

# Presidential Policy on Gender Recognition and Lived Name



# Checklist for Departments

- Has everyone completed the online training?
- Has there been communication to all students and employees about ability to use lived names and gender/risk outside of UC/state/country?
- Integration of systems for use of lived names?
- Does everyone know how to report discrimination and non-compliance with the policy?

# Policy Overview

- This new presidential policy ensures all individuals are identified by their accurate gender identity and lived or preferred name on university-issued documents and in UC's information systems by providing guidance on the collecting and reporting of gender identity lived name, and sexual orientation.
- Effective November 6, 2020, the systemwide policy must be fully implemented by December 31, 2023.
- The policy applies to all University students, employees, alumni, and affiliates.
- Full Policy & Appendix:  
<https://policy.ucop.edu/doc/2700693/GRLN>

# Policy Overview

- Gender Recognition
  - Minimum three equally recognized gender options — woman, man and nonbinary
  - Ability to easily change and update for students, employees, alumni and affiliates
  - The University is no longer asking for “sex assigned at birth” or “sex as listed on birth certificate”
  - The policy addresses how to report gender data to health insurers and the federal government and other places where only a female/male binary is used

# Policy Overview

- Lived name
  - Lived names can be first name, middle name and/or last name or surname
  - Lived names used whenever possible in the course of university business and education
  - Legal name must be kept confidential and must not be published on documents or displayed in IT Resource systems, unless it is the same as lived name
  - Only use legal name where legally required (generally this is when also using social security number)
  - Ability to easily change and update for students, employees, alumni and affiliates

# Policy Overview

- The policy permits the use of lived student names on eligible academic documents which include transcripts, diplomas and dissertation title pages
- Sexual orientation
  - Expands sexual orientation options to include asexual, requires fill in the blank options
- Pronouns
  - The policy guidance states locations may choose to add pronouns fields in information systems
  - Encourages their use in conjunction with all other updates

# Implementation Considerations

- Provide training to employees in the careful use/disclosure of legal names
- Modify all students, employees, alumni and affiliate IT systems, including downstream systems, to accept lived name and the gender identity data fields, include expanded sexual orientation options, and encourage pronouns

# Implementation Considerations

- Safeguarding, protecting and managing hardcopies and digital forms which collect gender, sexual orientation, legal and lived name data
- Training staff who have access to gender, sexual orientation and legal name data about their role as data stewards and UC privacy policies
- Creating a culture inclusive of all diverse gender identities and sexual orientations, and the value of gender recognition, lived names and pronouns
- Reporting issues to the Chief Compliance Office to respond to noncompliance and harassment





**Questions?**