POLICY STATEMENT

Preferred Name Policy

ORIGINATING OFFICE
Office of Social Equity

PURPOSE
Students and employees may request to have a preferred name that differs from their legal name on certain University records and documents, and for other educational or professional purposes.

SCOPE
This policy applies to students and employees who seek to use a preferred name that differs from their legal name on certain University records.

OBJECTIVE
To accommodate students and employees who prefer to use a name other than their legal name. The university recognizes that as a community, many of its members use names other than their legal names to identify themselves. As long as the use of this different name is not for the purposes of misrepresentation, the University acknowledges that a preferred name may be used in addition to the person’s legal name.

DEFINITIONS (UPPERCASE AND UNDERLINED)
1. PREFERRED NAME: A name that a person chooses to be known by. This may include a person’s full name, or any part thereof.
2. LEGAL NAME: A name that a person is identified by for legal, administrative, and other official purposes.
POLICY

It is the policy of the University that any student or employee may choose to identify themselves within the University's information systems with a preferred name in addition to their legal name. It is further understood that the person's preferred name may be used as articulated in Appendix A. The preferred name may not be used where the use of the legal name is required by policies applicable to the University, the Pennsylvania State System of Higher Education, or applicable local, state or federal regulations or law.

The individual is free to determine the preferred name they want to be known by in the University's information systems. A preferred name will be denied or revoked when a name is deemed inappropriate for reasons including, but not limited to, avoidance of a legal obligation, fraud, use of obscene or offensive language, or misrepresentation.

RESPONSIBILITIES AND PROCEDURES

1. Student Responsibilities
   (1) Students seeking to use their preferred name may do so by following the procedure outlined in Appendix A.
   (2) Students should submit their request at least two weeks prior to the start of the semester. All attempts will be made to utilize the preferred name, however it may not be possible in all cases.
   (3) Students opting to use a preferred name after the start of the semester are responsible for notifying their teaching faculty and academic advisor; as well as other relevant parties to potentially include coaches, student group advisors, campus employment supervisors, etc. Students residing in the residence halls are also responsible for notifying their Resident Director and Resident Advisors.

2. Employee responsibilities
   (1) Employees requesting a preferred name should send the request by email to SU Human Resources hr@ship.edu. The employee will be notified of the status of their request within 10 business days.

APPROVALS

President's Cabinet: Monday, September 11, 2017
Appendix A

The preferred name will be used in select University-related systems and documents as listed below.

- Learning Management System
- Student Advising Systems
- Faculty Class Lists
- Student Co-curricular Systems
- Housing System
- Student Judicial System
- Email Display Name
- Student Reports
- Commencement Program and Ceremony
- Alumni System
- Student and Employee ID Card
- Degree Audits
- Diploma
- Athletic Rosters
- Dining Services
- Student Job/Career Services
- Recruiting Systems

The legal name will be used for official University records including, but not limited to the following items.

- Academic Transcript
- Enrollment Verifications
- Employment verifications
- Degree Verifications
- Employment Documents
- Payroll Documents (paycheck, W2, etc.)
- Athletic External Reporting
- Student Medical Records
- Legal Documents and Reports
- Student Accounts Statements
- Financial Aid Documents
- Scholarship Documents
Preferred Name Policy

- Mailing Information
- Admissions Applications

The procedure for students making a request for a preferred name is as follows:

- The student will complete and submit the Preferred Name Request form, available at http://www.ship.edu/Social_Equity/Social_Equity_Policies/, to the Registrar’s Office. A student will only be permitted to change a preferred name one time per semester.
- The request will be reviewed. If additional questions or follow-up is necessary, the student will be contacted via their Shippensburg University email account. Otherwise, the applicable updates will be made.
- If a student feels their request has been unjustly denied, the student may file an appeal with the Shippensburg University Office of Social Equity.

The procedure for employees making a request for a preferred name is as follows:

- Employees requesting a preferred name should send the request by email to SU Human Resources hr@ship.edu. The employee will be notified of the status of their request within 10 business days.
- The request will be reviewed. If additional questions or follow-up is necessary, the employee will be contacted via their Shippensburg University email account.
- If an employee feels their request has been unjustly denied, the employee may file an appeal with the Shippensburg University Office of Social Equity.