

Person & Organization Entry Standards



Education That Works



What?

- Establishes standards for use of names
- Avoids duplicate and inaccurate records
- Designates record stewards
- Provides helpful tips for finding, creating, and maintaining records

Why?

Quality of data entry = Quality of data integrity

Six years since existing guide was updated
(formerly known as Name & Address Entry Standards)

Revision of the document

- Created and maintained by DIG. Special thanks to:
 - Lisa Anh Nguyen
 - Stephen Brouwers
 - Lindsey Pierce
 - Jay Anderson
 - Kathy Bronson
 - Elizabeth Cole
 - Sarah Steidl
 - Chris Sweet
 - Vanessa Vicente

Do I need to review the new document?

YES!

...but who? Everyone?

- **All** employees who can access person & organization records in Colleague
- DIG will distribute the guide to all new employees as applicable
- Managers/trainers should be especially familiar with it

Guide Highlights

- Different methods to search for records (helps avoid duplicates)
- Formatting standards for names, addresses, phone numbers, etc.
- Clarity on which name fields to use for which purposes
- Minimal data set required for all person records
- Lives in myClackamas under Resources tab

Remaining Needs

- Policy and standardization of backdoor registrations
 - Multiple registration tools/paper forms used, collecting inconsistent/incomplete data
 - Often no explicit consent provided by student, causing liability concerns
 - Backdoor registrations contribute to large portion of duplicate records
 - Many students entering through “backdoor” ultimately pursue credit/degrees/certificates
 - Inconsistency in use of backdoor versus standard entry process
- Continued inclusion of and outreach to Harmony and Wilsonville staff
- Ongoing training and reinforcement of importance of this guide
- Better use of available technologies, less reliance on manual data entry

Questions?