

Appendix 2

Checklist: Supporting a Trans Staff Member

If a staff member is considering or undergoing the process of transition they should contact either their line manager, Head of School or Head of Department, or Human Resources Equality Officer for support. The person considering or undergoing transition may find it helpful to complete the **Notification Form at Appendix 1**.

A meeting will be arranged to discuss the situation in confidence and to agree the support and process.

A very important element of this meeting will be to determine who should be told what and when and how this should occur. These decisions should be led by the trans staff member.

This is a checklist for that meeting to help ensure appropriate practical support is in place for trans staff prior to, during or following their transition. This list is not exhaustive and should be read in conjunction with the Trans Equality Policy and Accompanying Procedure.

Email and user names

- Which email accounts and user names will need to be changed and when?
- If the staff member has a fluid gender identity, will separate email accounts need to be created or is it possible to link the two?

Identification

- Which identification cards/name badges will need to be changed and when?
- If the staff member has a fluid gender identity, will they need more than one of these types of identification?

Examples of identification that will need to be updated:

- University ID card
- Library card
- Volunteer/mentor ID badges
- Trades union membership badge
- Professional/learned body membership cards
- Canolfan Brailsford gym membership card
- Catering/food meal card (Yoyo)
- Placement ID cards
- Course representative card

Records and documents

No records should be changed without the permission of the staff member concerned. An agreed date should be made in which all records are changed.

Trans people can change their legal name by making a statutory declaration of name change however some trans people choose not to change their name. It is never a requirement for a staff member to present a Gender Recognition Certificate to change their name.

Some records can be changed at the request of the individual (e-mail and directory etc.) with no official documentation needed. A written notification of intent to transition is sufficient. Other records (HR, Occupational Health, pensions and degree certificates) can only be

changed once official documentation has been received. Under the GDPR, trans identity and gender reassignment constitute 'sensitive personal data'.

A person's file or record should always reflect their current name and gender. Any documents that need to be kept related to the person's trans status should be kept confidentially in a sealed envelope and be only viewed by people when required, and with the permission of the individual concerned. If a trans person receives a Gender Recognition Certificate (GRC), they have the right to request that all references to their former name and gender are removed from old records. In this case all past records must be updated and replaced in their file. For example, their old birth certificate should be replaced with their new one; any letters for offers/acceptances should be replaced reflecting their new name. Nothing should remain in the file that would reveal to a third party that a change has occurred.

As with all name changes for staff certain documents can be presented either by email or in person. Official documentation stating their new/updated name/ID must be one of the following:

- Passport
 - DEED POLL confirmation
 - Marriage certificate
 - Driving licence
 - Other Governmental identity cards
- (A copy of the official documentation will be scanned and kept with confidential records on the HR system.)

Examples of records that will need to be updated and which documents and records need to be replaced or altered and when include the following:

If the staff member or student has a fluid gender identity, will they need more than one of these types of identification?

- Academic biographies on MyBangor
- Photographs
- All staff records and databases, enrolment forms, finance records
- Course, programme and module lists
- Personal tutor records
- Welfare/disability/counselling records
- Volunteering and mentoring records
- Course representative posters and contact details
- Committee minutes and records, for example, boards of study or academic boards

Note: We may not be able to amend historical minutes. Consideration should be given to officially noting someone's transition during minuted proceedings if appropriate. Alternatively, consider thanking the existing committee member for their services and welcoming them as a new committee member under their new name.

- Certificates, for example, council tax exemption, training attendance, degree
- Club and society membership records
- Payroll (and banking details)
- Pension, death in service and dependents' benefits

Note: For the purposes of state pensions, trans people without a (GRC) are treated as the sex recorded at birth. USS and UPAS will require legal evidence of gender as well as name change. For this staff should be asked to provide a new birth certificate and if appropriate a statutory declaration of name change.

- Insurance policies
- Funders

Informing others

Who needs to be informed? How and when should they be informed?

Examples of who may need to be informed

- Colleagues and students
- Support departments (finance, student records, accommodation, etc.)
- Committee secretaries

Practical Considerations

Some practical considerations will arise when a person is transitioning, for example, single gender facilities and dress codes. When a person transitions, they usually start to use the facilities that are appropriate for their gender identity, e.g. trans women use the female facilities, trans men use male facilities. Non-binary people will use the facility that seems most appropriate to them. It may be necessary to explain the situation carefully to work colleagues after consultation with the trans person. Suggesting that the trans person use the disabled toilet is not acceptable unless the person is disabled and requires the use of those toilet facilities.

Flexibility is required in dress codes while someone is early in transition, as they will often have to buy new clothes, and this should be discussed with the individual, taking into account what they are required to wear to work and in line with any health and safety dress codes that the University has which are applicable to all staff and students.

Processes to support medical transition

Staff undergoing medical and surgical processes related to gender reassignment should be treated in exactly the same way as all other sickness-related absence, in line with the University's Absence Policy.

Other policies such as the Flexible Working Policy may also be relevant. As with all cases, managers should try to be as flexible as possible to meet reasonable requests for leave or changes to working patterns and study being mindful to operational needs and examinations.

- If the staff member is, or will be, undergoing surgery, do they know when this will be?
- If the staff member requires time off for surgery and recovery, what processes/support/adjustments are needed to ensure they remain in employment or can return when they have recovered?
- Are there any professional or attendance requirements that may be affected by the person's absence for medical assistance?

Training

- Will there be a need to arrange any training for managers, colleagues or fellow students?
- Who should be trained?

Reporting Transphobia

All incidences of bullying, harassment and discrimination can be reported through the Human Resources Equality Officer. Incidents can be reported anonymously or with the option to receive support from a trained harassment advisor.