

# TRANS\* INCLUSION

## Takes Different Forms



**Most organizations have a variety of forms for collecting information from people. These forms range from client intake forms to conference registration forms to human resource forms.**

A person's first interaction with an organization may be through a form, in which case that form will provide a first impression of your organization.

Trans\*<sup>1</sup> people may feel excluded from organizations that exclude them from their forms. Forms that limit gender choices to male and female are not inclusive. Everybody needs to be able to recognize themselves in the answer choices.

The purpose of this document is to provide a tool to help you modify your forms so that:

1. People who identify as trans\* are – and feel – included;
2. The information you collect about gender is accurate; and,
3. The information you collect is more useful, contributing to a better understanding of trans\* people both individually and collectively.

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<sup>1</sup> Throughout this document, we use the word trans\* (with the asterisk) as an umbrella term that includes transgender, transsexual, genderqueer, intersex and otherwise gender non-conforming people. However, not every individual who falls into one or more of these categories will necessarily identify with the term trans\*.

## GENERAL GUIDELINES

1. First, consider whether you need to collect information about people's gender or sex. Often, we ask this question on forms simply because we've always asked it. If gender is not relevant to the purposes of a form, omit the question altogether. If you do have a reason to ask, then provide ways to answer that go beyond the binary of male/female.
2. Do not simply tack on "other" as a catch-all category for everybody who doesn't identify as male or female; nobody likes to be othered. ('Other' is, however, useful when used in conjunction with a more inclusive set of choices, as it allows people to further clarify their gender identity.)
3. Consider using an open-ended question, such as:  
*What is your gender?* \_\_\_\_\_.
4. If you don't want to use an open-ended question, but don't need to know who is trans\* (for example, if you just want to ensure your forms are inclusive), use one of the basic gender questions on page 2.
5. If you need to know who is trans\*, use the 2-step Question on page 2. (For example, if you are providing gender-based services, or if you need to track and report the number of clients served by gender.)
6. Protect any information about trans\* status as confidential.
7. Make sure all staff (receptionist, intake workers, etc.) are familiar with all terminology on your forms and can answer questions.



The following are examples of a variety of trans\*-inclusive form questions. Depending on their purpose, some ask for more detail and personal information than others.

## BASIC QUESTION ABOUT SEX OR GENDER

Here are three options for a simple form where you just need to capture basic gender information and want to ensure that nobody is excluded from the answer choices. This question would replace your existing sex or gender question.

### Option A

**Gender:** \_\_\_\_\_

### Option B

**Gender Identity (check all that apply):**

- Man     Woman
- I identify as \_\_\_\_\_

### Option C

**Gender Identity (Check all that apply):**

- Man     Woman     Trans\*
- Other (please specify) \_\_\_\_\_

Note: Many people have more than one gender identity, (e.g. female and trans\*) so always allow multiple selections. For online forms, use checkboxes so people can select all the responses that apply to them. (Radio buttons force people to choose only one item in each group.)

## 2-STEP QUESTION TO IDENTIFY TRANS\* PEOPLE

Designing an intake form that will identify transgender people can be challenging. Using gender alone is not enough because some people in this community do not self-identify as transgender. **The 2-step data collection method of asking for sex assigned at birth and current gender identity** increases the likelihood that all trans\* people will be accurately identified. Both questions are asked.

### 1. What is your sex or current gender? (check all that apply)

- Male
- Female
- Trans\* male / Trans\* man
- Trans\* female / Trans\* woman
- Genderqueer
- Additional Category (please specify) \_\_\_\_\_
- Decline to State

### 2. What sex were you assigned at birth?

- Male
- Female
- Decline to State

This 2-step question is recommended by The Centre for Excellence for Transgender HIV Prevention because it allows you to validate a person's current gender identity while also understanding something about their history. For the complete rationale for the wording of this question, please see [Recommendations for Inclusive Data Collection of Trans People in HIV Prevention, Care & Services](#).<sup>2</sup>

<sup>2</sup> <http://transhealth.ucsf.edu/tcoe?page=lib-data-collection>

## MORE DETAILED QUESTION ABOUT SEX/GENDER

This is the gender identity question on a community health centre's patient registration form:

### **Gender Identity (check all that apply):**

- Man
- Woman
- Transsexual
- Transgender
- Two-Spirit
- Intersex
- Unsure
- Genderqueer
- Other (please specify) \_\_\_\_\_

## QUESTION ABOUT NAME

This is applicable for intake forms in settings such as hospitals, health centers, departments of transportation, etc., where the names on people's official identification documents may not match the names they normally use.

Name: \_\_\_\_\_  
                    First                    Last                    Middle Initial

Preferred Name/Nickname (optional)  
\_\_\_\_\_

Note: If you're going to ask someone for their preferred name, it stands to reason that you would also call them by it, both in conversation and when calling out their name in a waiting room.

## QUESTION ABOUT PRONOUNS

There may be occasions where collecting pronoun information on a form could be useful. For example, if you're going to be introducing a speaker at a conference you will likely be using pronouns, so you might want to include this question on the speaker registration form.

### **What pronouns do you use?**

- Masculine (he/him)
- Feminine (she/her)
- Gender-neutral  
(Please specify) \_\_\_\_\_

## QUESTION ABOUT TITLE

We recommend that you do not ask for titles on your forms (i.e. Mr./Ms./Mrs./Miss/Dr./Rev./etc.). Titles cause difficulties for trans\* people that outweigh the minimal usefulness they may provide to organizations. Letters can be addressed to individuals using their full name (e.g. Dear John Doe), and full names (without titles) can be called out in waiting rooms. Individuals can then be asked how they want to be addressed (eg, by their first name, Ms., Mr., etc.).

Alternatively, some organizations add the title Mx (pronounced Mux) to their list of title options. The x is intended as a gender-neutral wild card. Mx is not in widespread use as a gender-neutral title.

## QUESTION ABOUT SEXUAL ORIENTATION

The Sherbourne Health Centre in Toronto asks about sexual orientation in the following way. (Note that they preface the form by saying that the questionnaire is optional, and if you are uncomfortable with any of the questions, you do not need to answer them.)

### **Sexual orientation:**

- Heterosexual
- Gay
- Lesbian
- Bisexual
- Two-spirit
- Queer
- Pansexual
- Prefer not to answer
- Do not know
- Other \_\_\_\_\_
- Not applicable

Note: Transgender is not on this list, because it is not a sexual orientation; it is a gender identity. It is important to avoid making assumptions about sexual orientation and sexual behavior based on gender identity.



Labels such as gay or straight may mean different things to different trans\* people, or to the same trans\* person at different periods in their life. It may be more useful to ask trans\* people about sexual behaviours rather than about sexual orientation.

## QUESTIONS ABOUT SEXUAL BEHAVIOURS

If you need to ask about sexual behaviours on your form, here are some ways to do it.

### 1. Are you currently sexually active?

- Yes       No

### 2. With whom are you sexually active? (Please check all that apply)

- Women     Men     Transgender People  
 Transsexual People     No-one

### 3. Is/are your current sexual partner(s): (Please check all that apply)

- Female     Male     Transsexual  
 Transgender     Two-spirit  
 I have no current partner(s)

### 4. Were your previous sexual partner(s): (Please check all that apply)

- Female     Male     Transsexual  
 Transgender     Two-spirit  
 I have no previous partner(s)

Note: Again, if you're designing an online form, use checkboxes so people can select all the responses that apply to them. (Radio buttons force people to choose only one item in each group.)

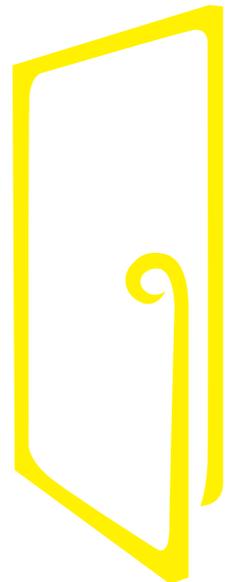
## REPORTING REQUIREMENTS FOR ASOs

AIDS service organizations (ASOs) are required to report basic aggregate information about clients to their funders, including information about gender. This information may differ from province to province. In Ontario, for example, the O-Chart reporting tool asks each ASO how many men, women, trans\* men and trans\* women they provide various services to.

- We recommend that ASOs use the 2-step gender question for determining gender (see page 2).
- We also recommend that people be permitted to answer these questions themselves, rather than having an intake worker or other staff presume their gender.
- Where applicable, we encourage ASOs to talk to their funders about adjusting reporting language and questions to include people of all genders. Not all trans\* people identify as trans\* men or trans\* women; there needs to be a category for those who identify as non-binary or genderqueer.

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