISSING ADDRESSES

*Only University Housing has the authority to change the University Housing (UH) addresses (cottages, residence halls, and apartments).

****NOTE:** When all Student addresses are inactive because mail sent to the address was returned by the post office and no new address is available, a **Hold 04 Address Missing** is placed on the student's record on SOAHOLD. This will prevent the student from obtaining transcripts, graduating or receiving grades until a valid address has been provided.

IMPORTANT: Remember when you are adding a Hold 04 Address Missing to an account, DO NOT check the 'Release Indicator' box. If the release indicator box is checked the only user who may remove the hold is the user that added the hold.

Any Banner user receiving a phone call from a student regarding an address problem should be aware of the hold procedure and should check SOAHOLD for the 04 hold. If the hold is there, the user should update the address and remove the hold. If the user does not have access to release the hold, the user should contact Academic Records at (248) 370-4055 and request that the hold be removed.

CAMPUS OFFICE (OF) ADDRESS AND OFFICE ADDITIONAL (OA) ADDRESS FOR EMPLOYEES

THE FOLLOWING STANDARDS APPLY TO BOTH OF AND OA ADDRESS TYPES:

- Addresses may be entered through any of the %AIDEN forms or through SAIL using the View/Update Address(es) and Phone(s) link in the Personal Information tab.
- Street addresses lines are 75 characters in length.
- Do NOT use periods or the (#) pound sign.
- Only use hyphens if needed for off campus addresses.
- History will not be maintained on OA or OF addresses. Therefore, you may clear each field and type in the new data or type over the existing data.
- If no OA or OF address exists, create new record.
- Always use **OF** for the employee's **primary** address and telephone number.
- **OA** addresses and telephone numbers are used for secondary offices such as a laboratory or main office address. The majority of campus employees will not have OA addressees or phone numbers.
- For additional information, visit the [Oakland University Web Directory](#) website.

Example of a Campus Office (OF) address:

Current Identification	Alternate Identification	Address	Telephone	Biographical	E-mail	Additional Identification	
ADDRESS INFORMATION							
From Date	07/01/2018					<input type="checkbox"/> Address Verified	
To Date						<input type="checkbox"/> Skip Address Verify	
Address Type	OF	Campus Office					
Sequence Number	4					Nation	
Street Line 1	Student Business Services					Telephone Type	
Street Line 2	North Foundation Hall Rm 120					OF	
Street Line 3	318 Meadow Brook Dr					Campus Office	
City	Rochester					Area Code	
State or Province	MI	Michigan					Phone Number
ZIP or Postal Code	48309-4454					Extension	
County						<input type="checkbox"/> Inactivate Address	
						Source	
						WEB	
						Delivery Point	
						Correction Digit	
						Carrier Route	

STREET ADDRESS

- Line 1 is designated as the Department Name (Home Organization). To verify the Department Name (Home Org), check the employees PEAEMPL record in Banner. The Department Name (Home Org) must be entered exactly as it appears in PEAEMPL. (See example of PEAEMPL below.)

The screenshot shows the Banner PEAEMPL record for a General Employee. The 'Home Department' section is visible, showing 'COA * U' and 'Organization * 7720 Student Business Services'. The 'Student Business Services' text is highlighted with a red box.

- Examples of Home Organizations are:
 - Academic Affairs
 - Information Technology
 - Advancement Services
 - Even if the person works at an extension site, use the Home Organization name in Line 1.
- Insert the Building name and room number for on campus employee on Line 2. Do not use punctuation.
 - For those employees housed at off campus locations (i.e., Macomb University Center, Birmingham Seaholm High School) enter the site name on Line 2:
 - Macomb University Center
 - Seaholm High School
- For on campus employees, **enter the building street address** in Line 3. Do not use punctuation.
 - For off campus employees, enter the full street name and room number on Line 3, in that order. Do not use punctuation.

CITY

- For on campus employees, enter "**Rochester**".
- For off campus employees, enter the city of the extension center.

STATE/PROV

- Enter “MI”

COUNTY CODE

- Do not enter a county code.

ZIP CODE

- Enter the + 4 ZIP code assigned to your building for campus employees. The + 4 ZIP codes can be found on the OUPD website at:
<https://oupolice.com/addresses/lookup/>
- For off campus employees, enter the Zip Code of the extension center

NATION

- Do not enter a nation code.

PHONE NUMBER

- Enter area code of 248 for all on campus numbers. For those employees housed at off campus sites (i.e., Macomb University Center, Seaholm High School) enter the actual area code.
- In the second field, enter the full seven digit phone number beginning with 370 for all main campus numbers. East campus (JDH, MBH, Golf, etc.) may have a different phone number prefix, i.e. 364. No hyphens are required. (example: 3704111)
Enter the actual phone number for off campus employees.
- The extension field is reserved for only those areas that have actual extensions (i.e., off campus locations). Enter the extension, but do not use an “X”, “ext” or other character to imply extension. Do not use this field for a secondary office number.

FROM DATE

- Date will default when record is saved.

SOURCE

- Enter applicable source code from list below or refer to the STVASRC – Address Source Code Validation table for other options.

Code	Description
AUDT	Data Audit
CALL	Phone call from employee
MAIL	Mail, fax or e-mail notification from employee
SELF	In person report from employee

SAVE RECORD

- Save record after data entry is complete.

E-MAIL ADDRESSES

- For University e-mail policy see [Policy 420, Employee Broadcast E-mail Procedure](#).
- Under no circumstances should the **OAKU** e-mail address be altered (changed or deleted). University Technology Services has locked down the OAKU e-mail address from being updated by most users.
- If the OAKU address in GOAEMAL is incorrect, a ticket should be submitted by e-mailing uts@oakland.edu.
- Two main e-mail types exist:
 - OAKU – The Oakland University e-mail address assigned by the Office of Information Technology.
 - OTHR – A non-Oakland University e-mail address. Multiple OTHR e-mail addresses may exist. Available for user to update via SAIL.
- Other e-mail types:
 - EBIL – Billing and collections e-mail (SBS only)
 - PT## – Accounts payable e-mail (Accounts Payable only)
 - PRNT – Parent e-mail. Available for user to update via SAIL.
 - PRN2 – Parent e-mail 2. Available for user to update via SAIL.
- In GOAEMAL, locate the person through the search option.
- Once the person is found, click on next block to move into the body of the form.
- If the **existing e-mail address is no longer active**, mark the old e-mail address “inactive” by putting a check-mark in the “inactive” box.
- **DO NOT DELETE AN “INACTIVE” E-MAIL ADDRESS. SIMPLY CHECK “INACTIVE”.** This will preserve the history and prevent e-mail search vendors from supplying OU with the same inactive or incorrect e-mail address.

- To add an OTHR e-mail type, place the cursor on a blank “E-mail Type” field. If no blank record exists, click on Insert on the toolbar. Multiple OTHR e-mail addresses can exist on the account.
 - Type OTHR in the E-mail Type field then tab.
 - Type the non-OU e-mail address in the E-mail Address field.
 - Save the record.

PREFERRED INDICATOR

- ***All OAKU e-mail addresses that are “active” must be the preferred e-mail address. If no OAKU e-mail address exists, another e-mail address can be the preferred address.***
- If an OAKU e-mail address does not exist, a person may identify another e-mail address as their preferred address by clicking the Preferred e-mail box.
- If a previous non-OAKU e-mail address is marked Preferred and you have not specifically been informed by the record holder that the new e-mail is Preferred, do not change the Preferred indicator.
- If an e-mail address is currently identified as the preferred address, but is incorrect, inactivate the e-mail and uncheck the Preferred indicator box.
- When updating Preferred indicators, you will need to un-check that address as preferred and save the record before you can mark the new address as preferred. Only one e-mail address can be marked as preferred.
- If there is only one e-mail address on the record, mark it preferred.
- If an additional e-mail address is being added to the record and there is not one marked as preferred, mark the newest e-mail as preferred.

Note: Changes to the Preferred indicator box for other (OTHR) e-mail addresses may be made. No more than one (1) e-mail address may be identified as Preferred.

ADDRESS DATA AND REPORT WRITING

When individuals are querying address data from Banner in Access they need to be sure they are looking at both the "To Date" field and the "Inactive Address" box of the address to be sure they are not pulling inactive addresses. There is a script (job SZRSRDR) that is run nightly that looks at these two fields and updates them accordingly. If the "To Date" field is populated with a date that is less than today's date and the "Inactive Address" box is not checked, the script will put a check in the "Inactive Address" box. Alternately, if the "Inactive Address" box is checked and the "To Date" field is blank, the script will put yesterday's date in the "To Data" field.

When individuals are querying address data from Banner in Access they need to be sure they are paying attention to the 'Deceased' indicator on the record (in SPBPERS table or various views). The 'Deceased' indicator must be 'null' (blank) so that mailings are not sent to an individual who is deceased.

When individuals are querying address data from Banner in Access they need to be sure they are paying attention to the 'Confidentiality' indicator on the record. The 'Confidentiality' indicator must be 'null' (blank) so that mailings are not sent to an individual who has marked their record as 'confidential', unless the mailing is directly related to the person's academic program.

Individuals are encouraged to use the BAN_STUDENT_LABELS_LISTS View to query address data.

The Shared Data Address Sub-committee created two databases to assist departments in finding updated addresses. One database reports address updates by students and the other database reports updates by employees. The databases are located on the Shared Data Committee shared drive at:

<\\shares\SharedDataCommittee\Shared Data Committee Address Change Audit Databases>.

CLEAN ADDRESS SOFTWARE

Clean Address Process in Banner:

The Clean Address software in Banner verifies the validity of an address and helps ensure that addresses meet current USPS Standards. Clean Address:

- Checks the validity of a given address in relation to the ZIP Code.
- Checks the validity of an address by comparing the street number to known ranges for a given street within a ZIP Code.
- Standardizes the addresses entered by abbreviating street names in accordance with USPS Standards.
- Formats the entire address in accordance with postal standards, such as placing the apartment or suite on the same line as the street address or on the line above the street address.
- Does not verify that a recipient still lives at the address. This is done with CAS certification.

Clean Address monitors addresses entered into Banner through INB and through self-service SAIL:

- Address types reviewed: 00 Local, 01 Primary, BU Business, HR Human Resources, MA Mailing, OA Office Alternate, OF Office Address, PO Purchase Order, PT Pay To Address, SE Seasonal
- For formatting, punctuation and abbreviations, Clean Address will update the entered address without notifying the user. Items that are standardized include: Street Address, Zip Code, and County. When these changes occur, the users should accept them as the changes conform with Postal Standards.

- For street number or street name, Clean Address will present the user with a pop-up message notifying the user that corrections are necessary. Examples of corrections are: an address does not fall within a valid range, does not have a valid street name or there are multiple matches. Users are given the opportunity to correct the address. In self-service SAIL, the user must enter a valid address, but in INB, users can override the pop-up, if the address is known to be correct. It is recommended that the user contact the individual for clarification.

Clean Address can also be run in batch mode to validate addresses that are loaded into Banner from external sources such as ACT test scores or CAS certification files. The batch process is run quarterly after the Clean Address database is updated with current USPS address tables. The batch process can be set to review all records or only review unverified records in the address table. Oakland's practice is to only review unverified records during the batch process.

When Clean Address corrects an address, indicators are placed in the SPAIDEN routing and delivery fields on the address form.

Delivery Point	<input type="text" value="06"/>
Correction Digit	<input type="text" value="7"/>
Carrier Route	<input type="text" value="C091"/>

There is also an entry to the "Reviewed User" field in the SPRADDR table, which can be queried using Access, SQL or using the form GOAADDR.

SATURN_SPRADDR.SPRADDR_REVIEWED_USER
20071002:
20071002:CC
20071002:M3

If the entry in the "Reviewed User" field has a code after the date, the address was not updated by Clean Address for the following reasons:

CLEAN_Address will return this field as output, when an address is NOT fully verified: contains a single letter, that represents the problem encountered:

M Multiple Matches
N No Data Available For City
R Range Error
T Component Error
U Unknown Street
X Undeliverable Address
Z Invalid ZIP Code
C Canadian ZIP Code
D Demo Mode Only Empty: No Error

Output field: contains a 2-character code for Delivery Point Validation Status.

AA Passed DPV:

BB Passed DPV

RR Passed DPV

A1 Not matches to ZIP+4

CC Suite/Apt Invalid

M1 Street Number Missing

M3 Street Number Invalid

N1 Suite/Apt Missing

P1 Missing PO, RR, or HC Box number

P3 Postal or Rural Route Primary number
invalid

R1 Suite/Apt Missing