

Use this task to update the name you want to use in UCPath.

Note: Currently the name appears only in the UCPath dashboard.

Dashboard Navigation:

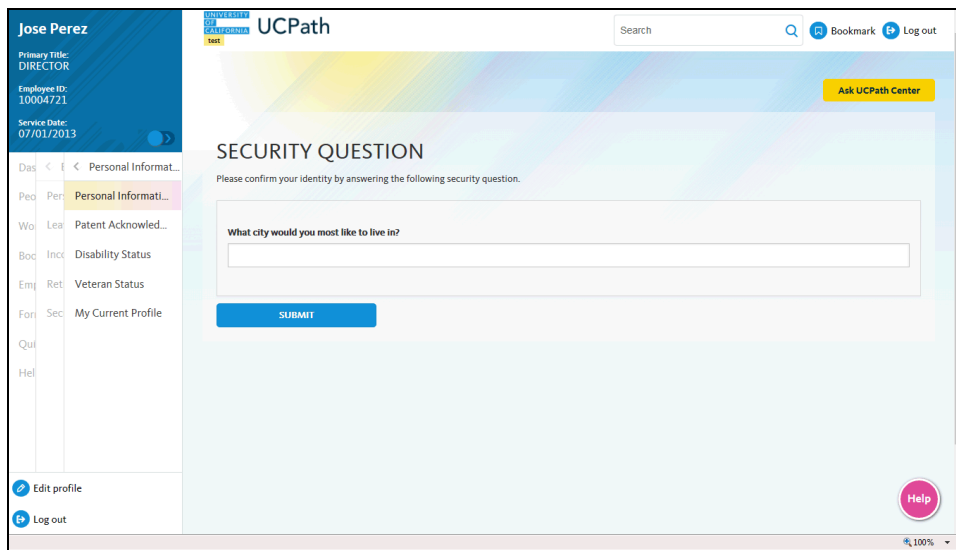
Personal Information > **Personal Information Summary**

or

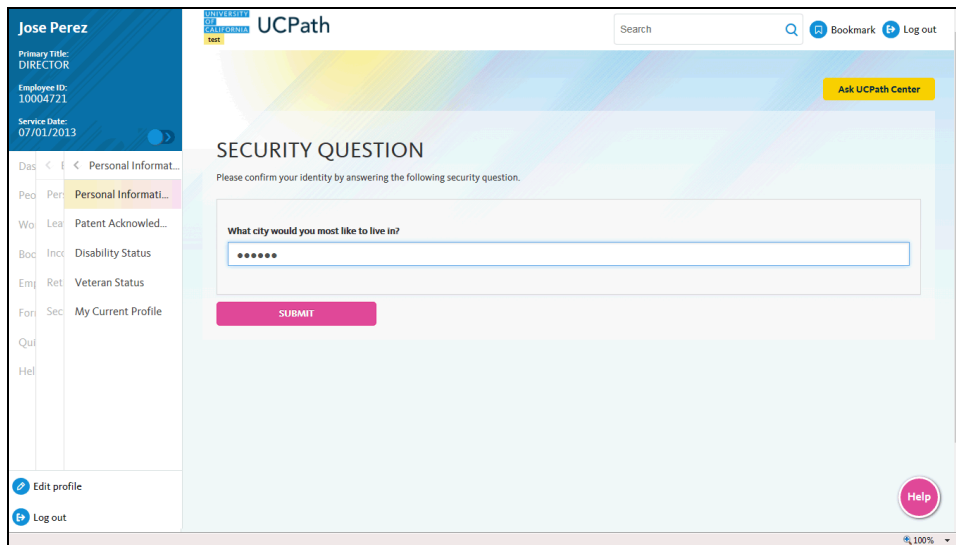
Menu Navigation:


Employee Actions > Personal Information > **Personal Information Summary**

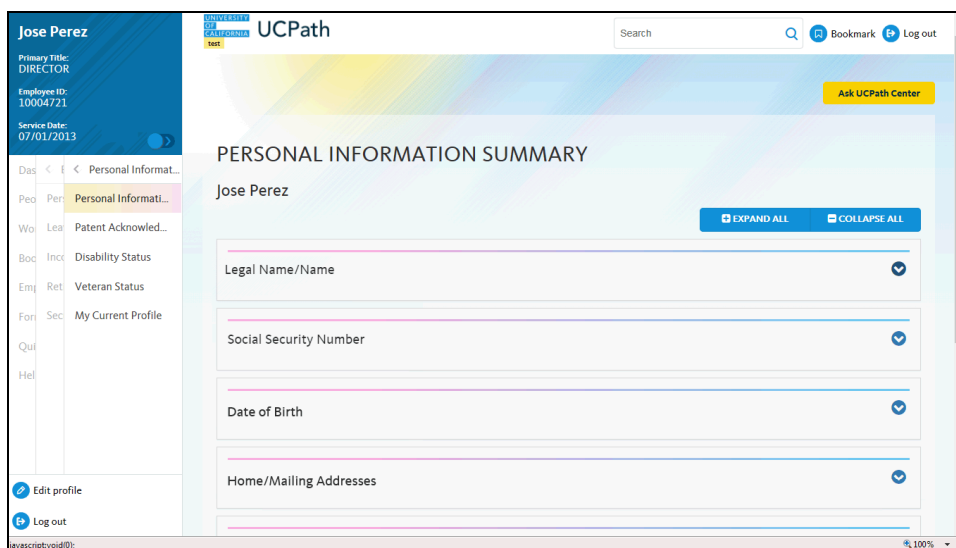
Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.




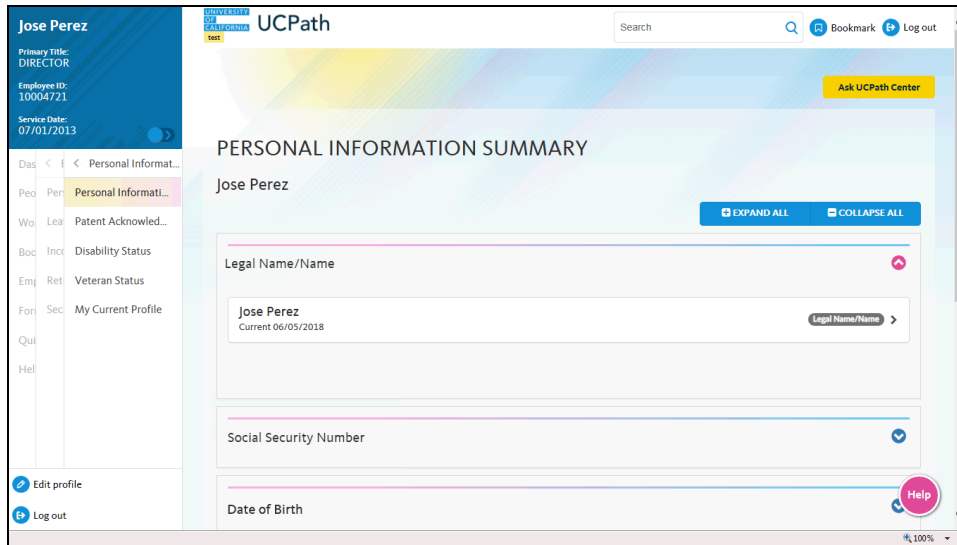
Step	Action
1.	To prevent unauthorized changes, UCPath Online prompts you to verify your identity by answering one of your security questions. If you have not set up your security questions and answers, UCPath Online redirects you to the page where you can set them up.
2.	UCPath randomly selects one of your security questions. Click in the Answer field.
3.	Enter the desired information into the Answer field. This field is not case-sensitive. For this example, enter London .


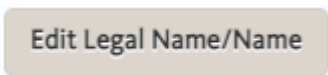


Step	Action
4.	Your answer appears as a series of dots. If you answer incorrectly three times, UCPath prompts you to reset your security questions by verifying your date of birth and the last four digits of your Social Security number.
5.	Click the Submit button. 



Step	Action
6.	<p>The Personal Information Summary page appears.</p> <p>Click the Expand section Legal Name/Name button.</p> 



Step	Action
7.	UCPath displays both your Legal Name and Name values in this section.
8.	<p>Click the Legal Name/Name button.</p> 
9.	<p>Click the Edit Legal Name/Name button.</p> 

The screenshot shows the UCPath interface for editing legal and personal names. The title is "EDIT LEGAL NAME/NAME". A note states: "Legal Name and Name changes cannot be updated at the same time. Name changes will be updated immediately but Legal name changes will need to be approved and processed in the system before any other names can be updated." The form is divided into two main sections: "Legal Name" and "Name".

Legal Name Section:

- Legal Name Prefix:** A dropdown menu with "Select an Option".
- Legal First Name:** A text input field containing "Jose".
- Legal Middle Name:** An empty text input field.
- Legal Last Name:** A text input field containing "Perez".
- Legal Name Suffix:** A dropdown menu with "Select an Option".

Name Section:

- First Name:** A text input field containing "Jose".

Additional UI elements include a search bar, "Bookmark", and "Log out" links at the top right, and a yellow "Ask UCPath Center" button.

Step	Action
10.	<p>The Edit Legal Name/Name page appears.</p> <p>Legal Name values display first, followed by Name values.</p> <p>Legal Name is the name that identifies a person for legal or certain official purposes. In UCPath, these are always labeled as “Legal Name” and never as “Name”. Its presentation and use are restricted to protect confidentiality.</p> <p>Use the Update My Legal Name task to update your Legal Name.</p> <p>Name is a self-chosen or personal and/or preferred professional name used instead of a Legal Name. This name is used for university business and education whenever possible. It is the standard UCPath name field used and presented on pages and reports throughout the system. These are always labeled as “Name” and never as “Legal Name”. Name fields are initially populated from Legal Name fields.</p> <p>Use this task to update your Name.</p>

EDIT LEGAL NAME/NAME

Legal Name and Name changes cannot be updated at the same time. Name changes will be updated immediately but Legal name changes will need to be approved and processed in the system before any other names can be updated.

Legal Name Allowable Special Characters

Legal Name Prefix
Select an Option

Legal First Name *
Jose

Legal Middle Name

Legal Last Name *
Perez

Legal Name Suffix
Select an Option

Name
First Name
Jose

[Ask UCPath Center](#)

Step	Action
11.	<p>Legal Name values display first, followed by Name values.</p> <p>Name values can be changed at any time and as often as desired, provided Legal Name changes are not in process. Changes are automatic, with no delay times.</p> <p>Legal Name value changes require approval before being applied. During the approval process, Name value fields are locked down and cannot be changed.</p>
12.	Click the scroll button.

Name

First Name
Jose

Your 'First Name' is a name you go by that is different than your legal First name (for example, a nickname that you go by or a name that aligns with your gender identity). If you enter Name here, we'll use it in most of our communications with you, except when it's required for us to use your legal name. As a new employee this field will show your legal first name unless you enter a first name here or provided one during the application or hire process.

Middle Name

Your 'Middle Name' is a name you go by that is different than your legal Middle name (for example, a nickname that you go by or a name that aligns with your gender identity). If you enter Name here we'll use it in most of our communications with you, except when it's required for us to use your legal name. As a new employee this field will show your legal first name unless you enter a first name here or provided one during the application or hire process.

Last Name
Perez

Your 'Last Name' is a name you go by that is different than your legal Last name (for example, a middle name that you go by or a name that aligns with your gender identity). If you enter Name here, we'll use it in most of our communications with you, except when it's required for us to use your legal name. As a new employee this field will show your legal first name unless you enter a first name here or provided one during the application or hire process.


Preview [Refresh Name](#)

Name: Jose Perez Legal Name: Jose Perez PS Format - Legal Name: Perez, Jose

[OK](#) [Cancel](#)

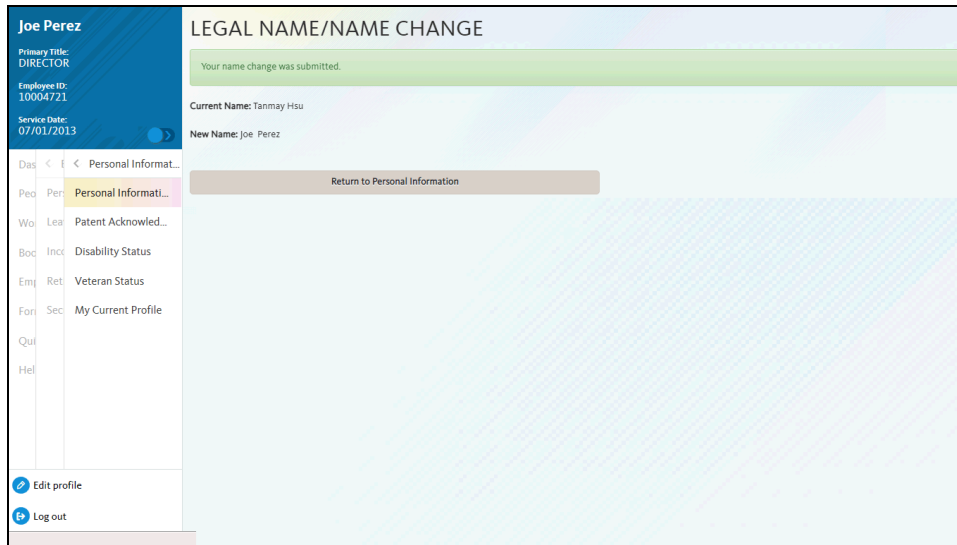
Step	Action
13.	<p>Before changing any values, <u>carefully read the instructions under each value.</u></p> <p>Name values can be changed at any time and as often as desired, provided Legal Name changes are not in process. Changes are automatic, with no delay times.</p> <p>Legal Name value changes require approval before being applied. During the approval process, Name value fields are locked down and cannot be changed.</p>
14.	Click in the First Name field.
15.	<p>Enter the desired information into the First Name field.</p> <p>For this example, enter Joe.</p>

Step	Action
16.	<p>Other Name values can also be changed here.</p> <p>For this example, do not change Middle Name or Last Name.</p>

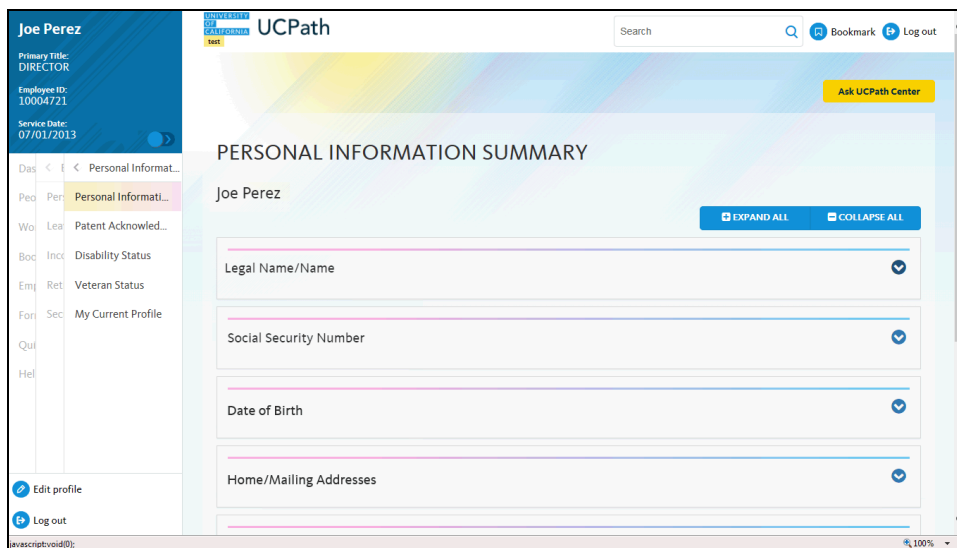
Step	Action
17.	The Preview section displays how your updated Name will appear if the change is submitted.
18.	Click the Refresh Name button. 

Step	Action
19.	Make any changes needed in the appropriate Name fields before moving on to the next step.
20.	To apply the Name change, click the OK button.
21.	Click the Submit button.

Step	Action
22.	Click the OK button.



Step	Action
23.	Your updated Name appears in the upper left corner of UCPath.
24.	Click the Return to Personal Information button.



Step	Action
25.	Your updated Name appears on the Personal Information Summary page.
26.	You have updated your name in your personal information. End of Procedure.

