





OAKS Entry Guidelines


 All Supplier Operations transactions in OAKS FIN must be completed using CAPITAL letters only.


 DO NOT use ANY special characters in the supplier name such as apostrophe, period, pound sign, etc. The ONLY special character used in the Supplier name is a hyphen and ampersand characters.

 DO NOT use ANY special characters (i.e., apostrophe [']; period [.]; hash-tag [#]), when entering addresses.

- Acceptable special characters: forward slash [/]; dash [-]; and ampersand [&].


 If supplier forms list an acronym after the business name, add the acronym after the business name (**do not** add as a DBA).


 The only punctuation used in the supplier name is a dash (-) if it is used on the W-9 form.

 If the company name begins with "The" and contains more than two words, "The" should not be included. If the company name only contains one word after "The," then "The" should be included. For example, "The Home Store" would be entered as "Home Store" because it contains more than 2 words, but "The Cafe" would be entered as "The Cafe" because it only contains 1 word following "The."



- Exception: "The Ohio State University" is always entered as "The Ohio State University."

 If the supplier name contains "and," (e.g., John Doe and Associates), enter "and" as the ampersand character (&).


 Forms are acceptable if there is an omission of the direction prefix from the address (i.e., if the street has a North, South, East, West or combination of these before the street name in OAKS FIN, but it's not listed on the form or vice versa).

 Verify spelled out house numbers (e.g., "One East Main Street" for "1 East Main Street") with [USPS](#). If both show as valid addresses, the numbering convention takes precedence.


 Floor or Suite # ranges are acceptable (e.g., "Suite #s 200-204").


 Click [here](#)  for instructions on forms that contain only Lock box, drawer, file #, department #, etc. in the address.


- When a form is received that only contains a Lock box, drawer, file #, etc. in the address, enter it into OAKS FIN as a PO Box #.
- For example - "File # 7247, Columbus, Ohio 19170-7531" should be entered in OAKS FIN as "PO Box 7247, Columbus, Ohio 19170-7531."
- If both addresses are listed, go to the [USPS](#) website and verify the address, then enter the Lock box, drawer, or file number on **Address Line 1** in OAKS FIN and the PO Box on **Address Line 2** in OAKS FIN.


 If the "Supplier Information Form" contains the physical street address **and** the Post Office Box (PO Box) address on the same address line, verify that the address in [USPS](#) combines both addresses on a single line. If they are combined in a single line in **USPS**, then enter the address in OAKS FIN exactly as listed in **USPS**. If they are not combined in **USPS**, then each address must be added to the supplier record as a


separate address.

 Business names containing Company, Corporation, Incorporated should be abbreviated to CO, CORP, INC, etc.

 Supplier Names containing ".com" (for example: Healthy Parent.Com should be entered as HEALTHYPARENT COM) there must be a space in place of the dot.

 If the supplier name contains a period, the period should not be entered and the letters should be compressed (for example: J.P. Moving Company should be entered as JP MOVING CO).

 In the event a supplier provides multiple pieces of documentation (VIF, W9, EFT) and the zip codes do not match each other on the forms and/or vary within the OAKS system, verify which zip code is accurate by using USPS and make the necessary updates.

 Effective date rows can only be edited next day.

USPS Address Entry Guidelines

- **United States Postal Service (USPS)** look up by Zip: <https://tools.usps.com/go/ZipLookupAction!input.action>
- Most commonly used street abbreviations (Road should be abbreviated to RD, Drive to DR, Street to ST, Court to CT, Parkway to PKWY, etc.).
- Most commonly used unit designators:
 - Suite should be entered as STE
 - Department should be entered as DEPT
 - Apartment should be entered as APT
 - Building should be entered as BLDG
 - Floor should be entered as FL
 - Room should be entered as RM
- Do not spell out directional references for street addresses (example: 123 North Main St should be entered in OAKS as 123 N Main St.) but City & States should be spelled out (example: North Canton & South Dakota).
- US HWY must be completely spelled out as US Highway, ST RT must be completely spelled out as State Route, CR/ CNTY Rd must be spelled out as County Road, CNTY HWY must be spelled out as County Highway, TR must be completely spelled out as Township Road, etc.
- If there is a discrepancy on any forms &/or in the system where there are two different cities listed but the zip codes are the same, as long as it can be verified in USPS, either is acceptable and OAKS does not have to be updated.
- If there is a discrepancy on any forms &/or in the system when the last number of the zip code is off by 1 digit such as 43016 & 43017 either is acceptable because they are both considered Dublin, Ohio.