

### Carnegie Mellon Preferred Name Guidelines

#### Guiding Principle\*

Carnegie Mellon University recognizes that students may wish to use a name other than their given names as recorded on official university documents. When designated by a student, the university will use a preferred first/given name in all university documents except where use of the official name is required by university business or legal need.

It is understood that the use of a preferred name is not permissible for any purpose of misrepresentation and can be denied at the discretion of university administration.

\*Beginning Fall 2011, the university launched the initial use of the preferred name, as described below. Updates will be communicated to the campus community as the necessary changes are completed to support continued implementation.

#### Definitions

**Preferred Name:** First/given name designated by a student in Student Information Online (SIO) by which he or she prefers to be known. Students may not designate a preferred family/last name.

**Given Name:** Also commonly known as the first name, the university acknowledges that the given name is what is recorded as the official university name.

**Family/Last Name:** Name officially recorded in university systems and documents; cannot be changed without taking appropriate steps to change one's name.

**Official University Name:** First/given name followed by family/last name that is imported from admission data, effectively known as the official university name.

#### How to Add Preferred Name in SIO

Students who wish to designate a preferred first/given name will do so using Student Information Online (SIO) ([www.cmu.edu/hub/sio](http://www.cmu.edu/hub/sio)). Under **My Info**, students will **View and Update My Info**. Because preferred names are set using SIO, only students with access to SIO can set a preferred name. The **Preferred Name field** is editable in SIO at any time and the update will be immediately effective.

To assist faculty and instructors in consistently addressing a student throughout the course of a semester, students are encouraged to add a preferred name prior to the start of a semester.

#### Places the Preferred Name Will Display

Once entered in Student Information Online (SIO), the preferred name will be displayed in SIO together with the official first/given name for reference by the individual student of his/her own record and in the S3 Admin Console (student information system) for authorized staff and faculty advisors. The preferred first name will appear on the student summary header in the S3 Admin Console together with the official first/given name for reference by staff and faculty advisors authorized to access a student's information.

Once entered by the student in SIO, the preferred name will be used in the following systems and locations and will be displayed *instead of* the student's official university first/given name:

- Academic resources: S3 Admin Console and S3 Faculty Course & Grade Information course & photo rosters, Canvas, Stellaris Degree Audit application
- Unofficial academic record
- Residential rosters
- Health Services and Counseling and Psychological Services (preferred and official names will be used for medical records)
- Student ID Cards: Preferred first name and official last name are listed on the front of the card; the official first/given and last name are listed on the back of the card

- Handshake: Student Profile (if student would not like the preferred name to be the name of record, email [gmarnell@andrew.cmu.edu](mailto:gmarnell@andrew.cmu.edu))

The official university first/given name will always be used in the following systems and locations:

- Transcripts
- Official enrollment and degree verifications
- Payroll and payroll systems
- Student billing and the student account invoice (including invoices)
- Financial aid processing and financial aid award letters
- My Plaid Student

Future applications of the preferred name currently under development and exploration for application:

- Library
- Athletics rosters
- Alumni Relations

Note: Future application may vary according to the CMU campus and/or location.

### **Student Privacy Considerations**

Consistent with the Family Educational Rights and Privacy Act (FERPA), Carnegie Mellon allows for the release of directory information, which includes a student's preferred name when one is designated in SIO. If a student does not want disclosure of the preferred name to external organizations or persons, she or he can set a directory flag on the student record, which initiates a directory restriction. Choosing a directory restriction means the university will not list the student in the directory and cannot confirm student status to anyone inquiring about the student record. For more information about FERPA and setting a directory restriction, see <http://www.cmu.edu/hub/ferpa.html> or contact the University Registrar's Office at 412-268-8186.

### **Changing the email display name (aka CMUname)**

Changing the preferred name in Student Information Online will not impact the name that displays on a student's email address. To select a CMUname that is different from the assigned name, first review the [rules associated](#) with selecting a CMUname and then follow the instructions on the [Computing Services website](#).

### **Name Display on the CMU Directory**

At Carnegie Mellon, there are two distinct places for students to provide or update a preferred name. These Preferred Name Guidelines for Students highlight the addition of a preferred name via Student Information Online (SIO); changes in SIO currently do not appear in the CMU Directory or Directory Search at <http://directory.andrew.cmu.edu/>. Students may elect to designate an additional "Alternate First Name (name by which this person is known)" in the directory by going to Email Tools ([emailtools.cmu.edu](http://emailtools.cmu.edu)) and following the instructions to Edit Directory. Example: William can designate Bill as his Alternate First Name in the directory.

### **Considerations in Using a Preferred Name**

Adding a preferred name to Student Information Online (SIO) is not the same as a legal name change through the court system. A student may be challenged if relying on documents with a preferred first/given name when asked to provide proof of legal name and/or identity for employment or government purposes, such as obtaining a passport.

Other considerations include the use of both the official first/given name and a preferred first name on various documents used for external purposes. For example, a transcript and verification from the university with the official university name and a letter of reference from a faculty member who knows the student primarily by his/her preferred name may require some clarification when applying for internships, jobs, and/or graduate school.

The University Registrar's Office has a name verification document to affirm the official university name and preferred first/given name. To request a verification document, students may visit Student Information Online (SIO) ([www.cmu.edu/hub/sio](http://www.cmu.edu/hub/sio)) and under **Academic Info**, click on **Request Verification** for the Preferred Name Verification.

### **For More Information**

Please contact the University Registrar, John Papinchak, at [jp7p@andrew.cmu.edu](mailto:jp7p@andrew.cmu.edu) with any questions regarding these guidelines and their implications.