

**INDIANA UNIVERSITY OF PENNSYLVANIA**  
**POLICY STATEMENT**

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Subject: Preferred First Name Policy

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Date: March 8, 2017

Distribution Code:

Reference Number:

Revision Date:

A, B, Affiliate Organizations

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Addition

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Originating Office

President's Approval:

Deletion

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New Item

X

Office of Social Equity

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**A. Purpose:**

Indiana University of Pennsylvania (IUP) has established this policy that allows students, faculty, staff, and alumni to indicate their preferred first names to the University community even if they have not legally changed first name. The use of a preferred first name does not change the legal name on IUP's records.

**B. Policy:**

Upon written request by the individual, a preferred first name will be used instead of the person's legal first name in select University-related systems and documents. The legal name will be used in all University related systems and documents related to official University records, a sample of which is listed below.

An individual is permitted to make one preferred first name request. Extenuating circumstances will be addressed on a case-by-case basis. The University reserves the right to suspend the individual's privilege to update their preferred first name.

This policy may be modified, changed, altered, or rescinded at the discretion of IUP.

Preferred first name requests will be denied or revoked when a name is deemed inappropriate including, but not limited to avoid a legal obligation, fraud, obscene/offensive language, or misrepresentation.

**C. Definitions:**

A. Preferred First Name: A preferred first name is defined as an alternative to the individual's legal name as designated by the individual in university systems. This is a name the individual prefers to be used within the IUP community. These may include individuals who prefer to use:

- a middle name or nickname instead of a first name;
- an anglicized name;
- a name to which the individual is in the process of legally changing ; or
- a name that better represents the individual's gender identity.

Preferred first names will be used in the following systems and records, a sample of which is listed below, but not limited to the following:

- Student or Employee Identification Cards (I-Cards)
- Online Find People directory
- Official email display name
- Class and grade rosters (for students and employees taking courses)
- D2L
- MyIUP
- Crimson Connect
- Housing rosters
- Press releases
- Alumni mailings & invitations
- Alumni class notes
- Commencement booklet and line-up card (announced name at commencement)
- Other venues, as appropriate

- B. Legal Name: A person's legal name is the name used for official government documents, such as licenses, passports, and tax forms. Also commonly known as given name, this is the name that is officially recorded in University systems and documents. This name can only be changed by IUP following submission of appropriate legal documentation.

Legal names will continue to be used where there is a University business or legal need. This includes but is not limited to the following:

- Legal Documents and reports produced by the University
- Student account statements (bills)
- Financial aid and scholarship documents
- Transcripts
- Diplomas
- Enrollment & degree verifications
- Alumni tax receipts & gift agreements
- Employment documents and verifications
- Payroll documents such as paychecks, W2s
- Employee Self Service portal (ESS)

**D. Procedures:**

- A. Students: Students requesting a preferred first name should complete a Preferred First Name Request form with the Office of the Registrar. The student will be notified of the status of their request within 10 business days.
- B. Employees: Employees requesting a preferred first name should complete a Preferred First Name Request form with the Office of Human Resources. The employee will be notified of the status of their request within 10 business day.
- C. Alumni: Alumni requesting a preferred first name must complete a Preferred First Name Request form with the Office of Advancement Services. The alumnus will be notified of the status of their request within 10 business days.
- D. Appeal Process: Anyone who feels their preferred first name change was denied inappropriately may file an appeal with the Office of Social Equity.

E. Fee associated with issuance of a new I-Card under this policy will be waived one time for each individual. This policy does not apply to the waivers of fees associated with the replacement of lost I-Cards. The applicant's existing I-Card must be shown, at the I-Card office, as part of the preferred name change process.

**E. Recision:**

This policy will not be rescinded or modified except by action of the IUP President, following consultation with the University Senate, and in accordance with University Senate By-Law and Constitution.

**F. Publications Statement:**

The IUP Office of Social Equity will publicize and transmit this policy annually to all members of the University community.

**G. Distribution Code**

A – All Employees

B – All Students

Affiliate Organizations