Add/Change/Delete Preferred Names

SA – Student Administration Basics

This document contains steps on how to add/change and delete a student's preferred name.

1. Students should be able to add/change their preferred name via their Student Centre without staff assistance. However, the student cannot delete their preferred name without staff assistance. Student instructions can be found here.

2. Staff can add/change and delete a student's preferred name via PeopleSoft (PS) Campus Solutions (CS). The student's preferred name can be managed from either the **Names** link on the **Biographical Details** page or by going directly to the **Names** page.

Once the preferred name is added/changed in CS, it will be displayed in the following student systems.

ALMA – Library
Class rosters
ClockWork – Student Accessibility
Computer labs
CSIS – Active Living and Oval*
D2L
Elevate
Email/calendar
MS Teams
Self-service for updating email to reflect Preferred Name*
ServiceNow
StarRez – Residence*
Student Centre
Unicard (ID card, Upass)
YuJa
Zoom

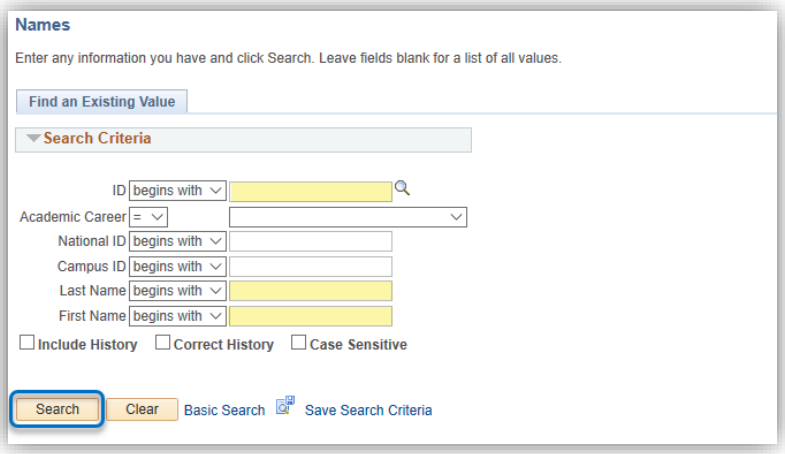
**Will be included as of March 31, 2023*

These student systems automatically default the display name to the student's preferred name in PS Campus Solutions, if one has been entered, otherwise the primary (legal name) is displayed.

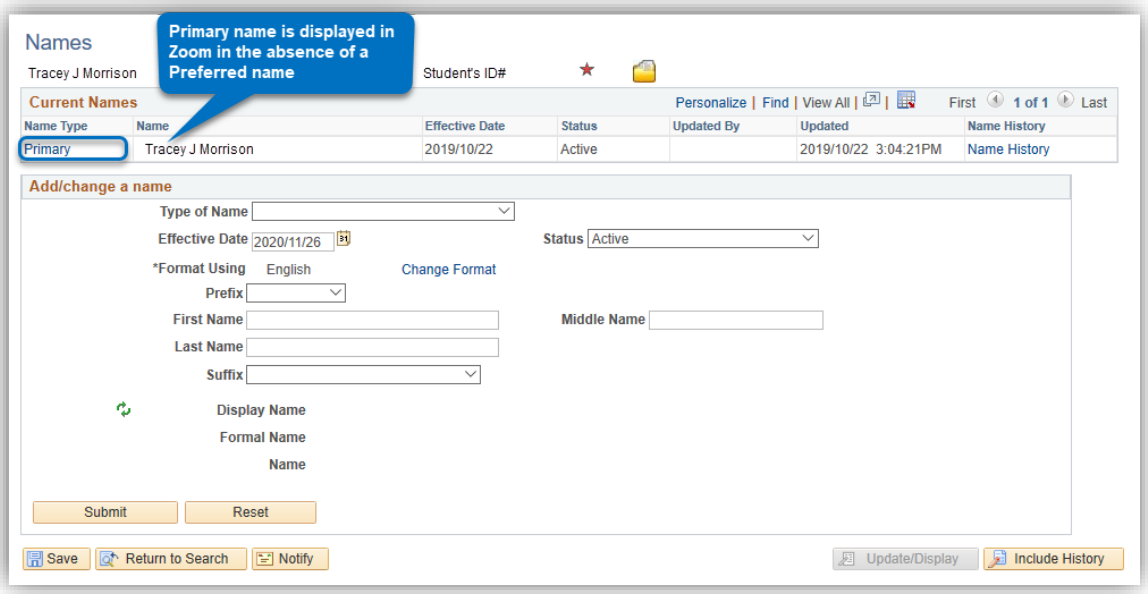
ADD/CHANGE A PREFERRED NAME

1. Navigate to **Main Menu > Campus Community > Personal Information (Student) > Biographical (Student) > Names**

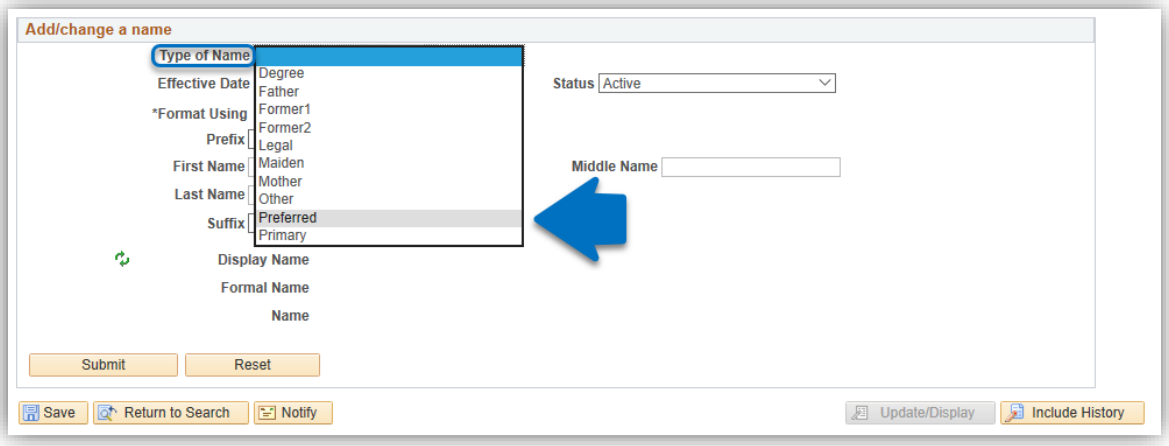
2. Enter any search criteria you may have, e.g. Empl ID, Last Name or First Name to find the individual. Click the **Search** button.



3. The **Names** page displays existing information, including a history of names for the student. For this example, the Primary (Legal) name displays. This would be the name displayed in various student systems.



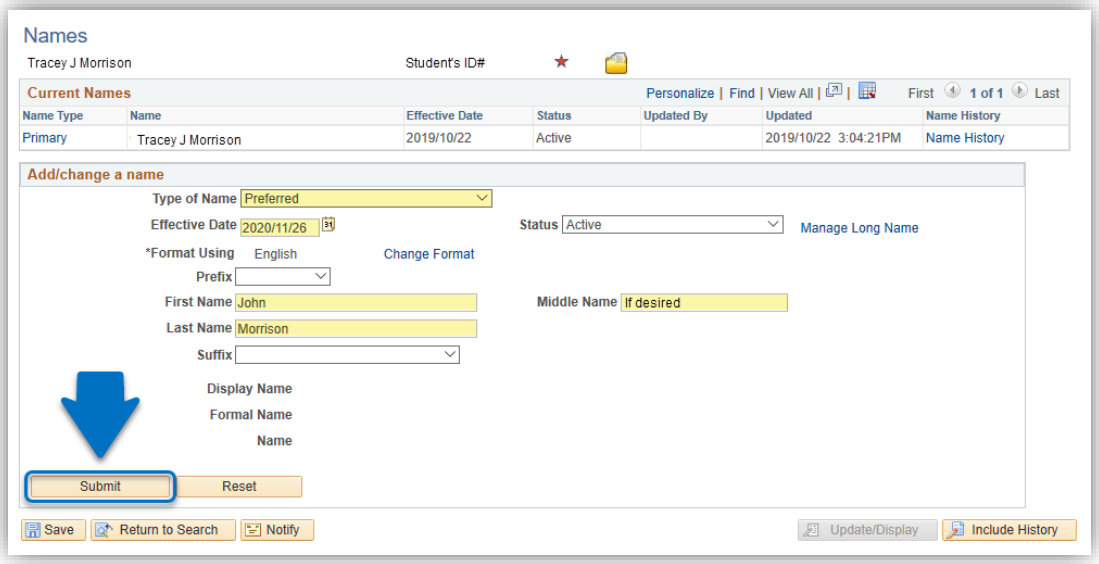
4. To add a preferred name, click on the **Type of Name** dropdown list. From the list, select **Preferred**.



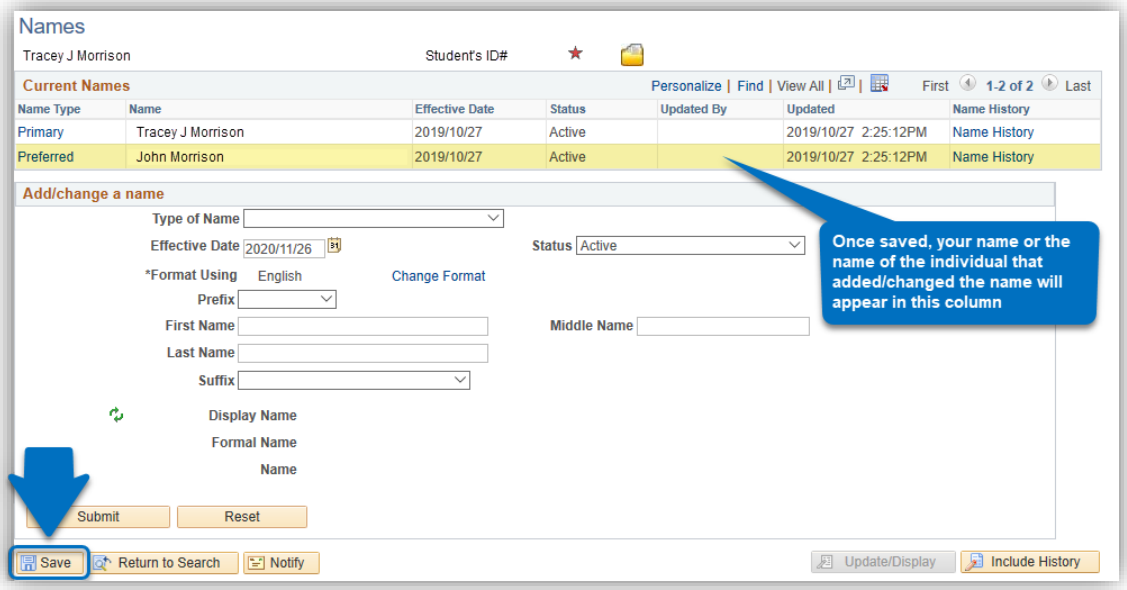
Adding/changing a preferred name is used when the student has a preferred name they wish to have displayed in Zoom; to be referred to in class (e.g. Class Roster) and in other campus systems (e.g. Student Career Centre, see list above). The Primary name represents the Legal name as the main category for a student name. Please avoid using “Other” and “Legal” type of name.

5. Enter the preferred First Name, Middle Name (if desired) and the Last Name. Ensure the **Effective Date** is set to either the day you are making the change or future dated for when the change takes place. Click the **Submit** button.

   NOTE: Any erroneous or derogatory requests for name changes will be subject to non-academic misconduct. Staff may report suspected incidents of misconduct to the Student Conduct Office by completing the Misconduct Incident Form.



6. The **Current Names** table will display all names that have been added/changed (e.g. John Morrison). When satisfied with the information in the table, click the **Save** button.



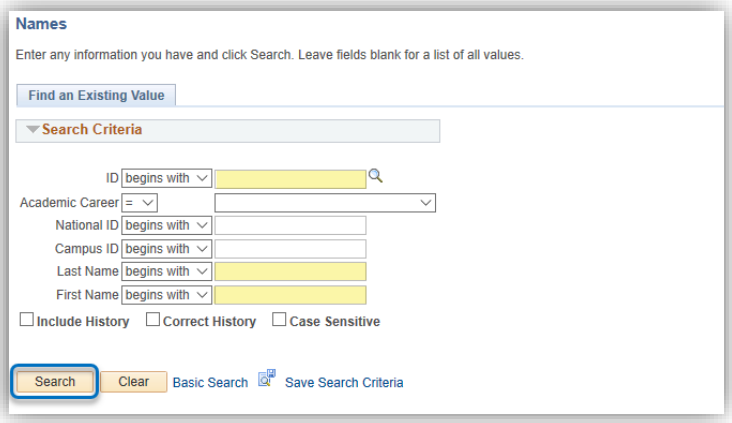
DELETE A PREFERRED NAME

Deleting a preferred name from the **Names** page requires the use of the **Correct History** button. Depending on your level of access, you may or may not be able to delete a preferred name from a student's name history as this function permanently deletes the name from all records. The **Correct History** function is only available in the **Names** component under Biographical (Student).

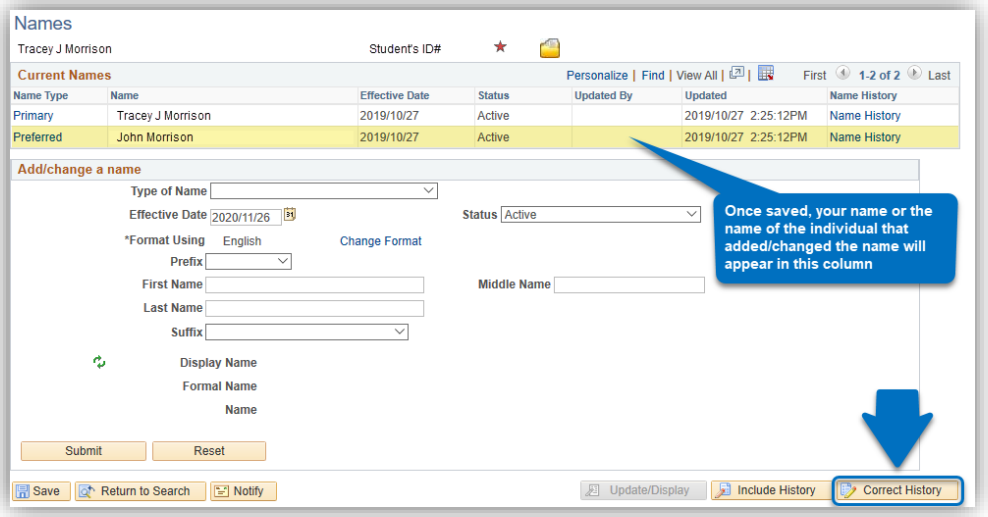
Students may request their preferred name be deleted. This feature is not available to students in their Student Centre since we would like to maintain a record of all forms of identity ever used at the University. They require staff assistance with this request and staff may choose to replace the existing preferred name with their primary name so that preferred and primary match (follow steps outlined above to change a preferred name); or if the circumstance is appropriate, delete the name permanently from the records.

1. Navigate to **Main Menu > Campus Community > Personal Information (Student) > Biographical (Student) > Names**

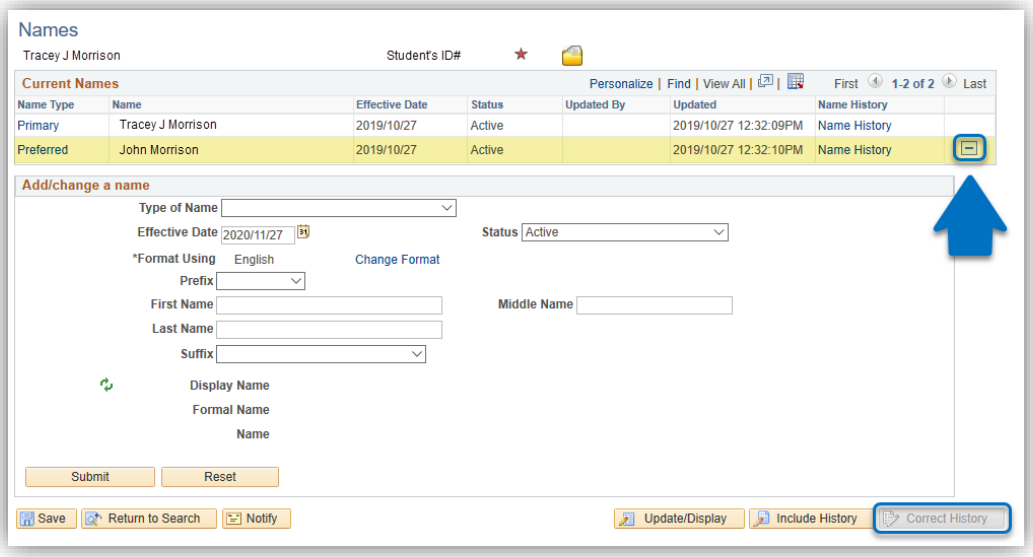
2. Enter any search criteria you may have, e.g. Empl ID, Last Name or First Name to find the individual. Click on **Search**.



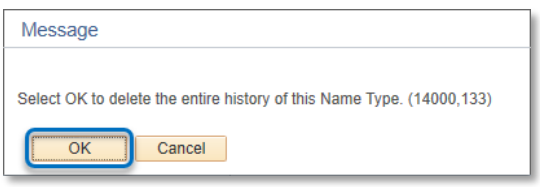
3. On the **Names** page, the preferred name will be displayed in the **Current Names** table (e.g. John Morrison). To delete this preferred name, click **Correct History**.



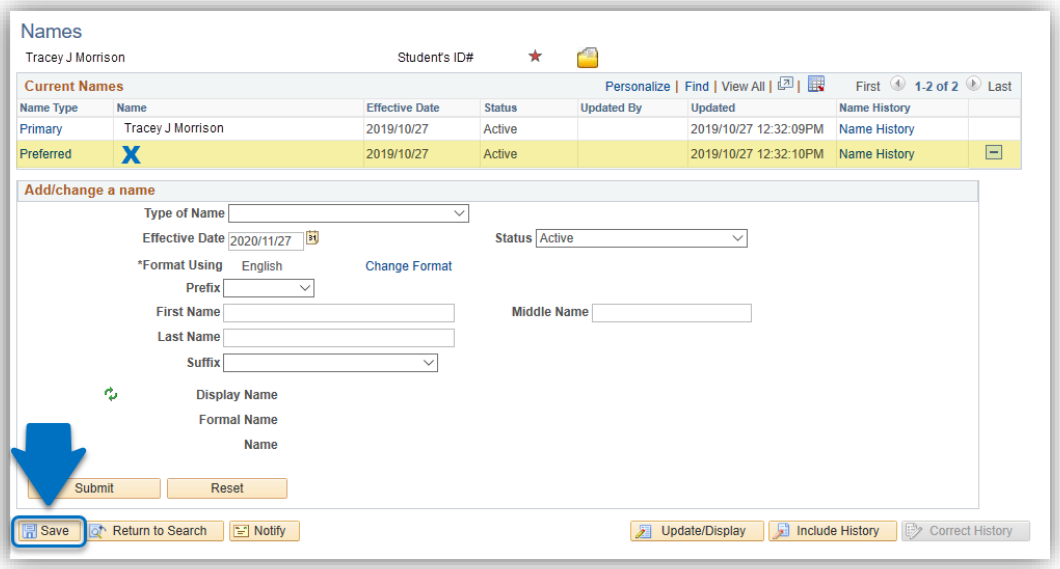
4. After clicking Correct History, it triggers the correction mode and the Correct History button appears greyed-out or inactive. A minus sign displays at the end of the preferred name line. Click the **minus sign** to delete the preferred name.



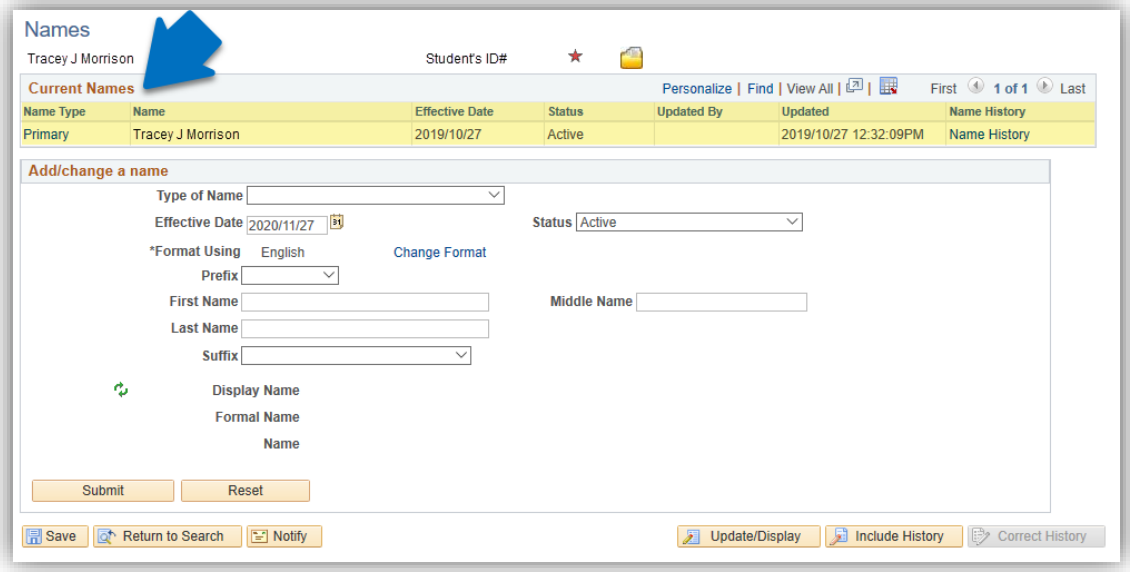
5. The following message will display. Click on **OK** to accept the change.



6. Note the preferred name has been deleted from the **Current Names** table. Click on **Save**.



7. The Current Names table will display the Primary name and/or any other names if entered.



End of Procedure