

## BEFORE

- Confirm non-discrimination policy names gender identity & expression
- Audit benefits for transition-related coverage; remove exclusions
- Build a chosen-name process across all systems
- Train managers on disclosure response & confidentiality
- Confirm legal obligations with counsel (varies by location)
- Identify support resources: EAP, ERG, escalation path

## WHEN TOLD

- Thank them; ask name, pronouns, timeline & confidentiality boundaries
- Never announce on their behalf without explicit approval
- Submit name/system update requests the same day
- Plan the team announcement together, or skip it, per their wishes
- Update badge, facilities access, payroll & systems promptly
- Address team questions or discomfort directly and promptly

## AFTER

- 30- and 90-day check-ins
- Close out every remaining record & system update
- Take any harassment report seriously; document and act promptly
- Ask for process feedback and apply it
- Sustain inclusive culture & training year-round, not just in the moment

*A free resource from [realyouatwork.com](https://realyouatwork.com) · See the full Employer's Roadmap for details on every item.*