Appendix 1 - Checklist for staff

Checklist for supporting members of staff who are transitioning (Line Managers are advised to speak to their Human Resources Partner in progressing employee support, including a plan to support employee transition).

1. Main contact

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| Identify a single point of contact to support the individual and agree an action plan. |  |

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| What is the likely timetable for transition? e.g. Dates for name change |  |

1. Timetable

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| What identification needs to be changed and when? e.g., Staff ID card, HR database, payroll, pensions website |  |

1. Name

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| What documents and records need to be changed and when? e.g., University records, Department records, Contact relevant funding bodies, Professional bodies, Trade Union membership, Payroll (and banking details), Pension scheme. |  |
| Is the individual taking any extended time off? Is additional leave needed? |  |
| Is time off needed for medical appointments? |  |
| How can ongoing non-medical procedures be accommodated? e.g. Appointments for other issues and whether there is a need to accommodate flexible working?  |  |
| Is time off needed for any planned surgery? Staff may revert to the University’s Sickness Management Procedure and speak to their Line Manager/HR Partner where additional time off may be required.  |  |
| What arrangements have been made to ensure the individual is able to return to work? The Line Manager in discussion with the member of staff, may refer to Occupational Health on what other support may be required to support return to work. A risk assessment will be progressed accordingly. |  |
| Are any temporary adjustments needed to duties following surgery? e.g. avoiding heavy lifting. Individuals may experience fatigue or mood fluctuations. |  |
| Are any permanent changes to duties needed following medical treatment? |  |
| Are there any risks to the individual e.g. in relation to third parties or media intrusion, and how will they be handled? |  |
| Has workload during transition been discussed with the manager? Flexibility may need to be considered for example, if there are unexpected side effects or surgical complications.  |  |

1. Process

1. Facilities

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| Do any additional arrangements need to be made with regard to toilets or changing facilities? |  |

1. Support for the individual

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| Has the individual discussed their requirements with their GP, for example receiving gender identity counselling through a specialist? The Employee Assistance Programme (EAP) will be available and staff are encouraged to contact EAP as follows, freephone helpline 0800 980 6380 or online at www.ppconlineinfo.com. |  |

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| How will colleagues and students in the department be informed? Can a statement be agreed? This will be discussed with the individual and their views incorporated sensitively and accordingly. |  |
| How and when will external contacts be informed? This will be discussed with the individual in relation to stakeholder contacts. |  |
| Is there a need for communicating and training for those in the individual’s department to raise awareness? |  |

1. Communication