

Gender Transition Guidelines for UPMC

1.0 SCOPE

- 1.1 **OBJECTIVE** – UPMC is committed to creating a culture in which the unique attributes of each person are understood, valued, respected, and utilized. To that end, the encompassed **Gender Transition Guidelines** provides the UPMC workforce with information to support an employee through a gender transition. These guidelines provide a plan to support the transitioning employee, her/his manager, co-workers, and Human Resources of respective roles, responsibilities, and expectations in the process. The guidelines are meant to be flexible enough to customize a transition plan specific to the circumstances of a gender-transitioning employee, yet specific enough to provide a consistent framework to manage the transition process. UPMC employees are encouraged to follow the protocols in this guideline when a transgender employee is transitioning. If at any point one is unfamiliar with the terminology or process surrounding a gender transition, it may be helpful to first contact the Center for Engagement and Inclusion for the necessary support and guidance.

2.0 DEFINITIONS

- 2.1 **Sex** - The term “sex” refers to the classification of people as male or female. At birth, infants are assigned a sex based on a combination of biological characteristics including: chromosomes, hormones, and reproductive organs.
- 2.2 **Gender** - The term “gender,” while often used interchangeably with “sex,” can refer specifically to the behavioral, cultural, psychological, or social traits typically associated with one sex, rather than biological characteristics.
- Note: “Male” and “female” are **sex** categories, while “masculine” and “feminine” are **gender** categories.
- 2.3 **Gender Identity** - The term “gender identity” distinct from the term “sexual orientation” refers to a person’s innate, deeply felt psychological sense of gender, which may or may not correspond to the person’s body or designated sex at birth (the sex originally listed on a person’s birth certificate).
- 2.4 **Gender Expression** – The term “gender expression” refers to how a person communicates gender identity to others through behavior, clothing, hairstyle, voice, or body characteristics such as dress, grooming, mannerisms, speech patterns, and social interactions — that are socially identified with a particular gender. Social or cultural norms can vary widely and some characteristics that may be accepted as masculine, feminine or neutral in one culture may not be assessed similarly in another.

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- 2.5 **Sexual Orientation** - The term “sexual orientation” describes a person's enduring physical, romantic, emotional and/or spiritual attraction to another person. Gender identity and sexual orientation are not the same.
- 2.6 **Transgender** - The term “transgender” is used for a broad range of people whose gender identity or gender expression is different from that typically associated with the sex assigned to them at birth. It can include transsexuals, cross-dressers, and those who are otherwise gender nonconforming.
- 2.7 **Transsexual** – “Transsexual” is a medical term for people whose gender identity and sex do not line up and who often seek medical treatment to bring their body and gender identity into alignment. **Avoid using this term unless an individual self-identifies as such.**
- 2.8 **Gender Transition** – The term “gender transition” is a process of going MTF (male to female) or FTM (female to male). The process can take some time and may include changes in dress, name, and gender identification; as well as hormonal and surgical therapy. A person modifies his or her physical characteristics and/or gender expression to be consistent with his or her gender identity. The process may also include telling one's family, friends and/or co-workers, and changing one's name and/or gender on legal documents. The transition process is generally conducted under medical supervision based on a set of standards developed by medical professionals.

3.0 GUIDELINES

3.1 Responsibilities

- 3.1.1 In collaboration with the Center For Engagement and Inclusion, Human Resources, Business Unit Management will:
- Create a gender transition plan for the transgender employee;
 - Develop a communications strategy to include employee's workgroup, other work colleagues, and patients/customers inclusive of when they will be informed of the change; and
 - Ensure compliance with all applicable UPMC policies.
- 3.1.2 The Center For Engagement and Inclusion will:
- Provide education and training for management and employees that require understanding of the gender transition process to foster inclusive workplace practices.

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3.1.3 Human Resources will:

- Ensure the transgender employee is treated in a manner consistent with his/her gender presentation;
- Include the transgender employee in planning the steps of transition;
- Provide the employee with an opportunity to first tell her/his manager and co-workers about their new gender identity;
- Partner with the employee and manager to develop a detailed plan to handle transition arrangements such as restroom use and transition date;
- Demonstrate the highest level of UPMC support for the transitioning employee;
- Maintain confidentiality until disclosure is made to the transitioning employee's co-workers;
- Enforce zero tolerance for harassment; and
- Periodically check in with the employee to monitor any changes or adjustments of the transgender employee.

3.1.4 Business Unit Management will:

- Assure the transitioning employee that management will work with her/him to help make their transition as smooth as possible;
- Confirm the date of the transition (i.e., the first day of potential change in appearance, pronoun usage and name, etc.) recognizing that the date of the transition will be primarily driven by the employee;
- Continue to treat the transgender employee as a respected and valued member of UPMC staff in accordance with UPMC values and standards;
- Communicate expectations that promote an inclusive culture at UPMC;
- Provide opportunities for education and training for staff;
- Communicate culture of inclusion to UPMC patients and families, as needed; and
- Provide regularly-scheduled meetings to follow-up with the transgender employee to address additional, potential ways UPMC can further assist the employee.

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- 3.1.5 The transgender employee may seek support and is encouraged to:
- Notify their manager, Employee Relations, and/or the Center for Engagement and Inclusion who will support in developing a transition plan process;
 - Communicate with management any changes that may impact job performance/patient care;
 - Initiate conversations with their co-workers to disclose plans before a general announcement;
 - Utilize a senior management sponsor to support communications, as needed;
 - Implement administrative changes as needed (i.e., obtain a new employee badge, collaborate with the appropriate Human Resources function to amend administrative and personnel records, etc.); and
 - Continue to maintain acceptable performance standards.

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4.0 MANAGER DO'S AND DON'TS

While each employee's transition is unique, nationally-recognized experts agree on the following guidelines:

4.1 Do

- Let the employee set the timetable.
- Respect the transgender worker's privacy.
- Select a point person—not necessarily an HR representative—who will listen to and assist the transitioning worker.
- Let the employee decide how to tell co-workers—in person, by e-mail, or conference call; individually, or in a group.
- Use the names and pronouns desired by the employee.
- Be vigilant against subtle forms of harassment, such as co-workers deliberately using the wrong pronoun or excluding a transgender worker from meetings or events.
- Recognize that certain employees may not be as comfortable as others with the transition. Help these employees by regularly communicating with them and providing learning forums as appropriate.
- Recommend *LifeSolutions*, UPMC's employee assistance program, to the employee.

4.2 Don't

- Don't ask personal questions about a person's medical or surgical history.
- Don't provide unsolicited "advice" on grooming and dress. This can feel demeaning.
- Don't "out" transgender colleagues or assume everyone is aware of a co-worker's transgender status. The decision to disclose is the employee's alone.
- Don't ask what someone's "real" name is. It implies the name they prefer is not real.
- Don't assume a transgender person's sexual orientation. Transgender people can be straight, lesbian, gay, or bisexual.
- Don't evaluate a transgender person by how successfully he or she conforms to an idealized gender standard.

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5.0 CHANGE NAME AND SEX DESIGNATION ON IDENTITY DOCUMENTS

While each state may vary, Pennsylvania residents have several significant steps to follow to fully change your name and sex designation on identity documents:

- Obtain a court-ordered name change;
- Amend your birth certificate;
- Change name and sex designation associated with the Social Security card;
- Change the name and sex designation on the driver's license; and
- Once legal name change has occurred, request a new UPMC ID Badge.

6.0 ADDITIONAL INFORMATION FOR GENDER-TRANSITIONING EMPLOYEE

The following is a partial list of the types of companies and agencies which should be notified of a court ordered name change as well as accounts and documents which should be changed to reflect the name change:

- Credit Cards Companies
- Utilities
- Deed to Real Estate (corrective deed may be required) and/or Lease
- Insurance Companies (auto, home, life, disability, medical)
- Loan Companies (student, auto, personal, mortgage)
- Banks
- Retirement Accounts
- Professional Licenses
- College/High School Transcripts and Diplomas
- Car Title, Driver's License
- Voter Registration
- Credit Reporting Agencies
- Selective Service (if born male)
- Vital Records in state of birth (for new birth certificate)
- U.S. Department of State (for new passport)
- Social Security Administration

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7.0 REFERENCES

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