



Approving ESS Name Changes Overview

Some, but not all, Agencies allow employees to make updates in Employee Self Service (ESS) including name changes. This Job Aid provides instructions on how to approve name changes in Cardinal requested by employees through ESS.

When an employee submits a name change through ESS, an approval request will route to all HR Administrators in the Agency. The employee will receive a notice that the request is pending approval, and the employee acknowledges they need to provide supporting documentation to their employing Agency. The request will remain pending until an Agency HR administrator either approves or denies the pending request. The HR administrator must review the employee's supporting documentation to verify the legal name and take the appropriate action.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.



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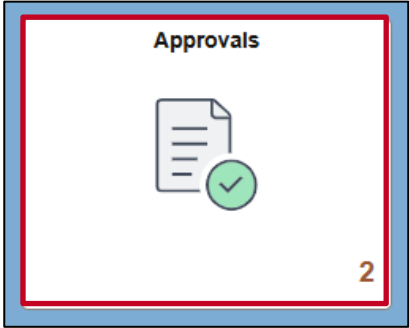
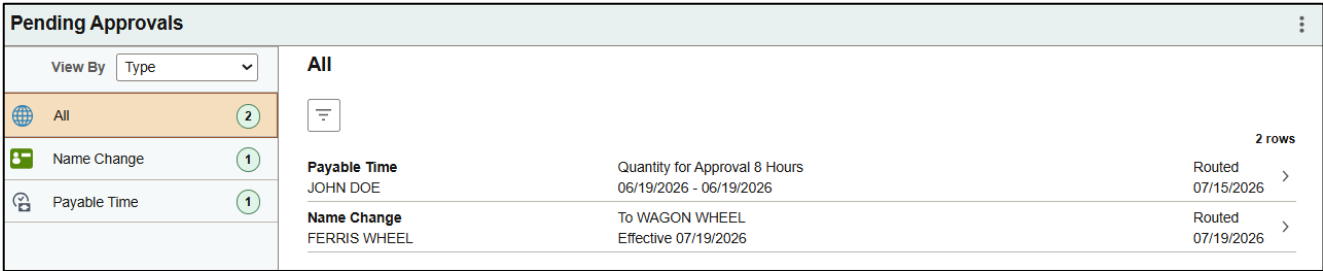
Human Resources Job Aid

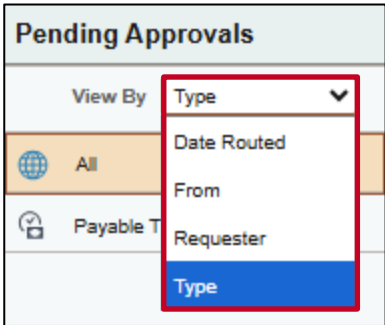
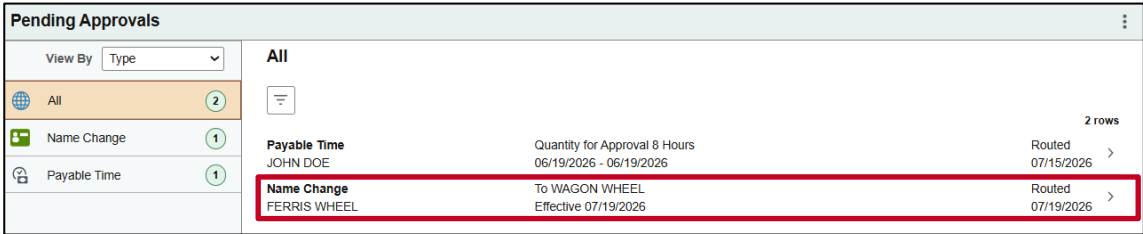
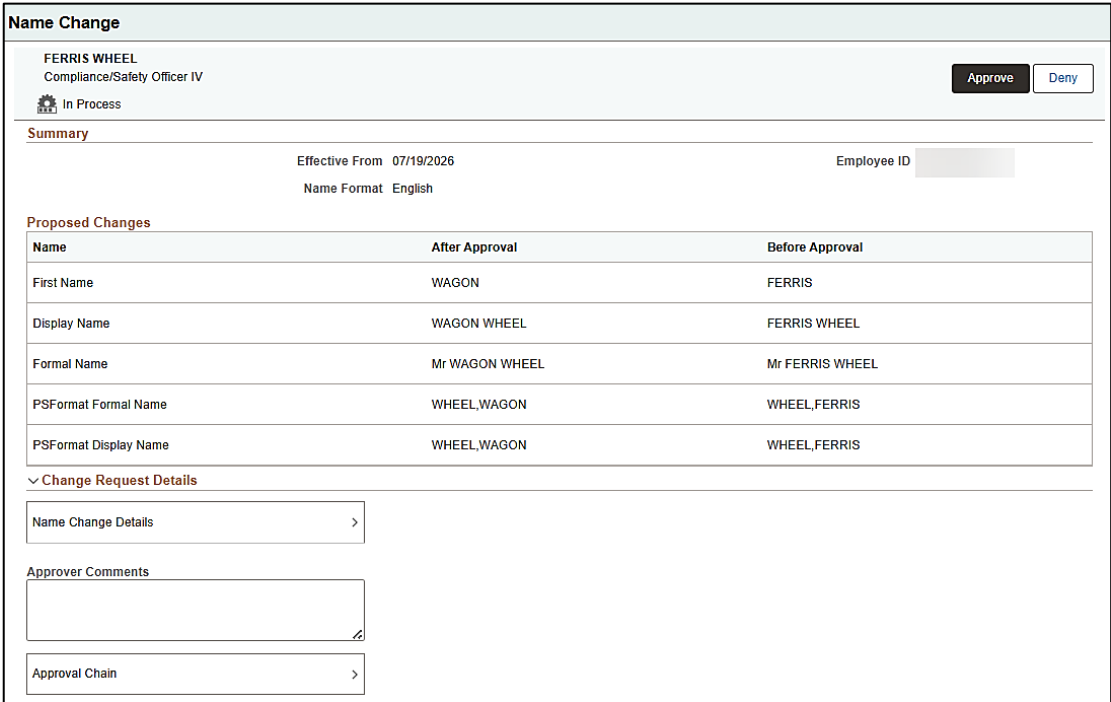
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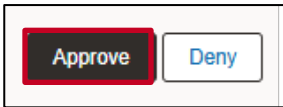
Revision History

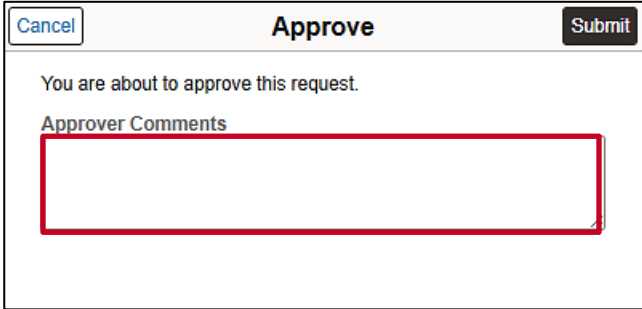
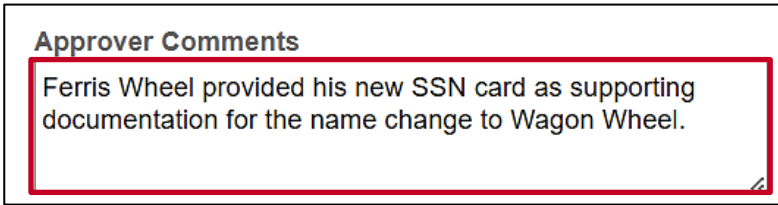
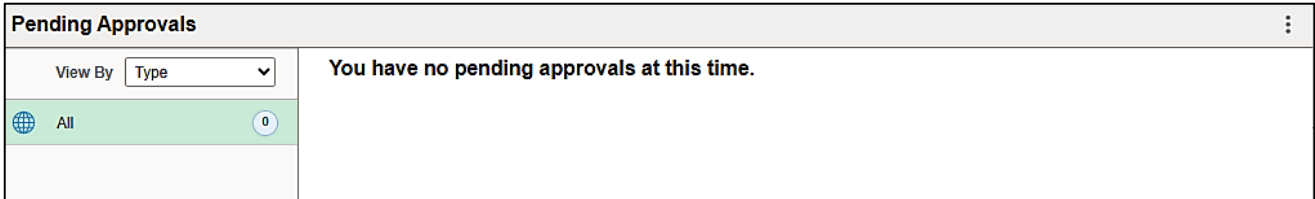
Revision Date	Summary of Changes
9/1/2026	Updated to reflect Cardinal system upgrades.
7/24/2026	Baseline.

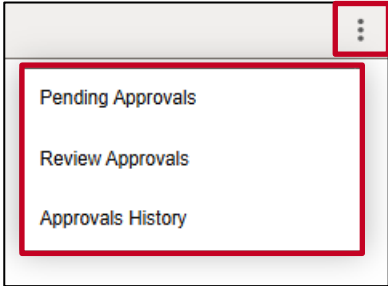
Approving Name Changes

Step	Action
1.	Navigate to the Pending Approvals page by clicking the Approvals tile on the Cardinal HCM Homepage. 
	The Approvals tile indicates the number of items awaiting approval. 
The Pending Approvals page displays. 	

Step	Action
	The left navigation menu displays a View By field with a dropdown button to sort pending approvals by “Date Routed”, “From”, “Requester”, and “Type” (the default value). Note: The View By menu list items may vary. 
3.	Click the applicable line item (row) to review the Name Change pending approval. 
The Name Change page displays for the selected line item. 	

Step	Action
	The Summary section at the top of the page includes: • Effective From – the date the name change goes into effect • Employee ID – the employee ID of the employee requesting the name change The Proposed Changes section includes: • Name – columns of First Name, Display Name, Formal Name, and Name • After Approval – displays the employee's First Name, Display Name, Formal Name, and Name as it will appear in the system after approval • Before Approval – displays the employee's First Name, Display Name, Formal Name, and Name as it appears currently in the system The Change Request Details section includes: • Name Change Details – opens a pop-up window displaying the details of the name change • Approver Comments – displays comments entered by the approver • Approval Chain – opens a pop-up window detailing the Name Change Approval Chain
	If the requested effective date is earlier than the employee's current name record in Personal Data, the system will not update the record automatically upon approval. In this scenario, HR Administrators should deny the request and take one of the following actions: • Instruct the employee to submit a new request with a current effective date, OR • Manually update the record by adding a new effective-dated row in Personal Data and keying the change to the applicable name field(s). If the transaction is approved with an effective date that is earlier than the current effective date in Personal Data, no updates will be applied to the system, and no warning or error messages will be displayed.
4.	After reviewing the appropriate supporting documentation for the name change request, click the Approve button. 
The Approve page displays in a pop-up window. 	

Step	Action
5.	Enter applicable comments in the Approver Comments field. Note: Do not use special characters. 
	An entry should be made in the Approver Comments field to submit the approval. Refer to Agency policy regarding applicable comments. 
6.	Click the Submit button. 
The Pending Approvals page redisplay with any remaining pending approvals if applicable. 	

Step	Action
	The More Actions button (3 dots) in the top right hand corner of the page allows users to select “Pending Approvals”, “Review Approvals”, and “Approvals History” to take any needed additional actions. 
	After approval, the employee’s name will update in their Personal Data with the effective date selected by the employee and confirmed with the supporting documentation.
7.	Navigate to the Modify Person page to validate the name change displays as expected. For more information on accessing the Modify Person page, see the Job Aid titled HR351 Viewing and Modifying Personal Data located on the Cardinal website in Job Aids under Learning.