INDIANA UNIVERSITY OF PENNSYLVANIA
POLICY STATEMENT

Subject: Preferred First Name Policy	
Original Date Established: March 8, 2017	**Revision Date:** August 25, 2020
Originating Office: Social Equity and Title IX Office	**President's Approval:** Michael A. Driscoll
Distribution Code: A, B, Affiliate Organizations	**Date of Approval:** October 8, 2020

A. Purpose:

Indiana University of Pennsylvania (IUP) has established this policy that allows students, employees, and alumni to indicate their preferred first names to the University community even if they have not legally changed their 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. Preferred first names will be used in systems and records limited to the extent permitted by law, regulation, or Board of Governors policy, and to the extent technologically possible. The legal name will be used in University-related systems and documents related to official University records.

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This policy may be modified, changed, altered, or rescinded at the discretion of IUP.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

1. Preferred First Name: A preferred first name is defined as an alternative to the individual's legal name as designated by the individual. 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 to the extent technologically possible. Some venues will require action by the individual seeking to use a preferred first name in order to effectuate the change.
   - Student or Employee Identification Cards (I-Cards)
   - Online Find People directory
   - Official email display name
   - PC login (not username)
   - Class and grade rosters (for students and employees taking courses)
   - D2L Learning Management System

- Crimson Connect
- Housing rosters
- Alumni mailings & invitations
- Alumni class notes
- Commencement booklet and line-up card (announced name at commencement)
- Diplomas

2. 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 a 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)
   - Student tax information (1098T)
   - Financial aid and scholarship documents
   - Transcripts
   - 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:
   1. Students: Students requesting a preferred first name should complete a Preferred First Name Request online form through the Office of the Registrar.
   2. Employees: Employees requesting a preferred first name should contact the Office of Human Resources.
   3. Alumni: Alumni requesting a preferred first name should contact the Division of University Advancement.
   4. Appeal Process: Anyone who feels their preferred first name change was denied inappropriately may file an appeal with the Social Equity and Title IX Office.
   5. Fee: The 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 current I-Card must be shown at the I-Card office as part of the preferred name change process.