



NAME CHANGE PROCEDURE (HUM-P004)

Clarksville-Montgomery County School System

1.0 SCOPE:

- 1.1 This procedure outlines the process for changing an employee's name.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1 Human Resources Administrative Assistant or designee
- 2.2 Technology Systems Administrators
- 2.3 Benefits Staff
- 2.4 Payroll Officers

3.0 APPROVAL AUTHORITY:

- 3.1 Human Resources Director

4.0 DEFINITIONS:

- 4.1 None.

5.0 PROCEDURE:

- 5.1 Employee announces a name change to Human Resources.
- 5.2 Human Resources staff determines if employee has obtained a new Social Security card.
 - 5.2.1 If employee does not have a new Social Security card, the employee is instructed to obtain one from the Social Security Administration.
 - 5.2.2 If employee has a new Social Security card, the MUNIS Employee Master File is changed to reflect the name change. The employee's prior name is added to the Prior Name field of the Master File under the Addresses tab.
 - 5.2.3 New Social Security card is scanned and attached to the employee Docuphase file, noting the name change and date the change was made.
- 5.3 HR Staff issues employee new ID Badge with new name.
- 5.4 HR Staff corrects employee physical personnel file if applicable.
- 5.5 HR Staff sends an e-mail to Technology Department, Benefits, Payroll and other involved personnel of the name change (old name and new name) of employee for necessary changes.
 - 5.5.1 The employee is directed to the Benefits office for any beneficiary changes if needed.



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- 5.5.2 If the employee is certified or an administrator, the employee is directed to the TNCompass website to change their name on their licensure if needed.
- 5.5.3 The name change is recorded on the Blue Cross/Blue Shield website.
- 5.5.4 Blue Cross/Blue Shield issues new Identification Cards to the employee.
- 5.6 HR Staff notes the name change on the applicable HR Name Changes spreadsheet for tracking purposes.

6.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Social Security Card (copy)	Employee Master File/Docuphase	Indefinitely	Permanent	Secured Building

7.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
9/18/03		Initial Release
7/11/06	A	Updates to procedure and flowchart to reflect MUNIS implementation
6/25/09	B	Add new 5.6, update flowchart.
11/26/12	C	Update terminology and process.
6/12/14	D	Correct word in 5.3.1 to decree; update logo
10/30/15	E	Removed 5.3 and deleted associated documents.
6/11/19	F	5.2.3, replaced "master" with "Docuphase". 5.4, added "if applicable".
7/2/20	G	Update responsibility and 5.2. Added 5.5.
6/3/21	H	Updated responsibility and added steps to 5.5. Added a step to add the prior name for the employee in Munis. Minor wording changes throughout.
6/13/23	I	Notes name change on spreadsheet in 5.6.

8.0 FLOWCHART:

- 8.1 A flowchart detailing this process can be found below.

***** End of Procedure *****



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