WAHT Supporting Colleagues Who are Transgender, Non-Binary or Gender Non-Conforming Policy

Appendix 2 – Support Plan for Transition

The following support plan can be used by the colleague and their manager to clarify the actions that will be taken over the course of the colleague's transition. The table can be modified to meet individual requirements and should be kept confidential unless both the colleague and manager agree to share this with other colleagues.

Colleague Name:	Manager Name:
What date does the colleague plan to start presenting in the workplace in the gender in which they identify?	
What will the colleague's name and title be following transition? What pronouns will be used?	
Are there any temporary or permanent changes / adjustments to the role, which should be considered to support the colleague? (considerations should include security aspects such as lone working and night working)	
Will time off be required? If so, how will this be managed? (flexible working options should be considered)	
When and how should colleagues be informed of the transition?	
Is there any guidance material, which the colleague wishes to share with managers and colleagues?	
If the colleague encounters any unacceptable behaviour towards them from colleagues, patients, visitors or others who should this be reported to? Think Behavioural Charter and FTSU	
Are there any actions not covered above that the colleague wishes to include?	

Is there an agreed date for when this checklist will be disposed of in line with the requirements of the Data Protection Act and GDPR?
Actions Agreed:
Date of Review Meeting:
Manager (sign and date)
Colleague (sign and date)

Who needs to be informed of your transition?

	Who will tell them?	When?	Date complete
Senior Manager			
Line Manager			
HR Representative			
Team Members			
Other colleagues			
Any others (specify)			

Changes to records – name and pronouns will be needed:

	Who will do this?	When?	Date completed
HR Records (including ESR, personal files, OH)			
Personal file and related data			
Name badge/ID Badge			
Email and Teams			
IT Systems			
Website (if applicable)			
Voicemail			
Union Membership			
Pension Scheme			
Any lease/hire schemes			
Certificates/Awards			
Professional Registration			
Other			

Records of meetings:

Date	Comments	Actions	Date of next meeting	Signatures