Preferred First Name – Personal Pronoun Timeline

| Supporting Tasks to be Competed/Tools Developed | | NOTE: Phase 1 pertains to the implementation of preferred name; Phase 2 pertains to the implementation of pronoun |

Task/Tool Item	Status	Proposed Target for Completion	Comments
Policy Related Tasks			
Finalize Policy – Phase 1	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	Complete		Registrar's Office: Students; HR Faculty/Staff
Communication(s) to campus regarding new policy – Phase 1	Complete		
Finalize language/terminology to be used for referencing pronoun	In Process	Fall 2022	
Review & Update Policy for Phase 2 implementation (pronoun)	In Process	Fall 2022	
Communication(s) to campus regarding updated policy – Phase 2	Planning	Fall 2022	
Web Resources / Related Tasks			
Informational Web pages need to be developed – Phase 1 (https://preferred.truman.edu/)	Complete	Aug 31. 2018	
Work with appropriate offices to ensure links to related/supporting web based documentation is completed (and vice versa)	Complete	Sep 14, 2018	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
Update Informational Web Pages with updates for pronoun implementation	In Process	Fall 2022	
Banner Related Tasks for Phase 1 – Preferred First Name			
SSB Preferred First Name Maintenance page developed	Complete	May 31, 2018	
Setup code tables to support Banner 9 tools for preferred name	Complete	August 2018	
Determine how to get Banner 9 FGE to display preferred name	Complete	August 2022	
Determine how to get Banner 9 Registration to display preferred name	Complete	Fall 2020	
Determine how to get Banner 9 Advisor to display preferred name	Complete	Fall 2020	
Determine how to get Banner 9 Employee Dashboard to display preferred name	On Hold		Implementation has not started.
Determine if and how to update display name in TruView	Complete	Jul 31, 2018	
Modifications to processes/reports/SSB Pages for Phase 1 – Preferred First Name			
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, 2018	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, 2018	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.

Preferred First Name – Personal Pronoun Timeline

			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.
Identify reports that need to be modified for phase 1 implementation	Complete	May 31, 2018	
Update reports identified to be modified for phase 1 implementation	Complete	Jul 31, 2018	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, 2018	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, 2018	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 for Phase 1 – Preferred First Name			
Determine how to get preferred name added to ID system	Complete	May 31, 2018	
Complete a prototype of each ID type with preferred name on front and legal name on back	Complete	May 31, 2018	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, 2018	
NOTE: Current assumption is that the new Fall 2018 students will have their IDs printed using this new template.			
Banner Related Tasks for Phase 2 – Personal Pronoun			
Setup code tables for personal pronoun (gtvpprn)	In Process	Fall 2022	Need final list of codes
SSB Preferred Gender Pronoun Maintenance page developed	Complete	August 12, 2022	Need verbiage for page
Add new link to SSB Preferred Gender Pronoun Maintenance	Planning	Fall 2022	Will be added to Personal Information menu
Modifications to processes/reports/SSB Pages for Phase 2 – Personal Pronoun			
Setup code tables for personal pronoun (GTVPPRN)	In Process	Fall 2022	
Identify where personal pronoun will appear for students			This will result in a list of modifications or new reporting to be developed
Identify where personal pronoun will appear for faculty and staff			This will result in a list of modifications or new reporting to be developed
Identify Data Custodian for student pronoun data			
Identify Data Custodian for faculty and staff pronoun data			

Systems/Processes/Reports Using Preferred Name - Summary   **Student updates: Faculty/instructors/employees will be focus for fall 2018**

Form/Report/SSB Page	Status	Proposed Target for Completion	Comments
Registrar			
Banner Advisee Lists – Banner 8 Self Service	Complete	Aug 31, 2018	
Banner Class Lists/Rosters – Banner 8 Self Service	Complete	Jul 31, 2018	
Faculty Grade Entry- Banner 9 Self Service	Complete	August 16, 2022	Banner 9 Application
Student Self Service Profile – Banner 9 Self Service	Complete	Fall 2022	Banner 9 Application

Preferred First Name – Personal Pronoun Timeline

Feeds				
ID System	Complete	May 31, 2018	Will contain both preferred (on front) and legal (on back)	
TruView	Complete	May 31, 2018		
Truman online Directory	Complete	May 30, 2018		
Email Display Name - Student	Complete	May 30, 2018		
Email Display Name - Employee	Complete	May 30, 2018		
Blackboard	Complete	Jul 31, 2018		
DegreeWorks	Complete	May 30, 2018		
Conduct System	Complete	Jul 31, 2018	Will contain both preferred and legal name	
Library (MOBIUS)	Complete	Jul 31, 2018		
Rec Center System	Complete	May 30, 2018	Student are complete	
Food Service - Meal Plan data files	Complete	Jul 31, 2018		
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, Benefits (Benefit Platform, Med-Pay
	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,

Preferred First Name – Personal Pronoun Timeline

Provost's Office	Dean's List, Probation/Suspension

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'	Complete	Aug 31, 2018	Note: This is the Truman version of the advisee list.
Banner SSB 'Summary Advisee List with Photo'	Complete	Aug 31, 2018	Note: This is the Truman version of the advisee list in summary form.
Banner SSB 'Detail Advisee List'	Complete	Aug 31, 2018	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'	Complete	Aug 31, 2018	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	Complete	Aug 31, 2018	
Banner Class Lists/Rosters			
Banner SSB 'Detailed Class List w/ Photo'	Complete	May 31, 2018	Note: This is the Truman version of the detailed class list.
Banner SSB 'Summary Class List w/ Photo'	Complete	May 31, 2018	Note: This is the Truman version of the summary class list.
Banner SSB 'Detailed Class List'	Complete	Aug 21, 2018	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, 2018	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, 2018	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	Complete	Aug 31, 2018	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	Complete	Aug 16, 2011	Banner 9 Application
Student Self Service Profile	Complete	Fall 2020	Banner 9 Application