

MAED STANDARDS COMMITTEE

**NAMING CONVENTIONS AND
INDEXING BEST PRACTICES**

(January 6, 2023)

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Introduction

Purpose of the Index

The Assessors assessment roll has come to be a central repository for current and accurate property owner information. As assessment rolls have become digitized the need to search and index on those records has become more and more important. To that end, uniformity of how owner names are entered into the system has a direct impact on the searchability and usefulness of the database. This concern is only expanded in larger assessing offices where multiple clerks are entering names into the database. If one clerk enters data following a different naming convention from the other, then the likelihood of indexing the data accurately becomes highly unlikely. This document seeks to provide a best practices method for entering this data into the assessor's database in order to create consistency and improved searchability of the data.

The adoption of these best practices for implementation into the Assessor's database should be made with consideration of the current state of the Assessor's data and the intended direction of the data into the future. While uniformity of data improves the overall quality, efficiency, and confidence in searching that data, Assessors should first consider the impact on other users of the data, both internal and external to the organization, before adopting these best practices.

Credit

This best practices document was developed in direct alignment with the PRIA (Property Records Industry Association) Indexing Best Practices document (2022). MAED Standards Committee received authorization from PRIA to use the PRIA document to accomplish this alignment. Just as this document seeks to be the best practices index for Assessors around the State of Michigan, the PRIA Indexing Best Practices documents seeks to be the standards for Clerk/Registers around the nation. As Assessors receive their documents from the County Clerk/Register of Deeds office it makes sense to align the best practices together as much as possible.

Section 1. General Guidelines

1. Capitalization of Letters

- A. Recommend upper case letters throughout the index. BSA converts lower to upper case unless selected otherwise.

2. Corrections

- A. Index data as it appears on the documents. This statement applies to all applicable fields within BSA. If it is spelled incorrectly on the document, input exactly as shown unless demonstrated otherwise on further correcting documents.

3. Numbers

- A. Arabic numbers stay as numbers (e.g., 1, 2, 3, 4, 10).
- B. Roman numerals stay as numerals (e.g., I, II, III, IV, X).

4. Abbreviations

- A. The BSA sale record has a 35-character field length limitation for both Grantor and Grantee. If sufficient space is provided, DO NOT ABBREVIATE, unless the abbreviation is on the document.
- B. If insufficient space is provide for all parties, list those that can be as indicated in the document reserving the last 5 character spaces and insert 'Et Al' and list the remaining names in the 'Extended Comments' field.

5. Punctuation and Special Characters in Organization/Corporation Names

Use punctuation when necessary to keep the integrity of a name.

- A. If there is a possessive apostrophe ('), use it (e.g., JOE'S).
 - B. If there is an apostrophe (') in a name, use it (e.g., O'MALLEY'S).
 - C. If there is a period (.), use it (e.g., BANK.COM).
 - D. If there is a comma (,), use it (e.g., ROMER, COOK & JONES).
 - E. If there is a hyphen (-), use it (e.g., ROSS-JONES APOTHOCARY).
 - F. If there is a slash (/), use it (e.g., ROSS/JONES APOTHOCARY).
 - G. If there are any other special characters, use them (e.g., @, #, \$, &).
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Section 2. Indexing Individual Names

1. Single Last Names

Index as: LASTNAME FIRSTNAME MIDDLENAME/INITIALS SUFFIX

Name(s) on Document	Index Entry
Richard Marshall	MARSHALL RICHARD
John J. Brown	BROWN JOHN J
Dorothy Brown	BROWN DOROTHY

William Samuel Jones III	JONES WILLIAM SAMUEL III
J R Smith	SMITH J R

NOTE: Avoid the use of “Mr.” and “Mrs.” Use only when first name for the individual is not presented. When back indexing historical records, it may be necessary to consider the following examples.

Mrs. John J Brown	BROWN JOHN J MRS
Mrs. Brown	BROWN MRS

2. Last Name Prefixes and Compound Names

If unsure of last name or middle name, index as follows:

Name(s) on Document	Index Entry
Mary Der Kegian	DER KEGIAN MARY
John Mac Donald	MAC DONALD JOHN
Walter Van de Kamp	VAN DE KAMP WALTER
Ted de Grazia	DE GRAZIA TED
John L. St. George	ST GEORGE JOHN L
Jean Saint Martin	SAINT MARTIN JEAN
Dorothy Ste. Marie	STE MARIE DOROTHY
Diane de la Varga	DE LA VARGA DIANE

3. Hyphenated Last Names of Individuals

Use the hyphen as follows:

Name(s) on Document	Index Entry
Cecil P. Spring-Rice	SPRING-RICE CECIL P
Blanche Duff-Gordon	DUFF-GORDON BLANCHE

4. Common Middle Name or Two Word Last Name with No Hyphen

Index as follows:

Name(s) on Document	Index Entry
Joyce Martin Gray	GRAY JOYCE MARTIN
Hernando Gomez Gonzalez	GONZALEZ HERNANDO GOMEZ

5. Individual Names Beginning with Honorary Title

Any known honorary title should be ignored.

Name(s) on Document	Index Entry
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Rev. John W. Jones	JONES JOHN W
Captain Robert Baker	BAKER ROBERT
The Honorable Roy Jones	JONES ROY

6. Individual Names Ending with Professional Title

Any known professional title should be ignored.

Name(s) on Document	Index Entry
Betty R. Smith, CPA	SMITH BETTY R
Norma Jane Baker, MD	BAKER NORMA JANE
Judson Starr, Esq.	STARR JUDSON

7. Parentheticals and Nicknames

If the name presented appears to be a nickname and is typed or signed, DO pick up the variation with or without special characters.

Name(s) on Document	Index Entry
James (Jim) Smith	SMITH JAMES JIM
George "Rocky" Brown	BROWN GEORGE ROCKY
Mary (Smith) Brown	BROWN MARY SMITH

8. "Also Known As" or "Formerly Known As" Names (a/k/a and f/k/a)

Index as shown:

Name(s) on Document	Index Entry
Mary Smith Brown a/k/a Mary Smith	BROWN MARY SMITH
Jean Jones Williams f/k/a Jean Jones	WILLIAMS JEAN JONES

9. Individual's Name Abbreviated

Index as presented:

Name(s) on Document	Index Entry
Chas. Jackson	JACKSON CHAS
Wm. Gardner	GARDNER WM
Jos. Brown	BROWN JOS

10. Trust Names

Index as LASTNAME FIRSTNAME MIDDLE INITIAL TRUST as shown below

Index as follows:

Name(s) on Document	Index Entry
John J Smith Living Trust	SMITH JOHN J LIVING TRUST

11. Misspelled Names.

Index as presented on document. If possible, note that document is indexed as presented.

Index as follows unless subsequent documentation (PTA, PRE, etc) corrects the error:

Name(s) on Document	Index Entry
Dyylan Eric Jones	JONES DYLLAN ERIC
Megan Ann Smmith	SMMITH MEGAN ANN

Section 3. Indexing Multiple Names/Spouses

1. Common Last Name

Index as: LASTNAME FIRSTNAME(1) MIDDLENAME/INITIALS SUFFIX(1) & FIRSTNAME(2) MIDDLENAME/INITIALS SUFFIX(2)

Name(s) on Document	Index Entry
Richard and Donna Marshall	MARSHALL RICHARD & DONNA
John J. Brown and Linda Brown	BROWN JOHN J & LINDA
Dorothy P. Brown and Bruce L. Brown	BROWN DOROTHY P & BRUCE L
William Samuel Jones III and Jane Marie	JONES WILLIAM SAMUEL III & JAN
J R Smith and Mrs. J R Smith	SMITH J R & MRS

2. Different Last Name

Index as: LASTNAME(1) FIRSTNAME(1) MIDDLENAME/INITIALS SUFFIX(1) & LASTNAME(2) FIRSTNAME(2) MIDDLENAME/INITIALS SUFFIX(2)

Name(s) on Document	Index Entry
Richard Pen and Donna Marshall	PEN RICHARD & MARSHALL DONNA
John J. Brown and Linda L Smith	BROWN JOHN J & SMITH LINDA L
Dorothy Jane Brown and Peter Jones	BROWN DOROTHY JANE & JONES PETER

Section 4. Indexing Corporation/Organization Names

1. General Rules

Names of Corporations/Organizations

- A. Recommended format: Index official name ~~it~~ as seen/shown.
- B. Use "The" at the beginning of a firm name if it is part of the official name.
- C. Use "A" at the beginning of a firm name if it is part of the official name.

Punctuation Marks

- A. Use punctuation marks and symbols.
- B. If there is a possessive apostrophe ('), use it (e.g., JOE'S).
- C. If there is an apostrophe (') in a name, use it (e.g., O'MALLEY'S).
- D. If there is a period (.), use it (e.g., BANK.COM).
- E. If there is a comma (,), use it. (e.g., ROMER, COOK & JONES).
- F. If there is a hyphen (-), use it. (e.g., ROSS-JONES APOTHCARY).
- G. If there is a slash (/), use it. (e.g., ROSS/JONES APOTHCARY).
- H. If there are any other special characters, use them (@, #, \$, &).

2. Organization Names Containing Given Names or Initials

Index as follows:

Name(s) on Document	Index Entry
A L Johnson Corporation	A L JOHNSON CORPORATION
J and A Smith Co	J AND A SMITH CO
Marshall Field and Co	MARSHALL FIELD AND CO
Montgomery Ward & Co	MONTGOMERY WARD & CO
J. C. Penney	J. C. PENNEY
B. W. Paper Box Corp.	B. W. PAPER BOX CORP.
Virginia Insurance Corporation	VIRGINIA INSURANCE CORPORATION
Cecil W. Spring-Rice Title Co	CECIL W. SPRING-RICE TITLE CO
David Mac Donald Escrow	DAVID MAC DONALD ESCROW
Crown Savings Bank of New York	CROWN SAVINGS BANK OF NEW YORK
DiTech.com	DITECH.COM
Net.B@nk	NET.B@NK

3. Organization Names Containing Hyphens, Commas, Apostrophes, Slashes, Parenthesis, Numbers, Symbols and Letters.

Index as the names appear as follows:

Name(s) on Document	Index Entry
Romer, Cooke, and Jones Inc.	ROMER, COOKE, AND JONES INC.
O'Malley and Johnson, Inc.	O'MALLEY AND JOHNSON, INC.
Bar-B-Q Pit of Florida	BAR-B-Q PIT OF FLORIDA
Ed's Bar B-Q	ED'S BAR B-Q
M & A Alexander Productions	M & A ALEXANDER PRODUCTIONS
D/3 Aluminum Products, Inc.	D/3 ALUMINUM PRODUCTS, INC.
Joe D'Andre 1980's Bar	JOE D'ANDRE 1980'S BAR
Century 21 (R) Mortgage (SM)	CENTURY 21 (R) MORTGAGE (SM)
A-1 Auto Parts	A-1 AUTO PARTS
\$1 Store	\$1 STORE

No. 6 Speckels, Inc.	NO. 6 SPECKELS, INC.
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4. Multiple Names: Also Known As (a/k/a), Formerly Known As (f/k/a), Doing Business As (d/b/a), Successor By, As Trustee, etc.

Index as follows:

Name(s) on Document	Index Entry
Bank of America National Association as Trustee successor by merger to Lasalle Bank	BANK OF AMERICA (F/K/A) LASALLE BANK
24/7 Services Repair DBA Stamps Truck & Tire Repair	24/7 SERVICES REPAIR (DBA) STAMPS TRUCK & TIRE REPAIR
Generations Bank f/k/a First Community Bank	GENERATIONS BANK (F/K/A) FIRST COMMUNITY BANK

5. Location Words in a Firm Name

Index as follows:

Name(s) on Document	Index Entry
Crown Savings Bank of Iowa	CROWN SAVINGS BANK OF IOWA
Bank of Brandon at Lutz	BANK OF BRANDON AT LUTZ
Robinson's of Florida	ROBINSON'S OF FLORIDA
Pacific Finance Co. San Diego	PACIFIC FINANCE CO. SAN DIEGO
Steel & Iron Co Dallas	STEEL & IRON CO DALLAS
Baptist Church Orlando	BAPTIST CHURCH ORLANDO