



GENDER RECOGNITION & LIVED NAME POLICY

Language Guidance Scripts: Interactions with Proxies & Authorized Users

Note: Billing, Financial Aid, and Housing – All have access to both lived and legal name.

Best Practices (pg 1)

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Best Practices

1. Stay Generic: "Your student" or "The student"
2. 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)
 - 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 of proxy)
3. **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".**
4. If engaging with multiple people at one time, do a round of introductions. **This allows the student to say their name, correct or clarify.**
5. 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.
6. When in doubt of a caller's personal pronouns, use their name or they/them pronouns as a default.
7. Getting push-back from the caller about names? Say this: "I understand your concern, please know that the UC Statewide 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.
8. Be patient with yourself as you navigate the new language for the GRLN Policy. This is new and we are all learning!

Script 1: Communication on the phone

Scenario 1: Student (Authorizing who you are speaking to)

- UCR staff: Hello, thank you for calling, may I please have **your NAME** (LIVED NAME) and **your student SID**?
- UCR staff: Thank you so much. For verification purposes, I am going to ask you a few questions? (**Use questions other than verifying the legal name**)
 - 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

Scenario 2: Parent (Authorized User) - Stay Generic: "Your student" or "The Student."

- UCR staff: Hello, thank you for calling, may I please have **your student's NAME** (LIVED NAME) **and SID**?
- UCR staff: Thank you so much. For verification purposes, I am going to ask you a few questions? (**Use questions other than verifying the students legal name**)
 - The name of the authorized user
 - Birth date of the student
 - The passphrase established by the student.
 - Check if the current date is within the start and end date of the authorization period – are they current?

Scenario 3: Parent (Unauthorized user – cannot confirm their authorization)

- UCR staff: Hello, thank you for calling, may I please have **your student's NAME** (LIVED NAME) **and SID**?
- UCR staff: For verification purposes, I am going to ask you a few questions? (Use questions other than verifying the students legal name)
 - The name of the authorized user
 - Birth date of the student
 - The passphrase established by the student.
 - Check if the current date is within the start and end date of the authorization period – are they current?
- UCR staff: "Thank you, it looks like you are not an authorized user, currently and I am unable to provide any information to you at this time. **The student** will need to resolve this conflict in order to approve the release of information before any further discussions can be made regarding **the student** account."

Scenario 4: Both authorized user and student (when you need clarification on lived name)

- UCR staff: Hello, thank you for calling, may I please have **your student's NAME (LIVED NAME) and SID?**
- Proxy: “Anastacia can you tell this representative what you are having a problem with?”
- UCR staff: “Hello Anastasia, I just want to make sure you are ok with me calling you that or if you go by anything different?”
- Student: “...” **Asking the student will help correct or clarify their name.**

Scenario 5: Voicemails

- Student Number: Use **LIVED NAME** when leaving voicemails or messages for the student on their personal line.
 - “Hello, this message is for (LIVED NAME). This is (UCR STAFF NAME) and I am calling from (UCR OFFICE) ...”
- Authorized User Number: Use **“UCR Student”** on other voicemail or messages that are not the student’s number (when applicable)
 - “Hello, this message is regarding your **“UCR Student.”** This is (UCR STAFF NAME) and I am calling from (UCR OFFICE) ...”

Script 2: Communication via email from UCR Staff or Student Assistants

Scenario 1: Student

- “Dear Student” or “Dear [LIVED NAME]”

Scenario 2: Parent (Authorized User)

- “Dear Authorized User”

Scenario 3: Parent (Unauthorized user – cannot confirm their authorization)

- Dear “Unauthorized User”, Due to the FERPA privacy laws we follow we are unable to give you specific account information without you being authorized by your student. Your student can update your authorization on R’web under “Authorization & Privacy”. Once completed, we will be happy to assist you with your questions.

Script 3: Communication in person

Scenario 1: Student

- UCR Staff: Hello, how can I help you today?
- UCR Student: *states purpose*
- UCR Staff: “Sure I can help with that. First do you **know or have your SID?**”
 - Checks and verifies information.
 - Ask additional questions for verification other than **Legal Name**, if applicable:
 - **LIVED NAME**
 - 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

Scenario 2: Student & Parent (Authorized User)

- Note: If both student and authorized user are seeking information, then let the student take the lead and follow steps from [Scenario 1](#). Then make sure that the other person, is in fact an authorized user. If not, let the student know that they can make changes to proxies by giving other people permission to view your student record information in self-service by logging in to R’Web or via a FERPA release form for departments outside of Housing, Student Business Services and Financial Aid.

Scenario 3: Parent (Authorized User)

- UCR Staff: Hello, how can I help you today?
- UCR Proxy/Authorized User: *states purpose*
- UCR Staff: “Sure I can help with that. First do you know or have **your students NAME & SID?**”
 - Checks and verifies information.
 - Ask additional questions for verification other than **Legal Name**.
 - The name of the authorized user
 - Birth date of the student
 - The passphrase established by the student.
 - Check if the current date is within the start and end date of the authorization period – are they current?

Scenario 4: Parent (Unauthorized user – cannot confirm their authorization)

- UCR Staff: Hello, how can I help you today?

- UCR Unauthorized User: *states purpose*
- UCR Staff: “Sure I can help with that. First do you know or have **your students NAME & SID?**”
- UCR Unauthorized User: *cannot provide information on one or both.*
- UCR Staff: Ok thank you. I will have to ask some additional questions for verification (other than legal name):
 - The name of the authorized user
 - Birth date of the student
 - Address
- UCR Unauthorized User: *does not meet standard for verification.*
- UCR Staff: “Due to the FERPA privacy laws we follow we are unable to give you specific account information without you being authorized by your student. Your student can update your authorization on R’web under “Authorization & Privacy”. If your student is with you today, they can manage this on any free computer on campus that has internet access. Once completed, we will be happy to assist you with your questions.”

Script 4: Communication for push back on the GRLN Policy

- UCR Staff “I understand your concern, please note that the UC Statewide 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.”
- UCR Staff recommendations if they argue:
 - Reiterate that it is a UC System Wide policy. You can refer them to <https://chancellor.ucr.edu/gender-recognition-and-lived-name-committee>
 - Recommend they speak with their student about what they might or might not have access to regarding the students’ records.
 - State that if the name has been restricted you cannot release any information. The student needs to resolve this conflict in approval to release information before any further discussions can be made regarding the student account.
 - State that the “proxies who have been authorized by the student to view Student Business Services, Financial Aid, or Housing information, **log in to Self-Service**. You can access authorized information there.”
 - State that the “proxies who have been authorized by the student to make a payment log in to **Student Account Online**. You can access authorized information there.”

Information: Highlander Orientation Training (PowerPoint for students, parents, and family)

- What is the GRLN Policy?
- What is UCR's commitment to implementing and adhering to the policy?
- What does this policy mean when accessing students records and information?
- What are UCR's best practices for communicating with proxies or authorized users.