



POLICY: PREFERRED FIRST NAME POLICY

A. Purpose & Scope:

California University recognizes members of its community use and identify with first names that are different from their legal names. A chosen or preferred name, may be a valuable component of a person's identity and impact their ability to successfully navigate the campus environment. Therefore, the University has established this policy that allows preferred first names to appear in select University systems and records, even if individuals have not changed their legal names.

While anyone is welcome to use a preferred name, this policy was developed to respond to the needs of transgender and non-binary communities, international communities, and anyone who prefers the use of a name other than their legal name.

When formally requested, Cal U has established this policy that allows students to indicate their preferred first names to the university community even if they have not legally changed first names. The use of a preferred first name does not change the legal name on Cal U's records.

B. Definition(s):

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

Family/last name: The name officially recorded in university systems and documents. This name can only be changed by submission of appropriate legal documentation that authorizes a change.

Preferred name: The given name of the student that they prefer to be known on campus.

Legal name: The name of the student that is generated from the admissions application and is the official name of record.

C. Policy:

Students can select a preferred first name upon the first point of contact with Cal U. 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. After matriculation, an individual submits a written request for a preferred first name change to the Director of Equity, Compliance and Title IX Coordination, located in the Human Resources Office (Dixon Hall, Rm 408).

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 Cal U. 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.

D. 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 Cal U community. These may include individuals who prefer to use:

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

Preferred First Name Usage:

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:

- o Student or employee identification cards (CalCards)
- o Housing rosters
- o Official e-mail display name
- o D2L
- o Diplomas (before graduating, students have the opportunity to request what name will appear on their diploma)
- o Commencement booklet and line-up card (announced name at commencement)
- o Other venues, when possible.

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 Cal U 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:

- o Legal documents and reports produced by the university
- o Student account statements (bills)
- o Financial aid and scholarship documents
- o Transcripts
- o Enrollment and degree verifications
- o Alumni tax receipts and gift agreements
- o Employment documents and verifications
- o Payroll documents such as paychecks, W2s

E. Procedure(s):

A. Upon first contact with the university, information submitted online will provide the option of preferred first name. After matriculation, students requesting a preferred first name should complete a Preferred First Name Request form, found on the university website, and submit to the Director of Equity, Compliance and Title IX Coordination, located in the Human Resources Office (Dixon Hall, Rm 408). The student will be notified of the status of their request within 10 business days.

B. Appeal Process: Anyone who feels their preferred first name change was denied inappropriately may file an appeal with the Director of Equity, Compliance and Title IX Coordination, located in the Human Resources Office (Dixon Hall, Rm 408). After reviewing the request and appeal information, the final decision will be that of the Vice President for Student Affairs.

C. Fee: The fee associated with issuance of a new CalCard 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 CalCards. The applicant's existing CalCard must be shown, at the CalCard office, as part of the preferred name change process.

Publications Statement

The Director of Equity, Compliance, and Title IX Coordination will publicize and transmit this policy annually to members of the university community.

Frequently Asked Questions

Download the [FAQs for the Preferred First Name Policy](#).

Requesting a Preferred First Name

Download (pdf), complete, and submit the [Preferred First Name Request Form](#).

F. Effective date:

Adopted: **by:** President's Cabinet

Amended Date: July 21, 2020 **by:** President's Cabinet



PREFERRED FIRST NAME REQUEST

To request a preferred first name, complete this form. Submit form to the Director of Equity, Compliance and Title IX Coordination, located in the Human Resources Office (Dixon Hall, Rm 408).

The use of a preferred first name will be utilized except where the use of the legal name is required by University business or legal need. Such examples include but are not limited to transcripts, financial aid, billing/payroll, ESS, and enrollment certifications. Within 10 business days, you will receive a notification from the applicable office that your request has been processed.

A new CalCard can be obtained at that time. The \$20 replacement fee will be waived one time. This policy does not apply to the waiver of fees associated with the replacement of lost CalCards. The applicant's existing CalCard must be shown at the CalCard Office, as part of the preferred name change process.

Legal Name: _____
Last Name First Name MI

Preferred First Name: _____ Date of Birth: _____
First Name Only

CWID#: _____

Cal U Email: _____ Phone: _____

Signature: _____

REQUIRED _____
Date

Disclaimer: Pursuant to University policy, inappropriate use of the preferred name, including but not limited to misrepresentation or attempting to avoid legal obligation, may be cause for denying this request.

Preferred First Name Frequently Asked Questions (FAQs)

Cal U recognizes that many individuals prefer to use first names other than their legal names to identify themselves. As long as the use of this preferred first name is not for the purpose of misrepresentation, the university acknowledges that a preferred first name can be used where possible in the course of university business.

- **Can any member of the California University of Pennsylvania (Cal U) community designate a preferred first name?**
 - Any student may choose to set a preferred first name.
- **How do I request a preferred first name?**
 - An on-line form is available on the university website and should be submitted to the Director of Equity, Compliance, and Title IX Coordination located in the Human Resources Office (Dixon Hall, Rm 408).
- **May I set my preferred first name to whatever I want?**
 - Yes, however, the University reserves the right to deny any request that it deems inappropriate including, but not limited to, avoiding a legal obligation, fraud, obscene language, or misrepresentation.
- **How many times may I change my preferred first name?**
 - You may change your preferred first name once.
- **May I use my preferred first name for everything at Cal U?**
 - Your preferred first name will be used except where the use of the legal name is required by University business, system reports or legal need.
- **How is my preferred first name used on campus? 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 (CalCards)
 - Housing rosters
 - Official e-mail display name
 - D2L
 - Diplomas
 - Commencement booklet and line-up card (announced name at commencement)
 - Other venues, when possible.
- **How can I get my preferred first name on my CalCard?**
 - Within 10 business days, you will be notified by the appropriate office that your preferred first name request has been processed. You can then contact the CalCard office at the Information Desk in the Natali Student Center.
 - The applicant's existing CalCard must be shown at the CalCard Office. A one-time waiver of the replacement fee will be allowed as part of the preferred name change process. The fee waiver does not apply to the replacement of lost CalCards.