

# Student Records

## Add a Preferred Name

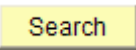


### Overview

This process will outline how to add a preferred name for a student.

- Transcript requests may reflect a more current name for a student than what is currently in the system and the student may formally ask that their name be changed. In these cases, follow the established business process for changing the student's Primary name before proceeding with the transcript request.
- In other cases, the student request may reflect a name not currently in the system for that University ID but no request is made to formally change the record name (Primary name). It is important that each name tied to a particular student ID be reflected in the system for Search/Match purposes (and for possible future transcript request research). In these cases, add a Preferred Name row to maintain this history.
- When inserting this new preferred name, pay particular attention to the effective dates and the Primary/Preferred name rows. While we want the Preferred name reflected in the database, if the "current" preferred name appears to be correct, insert this additional preferred name with a prior date so that the row is inserted but the current preferred name remains with the most recent effective date.

### Steps

#### Adding a Preferred Name

1. Navigate to: **Campus Community > Personal Information (Student) > Biographical (Student) > Names.**
2. Enter the student's **ID** or **Last Name** and **First Name.**
3. Click .  
If multiple search results are returned, select the appropriate student.
4. In the **Current Names** area, you will see the different types of names in the **Name Type** column.
5. Find the "Preferred" **Name Type** and click the [Name History](#) link if it is active.
6. Click  in the **Names Detail** area.
7. A new row will be inserted with the existing data copied into the new row. The current (system) date will be inserted as the **Effective Date**. If you need to back date the name change, click  and select the appropriate date from the calendar. This is a required field.

#### NOTE:

When inserting this new preferred name, pay particular attention to the effective dates and the **Preferred** name rows. While we want the **Preferred** name reflected in the database, if the "current" preferred name appears to be correct, insert this additional preferred name with a prior date so that the row is inserted but the "current" preferred name remains with the most recent effective date.

# Student Records



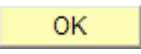
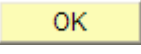
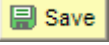
## Add a Preferred Name

- The **Format Using** field will default to “English”.
- Click the Edit Name link.

The screenshot shows a web browser window with a 'Names Detail' page. A modal dialog box titled 'Edit Name' is open. The dialog contains the following fields and options:

- Type of Name:** Preferred
- Effective Date:** 08/20/2007
- Status:** Active (dropdown)
- \*Format Using:** English (with a 'Change Format' link)
- Prefix:** (dropdown menu)
- First Name:** Ima
- Middle Name:** B
- Last Name:** Student
- Suffix:** (dropdown menu)
- Display Name:** Ima Student
- Formal Name:** Ima Student
- Name:** Student,Ima B

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

- (Optional) Enter the appropriate **Prefix**, or title, (Mr, Ms, Mrs. or Dr.) that should precede the student's name or click  and select it from the drop-down list.
- Update the student's **First Name**.
- Update the student's **Middle Name** or initial.
- Update the student's **Last Name**.
- In the **Suffix** field, enter the appropriate suffix, (Junior, Senior, etc.) that should follow the student's name or click  and select it from the drop-down list.
- Click  to return to the *Name Type History* page.
- Click  to return to the *Names* page.
- Click  to save your changes.