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.

**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.

**Examples**:

<table>
<thead>
<tr>
<th>Legal Name</th>
<th>Preferred Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Huang Kim</td>
<td>Henry Kim</td>
</tr>
<tr>
<td>Jennifer D. Hudson</td>
<td>J.D. Hudson</td>
</tr>
</tbody>
</table>

**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.

**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 OnGuard 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.

**NAME POLICY GUIDELINES**

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

**AN ANALYSIS ON USING PREFERRED NAMES FOR EMPLOYEES**

Ryan Donelan | Finance | 2017-2018 Diversity Certification Course

**Visualizations 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.

**Examples**:

<table>
<thead>
<tr>
<th>Legal Name</th>
<th>Preferred Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Christina Wilson</td>
<td>Chris Wilson</td>
</tr>
<tr>
<td>Jennifer D. Hudson</td>
<td>J.D. Hudson</td>
</tr>
</tbody>
</table>