

**Supporting a staff member during transition - Checklist**

This list acts as a guide as to what should be considered but is not exhaustive. Not all of the items will be relevant to the individual who is transitioning.

<b>Process</b>	<b>What to take into consideration</b>	<b>Action plans / Agreements made</b>
<b>Timescales</b>	<b>What is the likely timescale for transition?</b>	
	Consider, for example, the dates or timescales for:	
	Name change	
	Medical procedures (if any are to be undergone)	

	Change of records	
<b>Name change</b>	<b>What cards and contact details need changing?</b>	
	College ID Card	
	Any other Imperial cards that need to be changed	
	College email	
	Web pages with the person's contact details	

<b>Record changes</b>	All personnel records held within HR and HR databases (ICIS)		
	All departmental records pertaining to the individual		
	<b>Financial records</b>		
		Payroll records	
		Banking details	
		Pensions, death in service and dependents' benefits	
	Training records/certificates gained in the course of employment at Imperial		
	Training attendance records		

	Online records, academic biographies	
	Online username and passwords	
	Committee meeting minutes and records	
	Committee and network email distribution lists	
	Welfare/disability/counselling records (if applicable)	
List other record changes required		

<b>Communication</b>	<b>Discuss with the individual how and whom they wish to inform of the change. This would include some or all of the groups listed below:</b>	
	Immediate team/s that they work closely with	
	Colleagues	
	Whole department	
	Support departments (Finance, HR, ICT, Pensions etc.)	
	Internal networks or project teams that the staff member is part of	
	Relevant students that the individual does or might work with	
	External contacts e.g. suppliers, clients	

	<b>How are people to be informed and by whom? Discuss the following:</b>	
	Does the individual wish to inform some or all the parties concerned?	
	Should the manager inform all or some of the parties concerned?	
	Should it be written or verbal communication? Agree the content and disclosure of such communication including whether the individual is happy for disclosure to the relevant parties or parts of relevant parties, departments etc.	
	<b>Platforms for communicating might need to be agreed:</b>	

	A meeting with the team or departments concerned	
	A meeting with just one relevant person in the team / department to be notified	
	Information in an internal email notification	
	Training on Trans Awareness which if agreed might include the staff member's input - personal experience and expectations	
	NB: The Equality, Diversity and Inclusion Centre will be able to advise on the training options available	
<b>Time off</b>	If the staff member is, or will be, undergoing surgery, do they know when this will be and the expected timescales of such procedures? (Please note that someone can transition without undergoing surgery.)	
	Will the staff member require time off for other treatments e.g. hormone therapy laser treatments etc.?	

	If the staff member requires time off for surgery and recovery, then meet to discuss what processes/support/adjustments are needed to ensure they remain in employment (either in their current job role or if they so wish, or through redeployment if they choose), or can return when they have recovered?		
	Options could include	current job	
		redeployment	
	Are there any areas for which the staff member is responsible for and would need to be covered in their absence e.g. projects training requirements, processes etc.?		
	Would any professional or training requirements be affected by their absence?		
<b>Discrimination</b>	Refer to the <a href="#">Trans Staff Policy</a> and the webpage about <a href="#">harassment support</a> for clear guidelines and processes to deal with direct or indirect discrimination, victimisation or harassment of a trans member of staff		



	Make the member of staff aware of these processes	
	Refer the staff member to the list of support contacts shown on Section 8 of the Trans Staff Policy for them to use should they have any concerns	
<b>Other points</b>	Discuss, agree and record below any additional support/actions needed.	