AN ANALYSIS ON USING PREFERRED NAMES FOR EMPLOYEES

RYAN DONELAN | FINANCE | 2017-2018 DIVERSITY CERTIFICATION COURSE

MY PROJECT

The ability to be able to use a *Preferred Name* instead of a *Legal Name*, when applicable, can be important for individuals whose *Preferred Name* best reflects their gender identify.

Therefore it is best that we ensure we are currently using the *Preferred Name* in areas where it is appropriate, and that it can be efficiently updated.

This project is meant to analyze a situation where a new or existing employee wishes to have a *Preferred Name* that is different than their *Legal Name*.

Key questions to answer include:

- What systems at Union store Name data?
- How is Name data entered into or synced between these systems?
- What output from these systems use Legal Name v. Preferred Name?

HOW NAMES ARE STORED

Legal Name: Typically *First Name* or *Last Name* in a database. Describing this as *Legal Name* helps people understand the use is only necessary in legal circumstances.

Preferred Name: The name an individual prefers to use. Storage varies widely between software systems. This could be an alternate form of a First Name, or an entire combination of First, Middle, and Last Names.

At Union most employee systems call this *Nickname* or *Preferred Name*. Colleague has recently introduced a new field called *Chosen Name*.

UNION'S GOAL

Ensure that Union College employees:

1) Have the option and means to identify a Preferred Name that is different from their Legal Name to the college

2) Have their Preferred Name appropriately used in areas where Legal Name is not required.
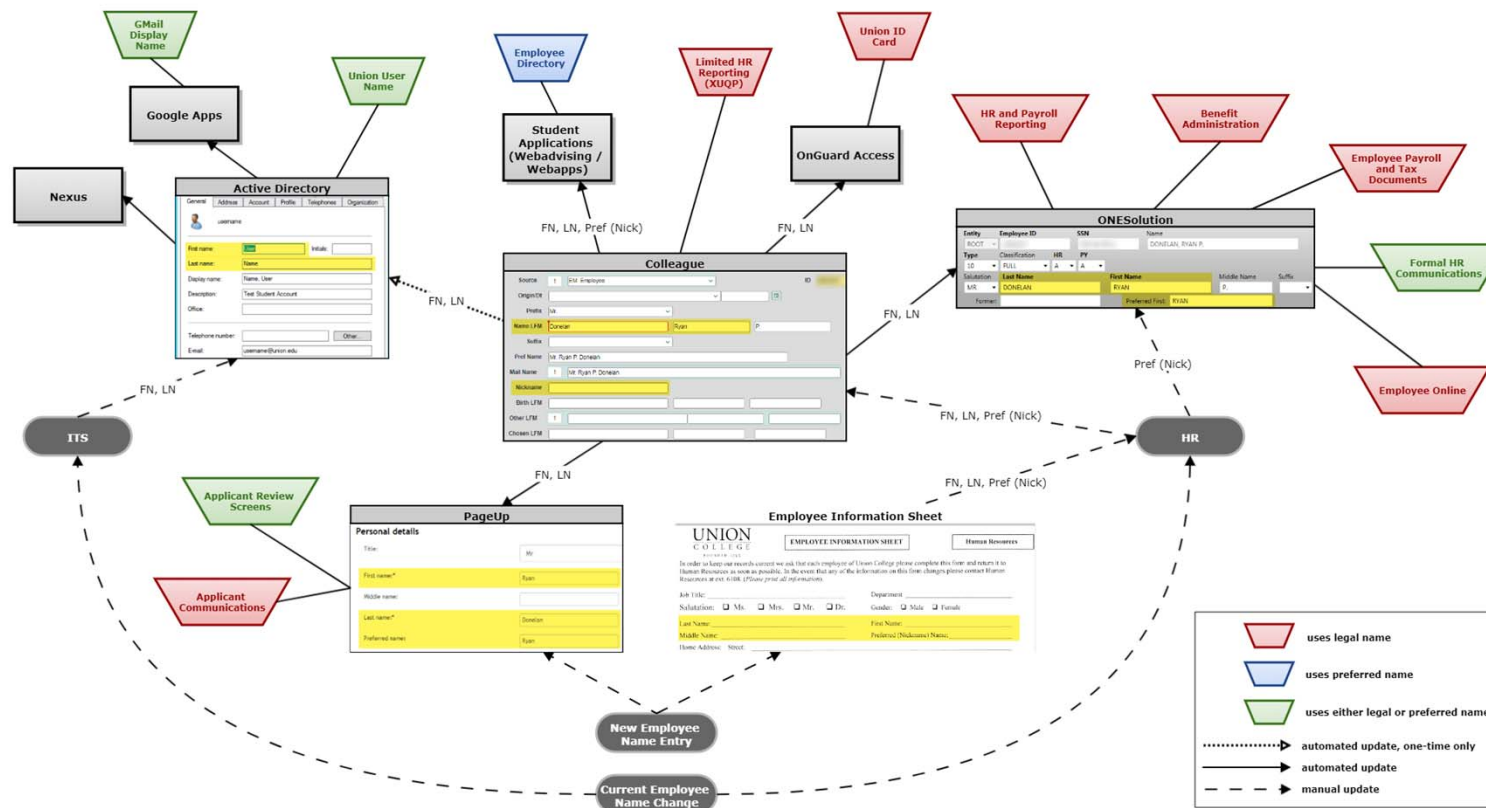
Examples:

Legal Name	Preferred Name
Christina Wilson	Chris Wilson
Huang Kim	Henry Kim
Jennifer D. Hudson	J.D. Hudson

KEY TAKE AWAYS

- Room for improvement to use Preferred Name on **Formal HR Communications** and **Applicant Communications**.
- Better syncing of name data is possible. For instance syncing Nickname from **Colleague to ONESolution** instead of a manual entry.
- **Active Directory** only currently has FN and LN fields. If a Preferred Name needs to be entered it is a manual, exception-based process.
- **Active Directory** only receives an initial one-time import of name, not an automatic update if there is a change. There is no formal process to alert ITS of a name change, requiring employee action.
- Additional alert suggested when a name change is synced to **OnGaurd Access** (to indicate that a new ID card should be printed).
- The **Employee Directory** uses Nickname, however this field was not actively maintained by HR.
- When a new employee applies for a job, **PageUp** primarily displays the Legal Name to managers and approvers.
- Preferred Name to be required entry in **PageUp**.
- Opportunity exists to develop policy guidelines encouraging preferred name use when possible.

VISUALIZATION OF UNION SYSTEMS, NAME DATA FLOW, AND OUTPUT

The diagram below shows the primary systems that hold employee name data, how the data is synced or updated, and what name data is used in their outputs.

NAME POLICY GUIDELINES

Sample name guidelines are often publically available, such as the below example from University of Arizona.