Job Aid for Name Change

Description

- This job aid is intended to guide you through the online process for a name change that is initiated by an approved submitter.
- An employee cannot change their name through personal data in Employee Self Service. If they try through self-service it will open a new link which will notify them, they must go through a legal name change process and how to submit the appropriate documentation. The employee must follow the instructions provided in the link to change their name.
- An employee can only change their name while in a Life Event of Marriage or Divorce (after the documentation submitted for the Marital Status change is approved, there will be a subsequent submission of documentation for the Name Change along with a separate approval process). They will follow the Life Event Job Aid for this process.
- An approved submitter can submit a Name Change for an employee at any time by logging into PeopleSoft and clicking on the submit request tile from their landing page.

Key Steps/Activities to be performed as an Employee

1. Employee Logs into PeopleSoft and clicks on the Employee Self Service Personal Data tile from their landing page.

2. Employee selects the Name tab from the left-hand side navigation which will open a new link providing them with instructions with how to change their legal name. The Employee is done at this point as they must contact TSS to continue with a name change.
Link with Instructions to Employee:  https://access.tufts.edu/personal-data-change-legal-name

3. An approved submitter can submit a name change for an employee at any time by logging into PeopleSoft and clicking on the submit request tile from their landing page.
4. The submitter selects the Name Change link that will begin the transaction. A new window will open to allow the submitter to search for an employee.

5. You can search for the employee by name, employee id, position number or department.

6. Based on the search criteria, a list of employees will appear that the submitter has security access to. In the example below, the search was for “Davis” and returned 20 rows.
7. After selecting Mary Davis from the list, the submitter will fill in the information below.
   a. Transaction Date – This is the effective date of the new name.
   b. Enter the new name. In our example we have chosen “Test” as the new last name.

When completed the submitter will click on the SUBMIT button. A window will pop up showing the name has been submitted and is in the approval process.
8. After the transaction is submitted, the approver will receive a message that the transaction was submitted for approval. They can also view the approval workflow chain with a pending status online.

![Submit Requests - TSS](image)

Name Change Approval Chain

All required approvals will appear in the Approval Chain. Upon completion of the Approval Chain, certain roles will be notified. The required approvals and the notified roles will vary based on the type of employee as shown below.

<table>
<thead>
<tr>
<th>Employee Type</th>
<th>Faculty</th>
<th>Staff</th>
<th>Student</th>
<th>Temp</th>
<th>POI</th>
<th>CWR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approvers</td>
<td>TSS Tier 2</td>
<td>TSS Tier 2</td>
<td>TSS Tier 2</td>
<td>TSS Tier 2</td>
<td>TSS Tier 2</td>
<td>TSS Tier 2</td>
</tr>
<tr>
<td>Notified</td>
<td>[none]</td>
<td>[none]</td>
<td>[none]</td>
<td>[none]</td>
<td>[none]</td>
<td>[none]</td>
</tr>
</tbody>
</table>

9. The approver will receive an email that a transaction is waiting to be approved and they will also see the transaction in the pending approvals tile.
10. The approver should then select the transaction from the list. They can review the changes and comments before denying or approving the transaction.

Once the final approver has approved the transaction, the employee’s personal data record will be updated with the new name.
11. The employee will receive a message notifying them that the transaction has been submitted and they will receive a second email once the approval has been made and the personal data has been updated to the database.