NAMES

Lookup
The first step before data entry is to verify that the individual does not already have a record in the Datatel system. The most accurate method of searching for a name is the Social Security Number (SSN). If the SSN is not available or if the SSN search is unsuccessful, search by the name. Enter the first three letters of the last name, followed by a comma, followed by a space, followed by the first letter of the first name.

Example: “Gar, M” to search for Matthew Garza

Try several different search combinations (minimum 3) before assuming the individual you are searching for is not in the system. Beware of nicknames and misspellings, as well as variant spellings.

Example: Tom – Thomas Shaffer – Schaeffer

Names with spaces require a special lookup procedure:

- Substitute an underline “_” for the spaces when you do the lookup.

Example: Van Helsing
  - First type “Van_H”
  - Then type it without the space, “VanH”
  - When entering these type of names, enter it exactly as given by the individual

Example: “Van Helsing” should retain the space and “VanHelsing” would not.

Name Entry
When entering a new person into the system, please be sure to enter the proper first name, not a nickname. Enter the full middle name if known. If entering just an initial, do not use a period after the initial. Enter the prefix and suffix if applicable. You may also enter a Nickname.

Example: First: Matthew Middle: P Last: Garza

Maiden or Other Names
Enter the Maiden name in the Birth Name field and any other names in Other Names on the BIO screen. The entire name, including the First Name must be included for the look up on those names to work. For hyphenated and two-part names (e.g. Jones-Smith or Jones Smith) should have both last names entered as other names.

Example: Susan Jones-Smith
  - Enter Susan Jones-Smith in as the First and Last name.
  - Enter Susan Jones in Other Names
  - Also enter Susan Smith in Other Names

First Initial and Full Middle Name
If you only have a first name initial and a full middle name, enter the first name initial in the first name field and the full middle name in the middle name field. Do not combine them into the first name field. Also, make sure to type the middle name in the Nickname field. Otherwise, letters sent to the individual will have a salutation of only their first initial.
DATA ENTRY STANDARDS
As Set by the Core Team
March 12, 2009

Example:

**CORRECT ENTRY**

<table>
<thead>
<tr>
<th>Last Name</th>
<th>Smith</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>J</td>
</tr>
<tr>
<td>Middle Name</td>
<td>Michael</td>
</tr>
<tr>
<td>Nickname</td>
<td>Michael (or Mike if you know he goes by Mike)</td>
</tr>
</tbody>
</table>

**INCORRECT ENTRY**

<table>
<thead>
<tr>
<th>Last Name</th>
<th>Smith</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>J. Michael</td>
</tr>
<tr>
<td>Middle Name</td>
<td>&quot;blank&quot;</td>
</tr>
</tbody>
</table>

Salutation when Nickname field is filled out: Dear Michael
Salutation when Nickname field NOT filled out: Dear J

Example:

**CORRECT ENTRY**

<table>
<thead>
<tr>
<th>Last Name</th>
<th>Jones</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Matthew</td>
</tr>
<tr>
<td>Nickname</td>
<td>Matt</td>
</tr>
</tbody>
</table>

**INCORRECT ENTRY**

<table>
<thead>
<tr>
<th>Last Name</th>
<th>Jones</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Matthew</td>
</tr>
<tr>
<td>Nickname</td>
<td>Matt Jones</td>
</tr>
</tbody>
</table>

ADDRESSES

**Overall Guidelines**

- Enter the complete address.
- Enter the zip code in the city field to ensure all fields become populated. Double-check the city selected by the zip code entry. If different, type over the incorrect city to make the correction.
- Street addresses always appear on the first line of the address.
- Do not enter any commas.
- Please limit the use of abbreviations as much as possible.
- **Never use “#” in an address.** If number must be used type “No.”.
- When entering numbered streets, always use the number.
  
  **Example:** 2nd not Second.
- **Always abbreviate directional words.** Directional abbreviations at the end of the street should not have periods (frequently used in the southern states).
  
  **Example:** 207 N. 2nd Avenue
  1547 Constitution Drive NW
- **NOTE:** Address labels typically have a maximum size of 5 lines.
- **NOTE:** Preferred and Mailing names are restricted to 30 characters for processing in Communications Management (PCB, DMP, PCEX). These will error out when processed and will need to be shortened.

**Second Address Line**

Second Lines in addresses are used as follows:

- Enter the P.O. Box on the second line.
- Enter Apartment number on the second line.

Address Type Guide:

**Business:** address associated with an organization or business

**Check:** address where checks should be sent

**Home:** full-time residence address

**Local:** off-campus, not full-time residence address

**Work:** work address for individual – not associated with a business

Please see a member of the Core Team with any questions.
DATA ENTRY STANDARDS
As Set by the Core Team
March 12, 2009

• Do not abbreviate Apartment. Use “-” to separate letters and numbers.
  
  Example: Apartment B-17.

• Floors and units. The words “Floor” or “Unit” get spelled out. Both are entered on the second line.
  
  Example:
  123 W. 24th Street
  2nd Floor

  Example:
  123 W. 24th Street
  Unit 3

• The street address and P.O. Box/Apartment lines should be kept to a maximum of 2 lines.

Rural Addresses and Post Office Boxes
Rural addresses should be entered like this:
  
  RR 1 Box 34-B  No periods in RR; space after RR
  RD 4 Box 23  Same rule

Do not confuse Post Office Boxes with rural route box numbers. Use periods to abbreviate “P.O.” Box.
  
  Example:
  1299 Forest Road
  P.O. Box 12

Foreign Addresses
Enter the entire address in the address line fields, leaving the City, State and ZIP fields blank.

Enter the Country code in the Country field. You can look up the Country code by typing … in this field. If you need assistance with Country codes, please contact Kate Ferris or Lori Boesch.

Country should be entered in UPPERCASE

PHONE NUMBERS
A Phone Type must be associated with the phone number. Phone type controls where the phone number is stored. Personal phones are associated only with the person. Address phones are associated with the address and any residents of that address.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Personal or Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUS</td>
<td>Business</td>
<td>Address</td>
</tr>
<tr>
<td>CEL</td>
<td>Cell Phone</td>
<td>Personal</td>
</tr>
<tr>
<td>FAX</td>
<td>Fax Number</td>
<td>Address</td>
</tr>
<tr>
<td>HOME</td>
<td>Home Phone</td>
<td>Address</td>
</tr>
<tr>
<td>LOC</td>
<td>Local</td>
<td>Personal</td>
</tr>
<tr>
<td>UNK</td>
<td>Unknown</td>
<td>Personal</td>
</tr>
<tr>
<td>WORK</td>
<td>Work</td>
<td>Personal</td>
</tr>
</tbody>
</table>

**NAE:**
Phone type is entered next to the phone number.

**ADR:**
Phone type is also entered next to the phone number.

If you do not know the phone type, please choose UNK – Unknown.

Please see a member of the Core Team with any questions.
DATA ENTRY STANDARDS
As Set by the Core Team
March 12, 2009

EMAIL ADDRESSES
- Enter the email address as soon as it is known.
- DSU email addresses are entered by the IT department.
- See Email Address Type Guide in sidebar.

INFORMATION NEEDED BEFORE ADDING A NEW RECORD
All information that we have should be entered.

The following fields are necessary:
- Full (Legal) Name
- Gender
- Address
- Social Security Number *
- Birth Date *

* The individual may refuse to give this information. However, it is important to inform them that we use this information to identify people remotely, particularly in automated password reset processes.

Ask for any previous DeSales affiliation. If there is a previous DeSales affiliation, then person will be in the Datatel system.

MAJORS
Every active student must have an active academic program. Make sure the student type matches the academic program. Make sure the date is valid for the term registered.

IMPORTANT NOTES
NEVER use spaces to delete characters at the end of a line. Use the delete key after the last character to “erase” the extra characters.

Make sure upper/lower casing is correct. Use “=” to precede the entry, if necessary.

Example:
- Enter “DeSales University” Incorrect Result – “Desales University”
- Enter “=DeSales University” Correct Result – “DeSales University”

Address Examples:
- 645 N. 34th Street
- 189 Hughes Avenue
- RR 1 Box 761-a
- No. 2
- 10 Evelyn Lane
- P.O. Box 154
- 6707 Bonnie Ridge Drive
- Unit T-1
- 100 Mary Street
- Suite 2
- 4615 Villa Chase Drive NE
- 210 Ash Street
- 1330 Washington Street
- Apartment B
- Apartment C-23

Please see a member of the Core Team with any questions.
Abbreviation Examples for use only when necessary
(Street Suffix – Proper Abbreviation):

<table>
<thead>
<tr>
<th>Street Suffix</th>
<th>Proper Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avenue</td>
<td>Ave.</td>
</tr>
<tr>
<td>Boulevard</td>
<td>Blvd.</td>
</tr>
<tr>
<td>Circle</td>
<td>Cir.</td>
</tr>
<tr>
<td>Court</td>
<td>Ct.</td>
</tr>
<tr>
<td>Drive</td>
<td>Dr.</td>
</tr>
<tr>
<td>Estate</td>
<td>Est.</td>
</tr>
<tr>
<td>Highway</td>
<td>Hwy.</td>
</tr>
<tr>
<td>Lane</td>
<td>Ln.</td>
</tr>
<tr>
<td>Parkway</td>
<td>Pkwy.</td>
</tr>
<tr>
<td>Place</td>
<td>Pl.</td>
</tr>
<tr>
<td>Road</td>
<td>Rd.</td>
</tr>
<tr>
<td>Route</td>
<td>Rte.</td>
</tr>
<tr>
<td>Street</td>
<td>St.</td>
</tr>
<tr>
<td>Trail</td>
<td>Trl.</td>
</tr>
<tr>
<td>Village</td>
<td>Vlg.</td>
</tr>
</tbody>
</table>

Address Change Source Codes:
- R – Returned Mail
- N – New Address Form
- COR – Correction
- C – Check
- EM – Email
- RES – Research
- Place – Pl.
- Highway – Hwy.
- Lane – Ln.
- Parkway – Pkwy.
- Trail – Trl.