[SCHOOL] Rules and Standards
for
Data Ownership and Entry

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1. Overview

This guide is designed to provide a set of rules and standards for the processing of data within the school. The correct entry and flow of information within the various offices (domains) within the school requires that data entered into any system be done so carefully and accurately while following a common set for rules and standards. Compliance will ensure that information entered in one system/domain will transfer to another, correctly and less time can be spend on data entry, validation and management.

If you have any questions or concerns with the information contained herein please contact with the Director of Technology or the Coordinator of Information Systems.

2. Data Domains

Institutional data domains need to be defined in order to better understand and define the ownership, flow and input of data into the system. The Data Domains, Entry, Ownership and Support chart represents the current structure of the various domains within the school identifying the sub-domains, data entry personnel, owners and support.

> **See Appendix**: Data Domains, Entry, Ownership and Support

Once domains are define you can begin to look at the flow of data within an institution. The current flow of data flow between the Admissions, Academic and Development domains is outlined in Data Flow Chart - Admissions, Advancement & Activities.

> **See Appendix:** Data Flow Chart - Admissions, Advancement & Activities

Individual domain specific actions and events are not covered by this document (enrollment process data, grade entry, transactional data, etc.) unless the data points are covered by the Rules for Data Entry.

3. Data Ownership

This chart is to define the areas of data ownership by domain for specific constituent groups. Each domain would have school-wide ownership and authority over data owned.

This chart does not include examples of ownership for domain specific data such as prospect status (Admissions), attendance (Academics), gift entry (Development), payroll (Business Office / Human Resource), AUX registrations (Auxiliary) and CCO (matriculation data)

DOMAIN	DATA OWNED
Admissions	All prospect, current family and student biographical, demographic and enrollment data. Examples: siblings, legacy data, grandparents, ISEE data
Academics	All current and former students academic data. Examples: ALL grades/comments, standardized testing data (Gates, CTP, PSAT, AP, SAT, SAT II, ACT, etc.)

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DOMAIN	DATA OWNED
Development	All alumni, trustee, past parents employees (current & former), former students (Did Not Graduate) biographical and demographic data.
Business Office / Human Resource	All current and former employee biographical and demographic data
Auxiliary	All non-school related (prospective or enrolled) family and student biographical and demographic data.
College Counseling Office	All data relating to the college process and placement
Medical	All student and employee medical data
Activities: Athletics	All student athletic data
Activities: Co-Curricular	All student co-curricular data including all clubs, activities and performances (Spring Musical, etc.)

Domains excluded: Ad hoc and Communications

4. School Wide Events

The following charts represent the present (2012) and various data needs when a "school-wide" event occurs.

A school wide event is an event that effects multiple data domains within the school and requires the sharing of relevant information without which breakdowns will occur.

This does not include domain specific events such as: Admissions - new inquiry, Academics - Printing of grade reports, Development - gift entry, Business Office - issuing of bills, Communication - weekly mailings and Tech Related - posting to Moodle.

Additions, withdrawals/departures & changes will are detailed below. These are the broad-strokes as there are greater specifics in each area.

Methods of communicating current changes are not detailed herein, however the method of data entry is identified where possible.

* NOTE: There is no real human resource department within the school. These duties are currently split between the Business Office and Headmaster's Office.

ADDITIONS
New Student - New Family

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Domain	Responsibilities
Admissions	Enter all relevant family information including (manual): • Student/Parent(s) information • Legacy or other connection Issue enrollment contract Parent Directory
Academics	Enter all relevant student & family information (import) Schedule in courses & issue schedule
Medical	TBD
Development	Enter all relevant family information including (import & manual entry): • Parent(s) information • Legacy or other connection
Business Office / Human Resources*	Issue Business Office ID
Communications	Enter into HoneyWell Instant Alert System Add to FinalSite Portal(s)
Tech Related	Add to network systems (Open Directory, AAA, JSS, etc) Issue laptop, case & backup drive Add to online resources

New Student - Existing Family

Domain	Responsibilities
Admissions	Enter all relevant family information including (manual entry): • Student/Parent(s) information • Legacy or other connection Issue enrollment contract Update Parent Directory
Academics	Enter all relevant student information & connect to family(ies) (import) Enroll in courses & issue schedule
Medical	TDB
Development	Enter all relevant student information including (import & manual entry): Link to parents, sibling(s) & other relatives
Business Office / Human Resources*	Issue Business Office ID
Communications	Enter into Honeywell Instant Alert System Add to FinalSite Portal(s)
Tech Related	Add to network system (Open Directory, AAA, etc.) Issue laptop, case & backup drive Add to online resources

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New Employee

Domain	Responsibilities
Academics	Enter all relevant faculty information (manual) Schedule in courses & issue schedule
Medical	TBD

Development	Enter all relevant employee information including (manual):
	    • Spouse data (if applicable)
	    • Legacy or other connection

Business Office / Human Resources*	Issue contract Add to faculty directory (print) Benefit Information

Communications	Enter into HoneyWell Instant Alert System
	Add to FinalSite:
	    • Portal(s)
	    • Directory Information

Tech Related	Add to network system (Open Directory) Create email account Issue phone number & voicemail Issue laptop, case & backup drive Add to online resources, where relevant

WITHDRAWALS / DEPARTURES
Withdrawn Student - Family Leaves

Domain	Responsibilities
Admissions	Update appropriate record(s) according to office guidelines
Medical	TBD
Academics	Update appropriate record(s) according to office guidelines
Development	Update appropriate record(s) according to office guidelines
Business Office	TBD
Communications	Remove from HoneyWell Instant Alert System Remove from FinalSite Portal(s)
Tech Related	Remove from network systems (Open Directory, AAA, JSS, etc) Retrieve laptop, case & backup drive Remove from online resources

Withdrawn Student - Family Stays (other students)

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Domain	Responsibilities
Admissions	Update appropriate record(s) according to office guidelines
Academics	Update appropriate record(s) according to office guidelines
Medical	TBD
Development	Update appropriate record(s) according to office guidelines
Business Office / Human Resources*	TBD
Communications	Remove from HoneyWell Instant Alert System Remove from FinalSite Portal(s)
Tech Related	Remove from network systems (Open Directory, AAA, JSS, etc) Retrieve laptop, case & backup drive Remove from online resources

Departing Employee

Domain	Responsibilities
Academics	Mark as inactive all relevant faculty information (manual)
Medical	TBD
Development	Adjust ConCodes: FF or FE
Business Office / Human Resources*	TBD

Communications	Remove from HoneyWell Instant Alert System
	Remove from FinalSite:
	    • Portal(s)
	    • Directory Information

Tech Related	Remove from network systems (Open Directory, AAA, JSS, etc) Retrieve laptop, case & backup drive Delete email account Reclaim phone number & delete voicemail Remove from online resources

CHANGES
What changes are communicated and how they are communicated is still to be determined. The most relevant change is that of demographic and/or biographical data, however as we track more activities data (athletics, co-curricular, volunteer) this will be a greater area of focus.

5. Rules for Data Entry

[**PLEASE NOTE**: *The basic outline for these rules were pulled from the published Yale University Standards found here:* http://www.yale.edu/ppdev/Guides/hr/StandardsDataEntry.pdf]

General Rules

1. Constituent will refer to an individual across any of the data domains

2. Use mixed case (upper and lower case).

   a. Do not enter anything as all capital letters except for standard abbreviations or programs known by their acronyms.

3. Do not enter punctuation marks (except for periods, apostrophes and hyphens within a name or phone number).

4. All rules adhere to the published [SCHOOL] Communications Style Guide.

Spell personal names exactly as given by the constituent. If it is unclear which name(s) should be considered "first," "last," or "middle," consult the constituent before entering the data. Type all diacritical marks (e.g. for â, è, í, ö, ñ, etc.)

Names

Field(s)	Rule	Example
Last name	• Enter exactly as spelled by the constituent, including diacritical marks.	Constituent: Laurence Quarré **Last name**: Quarré
	• If the last name consists of more than one name, enter all parts in the Last name field, maintaining the constituent's preferred capitalization and spacing.	Constituent: John van Duzer **Last name**: van Duzer Constituent: Mary DiRienzi **Last name**: DiRienzi Constituent: Roberto Gonzalez Echevarria **Last name**: Gonzalez Echevarria Constituent: George Washington-Park **Last name**: Washington-Park
	• If you are not sure whether a name is part of the last name or a middle name, contact the constituent.	

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Field(s)	Rule	Example
	• If "Jr." or any other addition appears as a part of the last name, enter it in the **Suffix** field (see below).	Constituent: Eli Mueller Jr. **Last name**: Mueller Constituent: John Joseph Jones III **Last name**: Jones
First name **Middle name**	• Enter the first name (legal name) as spelled by the constituent • Enter the whole middle name (if known) as spelled by the constituent. • If only a middle initial is available, enter that in the **Middle Name** field.	Constituent: John Quincy Smart **Last name**: Smart **First name**: John **Middle name**: Quincy Constituent: LouAnn Q. McGregor **Last name**: McGregor **First name**: LouAnn **Middle name**: Q
	• If the first name is hyphenated, enter both parts of the first name in the First Name field, using the hyphen.	Constituent: Mary-Jane Doe **Last name**: Doe **First name**: Mary-Jane **Middle name**:
	• If a compound first name is not hyphenated, enter both parts of the first name in the First Name field.	Constituent: Mary Sue Jones **Last name**: Jones **First name**: Mary Sue **Middle name**:
	• If you are not sure whether a name is part of the first name or a middle name, contact the constituent.	

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Field(s)	Rule	Example
	• If more than one middle name is given, enter them all in the Middle Name field.	Constituent: Jean-Pierre Francis Xavier Smith **Last name**: Smith **First name**: Jean-Pierre **Middle name**: Francis Xavier
	• If more than one middle initial is given, enter it as indicated by the constituent.	Constituent: Jean-Pierre F. X. Smith **Last name**: Smith **First name**: Jean-Pierre **Middle name**: F.X.
	• If the constituent gives an initial for the first name and spells out the middle name, enter the initial in the First name field and the middle name in the Middle name field.	Constituent: J. Paul Jones **Last name**: Jones **First name**: J. **Middle name**: Paul

Prefix	• Use only the following prefixes – select from list of values:
	
	    • Mr.
	    • Mrs.
	    • Ms.
	    • Miss
	    • Dr.
	    • Fr.
	    • Sr.
	    • Br.
	    • Lt.
	    • Capt.
	    • Maj.
	    • Lt. Col.
	    • Col.
	    • Gen.
	    • Adm.
	    • Rev.
	    • Rabbi
	    • Hon.
		Constituent: Dr. J. Michael Doe III
		
		Prefix: Dr.
		
		Last name: Doe
		
		First name: J.
		
		Middle name: Michael
		
		Suffix: III

Field(s)	Rule	Example

Suffix	• Use period after abbreviations ending in a lower case letter, except in degree names.
	
	• Use only the following suffixes:
	
	  • Sr.
	  • Jr.
	  • I
	  • II
	  • III
	  • IV
	  • M.D.
	  • Ph.D.
	  • Esq.	

Preferred name / Nickname	• Enter exactly as given by the constituent.	

Biographical Information

Field(s)	Rule	Example

Ethnicity	• Enter as indicated by constituent from listed options:
	  • Caucasian
	  • African American
	  • Asian/Pacific Islander
	  • Hispanic/Latino
	  • Multiracial
	  • Native American
	  • Middle Eastern
	  • Other	

	• Enter 'Other' as designated by the constituent in the Other field	
	• Never change a designation unless instructed by the constituent.	

Marital Status	• Enter marital status as defined by:
	  • Single
	  • Married
	  • Partner
	  • Separated
	  • Divorced
	  • Widow
	  • Widower	

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Field(s)	Rule	Example
Gender	• Enter as single letter for gender: • Male = M • Female = F	
	• If you are not sure whether a name is part of the last name or a middle name, contact the constituent. • If gender is unknown and the option exists enter 'unk'.	

Relationships

Field(s)	Rule	Example

Relationship	• Enter the explicit relationship between the constituents as defined by:
	    • Aunt
	    • Brother
	    • Brother-in-Law
	    • *Child*
	    • Consultant
	    • Cousin
	    • Daughter
	    • Daughter-in-Law
	    • Education
	    • Employee
	    • Employer
	    • Father
	    • Father-in-Law
	    • Friend
	    • Granddaughter
	    • Grandfather
	    • Grandmother
	    • *Grandparent*
	    • *Grandparents*
	    • Grandson
	    • Guardian
	    • Husband
	    • Mother
	    • Mother-in-Law
	    • Nephew
	    • Niece
	    • *Parents*
	    • Partner
	    • Referral
	    • Sister
	    • Sister-in-Law
	    • Son
	    • Son-in-Law
	    • *Spouse*
	    • Stepbrother
	    • Stepdaughter
	    • Stepfather
	    • Stepmother
	    • Stepsister
	    • Stepson
	    • Uncle
	    • Wife
		Relationship: Stepfather

Reciprocal	• If the field exists, enter the reciprocal relationship between the constituents.	**Relationship**: Mother **Reciprocal**: Daughter

Field(s)	Rule	Example
	• For the fields **Relationship** and **Reciprocal,** please be as specific as possible when defining the relationship using the value list.	
	• When defining relationship between people and organizations please include a **Start** and **End** date for the relationship	**Start**: 7/1/1994 **End**: 6/30/2012
	• If a Status field exists please select the appropriate value for the list provided.	**Status:** Inactive

Addresses Telephone

Field(s)	Rule	Example

Address	• Enter street address and apartment number (if applicable), or PO box number.
	
	 • Use up to 2 lines if necessary.
	
	 • Use the following abbreviations:
	
	   • Apartment - Apt
	   • Avenue - Ave
	   • Boulevard - Blvd
	   • Building - Bldg
	   • Circle - Cir
	   • Floor - Fl
	   • Heights - Hgts
	   • Highway - Hwy
	   • Lane - Ln
	   • Place - Pl
	   • Road - Rd
	   • Room - Rm
	   • Station - Sta
	   • Street - St
	   • Suite - Ste
	   • Terrace - Ter
	   • Turnpike - Tpke
	
	 • For a complete list of all street abbreviation please use the list provide by the USPS: https://www.usps.com/send/official-abbreviations.htm
		Address: 15 Main St
		
		 Address: 123 W 45 St Apt 67
		
		 Address: 89 Grand Ave Ste 10
		
		 Address: PO Box 333

	• If a street address includes a compass direction, use N, S, E, W, NE, NW, SE, or SW • If a street name is a numbered street, use the number only without the "-st", "-nd", "-rd", "-th" suffix.	**Address**: 241 W Main St Apt 3B **Address**: 1200 Pennsylvania Ave NW **Address**: 13 E 67 St

Field(s)	Rule	Example
	• If the address name requires two lines either enter in into a second line field or with a carriage return (¶).	**Address**: 235 Broad St. Carriage House **Address**: 123 Broad St. Apt.12
City **Town**	• Enter the complete city or town name. • If the city or town name includes a compass direction, spell out the entire word.	**City**: New York City **Town**: Upper Montclair **Town**: West Orange
State	• Enter the 2- character capitalized abbreviation. Do not enter any periods.	New Jersey = NJ Connecticut = CT New York = NJ
Zip Code	• Enter the 5-digit zip code, or the 9-digit hyphenated zip- plus-four if known.	**Zip Code**: 06511 **Zip Code**: 06511-0123
Telephone number	• Enter the number in the Telephone field. Include area code for all numbers. Do not include the initial '1' in the number.	**Telephone number**: 800-555-1234

	• Enter the phone number in the appropriate field or use the appropriate field label:
	  • Home
	  • Work
	  • Mobile
	  • Home Fax
	  • Work Fax	

Employment

Field(s)	Rule	Example
Field	• Enter as indicated by constituent or if not field designation enter based on judgement made form position & title	Education Finance
Position	• Enter as indicated by constituent.	Administrator Director
Title	• Enter as indicated by constituent.	Head of Campus Vice President of Sales

Education

Field(s)	Rule	Example
School **College** **University**	• Enter the full name of the institution attended. Do not include abbreviations.	New York University Notre Dame University
	• If a the institution's name includes a compass direction, use the full name.	Northwestern University Southern Mississippi
	• Include location of the institution if part of the name,	University of Colorado at Boulder University of California at Santa Barbara
	• If the institution's title begin with 'The' include it in the name	The Taft School The College of Wooster The College of New Jersey
Degree	Include the abbreviation of the degree granted: • A.A. • A.S. • B.A. • B.F.A. • B.S. • M.A. • M.S. • M.B.A • M.Ed • Ph.D. • Ed.D. • J.D. • M.D. • D.D.S. • D.O.	
Major	Enter major as defined by constituent or from available option in value list.	
Year of Graduation	Enter the four digit graduation year.	**YOG**: 2012

Internet

Field(s)	Rule	Example
Email	Enter the address as indicated by the constituent.	

| Field(s)	Rule	Example

	• Enter the email address in the appropriate field(s)or use the appropriate field label:
	   • Personal
	   • Work
	   • Other	

	• Use the 'Preferred' indicator for direct person-to-person or person-to-group communications. • Use the 'News' indicator for the email to be used for school news and information (mass mailings). • Use the 'Directory' indicator for the **ONE** email address to be used by a family for publication in the school directory.	

Internet Locators	Enter the account information and field label for the locator.
	
	• Use appropriate field label for locator type from defined list.
	   • Twitter
	   • AIM
	   • iChat
	   • Skype
	   • Jabber	

	• For Twitter accounts only include account name. Exclude the '@' symbol	**Twitter**: accountname

	For web addresses do not include the 'http://' or 'https://' in the web site URL.
	
	• Enter URLs in appropriate field(s) and/or use defined field labels to indicate type of site.
	   • Web
	   • Blog
	   • Facebook
	   • LinkedIn
	   • Google+
		Web: www.school.org

6. Appendix

A. Data Domains, Ownership, Entry and Support - EXAMPLE

Data Domains, Entry, Ownership & Support
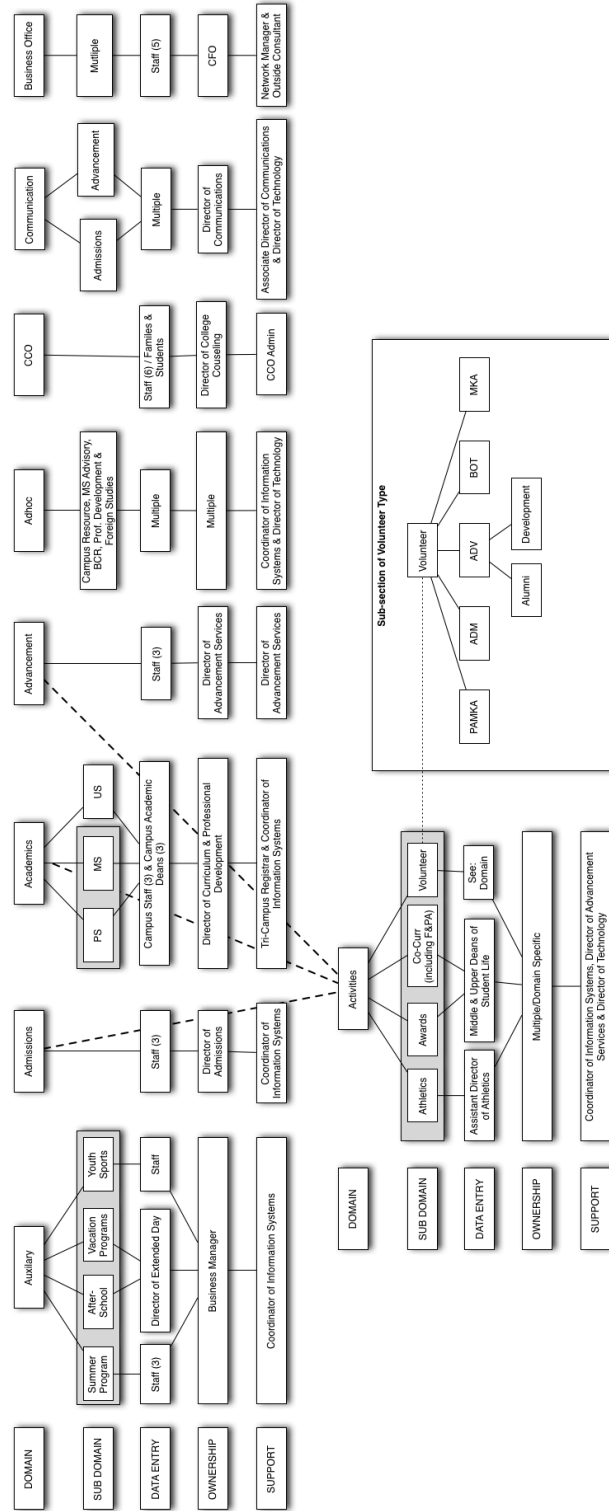
B. Data Flow Chart - Admissions, Advancement & Academics - EXAMPLE

Data Flow Chart - Admissions, Advancement & Academics (potentially Human Resources)
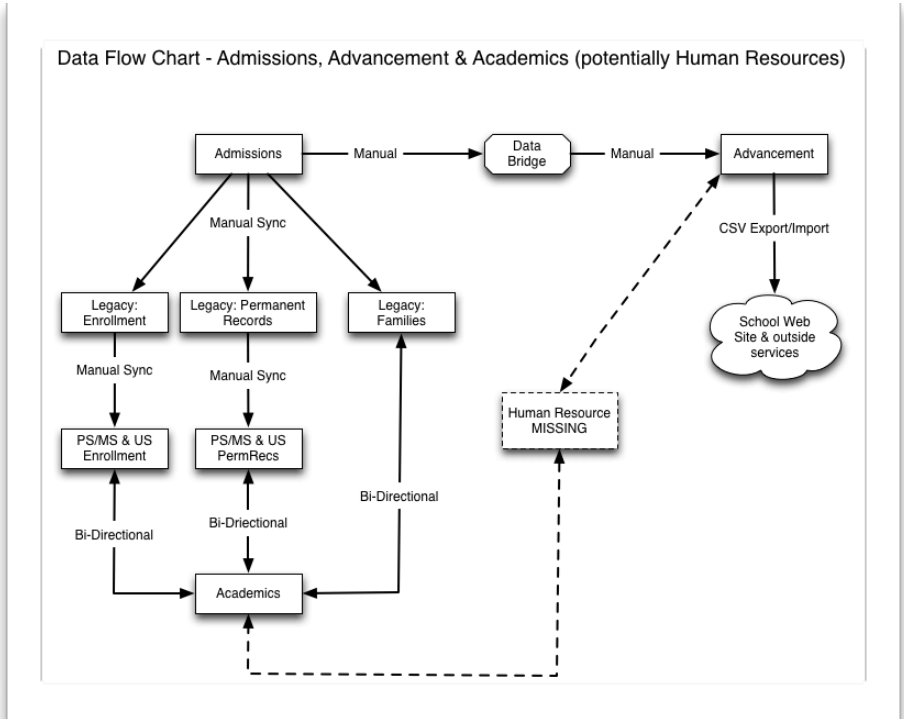
C. EXAMPLES OF DATA RELATED ISSUES

i. DATA FLOW & ENTRY

CASE: EMAIL ADDRESS INPUT AND CASCADING SYSTEMS ISSUE(S)

System: Admissions

Father, Mr. Primary Contact, has two email addresses entered:

Email: spouse@aol.com - actually wife's email address
&
Dad Email: primary@workaddress.com - actual address using ad hoc field label

This error of entering the father's email address in the mother's record and using this invalid label existing in 456 family records in Admissions

System: Families (Admissions)

Data is exported from Admissions into Families for both parents.

Only one field exists in Families to hold the "email" address and both "Email" & "Dad Email" are combined single field. Since spouse@aol.com was entered first as "Email" it take primary position in display.

This system feeds development and each of the academic systems.

System: Fam/Dev Sync (Admissions/Development)

System for viewing out-of-sync data shows records between Development & Families (bridged Admissions data).

Data between two systems is seen as incorrect for a number of reason, however the email data is again "incorrect".

System: Development

Data imported from Fam/Dev Sync is incorrect and needs to be manually corrected. A determination need to be made as to which is the correct address for each constituent. In some case this may be easy to do, in other it may not.

Pager	
FAX	
Email	spouse@aol.com primary@workaddress.com

ii. LOGICAL FLOW OF DATA AND OWNERSHIP

CASE: DIRECTORY CHANGE FORM

SYSTEMS: Admissions, Families (Admissions & Academics), Development & *Communications (currently leverages other systems)*

The directory "Additions & Corrections" addendum is sent out as a follow-up to the Directory. On the front page of the addendum it asked that people notify the Office of External Affairs of any additions or corrections.

Current family data needs to be owned by one office and all changes should be made from that office then propagate through the existing systems on a regular basis.

iii. DATA OWNERSHIP & ENTRY

CASE: MIDDLE SCHOOL PERMANENT RECORD CARD

SYSTEM: Academics

NEED: A Middle School Permanent Record Report needs to be generated from academic system (similar to Upper School Transcript). Report will include quarterly marks for grades six, seven and eight and CTP scores need to be include for grade four, six and eight. Currently, these score are report on each hardcopy of the existing cards via stickers.

INPUT/OWNERSHIP ISSUE: Currently the CTP test administration is handled by the Assistant Head of Campus, however once the scores are reported there is no process for entering the score data into the academic system.

OWNERSHIP/INPUT NEED: Ownership of the entire CTP process test needs to include the input of the scores once reported back to the school. A person needs to be identified for the timely input of these scores once reported to the school in order to accomplish the desired output need.

ADDITIONAL POINT: The need for this data to be inputed in the academic system will have benefit in other areas including the generation of dashboard reports, for the comparison of year-to-year and a potential correlation to other academic data already in the system

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Official Permanent Record Report

The Montclair Kimberley Academy (C.E.E.B code 310815) is an independent, coeducational institution serving students in pre-kindergarten through twelfth grade and is accredited by Middle States.

Address: NJ 07044
Phone:

Date of Birth:
Social Security Number:
Year Entered:
Year of Graduation:

Grading Scale: A B C D = Pass, F = Fail, Inc = Incomplete, Pass/Fail, EX = Exempt, MED = Medical

Term: Q1 = 1st Quarter, Q2 = 2nd Quarter , Q3 = 3rd Quarter, Q4 = 4th Quarter

8th Grade 2010-2011	Q1	Q2	Q3	Q4	7th Grade 2009-2010	Q1	Q2	Q3	Q4	6th Grade 2008-2009	Q1	Q2	Q3	Q4
Geometry	A-	A	A-	A	Algebra	A-	B+	A	A-	Pre-algebra	A	B	B	A
English	A	A	A	A	English	A	A	A	A	English	A-	A-	A	A
History	A	A	A-	A-	Lunch					Social Studies	A	A-	A	A-
Science	A	A	A	A	Lunch					Science	B+	A-	A	A
Spanish II	B+	B+	A-	A-	Lunch					Spanish	A	A	A	A
Music-8			A		Lunch					Art			P	
Performance Ensemble	A				Lunch					Dance-6	P			
Performance Study-8				A	Lunch					Drama-6		P		
Chorus		P		P	Lunch					Music-6				P
Visual Art-8		A			Lunch					Band-6				

— CTP Scores —

	Grade 4											Grade 6											Grade 8										
	Scale Score	Nat Norm %	Nat Norm Stanine	Sub Norm %	Sub Norm Stanine	Ind Norm %	Ind Norm Stanine	School Norm %	School Norm Stanine	NAIS %	NAIS Stanine	Scale Score	Nat Norm %	Nat Norm Stanine	Sub Norm %	Sub Norm Stanine	Ind Norm %	Ind Norm Stanine	School Norm %	School Norm Stanine	NAIS %	NAIS Stanine	Scale Score	Nat Norm %	Nat Norm Stanine	Sub Norm %	Sub Norm Stanine	Ind Norm %	Ind Norm Stanine	School Norm %	School Norm Stanine	NAIS %	NAIS Stanine
Verbal Reasoning		1																															
Vocabulary	1	1										2	2	2	2		2																
Reading Comprehension	1		1	1								2			2	2																	
Writing Mechanics	1			1	1	1						2			2	2		2	2														
Writing Concepts & Skills	1			1	1	1						2	2	2			2		2														
Quantitative Reasoning	1				1	1	1					2	2				2	2															
Mathematics 1 & 2	1					1	1					2																					

Additional Comments
<Field Missing>

Transcript is unofficial unless embossed school seal is present here.

Official School Signature: _____ **Date:** _____

iv. (Un)Available and Corresponding Fields

CASE: EDUCATION DATA OWNED BY ADMISSIONS BUT LACKS CORRESPONDING FIELDS IN DEVELOPMENT.

SYSTEM: Admissions & Development

NEED: To track constituent educational information at the time a family provides that to the school. The first opportunity for this is in the admissions process.

INPUT/OWNERSHIP ISSUE: Currently there is a single field in the Admissions to track this data. There are multiple data point need and additional fields are required.

Colleges/universities attended and degree(s) granted:

University of Pennsylvania		BA		Note:		
Biology		1975			Start:	End:
University of Pennsylvania		MA		Note:		
Biology		1976			Start:	End:
University of Pittsburg		MD		Note:		
		1980			Start:	End:

DOMAIN/SYSTEM ISSUE: If the Admission domain owns this data then their system needs to be modified to be able to track the required data points.