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Implementing PFN for Student

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Implementing PFN for Student |
University of Illinois
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98988



Disclaimer

The views and opinions in this presentation are those of the presenter and do not necessarily reflect the position of Ellucian.

Agenda

1 Project Details

2 Analysis

3 Our Approach

4 Implementation

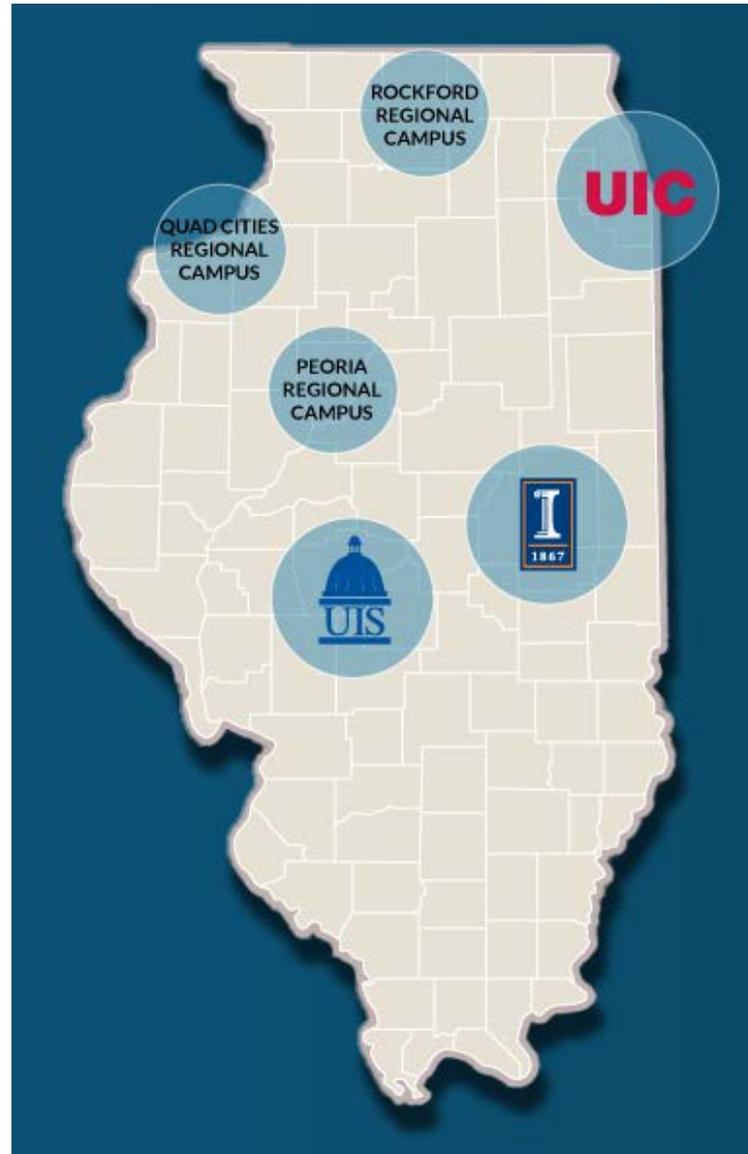
5 Banner 9 Solution

Introduction

- **Discuss our analysis and implementation steps**
- **Show our approach**
- **Ideas on how to implement PFN* at your institution**

*** PFN = Preferred First Name**

Background



Background

- **University of Illinois System**
- **Total Students - 81,500**
 - Urbana- Champaign (46,950 Students)
 - Chicago (29,120 Students)
 - Springfield (5,430 Students)
- **Total Employees – 24,705**

Project Details



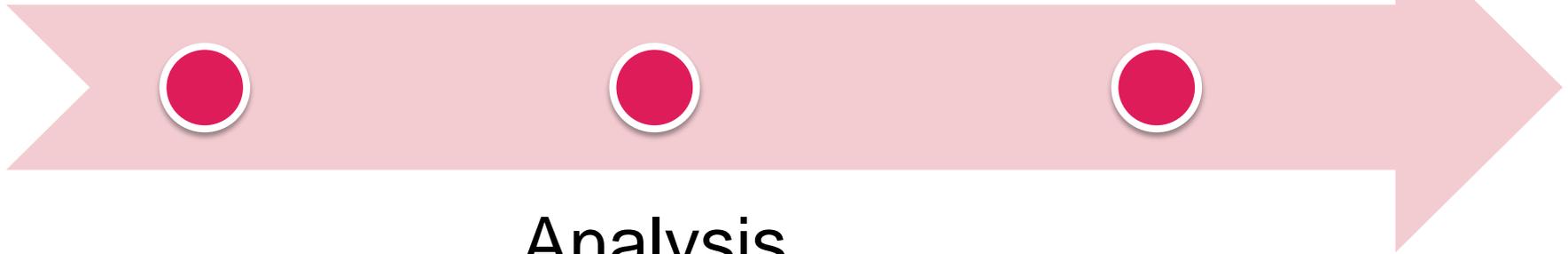
Timeline

Support

Oct 2013-
June 2014

Implement

Jan 2016 –
Aug 2016



Analysis

Jan 2015 –
Aug 2015

Driving Factors

- **UIS Student Government Association**
- **UIC Student Government**
- **UIC Gender and Sexuality Center**

Project Sponsors

- Registrars
- UIC CIO
- Provost
- Vice Chancellor

Project Team

- Registrars
- Associate Registrars
- Project Lead
- Technical Analyst
- Functional Analyst

Stakeholders

- Registrars
- LGBTQ Directors
- Admissions
- FinAid
- Finance
- HR
- i-card Office

Analysis



Use Cases

- **Contacting all professors to advise of PFN**
- **Having to present an ID card with legal name**
- **Being outed when participating in online class projects**

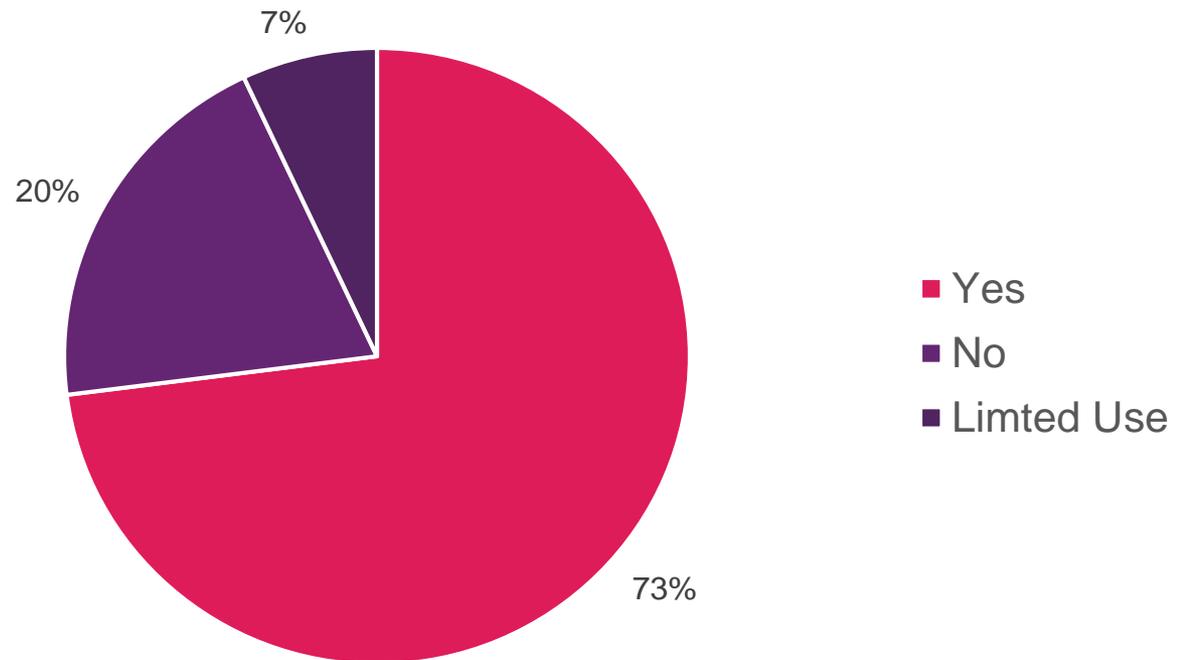
Benefits of PFN

- **Safety and wellbeing of transgender and gender nonconforming**
- **Assimilate to American culture**
- **Addressed by a preferred name**
- **Promotes more inclusive environment**

Risks of PFN

- **Pivotal on identity card change**
- **No action could have legal implications**
- **Downstream departmental systems**

Institutions Using PFN



Impacted Systems

- **List all potential systems**
 - Document
 - Review list regularly
 - Discuss impact
 - Note discoveries

Scope

- **Collecting and displaying Preferred First Name for all Students**
- **On hold or future phase**
 - Functionality for faculty and staff
 - Preferred pronoun and preferred gender

End Result

- **Analysis document**
 - Use Cases
 - Benefits and Risks
 - What our Peers are Doing
 - List of Impacted Systems
 - Scope

Our Approach



Our Approach

- **Store PFN in the Preferred First Name field in SPAIDEN (SPBPERS table)**
- **Batch job creates an inactive 'PREF' name type record**
- **PFN collection pages in student self-service**
- **Self-service displays PFN if available**
- **Display PFN in 10 Banner forms as well as in self-service**
- **PFN stored in University data warehouse**

Modified Forms

- **SPAIDEN, SRARECR, SAAADMS, SGASTDN, SFAREGS and SHADEGR**
- **FOAIDEN and TSAAREV**
- **RRAAREQ and RPAAWRD**

Banner - SPAIDEN

General Person Identification SPAIDEN 8.6.3 [UI_9124_1-CLN-AIDEN-PFN] (BANDEV) (2UIC)

ID: **Generate ID:**

Current Identification | Alternate Identification | Address | Telephone | Biographical | E-mail | Emergency Contact | Additional Identification

ID: **Name Type:**

Person

Last Name:

First Name:

Middle Name:

Prefix:

Suffix:

Preferred First Name:

Full Legal Name:

Non-Person

Name:

ID and Name Source

Last Update

User:

Activity Date:

Origin:

Original Creation

User:

Create Date:

Banner - SPAIDEN

General Person Identification SPAIDEN 8.6.3 [UI_9124_1-CLN-AIDEN-PFN] (BANDEV) (2UIC)

ID: **Generate ID:**

Current Identification **Alternate Identification** Address Telephone Biographical E-mail Emergency Contact Additional Identification

Alternate Names or IDs

Name Type:	<input type="text" value="PREF"/> Preferred First Name	Change Type:	<input type="text" value="Name"/>	Origin:	<input type="text"/>
ID:	<input type="text" value="669753583"/>			User:	<input type="text" value="APPWORX"/>
Last Name:	<input type="text" value="Chung"/>			Activity Date:	<input type="text" value="25-JAN-2017"/>
First Name:	<input type="text" value="Matt"/>			Create User:	<input type="text"/>
Middle Name:	<input type="text"/>			Create Date:	<input type="text"/>

Name Type:	<input type="text"/>	Change Type:	<input type="text" value="ID"/>	Origin:	<input type="text" value="SRKPREL"/>
ID:	<input type="text" value="@03795439"/>			User:	<input type="text" value="APPWORX"/>
Last Name:	<input type="text" value="Chung"/>			Activity Date:	<input type="text" value="17-JAN-2017"/>
First Name:	<input type="text" value="Jaeyoung"/>			Create User:	<input type="text"/>
Middle Name:	<input type="text"/>			Create Date:	<input type="text"/>

Student Self-Service

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UIC The University of Illinois at Chicago

Personal Information Registration & Records Account Billing Information Graduation

Search [RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

Personal Information

To read about your **FERPA (Family Educational Rights and Privacy Act)** rights and responsibilities, click here:
https://registrar.uic.edu/student_records/record_confidentiality.html
Students: This message serves as your annual FERPA notification as required by law.

- [Answer a Survey](#)
- [Addresses & Phones](#)
- [E-mail Addresses](#)
- [Emergency Contacts](#)
- [Name Change Information](#)
- [Preferred First Name](#)
- [Social Security Number Change Information](#)

RELEASE: 8.7 UI_9124_BWS80701_1

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Student Self-Service

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The University of Illinois at Chicago

Personal Information Registration & Records Account Billing Information Graduation

Search

[RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

Preferred First Name

 Please select a **Preferred First Name**.

If you would prefer to be called something **other than your legal first name** by faculty and staff on campus, please indicate your preferred first name below. Please refer to the [University Preferred First Name Statement](#) for further details on where a preferred first name will and won't be used for students.

There is no Preferred First Name for you on record.

RELEASE: 8.7.1 UI_9124_BWS80701_2

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Student Self-Service

The screenshot displays the Student Self-Service interface for The University of Illinois at Chicago. At the top left is the UIC logo, and at the top right is the text 'The University of Illinois at Chicago'. Below this is a navigation bar with tabs for 'Personal Information', 'Registration & Records', 'Account Billing Information', and 'Graduation'. A search bar with a 'Go' button is located on the left, and links for 'RETURN TO MENU', 'SITE MAP', 'HELP', and 'EXIT' are on the right. The main section is titled 'Preferred First Name' and includes a note: 'Your Preferred First Name appears below as it will on class rosters and other Student systems. It may take 24-48 hours for all Student systems to be updated.' A blue box contains the text 'HELLO my name is' above a white box containing the name 'Matt Chung'. At the bottom, a pink-bordered button labeled '[Edit your Preferred First Name]' is visible.

Student Self-Service

The screenshot shows the Student Self-Service interface for The University of Illinois at Chicago. At the top left is the UIC logo, and at the top right is the text "The University of Illinois at Chicago". Below this is a navigation bar with four tabs: "Personal Information", "Registration & Records" (which is highlighted), "Account Billing Information", and "Graduation".

Below the navigation bar is a search area with a text input field, a "Go" button, and links for "RETURN TO MENU", "SITE MAP", "HELP", and "EXIT".

The main content area is titled "Select a Term". On the right side of this area, a user's name and session information are displayed: "669753583 Jaeyoung Chung (Matt)" and "Feb 01, 2017 08:40 am".

Below the title is a help icon and the text: "Select a term for the associated campus from the pull-down list." Below this is a "Select a Term:" label followed by a dropdown menu showing "Spring 2017 - Chicago".

At the bottom of the form is a "Submit" button.

Below the form is a footer section with the text "RELEASE: 8.7.1" and "© 2017 Ellucian Company L.P. and its affiliates."

Faculty Self-Service

Summary Class List

Record Number	Student Name
1	Abd, Milad
2	Alvarez, Fabiola
3	Asif, Maira
4	Castillo, Berenisse
5	Castner, Connor
6	Caves, Peyton
7	Cerda, Fabiola
8	Chavez, Yesenia
9	Chen, Cai
10	Chen, Lingke
11	Chung, Matt

Process

- **Student enters PFN in Student self-service**
- **Immediate update in Banner**
- **Updated in EDW each evening**
- **24-48 hours for other systems**
- **No formal vetting**

Implementation



Implementation

- **Enterprise Data Warehouse Changes**
- **Banner Changes**
- **Campus Specific Services**
- **Communications**
- **Messaging/IAM**
- **Campus Police**
- **University ID card**

Enterprise Data Warehouse (EDW)

- **Store PFN**
- **Modify Business Object universes**
- **Modify reports**

Banner

- **Modify Web for Prospects to not display 'Nickname'**
- **Modify ssb to collect and display PFN**
- **Modify Banner forms to display PFN in keyblock**
- **Modify Class Roster (SFRSLST) to display PFN**

Other Banner Tasks

- Turn off Preferred First Name in Web for Admissions
- Cleanup script for existing PFN

Campus Specific Services

- **Pull PFN into database**
- **Update systems to use PFN - LDAP, AD, portals, email, Learning Management Systems**
- **Change search for online directory**

Communications

- **Create U of I campus wide Preferred First Name Statement**
- **All Banner users**
- **Campus specific**
 - **Departments/units**
 - **Students**

Messaging/Identity Management

- **Add field for PFN and update logic**
- **Downstream systems updated to use PFN**

Campus Police

- **Registrars consulted campus police**
 - **No concerns**
 - **Beneficial to have PFN on campus id card**

University ID card

- **Coming October 2017**
 - **Student card templates (each campus has unique template)**
 - **Store in database**
 - **Search ability**
 - **Setting policies for replacing current card**

Banner 9 Solution



Name Display

- **Name Display Usage Rules form (GUANDSP)**
- **Display configuration available in these self service apps**
 - **Class Roster**
 - **Event Management 9.4**
 - **Faculty Grade Entry 9.5**
 - **Registration 9.5**

Name Display

- **To be adopted by future Banner 9 self-service applications**
 - **Student Profile and Advising – Spring 2017**

Name Display

X Name Display GUANDSP 9.3 (BANDRMS1) (1UIUC) ADD RETRIEVE RELATED TOOLS

Single Multiple Hierarchy Test Rules

NAME DISPLAY RULES Insert Delete Copy Filter

Single Name Rule

Usage Name	DEFAULT	<input checked="" type="checkbox"/> Active
Priority *	<input type="text" value="98"/>	Maximum Length * <input type="text" value="2000"/>
Name Type *	<input type="text" value="****"/> ...	Error Message <input type="text"/>
Comments	<input type="text" value="The default rule to be applied if all prior rules fail. A concatenation of all name parts from the current name record."/>	

Name Sequence

Name Prefix	<input type="text" value="1"/>	Name Prefix Length	<input type="text"/>
First Name	<input type="text" value="2"/>	First Name Length	<input type="text"/>
Middle Name	<input type="text" value="3"/>	Middle Name Length	<input type="text"/>
Surname Prefix	<input type="text" value="4"/>	Surname Prefix Length	<input type="text"/>
Last Name	<input type="text" value="5"/>	Last Name Length	<input type="text"/>
Name Suffix	<input type="text" value="6"/>	Name Suffix Length	<input type="text"/>
Legal Name	<input type="text"/>	Legal Name Length	<input type="text"/>
Preferred Name	<input type="text"/>	Preferred Name Length	<input type="text"/>

Name Display

- **Upcoming Sessions**

98806 - Name, Gender, and Persona Data in Banner 9

Tuesday, March 21 4:45 – 5:45pm

Ellen Jetto, Arthi Chakravarthi, Bill Zimmer

Wrap Up



Implementation Facts

- **4,000 PFNs in first 6 months**
- **Overall positive feedback**
- **No inappropriate names**
- **Identity card to be implemented October 2017**
- **PFN functionality for faculty and staff for future rollout**

Obstacles

- **Not impacting the legal name**
- **Backing and support**
- **Resistance from departments**
- **Multiple changes to smaller systems**

Summary

- **Approval and Support from higher up in chain**
- **Do a complete analysis to understand full impact**
- **Don't be afraid to reach out to many people and departments**
- **Keep it small and straight forward**

Questions & answers



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Thank you

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