

Data Standards Committee Meeting

Tuesday, October 3, 2006

2:00 pm in the Founders Seminar Room

Present: Steve Howell, Pam Stimpert, Ryan Reinheart, Mindy Lawrentz, Gayle Lantz, Sherry Bowling, Rose Martin, John Brandon, Cara Selan, Lori Lower, Wendy Schag, Karen Little, Vicki Yoho, Don Prezioso, Dreama Knight

Sharon Bowling requested that minutes be sent out sooner for review. Minutes and Agenda will be posted to the IT website.

Entry of Names in System Don stated that at the last meeting the group talked about data that would not be entered.

- No periods (dots)
- Only (- ')
- Use of suffix field (Jr. not part of last name)

Searching of Names in System Don asked each department how they are currently doing a name search. Don would like documentation on search policies drafted.

- Admissions-Mindy Lawrentz stated that 1st they do a SS# search. The first 3 letters of the last name is used when there is no SS#. A maiden name (if available) is another option.
- Personnel- John stated that his dept. always does a search to see if the person is in the system
- Registrar- Karen Little stated that her dept. needs the maiden name left in for reports they run. Don added that when you are doing a name change you get the option of birth or other there can only be one birth name.
- Don mentioned the soundex search as another option.

Actual Entry of Names Don requested a list from each department on ways they are currently entering names.

- Most depts. are not using prefixes, except Rose Martin, Grad Ed in Cleveland and Personnel do prefixes. Grad Business does not. This can create problems when doing labels. Karen Little stated that certain fields can be selected when doing labels.
- Middle names are entered and parents are added in Admissions when a student is accepted. There are some policy issues when a parent gets entered and how the information gets processed on the parent loan application. Step parents are included.
- Siblings (generally added from web application)
- Institutions (remote sites enter under grads by hand, Loraine does their own applications per Brian)
- High Schools (not always added)
- Student workers (sometimes)
- Sharon Bowling stated that nicknames are very common, but should not be used in mailing. Don suggests adding nicknames to the virtual field if they are to be used in mail-merges.

Problems with names

- Maiden to married name changes. Maiden names show up in names searches in parentheses.
- Changes in the NAE screen automatically change most of the time but doesn't always so it's necessary to check the whole screen for updates. Don suggested going to the BIO screen and making changes since there are more name options there.
- Names not being changed.
- Remote sites changing names. How could this be stopped? Karen Little suggest that the office that have permanent records make the changes. With grad students changes are usually made where they live.
- John Brandon stated that there is no real process in changing names and it would be a good idea to get something in writing.
- How do we know when we're dealing with the right person?
- Legal documentation especially in remote areas and how that that information is sent to Personnel.

Guidelines for Name Changes

- Must know if we're dealing with current students or alumni's.
- Should employee/student go to Personnel or Registrar? Sharon stated that changes would still be made in Registrar.
- Out reach offices. Currently Sandy Evans sends all changes needed to the Registrar's office.
- Professional Development currently makes name changes and must have prefixes for all parents.
- Financial Aid does not make name changes except with Parent Loans. Parents are added but student's names are not changed. Sharon stated that sometimes the Registrar's office will make parent information changes.
- Corporations and vendors. Personnel will sometimes need to make name changes with forms adding corporations and vendors. Accounts payable also add corporations and vendors. MBA has Registrar's office put in Corporations.
- Hospital information currently updated by the Nursing dept.
- Donors and anyone that could be a donor and some funding from other colleges are added by the Development Office.
- Colleges and high schools (if they've applied) are entered by Admissions. Karen Little added that occasionally we pay other colleges.
- Transfer students add/changes currently made through Registrar's office.
- Bank names are added by Financial Aid sometimes there are 10-15 entries if address is different. Financial Aid records are not being changed if information doesn't match. They will add new records.

Colleague Advancement

- Wendy suggested that everyone look at the Datatel web demo site (datatel.raindance.com). She is totally impressed with it.
- The RELE screen is getting changed due to the SS#. It was blacked out for security. Group will decide who should see the number when Colleague Advancement is available.
- There are several recorded demos available and can be viewed at www.datatel.com.

Next meeting, November 6th will be held in the Library Lecture room.
Wendy Schag agreed to produce a draft for searching names according to the standards they are currently using as a model to determine policies/procedures for the Data Standards Committee to agree upon.