

Quick Guide: Change My Preferred Name in Workday

Audience: employee (self-service), student worker (self-service)

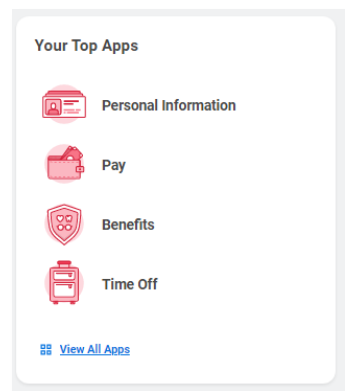
Introduction

The purpose of this quick guide is to detail the steps to change a preferred name in Workday. This process will change the way an employee's name is displayed in Workday. It does not legally change a name for benefits or payroll purposes. To change a legal name in Workday, reference the [Change Legal Name Quick Guide \[pdf\]](#). The preferred name in Workday is shared with some other CMU systems, including the CMU Directory.

Note: Students will use S3 to make preferred name changes.

Workday Steps

1. From the [Workday homepage](#), click the **Personal Information** worklet in the Your Top Apps section. (Click **View All Apps** if it is missing).
2. The **Personal Information** screen displays. In the **Change** section, click on **Preferred Name**.
3. The **Change My Preferred Name** page is displayed.
 - a. Uncheck the **Use Legal Name as Preferred Name** checkbox.
 - i. The **First Name**, **Middle Name**, **Last Name** and **Suffix** fields default from your **Legal Name**. When deselecting this checkbox, all fields become editable.
 - b. Complete the fields below:
 - i. **Country (required):** Enter a country or select the appropriate country from the drop-down list. **Note:** Changing the country changes what fields are available for you to enter your name.
 - ii. **First Name (required):** Enter a preferred first name, if different from legal first name.
 - iii. **Middle Name:** Enter a preferred middle name, if different from legal middle name. If you prefer that a middle name is not displayed, leave this field blank.
 - iv. **Last Name (required):** Enter a preferred last name, if different from legal last name.
 - v. **Suffix:** Select the appropriate suffix from the drop-down list.
 - vi. **Enter Your Comment:** Enter comments if applicable. **Note:** Comments are viewable by administrative users.
 - c. Click **Submit**.
 - d. The **Submitted Completion** page is displayed. Click **Done**.
 - e. On the Workday homepage, click your name and then select **Sign Out**.
 - f. Sign back into Workday.
 - g. On the Workday homepage, view the updated name in the top left corner.

A screenshot of the 'Change My Preferred Name' form. At the top, there is a checkbox labeled 'Use Legal Name As Preferred Name' which is unchecked. Below it is a 'Country' dropdown menu with 'United States of America' selected. The form contains four input fields: 'First Name' (containing 'Andrew'), 'Middle Name' (empty), 'Last Name' (containing 'Carnegie'), and 'Suffix' (empty). At the bottom, there is a text area for 'enter your comment' and three buttons: 'Submit' (orange), 'Save for Later' (grey), and 'Cancel' (grey).