Workplace gender affirmation checklist

Confidential – contains personal and health information.

The workplace gender affirmation checklist is designed as a guide for employees, managers and other relevant areas of the department supporting an employee affirming their gender.

Additional steps may be included, and others removed, as agreed between the employee and their manager.

This checklist may be used by an employee to develop their own plan or to tailor the workplace gender affirmation plan template.

At the core of this process is the employee, and written consent is required before the disclosure of any information about an employee's gender affirmation and gender.

Planning

Task	Complete	Responsibility	Notes
1. Employee consultation			
Identify a manager or key contact for the employee.			
Discuss and agree on the preferred method/s of consultation and communication between employee and manager or key contact.			
Map out roles and responsibilities for key people involved in the process and timeframes including points of contact in ITD, HR, D&I, etc.			
Identify and agree on the role of a support person if required.			
2. Privacy and confidentiality			
Discuss the boundaries of what information the employee is comfortable sharing and with whom and when.			
3. Consider necessary communication (colleagues, internal and external stakeholders)			
Map out who will need to be informed and when.			
Plan how the information will be communicated and when			
4. Identify systems that require change			
Identify with ITD a contact point for: • computer log in • display name • email address/signature block			

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Task	Complete	Responsibility	Notes
• identifying information in IT systems • software systems • internal social media accounts • any other databases or staff directories. **Note:** changes to systems and records that normally use a preferred (affirmed) name do not require documentary evidence.			
Identify with HR contact point: • personnel details • security pass • any other HR systems.			
Identify what documentation will need preparing to implement these changes.			
5. Discuss leave			
Discuss leave requirements and available leave entitlements for leave approval. Consult with D&I if needed.			
Discuss flexible working options as required.			
Leave approval.			
6. Document process			
Discuss and agree on a plan to support affirmation. Example plan template is at Attachment B if required.			
7. Review			
Review as required and in consultation with relevant people.			

Affirmation

Task	Complete	Responsibility	Notes
1. Employee - prepare and provide documentation			
Collate any required documentation for leave approvals and/or system and record changes.			
Provide any required documentation to point of contact.			
2. Update systems and records			
ICT • computer log in • display name • email address/signature block • identifying information in IT systems • software systems • internal social media accounts • any other databases or staff directories.			
HR • personnel details • security pass • any other HR systems.			
3. Uniforms and facilities (optional)			
Source uniform/dress code information and order forms as applicable to business area, role type or work location.			
Order any new uniform garments within applicable timeframes.			
4. Inform colleagues and relevant stakeholders			
Inform colleagues and relevant stakeholders in line with agreed communication protocols.			
5. Provide resources for colleagues			
Manager to ensure that resources are available to support colleagues around gender diversity.			
Manager to ensure that staff have access to necessary training and advice should they need it.			