Implementing PFN for Student

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University of Illinois

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Disclaimer

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Agenda

1   Project Details

2   Analysis

3   Our Approach
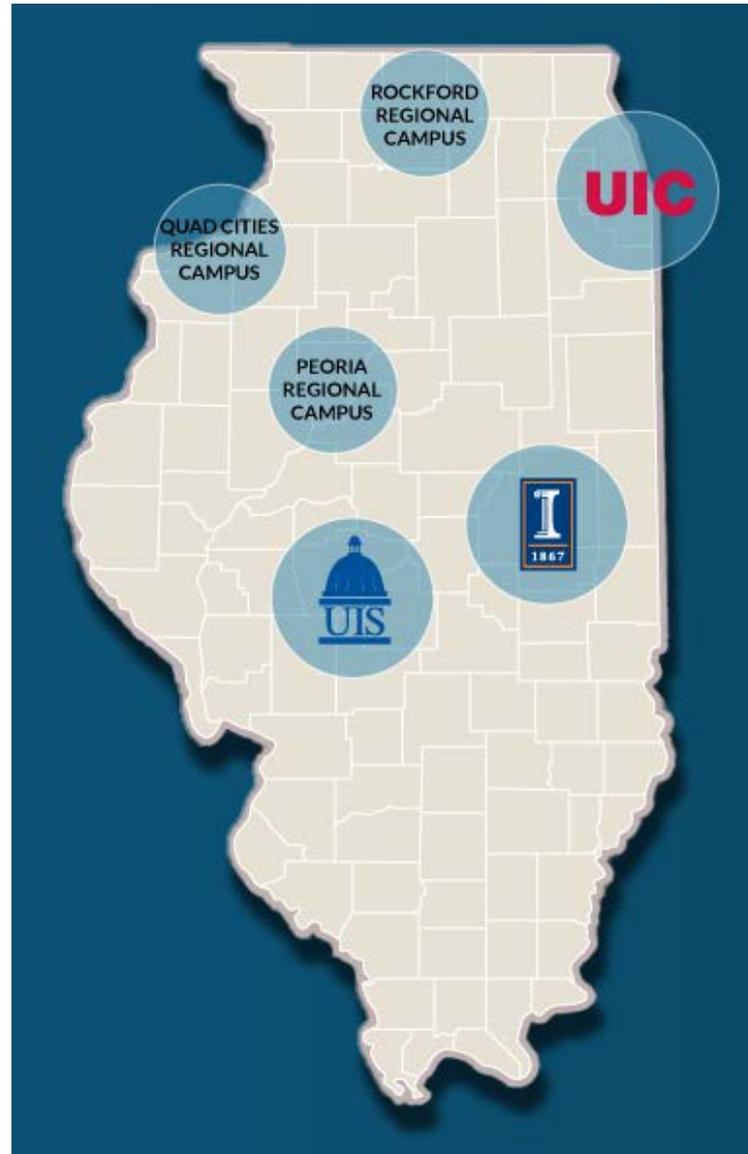
4   Implementation

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**
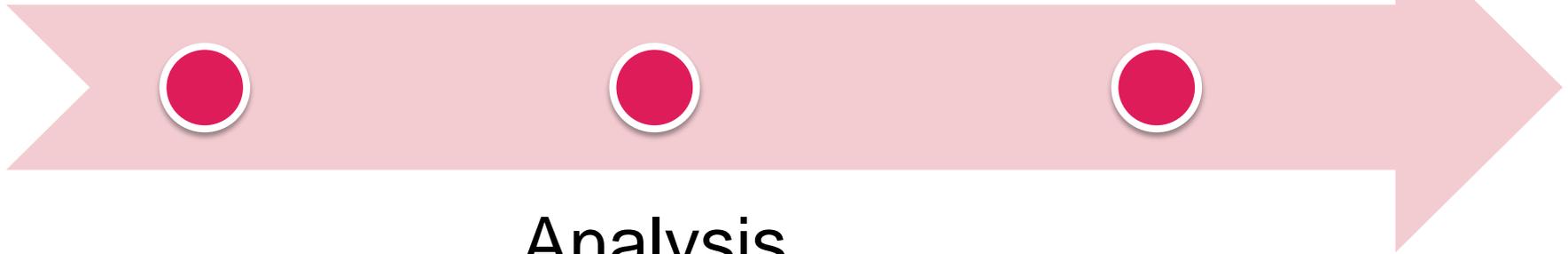
Project Details

Timeline

Support
Oct 2013- June 2014

Implement
Jan 2016 – Aug 2016

Analysis
Jan 2015 – Aug 2015

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
- No
- Limted Use
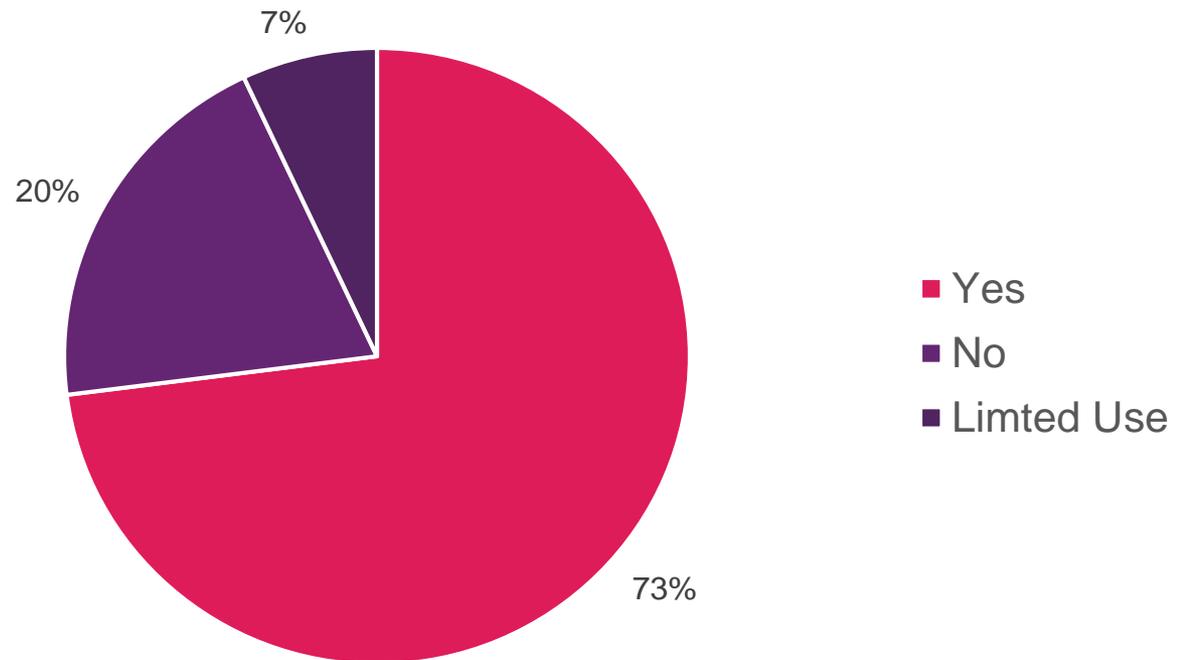
Impacted Systems

- **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 RPAAWRD**

Banner - SPAIDEN

Banner - SPAIDEN

Student Self-Service

Student Self-Service

Student Self-Service

Student Self-Service

Faculty Self-Service

Summary Class List

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

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

- **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

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widget on the mobile app or by logging into
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