

This document contains steps on how to add/change and delete a student's preferred name. This can be done by either the student or by certain staff members. The only change a student requires staff assistance with is deleting their preferred name.

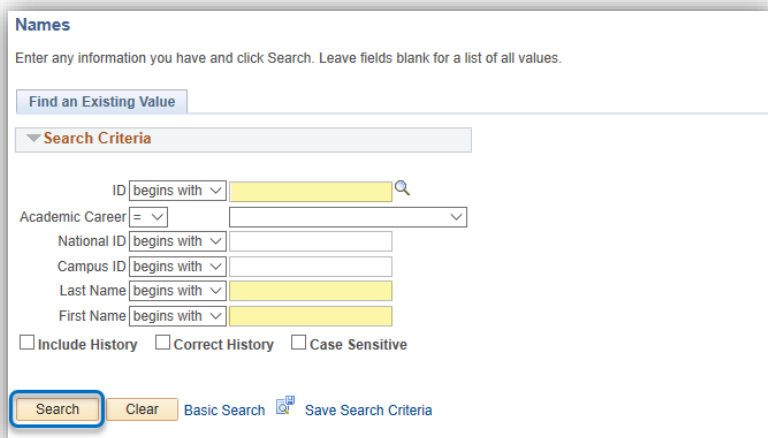
1. Students are required to add/change their preferred name via their Student Centre. However, the student cannot delete their preferred name without staff assistance.
2. Staff can add/change and delete a student's preferred name via PeopleSoft (PS) Campus Solutions (CS). The student's preferred name can be managed from either the **Names** link on the **Biographical Details** page or by going directly to the **Names** page.

Once the preferred name is added/changed in CS, it will be displayed in Zoom, Microsoft Teams, Office 365 applications, Student Centre, email/calendar, computer labs, class rosters and any corresponding systems that PS feeds the preferred name information to. However, the preferred name will not be fed to and displayed in D2L. For updating a student's D2L display name, please have the student contact UService at (403) 210-9300 or by email at it@ucalgary.ca.

Zoom automatically defaults the display name to the student's preferred name in PS Campus Solutions, if entered at the time of admission, otherwise the primary (legal name) is displayed in Zoom.

ADD/CHANGE A PREFERRED NAME

1. Navigate to **Main Menu > Campus Community > Personal Information (Student) > Biographical (Student) > Names**
2. Enter any search criteria you may have, e.g. Empl ID, Last Name or First Name to find the individual. Click the **Search** button.



Names

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

[Find an Existing Value](#)

▼ **Search Criteria**

ID begins with [] []

Academic Career [] []

National ID begins with [] []

Campus ID begins with [] []

Last Name begins with [] []

First Name begins with [] []

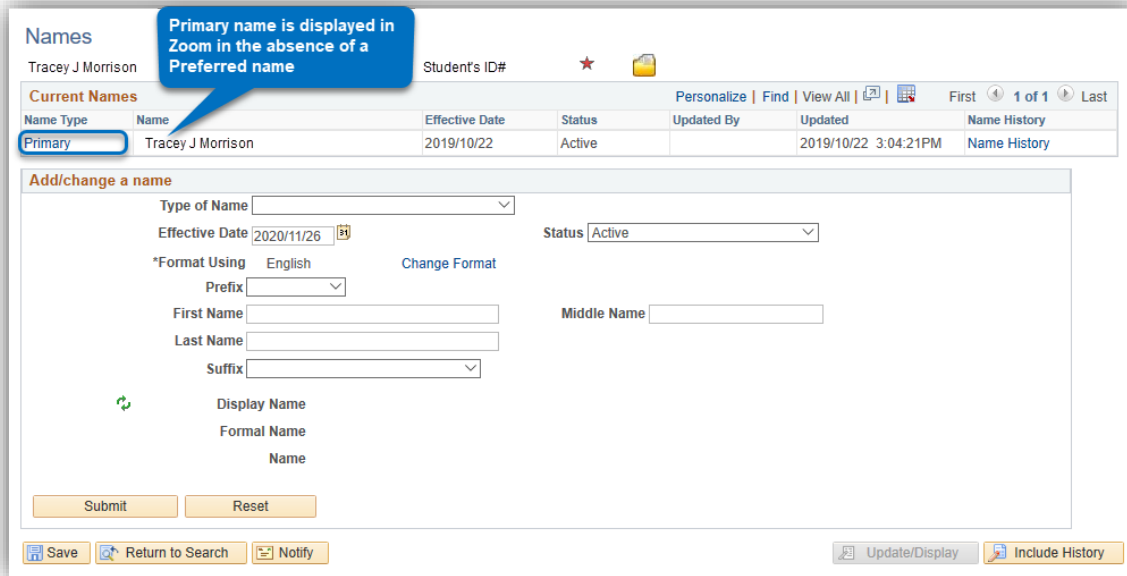
Include History Correct History Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Add/Change Preferred Names Visible in Zoom

SA – Student Administration Basics

- The **Names** page displays existing information, including a history of names for the student. For this example, the Primary (Legal) name displays. This would be the name displayed in Zoom.



Names

Tracey J Morrison Student's ID#

Current Names

Name Type	Name	Effective Date	Status	Updated By	Updated	Name History
Primary	Tracey J Morrison	2019/10/22	Active		2019/10/22 3:04:21PM	Name History

Add/change a name

Type of Name

Effective Date 2020/11/26

Status Active

*Format Using English Change Format

Prefix

First Name

Last Name

Middle Name

Suffix

Display Name

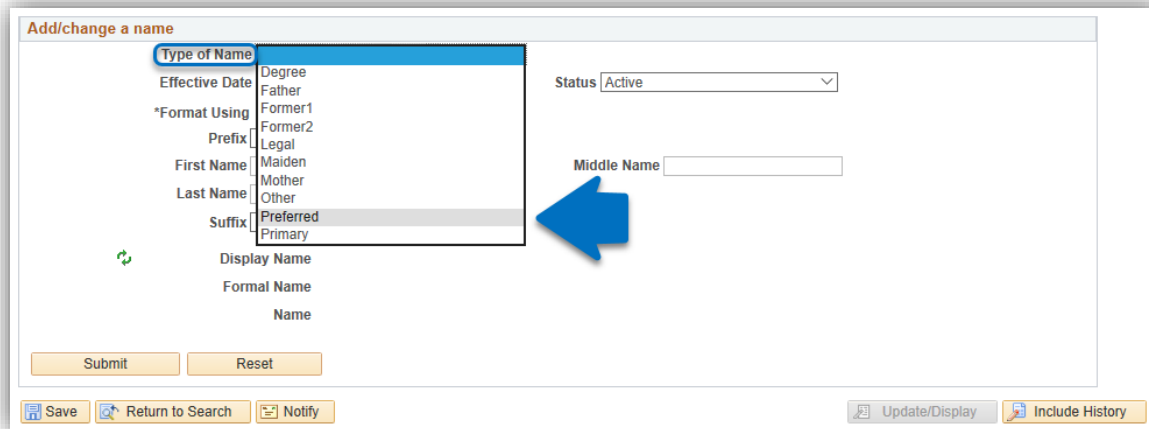
Formal Name

Name

Submit Reset

Save Return to Search Notify Update/Display Include History

- To add a preferred name, click on the **Type of Name** dropdown list. From the list, select **Preferred**.



Add/change a name

Type of Name

Effective Date

Status Active

*Format Using

Prefix

First Name

Last Name

Middle Name

Suffix

Display Name

Formal Name

Name

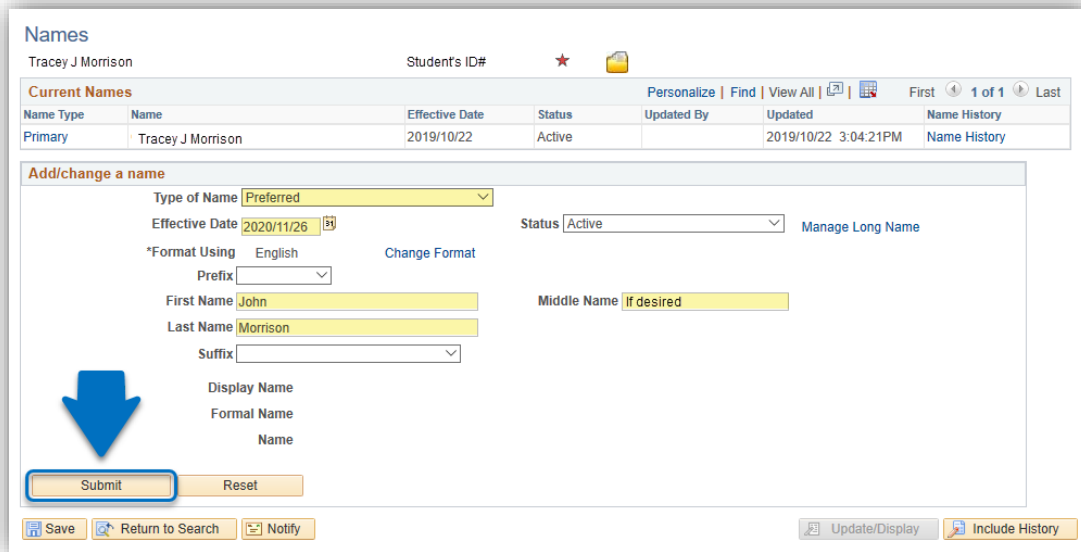
Submit Reset

Save Return to Search Notify Update/Display Include History

Adding/changing a preferred name is used when the student has a preferred name they wish to have displayed in Zoom; to be referred to in class (e.g. Class Roster) or on campus (e.g. Student Career Centre). The Primary name represents the Legal name as the main category for a student name. Please avoid using "Other" for type of name.

- Enter the preferred First Name, Middle Name (if desired) and the Last Name. Ensure the **Effective Date** is set to either the day you are making the change or future dated for when the change takes place. Click the **Submit** button.

NOTE: Any erroneous or derogatory requests for name changes will be subject to non-academic misconduct.



Names
Tracey J Morrison Student's ID# ★ 📁

Current Names Personalize | Find | View All | 📄 | 📅 First 1 of 1 Last

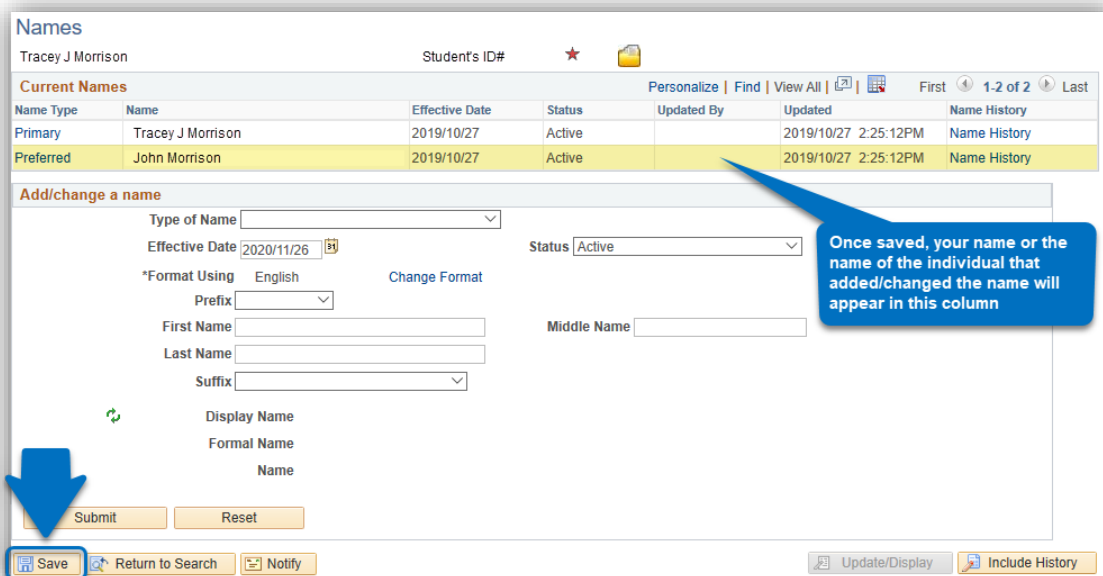
Name Type	Name	Effective Date	Status	Updated By	Updated	Name History
Primary	Tracey J Morrison	2019/10/22	Active		2019/10/22 3:04:21PM	Name History

Add/change a name

Type of Name: Preferred
 Effective Date: 2020/11/26
 Status: Active Manage Long Name
 *Format Using: English Change Format
 Prefix:
 First Name: John Middle Name: if desired
 Last Name: Morrison
 Suffix:
 Display Name:
 Formal Name:
 Name:
 Submit Reset

Save Return to Search Notify Update/Display Include History

- The **Current Names** table will display all names that have been added/changed (e.g. John Morrison). When satisfied with the information in the table, click the **Save** button.



Names
Tracey J Morrison Student's ID# ★ 📁

Current Names Personalize | Find | View All | 📄 | 📅 First 1-2 of 2 Last

Name Type	Name	Effective Date	Status	Updated By	Updated	Name History
Primary	Tracey J Morrison	2019/10/27	Active		2019/10/27 2:25:12PM	Name History
Preferred	John Morrison	2019/10/27	Active		2019/10/27 2:25:12PM	Name History

Add/change a name

Type of Name:
 Effective Date: 2020/11/26
 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

Once saved, your name or the name of the individual that added/changed the name will appear in this column

Add/Change Preferred Names Visible in Zoom

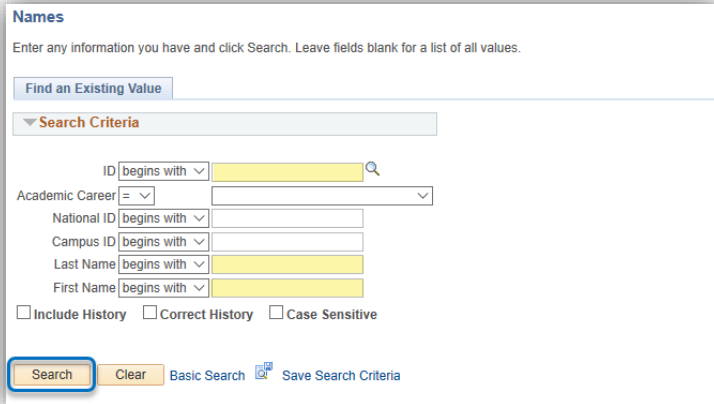
SA – Student Administration Basics

DELETE A PREFERRED NAME

Deleting a preferred name from the **Names** page requires the use of the **Correct History** button. Depending on your level of access, you may or may not be able to delete a preferred name from a student's name history. The **Correct History** function is only available in the **Names** component under Biographical (Student).

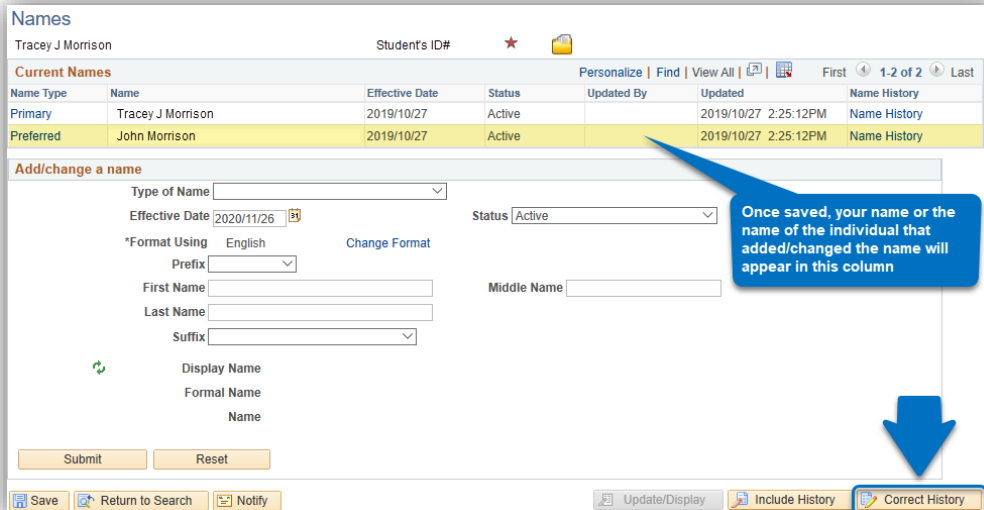
Students may request their preferred name be deleted. This feature is not available to students in their Student Centre. They require staff assistance with this request.

1. Navigate to **Main Menu > Campus Community > Personal Information (Student) > Biographical (Student) > Names**
2. Enter any search criteria you may have, e.g. Empl ID, Last Name or First Name to find the individual. Click on **Search**.




The screenshot shows the 'Names' search page. It includes a search criteria section with dropdown menus for ID, Academic Career, National ID, Campus ID, Last Name, and First Name, each with a 'begins with' filter. There are also checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. A 'Search' button is highlighted with a blue box.

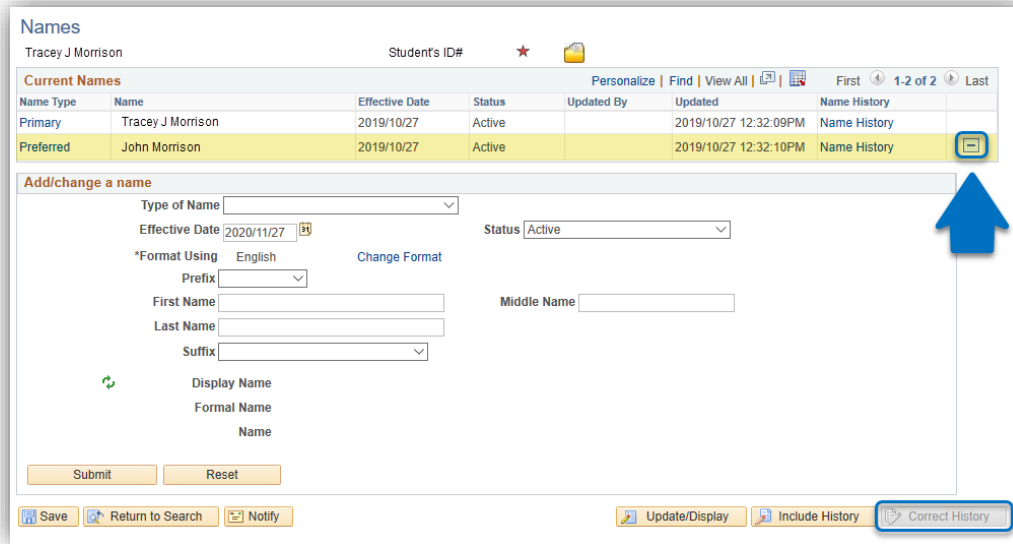
3. On the **Names** page, the preferred name will be displayed in the **Current Names** table (e.g. John Morrison). In order to delete this preferred name, click **Correct History**.






The screenshot shows the 'Names' page for a student named Tracey J Morrison. It displays a table of 'Current Names' with columns for Name Type, Name, Effective Date, Status, Updated By, and Updated. The 'Preferred' name 'John Morrison' is highlighted. Below the table is the 'Add/change a name' form, which includes fields for Type of Name, Effective Date, Status, Prefix, First Name, Last Name, Middle Name, and Suffix. A blue callout box points to the 'Name History' column in the table, stating: 'Once saved, your name or the name of the individual that added/changed the name will appear in this column'. A blue arrow points to the 'Correct History' button at the bottom right of the form.


Name Type	Name	Effective Date	Status	Updated By	Updated	Name History
Primary	Tracey J Morrison	2019/10/27	Active		2019/10/27 2:25:12PM	Name History
Preferred	John Morrison	2019/10/27	Active		2019/10/27 2:25:12PM	Name History

- After clicking Correct History, it triggers the correction mode and the Correct History button appears greyed-out or inactive. A minus sign  displays at the end of the preferred name line. Click the [minus sign](#) to delete the preferred name.




Names
Tracey J Morrison Student's ID# ★ 

Personalize | Find | View All |  |  First 1-2 of 2 Last

Name Type	Name	Effective Date	Status	Updated By	Updated	Name History
Primary	Tracey J Morrison	2019/10/27	Active		2019/10/27 12:32:09PM	Name History
Preferred	John Morrison	2019/10/27	Active		2019/10/27 12:32:10PM	Name History 

Add/change a name

Type of Name

Effective Date  Status


*Format Using English [Change Format](#)

Prefix

First Name Middle Name

Last Name

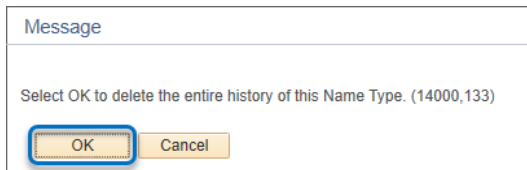
Suffix

 Display Name

Formal Name

Name

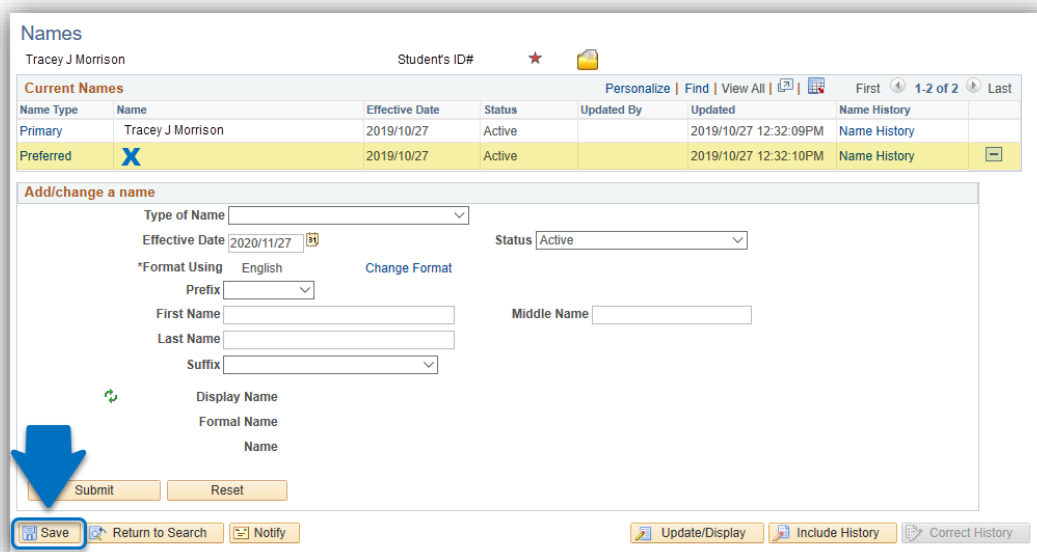
- The following message will display. Click on **OK** to accept the change.






Message


Select OK to delete the entire history of this Name Type. (14000,133)

- Note the preferred name has been deleted from the **Current Names** table. Click on [Save](#).




Names
Tracey J Morrison Student's ID# ★ 

Personalize | Find | View All |  |  First 1-2 of 2 Last

Name Type	Name	Effective Date	Status	Updated By	Updated	Name History
Primary	Tracey J Morrison	2019/10/27	Active		2019/10/27 12:32:09PM	Name History
Preferred	X	2019/10/27	Active		2019/10/27 12:32:10PM	Name History 

Add/change a name

Type of Name

Effective Date  Status


*Format Using English [Change Format](#)

Prefix

First Name Middle Name

Last Name

Suffix

 Display Name

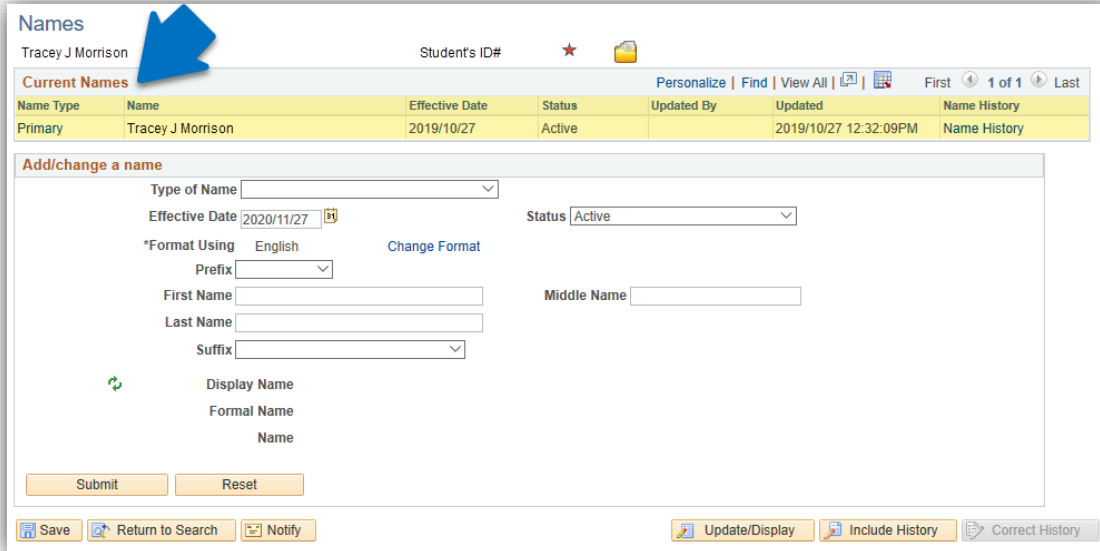
Formal Name

Name

Add/Change Preferred Names Visible in Zoom

SA – Student Administration Basics

- The Current Names table will display the Primary name and/or any other names if entered.



Names
Tracey J Morrison Student's ID# ★

Current Names Personalize | Find | View All | First 1 of 1 Last

Name Type	Name	Effective Date	Status	Updated By	Updated	Name History
Primary	Tracey J Morrison	2019/10/27	Active		2019/10/27 12:32:09PM	Name History

Add/change a name

Type of Name

Effective Date 2020/11/27 Status Active

*Format Using English [Change Format](#)

Prefix

First Name Middle Name

Last Name

Suffix

Display Name

Formal Name

Name

End of Procedure