



Government
of Canada

Gouvernement
du Canada

Canada

THE 50 – 30 CHALLENGE

YOUR DIVERSITY ADVANTAGE



Name & Pronoun Change Procedure Checklist

A checklist to track employee name/pronoun change procedure. Modify this document to suit your organization's needs.

	Procedure	Done
1.	Determine if name is legally changed or informally change to determine next steps.	<input type="checkbox"/>
2.	If legal: update payroll and tax information. If informal: notify employee that their legal name will still be visible on payroll and tax information.	<input type="checkbox"/>
3.	Inform employee of any next steps they must undertake.	<input type="checkbox"/>
4.	Work with employee to create a plan of notifying others, including determining who is responsible notification and setting deadlines for completion of action.*	<input type="checkbox"/>
5.	Change employee name and/or pronouns in the necessary systems and locations, noting when each item is complete and informing employee when all changes are made.	<input type="checkbox"/>
6.	Check in with employee post-change to follow up and ensure they feel supported.	<input type="checkbox"/>
7.	If employee requests an accommodation or support plan for transitioning, begin these steps according to organization's procedures.	

If employee would like an all-staff email announcement from employer/manager RE: their name and/or pronouns change, leadership will contact employee before sending for approval of wording and information shared. Email announcement typically follow this format, but may be amended according to employee wishes:

“Dear Staff, this is an update that [employee’s former name] has changed their name to [insert name]. Their pronouns are [insert pronouns] Please use this name and these pronouns going forward. Be sure to update their contact information with their new email address [insert email]. Thank you.”

See resource from the University of South West Wales for a [comprehensive template of announcements](#), including a sample notification of a name change from employee to management.