



Question of the Week

July 9, 2025

Question

An employee let us know they changed their name. What documentation do we need, and what changes do we need to make?

ANSWER

When an employee informs you that they've changed their name, it's important to handle the update properly—both to show respect for the employee and to stay compliant with your recordkeeping obligations. Below are steps you'll want to take to get their information updated in all the key places. Keep in mind that some name change documentation may take a while for the employee to receive, but you can still recognize their new name in your communications systems without official documentation.

- Obtain a copy of the employee's updated Social Security card. Use this to update their name in your HRIS and payroll system, and ensure the names match exactly.
- Ask the employee to complete a new W-4. The IRS requires that the name on the Social Security card matches the name on W-4 and W-2 forms.
- Update their Form I-9. While not required, the U.S. Citizenship and Immigration Services recommends keeping the Form I-9 up to date. You can easily update it by entering the employee's new legal name into the second box of Supplement B, then signing and printing your name and writing the date in the indicated fields.
- Update the employee's benefits paperwork. If the change is related to marriage or other qualifying events, the employee may want to update elections or dependent information. This is also a good time to review and update their beneficiary forms, if applicable.

- If driving is one of their job duties, request an updated version of their driver's license for your records.
- Update company phone lists, email accounts, business cards, badges, uniforms, name plates, etc. The employee's preferred name can be used with these updates, if it's not the same as their legal name.
- Work with the employee to determine how best to communicate the name change.

You can find a sample [change of information form](#) on the platform. Employees can use this to alert you to a name change or other update to their personal information.

This Q&A does not constitute legal advice and does not address state or local law.