



Transition Support Checklist for Staff	
	<p>This checklist seeks to provide guidance and support for individual members of staff who are transitioning. The <i>checklist may also serve as a resource for those individuals' line managers</i> as they help support those individuals through transition. Finally, this checklist may be used as a reference for colleagues of an individual who is transitioning who may wish to know more about the steps involved/support available for those individuals. It should be noted that this is intended as a guide only and may be amended to suit a <i>particular individual's circumstances or otherwise</i>.</p>
Date Completed	Task
	<p><input type="checkbox"/> Identify a main contact</p>
	<p>Identify a person as point of contact to support the individual and agree an action plan. This would usually be the line manager, or in some instances an HR Business Partner or senior member of the department. They should liaise with HR if the point of contact is not the HR Business Partner.</p>
	<p><input type="checkbox"/> Set timetable for key milestones</p>
	<p>Agreed key dates for actions e.g. changes to records, announcements/communications N.B consider confidentiality (what the individual wants disclosed) and data protection implications</p>
	<p><input type="checkbox"/> Make name and gender changes in Employment records</p>
	<p>An agreement between the individual and their manager (or HR Business Partner) to decide which records need changing, e.g.:</p> <ol style="list-style-type: none"> 1. Personnel records including contract, iTrent account, payroll, HMRC, pension and insurance records, as necessary 2. ID card/name badges 3. Email address and signature/computer log ins (via IT) 4. Profile on the University website(s)/ staff lists/ photographs <p>Once the name and gender are changed in the individual's iTrent account, HR will usually notify IT to change the name on the individual's current email account.</p>
	<p><input type="checkbox"/> Agree the date of living full time in the new gender in the workplace.</p>
	<p><input type="checkbox"/> Facilitate external name/gender changes (made by the individual)</p>
	<p>Any external communication the individual needs to have: individual to arrange for these documents to be changed themselves, as necessary, and to then provide any as required to the University for its records. The University may need to notify certain</p>

	<p>external organisations (e.g. payroll, HMRC, pensions and insurance providers) of a name and gender change. Such disclosure will be made on a ‘need to know’ basis.. Any other communication to be made on behalf of the individual must have consent, e.g. communication with charities and funding bodies should be agreed with the individual.</p> <ol style="list-style-type: none"> 1. HMRC 2. DVLA 3. HM Passport Office 4. Home Office 5. DBS 6. Relevant professional bodies 7. Bank or building society
	<p>Additional questions/issues to be considered</p>
	<p><input type="checkbox"/> Is the individual taking any extended time off? Is additional paid/unpaid leave needed?</p>
	<p><input type="checkbox"/> Is time off needed for medical appointments?</p>
	<p><input type="checkbox"/> How can ongoing non-medical procedures be accommodated? People may have other appointments relating to transition, such as laser hair removal, or sessions with a speech therapist; an individual transitioning female-to-male may require structured programme of exercise to maximise the effect of hormone treatment. Consider whether these could be accommodated by working flexible hours and/or homeworking.</p>
	<p><input type="checkbox"/> Is the individual having any planned surgery?</p> <p>Recovery periods may be short or extended, depending on the surgery, and any complications, and several surgeries may be needed. Staff will receive standard sickness leave, but may wish to discuss the possibility of additional paid/unpaid leave.</p>
	<p><input type="checkbox"/> What arrangements have been made to ensure the individual is able to return to work? The Occupational Health Service may help to plan a phased return to work.</p>
	<p><input type="checkbox"/> Are any temporary adjustments needed to duties during hormone treatment or following surgery? e.g. avoiding heavy lifting. Individuals may experience fatigue or mood fluctuations. (A referral to Occupational Health may be made for advice on any adjustments required).</p>
	<p><input type="checkbox"/> Should any permanent changes to duties be considered following medical treatment (for example in the case of a job where physical strength is required)?</p>
	<p><input type="checkbox"/> Are there any risks to the individual e.g. in relation to third parties or media intrusion, and how will they be handled?</p>
	<p><input type="checkbox"/> Has workload during transition been discussed with the manager? There may need to be some flexibility on deadlines, especially if there are unexpected side effects or surgical complications.</p>
	<p><input type="checkbox"/> Which facilities (toilets, changing rooms etc) will be used and from when?</p>
	<p>Support for the individual</p>
	<p><input type="checkbox"/> Does the individual have a support network? Be sensitive to the fact that transitioning is a time that family/friendships/personal relationships may be strained and some individuals may be isolated from their previous support network.</p>
	<p><input type="checkbox"/> Is the individual receiving gender identity counselling through a specialist clinic?</p>
	<p><input type="checkbox"/> Is the individual aware of the LGBTQ+ Staff Network?</p>

	<input type="checkbox"/> Is the individual aware of the University's Employee Assistance Programme? Is the individual aware of the University's Mental Health First Aiders?
	<input type="checkbox"/> Is the individual aware that support may be available through trade unions?
	Communication
	<input type="checkbox"/> How and when will colleagues and students in department and University be informed? Can a statement be agreed? Does the individual want to do this themselves or do they want this to be done for them and if so by whom?
	<input type="checkbox"/> How and when will external contacts be informed?
	<input type="checkbox"/> Is there a training need (e.g. for colleagues)?
	Overseas travel
	<input type="checkbox"/> Does the role require travel? A risk assessment should be carried out to determine whether the individual may be at risk because of their trans status. How will the individual get medical care, including obtaining medication? Heads of Department delegate the responsibility for risk assessment to individual managers, with advice from department safety officers.