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CU I&E Submission: Expediting Name Changes Through Workflow [1]

Submitted By

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Project Description

Changing or updating one's name on campus is a confusing process. Students, faculty or staff must work with several campus offices in order to be recognized by their chosen identities. In the Office of the Registrar, we have worked collaboratively to implement a workflow for updating legal and demographical details. This includes both legal and chosen names, sex/gender markers, citizenship, tribal affiliation, and more. The form is user friendly, and provides targeted information based on the user's campus affiliation and the change taking place. By identifying campus affiliation, we're able to share information with campus partners, such as OIT and HR, without overwhelming our partners with irrelevant information.

In addition to being more user friendly, the workflow sends notifications to relevant departments and documents the change in OnBase. This includes notifications to the International Student & Scholar Services office when citizenship is updated, Health & Wellness for legal name changes, and the Campus College Opportunity Fund representative to ensure no interruptions to COF funding. This resolves several known issues created by the current name change process.

Project Efficiency

The project leverages OnBase's feature-rich functionality and Campus Solutions integration to replace the static PDF form we've used for years. Instead of sending the form and supporting documentation to us by fax or email, users will access the form using SSO which ties submissions to the user and increases PII data security. Additional logic is built into the form to reduce errors or missing information, reducing the need for follow up communications and speeding up the processing time for our office. The form also notifies campus partners of

changes to make the experience seamless for our partners and end users.

Project Inspiration

The inspiration for this project came from recognizing that an operational approach within silos wasn't serving anyone and was creating frustration for our more marginalized communities. Rather than just updating how our office handles this process internally, we saw an opportunity to broaden the scope with a collaborative and multi-phased rollout to better serve the campus as a whole.
Most importantly, this will increase inclusivity for students, faculty, and staff who deserve to be addressed by their proper (chosen) name without the unnecessary runaround of bouncing from one office to the next.

Future Plans

We've already worked with Health and Wellness who will begin taking name changes and sex/gender markers requests to update their records as well. In phase 2 we plan to address HR/HCM updates. There are different requirements for updating HCM depending on whether the employee is Classified vs University Staff so further development is required to successfully integrate this component. Beyond that, I would really like to find a way to integrate functionality to update email addresses and display names when legal name changes are submitted. Additionally, we'll be seeking user feedback to determine if and how we can further improve the new process.

What Makes You Happiest about this Project?

Learning about interconnections of campus departments and systems and knowing that we're improving the experience for everyone on campus.

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