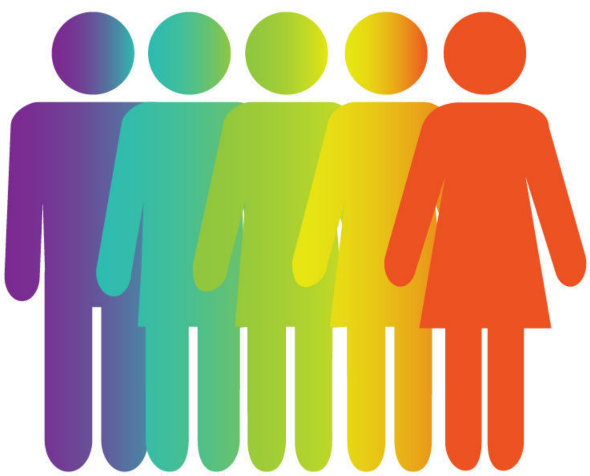
PARTNERS HEALTHCARE | FOUNDED BY BRIGHAM AND WOMEN'S HOSPITAL AND MASSACHUSETTS GENERAL HOSPITAL

Diversity & Inclusion

Toolkit for Transitioning Colleagues

What you need to know regarding Gender Identity/Expression



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Toolkit for Transitioning Colleagues

This Toolkit addresses the needs and issues that arise in the workplace when a transgender member of the Partners HealthCare workforce ("Colleague") transitions and it can act as a guide for the transitioning Colleague. As transgender individuals may choose to express their gender identity in the workplace, companies necessarily become involved in the transgender individual's transition. It is our expectation that workplace concerns that arise when a transgender person transitions will be addressed appropriately and promptly to maintain a productive workplace environment where all members are treated with dignity and respect.

Partners recognizes that everyone's transition experience is different, and while many aspects of this Toolkit are deemed important to both the transitioning Colleague and the employer, it is always subject to dialogue and individual circumstances. Partners is committed to working with the transitioning Colleague to come up with a plan, guided by this Toolkit, that takes into account such individual circumstances.

Definitions

Gender identity
An individual's internal sense of being male, female, both, or neither. Since gender identity is internal, one's gender identity is not necessarily visible to others.

Gender expression
How a person represents or expresses one's gender identity to others, often through behavior, clothing, hairstyles, voice or body characteristics. A person's gender identity cannot necessarily be identified from their gender expression.

Gender binary
The grouping of gender identity into two distinct, opposite and disconnected forms of male and female.

Transgender
An individual whose gender identity is different from the assigned gender at birth. Transgender is an adjective, not a noun.

Transgender woman
An individual who was assigned male at birth but who identifies as a woman in terms of her gender identity.

Transgender man
An individual who was assigned female at birth but who identifies as a man in terms of his gender identity.

Genderqueer, gender non-conforming, non-binary
An individual who identifies as neither male nor female, or identifies as both male and female.

Gender transition
The process by which an individual strives to more closely align their gender identity with their gender expression. Transitions may be social, whereby an individual might begin dressing differently, using a different name or pronouns, or change the gender listed on their identification documents. Transitions may be medical, in which an individual may modify their bodies through hormone replacement therapy (HRT) or surgery. Both social and medical transitions are covered by this policy.

Transphobia
A range of antagonistic attitudes and feelings against transgender people. Transphobia can be emotional disgust, fear, anger, or discomfort felt or expressed either covertly or overtly towards people who do not conform to society's gender expectation.

Overview

Transgender Colleagues have the right to express their gender identity openly at work, if they so choose, without fear of consequences. If the transitioning Colleague chooses, a strongly recommended first step can be to inform their designated HR Business Partner and/or manager who can assist with transitioning in the workplace. Colleagues in transition may want as little notice or communication as possible given to co-workers about their transition.

For an HR Business Partner or manager to best support a Colleague's transition, they should be informed of the Colleague's "transition timeline." While timelines can and often do change, it is important for the Colleague to notify their HR Business Partner and/or manager about timeline changes so they may provide appropriate support.

At any point during the transition process, the Colleague or the Colleague's manager may request additional support such as:

- Vice President or Director of Human Resources or designee
- LGBT Employee Resource Group, including the Partners Transgender Alliance
- Employee Assistance Program (EAP)
- Diversity & Inclusion Office

What a Transitioning Colleague Can Expect From Management

The transitioning Colleague can expect their manager and HR Business Partner to support them to the greatest extent possible and to set the standard for co-worker responses to their transition.

Managers, supervisors, and co-workers should use the Colleague's correct name and pronouns in all communications with or regarding the Colleague, including official records, emails, and in-person and telephone conversations. Continued misuse of the Colleague's new name and pronouns or reference to the Colleague's previous gender expression by managers, supervisors, or co-workers is disrespectful and is considered harassment. If the transitioning Colleague feels that a continued misuse of pronouns/name is intentionally disrespectful, the Colleague should alert their manager or supervisor. The manager or supervisor should speak with the offending person and correct the pronoun/name use. If the misuse continues, corrective action may be taken.

Preparing for the Workplace Transition

The process of transitioning genders is unique to each individual and differs from person to person. While recognizing that transitions can be different, the following outline provides potential actions that a transitioning Colleague **may or may not choose** to take while working at Partners. While there are no "required" steps, some steps are strongly recommended for the transitioning Colleague’s comfort and safety in the workplace, and to assist them in obtaining appropriate institutional support.

1. The Colleague meets with their HR Business Partner and/or manager to discuss their intention to transition. The order in which the HR Business Partner and manager are informed is at the discretion of the transitioning Colleague. The Colleague may share their intent to transition in as much or as little detail as the Colleague deems necessary for the HR person and/or manager to know at the time. While acknowledging that this is the beginning of a conversation, the HR Business Partner and/or manager should ask how they can be of help in the immediate future and where the Colleague may need the HR Partner’s and/or manager’s assistance going forward. At this first step, the HR Business Partner and/or manager may review how Partners policies (Equal Employment Opportunity, Workplace Harassment, and Sexual Harassment) protect this individual. This step is strongly recommended.

2. The HR Business Partner, manager, and if desired, the Colleague, may meet with department leadership to inform them of the Colleague’s transition. If the Colleague desires an announcement, the department leadership may be informed and involved.

3. The HR Business Partner and manager should become familiar with educational resources, including resources such as EAP consultation and support to managers and educational resources. At this time, the transitioning Colleague and the HR Business Partner may consider if any other individuals should be engaged to assist the Colleague’s workplace transition. The HR Business Partner and manager should address any specific concerns of the Colleague, including safety concerns or identification of co-workers who may need extra support in understanding the process of a gender transition. Partners Safety and Security can act as a resource for the transitioning Colleague in the case of any threatening situation. This step is strongly recommended for the transitioning Colleague. Additionally, the Partners IS Account Administration team can provide a main point of contact for planning (pre-transition) and triaging issues that may arise (post-transition) as it relates to software systems that need updates (e.g. Outlook email address). Partners IS Account Administration team cannot update all

systems (e.g. HR needs to update PeopleSoft) but they can advise if they cannot and how to proceed.

4. The transitioning Colleague sets a tentative ***plan for transitioning in the workplace***. Recognizing that transition plans often can and do change, the Colleague is encouraged to provide the best possible timeline, as well as a list of objectives not included in the timeline (for instance, personal or external factors that may make planning a timeline difficult). Items to address in a plan may include:
    a. The date of the workplace transition (i.e., the first day of the change of pronoun usage and name). This date of the transition is established by the Colleague.
    b. How the individual’s colleagues, clients, patients and/or vendors will be informed of the change, as well as whether there will be differences in when or how such disclosures are made for different classes of people (co-workers vs. clients/patients). Before the date of the workplace transition, the Colleague may choose to talk to some of their co-workers individually.
    c. The identification of a potential surrogate (e.g., HR Business Partner, administrative assistant) to complete some of the administrative changes (e.g., name change on caller ID, badge update, etc.).
    d. Whether there will be an educational workshop (a “Transgender 101”) provided to staff. Educational resources will be coordinated by Human Resources with support from the Diversity & Inclusion Office.
    e. What changes will be made to records and systems with a gender marker, name, photo, or username and when they may need to be changed. Once this list of changes is completed, prioritize which objectives should be completed first, as many take time to process. Some items to consider:
        i. Change Outlook address and name associated by contacting IS’s Account Administration team.
        ii. Change email signature.
        iii. Change Partners Telephone Directory name and photo in ppd.partners.org, as well as the caller ID in the phone system.

iv. Get new Partners photo ID (at no cost to the Colleague) and have old one destroyed.
v. Change voicemail greeting.
vi. Change name and gender marker in PeopleSoft (a legal name and gender change needs to be done at the Social Security Administration for this change to occur, learn more in the section below[1]).
vii. Change name in any other system, application or database that the Colleague has access to (e.g. Egencia, InfoEd, Insight, etc.).
viii. Change Partners alpha-numeric log-in if desired (note: it takes IS two days to do this and the Colleague cannot log into any system during that time).
ix. Once the Colleague's name is changed in PeopleSoft, insurance carriers are notified. The Colleague should communicate directly with the insurance provider regarding any medical or insurance concerns relating to the transition.
x. If the Colleague needs to travel for their job, they may need to update their passport. Due to the extensive amount of work needed to update a passport, the manager will not deny professional travel for the Colleague if their passport does not have the new name and/or gender marker at the time of travel.

5. Make advance arrangements for name changes to be effective on the day of workplace transition, so that nameplates, badges, business cards, etc. will be available on the first day. See the list in "The First Day of Full-Time Workplace Gender Transition" below. Consider how long each of these changes in their respective systems may take while discussing advance arrangements.

6. Create protected time for the Colleague to coordinate and accomplish all the administrative changes that need to be made during work hours (e.g., the Social Security office is only open during regular business hours so the Colleague may need to use PTO.) It is recommended that

[1]The Colleague may need to show legal name and gender marker documentation (e.g., court order name change, new driver's license) to update PeopleSoft. To legally change a name and gender marker, the Colleague may refer to community resources from the ***EAP website*** which also includes information on how to change a name with the Social Security office, the Registry of Motor Vehicles and on an original birth certificate.

the Colleague allocate time before and after an event of making a change with a public office (e.g., going to the RMV to update a license name and photograph) as making these changes can be challenging and may involve transphobic interactions, and the Colleague may need time to recover before returning to the workplace.

7. Review a plan for the Colleague’s use of gender-specific facilities, such as restrooms or locker rooms. Please see more below in the section titled “Restroom and Locker Room Use.” Real Estate and Planning can provide a list of unisex/single-stall bathrooms in any building upon request.
8. Learn whether any time off will be required for medical treatment, if known. Plan how to allot for this time with PTO, FMLA, or other applicable time off. A Colleague’s medical transition may not be unreasonably delayed by their manager or their team because the timing is “inconvenient.” Given the limited number of informed and experienced transgender medical health professionals, Colleagues transitioning medically may have little choice in appointment scheduling.
9. Review Partners benefits and services that are available to support the Colleague’s transition at work, including but not limited to HR, EAP, Security, Occupational Health Services, Leave of Absence Coordinator, Chaplaincy/Spiritual Services, and Employee Resource Groups.

The Day of the Announcement (Optional)

The decision to make an announcement, as well as the format and timing of the announcement, is entirely the choice of the transitioning Colleague. Either the transitioning Colleague and/or their manager may make the announcement. They may also consider inviting the department director and HR Business Partner to show support. The Colleague and their manager may decide to make an announcement to the Colleague’s team, as defined by the Colleague. They may hold a workplace meeting or several meetings with the HR Business Partner, managers who work directly with the workgroup, and co-workers with whom the Colleague interacts. Remote co-workers may be included via teleconference. Partners policies (Gender Transition, Equal Employment Opportunity, Workplace Harassment, and Sexual Harassment) and other resource materials may be made available to all attendees. A meeting has the advantage of questions being addressed in an open forum, in a timely and sensitive manner, and displaying Partners support of the Colleague's transition.

Communicating the Colleague's transition is sensitive and the Colleague must guide this process. The Colleague may choose to be present at this meeting, depending on their comfort level. A transitioning Colleague may instead choose to send out an announcement in writing or by email. While both forms of communication are acceptable, written communication may be forwarded to others without the consent of the Colleague. To deter forwarding, the HR Business Partner and the manager should mark the email as confidential, and highlight that sharing the Colleague's transition information is against Partners policy.

After the announcement, the manager should:

1. Explain how Partners policy and guidelines affect the transitioning Colleague's co-workers.
2. State that the Colleague's new name and pronouns will be used in all future official and informal workplace communication. Once co-workers have been informed of the Colleague's new name and pronouns, the manager will state the expectation that they will not refer to the Colleague by their former gender or former name.
3. Make it clear that the Colleague's transition does not impact the business of the workplace.
4. Provide an opportunity for people to ask questions to the manager or HR Business Partner. If needed, offer an educational workshop on gender and gender transition in the workplace.

The First Day of Workplace Transition

The Colleague's manager should take the following steps on the first day of the Colleague's transition, as they would for a new or transferred individual:

1. Issue a new identification badge with a new name and photo.
2. Change the name on office door/desk/cubicle/workstation/uniforms.

3. Update any organization charts, mailing lists and other references to the new name.
4. Plan to be on site with the colleague if a transition announcement is made to support the Colleague, encourage respectful and inclusive treatment by co-workers, and ensure a smooth return to work.

Follow-up

The Colleague's HR Business Partner, if any, should check in periodically to stay updated on the transition timeline. The HR Business Partner should also be in touch with the manager to make sure that the workplace transition is going well and to offer continuing support to the team.

Where these guidelines will be available:

- All Partners HealthCare Institutions
- BWFH Policies and procedures
- BWHC LGBT & Allies Employee Resource Group Website
- Employee Assistance Program (EAP)
- MGH Policies and procedures
- MGH LGBT Employee Resource Group Website