Maintaining Student Names

Description

Several types of names can be stored in a student’s bio-demo data. This Guide covers how to add or update a name. Name types used by the UMS are: Primary (legal name), Preferred, Diploma and Former. Names are effective dated, which means that when you change a name you add another row for that name type. This maintains a history of name changes. It isn’t necessary to have all name types entered. However, everyone in Campus Community will have at least a Primary name. They will also have a Preferred name which is created from the Primary name when the person is entered into the database.

Students and applicants can enter/change their Preferred and Diploma names through self-service. Primary and Former names must be entered by staff, after examining documents such as Social Security cards, marriage or divorce certificates, etc. Student employees are responsible for informing Human Resources about their name changes as well.

For more detailed coverage of this subject, see the Business Process: CC002 Names.

Navigation

Campus Community > Personal Information (Student) > Biographical (Student) > Names
Step 1: Search for the person.

Some fields may be populated based on your User Defaults.

Enter criteria and click **Search**

This brings up the **Names** page.
Step 2: The Names Page

In our example to the right, Charlotte has 2 names: Primary and Preferred.

To either add a new type of name or change an existing name, you can use the Add/Change a Name fields below the Current Names list.

To add a NEW type of name, use the Type of Name pull-down menu to select the type, then fill in the remaining fields.

By default the Effective Date for this new name will be the current date. However, you can set that to some other value.

Once you have entered the new name, click Submit.

If the new name does not appear in the Current Names list, click the refresh button.
We have added a Diploma name for Charlotte.

Now we want to change her Preferred name.

**Step 3: Change an Existing Name**

To update a name using **Add/Change a Name**, click the **Name Type** in the Current Names list for the name you want to change (Preferred in our example).

This will fill the Add/Change a Name fields with the old name.

Edit the name, click **Submit**

We’ll see an alternative way of editing a name on the next page.
Alternatively, to change an existing name, click the **Name History** link next to the name you want to update.

To add a new effective dated row—that is, to add a new version of that name type, click the **+** button.

This will bring up a page where you can enter the new name.
The new row lets you set the Effective Date for this new version of the name. Click the Edit Name link to enter the new name.

After entering the new version of the name (Charlotte’s Primary name in this example, click

Click OK again to return to the Names page.

Step 4: Save

On the Names page, click Save