Implementing PFN for Student

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Implementing PFN for Student | University of Illinois
March 21, 2017
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

Analysis
Jan 2015 – Aug 2015

Implement
Jan 2016 – Aug 2016
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
Our Peers

Institutions Using PFN

- Yes: 73%
- No: 20%
- Limited Use: 7%

Our Peers
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 RPAAWWRD
Student Self-Service

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

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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.

Submit
Student Self-Service

The University of Illinois at Chicago

Preferred First Name

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.

HELLO
my name is

Matt Chung

[ Edit your Preferred First Name ]

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Student Self-Service

The University of Illinois at Chicago

**Personal Information**  **Registration & Records**  **Account Billing Information**  **Graduation**

**Search**  **Go**

**Select a Term**

Select a term for the associated campus from the pull-down list.

**Select a Term: Spring 2017 - Chicago**

Submit

**RELEASE: 8.7.1**

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Faculty Self-Service

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

Name Display GUANDSP 9.3 (BANRMS1) (1UIUC)

Single Name Rule

Usage Name: DEFAULT
Priority: 98
Active: Yes
Maximum Length: 2000
Error Message

Comments:
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: 1
First Name: 2
Middle Name: 3
Surname Prefix: 4
Last Name: 5
Name Suffix: 5
Legal Name:
Preferred Name:

Name Prefix Length:
First Name Length:
Middle Name Length:
Surname Prefix Length:
Last Name Length:
Name Suffix Length:
Legal Name Length:
Preferred Name Length:
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
Thank you

We want to hear from you—feedback survey
Access session surveys by using the survey widget on the mobile app or by logging into your session schedule builder.

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