Policy for Data Entry of
Names and Addresses

<u>**Name Information:**</u>

- **Last Name**: Begin with capital letter.
    - All other letters are lowercase except when a capital is required.
    - Names with an apostrophe or hyphen do not have a space (Eg., O'Brien, Smith-Jones). Mc, Mac, and La have no space (Eg., McManus, LaLiberte, VanDyke).
    - The ONLY time you would have a space would be if the person request that one be added to their name.

- **First Name**: Begin with capital letter
    - First official, formal name (i.e, not a nickname).
    - If middle name is preferred as first name, enter first name initial (with period), space and the middle (preferred) name. (Eg, R. Joseph, L. Charles.)

- **Middle Name**: Use capital initial (with period).
    - If there is more than one middle initial, put both without a space (Eg., Roger F.X. Carney).

- **Company Name:** Legal name of company as it appears on company stationary, business card or invoice. If the company name has the word "The" in the name, it must be entered at the beginning of the name. (Eg., The New York Times)

    - Acceptable abbreviations for use in a company name:
      Co.
      Inc.
      Ltd.
      PC
      LLC
      Corp.
      No commas are to be entered prior to the corporation status.

- **Birth Name**: Maiden name only.
    - Enter first, last and middle name.

- **Other Name:** Any legal name change would be entered in the Other LFM, using the previously described rules.
    - The person requesting the name change MUST provide legal documentation before the change can be made.

- **Nickname**: Use only if available. (Eg., Bucky, Moose)

- **Prefix**: Do not enter prefix.

- **Suffix**: Choose from the dropdown data window.

- **Mail Name:** Is automatically created by the software based upon what is entered in the prefix, first name, middle name, last name and suffix fields.

- **Preferred Name:** Is automatically created by the software based upon what is entered in the prefix, first name, middle name, last name and suffix fields. If a preferred name is specified enter it in this field.

Address Information

- **Street (Line 1)** Do not use any commas in address fields.
  - Use numerals and full name of street.
  - Abbreviate St., Rd., Blvd., and Apt., Bldg., Ste., etc.
  - Put one space between the street and apartment number, not a comma or two spaces, and no space between # and the number.
  - All letters should be uppercase (Eg., Apt.4C).
  - Abbreviate all directional information such as N, S, E, W, NW (no periods), followed by one space if it comes after the street name.
  - If the direction is prior to the street name, spell the word out. (Exceptions to directional abbreviations are places such as North Ave). Put PO Box here if there is no street address. Do not use #, change POB to PO Box (no periods). For rural routes, use RR (Eg., RR 2 Box 152). Change RFD and RD to RR

- **Street (line 2)**: Use for any secondary information such as floor or apartment, *only* if this information does not fit on line 1.
  - Use for PO Box if there is a street address in line 1.

- **Street (line 3)**: Use for PO Box only, and only if Line 2 is filled.

- **City**: Enter the Zip Code in this field and the City, State and Zip will be automatically populated.
  - Spell out city name including North, South, East, West. If needed for space, abbreviate N, S, E, W (no periods) followed by one space if it precedes the city name. Use this field for Canadian cities also.
- **State**: Use also for Canadian provinces.

- **Zip**: Delete dash if zip is not +4.

Note for mailing: *Military addresses should contain either APO or FPO followed by an AE, AP, or AA and zip code (overseas)* **OR** *the city name, AFB, state name and zip (domestic). If these components are not there, this is an incomplete address.*

Note for mailing*: International addresses must contain the country's name (not abbreviated) on the last line of the address.*

- **Country**: Only enter foreign countries. A blank will signify that the country is the US.

Additional Information

- **Email**: Enter one clean email address; delete extraneous information, such as "home," "work," and websites (WWW).   When entering email addresses, look over them carefully -- any error will result in a returned email.

- **Phone/Number/Extension**: Put in area code and number. Extension should go in the adjacent box. The type of phone is in the last block on the line (ie. Home, fax, cell etc.)