



Supporting Transgender Individuals in the Workplace

Checklist for Human Resources Professionals

This document gives HR professionals a checklist they can use to guide their discussions with new transgender employees. This could mean someone who has already transitioned to their correct gender expression, or someone who will be transitioning while working. This checklist, along with the Workplace Transition Plan and Guidelines for Gender Transition in the Workplace, support the transgender individual and the HR professional in ensuring smooth transition planning and implementation.

Items to discuss with transitioning individual(s):

Confirm individual's chosen name and chosen gender pronoun(s).

[Gender Inclusion Policy](#) and [EEO Policy](#): Make sure individual understands their rights.

Working environment: Does the individual anticipate challenges or can the individual identify support?

Appearance and attire expectations: Appearance and attire should correspond with their gender identity and/or expression and align with departmental dress codes.

Restroom and facilities use: Make sure they know they can use any bathroom that corresponds to their gender identity, and that harassment will not be tolerated.

Potential training: Ask individual if their work unit could benefit from cultural competency training in this area.

Training may be provided with the assistance of the [Office of Transgender Initiatives](#).

Ongoing support: Provide opportunity for individual to schedule check-ins or other future meetings.

If individual is transitioning and will take leave during this time:

Does the individual need time off? Be sure to advise them about sick leave and other leave options.

Health insurance, life insurance, and other benefits are managed by the [Health Service System](#).

If individual will be changing their legal name:

Legal name change: Legal name change is required for payroll and retirement accounts. If the individual requests information on legal name change, direct them to the Transgender Law Center's ["ID Please CA" document](#).

Retirement benefits: Help individual connect with SFERS.

New W-4: Data can be updated in employee portal if on self-service. If not, help individual submit form.

Required Action Items

Provide transitioning individual with copies of the Gender Inclusion Policy, Guidelines for the Transitioning Individual, and Guidelines for HR and Management, and/or provide website linking those documents

Work with DHR to create new City ID badge

Update departmental staff directory

Conduct search of all web and intranet sites to ensure they reflect individual's chosen name and gender

Work with DT to update individual's email account and computer username

Work with DT to update individual's phone line (the name display)

Update individual's People & Pay information

Replace name plate (if applicable)

Replace photos on display (if applicable)

Provide new W-4 form (if applicable)

Order business cards (if applicable)

Update parking or bicycle pass (if applicable)