

## **NAME USAGE AT THE COLLEGE OF CHARLESTON**

September 3, 2018

The College of Charleston recognizes, as a community, that many of us use names other than our legal or birth names to identify ourselves. Within our campus systems, the College is now using Preferred First Name to refer to the first name that someone chooses to be known by when they interact with other members of our community, attend class, communicate with the College of Charleston, and receive services from the College that do not require a legal name. The College is now also using Professional Last Name to refer to a last name that a non-student employee, typically a faculty member, goes by professionally and that differs from the employee's Employment Eligibility Name. Professional Last Names are commonly names under which a faculty member originally published and/or earned their academic credentials.

Institutionally, our long-term objective is consistent use of Preferred First Names and Professional Last Names across our campus data systems, anywhere that a legal name is not necessary.

Inappropriate use of the Preferred First Name or Professional Last Name (including but not limited to misrepresentation or avoiding legal obligation) may be cause for denying use of such names. The College of Charleston reserves the right to deny or remove the record and use of any Preferred First Name or Professional Last Name that is deemed inappropriate.

## **Frequently Asked Questions and Answers for Students**

### **Am I required to provide a Preferred First Name?**

No, if you do not provide a Preferred First Name, your Student Legal Name will be used throughout our systems, with the exception of student employment records, where we will use your Employment Eligibility Name. Click [here](#) for descriptions of all College of Charleston name types.

### **I would like to designate, change, or delete my Preferred First Name. What do I need to do?**

As a student, to designate a Preferred First Name, change a previously recorded Preferred First Name, or delete a Preferred First Name, you must submit a Preferred First Name Request form to the Office of the Registrar. The form and additional information are available at <http://registrar.cofc.edu/personal-information-updates/index.php>.

### **Where will my Preferred First Name appear?**

Students' Preferred First Names will now appear in the following places:

- OAKS, the College of Charleston's learning management system (if your Preferred First Name was filed with the Office of the Registrar on or after August 1, 2018);
- Degree Works degree audit system;
- Your professors' course rosters and advisee lists;
- Display name on your Cougars email account;
- College of Charleston online directories; and
- Cougar Cards produced after August 20.

In subsequent project phases, the Preferred First Name will be displayed in other visible on-campus systems. These changes will be announced as they are implemented.

### **Where will I need to use my Student Legal Name?**

As a student, you must continue using your Student Legal Name for federal financial aid and veterans' benefits (through the Office of Financial Assistance and Veterans' Affairs); on your FAFSA; with the Treasurer's Office, including on your College bill and on any refunds; and with the Center for International Education if you are an international student. Additionally, if you are participating in a study abroad trip or any travel sponsored by the College that involves traveling by air or leaving the United States, then on any travel documents, you will need to use your legal name (as recorded on your passport or REAL ID compliant state-issued driver's license).

The Office of the Registrar will use your Student Legal Name on your academic records, including diplomas, transcripts, and all student academic records stored in Internet Native Banner. They will also use your Student Legal Name when reporting to the National Student Clearinghouse. However, in your campus interactions with the Office of the Registrar, they will generally use your Preferred First Name, Last Name, and College-Wide Identification (CWID) number. Occasionally, they may need to request from you the first name and middle initial from your Student Legal Name in order to accurately identify your academic records.

The Office of the Registrar will also use your Student Legal Name on your diploma and on any transcripts that they issue at your request.

If you are applying for fellowships, scholarships, national awards, or jobs outside the College of Charleston and you need your application name to match your transcript name, then you and your references may need to use your Student Legal Name.

Please also see the question below regarding student employment.

### **Can I use my Preferred First Name for everything on campus?**

If your Preferred First Name differs from the first name of your Student Legal Name, please keep in mind that your Student Legal Name will be required by certain offices and on certain documents. In these key offices and occasionally elsewhere on campus, you may be asked to provide identifiers or validate your Student Legal Name for records purposes. In such cases, you may offer your Campus-Wide Identification number (*a.k.a.* "CWID" or "student ID number"). Occasionally, you may also need to indicate that you have both a Preferred First Name and a Student Legal Name in our systems and you may need to provide one or both names if needed by the College employee who is assisting you.

### **Are there guidelines pertaining to my choice of a Preferred First Name?**

Yes, the Preferred First Name may be up to 25 characters and is limited to alpha characters (A-Z and a-z) and a space, apostrophe (') or hyphen (-). Individuals should refrain from using any of the following in their Preferred First Name:

- Symbols, numbers, unusual capitalization, repeating characters or punctuation;
- Characters from multiple languages;
- Titles of any kind, *e.g.* professional or religious titles;
- Offensive or suggestive words of any kind; and
- Pretending to be anything or anyone else.

Inappropriate use of the Preferred First Name (including but not limited to misrepresentation or avoiding legal obligation) may be cause for denying use of a Preferred First Name. The College of Charleston reserves the right to deny or remove the record and use of any Preferred First Name that is deemed inappropriate.

### **Are there restrictions on when I can record or change a Preferred First Name?**

There are no restrictions on when you can record or change a Preferred First Name. However, if you record or change a Preferred First Name during the semester, we recommend that you inform your professors of the change to facilitate their maintenance of your grade, attendance, and participation records in your courses. Additionally, because name changes propagate through our systems over a period of days, we recommend that you not change your recorded names frequently.

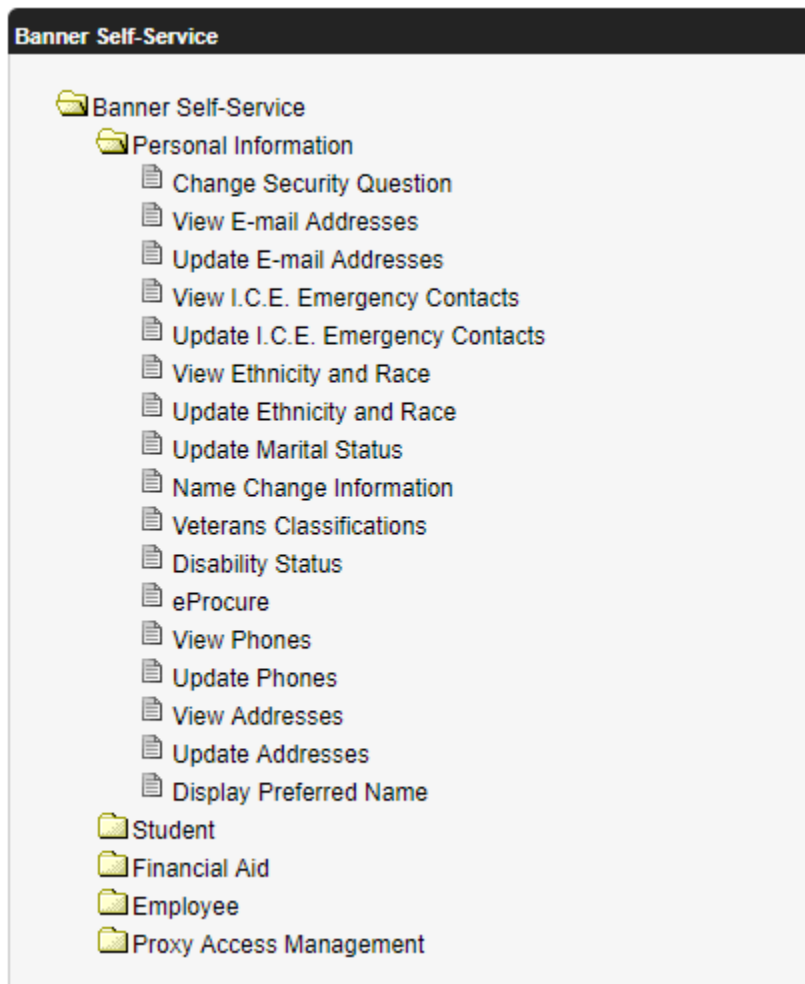
### **What if I am using a recorded Preferred First Name and I want my middle name or middle initial to appear in my campus public name, as in "Smith, Jamie P." or "Smith, Jamie Patricia"?**

In this case, you should ask that your preferred first name and middle initial or your preferred first name and middle name appear in the Preferred First Name field in Banner. You can make that request by

filing a Preferred First Name Request form with the Office of the Registrar. In this case, your middle name or middle initial will appear everywhere that your Preferred First Name is used, even if your last name is not being displayed.

**If I am not sure what Preferred First Name the College has on record for me, where can I check?**

You can see your Preferred First Name in the places outlined above and in Self-Service Banner, which is accessible from MyCharleston (my.cofc.edu). For students, the Self-Service Banner channel is in the right-hand column of the Academic Services tab in MyCharleston and looks like this:



**If I have filed a Preferred First Name Request form, how long will it take for my chosen name to appear in the College systems listed above?**

It may take 48-72 hours during normal business days for Preferred First Name Request forms filed in the Office of the Registrar to be fully processed, as some updates are sequential, manual, or rely on synchronization processes that run overnight.

**My Preferred First Name appears everywhere on the list above except in OAKS, the College's learning management system. What should I do?**

Until further notice, the provision of Preferred First Names to OAKS is a manual process.

- If you completed and submitted your Preferred First Name Request form to the Office of the Registrar on or after August 1, 2018, then they will pass your Preferred First Name to our Teaching, Learning, and Technology team to be recorded in your OAKS account. Please allow 48-72 hours during normal business days for your request to be processed. If your Preferred First Name has appeared in other locations but has still not appeared in OAKS at that time, please contact Laura Plotts in Teaching, Learning, and Technology at [PlottsL@cofc.edu](mailto:PlottsL@cofc.edu).
- If you provided your Preferred First Name to the College prior to August 1, 2018, through your College of Charleston application process, for instance, then it will not automatically be passed to Teaching, Learning, and Technology for manual entry into OAKS. However, you may submit a Preferred First Name Request form to the Office of the Registrar. Once the form is fully processed, your Preferred First Name will be passed to Teaching, Learning, and Technology to be recorded in OAKS.

**May I have a Preferred First Name that displays only in OAKS, the College's learning management system?**

No, students may not have a Preferred First Name that displays only in OAKS and not in other locations. In order for instructional faculty to accurately identify students for grading purposes, the College is allowing use of Preferred First Names in OAKS only if the Preferred First Name is recorded in Banner, the College's enterprise system. Students wanting to record a Preferred First Name can do so by completing the Preferred First Name Request form available through the Office of the Registrar at <http://registrar.cofc.edu/personal-information-updates/index.php>.

Questions about this policy may be directed to Deanna M. Caveny, Associate Provost for Faculty Affairs, in the Office of the Provost at [cavenyd@cofc.edu](mailto:cavenyd@cofc.edu).

**I have filed a Preferred First Name Request form in the Office of the Registrar and everything has worked, except that my email address has not changed. Can I get my email address changed?**

Your Preferred First Name will be used in your display name for your College email account, but based on current College of Charleston Information Technology procedures, your login and actual email address will not change. Questions about this policy may be directed to [helpdesk@cofc.edu](mailto:helpdesk@cofc.edu).

**My Preferred First Name appears in Self-Service Banner and DegreeWorks, but does not yet appear in the online directory and my student email account. What should I do?**

The online directory and display names in student email accounts rely on a regular synchronization process. Name changes will not appear in the online directory and as display names in student email accounts until a synchronization has taken place.

**What is the best approach to looking up classmates, professors, and staff members of the College of Charleston via email or the online directory?**

The look-up features in our email systems and online directory will rely on the name that is being displayed for the individual. For instance, if you have a Preferred First Name recorded in Banner, then that name will be the one displaying in your Cougars email account and in our online directory. Others trying to contact you should search for you in our directories using that name (or using only your last name).

**I have given proxy access to my parent(s) or guardian(s). Will they be able to see my Preferred First Name in MyCharleston?**

Users with proxy access will be able to see both the Preferred First Name and the Student Legal Name.

**Which name will be used on my official and unofficial transcripts provided by the Office of the Registrar?**

The College uses your Student Legal Name on official and unofficial transcripts provided by the Office of the Registrar.

**Which first name will be used on my unofficial degree audits printed from DegreeWorks?**

Unofficial degree audits printed from DegreeWorks will bear your Preferred First Name, since it is the name that College of Charleston faculty and staff will be using when providing academic advising to you.

**What name will be used on my diploma? What do I need to do in order to have my diploma reflect the name that I am using?**

Your diploma will bear your Student Legal Name. If you have legally changed your name, you may file a Student Legal Name Change form with the Office of the Registrar, and then any diploma ordered after your Student Legal Name Change will bear your new legal name. For additional information, please see below.

**How do I change my Student Legal Name?**

To change your legal name with the College of Charleston, please complete a Student Legal Name Change Request form, which can be found at <http://registrar.cofc.edu/personal-information-updates/index.php>.

**Who will have access to see both my Preferred First Name and my Student Legal Name?**

College employees working in the Office of the Registrar, Office of Financial Assistance and Veterans' Affairs, Treasurer's Office, Human Resources, the Career Center, the Academic Advising and Planning Center, Center for Academic Performance and Persistence, the Transfer Center, and the Center for International Education will be able to see both your Preferred First Name and your Student Legal Name. Both names will also appear on print lists used for dorm access when Cougar Card readers are down. Public Safety officers and College employees who need access to Internet Native Banner in order to carry out their jobs will also be able to see both of your names, and if you are a student employee, your campus supervisor will be able to see both of your names.

**I got my Cougar Card prior to August 20, 2018 or prior to recording my Preferred First Name. How do I get a new Cougar Card with my Preferred First Name?**

Once you have completed a Preferred First Name Request form in the Office of the Registrar and that form has been fully processed, you may apply for a new Cougar Card in the Card Services Office at:

162-A Calhoun Street  
Berry Residence Hall, 1<sup>st</sup> floor  
Enter from Calhoun Street

You are not required to get a new card. However, if your name and appearance have changed substantially since your last Cougar Card was issued, you are encouraged to get a new card. With a name change, there will be no charge for updated student cards when a current Cougar Card is exchanged for the new card.

Your Cougar Card photo also appears on electronic copies of your professors' course rosters. If your professor is using a print copy, it may bear your old or new card photo, depending on when it was printed.

**Who should I contact if I have questions about use of a Preferred First Name on campus?**

Questions from students may be directed to Deanna M. Caveny, Associate Provost for Faculty Affairs, or Mary C. Bergstrom, University Registrar and Assistant Provost.

## **Frequently Asked Questions and Answers for Employees**

### **Am I required to provide a Preferred First Name?**

No, if you do not provide a Preferred First Name, your Employment Eligibility Name will be used throughout our systems. See [here](#) for descriptions of College of Charleston name types.

### **I would like to designate, change, or delete my Preferred First Name or Professional Last Name. What do I need to do?**

If you are a new employee, to designate a Preferred First Name or Professional Last Name, you should include it on your Personal Data Sheet. If you are an existing employee, to designate a Preferred First Name or Professional Last Name, to change a previously recorded name, or to delete a Preferred First Name or Professional Last Name, you must submit a Name/Address Change form in our Office of Human Resources. Both of these forms are available at <http://hr.cofc.edu/forms/index.php>, under the Personal Data heading. Student employees should file any name change requests with the Office of the Registrar instead, using the name change processes outlined in the student FAQ section and links above.

### **I am an employee who completes timesheets. What name will appear on my timesheet?**

Your Employment Eligibility Name will appear on your timesheets. This should be the same name as on your I-9 form and legal identity and work eligibility documents.

### **I am an employee. What name will appear on my direct deposit transactions?**

Your Employment Eligibility Name will appear on your direct deposit transactions.

### **I am an employee. What name will appear on my W-2 form?**

Your Employment Eligibility Name will appear on your W-2. This should be the same name as on your I-9 form and associated identity and work eligibility documents. For many student employees, this will be the same as your Student Legal Name reflected on your academic records.

### **I am an employee. If I record a Preferred First Name with Human Resources, where will that appear?**

If you record a Preferred First Name with Human Resources, it will appear in the following locations:

- OAKS, the College of Charleston's learning management system;
- Display name on your Cougars email account;
- College of Charleston online directories; and
- Cougar Cards produced after August 20.

In subsequent project phases, the Preferred First Name will be displayed in other visible campus-facing systems. Details will be provided in subsequent phases of the project.

### **I am an employee and am not a student. If I record a Professional Last Name with Human Resources, where will that appear?**

If you record a Professional Last Name with Human Resources, it will appear in most locations in our campus systems, including but not limited to:

- OAKS, the College of Charleston's learning management system;



- Display name on your Cougars email account;
- College of Charleston online directories; and
- your Cougar Card, if produced after the name is recorded in Banner.

Your Professional Last Name will generally not appear in fields associated with payroll and taxes, where your Employment Eligibility Name will appear instead.

**What if I am using a recorded Preferred First Name and I want my middle name or middle initial to appear in my campus public name, as in “Smith, Jamie P.” or “Smith, Jamie Patricia”?**

In this case, you should ask that your preferred first name and middle initial or your preferred first name and middle name appear in the Preferred First Name field in Banner. You can make that request by filing a Name/Address Change form with the Office of Human Resources. In this case, your middle name or middle initial will appear everywhere that your Preferred First Name is used, even if your last name is not being displayed.

**I have recorded or changed my Preferred First Name or Professional Last Name with Human Resources. May I get a new Cougar Card?**

Yes, if your name has changed, you may get a new card in Cougar Card Services. Employees are not subject to a card fee; however, a current card should be exchanged for the new card if possible.

**Can I use my Preferred First Name and Professional Last Name for everything on campus?**

If your Preferred First Name or Professional Last Name differs from parts of your Employment Eligibility Name, please keep in mind that your Employment Eligibility Name will be required by some offices and on certain documents, including all work eligibility documents. In these key offices and occasionally elsewhere on campus, you may be asked to provide identifiers or validate your Employment Eligibility Name for records purposes. Occasionally, you may also need to provide your Campus Wide Identification number (a.k.a. “CWID” or “employee ID number”) or will need to indicate that you have multiple names recorded in our systems. In those cases, you may need to provide one or more of your names if needed by the College employee who is assisting you.

**Are there guidelines pertaining to my choice of a Preferred First Name and Professional Last Name?**

Yes, the Preferred First Name and Professional Last Name may be up to 25 characters and are limited to alpha characters (A-Z and a-z) and a space, apostrophe (') or hyphen (-). Individuals should refrain from using any of the following in their Preferred First Name or Professional Last Name:

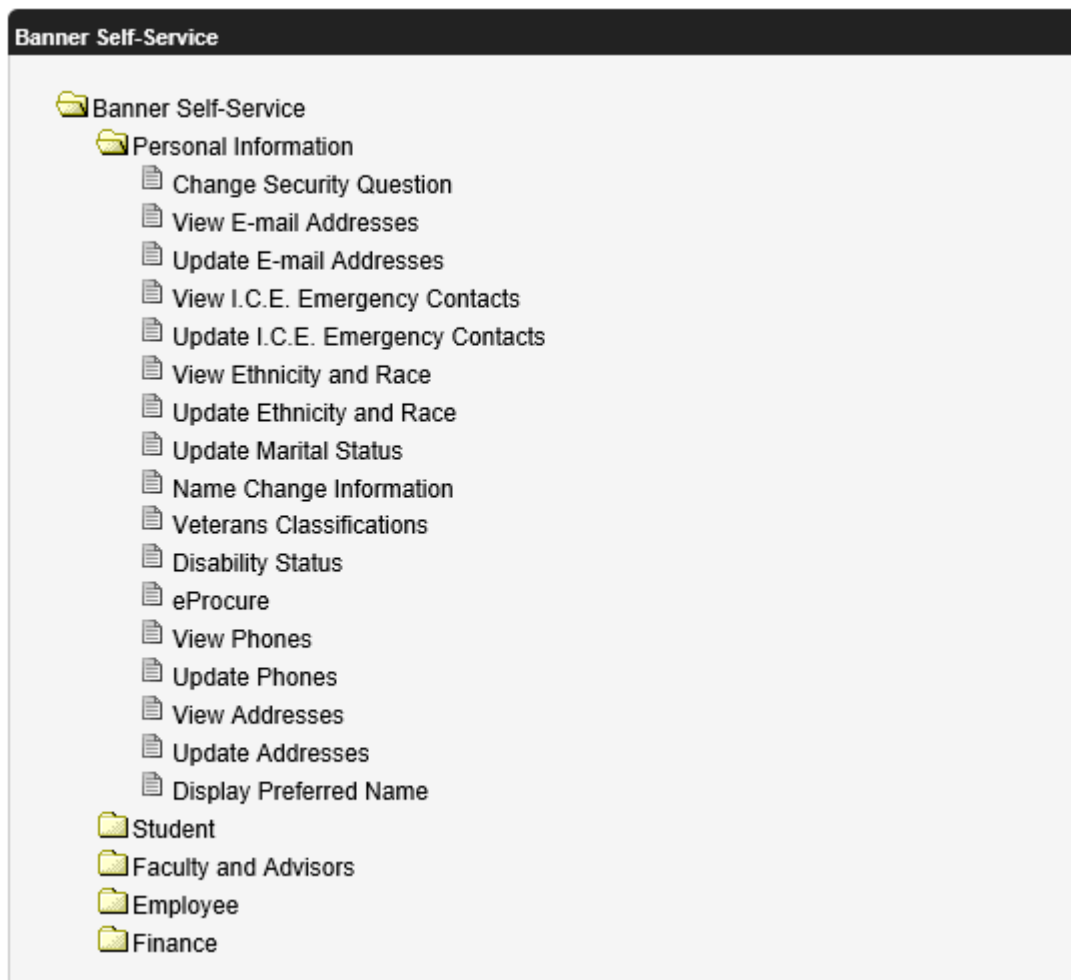
- Symbols, numbers, unusual capitalization, repeating characters or punctuation;
- Characters from multiple languages;
- Titles of any kind, *e.g.* professional or religious titles;
- Offensive or suggestive words of any kind; and
- Pretending to be anything or anyone else.

Inappropriate use of the Preferred First Name or Professional Last Name (including but not limited to misrepresentation or avoiding legal obligation) may be cause for denying use of a Preferred First Name or Professional Last Name. The College of Charleston reserves the right to deny or remove the record and use of any Preferred First Name or Professional Last Name that is deemed inappropriate.

Additionally, the Professional Last Name should generally be a prior legal name or some combination of current and/or prior legal names.

**If I am not sure what Preferred First Name the College has on record for me, where can I check?**

You can see your Preferred First Name in the places outlined above and in Self-Service Banner, which is accessible from MyCharleston (my.cofc.edu). For employees, the Self-Service Banner channel is at the top left-hand side of the Employee tab in MyCharleston and looks like this:



**My Preferred First Name appears everywhere on the list above except in OAKS, the College’s learning management system. What should I do?**

Until further notice, the provision of Preferred First Names to OAKS is a manual process.

- If you completed and submitted a Personal Data Sheet or Name/Address Change form in the Office of Human Resources on or after August 20, 2018, then they will pass your Preferred First Name to our Teaching, Learning, and Technology team to be recorded in your OAKS account. Please allow 48-72 hours during normal business days for that process. If your Preferred First

Name has still not appeared in OAKS at that time, please contact Laura Plotts in Teaching, Learning, and Technology at PlottsL@cofc.edu.

**I have filed a Name/Address Change form in the Office of the Human Resources and my newly recorded name has appeared appropriately everywhere, except that my email address has not changed.**

Your Preferred First Name and Professional Last Name will be used in your display name for your College email, but based on current College of Charleston Information Technology procedures, your login and actual email address will not change. Questions about this policy may be directed to helpdesk@cofc.edu.

**My Preferred First Name or Professional Last Name appears in some locations, but does not yet appear in the online directory and in the display name for my College email account. What should I do?**

The online directory and display names in employee email accounts rely on a regular synchronization process. Name changes will not appear in the online directory and as display names in student email accounts until a synchronization has taken place.

**What is the best approach to looking up students and colleagues via the College's email systems or online directory?**

The look-up features in our email systems and online directory will rely on the name that is being displayed for the individual. For instance, if you have a Preferred First Name recorded in Banner, then that name will be the one displaying in your Cougars email account and in our online directory. Others trying to contact you should search for you in our directories using that name (or using only your last name). Additionally, professors are able to contact students via tools in OAKS.

**Who should I contact if I have questions about use of a Preferred First Name on campus?**

Questions from employees may be directed to Deanna M. Caveny, Office of the Provost, at cavenyd@cofc.edu.

**Additional FAQ for Employees who Frequently Work with Students, Including All Faculty**

**Where will my students' Preferred First Names appear?**

Students' Preferred First Names will appear in OAKS, in OAKS-housed course rosters, in Self-Service Banner on your course rosters and advisees lists, in DegreeWorks, in the online campus directory, and in the display name in their email.

**Which name should I use on Addition to the Roster, Deletion from the Roster, and Change of Grade forms?**

For students who have a Banner-recorded Preferred First Name, forms from the Office of the Registrar that bear student names will use the Preferred First Name and the Last Name from the Student Legal Name. For students who have no recorded Preferred First Name, forms from the Office of the Registrar will use the First Name, Middle Initial, and Last Name from the Student Legal Name. In both cases, these are the same names that will appear on your rosters.

**What happens when a student records a Preferred First Name or changes their Preferred First Name during a semester?**

That student's Preferred First Name will then appear in the places listed above. That process may take 48-72 hours during normal business days. Additionally, if that student has a common last name and there is another student on your roster with that same last name, then they may appear on your rosters (in Self-Service Banner and in OAKS) in a different order than they had originally appeared.

**What if a student wants me to use a Preferred First Name for them in class but that first name is not appearing on my rosters?**

For orderly course and academic records management, students should record with the Office of the Registrar any Preferred First Name that they are actively using. Please encourage your students to do so. Questions may be directed to Deanna M. Caveny, Associate Provost for Faculty Affairs, Office of the Provost at [cavenyd@cofc.edu](mailto:cavenyd@cofc.edu); our Gender and Sexuality Equity Center; or our Women's and Gender Studies Program. Additionally, in the interim, please work with the student regarding the name and pronouns that you will use for them in class.

**What if I have additional questions about student use of a Preferred First Name on campus?**

Many of your questions may be answered via the FAQ for students, which appears above. Questions may also be directed to Deanna M. Caveny, Associate Provost for Faculty Affairs, Office of the Provost, at [cavenyd@cofc.edu](mailto:cavenyd@cofc.edu).