



POLICY ON NAME CHANGES

Policy Statement

The following policy applies to individuals affiliated with The University of North Carolina at Chapel Hill (University) who wish to change their name for official University purposes. Individual demographic data (e.g., name, date of birth) is a critical component for multiple University processes including but not limited to payroll, IT system access, and Student records.

Historically, requests for name changes have been handled in a decentralized manner. Since all Student and employee demographic data is now housed in a single system and is utilized by a number of University offices and processes, it is important to standardize the process. This Policy will define the name change procedures to ensure consistent practices across campus.

Definitions

Background Check Person – A person who has had a background check processed by the University.

CEU Student – A person who is completing Continuing Education course work through the Friday Center.

Connect Carolina – A PeopleSoft Enterprise Resource System used by the University to house and process University services and data

Current Employee – A person who is currently working for the University in a permanent or temporary SPA or EPA position.

Finance Person – A person who is being reimbursed by the University Finance and Accounting services

GuestID – A user ID generated for a person who needs limited access to non-sensitive systems.

School/Division Person Update Users – Users who are authorized to make person demographic data changes in Connect Carolina.

Image Now – A secure document storage database.



Non-Employee and Non-Finance Person – A person who does not fall into the categories of Current Employee, Background Check Person, or is paid by University payroll.

ONYEN – The “Only Name You’ll Ever Need” is a user ID generated for access to University systems.

Preferred Name – The name that an individual chooses to use (e.g., Mike for Michael or Beth for Elizabeth).

Primary Name – The legal name of the individual as shown on an SSN card (if a US citizen) or a passport (if not).

Previous Employee – A person who previously worked for the University in a permanent or temporary SPA or EPA position within the last year (12 calendar months).

Retiree/Past Employee – A person who previously worked for the University in a permanent or temporary SPA or EPA position but who retired or whose employment ended more than one year (12 calendar months) ago.

Student/Alumni – A person who has matriculated at the University.

SSN – Social Security Number issued by the Social Security Administration for the purposes of earnings reporting, social security benefits, disability benefits, etc.

Third Party Proxy for Students – A person, authorized by the Student, who can be their proxy to access and update information electronically.

UNC Directory – An electronic index of people at the University. It is also where Preferred Names can be updated by individuals with an ONYEN or guestID.

Audience

Any University employee who is designated to update names in Connect Carolina, with the exception of Preferred Name.

Reason for Policy

Incorrect name changes are costly to the University because they result in disrupted services and may result in penalties from the federal government for the submission of incorrect data on, for example, tax documents. This Policy establishes a basic set of requirements for all name changes and aims to assure accurate records for all persons affiliated with the University.



Procedures

Name Change Procedures

An individual who wishes to change their name with the University is required to gather and provide the documentation listed below. The documentation must be in English. The name change processor will collect and scan all documents into Image Now and make the name change in Connect Carolina. The name change will be the full legal name of the person who wishes to have their name changed.

Note: The required documentation varies based on the individual's affiliation with the University.

Primary and Former Name change requirements: Primary Name must include the full legal name of the individual. If an SSN card is provided, the name must appear as it appears on the SSN card. The following fields are included in the name:

- First Name: not to include nicknames or initials
- Middle Name: not to include nicknames or initials
- Last Name: not to include initials or suffixes
- Suffix: only to include suffix

Name Change for:	The completed change form and the following documentation is required:
Employee or Finance Person <ul style="list-style-type: none"> • Current Employee • Previous Employee • Background Check Person • Finance Person 	<ul style="list-style-type: none"> • SSN card displaying new name



<p>Non-Employee & Non-Finance Person</p> <ul style="list-style-type: none"> • Student/Alumni • Third Party Proxy • Retiree/Past Employee 	<ul style="list-style-type: none"> • SSN card displaying new name; or • One of the following documents (displaying current name): <ul style="list-style-type: none"> ○ Passport, provided it contains a photograph or information such as date of birth, gender, height, eye color and address. ○ Permanent Resident Card or Alien Registration Card ○ Employment Authorization Document (Card) that contains a photograph ○ Driver's license or ID card issued by a state, or outlying possession of the United States, provided it contains a photograph or information such as date of birth, gender, eye color and address. ○ ID Card issued by federal, state, or local agencies or entities, provided it contains a photograph or information such as date of birth, gender, height, eye color and address. <p><i>Note: please copy page/surface which contains the name and the photo. They may be different pages/sides.</i></p>
<p>Everyone Else – Anyone else (including Student Applicants, Affiliate not needing background checks, CEU student, etc)</p>	<ul style="list-style-type: none"> • Name/SSN Change Form

Passport Name change requirements: Passport name changes can only be completed by International Student and Scholar Services.

Provide:

- Completed Name Change form and
- Passport, provided it contains a photograph or information such as name, date of birth, gender, height, eye color and address.

Preferred Name: Preferred name changes can be done by any person with access to update name; however current Students and employees should be encouraged to update their own preferred name through the UNC directory.



Roles and Responsibilities

Name Change Processor – this person is responsible for collecting and entering name changes, scanning supporting document(s) to Image Now, and ensuring that required documents are maintained confidentially and secured properly as per University standards.

Name Change Requester – this person is responsible for providing supporting documentation to the Name Change Processor and ensuring that all required documentation is complete and accurate. The individual may only request a change to their own record.

Related Statutes and Policies

- Family Educational Rights and Privacy Act (FERPA) – <http://policies.unc.edu/files/2013/05/FERPA.pdf>
- Information Security Policy – <http://its.unc.edu/files/2014/08/Information-Security-Policy.pdf>
- UNC directory – <https://itsapps.unc.edu/dir/dirSearch/view.htm>

Contacts

For questions regarding this Policy, please contact the PID Office.

For Name Change questions please contact:

Registrar's Office – <http://registrar.unc.edu/about/contact-the-office-of-the-registrar/>

School/Division Person Update Users – the individual designated as your departmental person update user.

PID Office - <http://www.pid.unc.edu/ContactUs>

Forms

[Name/SSN Change Form](#)



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

Responsible University Officer
Affiliated Persons Policy Committee

Responsible Office
PID Office

Document History

- Effective Date: February 1, 2016
- Last Revised Date: May 12, 2016