**OSC Bulletin – Display Usual Names in Most Screens and Reports**

The purpose of this bulletin is **to solicit feedback on the proposed change** to resolve issues with the visibility of students’ usual names in MyEducation BC. The proposed change has been developed by the Service Management Council’s Priorities Task Force in consultation with others in the community.

Please submit your feedback or concerns about the proposed approach to Ian Larsson (Ian.Larsson@gov.bc.ca) or Judy Smith (Judy.L.Smith@gov.bc.ca) by **June 21, 2016**.

**Issue**

Currently, many of the screens and reports in MyEducation BC, including those most often used by school teachers and administrators, only display student legal names. Often students use names other than their legal name – e.g. international students, transgendered students. BC schools require that student usual names be displayed in most screens and reports in MyEducation BC, especially in all attendance screens, seating charts, class lists, gradebooks and associated reports that school teachers and administrators refer to daily.

The data in these screens and reports are drawn from a calculated name field. At present schools cannot change the display to show usual names.

**Summary of Resolution**

The Operations and Standards Committee and Task Force have endorsed a recommendation that we reconfigure the calculated name field to use and display usual names.

The proposed reconfiguration will change screens and reports that use the calculated field throughout the application:

* **Priority attendance screens and reports will display usual names**.
* General Data Extracts will return the same results they return today.
* The proposed change will result in the usual names being displayed twice if school districts have modified standard field sets and reports to add usual names.
* Some pop-ups and sub-menus will still display legal names. Changing those items is out of scope for this project.
* Both legal and usual names for staff and contacts will be displayed.

**Detailed description of issue and recommended approach for resolution**

**Issue**

The *Name* field is a calculated field which consists of the data within *Legal First Name* and the *Legal Last Name* fields. This *Name* field is used on many screens and reports throughout MyEducation BC, which creates an issue for students who do not use their legal name or who prefer to be addressed by their usual name. The *Usual First Name* and *Usual Last Name* fieldswere added to MyEducation BC to address this problem; however the calculated *Name* field uses data from the *Legal First Name* and the *Legal Last Name* fields*.*

**Proposed Solution**

We are recommending that the calculated *Name* fieldbe changed so the *Usual First Name* and the *Usual Last Name* information populate the *Name* field throughout the application.

There is no requirement to use legal names for staff, parents, and contacts. However, because the *Name* field is generated the same way for everyone, the *Name* for these groups is also currently populated with *Legal First Name/Legal Last Name* data. The proposed change will impact the *Name* field for **students, staff, parents, and contacts**.

The following table describes the current behaviour of the system, and the proposal:

| **Current Behavior** | **Proposal** |
| --- | --- |
| *Name* calculated field consists of the data in the *person.lastName*, *person.firstName* database fields (in which the legal names are stored) | Change the *Name* calculated value to consist of the data in the *Usual Last Name, Usual First Name* fields |
| Some usual name fields are blank | Update and run a script to populate *Usual First Name* and *Usual Last Name* with the person’s legal names for those cases where the *Usual First Name* and *Usual Last Name* values are blank |
| Staff Template - Staff List – DetailsDoes not display the person’s usual name | Staff Template - Staff List – Details * Add *Usual First Name* and *Usual Last Name* to this template
* Make *Usual First Name* and *Usual Last Name* required data
 |
| Student Template – Contact ST – Details Does not display the person’s usual name | Student Template – Contact ST – Details * Add *Usual First Name* and *Usual Last Name* to this template
* Make *Usual First Name* and *Usual Last Name* required data
 |
| Usual name fields are populated manually | Populate *Usual First Name* and *Usual Last Name* UDFs automatically when *Legal Last Name* and *Legal First Name* are entered.Provide the ability for the user to edit usual and legal names. |

**Impacts**

A reconfiguration of “Person Name View” to calculate and display names from the usual name fields will change screens and reports that use the calculated field.

* Priority attendance screens and reports will display usual names.
* General Data Extracts will return the same results they return today.
* The proposed change will result in the usual names being displayed twice if school districts have modified standard field sets and reports to add usual names.
* Some pop-ups and sub-menus will still display legal names. Changing those items is out of scope for this project.
* Both legal and usual names for staff and contacts will be displayed.
	+ A script will populate usual names from legal names if the usual name field is blank.
	+ Software will be developed to automatically populate legal and usual name fields with a single entry.

**Benefit of implementing the change**

Teachers and school clerical staff will have visibility to students’ usual names on most screens and lists used by teachers and clerical staff. The change will reduce the potential for students being addressed with a name they do not, or prefer not to use.

The proposed reconfiguration approach will be faster, less expensive and less risky than making code changes to each of the screens and reports of interest. Moreover, some of the key attendance screens are part of the core code of Aspen and therefore, enhancement decisions are subject to the discretion of Follett. A BC custom deviation from the core product is not in the best long term interest of the Province or the school districts.

**Impact of not implementing the change**

Students’ legal names would continue to appear on most screens and lists used by teachers and school clerical staff which may be inappropriate in some circumstances (e.g. in family breakups, confidential students). Additionally, students may also be addressed incorrectly.

**About the Operation and Standards Committee**

The Operations and Standards Committee is a standing advisory committee of the Service Management Council that provides recommendations to the SMC Executive Committee and advice to the MyEducation BC Team regarding the standardization of business practices, common operational procedures, schedules, security and privacy procedures, software configuration, and coding within MyEducation BC.