

Intermountain Healthcare is committed to diversity, health equity and equal employment opportunities. We believe that providing a work environment based on respect, trust and collaboration, where caregivers can bring their whole selves to work, creates an exceptional caregiver experience. These guidelines are intended to support transgender and gender non-binary caregivers in their workplace gender transition.

Contacts, policies and programs mentioned throughout this document are ***bolded and italicized*** and included in the Additional Resources section at the bottom of this guide with links for more information.

## Key Principles for Your Transition

You will have your own set of unique factors that will be best served by a customized transition-at-work plan. Create this plan in partnership with your leader and human resources business partner (HRBP). If you would like support in approaching your leader, contact the ***Office of Diversity, Equity and Inclusion***. The goal is for your leader and HRBP to understand your intentions, needs and concerns so they can support you in your workplace gender transition. Remember, as with all caregivers, you are protected under Intermountain's ***Non-Discrimination Harassment Retaliation Free Workplace Policy***.

## Initial Conversations

One of the first steps of your workplace transition is to inform key personnel who can assist you. Your first point of contact is your leader. Your leader will be encouraged to take steps to inform themselves about transgender or non-binary individuals and the transition process.

Together, you and your leader will create a transition communication plan that affirms your gender identity and outlines when, how and with whom you will share your gender identity. This is a personal process, and you will always have the main voice in developing your transition plan.

In addition to your leader, you may also find support from the following:

- Your ***HRBP***
- Intermountain's ***Employee Assistance Program***
- Intermountain's ***Office of Diversity, Equity and Inclusion*** and the ***LGBTQ+ Caregiver Resource Group***
- Intermountain's ***Equity Advocate***

## Name, Gender and Pronoun Changes

You can change your preferred name yourself in ***Workday***. Once your Workday profile is updated, contact AskHR and ***Information Systems*** to initiate changes to your email, phone directory, badge, etc. To encourage the use of your appropriate pronouns, you may choose to add your pronouns to your email signature and introduce yourself to others with your pronouns.

Use of correct gendering and naming practices is a crucial part of feeling affirmed and safe to bring your whole self to work. If you need additional support in helping your team or leader use the correct gender pronouns, identity and name, do not hesitate to reach out to the Office of Diversity, Equity and Inclusion.

Federal regulations require all internal and benefits-related systems, such as payroll records and insurance documents, to reflect your legal name. To begin the process of a legal name change and/or gender marker change, review your state's requirements

(<https://transequality.org>). Then, contact AskHR to submit documentation to begin the process to update your name throughout internal systems. Though legal name and gender marker changes may take months or years, Intermountain is committed to affirming your gender identity and correct name in everyday interactions.

### Medical Care and Leave of Absence

You may decide to have medical care to support your transition, including treatments such as hormone replacement therapy and/or gender affirmation surgery. Medical coverage is based on your insurance plan. Talk with your provider to determine relevant coverage and costs. If you are insured on Intermountain's employee plan, **SelectHealth Member Services** can connect you with a Transition Care Manager to discuss additional resources.

Time off for medical appointments and procedures will be granted on the same basis as for any other scheduled medical appointments and procedures. If an extended leave from work is required, contact AskHR to get in touch with a Leave of Absence specialist.

### Your Rights and Responsibilities

#### Privacy & Confidentiality

You are not required to disclose your medical information or gender history unnecessarily. Your sex and gender identity status are considered confidential and should only be disclosed on a need-to-know basis with your consent. Privacy breaches should be reported through the **Compliance Hotline** (1-800-442-4845). Refer to Intermountain's **Privacy Incident Reporting Policy** for more information.

#### Developing a Plan

There is no single formula for managing transitions in the workplace. Because of this, you are encouraged to develop a transition-at-work plan unique to you with the support of your leader. Specific steps of your transition and the timing may vary. You have the right to determine the amount of information that is shared with the rest of your team and how public you want to be about your transition.

Our workplace culture values process-oriented planning. We recommend creating an action plan in collaboration with your leader to ensure a smooth transition process. A plan also helps reduce uncertainties and provides a common road map for everyone. It is recommended that you and your leader work closely with the Office of Diversity, Equity and Inclusion on creating your transition plan. A DEI consultant or equity advocate can make themselves available to answer any questions you may have.

1. Get support from the people around you
  - a. Create a support team. Work with your leader, HRBP and other supportive coworkers to develop a transition plan for you and your work area.
2. Develop a stakeholders list
  - a. List all people, internal and external, you need to engage at some point during your transition and determine when to inform them.
  - b. Work with your leader to decide when patients, members or other customers need to be informed.
3. Create a milestone timeline
  - a. Determine how you will inform your team of your transition (e.g. letter, face-to-face meeting, individual discussions, etc.).
  - b. Be aware of how long internal functions take (e.g. name changes, directories, etc.).
  - c. Once you have updated your legal name, make necessary changes to professional licenses.

### **Appearance Standards**

You have the right to openly be who you are. You will be supported in your gender expression without fear of consequence. Your leader has the responsibility to review your professional attire without personal bias. For more information on Intermountain's appearance standards, review the *Professional Appearance Policy*.

### **Restroom and Locker Room Access**

You are permitted to use the restroom and locker room facilities that correspond with your gender identity. Determine the most appropriate option for yourself. Conversations with coworkers around concerns about restroom and locker room access are usually best handled by your HRBP. They have the experience to deal with the matter appropriately.

### **Addressing Coworkers and Customers**

A diverse workplace means that caregivers must be able to work with a variety of people. It is not required that others accept your gender identity and expression, but it is expected that all caregivers treat one another with mutual respect. If you have any concerns, contact the Office of Diversity, Equity and Inclusion.

### **Communicating with patients and customers**

Communicating with patients/customers may require sensitive conversations. Work with your leader beforehand to clarify how certain situations or questions should be managed and communicate the support you need in these interactions.

### **Communicating with coworkers**

An appropriately timed meeting is usually the best setting for informing coworkers of your workplace gender transition. Prior to the meeting, discuss with your leader what you are comfortable sharing and in what format (e.g. reading a letter, team meeting, individual discussions, etc.).

Respectful communication about your transition is expected of everyone. Your team members will be encouraged to examine and process their reactions with the appropriate resources. Your leader and HRBP can be valuable resources to draw out feelings and avoid potential situations before they become a problem. You are not required to participate in these processes. The expectation of inclusion in the workplace does not rest solely on you.

Adjusting to a gender transition can take some people time, and they may make mistakes with your name and pronouns. You have had more time to get comfortable with your identity. Your coworkers will need some time to adjust as well. Talk with your leader and coworkers about how they can best affirm you in these moments. Consistent and intentional misgendering and deadnaming is not acceptable. You will always be supported in escalating a concern. Work with your leader, HRBP and the Office of Diversity, Equity and Inclusion.

## Additional Resources

### Caregiver Resources

- [Office of Diversity, Equity and Inclusion](#)
  - Contact [WeAreInclusive@imail.org](mailto:WeAreInclusive@imail.org)
    - Intermountain Equity Advocate
    - [LGBTQ+ Caregiver Resource Group](#)
- HRBP – Contact [AskHR](#)
- [Workday](#)
  - [How-To Videos](#): Updating Demographics in Workday
- [Employee Assistance Program](#)
- [Information Systems](#)
- [Recognize and Respond Guidelines](#)

### Health Plan Support

- [SelectHealth Member Services](#)
  - Transition Care Managers

### [Intermountain Policies and Resources](#)

- [Compliance](#) Hotline (1-800- 442-4845)
- Non-Discrimination Harassment Retaliation Free Workplace Policy
- Privacy Incident Reporting Policy
- Professional Appearance Policy
- Cultural Guide
- [LGBTQ Inclusive Communication Techniques](#)

### National Center for Transgender Equality

The National Center for Transgender Equality advocates to change policies and society to increase understanding and acceptance of transgender people. In the nation's capital and throughout the country, NCTE works to replace disrespect, discrimination, and violence with empathy, opportunity, and justice. The NCTE website has several resources for transgender people and trans allies. <https://transequality.org>

### HRC

The Human Rights Campaign (HRC) is the largest LGBT lobbying group and political action committee in the United States. The HRC mission statement is: "HRC envisions an America where gay, lesbian, bisexual and transgender people are ensured equality and embraced as full members of the American family at home, at work and in every community." [www.HRC.org/workplace/transgender](http://www.HRC.org/workplace/transgender)

### GLAAD

As a dynamic media force, the Gay and Lesbian Alliance Against Defamation (GLAAD) tackles tough issues to shape the narrative and provoke dialogue that leads to cultural change. GLAAD protects all that has been accomplished and creates a world where everyone can live the life they love. <https://www.glaad.org/transgender/resources>

### PFLAG

Parents, Families, and Friends of Lesbians and Gays (PFLAG) is a group of family members and friends of Lesbian, Gay, Bisexual, and Transgender (LGBT) people. PFLAG promotes the health and well-being of Gay, Lesbian, Bisexual, and Transgender persons, their families and friends through support to cope with an adverse society, education to enlighten an ill-informed public, and advocacy to end discrimination and to secure equal civil rights. [www.PFLAG.org](http://www.PFLAG.org)

### U.S. Equal Employment Opportunity Commission

Sexual orientation and gender identity discrimination laws, rights and federal regulations. <https://www.eeoc.gov/sexual-orientation-and-gender-identity-sogi-discrimination>

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Contacts, policies and programs mentioned throughout this document are ***bolded and italicized*** and included in the Additional Resources section at the bottom of this guide with links for more information.

### About Gender Transition

Transgender is a broad umbrella term for people whose gender identity, expression or behavior is different from those typically associated with their sex assigned at birth. The process of an individual publicly changing their gender presentation in society is known as transitioning. There is no single way to transition. An individual who chooses to transition may take all or some of the steps available to them.

### Key Principles for Supporting a Caregiver's Transition

If someone who reports to you informs you of their desire to transition, or if an individual in your workplace is currently transitioning, your support is critical. Keep these things in mind:

- The caregiver may be worried about their workplace transition. Based on past experiences of bias, it may be quite stressful and frightening to make themselves vulnerable to a person upon whom their job depends. Make it clear that your conversation will be held in confidence. Listen carefully to what the individual is telling you about their needs, concerns and how they'd like to be treated. Provide information on the ***LGBTQ+ Caregiver Resource Group, Employee Assistance Program (EAP)*** and other resources for the caregiver to seek additional support during the transition.
- Creating a transition plan can help smooth the process. Your caregiver should have the main voice in the process, including deciding when and how they want to come out. Ask their opinion on matters covered in subsequent sections of this guide.
- Conflicts are often based on lack of information. The resources at the end of this guide can help provide education. Your caregiver may also be willing to educate others but is not required to.

### Guidelines for Leaders

#### Initial Conversations

When a caregiver contacts you to explain they are planning to transition and want to start presenting in their new identity, assure them that:

- You will work with them to help make their transition as smooth as possible.
- This information will be shared at a time approved by your caregiver and in a respectful manner.
- Your caregiver will have the main voice in when they will begin to work and present in their affirmed gender.

### The Role of Your HR Business Partner

Ask your caregiver how you can involve your HRBP for assistance. In addition to ensuring these best practices are followed, HRBPs will support you and your caregiver throughout the entire transitioning process. Schedule regular check-ins with your caregiver and HRBP to:

- Ensure individual and team meetings are scheduled in accordance with your caregiver's transition-at-work plan and the proper external support is being leveraged.
- Keep a pulse on the department to ensure problems are being addressed as they arise.
- Check in over the long-term, not just during the initial transition process. Some issues may not surface until some time has passed and the initial focus on transition is over.

It is also recommended that you seek the support of the Office of Diversity, Equity and Inclusion.

### Privacy & Confidentiality

Confidentiality is key in the early stages of transition planning. Transgender caregivers have the right to be who they are without unnecessary disclosure of medical information or gender history. Some caregivers may prefer that very few people know they are about to transition, while others are committed to educating others about transitioning and are eager to answer questions. Assure your caregiver that their privacy and preferences will be respected.

The transition status of an individual is considered confidential and should only be disclosed on a need-to-know basis with the consent of the individual. Privacy breaches should be reported through the **Compliance Hotline** (1-800-442-4845). Refer to Intermountain's **Privacy Incident Reporting Policy** for more information.

### Informing Team Members

Work with your caregiver on how and when to inform team members to ensure a smooth transition process. Your caregiver may choose a team meeting, one-on-one discussions, or a letter or email to be sent out. Your caregiver may personally tell a few coworkers with whom they are close before everyone else is told. Encourage those coworkers to keep the information confidential until your caregiver is ready to share with others.

At the information meeting:

- Tell team members at the meeting that one of their coworkers will be transitioning and who that person is. Your caregiver may or may not wish to be present.
- Reinforce Intermountain's commitment to diversity and supporting the caregiver as they transition.
- Give team members a chance to ask questions.
- Recognize that people's feelings about sex and gender identity can raise strong emotions and discomfort. Reinforce that all team members are expected to engage each other in a mutually respectful manner. Encourage team members to examine their feelings and speak to HRBPs, EAP or other subject matter experts to help process feelings and avoid potential conflicts.

### Name, Gender and Pronouns ([Why pronouns matter](#))

Caregivers can change their preferred name themselves in **Workday**. Once the Workday profile is updated, **AskHR** and **Information Systems** can initiate changes to email, phone directory, badge, etc. To support your caregiver, use their correct name and pronouns. You may also choose to add your pronouns to your email signature and introduce yourself to others with your pronouns to lead by example among your team.

Use of correct gendering and naming practices is a crucial part of your caregiver feeling affirmed and safe to bring their whole self to work. If you need additional support in helping your team use the correct gender pronouns, identity and name, reach out to the Office of Diversity, Equity and Inclusion.

Though legal name and gender marker changes may take months or years, Intermountain is committed to affirming gender identity and correct name in everyday interactions. Until a legal name and gender marker change come through, use the affirmed name and gender marker on all documentation including communications, access badge, name plate, etc. when your caregiver is ready.

It is unacceptable to refer to anyone, including transgender or gender non-binary people, by the wrong name or gender. This includes using the wrong pronoun or name once someone has made clear what these are. Adjusting takes time for people and accidents will happen. However, continued and prolonged use of the incorrect name and/or pronouns can be considered harassment and will be addressed under Intermountain's ***Non-Discrimination Harassment Retaliation Free Workplace Policy***. Respectful communication about a caregiver's transition is expected of everyone.

### **Working with Patients and Customers**

Communicating with patients, members and other consumers as a transgender caregiver may be difficult. Meet with your caregiver to discuss how best to support them during these interactions and create a plan for how certain situations or questions should be managed.

### **Appearance Standards**

Caregivers should be supported in their gender expression without fear of consequence. You have the responsibility to review your caregivers' professional attire without personal bias. For more information on Intermountain's appearance standards, review the ***Professional Appearance Policy***.

### **Restroom and Locker Room Access**

All caregivers have the right to use restroom facilities and locker rooms that correspond with their gender identity. Intermountain has the responsibility to provide transgender caregivers with the same level of facility access available to non-transgender caregivers.

Team members who have personal concerns should be invited to have an honest discussion with an appropriate leader or HRBP. Team members who remain uncomfortable sharing a restroom with a transgender caregiver should be encouraged to travel to a different floor or work area to use the facilities.

### **Addressing Concerns of Team Members and Customers**

A lack of knowledge about transgender issues has the potential to create misunderstanding and tension in the workplace. The likelihood of negative reactions can be reduced by providing adequate training, treating all caregivers fairly and establishing a culture that celebrates differences. It is not required that others accept or understand an individual's gender identity, but everyone is required to treat each other with mutual respect (see Non-Discrimination Harassment Retaliation Free Workplace Policy). Ensure individuals can express their concerns, ask questions and learn about transitioning in the workplace with you and your HRBP.

### **Monitoring for Signs of Resentment & Hostility**

Some team members may express hostility or resentment toward your transitioning caregiver by refusing to use their preferred name and correct pronouns, verbally harassing the caregiver or refusing to work with them. Such behavior often goes unreported out of fear of increased harassment. Intermountain Healthcare complies with all applicable federal civil rights laws and does not discriminate against any individual, including on the basis of sex or gender identity or expression.

Leaders must be proactive in monitoring behavior toward your caregiver and provide a way for the caregiver to report harassment confidentially. Any harassment should be dealt with immediately to send a clear message that this behavior is unacceptable. Contact your HRBP or the Compliance Hotline (1-800-442-4845) to help your caregiver escalate concerns.

Team members who raise concerns about a transitioning coworker should be coached to differentiate personal beliefs from appropriate workplace behaviors where necessary. If caregivers still express concern regarding a transitioning coworker after reviewing Intermountain's policies, or if they are curious about the caregiver who has transitioned, leaders should meet with those team members individually.

### **Affirming Your Caregiver**

Adjusting to a gender transition can take some time, and people may make mistakes with a transitioning caregiver's name and pronouns. Talk with your caregiver about the best ways to affirm them in these moments. Always listen to your caregiver's needs and concerns. Your HRBP and the Office of Diversity, Equity and Inclusion are always available to you for additional support.





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