

Biographical Data Maintenance

Names

Description

This script will describe how to use the **Names** page in **Biographical (Student)** to modify or add a name type on a person's existing record. Every person is assigned a Primary and a Preferred name type (derived from primary until it is changed). Other name types are available and can be added or modified as needed.

Process Steps

Navigation: Campus Community > Personal Information (Student) > Biographical (Student) > Names

Step 1: The Names Search Page

- 1.1 When you navigate to the **Names** page, you will see the search page below called "**Find an Existing Value.**"
 - 1.1.1 **EmplID:** If you know the student's EMPLID, enter it here. This is the most efficient way to search for a student.
 - 1.1.2 **Academic Career:** You can enter the student's career, e.g., undergraduate or graduate.
 - 1.1.3 **National ID:** If you know the student's National ID number (Social Security Number for USA, Social Insurance Number for Canada), enter it here.
 - 1.1.4 **Campus ID:** The University of Maine System is not currently using the Campus ID.
 - 1.1.5 **Last Name:** You can enter a portion of the last name as search criteria.
 - 1.1.6 **First Name:** You can enter a portion of the first name as search criteria.
 - 1.1.7 You can save (and name) your search parameters by clicking the [Save Search Parameters](#) link.
 - 1.1.8 Click to continue or to have the system clear all of the text boxes so you can start again.

Names

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

Find an Existing Value

EmpID: 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

[Basic Search](#)

Step 2: Names Page

On the **Names** page, you may choose to modify an existing Type of Name for the person, or add a new Type of Name to the record.

2.1 Modifying an Existing Name

2.1.1) If *Primary* Name changes add an effective-dated row to change the *Primary* name.

For changes to other name types:

2.1.2) All the current **Name Type** entries for this person will be at the top of the page.

2.1.3) Select the **Type of Name** that you wish to modify, e.g., *Preferred* in this example.

Names
Wesley Crusher 0136979

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

Name Type	Name	Effective Date	Status	Name History
Primary	Wesley Crusher	12/06/2004	Active	Name History
Preferred	Wesley Crusher	12/06/2004	Active	Name History

Add/change a name

Type of Name: Preferred
 Effective Date: 10/13/2005
 Status: Active
 Format Using: English [Change Format](#)
 Prefix:
 First Name: Wes
 Last Name: Crusher
 Suffix:
 Display Name:
 Formal Name:
 Name:
 Submit Reset

[Save](#) [Return to Search](#) [Notify](#) [Update/Display](#) [Include History](#) [Correct History](#)

2.1.4) Notice that a new **Effective Date** of today is defaulted.

2.1.5) Edit the name fields as needed. In this case, the person has reported a new preferred first name.

2.1.6) When finished, click on [Save](#) at the bottom of the page. This person now has a modified Preferred name effective 10/13/2005.

2.2 Adding a New Name Type

To add a name, you must insert a row at the **Add/change a name** level.

2.2.1) Choose the **Type of Name** you wish to add, and enter the new name as needed. In this case, the person wants a *Diploma* name that is different from his *Preferred* name. The middle name of Tiberius has been added. Notice the effective date is today.

Names

Wesley Crusher 0136979

Name Type	Name	Effective Date	Status	Name History
Primary	Wesley Crusher	12/06/2004	Active	Name History
Preferred	Wesley Crusher	12/06/2004	Active	Name History

Add/change a name

Type of Name: Diploma

Effective Date: 10/17/2005

Status: Active

Format Using: English [Change Format](#)

Prefix:

First Name: Wesley

Last Name: Crusher

Suffix:

Middle Name: Tiberius


Display Name:

Formal Name:

Name:

Submit Reset

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

2.2.2 Click  (refresh) to update the display name formats to reflect any changes made in any of the name fields.

Names

Wesley Crusher 0136979

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

Name Type	Name	Effective Date	Status	Name History
Primary	Wesley Crusher	12/06/2004	Active	Name History
Preferred	Wesley Crusher	12/06/2004	Active	Name History

Add/change a name

Type of Name:

Effective Date: Status:

Format Using: [Change Format](#)

Prefix:

First Name: Middle Name:

Last Name:

Suffix:

Display Name: Wesley Crusher
Formal Name: Wesley Crusher
Name: Crusher,Wesley Tiberius

- 2.2.3 Click to submit data *before* saving the page. Submitting the data changes the data in the **Current Names** area so that you can view the changes, and clears all fields in the Add/change a name area.

Names

Wesley Crusher 0136979

Name Type	Name	Effective Date	Status	Name History
Primary	Wesley Crusher	12/06/2004	Active	Name History
Preferred	Wesley Crusher	12/06/2004	Active	Name History
Diploma	Wesley Crusher	10/17/2005	Active	Name History

Add/change a name

Type of Name: ▼

Effective Date: 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

2.2.3 Once finished, click **Save** to save this new name type. **Warning:** You must hit **Save** to save the change to the database. This person now has a *Diploma* name added to his record.

Source Documents

Social Security Card, Admissions Application, Driver's License, Marriage Certificate, Adoption papers, Passport, or other legal name change documentation. (We expect that document management will provide an audit trail.)

Security (Functional) Roles

Maintained by:

S_RA_SUPERUSER	S_RA_LEADER
S_RA_RECRUITER	S_RA_APPLICATION_REVIEWER
S_RA_DATA_ENTRY	S_RA_QUICK_ADMIT

Registrars, registrar staff, registration staff.

FINAL

University of Maine System
Student Administration Process

Viewable by everyone

APPROVED and TESTED by Admissions and Campus Community Team on January 9, 2006

Effective Date: July 31, 2006
Updated: 5/10/2006

NamesBP.doc
Learning Solutions 8.90.01
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