

September 13, 2022

## **NAME CHANGE CHECKLIST**

1. **Official Documents:** employee to provide a softcopy of the following:
  - a. Marriage Certificate;
  - b. Record of Solemnization of Marriage; or
  - c. Divorce Decree.
2. **Ceridian:** OI to amend Employee Profile potentially including banking information. CRA must be informed via Change in Marital Status Form.
3. **Canada Life:** employee to complete Sections 6 and 13 of the M6109-1/20 Group Coverage Change Form and forward it to the Administrative Manager in PDF softcopy. The form resides on the “Benefits” page of the Lunch Room. The Administrative Manager can action this change via the GroupNet for Plan Administrators online access. Initially no change to employee login or password. A new digital benefit card will be created and Groupnet for Plan Members login updated.
4. **Execulink:**
  - a. OI to create new oiweb e-mail addy using OI convention ie. combine first letter of first name with full last name all lower case but maintain the same password as the;
  - b. original e-mail addy will be maintained for the near-term and “forwarded” to the new e-mail inbox to ensure nothing is lost in the transition. Similarly, the original e-mail password remains unchanged;
  - c. must change the e-mail signature blocks on the OI iPhone and MacBook; &
  - d. must add the new e-mail account to OI iPhone for the new e-mail addy and verify it at minimum via iPhone, laptop, and Execulink Webmail.
5. **When I Work (WIW):** OI to amend only the “LAST NAME” field in the original Employee Profile...this will amend the name displayed in WIW. To maintain database integrity, the original Employee Profile EMAIL (login) and PASSWORD fields remain unchanged until calendar year end. A new Employee Profile will be created at that time so as not to interfere with annual time-off entitlements.
6. **Telus (C&I Technologies):** OI to amend user associated with the iPhone and Simm card number via Telus account.
7. **OI Lunch Room:**
  - a. OI to amend the LOGIN User Name but no change to Password;
  - b. OI to amend the “client.tab” file and rename the login html file residing on the server;
  - c. OI to amend the appropriate row of the “Init” column of the *Employment Position Summary* table on the “Policies” page and *OI iPhone Numbers* table on the Health & Safety” page to capture the new initials. A formal announcement will be posted on the “News” page; &
  - d. OI to Manage Evaluators of the **OI Online Office Assessment** tool and select the applicable profile to “Edit” the Last Name and Username fields. No change to the Password.
8. **Website:**
  - a. OI to re-program the linked html file name and amend the name displayed on the “Our Team” page; &
  - b. OI to rename the html file and displayed name on the “Biography” page.

9. **iClouds:**

- a. OI to amend the [optionsinc@oiweb.com](mailto:optionsinc@oiweb.com) Consulting Team iCloud Contacts; &
- b. OI to amend the [management@oiweb.com](mailto:management@oiweb.com) Management Group iCloud Contacts.

10. **Business Cards:** OI to amend and re-print business cards.

11. **F1 Record:** OI to amend Employee Data Form.

12. **QuickBooks:** OI to update employee profile.

13. **E&O Insurance:** OI to update required certificate.

14. **US Business Visitor Package:** OI to update and requires a copy of the Marriage Certificate or Divorce Decree.

15. **Passport:** employee to update and requires a copy of the Marriage Certificate or Divorce Decree.

16. **Security Clearance:** employee/OI to update and must be re-submitted with copy of the Marriage Certificate or Divorce Decree.

17. **AMEX:** employee to request a Name Change Authorization Form from Amex via phone. Received via mail, it must be completed and returned with a copy of the Marriage Certificate or Divorce Decree.

18. **Client:** employee/OI will assess and action any specific client safety and/or security documents that may require a copy of the Marriage Certificate or Divorce Decree.

19. **Epost:** employee to amend account including login - preferably leave personal e-mail addy unchanged.