

WELSH GOVERNMENT HR POLICIES

TRANSITIONING (Transgender)

1. The Welsh Government is committed to supporting employees whose gender is other than that assigned at birth. This includes those who have undergone, are undergoing, or are proposing to undergo gender reassignment (or part of that process), those intending to or already living in a new gender role, those whose gender is non-binary and those who are intersex. We are committed to providing a safe and supportive working environment free from discrimination, harassment, and intimidation. We are committed to ensuring that complaints of discrimination and harassment are dealt with quickly, effectively, and confidentially.
2. We aim to ensure that the Welsh Government is viewed as an organisation that all sections of our community would consider a good place to work: a safe place where equality and diversity is valued and respected.
3. We aim to prevent any form of discrimination where an individual is proposing to undergo, is undergoing, or has undergone gender reassignment (or part of that process). This will be achieved by:
 - setting a clear process in relation to absences resulting directly from the process of gender reassignment
 - setting a clear process for any changes that are needed in the workplace when a person goes through gender reassignment
 - having clear guidance on how gender reassignment affects pre-employment or other security background searches conducted on behalf of the Welsh Government
 - ensuring that confidentiality is appropriately maintained in connection with an individual's gender reassignment and fulfils legal and statutory obligations
 - treating any complaint of discrimination or harassment very seriously.
4. Please note that all of our policies are fully inclusive of all staff regardless of age, marriage (including equal/same sex marriage) and civil partnership, disability, sex, sexual orientation, pregnancy and maternity, race, religion or belief, gender identity or gender expression.¹
5. [The Guidance and Procedures to support the implementation of this policy can be accessed by clicking here.](#)

WELSH GOVERNMENT HR GUIDANCE AND PROCEDURES

TRANSITIONING (Transgender)

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Related Welsh Government Policies / Guidance

[Attendance Management Policy](#)

[Dignity at Work Policy](#)

[Grievance Policy](#)

[Special Leave Policy](#)

[Special Leave Application E-Form](#)

[Equality and Diversity Policy](#)

[Recruitment Policy \(see Equality Statement\)](#)

[Workplace Adjustment Passport](#)

[Stress and Mental Health \(including Risk Assessment Form\)](#)

Useful Links

[PRISM - the Welsh Government's LGBT staff network](#)

[A:gender – the civil service support network for trans employees](#)

[Gender Recognition Act Guidance \(HM Courts and Tribunals\)](#)

[Stonewall guidance for supporting trans staff in the workplace](#)

[The Workplace and Gender Reassignment: a guide for staff and managers](#)

[Providing Services for Transgender Customers](#)

[Recruitment and Retention of Transgender Staff](#)

[Welsh Government Employee Assistance Programme](#)

[Welsh Government Occupational Health Team](#)

[ACAS - Avoiding Gender Reassignment Discrimination in the Workplace](#)

1. [THE POLICY](#) *(click to access)*

1.1 In conjunction with the Policy and this guidance, we suggest that you also read the following:

- A:gender guidance for staff and managers called '[The Workplace and Gender Reassignment](#)'
- [Stonewall's guidance on trans inclusive policies](#)
- [Guidance to the Gender Recognition Act 2004](#)

2. ROLES AND RESPONSIBILITIES

2.1 Employees are responsible for:

- making themselves familiar with the policy and this guidance

2.2 Managers are responsible for:

- consulting the HR Business Partners if they have any concerns and or wish to discuss matters about the absence or proposed absence in relation to transitioning, or if they wish to raise points in relation to the operation of the policy and this guidance
- being guided by appropriate medical advice given by the employee's doctor or the Welsh Government's Occupational Health Adviser via the HR Case Advisory Team (CAT)
- where possible, agreeing in advance the amount of special leave allowable in respect of absences resulting from the process of transitioning and the dates to which it applies. Also considering applications to cover unexpected absences in exceptional cases such as where a doctor unexpectedly orders immediate treatment
- keeping in touch with the employee and being guided by their wishes as far as possible.
- ensuring that any medical certificates covering absences relating to the transitioning are forwarded promptly to the Corporate Shared Service Centre to be annotated on the employee's personnel record.
- following the policy and this guidance on maintaining confidentiality of individuals undergoing transitioning

- Using the Checklist at Annex B, to aid discussion if requested by the employee with the employee and also Annex C to ensure that all necessary steps are taken – both if preferred by the employee
- Supporting the use of a Workplace Adjustment Passport and any reasonable adjustments

2.3 The HR Case Advisory Team is responsible for:

- advising on all aspects of the policy and this guidance and procedures;
- seeking Occupational Health advice as and when necessary and advising employees and managers;
- following the guidance on maintaining confidentiality of individuals undergoing transitioning

2.4 The Corporate Shared Service Centre is responsible for:

- processing requests for special leave where authorised by the line manager via the Special leave E-Form
- keeping a record of the amount of special leave in respect of absences resulting from the process of transitioning
- Supporting the employee in respect of changes to personnel records e.g. name and title
- following the guidance on maintaining confidentiality of individuals undergoing transitioning

2.3 HR Business Partners are responsible for:

- advising employees and line managers on the policy and this guidance and signposting to relevant guidance and support mechanisms

3. GUIDANCE ON TRANSSEXUALISM AND GENDER REASSIGNMENT (TRANSITIONING)

3.1 What is transsexualism?

3.1.1 Transsexualism is a term that, in the past, was used to describe those undergoing medical gender reassignment, and is no longer generally used and it can be offensive to some people to be referred to as a transsexual. Transgender people experience a sense of their gender which does not match the gender assigned to them at birth so that, for example, someone who has been assigned as 'male' at birth, raised as a boy and who has lived their life regarded by everyone as a man, may regard their true self (or 'gender identity') as more closely aligned with the female gender. A person assigned 'female' at birth may similarly identify with the

male gender. Some people may identify as a combination of both, or of neither. Gender dysphoria is a term used to describe the sense of distress that may accompany the mismatch between a person's gender identity and their assigned gender. It should not be assumed that the goal of every individual's transition is to change their physiology or legal gender. If a trans person chooses not to undergo any medical intervention or gain a GRC, they are still entitled to dignity and respect along their chosen path of transition, whatever that may be.

3.1.2 Depending on the degree of gender dysphoria, people with this condition find themselves inexorably driven to live in their acquired gender. Resistance to this drive, usually as a result of social pressures to conform to society's norms and expectations, frequently leads to intense anxiety, depression and, sometimes, suicide. The accepted way of relieving the condition is for the individual to 'transition' to the gender in which they feel comfortable. Attempts in the past to alter a person's established sense of gender identity have been inevitably unsuccessful, and can lead to mental ill-health. Physiological reassignment treatments have high success rates.

3.1.3 Some trans people seek medical assistance to make their body conform with their gender identity through a variety of medical interventions, but this will vary from individual to individual. Many trans people have not undergone, nor do they intend undergoing, any form of surgery. It should not therefore be assumed that the goal of every individual's transition is to change their physiology or legal gender. If a trans person chooses not to undergo any medical intervention or gain a Gender Recognition Certificate, are still entitled to dignity and respect along their chosen path of transition, whatever that may be.

3.1.4 The provisions of this guidance are also intended to support intersex and non-binary staff.

3.2 The Legal Framework

3.2.1 The Equality Act 2010 says that a person must not be discriminated against because they are a transsexual person. For example a person who was born female decides to spend the rest of his life as a man. In the Equality Act it is known as gender reassignment. All transsexual people share the common characteristic of gender reassignment.¹

3.2.2 To be protected from discrimination related to gender reassignment or, our preferred term 'transitioning', an individual does not need to have undergone any specific treatment or surgery to change from their birth sex to their preferred gender. This is because changing physiological or other gender attributes is a personal process rather than a medical one. They can be at any stage in the transition process – from proposing to reassign gender, to undergoing a process to reassign gender, or having completed it.

¹ Our policy and guidance treats 'gender identity' as a protected characteristic rather than 'gender reassignment' as the term used in the Equality Act 2010

3.2.3 The Equality Act contains specific provisions dealing with absences from work because of transitioning. This includes the need not to treat a transsexual person any less favourably in relation to such absences than they would be treated in relation to sickness absence.

3.2.4 The Act provides that it is discrimination to treat a person undergoing transitioning less favourably. Gender reassignment in UK law is a primarily social process of intending to live or already living in the new gender role.

3.2.5 The Act also places a general statutory duty on all public authorities and other bodies exercising functions of a public nature, when carrying out their functions, to have due regard to the need to:

- eliminate unlawful discrimination, harassment and victimisation;
- advance equality of opportunity between different groups; and
- foster good relations between different groups.

3.2.6 In the context of employment policies and procedures, public authorities and other bodies exercising functions of a public nature are required to ensure that they adequately cover trans employees – giving particular attention to confidentiality, harassment, allocation of resources, recruitment, training, secondment, internal job vacancies, career development including promotion, pensions and other benefits such as insurance

3.2.7 [The Gender Recognition Act 2004](#) provides legal recognition of people in their acquired gender. Under this Act, a person is able to apply to the Gender Recognition Panel² for legal recognition of their acquired gender, following which they may be given a Gender Recognition Certificate (GRC) that recognises the acquired gender and allows the individual to apply for a new birth certificate in that gender.

3.2.8 A person does not require a GRC to live in their acquired gender – the Gender Recognition Act only confers legal recognition of that gender in certain areas. Some trans people will not be able to gain this legal recognition, for example, if they have lived less than two years in their acquired gender or if they continue in a marriage that existed at the time of their gender transition. In such cases, the gender at birth will continue to apply for some legal purposes, even though they are otherwise entitled to live their lives in their acquired gender. It is very important to ensure that there is no discrimination against trans people even though they do not hold a Gender Recognition Certificate. The Welsh Government will amend all records to match the new gender although HMRC and Pension provisions may only be changed once a new birth certificate is obtained following the receipt of a GRC.

² The [Gender Recognition Panel](#) assesses applications from transsexual people for legal recognition of the gender in which they now live. The Panel was set up under the Gender Recognition Act 2004 and ensures that transsexual people can enjoy the rights and responsibilities appropriate to their acquired gender.

3.2.9 Data Protection Act 1998 - Under this Act, gender identity and gender reassignment would constitute 'sensitive personal data' for the purposes of the legislation and must be processed as such.

3.2.10 Human Rights Act 1998 [Article 8](#)

3.3 Confidentiality

3.3.1 The Welsh Government will not disclose if anyone is trans or that they have gone through, propose to or are going through transitioning unless it obtains their written consent to do so and will treat them no differently or no less favourably from any other employee.

3.3.2 The employee may want to tell their manager about their situation so that they can provide support but the manager must not tell anyone else without the employee's permission. If an individual is content for colleagues to be told, then the Manager should discuss with them the method, and agree a communication plan (see Annex B)

3.3.3 Employees going through transitioning and who require special leave under the policy, and this guidance, where no one in their office, including their manager, is aware of this, or who prefers not to disclose their status should contact the HR Case Advisory Team (HR CAT).

3.4 Discrimination, Intimidation or Harassment

3.4.1 The Welsh Government will not tolerate discrimination, intimidation or harassment on the grounds of transitioning and will treat a complaint of discrimination on these grounds seriously. Discrimination, intimidation or harassment on the grounds of transitioning will lead to disciplinary procedures being instigated which may result in action up to and including the dismissal of any employee who is found to have acted in this way.

3.4.2 Discrimination by association or perception is also unlawful under the Equality Act 2010. For more information on discrimination and harassment please see our [Dignity at Work Policy](#).

3.5 Absences resulting directly from the process of transitioning

3.5.1 Absences resulting directly from the process of transitioning will be dealt with as paid special leave, unless the absence is for half a day or less, in which case it may be recorded as a flexi credit.

3.5.2 This will remove any disadvantage associated with such absences as, where granted, the absence will not count towards reduced pay or absence management.

3.5.3 Special leave is not available to cover any other sickness absence, even if indirectly due to transitioning. For example, a manager will not grant special leave for absence for, as an example, shingles, even if the doctor suspects it results from having had major surgery. For further examples of what is covered and what is not, refer to the table at Annex A. Where the position remains unclear, employees and managers can seek further advice from the occupational health advisor via the HR CAT.

3.5.4 Special leave for absences arising directly from transitioning does not affect an employee's entitlement to special leave for other reasons. Applications for special leave for other reasons should be considered under the Special Leave Policy disregarding any special leave for transitioning.

3.5.5 Employees may apply for special leave where

- they advise of their intention to undergo, are undergoing or have undergone transitioning;
- the period of absence is directly due to the process transitioning as included in the table below.

3.5.6 Employees who wish to apply for special leave for absences resulting from the process of transitioning, must first have advised their manager of their intention to undergo gender reassignment (except where the HR CAT have been involved as set out in paragraph 3.3.3). Employees can apply to their manager using the [Special Leave E-Form](#) for special leave to cover such absences. These can be granted in principle even if the period of absence is not known in advance of the start of the absence period and needs to be established on return to work. Since the E-Form application automatically fires a notification to the line manager, the HR CAT will support the employee to make an application manually.

3.5.7 Employees should provide a Fit Note for any absences over 7 calendar days and keep their manager informed about the period of absence while they are off work. To protect confidentiality, medical certificates should not specify detail of the transitioning, e.g. the cause of absence may show "operation" rather than "gender reassignment surgery".

3.5.8 Although the majority of these absences should be approved in advance, managers (or the HR CAT) may approve special leave in respect of absences resulting from the process of transitioning after an absence has been taken:-

- to cover unexpected absences in exceptional circumstances, for example, surgery is arranged at short notice due to a cancellation, or
- where the manager (or the HR CAT) was not able to make a decision in advance.

3.5.9 In such cases employees should write to their manager (or the HR CAT), as soon as possible, stating the reasons why they believe the absence should be granted as special leave.

3.5.10 The exact amount of paid special leave will vary as managers (or the HR CAT) will consider each case on an individual basis. Overall, the maximum normally allowable is 92 days in any 12-month period but a greater amount may be allowed in the 12 month period following major surgery, subject to Occupational Health advice, which will be provided via the HR CAT.

3.6 The Impact of this type of absence on managing poor performance and attendance

3.6.1 All periods of absence resulting directly from the process of transitioning and dealt with as special leave will not be considered in poor performance issues or count as poor attendance. However, managers and the HR CAT will take any absence not resulting from the process of transitioning into account when deciding whether or not to apply poor attendance procedures.

3.6.2 The table at Annex A shows examples of eligibility for paid special leave, but employees should try to arrange appointments outside normal working hours if possible.

3.7 Changes within the Workplace – For more advice see Annex B – the Gender Transition Template

3.7.1 Change of duties - A member of staff undergoing transitioning may request to have a change in their duties, but they should not be expected or required to do so. Employees will be supported to remain in their current role - for example they may wish to avoid heavy lifting or may request to be moved from a public-facing role. Such a request will be considered in line with the business needs of the organisation.

3.7.2 Pensions - Changes to an employee's gender may affect their pension benefits. The HR CAT will work with the [Pensions Team](#) to ensure a smooth administrative transition.

3.7.3 Uniforms - If an employee in a public-facing role which requires the wearing of a uniform is undergoing transitioning, they will need to arrange a new uniform with their manager (or the Corporate Shared Service Centre)

3.7.4 Disclosure - The employee is encouraged to work with the HR CAT and their manager to use a gender transition template to plan for informing colleagues of their gender reassignment and their transition to their acquired gender.

3.7.5 Use of Welsh Government facilities - Welsh Government recognises that employees know how to choose the facilities that match their gender identity. Employees cannot be asked to use alternative facilities, such as the accessible or gender neutral toilet. We have gender neutral toilets in some of our offices (all single-user toilets are gender neutral.)

3.7.6 Handling of media interest - Should the media take an interest in the transitioning of an employee, the individual concerned should work with their manager (or the HR Business Partner) and the media team to handle any enquiries sensitively.

3.7.7 Change of name - Some records will need to be changed before, or on an employee's first day in their acquired gender. Any member of staff, regardless of gender or acquired gender, can choose to use the gender neutral title Mx, if they so wish. Employees should work with the Corporate Shared Service Centre to change records. See Annex C (including note re: Diversity Data) for reassignment.

Annex A – Absences eligible for Special Leave in Transitioning

Reason for absence which ARE eligible for SL

1. Appointments with psychiatrists, psychologists or counsellors to

- assess gender dysphoria, in relation to the condition generally, not just in relation to work.
- support through the process of transitioning
- provide referrals for medical interventions that will help to live and work effectively in the acquired gender

2. Appointments with healthcare professionals for blood tests, blood pressure monitoring, hormone therapy consultations and injections

3. Surgical interventions that will help the individual to live and work effectively in the acquired gender :

- genital surgery
- breast surgery, including mastectomy, augmentation and correction of asymmetry
- throat surgery (Adam's apple removal/reduction and/or vocal chord surgery)
- facial feminisation surgery, for example rhinoplasty (nose re-shaping)
- hair transplantation

To include the surgery itself, any hospital stay and the immediate recovery period (the period for which a specialist explicitly instructs a patient to restrict their activities and not return to work in order to not jeopardise the benefit of the procedure) and any complications directly arising from the operation.

4. Appointments required for pre-surgical assessment and post-surgical follow-up, including pre-surgical hair removal from the area to be subjected to surgery. This will include the genital area and also other areas of the body from which any donor skin/flesh is taken.

5. Facial hair removal for gender reassignment purposes

6. Speech therapy

Reasons for absence which ARE NOT eligible for SL

7. Appointments with healthcare professionals for a:

- general check up
- reason unconnected with the transitioning
- reason not directly related the process of transitioning

8. Treatment for any illness or condition not directly related to the process of transitioning.

GENDER REASSIGNMENT - TRANSITIONING TEMPLATE

These notes, accompanying the gender transition template, are written from the perspective of the individual undergoing transitioning, but are equally intended to assist the manager of such an individual.

Please note: The use of the template is optional, and the level of detail entered is purely a matter for the individual. The individual and manager may use it simply as an aide-memoire of the possible steps which transitioning may take, or they may fill it in together as the individual’s plans for transitioning emerge. Managers should not impose the use of the template on an individual nor use it to dictate the pace of all or any part of the transitioning process.

Under no circumstances should this information be passed to anyone else without the express permission of the individual undergoing transitioning.

Things to think about:

1. Information before you disclose your intentions:

If you wish to talk to other trans people about their experience in the workplace, you can contact

- PRISM – WG Staff LBGT+ network, who can provide peer support.
- XXXXXXXXXXXXX

2. Telling people about your situation:

Who to tell first? You have a choice:

- HR Business Partner
- Your manager
- A close colleague or colleagues
- PRISM
- Your union representative

- Colleagues - colleagues are obliged to keep your information confidential unless you give permission to do otherwise. If telling close colleagues, you should ask them to keep the matter confidential if this is what you wish.

3. Planning your gender reassignment:

It helps everyone if you can plan your transition. It won't be possible to be too precise to start with and much will remain flexible around any medical treatments and your own intentions. You should not feel pressured to make your gender change at work until **you** are ready. Similarly, you should not be pressured in any way to unnecessarily delay your transition.

You can make plans directly with your manager if you are happy to do so, or you might prefer to have someone else in the office as a confidential contact and co-ordinator for your gender transition (a sort of personal project manager or mentor).

Try to plan the following. Each of these is dealt with in further detail below:

- telling your colleagues what is going on
- getting ready for your first day in your new role
- changing things to your new name
- any medical appointments and absences

The template may be used to help you and your manager, to make sure things get done when you need them to, and people get to know what they need to know about your plans when they need to know them.

4. Your medical appointments and absences

In order to treat gender dysphoria, you may require medical assistance and undergo a variety of medical interventions which are included in the template, though you may not require or want them all as part of your own transitioning.

At the date of your gender transition, you are unlikely to know what forms of intervention you will need or when, although you may have some idea. As your treatment plan develops with your own medical advisors, you will be able to provide more detail as time goes on, so that your manager or 'project manager' can be given precise dates on which you will be absent.

The Welsh Government has an interest in helping you develop confidently in your new gender role and will support you as far as possible in doing so. You can help this by planning your absences around your work as far as possible in advance. The Welsh Government recognises that certain hospital appointments cannot be changed without jeopardising your treatment schedule.

The Welsh Government's policy and this guidance on transitioning absences provides for special leave to cover such absences up to a limit, but only where the absence is directly arising from the transitioning process. Time off for the absences that result from these causes should be dealt with as set out in the guidance. Please refer to this (above) for more information, including a list of the types of absence that are regarded as arising as a result of transitioning.

5. Telling your colleagues what is going on

At some stage you will need to tell your colleagues what is happening to you. Your manager or project manager will help you here. Only tell your colleagues when you are sure you are ready. It is impossible to cover all the possible courses of action, but here are a few ideas to help you work out an approach that will suit you:

- **tell people face-to-face individually or in groups.** You may want to tell people your news personally, particularly if they are close colleagues. But it can be emotionally stressful.
- **ask your manager/mentor to tell people for you.** Your manager/mentor could tell people you work with, in a group or at their own team meetings. The content of such news should always be agreed with you first, and the occasion agreed by you as appropriate. (But do remember, your manager may find it difficult to tell people without your help.)
- **use photos.** At this stage you'll still be at work in your old role, and people may not have met you in your new identity. If you have good photos of how you look in your new role, this may help people envisage the new you.
- **pass on your news in other ways.** You could for example use an office newsletter, intranet site or e-mail to let people know, but you should discuss and agree with your manager beforehand what you wish to do.
- **carry out awareness sessions.** These could be arranged to inform colleagues of the background to your condition. Experienced trans people from PRISM or other support networks may be able to assist if required. You do not have to present the session yourself. Your colleagues should know that PRISM can support them also.
- **answering questions.** People will be naturally curious and may ask intrusive questions. It is helpful for people to be well-informed about what is going on, but it is up to you what you feel you wish to tell people and when.

Whilst some colleagues may ask inappropriate questions due to a lack of knowledge, the Welsh Government will not tolerate discrimination or harassment on the grounds of transitioning and will treat a complaint of discrimination on these grounds seriously.

If you feel that continued mistakes amount to harassment you should initiate proceedings under the Dignity at Work policy

- **using the grapevine.** At some stage, your news **will** become common knowledge and you may be the subject of gossip. Some people use this as a convenient way of spreading their news beyond their close colleagues, but you may find it offensive if some of the gossip is ill-informed. Clear early communications of the types mentioned above may help combat this.

6. Getting ready for your first day in your new role

This will be your first real day at work, when you arrive in your new identity. You can then expect people to treat you in your new identity, to use the toilet, changing and shower facilities appropriate to your new gender and for people to call you by your new name. You will hope for lots of support from your colleagues, but most of all, it is up to you.

- **When will it be?** At some stage you will need to decide when you'll start work in your new gender. You may discuss this with your medical advisor/counsellor, and also with your manager/project manager in making your decision. You will need to tell your colleagues when to expect you (see 5 above).
- **Changing your records** - There are some things you need to change before you start work in your new role, but others can wait - look at 7 below for more detail.
- **Shedding your old identity.** It may be helpful to plan your first day after a natural break, such as a weekend or a holiday. This does help work colleagues to see the old and new Gender Role person as two separate people to some extent. Saying goodbye to the old gender role person can be a little like a bereavement, for you or colleagues. It's important to allow work colleagues a little time, if only a couple of days, to come to terms with the permanent loss. However, people should be encouraged to be happy for you and perhaps celebrate the occasion of your first day at work, as something akin to your birthday.
- **Do you need a change of role?** Your work may involve you in meeting people or talking on the phone. You may or may not feel confident enough to carry out these duties in your new gender from the outset. You should discuss this point with your manager as early as possible if you feel you may need a temporary change of role, but you should not be pressured to change your role if you feel this is unnecessary.
- **Are you ready?** Starting work in your new gender can be challenging. You may feel people are staring at you and you may feel uneasy about actually coming into work on your first day. Do not start in your new role until you are ready. A colleague may be willing to bring you in on your first day if this helps.
- **Is your wardrobe ready?** Your need will depend on the sort of work you do, but all staff are generally be expected to attend the office suitably attired, be it casual or smart. Bear in mind that staff have to last the whole day and get home again, so should choose clothing and footwear that they feel comfortable with and that is also suitable for both work and travel. If you would like help with your appearance, is there anyone at work who might help you out?
- **Are your colleagues ready?** You might wish to meet people in your new role outside the office before you first come in for work, perhaps for lunch or at a social function. These might be colleagues who have agreed to support your transition in some way.

- **Can you get into work OK?** Make sure you have your travel and work pass organised before your first day to avoid any unnecessary problems on your way to work.
- **Use of facilities.** Welsh Government recognises that employees know how to choose the facilities that match their gender identity. . Employees cannot be asked to use alternative facilities, such as the accessible or gender neutral toilet.
- **The Media:** Sometimes the media take an interest in transitioning. If you are approached by the media about your role in the Welsh Government, do **not** talk to them. You should refer them to the Communications Team, and then immediately inform your manager/project manager and ask them to advise the Communications Team that an approach has been made to you.

7. Changing records and so on into your new identity

You will also face the task of changing all your records. Some you need to do before or on your first day. Others can be done afterwards.

- **your travel pass & photo:** do this before your first day, to avoid embarrassment on your journey in to work.
- **your work pass & photo:** if you can't come in before your first official day at work to get your new pass with a photo of you in your new identity, arrange for someone to escort you into your building on your first day and to organise your new pass as soon as possible You should keep your photo updated to reflect changes that might affect people that need to recognise you.
- Your Business Directory photo – when you have your security pass re-issued, you should request the Business Directory mailbox to update your photo there.
- **your name:** you will need to change your name on name badges, telephone lists, letter templates and all sorts of things in your office. You will also need to let your colleagues know by what name you are to be called. Your manager/project manager and awareness sessions should ensure that your colleagues are aware of the need to use your new name and the pronouns appropriate to your new role. But they might forget sometimes, particularly to start with! Please allow people time to adjust.
- **your e-mail:** the ICT Helpdesk will be able to set up a new e-mail address for you in your new name while retaining access to the old e-mail address for a temporary period until people stop sending mail to your old named account. The Corporate Shared Service Centre will intervene to ensure this process is carried out as quickly as possible including arranging new log-in details
- **Please note your payroll number and HR Self Service (previously U-Access) number will remain unchanged.**
- **your HR and pay records, including iPayview:** contact the Corporate Shared Service Centre to ensure that all the necessary changes are made to your records.
- **Your SAP username**

- **your pension record:** until you obtain recognition in your acquired gender under the provisions of the Gender Recognition Act, your pension entitlement will remain that of your birth gender, which currently affects, for example, the cost of Additional Voluntary Contributions You should write to the [Corporate Shared Service Centre](#) to inform them of your change of name and title, even if you are not changing your legal gender. If you are married and intend to remain so, it may be worth submitting your marriage certificate at the same time, to ensure that no difficulties arise over your spouse's entitlement should you die.
8. If you are using the template below as a planning document for your own personal use, don't forget to keep your plan up to date.

GENDER TRANSITION TEMPLATE:

	What, who or how?	When?
1. Information before you disclose your intentions:		
Have you read the Welsh Government's policy and guidance on transgender employees?		
2. Telling people about your situation. Who have you told:		
HR		
Your manager/mentor		
Close colleagues		
Your union rep		
Anyone Else		
3. Planning your transitioningt:		
Your new name (in full) including title		
Your office		
Name of line manager		
Name of confidential contact/project manager		
Medical advisor's name		
Medical advisor's contact phone number		
4. Appointments and absences directly related to transitioning		

5. Telling your colleagues what is going on		
Tell people face-to-face individually or in groups		
Ask your manager or project manager to tell people for you.		
Use photos		
Pass on your news in other ways		
Carry out awareness sessions		
Answering questions		
Using the grapevine		
6. Getting ready for your first day in your new role		
When will it be?		
Do you need a change of role?		
Are you ready?		
Is your wardrobe ready?		
Are your colleagues ready?		
Can you get into work OK?		
The Media		
7. Changing everything into your new identity		
Your travel pass & photo		

Your work pass & photo		
Your Business Directory photo		
Your name (including title):		
do your colleagues know it?		
name badges		
telephone lists		
letter templates		
what else?:		
Your e-mail		
Your HR records		
Your pay records		
Your SAP username		
Your pension record		

*Medical appointments may be recurring at regular intervals. You will first want to identify which ones are likely to apply to you. Eventually you will get your first appointment. After that, you should be able to let your manager/project manager know:

- the likely frequency of appointments of this type
- whether you need official time off to attend them
- if you need official time off in order to travel to or from the appointment (which may itself have been arranged outside of work time)

CHANGES TO RECORDS RESULTING FROM TRANSITIONING

You will need to arrange for all your records to be changed. Some you need to do before or on your first day. Others can be done afterwards.

- Your travel pass & photo: do this before your first day, to avoid embarrassment on your journey in to work.
- Your work pass & photo: if you can't come in before your first official day at work to get your new pass, arrange for someone to escort you into your building on your first day and to organise your new pass as soon as possible
- Your Business Directory Photo. Email the [Business Directory mailbox](#) to ask them to update your entry when you have a new security pass photo taken.
- Your name: you will need to change your name on name badges, telephone lists, letter templates and all sorts of things in your office. You will also need to let your colleagues know by what name you are to be called. Your manager/project manager and awareness sessions should ensure that your colleagues are aware of the need to use your new name and the pronouns appropriate to your new role. But they might forget sometimes, particularly to start with. If you feel that continued mistakes amount to harassment you initiate proceedings under the Dignity at Work policy.
- Your e-mail: the ICT Helpdesk (xxxxxxx) will be able to set up a new e-mail address for you in your new name while retaining access to the old e-mail address for a temporary period until people stop sending mail to your old named account. Also see [MyIT](#).
- Your HR records³: Make sure the Corporate Shared Service Centre (CSSC) knows when you want to start using your new name. The CSSC will advise the HRIS Team and will update Snowdrop records as necessary. **Please note your payroll number and HR Self Service (previously U-Access) number will remain unchanged.**

³ Note re: HR Self Service (previously U-ACCESS) – Under 'My personal Details' and 'More'(in line at top of page) and 'Diversity Data' there is the question ' Is your gender identity the same as the gender you were assigned at birth' which can be completed along with other Diversity data

- Your SAP username – Contact the ERP Helpdesk to request a change of username to reflect any changes of name associated with gender transitioning
- Your pension record: you should write to the Corporate Shared Service Centre for the attention of the Pensions Manager if:

(i) you **do not** hold a Gender Recognition Certificate but you have assumed a different gender and/or are known by a different name. The Pension Administrators will update your records and correspond with you in your new name and title. Your pension entitlement will be calculated in the gender assigned to you at birth.

(ii) you **do** hold a Gender Recognition Certificate. The CSSC will arrange for your records to be updated to reflect your new legal gender. A change in gender may have an impact on different pension elements, for example Widow(er)'s Pension Scheme Contributions, Actuarial factors, buying Added Years (Added Pension) and Spouse's benefits. It is therefore very important that you contact the CSSC to eliminate the possibility of any problems when you finally leave the Welsh Government.

GLOSSARY OF TERMS

Assigned gender – this is the gender that a person is allocated at birth

Acquired gender – this is the gender that a person identifies with and is different to that which they were assigned at birth

Equality Act 2010 – legislation which outlaws discrimination on the basis of gender reassignment

Gender dysphoria - Gender dysphoria is a condition where a person experiences discomfort or distress because there is a mismatch between their assigned gender and gender identity.

Gender reassignment – the process by which an individual changes their perceived gender, with the intention that it is permanent. This may, or may not involve medical intervention or surgery.

Gender Identity - a person's internal perception and experience of their gender. The best evidence indicates that components of this appear to arise during late pregnancy or early years.

Gender Recognition Act 2004 – legislation which enables a transsexual person to legally alter their birth certificate so that they can enjoy specific rights and responsibilities appropriate to their acquired gender.

Gender Recognition Certificate – awarded to transsexual people by the Gender Recognition Panel to legally recognise the change to their gender.

Gender Recognition Panel – the body that assesses applications from transsexual people for legal recognition of the gender in which they now live.

Intersex - Intersex people have some aspect of their physical [sex](#) that is inconsistent with conventional ideas of male and female sex (such as in chromosomes, hormones, and/or internal or external sex organs), and is either present from birth or apparent later on, often at puberty

Non Binary - is an [umbrella term](#) covering any [gender identity](#) that doesn't fit within the [gender binary](#). The label may also be used by individuals wishing to identify as falling outside of the gender binary without being any more specific about the nature of their gender

Trans – an umbrella term that used by those who identify as transgender, transsexual or cross-dressers (transvestite).

Transgender –A transgender person is someone whose gender identity does not match their assigned gender. It may also include those who do not identify solely as one gender or another (“non-binary”). Some transgender people need to permanently change their perceived gender, and may change their name and identity as part of this. Some take cross gender hormone therapy and cosmetic treatments and possibly surgical procedures to alter their appearance and physical characteristics.

Transition – a more common term for gender reassignment.

Transsexual - This term is an older term used to describe (adjective) a person who intends to undergo, is undergoing or has in the past undergone gender reassignment (which may or may not involve hormone therapy or surgery). The term is no longer used widely, and can cause offense.

Transvestite - A person that cross-dresses and may or may not adopt the identity of the opposite gender through dress and behaviour. This is not a permanent change.