GENDER RECOGNITION AND LIVE NAME POLICY

TABLE OF CONTENTS

REVISION HISTORY

Version	Date	Name	Description
	07/14/2023	Bracken Dailey	Initial

INTRODUCTION AND PURPOSE

The purpose of this document is to explain the implementation of the Gender Recognition and Lived Name policy (GRLN) within Banner. This policy implementation at UCR is effective September 9, 2023.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

- Gender Recognition and Lived Name (GRLN) policy - https://policy.ucop.edu/doc/2700693/GRLN
- UCR Gender Recognition and Lived Name Committee website - https://chancellor.ucr.edu/gender-recognition-and-lived-name-committee
- Student facing information on what to expect on campus and how to update their information - https://registrar.ucr.edu/grades-records/information

For the implementation of this policy it focuses on four distinct data areas:

Lived Name: A self-chosen or personal and/or preferred professional name used instead of a legal name.

- All students will have a Lived Name in Banner. This will be stored in the current name field in Banner on SPAIDEN. If a student does not provide a Lived Name the Lived Name will be equal to the student's Legal Name.
- Legal Name will be stored as a separate name type on the Alternate Identification tab on SPAIDEN. All students will have a Legal Name in Banner. Based on job responsibilities, many staff will not have access to Legal Name and therefore, will not see this name type within the Alternate Identification tab.
- **Legal Name is to be protected at all times. Consider the sensitivity of this information to be at the highest level with SSN, Bank account information, Driver's License number, etc. If you have access to or find you become aware of a student's legal name you are expected to maintain confidentiality of that information at all times.**
- Departments who have access to Lived Name will be posted on the Registrar's website for students to be aware - https://registrar.ucr.edu/grades-records/information; in addition, systems that will have Lived Name will be on the committee website for staff/faculty knowledge - https://chancellor.ucr.edu/gender-recognition-and-lived-name-committee
  - o If someone does not have access to Legal name who feels they should, a formal request for access must be submitted to the committee for review.
- Students can update their Lived Name via R'Web self-service at any time.
- Students can update their Legal Name by following the procedures at https://registrar.ucr.edu/grades-records/information

Gender Identity: The gender(s), if any, with which a person identifies. An individual's gender is their gender identity, which can be the same or different from their sex assigned at birth.

- UCR will no longer be collecting binary gender at birth (legal sex) of students.
- Gender Identity will be stored on the Biographical tab on SPAIDEN. The field is labeled Gender Designation.

- Students can update their Gender Identity via R'Web self-service at any time.

Pronouns: A word that can function by itself as a noun phrase and by which an individual wishes to be referred to in order to indicate their gender identity.

- Pronouns will be stored on the Biographical tab on SPAIDEN. The field is labeled Personal Pronoun.
- Students can update their Pronoun via R'Web self-service at any time.
- Systems/Departments that will receive Pronouns from Banner will be posted on the Registrar's website - https://registrar.ucr.edu/grades-records/information

Sexual Orientation: A descriptor for the gender(s) of people with whom a person is interested in a sexual relationship.

- Sexual Orientation is not stored in a field within Banner that staff can view. If you have a business need, you may request a report via ITS to obtain the information you need - https://ucrsupport.service-now.com/ucr_portal?id=sc_cat_item&sys_id=b32c13e20f8527800e36244be1050e85
- Students can update their Sexual Orientation via R'Web self-service at any time.

Students who are also employees on campus, UCPath and Banner are two distinct systems and updates to these personal items must be completed in both systems.

Staff and Faculty:

- If the staff or faculty member has a record in Banner, they may update their name in Banner to a Lived name. This will allow the appropriate display of the name in the Schedule of Classes and Student Profile.
- UCPath and Banner are two distinct systems and therefore, an update to UCPath will not update Banner.

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. All entities who have access to Banner

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, go to R' Space and select the Banner Training icon in order to follow along and practice. Please submit a ticket if you have trouble accessing Banner Training.
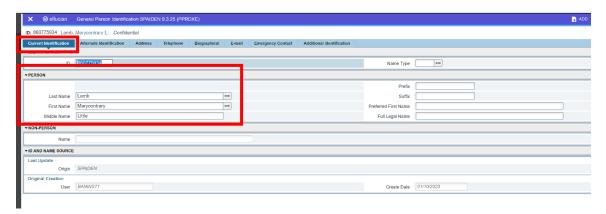
PAGES

The pages listed below are covered in this training.

PAGE	Page Name	Description
SPAIDEN	General Person Identification	Personal Identifiers for students

PROCEDURES

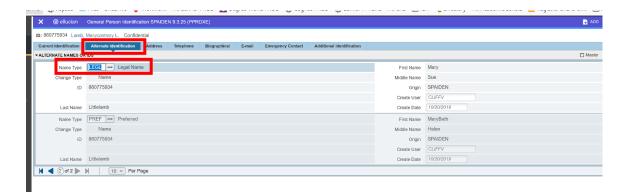## VISUAL SCREENSHOTS OF LOCATION OF INFORMATION

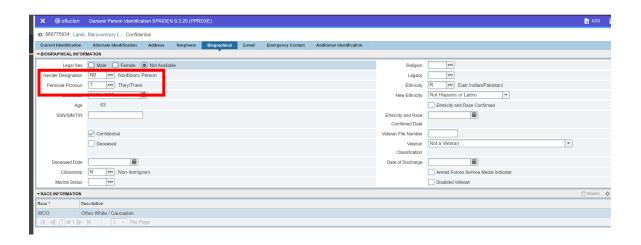All students will have a Lived Name located as the Current Name or Name in Banner.

Legal Name will only show to staff eligible to see legal name for business needs. If you do not have access you will not see that record on the Alternate Identification tab.

If given a Legal Name you will be able to enter the name in Banner and pull the student up but if you do not have a business need for legal name you will no longer be able to see it once the record is identified.

Please Note: for historical purposes we will be maintaining the previous Preferred Name type (PREF) in Banner, but that is NOT the student's Lived Name.

Gender Identify (Gender Designation) and Personal Pronoun is located on the Biographical tab.

GUIDANCE ON BEST PRACTICES FOR USE OF LIVED NAME VS LEGAL NAME

- Stay Generic: "Your student" or "The student"
- Focus and prioritize **other questions** than verifying the **Legal Name of the student** (Course title or subject/number for a specific term, Grade for a course, where transfer work has come from, did they repeat a course? Minor or concentration)
  - o For Housing, Student Business Services and Financial Aid: Focus and prioritize **other questions** than verifying the **Legal Name of the student** for proxies and authorized users (FERPA questions = SID, DOB, Major, passphrase, email, or name if proxy)
- **Take the lead from the proxy or student, using what name they mention. If you are uncertain and you are speaking with someone other than the student, use "The student" and "They".**
- If engaging with multiple people at one time, do a round of introductions. **This allows the student to say their name, correct or clarify.**
- Use **Lived Name** when leaving voicemails or messages for the student on their personal line. Use **"UCR Student"** on other voicemail or messages that are not the students.
- When in doubt of a caller's personal pronouns, use their name or they/them pronouns as a default.
- Getting push-back from the caller about names? Say this: "I understand your concern, please know that the UC system-wide policy now allows **all students** to update a lived name as preference under the GRLN Policy. All legal documentation will still contain their legal name unless updated by the student. I encourage you to speak with your student and clarify what information they have granted access to via their R'Web."
- Be patient with yourself as you navigate the new language for the GRLN Policy. This is new and we are all learning!