

BURRELL COLLEGE OF OSTEOPATHIC MEDICINE

STANDARD OPERATING PROCEDURES

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| Preferred Name | SOP #: GA.024.06 |
| Effective Date | 6.17.2020 |
| Last Revision/Review | 7.14.25 |

1. Purpose

The College recognizes individuals may prefer to use a name different from their legal name to identify themselves to faculty, staff, and students. Preferred names covers first and middle names; surnames may only be changed with a legal name change. Similarly, individuals may identify a preferred gender or neutral pronoun indicating how the individual would like to be referred to by others.

Preferred names are not for the purpose of misrepresentation (inappropriate names or using the process to avoid a legal obligation) nor for other misconduct. The College reserves the right to deny use of, or to remove a preferred name if not consistent with appropriate use.

2. Related Policy/Authority

Policy B1040 Non-Discrimination

Policy B1043 Title IX

Policy B9500 Title IV Compliance

3. Faculty/Staff Responsibilities

Office of the Registrar

Office of Human Resources

4. Definitions/Abbreviations

5. Procedural Steps

A. Legal Name

- a. Use of the legal name (the name that appears on your passport, driver's license, birth certificate or U.S. Social Security card) required for:
 - i. Students
 1. admissions
 2. official student academic records held in the Office of the Registrar
 3. transcripts
 4. federal, state, and institutional student financial aid
 5. student billing and the student account invoice (including e-bills)
 6. federal requests for information
 7. disciplinary action
 8. background checks/fingerprinting
 9. immunization records
 10. other legally binding requirements (COMLEX, VSLO, National Student Clearinghouse, New Innovations, etc.)
 11. Clinical setting identification inclusive of white coat.
 - ii. Employees and Contractors

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1. Financial, medical, and law enforcement documents
 2. Transcripts and diplomas
 3. W-2 forms, I-9 forms, and payroll documents
 4. Visa/immigration documents
 5. Information provided to airlines for issuing tickets
 6. Employment related documents and personnel files
 7. Background check documents
 8. Benefit and/or insurance documents
 9. Sponsored Research or Research Protections
- b. Certain College personnel may have access to your legal name by nature of their work.
- c. A student's legal name will appear on a diploma. Students may opt for a variation of their legal name as follows:
- i. option to include a middle name.
 - ii. option to modify legal name for proper capitalization or proper accentuation of the name.
 - iii. option to include or exclude suffixes.
 - iv. If a student has a legal name change, it is possible to be issued a replacement diploma, however, the original diploma must be returned to the Office of the Registrar and the student will incur a cost.
- B. Preferred Name
- a. Students may update or delete the use of a preferred name via the Office of the Registrar. Employees may update or delete the use of a preferred name via the Office of Human Resources. Please recognize that certain programs may limit the use of preferred names.
 - b. The preferred name will be used in lieu of the legal name wherever the legal name is not required, such as:
 - i. learning management system
 - ii. class rosters
 - iii. advisee lists
 - iv. email system (the College can update the "display name", however, the email address does not change)
 - v. College ID Card – in order to obtain an ID card with a preferred name, the old ID card with the legal name must be turned in to the Office of IT.
 - vi. Directory -unless the student has opted out of the directory (following is the link to the Registrar's form for opting out of directory information:
<https://burrell.edu/prevent-disclosure-information/>)
 - vii. Employees may request their preferred name for the directory via the Office of Human Resources.
 - c. Use of Preferred Name
 - i. Wherever possible, use the preferred name. This includes casual conversation, email communication.
 - ii. If an employee has a reason to access a student's legal name, the information will be treated as confidential data.
 - iii. If someone does not want the preferred name to be used on a formal communication such as a letter of recommendation, the individual should privately ask for it to not be used.

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C. Preferred Pronoun

- a. Students and employees may indicate their preferred pronoun through their communications with other students and employees. Employees, students and other members of the College community will respect such use of a preferred name and pronoun, in addition to respecting the privacy of individuals concerning such use.
- b. Preferred pronouns may be
 - i. He/him/himself
 - ii. She/her/herself
 - iii. They/them/themselves
 - iv. Ze/ Zir/Zirself (also spelled xe/xir/xerself and pronounced “zee”)
- c. If students and employees do not indicate a preferred pronoun, then the pronoun associated with their legal sex will be assumed.
- d. Use of Preferred Pronoun
 - i. It is okay to ask someone what their preferred pronoun is.
 - ii. If a mistake is made, make a correction and try not to make the mistake again.

6. Reports/Charts/Forms/Attachments/Cross References

SOP RR.014 Name Change

7. Maintenance

Annually

8. Signature

Signatures on File

7.14.25

Department Head of Institutional Effectiveness

Date

9. Distribution List

Internal/External

10. Revision History

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| Revision Date | Subsection # | Summary of Changes | New/Cancellation/Replacement Procedure? (if applicable) | Approval Date |
|---------------|--------------|--|---|---------------|
| 5.4.2022 | 5 | Added New Innovations as a program where the preferred name cannot be used. | | 5.4.2022 |
| 5.3.2023 | 5.B | Updated link to Prevent Disclosure Form | | 5.16.2023 |
| 4.12.2024 | All | Updated to include employees and moved from Registrar (RR) to General Administration (GA) | | 4.12.2024 |
| 7.10.2024 | 5 | Added clinical setting identification | | 7.10.24 |
| 7.31.24 | 5A. | Removed the line that said exam software. Updated the revision number to be GA.024.05 consistent with the above revisions. | | 7.31.24 |
| 7.14.25 | 5 | Updated email information under preferred name for clarification. | | 7.14.2025 |