

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

*Will be included as of March 31, 2023

MS Teams

Self-service for updating email to reflect Preferred Name*

ServiceNow

StarRez – Residence*

Student Centre

Unicard (ID card, Upass)

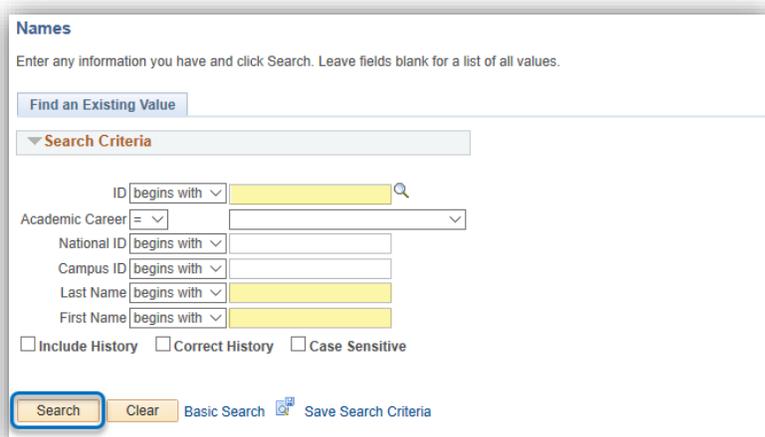
YuJa

Zoom

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.



Names

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

ID begins with []

Academic Career []

National ID begins with []

Campus ID begins with []

Last Name begins with []

First Name begins with []

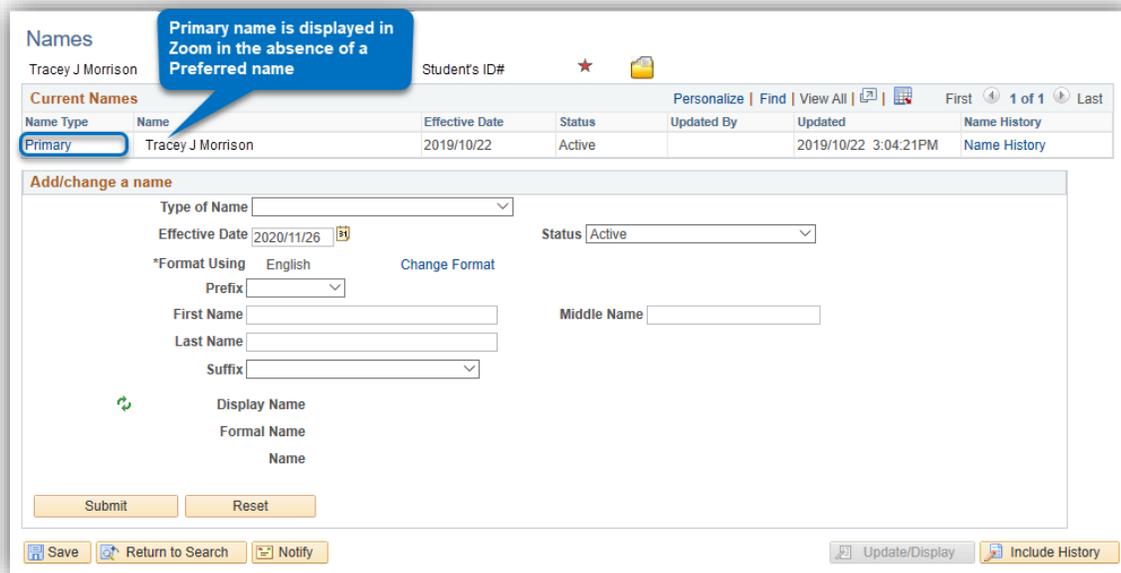
Include History Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

Add/Change/Delete Preferred Names

SA – Student Administration Basics

- 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.



Names

Tracey J Morrison Student's ID# ☆ 📄

Personalize | Find | View All | 📄 | 📄 | First 1 of 1 Last

Name Type	Name	Effective Date	Status	Updated By	Updated	Name History
Primary	Tracey J Morrison	2019/10/22	Active		2019/10/22 3:04:21PM	Name History

Add/change a name

Type of Name

Effective Date 2020/11/26

Status Active

*Format Using English Change Format

Prefix

First Name

Last Name

Middle Name

Suffix

Display Name

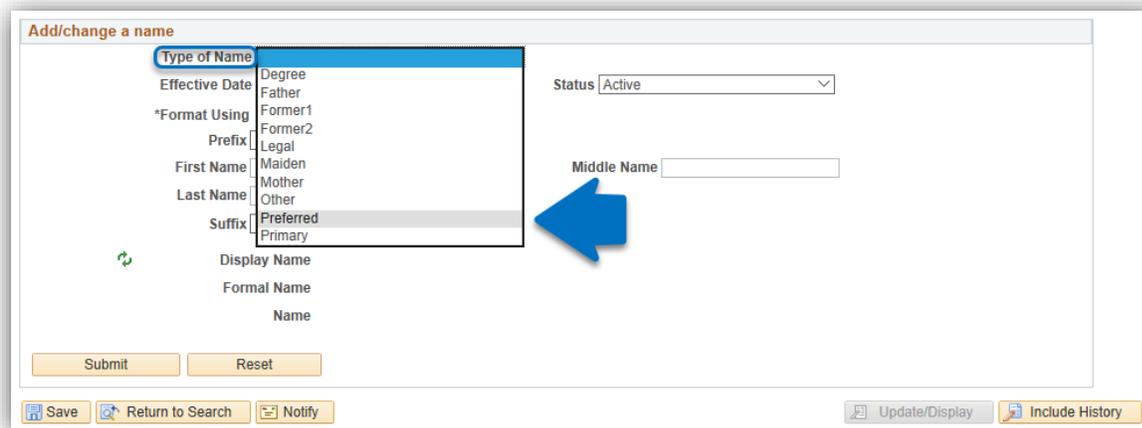
Formal Name

Name

Submit Reset

Save Return to Search Notify Update/Display Include History

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



Add/change a name

Type of Name

Effective Date

Status Active

*Format Using

Prefix

First Name

Last Name

Middle Name

Suffix

Display Name

Formal Name

Name

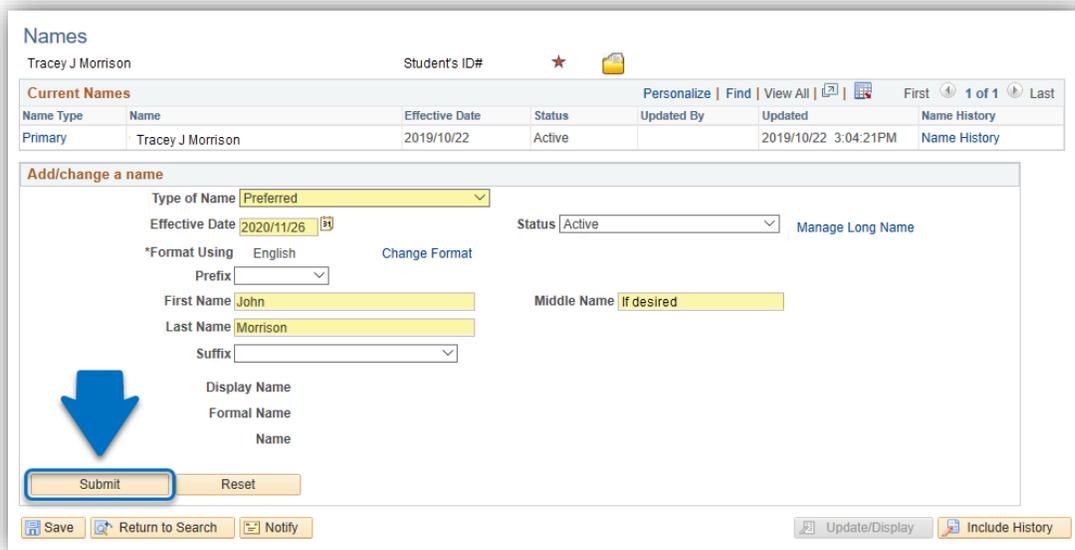
Submit Reset

Save Return to Search Notify Update/Display Include History

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.

- 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](#).



Names
Tracey J Morrison Student's ID# ☆

Current Names Personalize | Find | View All | First 1 of 1 Last

Name Type	Name	Effective Date	Status	Updated By	Updated	Name History
Primary	Tracey J Morrison	2019/10/22	Active		2019/10/22 3:04:21PM	Name History

Add/change a name

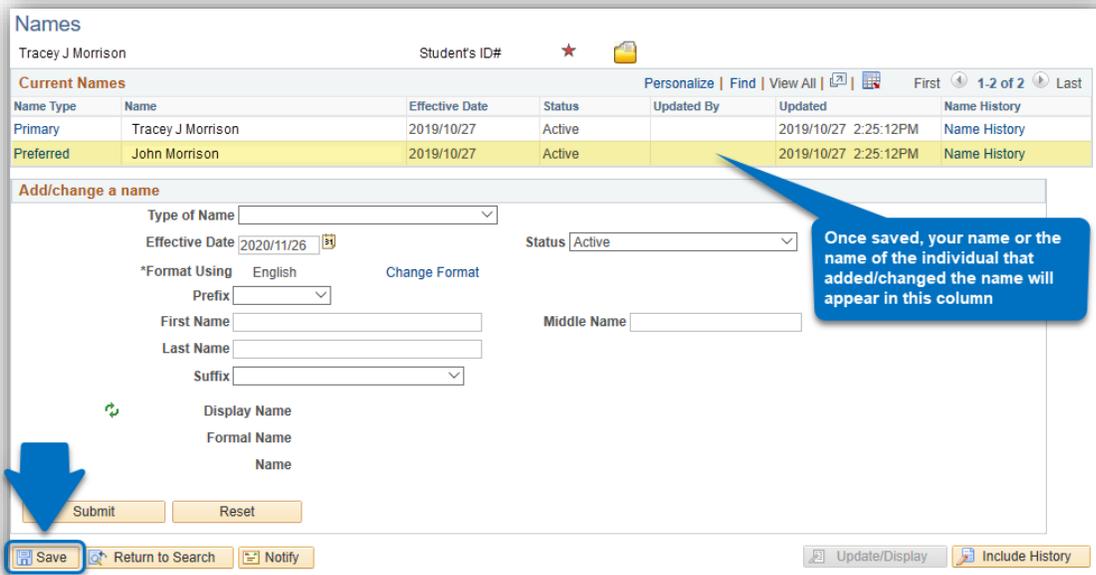
Type of Name: Preferred
 Effective Date: 2020/11/26
 Status: Active
 *Format Using: English
 Prefix: [dropdown]
 First Name: John
 Middle Name: If desired
 Last Name: Morrison
 Suffix: [dropdown]

Display Name
 Formal Name
 Name

Submit Reset

Save Return to Search Notify Update/Display Include History

- 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.



Names
Tracey J Morrison Student's ID# ☆

Current Names Personalize | Find | View All | First 1-2 of 2 Last

Name Type	Name	Effective Date	Status	Updated By	Updated	Name History
Primary	Tracey J Morrison	2019/10/27	Active		2019/10/27 2:25:12PM	Name History
Preferred	John Morrison	2019/10/27	Active		2019/10/27 2:25:12PM	Name History

Add/change a name

Type of Name: [dropdown]
 Effective Date: 2020/11/26
 Status: Active
 *Format Using: English
 Prefix: [dropdown]
 First Name: [input]
 Middle Name: [input]
 Last Name: [input]
 Suffix: [dropdown]

Display Name
 Formal Name
 Name

Submit Reset

Save Return to Search Notify Update/Display Include History

Once saved, your name or the name of the individual that added/changed the name will appear in this column

Add/Change/Delete Preferred Names

SA – Student Administration Basics



DELETE A PREFERRED NAME

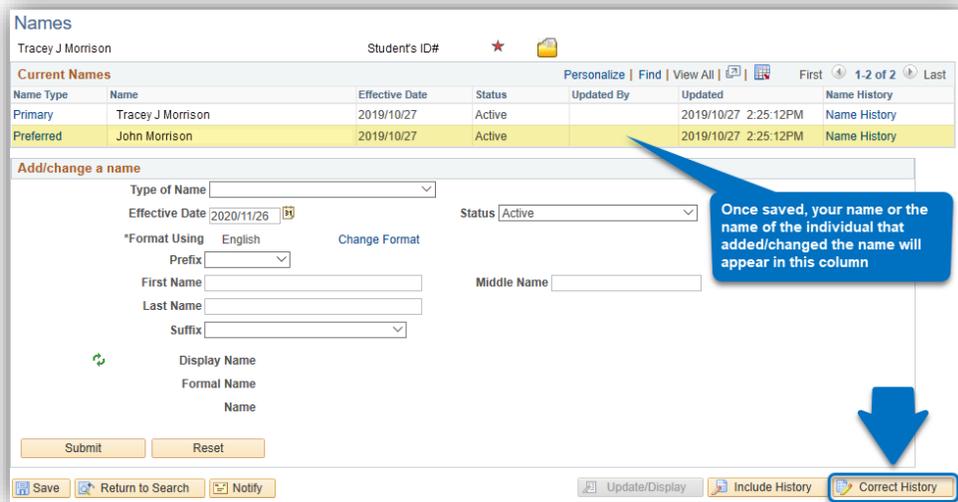
Deleting a preferred name from the **Names** page requires the use of the **Correct History** button. Depending on your level of access, you may or may not be able to delete a preferred name from a student's name history as this function permanently deletes the name from all records. The **Correct History**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

A screenshot of the "Names" search interface. At the top, it says "Names" and "Enter any information you have and click Search. Leave fields blank for a list of all values." Below this is a "Find an Existing Value" button. A "Search Criteria" section contains several search fields: "ID" (dropdown: "begins with", text input: yellow), "Academic Career" (dropdown: "=", text input: white), "National ID" (dropdown: "begins with", text input: white), "Campus ID" (dropdown: "begins with", text input: white), "Last Name" (dropdown: "begins with", text input: yellow), and "First Name" (dropdown: "begins with", text input: yellow). At the bottom of the search criteria are three checkboxes: "Include History", "Correct History", and "Case Sensitive". Below the search criteria are four buttons: "Search" (highlighted with a blue border), "Clear", "Basic Search" (with a magnifying glass icon), and "Save Search Criteria" (with a save icon).

- 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**.



Names
Tracey J Morrison Student's ID# ★ 📄

Current Names Personalize | Find | View All | 📄 | 📄 First 1-2 of 2 Last

Name Type	Name	Effective Date	Status	Updated By	Updated	Name History
Primary	Tracey J Morrison	2019/10/27	Active		2019/10/27 2:25:12PM	Name History
Preferred	John Morrison	2019/10/27	Active		2019/10/27 2:25:12PM	Name History

Add/change a name

Type of Name

Effective Date 2020/11/26 📅 Status Active

*Format Using English Change Format

Prefix

First Name Middle Name

Last Name

Suffix

Display Name

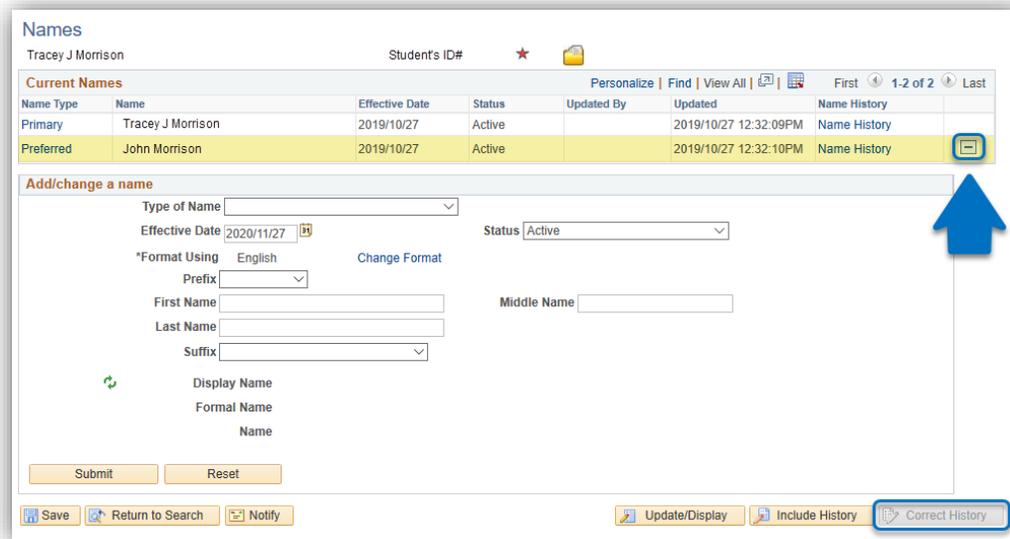
Formal Name

Name

Submit Reset

Save Return to Search Notify Update/Display Include History **Correct History**

- 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.



Names
Tracey J Morrison Student's ID# ★ 📄

Current Names Personalize | Find | View All | 📄 | 📄 First 1-2 of 2 Last

Name Type	Name	Effective Date	Status	Updated By	Updated	Name History
Primary	Tracey J Morrison	2019/10/27	Active		2019/10/27 12:32:09PM	Name History
Preferred	John Morrison	2019/10/27	Active		2019/10/27 12:32:10PM	Name History 

Add/change a name

Type of Name

Effective Date 2020/11/27 📅 Status Active

*Format Using English Change Format

Prefix

First Name Middle Name

Last Name

Suffix

Display Name

Formal Name

Name

Submit Reset

Save Return to Search Notify Update/Display Include History Correct History

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

Message

Select OK to delete the entire history of this Name Type. (14000,133)

OK Cancel

Add/Change/Delete Preferred Names

SA – Student Administration Basics



6. Note the preferred name has been deleted from the **Current Names** table. Click on [Save](#).

Names
Tracey J Morrison Student's ID#

Current Names							Personalize	Find	View All	First	1-2 of 2	Last
Name Type	Name	Effective Date	Status	Updated By	Updated	Name History						
Primary	Tracey J Morrison	2019/10/27	Active		2019/10/27 12:32:09PM	Name History						
Preferred	X	2019/10/27	Active		2019/10/27 12:32:10PM	Name History						

Add/change a name

Type of Name

Effective Date 2020/11/27 Status Active

*Format Using English [Change Format](#)

Prefix

First Name Middle Name

Last Name

Suffix

Display Name

Formal Name

Name

Submit Reset

Save Return to Search Notify Update/Display Include History Correct History

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

Names
Tracey J Morrison Student's ID#

Current Names							Personalize	Find	View All	First	1 of 1	Last
Name Type	Name	Effective Date	Status	Updated By	Updated	Name History						
Primary	Tracey J Morrison	2019/10/27	Active		2019/10/27 12:32:09PM	Name History						

Add/change a name

Type of Name

Effective Date 2020/11/27 Status Active

*Format Using English [Change Format](#)

Prefix

First Name Middle Name

Last Name

Suffix

Display Name

Formal Name

Name

Submit Reset

Save Return to Search Notify Update/Display Include History Correct History

End of Procedure