

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 Staff

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 technician 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, record file is changed to reflect the name change.
 - 5.2.3 New social security card is scanned and attached to the employee master file.
- 5.3 If employee is certified staff:
 - 5.3.1 Application for Duplicate License or Amendment to File is completed, with a notarized or certified copy of a marriage license, a divorce degree or a court order generating the legal change of name attached.
 - 5.3.2 Completed application is forwarded to the Tennessee State Department of Education and a copy is scanned and attached to the employee master file.
- 5.4 Technician issues employee new ID Badge.
- 5.5 Technician corrects employee master file.
- 5.6 Technician sends an e-mail to the Systems Administrator in the Technology Department of the name change (old name and new name) of a permanent employee so that the necessary changes can be made for email purposes.
- 5.7 If the employee has Blue Cross/Blue Shield insurance with the district, employee is directed to the Benefits office. If the employee does not have insurance the procedure is complete.
- 5.8 The changes are recorded on the Blue Cross/Blue Shield Form.

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5.9 Benefits staff forwards completed form to Blue Cross/Blue Shield and a copy is filed with Benefits office.

5.10 Blue Cross/Blue Shield issues new Identification Cards to the employee.

6.0 ASSOCIATED DOCUMENTS:

6.1 Blue Cross/Blue Shield Form

6.2 TN Dept. of Ed. Application for Duplicate License or Amendment to File (ED-2997)

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Blue Cross/Blue Shield Form	Insurance file	Indefinitely	Permanent	Secured Building
Application for Duplicate License (copy)	Employee Master File	Indefinitely	Permanent	Secured Building

8.0 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.

9.0 FLOWCHART:

9.1 A flowchart detailing this process can be found in "Exhibit A" of this procedure.

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Name Change Flowchart

