

Change Legal or Preferred Name

31 Steps [View most recent version](#) 

Created by
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Dec 03, 2024

Last Updated
Dec 04, 2024

Login to your workday account

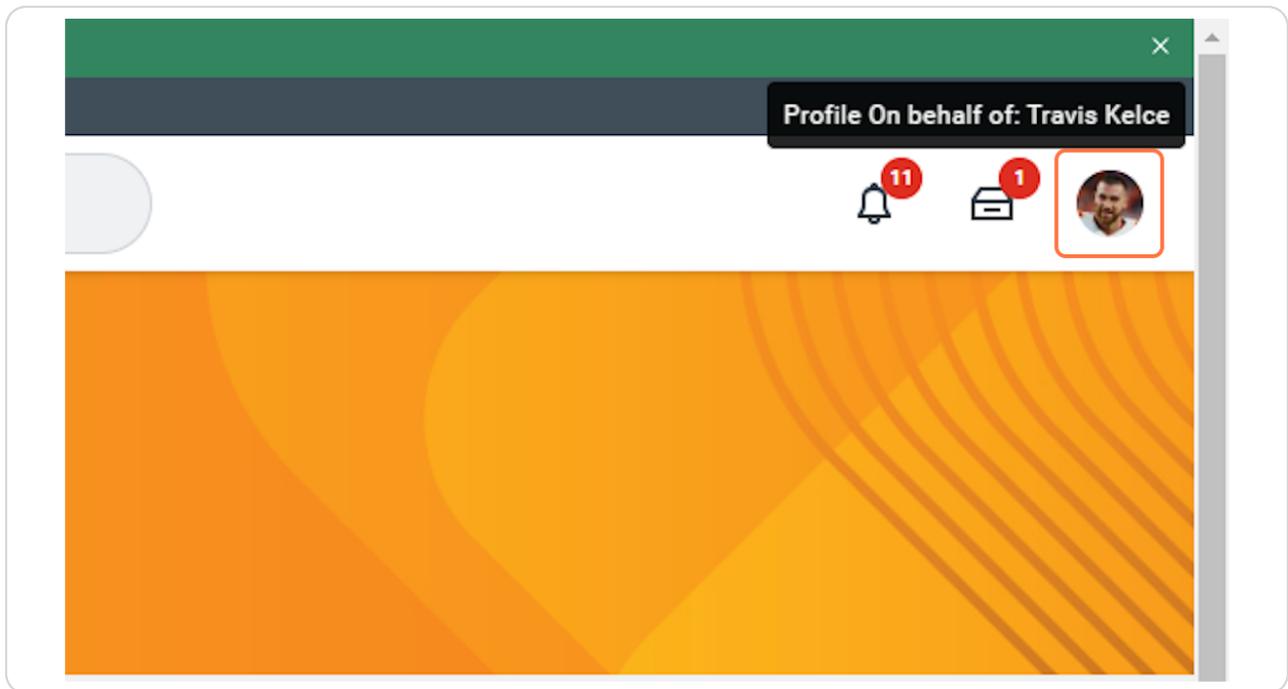
0 Steps [↗](#)

Review current names

4 Steps

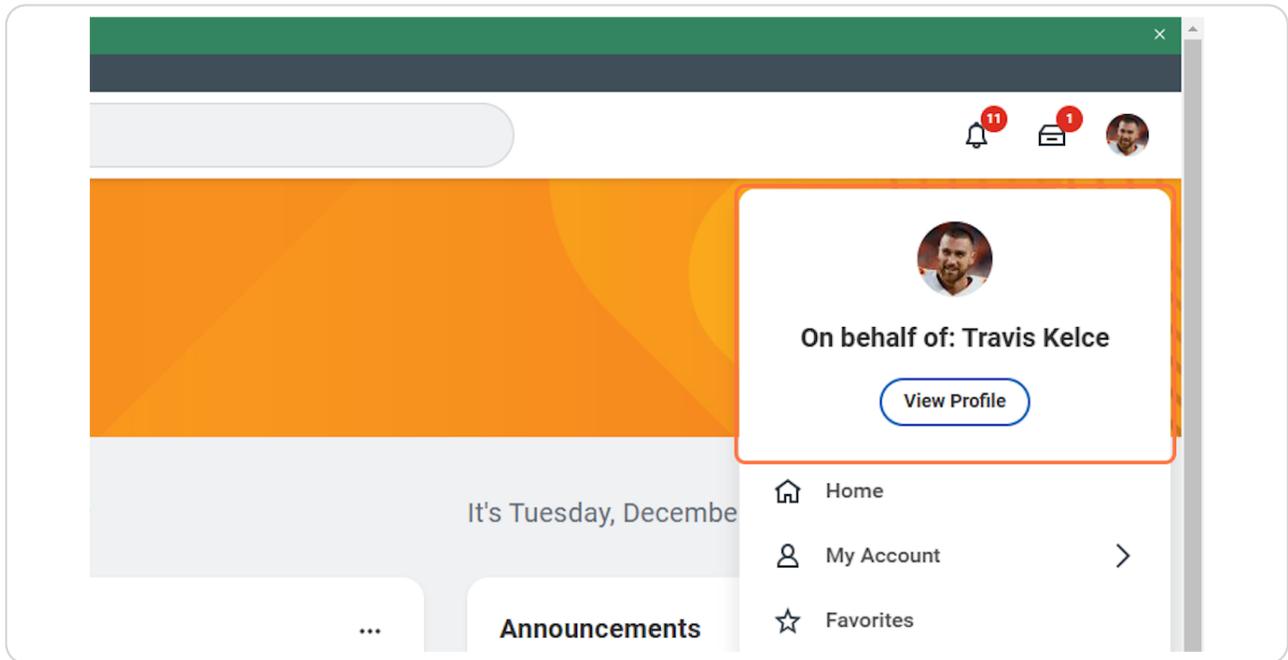
STEP 1

Click on your profile picture/icon in the top right corner



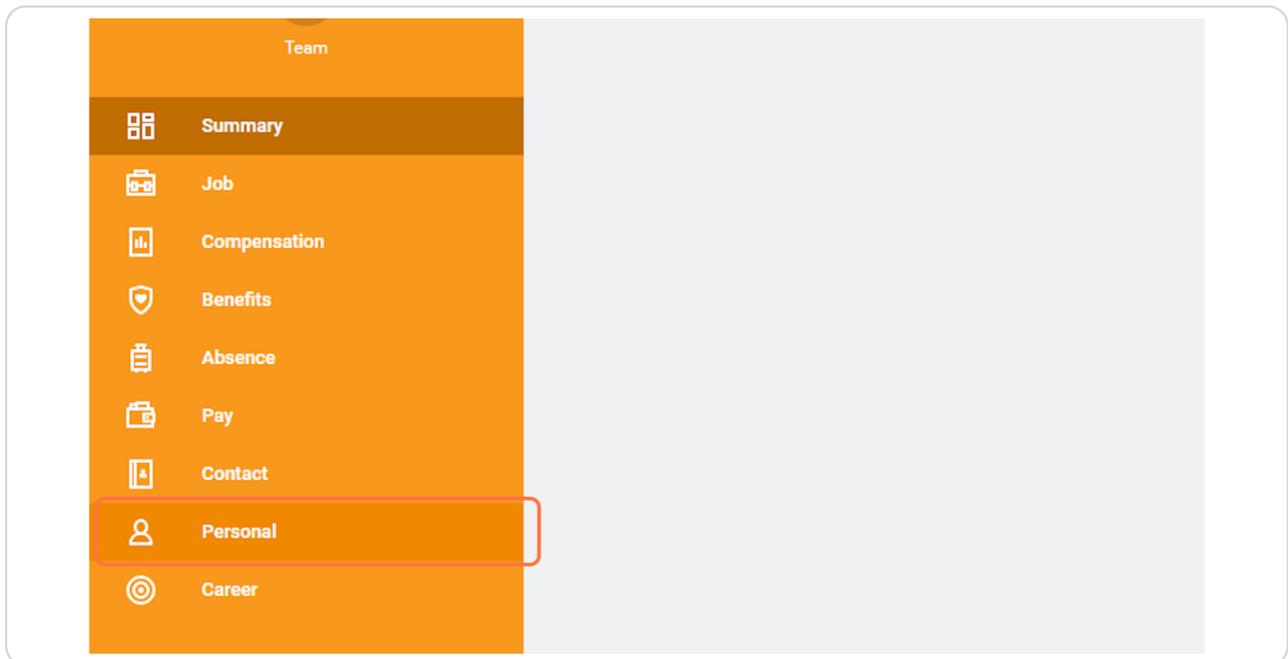
STEP 2

Click 'View Profile'



STEP 3

Click on the Personal tab



STEP 4

Click on the Names tab to review your current legal and preferred name

Personal Information **Names** IDs Documents

Legal Name 1 item

Name	
Travis Kelce	<button>Edit</button>

Preferred Name 1 item

Name	
Travis Kelce	<button>Edit</button>

Name Change History 2 items

Name Type	Change From	Change To	Effective Date	When Initiated	Status
Legal	Travis Kelce	Travis Kelce	10/22/2024	10/22/2024 04:23:11 PM	Successfully Completed
Preferred	Travis Kelce	Travis Kelce	10/22/2024	10/22/2024 04:23:11 PM	Successfully Completed

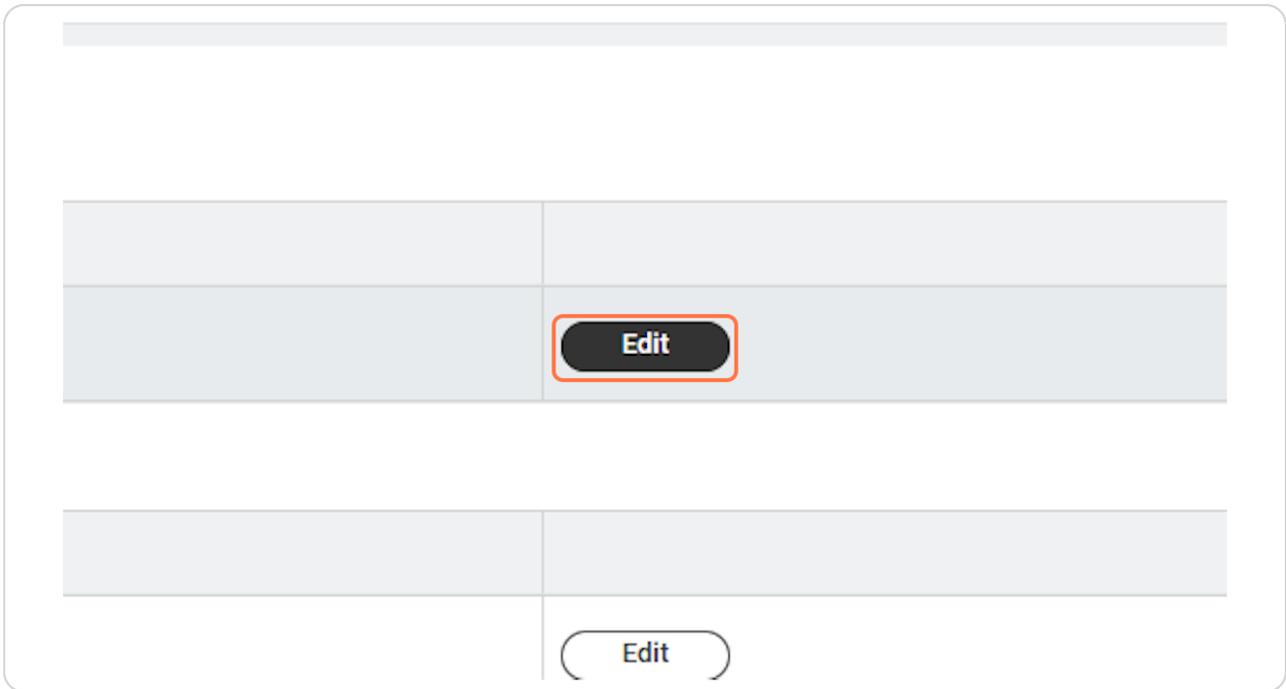
Updating Legal Name

9 Steps

STEP 5

Click on Edit next to the name you need to Legal Name update.

To update legal name we need a marriage license or updated government issued id or social security card.



The image shows a screenshot of a user profile page. At the top, there is a horizontal bar. Below it, there are two rows of information, each consisting of two columns. The first row has a dark grey 'Edit' button in the second column, which is highlighted with a red border. The second row has a light grey 'Edit' button in the second column.

STEP 6

Enter the effective date for the change.

- Benefit Changes – Marriage/Divorce is a qualifying event for a benefit c
- Tax Withholdings – Complete a new W-4 form. Please contact your pers
- Update Beneficiaries – Complete a new Beneficiary Designation Form.

Effective Date * 12/03/2024 

Country * 

Prefix 

STEP 7

Update first name if applicable.

Effective Date * 12/03/2024 

Country * 

Prefix 

First Name *

Middle Name

Last Name *

Suffix 

STEP 8

Update Last Name as applicable

Country	*	<input type="text" value="X United States of America"/>	:≡
Prefix		<input type="text"/>	:≡
First Name	*	<input type="text" value="Travis"/>	
Middle Name		<input type="text"/>	
Last Name	*	<input type="text" value="Swift-Kelce"/>	
Suffix		<input type="text"/>	:≡

enter your comment



Attachments

STEP 9

Click on **Select files to upload supporting documentation**

To update legal name we need a marriage license or updated government issued id or social security card.

ments

Drop files here

or

Select files

Submit **Save for Later** **Cancel**

STEP 10

Select other Documents as the document category.

The screenshot shows a document upload form. At the top, there is a profile picture and a comment box containing the text "Tswift and I finally". Below the comment box is the "Attachments" section, which includes a PDF icon and the text "ECF example-10_6_2024.pdf" with a green checkmark and "Successfully Uploaded!". The "Description" field is empty. The "Category" field is marked with a red asterisk and contains a search bar with the text "Search" and a red "X" icon. A dropdown menu is open, showing several radio button options: "Multi-Media (Audio) (Student)", "Multi-Media (Video) (Student)", "Named Professorships", "Notice Period", "Offers", "Other (Student)", "Other Documents", and "Passports and Visas". The "Other Documents" option is highlighted with a red box. Below the dropdown menu, a red error message reads: "Error: The field Category is required and must have a value." At the bottom of the form is an "Upload" button.

STEP 11

Enter a description of the documents you provided.

The screenshot shows the same document upload form as in Step 10. The "Description" field is now filled with the text "Marriage License" and is highlighted with a red box. The "Category" field is marked with a red asterisk and contains a dropdown menu with the text "Other Documents" and a red "X" icon. At the bottom of the form is an "Upload" button.

STEP 12

Feel free to leave a comment to help your HR partner process the change.
(optional)

Prefix

First Name *

Middle Name

Last Name *

Suffix

enter your comment


Attachments

 ECF example-10_6_2024.pdf
✓ Successfully Uploaded 

Description

Category *

STEP 13

Click on Submit

 ECF example-10_6_2024.pdf
✓ Successfully Uploaded!

Description

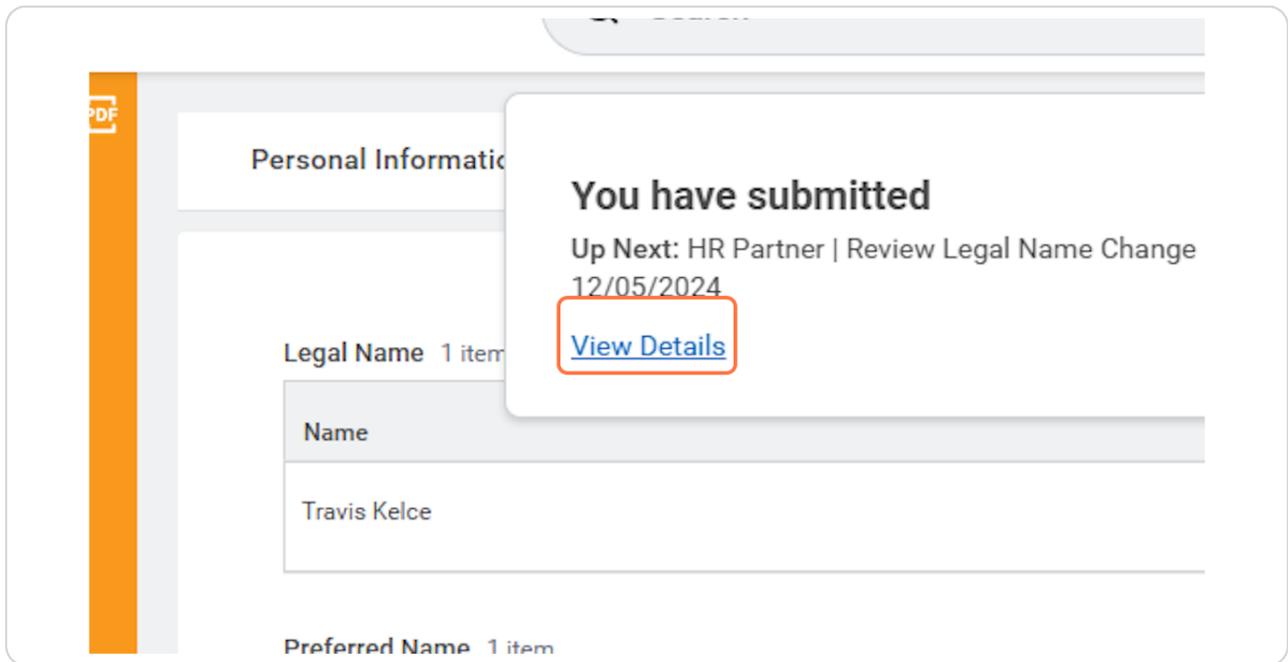
Category * 

View Pending Name Change Requests

4 Steps

STEP 14

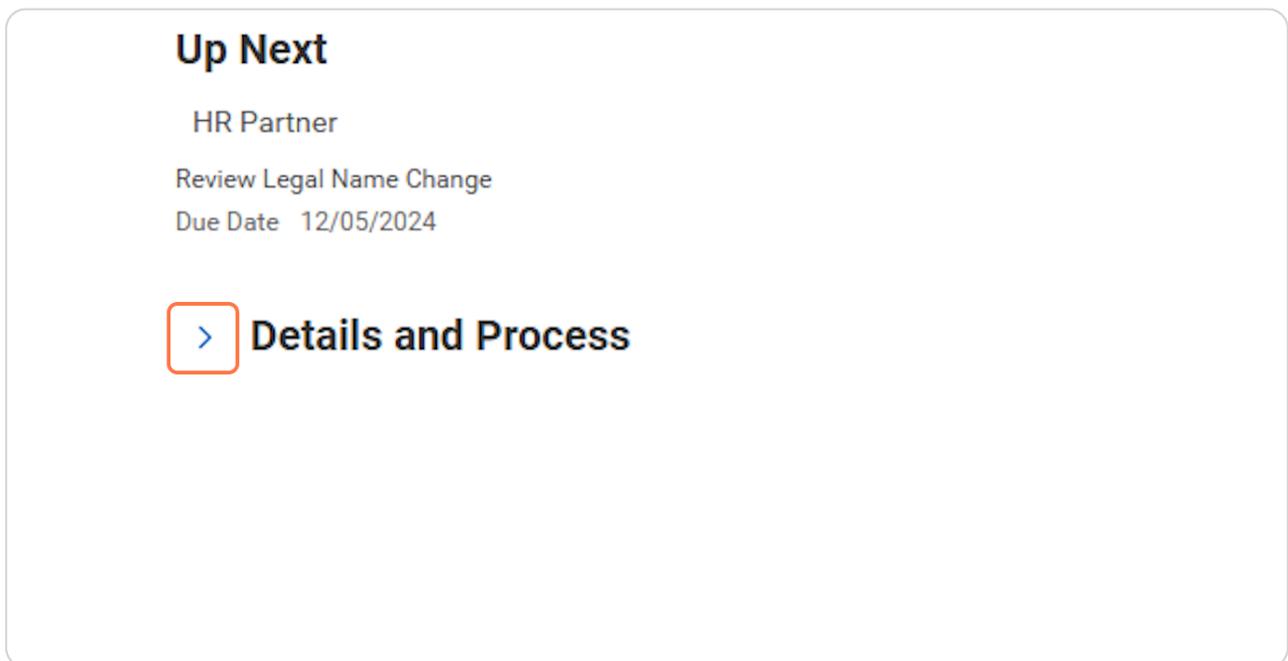
Click on View Details



The screenshot shows a web interface with a notification overlay. The notification reads: "You have submitted", "Up Next: HR Partner | Review Legal Name Change", "12/05/2024", and a blue "View Details" button with an orange border. In the background, a form titled "Personal Information" is visible, with a section for "Legal Name" containing one item: "Name" with the value "Travis Kelce". Below this, "Preferred Name" is also listed with one item.

STEP 15

Click on Details and Process



The screenshot shows a web interface with a section titled "Up Next". Below the title, it lists: "HR Partner", "Review Legal Name Change", and "Due Date 12/05/2024". At the bottom of this section is a blue button with a right-pointing chevron and the text "Details and Process", which is highlighted with an orange border.

STEP 16

The Details tab shows you a summary of the information you submitted.

Overall Process [Legal Name Change: Travis Kelce](#)

Overall Status [In Progress](#)

Due Date [12/07/2024](#)

[Details](#) [Process](#)

Person [Travis Kelce](#)

Change To

Effective Date [12/03/2024](#)

Country [United States of America](#)

Western Script

Prefix [\(empty\)](#)

First Name [Travis](#)

Middle Name [\(empty\)](#)

Last Name [Swift-Kelce](#)

Suffix [\(empty\)](#)

Name Change History [1 item](#)

Effective Date	Name	When Initiated
10/22/2024	Travis Kelce	10/22/2024 04:23:11 937 PM

Attachments

[Done](#) [sample-10_6_2024.pdf](#)

STEP 17

Click on Process tab to view next steps in request and who or which roles are assigned to those steps

Details and Process

For [Travis Kelce](#)

Overall Process [Legal Name Change: Travis Kelce](#)

Overall Status [In Progress](#)

Due Date [12/07/2024](#)

Details [Process](#)

Process History 6 items

Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons	Comment
Legal Name Change	Legal Name Change	Step Completed	12/03/2024 09:57:43 PM	12/07/2024	Travis Kelce	1	Alexus Brandenburg on behalf of Travis Kelce: Tswift and I finally tied the knot!
Legal Name Change	Review Legal Name Change	Awaiting Action		12/05/2024	Alexus Brandenburg (HR Partner)	7	
					Chelsea Bellmer (HR Partner)		
					Dawn Boomers (HR Partner)		
					Hannah Heisler (HR Partner)		
					Kolton Pavlicek (HR Partner)		

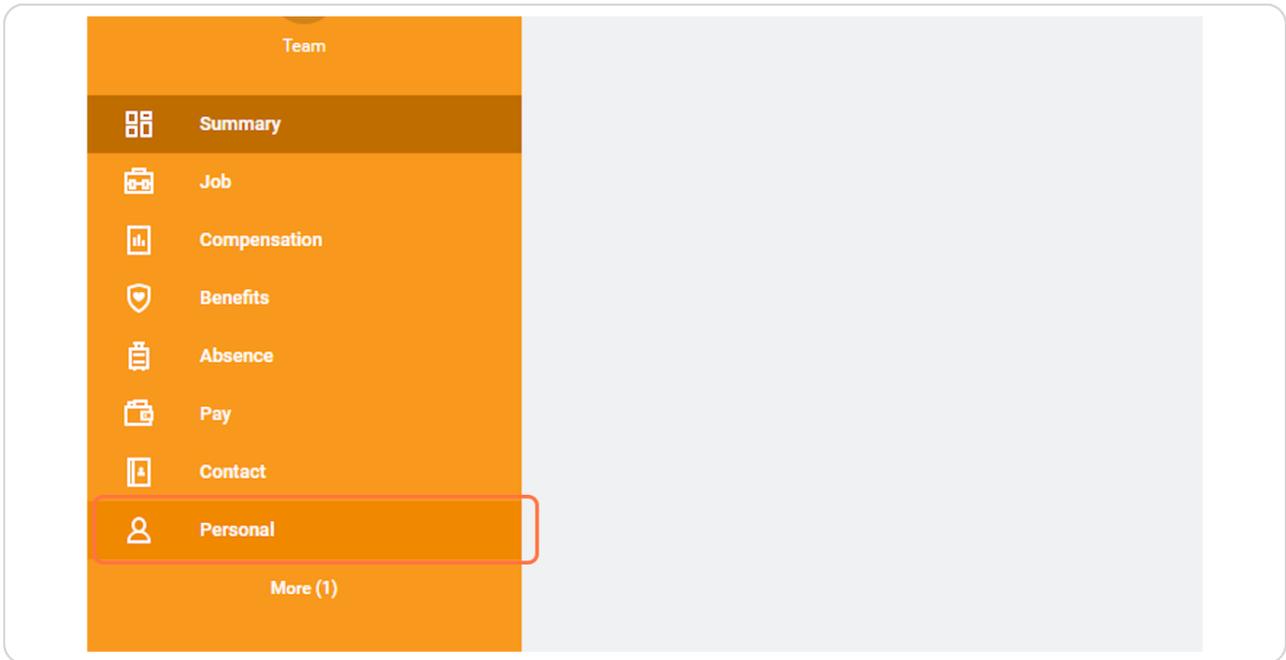
Done

Updating Preferred Name

7 Steps

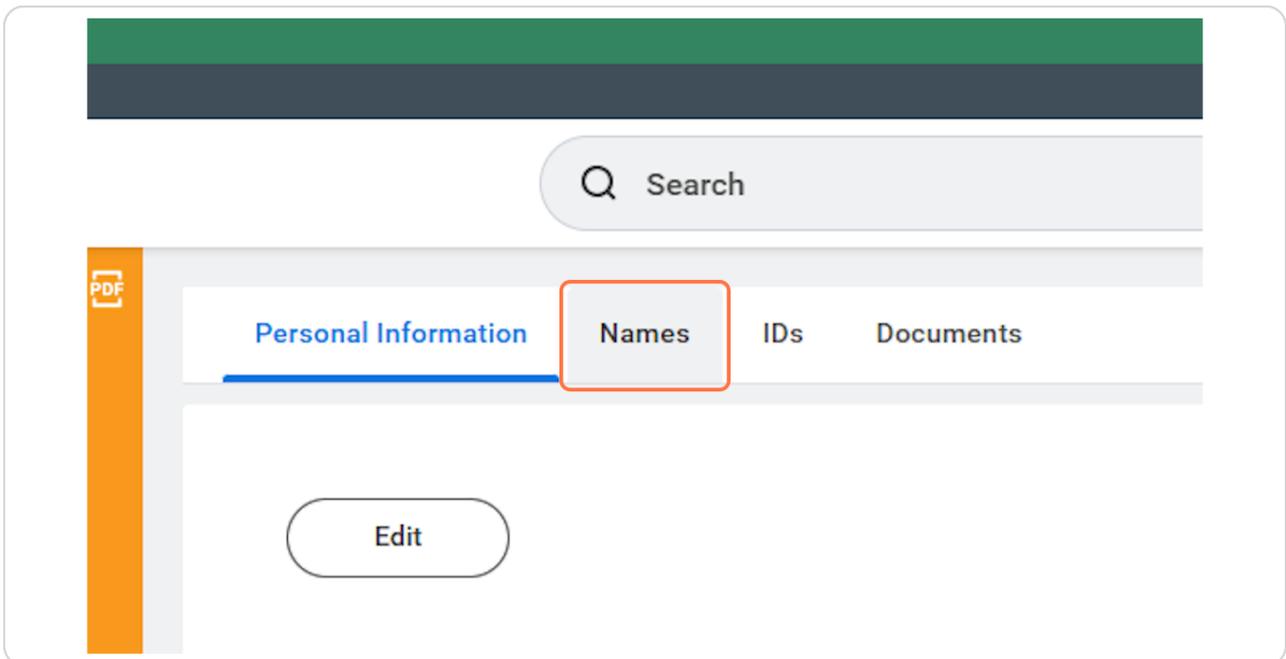
STEP 18

Click on Personal



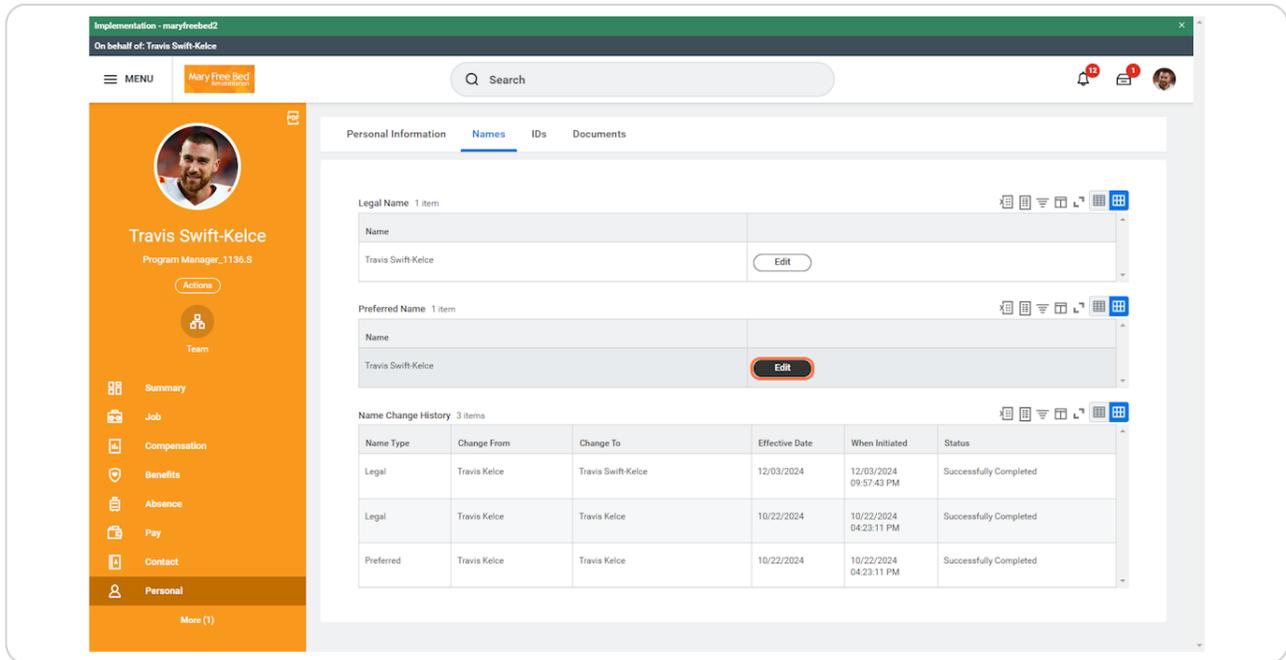
STEP 19

Click on Names



STEP 20

Click on Edit next to preferred name

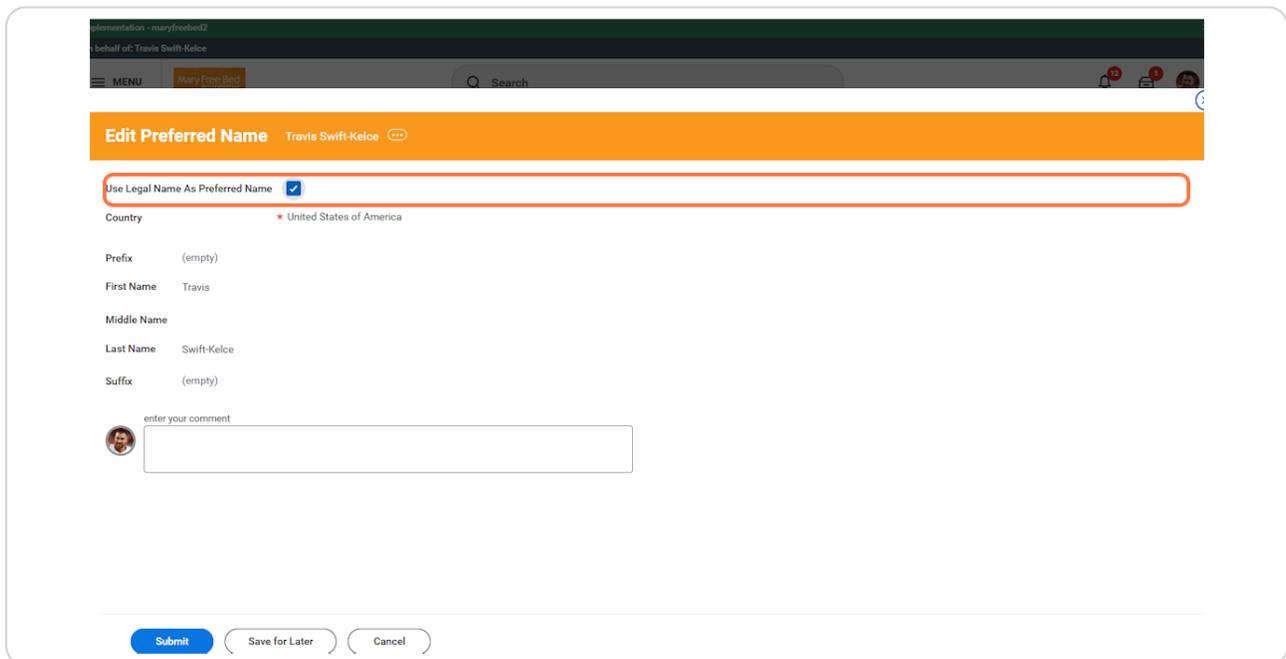


The screenshot shows a user profile page for Travis Swift-Kelce. The 'Names' tab is active, displaying three sections: 'Legal Name', 'Preferred Name', and 'Name Change History'. The 'Preferred Name' section shows 'Travis Swift-Kelce' with an 'Edit' button highlighted in red. The 'Name Change History' table shows three entries:

Name Type	Change From	Change To	Effective Date	When Initiated	Status
Legal	Travis Kelce	Travis Swift-Kelce	12/03/2024	12/03/2024 09:57:43 PM	Successfully Completed
Legal	Travis Kelce	Travis Kelce	10/22/2024	10/22/2024 04:23:11 PM	Successfully Completed
Preferred	Travis Kelce	Travis Kelce	10/22/2024	10/22/2024 04:23:11 PM	Successfully Completed

STEP 21

Un-check 'Use Legal Name..' if applicable



The screenshot shows the 'Edit Preferred Name' form for Travis Swift-Kelce. The 'Use Legal Name As Preferred Name' checkbox is checked and highlighted with a red box. The form includes fields for Country, Prefix, First Name, Middle Name, Last Name, and Suffix. A comment field is also present.

Use Legal Name As Preferred Name

Country * United States of America

Prefix (empty)

First Name Travis

Middle Name

Last Name Swift-Kelce

Suffix (empty)

enter your comment

Submit Save for Later Cancel

STEP 22

Update preferred First and/or Last Name as applicable

Use Legal Name As Preferred Name

Country * × United States of America ⋮

Prefix ⋮

First Name *

Middle Name

Last Name *

Suffix ⋮

STEP 23

Click on Submit

Note preferred name does not require HR approval and should take effect immediately.

enter your comment

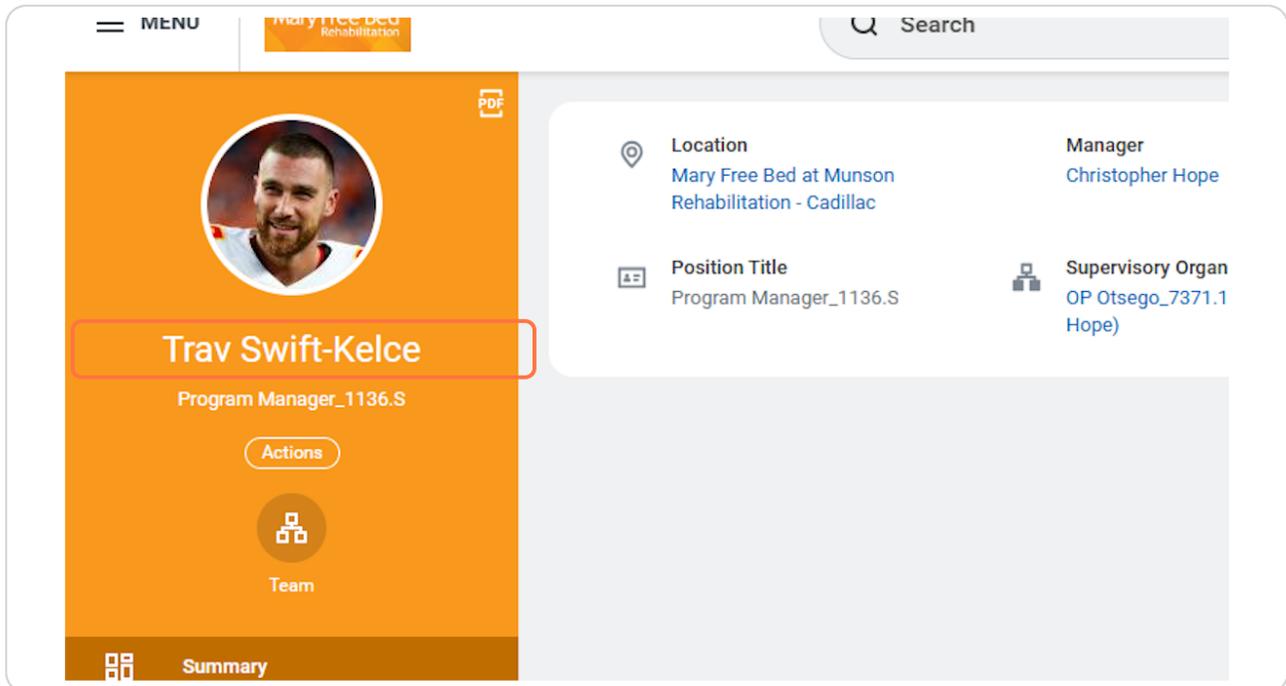
Submit

Save for Later

Cancel

STEP 24

Notice the worker profile has immediately updated with our changes.



The screenshot shows a user interface for a worker profile. On the left, there is a profile card for Trav Swift-Kelce, who is a Program Manager_1136.S. The card includes a circular profile picture, a PDF icon, an Actions button, a Team icon, and a Summary section. On the right, there is a summary of key information:

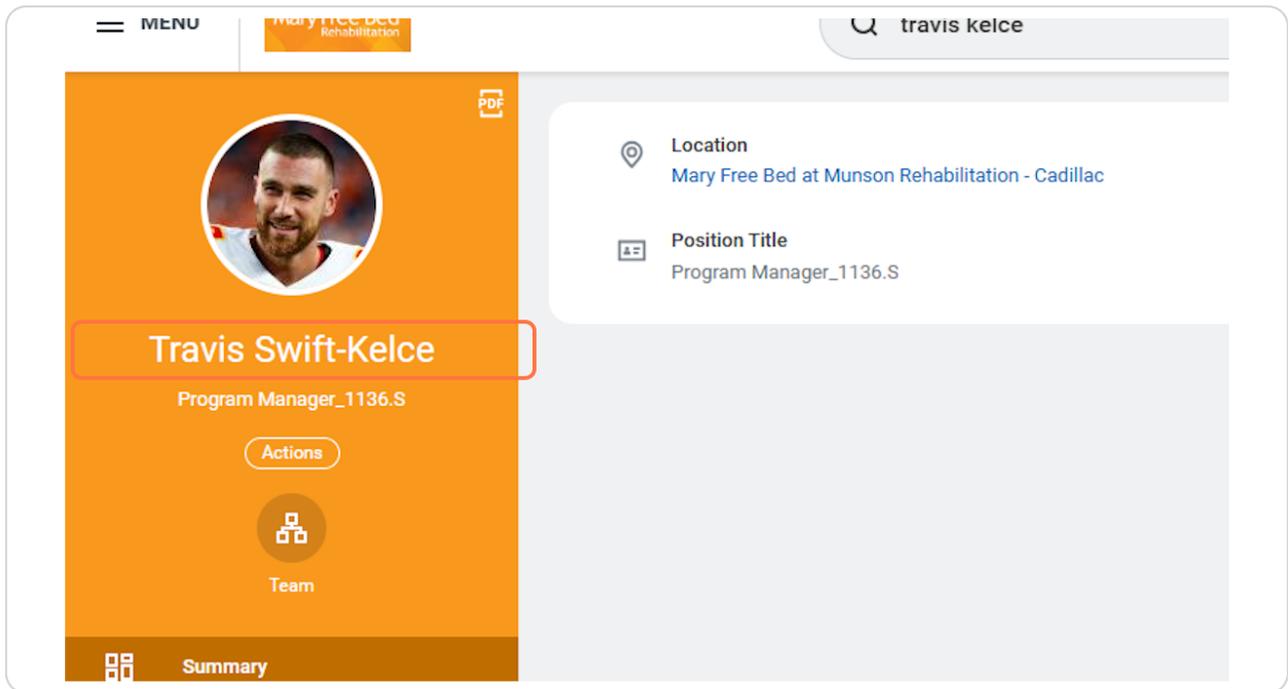
Field	Value
Location	Mary Free Bed at Munson Rehabilitation - Cadillac
Manager	Christopher Hope
Position Title	Program Manager_1136.S
Supervisory Organ	OP Otsego_7371.1 (Hope)

Reviewing Changes after Approval

7 Steps

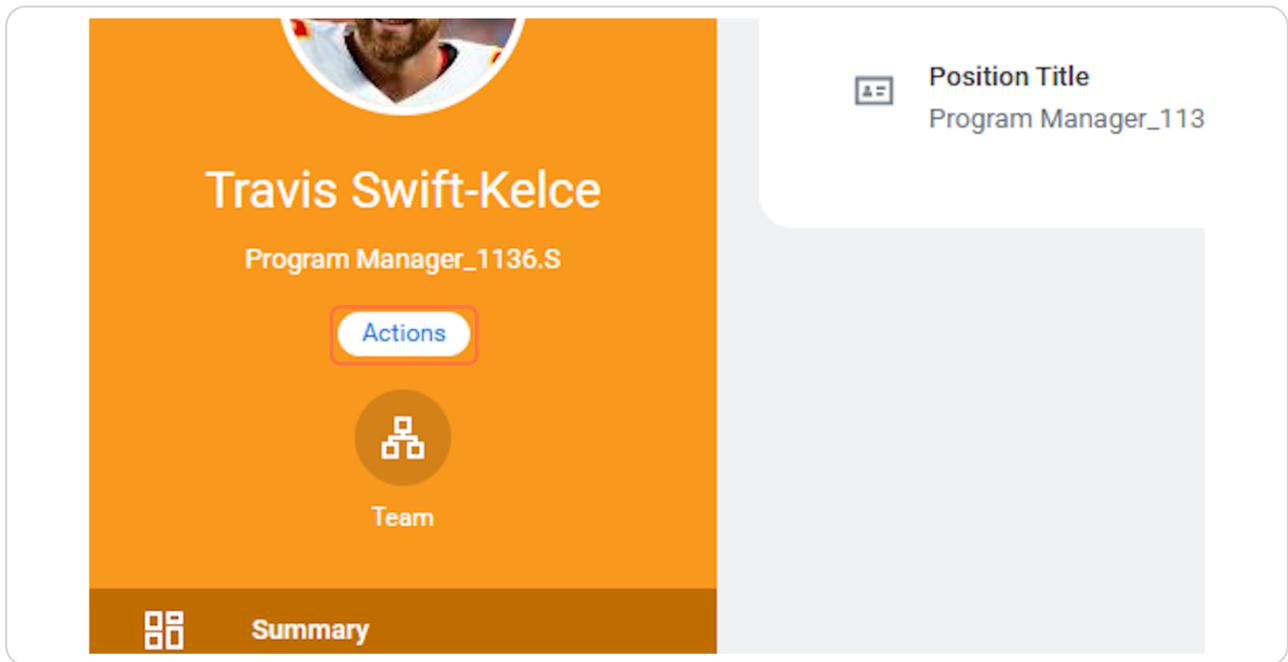
STEP 25

Navigate to your profile and you should see your Name Change updated once HR has approved and the effective date has come to pass.



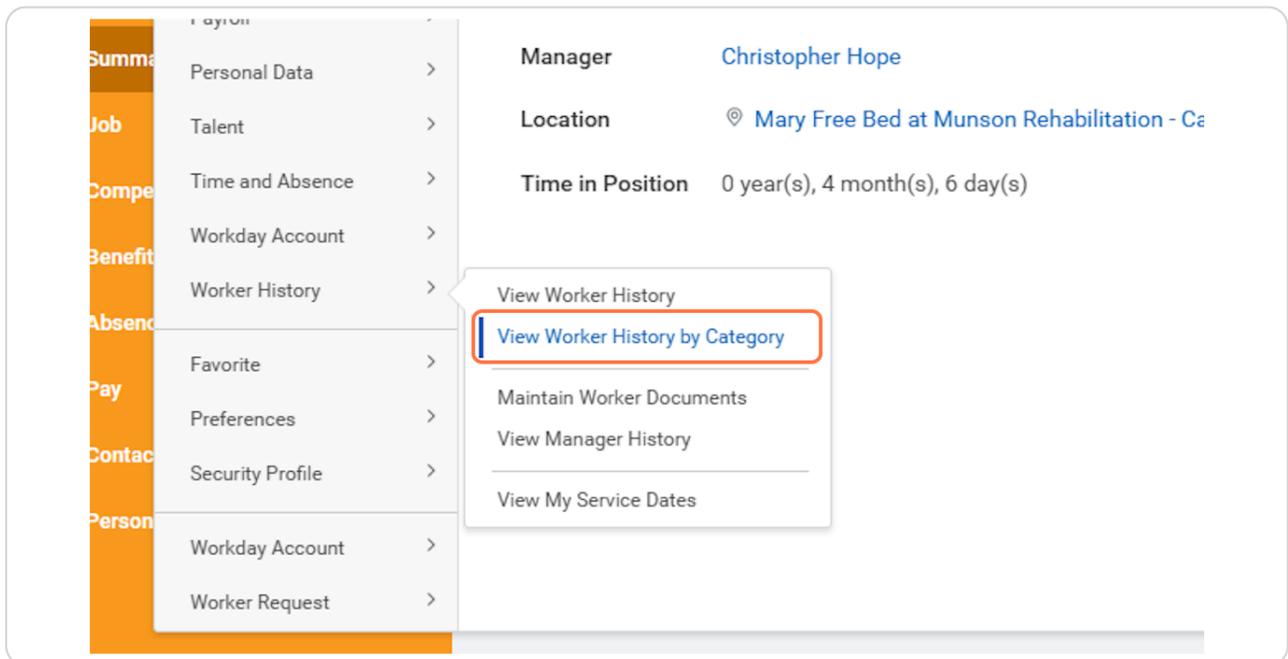
STEP 26

Click on Actions



STEP 27

Click on View Worker History by Category



STEP 28

Click on Personal Data

The screenshot shows the top navigation bar with a 'MENU' icon, the 'Mary Free Bed Rehabilitation' logo, and a search bar. Below this is a large orange banner with the text 'View Worker History by Category' and the worker's name 'Travis Swift-Kelce'. Underneath the banner are three tabs: 'Staffing', 'Personal Data' (which is highlighted with a red border), and 'Benefits'. Below the tabs, there is a section titled 'Hire History 1 item' containing a table with the following data:

Business Process	Initiated On	Start Date	Status
Hire: Travis Swift-Kelce	10/22/2024 04:21:07 PM	07/27/2024	Successfu

STEP 29

Here you can see a history of all personal data changes made.

The screenshot shows the 'Personal Data History' page for Travis Swift-Kelce. The page title is 'View Worker History by Category' and the worker's name is 'Travis Swift-Kelce'. The 'Personal Data' tab is selected. Below the tabs, there is a section titled 'Personal Data History 11 items' containing a table with the following data:

Business Process	Effective Date	Initiated On	Status	Change From	Change To
Legal Name Change: Travis Swift-Kelce	12/03/2024	12/03/2024 09:57:43 PM	Successfully Completed	Travis Kelce	Travis Swift-Kelce
Edit Licenses: Travis Swift-Kelce		10/23/2024 09:16:33 AM	Successfully Completed		
Photo Change: Travis Swift-Kelce		10/22/2024 04:41:50 PM	Successfully Completed		
Complete Form I-9: Travis Swift-Kelce - Employment Authorized	07/27/2024	10/22/2024 04:23:37 PM	Successfully Completed		
Change Emergency Contacts for Onboarding: Travis Swift-Kelce		10/22/2024 04:23:37 PM	Successfully Completed		
Edit Licenses: Travis Swift-Kelce		10/22/2024 04:23:37 PM	Successfully Completed		
Preferred Name Change: Travis Swift-Kelce		10/22/2024 04:23:11 PM	Successfully Completed	Travis Kelce	Travis Kelce
Legal Name Change: Travis Swift-Kelce	07/27/2024	10/22/2024 04:23:11 PM	Successfully Completed	Travis Kelce	Travis Kelce
Personal Information Change: Travis Swift-Kelce (United States of America)		10/22/2024 04:23:11 PM	Successfully Completed		
Home Contact Change: Travis Swift-Kelce	07/27/2024	10/22/2024 04:23:11 PM	Successfully Completed		

STEP 30

Click on Preferred Name Change: Trav Swift-Kelce

Staffing **Personal Data** Benefits

Personal Data History 13 items

Business Process	Effective Date	Initiated On	Status
Preferred Name Change: Trav Swift-Kelce		12/03/2024 10:03:41 PM	Successful
Preferred Name Change: Trav Swift-Kelce		12/03/2024 10:02:06 PM	Successful
Legal Name Change: Trav Swift-Kelce	12/03/2024	12/03/2024 09:57:43 PM	Successful
Edit Licenses: Trav Swift-Kelce		10/23/2024 09:16:33	Successful

STEP 31

Notice overall Status says successfully completed indicating there are not further steps required.

Implementation - maryfreebed2
On behalf of: Travis Swift-Kelce

MENU Mary Free Bed **Embroider** Search

View Event Preferred Name Change: Trav Swift-Kelce

For Trav Swift-Kelce

Overall Process Preferred Name Change: Trav Swift-Kelce

Overall Status Successfully Completed

Due Date 12/04/2024

Calendars In Use Consecutive Days (No Calendars Selected)

Details **Process**

Person Trav Swift-Kelce

Change To

Country United States of America

Western Script

Prefix (empty)

First Name Trav

Middle Name (empty)

Last Name Swift-Kelce

Suffix (empty)