Preferred First Name - Pronoun Prosposed Project Plan

Supporting Tasks to be Competed/Tools Developed			

Task/Tool Item	Status	Proposed Target for Completion	Comments
Policy Related Tasks			
Finalize Policy	Interim Approved		Need a policy with its rules in place to work from for scoping effort and timelines
Determine how clarifications/issues will be resolved/addressed - responsible entity for decisions/issues	In Process		
Frequency for changing / updating preferred name	Complete		This is established in the policy as 180 days
Who will review/deal with inappropriate preferred names	In Process		
Communication(s) to campus regarding new policy	Complete		
Web Resources / Related Tasks			
Informational Web pages need to be developed		Aug 31	
Work with appropriate offices to ensure links to related/supporting web based documentation is completed (and vice versa)	In Process	Sep 14	Need existing documentation to be updated to reflect this new policy and procedures and need to ensure new documentation properly ties in with existing documentation of related items
Banner Related Tasks			
SSB Preferred First Name Maintenance page developed	Complete	May 31	
SSB Preferred Gender Pronoun Maintenance page developed	Complete	May 31	
Setup code tables to support Banner 9 tools for preferred name/pronoun	In Planning	Fall 2018	
Determine how to get Banner 9 FGE to display preferred name		Fall 2018	
Determine how to get Banner 9 Registration to display preferred name		Fall 2018	
Determine how to get Banner 9 Advisor to display preferred name		Fall 2018	
Determine how to get Banner 9 Employee Dashboard to display preferred name		Fall 2018	
Determine if and how to update display name in TruView	Complete	Jul 31	
Modifications to processes/reports/SSB Pages:			
Identify programs building feed data files for integration to other systems and processes that need to be modified for phase 1 implementation	Complete	May 31	Review feed programs and make a list of those that need modifications as appropriate (switch first name to preferred first name, add preferred first name field, etc.). Additional feed programs will be added to this as we move forward.
Update programs building feed data files for integration to other systems and processes identified to be modified for phase 1 implementation	Complete	Jul 31	Update those feed programs as appropriate (switch first name to preferred first name, add preferred first name field, etc.). Additional feed programs may be added to this as we move forward.
Identify reports that need to be modified for phase 1 implementation	Complete	May 31	Review reports and make a list of those that will need modifications as appropriate (switch first name to preferred first name, add preferred first name field, etc.). Additional reports will be added to this as we move forward.
Update reports identified to be modified for phase 1 implementation	Complete	Jul 31	Update those reports as appropriate (switch first name to preferred first name, add preferred first name field, etc.). Additional reports will be added to this as we move forward.
Identify Banner Self-Service pages that need to be modified for phase 1 implementation	Complete	June 8	Review SSB pages and make a list of those that need modifications as appropriate (switch first name to preferred first name, add preferred first name field, etc.). Additional SSB pages will be added to this as we move forward.
Update Self-Service pages that need to be modified for phase 1 implementation	Complete	Jul 31	Update those SSB pages as appropriate (switch first name to preferred first name, add preferred first name field, etc.). Additional SSB pages will be added to this as we move forward.
ID Related Tasks			
Determine how to get preferred name added to ID system	Complete	May 31	
Complete a prototype of each ID type with preferred name on front and legal name on back	Complete	May 31	Built a proof of concept for each ID type. For sure need student and faculty/staff, possibly other ID types as well.

Display preferred names if they exist on front of ID and legal name if no preferred name exists; legal name is on back	Complete	May 31	
NOTE: Current assumption is that the new Fall 2018 students will have their IDs printed using this new template.			

Systems/Processes/Reports Using Preferred Name - Summary **Student updates: Faculty/instructors/employees will be focus for fall (list coming soon)**

Form/Report/SSB Page	Status	Proposed Target for Completion	Comments
Registrar			
Banner Advisee Lists	In Process	Aug 31	
Banner Class Lists/Rosters	Complete	Jul 31	
Faculty Grade Entry		TBD	Banner 9 Application (will need to determine effort to update)
Student Self Service Profile		TBD	Banner 9 Application (Recommended for implementation - not scheduled yet)
Feeds			
ID System	Complete	May 31	Will contain both preferred (on front) and legal (on back)
TruView	Complete	May 31	Greg's team will make this change; Have code ready
Truman online Directory	Complete	May 30	
Email Display Name - Student	Complete	May 30	
Email Display Name - Employee	Complete	May 30	
Blackboard	Complete	Jul 31	
DegreeWorks	Complete	May 30	
Conduct System	Complete	Jul 31	Will contain both preferred and legal name
Library (MOBIUS)	Complete	Jul 31	
Rec Center System	Complete	May 30	Student are complete
Food Service - Meal Plan data files	TBD	Jul 31	
Recruitment/Admission - DegreeSeeking			Slate System
Applications/Communications	Complete		
Residence Life			StarRez System
Housing Portal/Roommate Selection	Complete		
Housing Lists/Reporting	Complete		
Advancement			Banner
Alumni Relationship Communications/Interactions	Complete		Processes are in place for Advancement to code preferred names for alumni/donor communications/interactions

Systems/Processes/Reports Using Legal Name - Summary

(See detail section for specific TruView links, reports, etc. with these updates)

Department	Form/Report/SSB Page
Business Office - Payroll	All payroll systems and reports, including
	Employee Employment Verification
	Student Employment Verification (eVerify)
Business Office - Student Accounts	Student bill payment (TouchNet paypath),
Business Office - Student Loans	All loan systems and reports, including
Financial Aid	All financial aid documentation and system
Health Records	Student Health Records system
Human Resources	IRS Forms
	MOSERS, Cafeteria Plan, CARO, CURP, Health Risk Appraisal, Shared Leave Pool)
	Onboarding (Background Check
	Leave Report
International Services	SEVIS
Provost's Office	Dean's List, Probation/Suspension
Registrar's Office	Transcripts,
Provost's Office	Dean's List, Probation/Suspension

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Systems/Processes/Reports Using Preferred Name - Detail			

Form/Report/SSB Page	Status	Proposed Target for Completion	Comments
Registrar			
Banner Advisee Lists			
Banner SSB 'Detail Advisee List with Photo'	In Process	Aug 31	Note: This is the Truman version of the advisee list.
Banner SSB 'Summary Advisee List with Photo'	In Process	Aug 31	Note: This is the Truman version of the advisee list in summary form.
Banner SSB 'Detail Advisee List'	In Process	Aug 31	Note: This is the Banner delivered version of the advisee list. This modification will have to be reviewed and possibly reprogrammed each time Ellucian delivers updates to this module.
Banner SSB 'Summary Advisee List'	In Process	Aug 31	Note: This is the Banner delivered version of the advisee list. This modification will have to be reviewed and possibly reprogrammed each time Ellucian delivers updates to this module.
Banner Advisee List by Advisor Report SWRI101	In Process	Aug 31	
Banner Class Lists/Rosters			
Banner SSB 'Detailed Class List w/ Photo'	Complete	May 31	Note: This is the Truman version of the detailed class list.
Banner SSB 'Summary Class List w/ Photo'	Complete	May 31	Note: This is the Truman version of the summary class list.
Banner SSB 'Detailed Class List'	Complete	Aug 21	Note: This is the Banner delivered version of the detailed class list. This modification will have to be reviewed and possibly reprogrammed each time Ellucian delivers updates to this module.
Banner SSB 'Summary Class List'	Complete	Aug 21	Note: This is the Banner delivered version of the summary class list. This modification will have to be reviewed and possibly reprogrammed each time Ellucian delivers updates to this module.
Banner 8 Student Information "Card" (linked to by clicking on student name)	Complete	Aug 21	Note: This is the Banner delivered information page. This modification will have to be reviewed and possibly reprogrammed each time Ellucian delivers updates to this module.
Banner Class Roster Report SWRSLST	In Process	Aug 31	Note: This is the Truman version of the detailed class list report. Banner delivered SFRSLST report will have NO Truman customizations including pronoun.
Faculty Grade Entry		TBD	Banner 9 Application (will need to determine effort to update)
Student Self Service Profile		TBD	Banner 9 Application (Recommended for implementation - not scheduled yet)