

Policy Title: Preferred First Name	
Responsible University Office:	
University Office:	Student Affairs
Office Website URL:	http://vpsa.uoregon.edu/
Policy Owner:	Robin Holmes
Email:	vpsa@uoregon.edu
Phone:	(541)346-1137
DATE: October 31, 2013	
Policy Concept Form: The policy concept form was approved by the Senior Vice President and Provost on the following date:	
NOTE: Policy development may not proceed until the policy concept has been approved.	
Preamble:	
<p>Currently, the UO allows for use of a preferred name, but additionally lists the legal name in the Find People directory, on class roll sheets, etc. This is a concern for transgender students who may still have a legal first name that confers one gender while having a preferred first name that may confer a different gender (e.g. Legally 'John' – preferred "Jennifer"). When legal names are still listed on class roll sheets and in the public Find People directory, it causes repeated and undue 'outing' every time a student starts a new class or anyone looks them up in the directory. The proposed policy takes into account the UO's legal requirements and would not interfere with records where legal names are required (payroll and other official documents), allows the UO to deny requested first names when appropriate, but would allow more flexibility to list students with their preferred name only whenever possible.</p>	
Reason for Policy: See Preamble.	
Definitions:	

Policy Statement:

The university recognizes that many persons use first names other than their legal names to identify themselves. As long as the use of this preferred first name is not for an improper purpose, is not restricted by state or federal law and does not have an impact on the ability of the university to comply with state or federal law, the university will use "preferred first name" when possible in the course of university activities.

Therefore, it is the policy of the university that any current or former student or employee may choose a preferred first name in addition to that person's legal name listed within the university's information systems. The person's preferred first name shall be used in university communications and reporting except where the use of the legal name is required for university purposes. (Please refer to FAQ for further details)

The university reserves the right to remove a preferred name if it is used improperly, including but not limited to , avoiding legal obligations or misrepresentation.

What Is a Preferred First Name?

A current or former student or employee may prefer to use a first name that is different from their legal name. Also, they may want to have this first name appear instead of their legal first name in the online directory and in other university records and documents. The university allows them to do this by setting a preferred first name. They should set the preferred first name in DuckWeb and it will then appear in the online directory and other records, such as Blackboard and the class roster. Some records, such as paychecks and financial aid documents, that require use of a legal name, will not include the preferred first name.

Setting a Preferred First Name

Use Duckweb to set the preferred first name online. All individuals may do this under the personal information tab. If Duckweb is unavailable, a current or former employee may contact the payroll office in order to change preferred name and a current or former student should contact the registrar's office.

Display of the Preferred First Name

Once established, preferred name will be used across university systems, where possible. The legal names will continue to be used for certain university records, documents, and business process where use of legal name is required by law or university policy.

Exclusions and Special Situations:**Procedures:****Forms/Instructions/Regulations:**

Who is Governed by this Policy:

(Please mark all that apply by double clicking on box)

- Faculty
- Officers of Administration
- Students
- Staff
- Other: _____

Who Should Know this Policy:

Any University of Oregon current or former student or employee.

Cross Reference to Related Policies:

Related Documents:

Frequently Asked Questions:

1. **Can any member of the UO community set a preferred first name?**
Individuals who have access to Duckweb can set preferred first names.
2. **Can I set my preferred first name to whatever I want?**
Yes, but the university reserves the right to remove a preferred first name if it is used for an improper purpose (such as for misrepresentation).
3. **Can I use my preferred first name for everything at the university?**
No. Your legal name will continue to be used in business processes that require use of the legal name, such as for payroll records and student transcripts.
4. **What do I need to know about my ID card?**
If you choose to utilize the preferred first name at the UO your UO ID card can no longer be used as proof of legal identity. This would impact its use as a form of ID for employment verification or other uses for those who do not have other forms of picture ID.
5. **How do I correct or change my legal name for university systems?**
 - **Students** can file a name change form through the Registrar's website or by email (registrar@uoregon.edu) or by phone (541 346-2935)
 - **Employees**, including student employees can file a legal name change by completing the Address/Personal Data Form available on the Human Resources

Revision/Development History:

Organizational Category:

(Please mark **only** one by double clicking on box)

- | | |
|--|---|
| <input type="checkbox"/> Administration and Governance | <input type="checkbox"/> Finance and Business Affairs |
| <input type="checkbox"/> Academic and Curricular | <input type="checkbox"/> University Relations |
| <input type="checkbox"/> Human Resources | <input type="checkbox"/> Health and Safety |
| <input type="checkbox"/> Facilities | <input type="checkbox"/> Research |
| <input checked="" type="checkbox"/> Students | <input type="checkbox"/> Information Technology |
| | <input type="checkbox"/> General |

POLICY CONSULTATION AND REVIEW

Consultation and review by the following individuals or groups:

Robin Holmes

Date: *11/1/2013*

Robin Holmes, Vice President for Student Affairs

Randy Geller (approved via email)

Date: 10-18-13

General Counsel

Scott Brown

Date: *10-31-13*

Senior Vice President and Provost

Margie Paris approved via Email

Date: *10-31-13*

University of Oregon Senate President

Date:

Click here to add Name or Group

APPROVED BY:

President or Designee

Michel Gottfredson
Signature

11-12-13

Date

POLICY EFFECTIVE DATE:

11-12-13

ASSIGNED POLICY NUMBER:

05.00.05 kw

Kathy Warden

From: Margie Paris <mparis@uoregon.edu>
Sent: Thursday, October 31, 2013 8:53 AM
To: Kathy Warden
Cc: Lisa Mick Shimizu
Subject: Policy proposals

Dear Kathy,

The Senate Executive Committee reviewed the three policy proposals that you sent. It decided that two of them do not need full Senate review. Those are (1) the Professional Development and Training Policy; and (2) the Preferred First Names Policy. With respect to the latter, one of our members suggested the following grammatical changes, which are important for clarity:

Policy Statement :

The university recognizes that many persons use first names other than their legal names to identify themselves. As long as the use of this preferred first name is not for an improper purpose, is **not** restricted by state or federal law, or **and** has **does not have** an impact on the ability of the university to comply with state or federal law, the university will use "preferred first name" when possible in the course of university activities.

Changes made KW

The Executive would like the full Senate to review the third proposal -- the Environmental Policy. Would you like me to schedule that review for the Senate's November 13th meeting? If so, please forward to me a copy of a red-lined version, so that the Senate can see both the old language and the proposed changes. Additionally, it would be helpful if you would identify for me the appropriate person(s) involved in the policy proposal, so that I can invite that person(s) to come to the Senate meeting in order to explain the changes and hear any feedback that the Senate offers.

As a general rule in the future, it would be very helpful if you were to forward red-lined versions of policy proposals to me for presentation to the Senate Executive Committee.

Many thanks, Kathy.

Best,

Margie

Professor Margie Paris
President, University of Oregon Senate (2013-14)

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Kathy Warden

From: Chicora Martin
Sent: Friday, October 18, 2013 11:38 AM
To: Kathy Warden
Cc: Shannon A Rose; Robin Holmes
Subject: FW: Preferred name feedback
Attachments: Preferred_First_Name_Draft 10_18_13.docx

As you can see from the email below- Randy has reviewed and approved the last few changes. An updated version is attached here. I believe this can now go to all the folks and be ready for the October 30th meeting. I will let the committee know.

Chicora

From: Randy Geller
Sent: Friday, October 18, 2013 11:08 AM
To: Chicora Martin
Subject: Re: Preferred name feedback

I am fine with the revised policy.

On Oct 18, 2013, at 10:59 AM, "Chicora Martin" <chicora@uoregon.edu> wrote:

Change 1

Current Text

However, use of the preferred first name for an improper purpose is cause for denying its usage.

Proposed Change:

Replace the previous text with this statement

The university reserves the right to remove a preferred name if it is used improperly, including but not limited to , avoiding legal obligations or misrepresentation.

Rationale

We found this new wording at a few other schools and feel that this was just a little easier to understand.

Change 2

Current Text:

The preferred first name will appear in the following locations:

Online Directory	Blackboard	Duck ID Card (please see card info below)
Class rosters	Grade rosters	Library*
Housing and Dining*	Recreation Center*	Alumni
Student Health*	Counseling Center*	

Admissions (will include both preferred and legal name)
Banner Data System (will include both preferred and legal name)

The preferred first name will NOT appear in these locations:

Payroll documents including checks	Official transcripts
Financial Aid Documents	Official Medical Records

Proposed Change

Remove the current list and add this text only:

Once established, preferred name will be used across university systems, where possible. The legal names will continue to be used for certain university records, documents, and business process where use of legal name is required by law or university policy.

Rationale

The committee felt that it would be more appropriate to not name all of the areas as the university structure, name of different applications and offices will change over time. There are more than likely areas we have not even thought of. The committee felt the statement made better sense for the policy and the implementation plan would include specific offices names etc.

Please let me know if there is anything else I can be helpful with.

Chicora

From: Randy Geller
Sent: Friday, October 18, 2013 10:49 AM
To: Chicora Martin
Subject: Re: Preferred name feedback


Chicora--i am out of the office and having trouble viewing the document. Would you point out for me what the two changes are? Tx

On Oct 18, 2013, at 10:44 AM, "Chicora Martin" <chicora@uoregon.edu> wrote:

Randy- it looks like we can get on the October 30th Senate Exec committee agenda. Can you please let me know if you have any concerns with the two small changes that I mentioned? I have reattached the file here. They are highlighted in red.

Chicora Martin

Assistant Dean of Students- Office of the Dean of Students
Director- Lesbian, Gay, Bisexual, Transgender Education and Support Services
Area Director- Multicultural Inclusion and Support, Center for Multicultural Academic Excellence
Co-coordinator- Bias Response Team

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<Preferred_First_Name_Draft 4_19_13.docx>