

How to Update Chosen Name

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Effective September 15, 2023, the **Additional Names** page will no longer be available to track an employee's Preferred Name. Instead, Department Human Resources staff can track an employee's Chosen Name by using the new **Chosen First Name** field in the **Modify a Person** page. This solution article provides Department HR teams step-by-step instructions on updating an employee's Chosen Name.

Step 1. To update an employee's Chosen Name, search for the employee on your **Modify a Person** search page.

The screenshot displays the 'Modify a Person' search interface. On the left, a navigation menu includes 'Job Information', 'Personal Information', 'CCSF Review POI Data', 'Modify a Person' (highlighted with a red box), 'Search by National ID', 'CCSF Designee', 'Emergency Contact', 'CCSF Person Checklist', 'CCSF Driver's License Data', 'CCSF Gender Identification', 'Badge', 'CCSF DSW Badge', and 'COVID Vaccination/Test Status'. The main content area is titled 'Personal Data' and contains the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two buttons: 'Find an Existing Value' and 'Add a New Value'. A 'Search Criteria' section is expanded, showing several search fields: 'Empl ID' (with a dropdown set to 'begins with' and an empty input field), 'Name' (with a dropdown set to 'begins with' and an empty input field), 'Last Name' (with a dropdown set to 'begins with' and an empty input field), 'Second Last Name' (with a dropdown set to 'begins with' and an empty input field), 'Alternate Character Name' (with a dropdown set to 'begins with' and an empty input field), and 'Middle Name' (with a dropdown set to 'begins with' and an empty input field). Below these fields are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive'. At the bottom, there is a 'Search' button (highlighted with a red box), a 'Clear' button, and links for 'Basic Search' and 'Save Search Criteria'.

Step 2. Click the + button to add a new effective dated row in the **Name** table.

Job Data

Job Information

Personal Information

Modify a Person

CCSF Review POI Data

Search by National ID

CCSF Designee

Emergency Contact

CCSF Person Checklist

CCSF Driver's License Data

CCSF Gender Identification

Badge

CCSF DSW Badge

Biographical Details | Contact Information | Regional

Jonathan Smith (Jonathan) Person ID 000000

Name 1 of 1 | View All

Effective Date 08/01/2023 + -

Format Type English

Display Name Jonathan Smith (Jonathan) View Name

Biographic Information

Date of Birth 01/01/1980 Years 43 Months 7

Date of Death

Birth Country USA United States

Birth State

Birth Location Waive Data Protection

Biographical History 1 of 1 | View All

Step 3. Click the **Edit Name** button.

Job Data

Job Information

Personal Information

Modify a Person

CCSF Review POI Data

Search by National ID

CCSF Designee

Emergency Contact

CCSF Person Checklist

CCSF Driver's License Data

CCSF Gender Identification

Badge

CCSF DSW Badge

COVID Vaccination/Test Status

Biographical Details | Contact Information | Regional

Jonathan Smith (Jonathan) Person ID 000000

Name 1 of 2 | View All

*Effective Date 08/22/2023 + -

*Format Type English

Display Name Jonathan Smith (Jonathan) Edit Name

Biographic Information

Date of Birth 01/01/1980 Years 43 Months 7

Date of Death

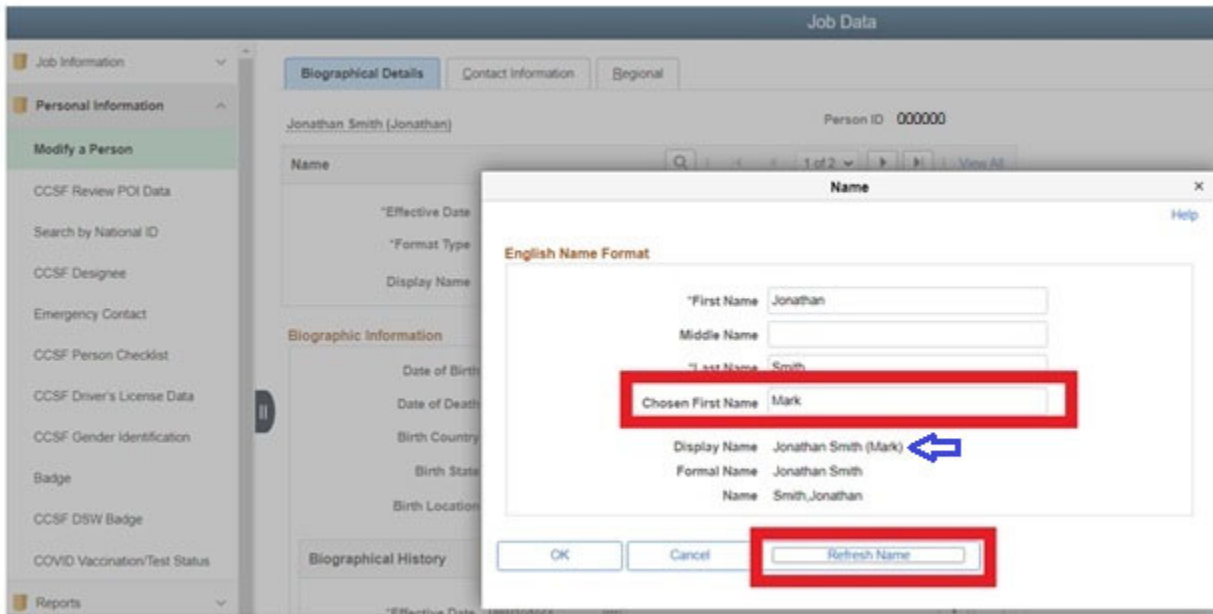
Birth Country USA United States

Birth State

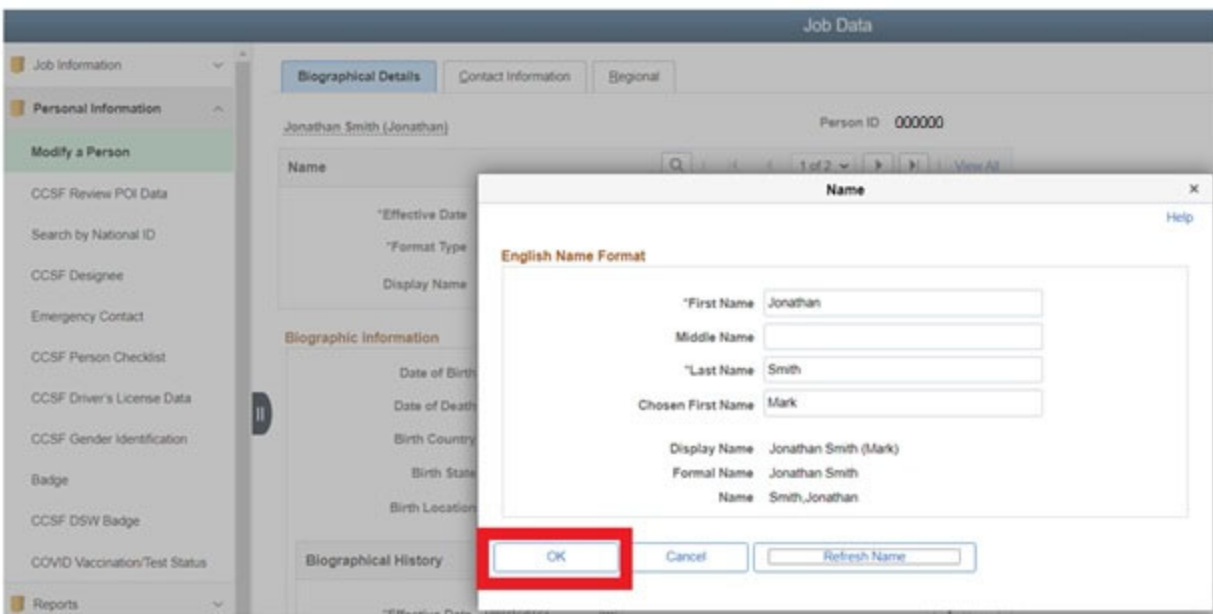
Birth Location Waive Data Protection

Biographical History 1 of 1 | View All

Step 4. Enter the employee's Chosen Name in the **Chosen First Name** field and click the **Refresh Name** button. After refreshing your entry, the **Display Name** provides a preview of your employee's Chosen Name.



Step 5. Click **OK** to save the transaction.



Your employee's Chosen First Name will now appear in parenthesis after their legal name in all SF People & Pay and SF Learning pages. Their Chosen Name will also appear on top of the SF Employee Portal formatted as Chosen First Name and Legal Last Name.

The screenshot displays the 'Job Data' interface for a person's profile. The left sidebar contains navigation options such as 'Job Information', 'Personal Information', and 'Modify a Person'. The main content area is titled 'Biographical Details' and shows the name 'Jonathan Smith (Mark)' in a red-bordered box. Below this, there are fields for 'Effective Date' (08/22/2023), 'Format Type' (English), and 'Display Name' (Jonathan Smith (Mark)) with an 'Edit Name' button. The 'Biographic Information' section includes 'Date of Birth' (01/01/1980), 'Date of Death', 'Birth Country' (USA), 'Birth State', and 'Birth Location'. A 'Waive Data Protection' checkbox is also present.

If an employee wishes to provide a new Chosen Name or update their existing Chosen Name, they must contact your Department HR team to request this change, much in the same way they are required to contact you to update their legal name.

NOTE: The employee's Chosen Name will not be visible in other SF Employee Portal systems and other self-service features related to systems outside of SF People & Pay and SF Learning, e.g., Expenses.

Questions?

Please contact your Department's Client Services Consultant if you have policy questions about tracking Chosen Name.

For other questions, please reach out to the **SF Employee Portal Support Team**

(<https://sfemployeeportalsupport.sfgov.org/support/catalog/items/207>).