

# Gender Identity and Gender Expression Workplace Review Form

## Introduction:

The attached checklist is intended to serve as a review of company policies, practices and procedures that affirm transgender inclusion in the workplace.

The review content is derived from the Human Rights Campaign Foundation's Corporate Equality Index standards and the HRC Foundation's recommended Gender Transition Guidelines, and from additional supporting materials such as the WPATH Standards of Care.

## Process:

- To allow for the best possible evaluation, reviewers should strive to be thorough in completing the form.
- Input from the Human Resources department may be necessary.
- Wherever possible, documentation and specific examples should be attached to allow for review.

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## **Equal Employment Opportunity**

Does the Equal Employment Opportunity statement include specific language for:

- "gender identity"
- "gender identity and/or expression"
- [Copy of EEO statement attached](#)

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## **Employment Benefits**

### Health Insurance Coverage:

*Note: Deciphering the ins & outs of transgender-inclusive coverage can be difficult. The team at HRC's Workplace Equality Program can help. Contact us at [cei@hrc.org](mailto:cei@hrc.org) for a review of your plan documents including recommendations for best practices.*

For all benefits-eligible U.S. employees, does at least one health insurance plan meet the following criteria:

- Benefits are available firm-wide to all U.S. based eligible employees?

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- Does the insurance contract explicitly affirm transgender services?
- Are blanket exclusions for transgender coverage removed?
- Is the insurance contract and/or the policy documentation based on the WPATH Standards of Care? If so, what WPATH standards are referenced?
  - WPATH Standards of Care v.6 2001 and WPATH Clarification of Medical Necessity 2008 (most common)
  - WPATH Standards of Care v.7 2012 (most current)
- Is coverage available for non-U.S.-based employees?
  - Yes  No
  - [Copy of the non-U.S. coverage description attached](#)

### Documentation of Coverage:

#### Plan Accessibility:

- Is the plan documentation readily available to employees? Where do they find it?  
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- Does the plan documentation clearly communicate inclusive insurance options to employees and their eligible dependents?
- Does the plan language ensure “adequacy of network” or access to specialists for transition-related care (including provisions for travel or other expense reimbursements)?
- Does the insurance company provide “concierge” or specially trained customer service reps to handle transgender healthcare inquiries?

Indicate whether the following benefits are extended to transgender individuals:

- Short-term medical leave
- Mental health benefits
- Pharmaceutical coverage (e.g., for hormone replacement therapies)
- Coverage for medical visits or laboratory services
- Coverage for *reconstructive* surgical procedures related to sex reassignment – limited, and usually includes the following:
  - Female-to-male:
    - Bilateral Mastectomy (without nipple reconstruction)
    - Hysterectomy and bilateral salpingo-oophorectomy
    - Vaginectomy (including colpectomy, metoidioplasty with initial phalloplasty, urethroplasty, urethromeatoplasty)

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- Male-to-female:
  - Orchiectomy
  - Vaginoplasty (including colovaginoplasty, penectomy, labiaplasty, clitoroplasty, vulvoplasty, penile skin inversion, repair of introitus, construction of vagina with graft, coloproctostomy)
  - Breast augmentation

Increasingly companies are moving beyond sexual reassignment surgeries only to offer enhanced benefits programs that meet the full needs of transgender people as defined under the WPATH standards. Please indicate whether your plan covers the following:

- Tracheal shave
- Facial feminization surgeries
- Body contouring and/or liposuction
- Laser hair removal or electrolysis
- Nipple reconstruction or tattooing
- Travel funds for surgical care
- Other (list) \_\_\_\_\_

Any additional medical and surgical coverage beyond above?

If so, provide or attach a list of additional services/procedures covered:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- Fully inclusive coverage defined as procedures deemed medically necessary as established between the transgender person and their health-care provider
  - [attach documentation](#)
- Coverage of routine, chronic or urgent non-transition services based on the person's sex or gender (for example, prostate exams for women with a transgender history and pelvic/gynecological exams for men with a transgender history must be covered).

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What are the dollar maximums on this area of coverage?

- No cap (Recommended best practice)
- < \$75,000
- = \$75,000
- > \$75,000

Copies attached:

- Excerpt of Summary Plan Description (SPD) – or – complete Summary of Material Modifications (SMM) indicating coverage is available
- Any medical policy, clinical guidelines or policy bulletins that indicate the range of services covered and the process of determining coverage eligibility

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**Organizational Transgender Competency**

Competency training, resources and accountability measures:

Application & Interview Stage:

- Application includes ability to note preferred vs. legal name
- Background check forms require legal name
- Background check forms require full history of legal names
- Interviewer has a process to know or allow for preferred name. How is this done?

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Include other relevant details:

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On-boarding:

- On-boarding forms include opportunities to note preferred name vs. legal name wherever possible. Examples of documents to review & pull together:
  - email and system logins
  - employee directory and nameplate designation forms
  - business card order form
- Where legal name is required it is due to a legal constraint such as payroll, insurance forms, licensing, etc.

Cultural competency:

- New hire training clearly states that the nondiscrimination policy includes gender identity and/or expression
- New hire training provides a definition and a scenario illustrating nondiscrimination policy for includes gender identity and/or expression

Describe when this training takes place. Provide examples of content here or as an attachment:

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Managerial Competency:

- Supervisors and managers undergo training that includes gender identity and expression as a discreet topic (may be part of a broader training).
- Supervisor and manager training includes a definition and a scenario illustrating non-discrimination policy for gender identity and expression.

Describe when this training takes place. Provide examples of content here or as an attachment:

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Professional Development and Leadership:

- Gender identity and expression is included in professional development and other leadership training that includes elements of diversity and/or cultural competency.

Describe when this training takes place. Provide examples of content here or as an attachment:

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Support and Communication:

- The company has an employee resource group (or affinity group).
- The company has a diversity council.
- Senior management/executive performance measures include LGBTQ diversity metrics.
- The company performs anonymous employee engagement or climate surveys that allow employees the option to identify as a member of the LGBTQ community.
  - Annually       Biannually
- Company data collection forms that include employee race, ethnicity, gender, military and disability status — typically recorded as part of employee records — include optional questions on sexual orientation and gender identity.

- Copy of application form attached
- Copy of background check authorization form attached
- Copy of survey language attached
- Copy of company data collection form(s) attached

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### Policy in Action: Gender Transition Guidelines

#### Documentation and Communication of Guidelines

- The company has documented “Gender Transition Guidelines.”
- Gender transition guidelines are published: (check all that apply)

#### *Company Intranet:*

- HR resources section
- LGBTQ employee group section
- Link to guidelines from other applicable sections such as
  - Employment non-discrimination/ equal employment opportunity policy
  - Dress code
  - Restroom, locker room policies
- Company intranet search terms: employees looking for information may use a variety of terms to find company gender transition guidelines and other policies related to transgender inclusion such as: transition guidelines, gender identity, gender expression, transgender, transsexual, cross dress, gender reassignment, sex reassignment, sex change\*, SRS, GRS, transgendered\* (\*these are not preferred terminology, but are intended to capture potential searches). Ensure policies are associated with a robust list of search terms
- Company-written employee handbook
- Other: \_\_\_\_\_

Do you have a company EAP and/or a Human Resources hotline?

- Yes  No  Both

- EAP representatives and/or HR hotline have a copy of the guidelines.
- EAP representatives and/or HR hotline staff receive cultural competency training in gender identity and expression and possess a thorough understanding of the guidelines and relevant policies.

## Evaluate Your Workplace: Take the Gender Review

### Guideline Specifics:

Gender transition guidelines outline the critical components to successful on-the-job transition experiences for the employee, the co-workers and the company. Gender transition guidelines should, at a minimum, address the following:

- Guidelines specify people or roles charged with helping a transitioning employee manage their workplace transition.
- Outlines what a transitioning employee can expect from management.
- Communicate management's expectations for staff, transitioning employees and any existing LGBTQ employee group in facilitating a successful workplace transition.
- Outlines the general procedures for implementing transition-related workplace changes, such as adjusting personnel and administrative records.
- Provides a plan for how a communication strategy for co-workers and clients will be developed.
- Includes educational material regarding transgender people, including a glossary of relevant terms.
- Answers frequently asked questions about dress codes and restroom use.

Gender transition guidelines are generally fairly robust documents addressing a wide variety of issues relevant to transgender inclusion. As such, it is best that the actual plan language be attached for a complete review by an outside party.

- [Copy of gender transition guidelines attached](#)