

# Procedure Guide: Creating and Managing NAR Records

## 1. Introduction

This guide responds to a request for help in establishing data standards and rules for formatting and entering names, addresses, phone numbers, and email addresses in a system to avoid duplicates. It provides practical steps, formatting rules, validation methods, and governance roles applicable to any organisation managing a Name and Address Register (NAR).

## 2. Objectives

Establish clear formatting rules for NAR data elements

Minimise duplicate records through validation and standardisation

Support consistent data entry across systems

## 3. Data Standards and Formatting Rules

### 3.1 Names

Use Title Case for all names (e.g., John Smith)

Avoid nicknames unless used as preferred name

Separate given name and family name into distinct fields

Use a controlled vocabulary for name types (e.g., Person, Organisation)

[Add an example of what correct and incorrect metadata application for NAR looks like]

### 3.2 Addresses

Follow Australia Post formatting standards

Use standard abbreviations (e.g., St for Street, Rd for Road)

Validate against authoritative sources like G-NAF or AMAS

Include separate fields for Address Line 1, Address Line 2, Suburb, State, Postcode, Country

[Include list of commonly used address metadata. You may be able to apply them as drop down options in your systems to better support control]

### 3.3 Phone Numbers

Use international format: +61 for Australia

Remove spaces, brackets, and dashes

Validate using regex or phone number libraries

[Add an example of what correct and incorrect metadata application for NAR looks like]

### 3.4 Email Addresses

Convert to lowercase

Trim leading/trailing spaces

Validate format using regex

Ensure uniqueness across the system

[Add an example of what correct and incorrect metadata application for NAR looks like]

## 4. Duplicate Prevention

Implement validation checks during data entry

Use fuzzy matching algorithms to detect near-duplicates

Require mandatory fields for record creation

Regularly audit and merge duplicate records

## 5. Governance Roles

Data Steward: Monitor data quality and resolve duplicates

System Owner: Ensure compliance with data standards

Information Management Analyst: Define and update standards

Privacy Officer: Ensure compliance with privacy legislation

## 6. Review and Maintenance

Review standards annually or upon system changes

Provide training to staff on data entry procedures

Update validation tools and reference datasets regularly