How to Run a Trans ID Clinic

A practical guide to operating a legal name and gender marker change clinic for Two Spirit, trans, nonbinary, and gender nonconforming (2STNBGN) people

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Objective

This how-to-guide provides guidance for anyone looking to launch a Trans ID Clinic to assist Two Spirit, Trans, Nonbinary, and Gender Nonconforming (2STNBGN) people in updating their legal name and gender markers.

Context and Project Partners

In 2021, community partners came together to run a Trans ID Clinic in Saskatchewan. Partners included CLASSIC Legal Services, the Trans Navigator Project, and the Social Innovation Lab, and drew on expertise from Trans Sask Support Services. Though we refer directly to a Saskatchewan context, we provide guidance in hopes that it can be of service to other organizations and initiatives.

About CLASSIC classiclaw.ca

CLASSIC provides free legal support for people who experience poverty and injustice.

About the Trans Navigator Project research-groups.usask.ca/transnavigator/index.php

The TRANS Health Navigators work to identify gaps in the current health care system and support 2STNBGN people as they navigate systems and processes.

About Trans Sask transsask.ca

Trans Sask is a province wide non-profit organization that supports trans, genderqueer, intersex and gender non-conforming individuals, their spouses, family, friends, and allies.

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Approved by the University of Saskatchewan Research Ethics Board

Before The Clinic Begins

Step 1: Planning the clinic	
Funding	Name change fees can run upwards of $200-300 depending on the region and many people who will access the clinic are not able to afford the fees for criminal record checks and changing their documents. We highly recommend including funding or bursaries as part of your ID Clinic to assist with some or all of the costs. Our entire clinic was funded by a $5,000 donation from a local member of the 2SGLBTQ+ community.
Forms	Request a stack of name and gender change forms from your provincial or territorial governing body (in SK it is eHealth). This helps facilitate the clinic more quickly than having each participant request their own forms.
Space	Notary signings need to be done in person. Ensure an accessible meeting space is available.
Process	Choose the form your clinic will take. The process will likely take more than one day for most participants, but you could identify which of the following options works best: 1) Run your clinic as a one-day session where participants sign up, bring all needed documentation, and notaries are on site for signing. This model is more time efficient for clinic staff, but more complicated for clients as they will need to get their police record check and other documents in the right timeframe before signing day; 2) Run your clinic as an ongoing case where you work with participants to collect relevant materials and documentation (including helping to navigate these steps) and then notarize their documents once they are ready, on a case-by-case basis. This model is more time consuming for the organization, but usually works better for participants; 3) Operate in a hybrid model that blends the two options identified above. For example, you make work with a number of clients over a month period to get their documents in place and then hold a one-day "signing session" where they must attend to get their documents notarized.

Signing	Ensure you have notaries available. More notaries may be needed if you plan to meet clients when they are ready for notary signing, rather than scheduling all signings on a designated day. It is helpful if clinic staff or volunteers are notaries.
Clinic Management and Feedback	Decide on a system to track confidential client information and to track client outcomes and lessons that you learn over the course of the clinic.

Step 2: Training the navigators

- ☐ The steps and requirements for changing one's name and/or gender markers: Trans Sask Support Services has created a thorough guide on the specifics of the Saskatchewan name change process that can be found here: https://www.transsask.ca/name-change-guide/. Each region/province will have slightly different steps that you will want to be familiar with.
- ☐ Education and training on 2STNBGN people and experiences: The pilot navigators noted that having lived experience helped them in assisting participants, particularly so that 2STNBGN clinic users do not have to explain themselves. If your navigators do not have lived experience of being 2STNBGN, reach out to local 2SLGBTQ+ organizations to request training.

Step 3: Creating an intake process

This is up to you and your organizational processes, but you can either:

a) Provide an email on the recruitment ad so that clients can email their interest and set up a brief intake interview with the navigator; or
b) Provide an intake form for interested persons to fill out and start the process

Whether by interview or form, intake should ask the following:

- ☐ The person's chosen name and pronouns (asking for their legal name is not necessary at this stage as they will have to include it anyway on future documents)
- ☐ Their contact information
- ☐ What they know about the name and gender marker change process
- ☐ Whether they intend to change their name, gender marker, or both

Step 4: Advertising the clinic

You may want to advertise the clinic on social media including the following information:

- ☐ The scope and purpose of the clinic
- ☐ Where people can sign-up, whether there is a deadline, any participant criteria
- ☐ Whether any funding or bursaries are available
- ☐ Where to direct follow-up questions

Tip: Reach out to local 2SLGBTQ+ organizations and ask them to advertise on social media. They will be most connected with the population in greatest need of the clinic

Operating The Clinic

Step 5: Intake clients

Use the process that you developed in step 3:

a) If sign-ups are low, keep advertising and explore other methods of reaching the intended audience

b) If sign-ups are higher than capacity, ensure you have established a waitlist and a clear system for tracking applicants

Step 6: Initial navigation session

Have an initial meeting with each client. Providing navigation will look different for each person depending on their level situation. Generally, it should include:

- ☐ Providing specific instruction about the timeline for name and gender marker changes, including the need to obtain the police record check and notarized documents within two weeks of submitting the application to eHealth
- ☐ Providing the name and gender marker change forms that you obtained from eHealth
- ☐ Determining whether or not they need financial support and clarifying the process for applying for bursaries and distributing funds
- ☐ If you are running a clinic that includes designated days for notary signing, ensure clients are aware of the timeline that they need to follow to have their supporting documents ready for this session
- ☐ Answering any other questions they have and having a good list of community supports to make additional referrals as needed

Step 7: Continued navigation support
Stay available to your client while they obtain the required documents. Answer any questions that come up and meet with the client again if they need additional support.
Tip: Provide funding to clients as seamlessly as possible. Clients will need to contact a large number of people in a short period of time in order to apply for legal name and marker change. The clinic should work to reduce the amount of work needed overall. Clear financial processes help to reduce workloads and confusion.

Step 8: Schedule notary signing	
One Day Clinic Model	Follow-up with clients in the lead-up to the notary signing to ensure they are aware of the timeline in which they need to have all their documents and obtain their police record check on time – the check must be obtained no more than 10 days before the signing day to allow a few days following to submit the application.
Ongoing Notarizations	Check in with clients regularly. When they are ready, ensure their notary signing is scheduled within 10 days of obtaining the police record check.

Step 9: Submit the application
The best strategy is to submit the application on behalf of your clients. If they submit themselves, follow-up to ensure they submitted the application in time.

Step 10: Post-submission follow-up
Check-in to see if the client's application was successful. Ask them to let you know the outcome and to provide feedback on the process.

Extenuating Circumstances

Clients born outside of Saskatchewan or Canada

Clients born out of province or country will often have a more complicated experience changing their name or gender marker. For these clients, eHealth requires that the birth certificate be changed with the province/country of birth first. In most cases this means a second application with its own set of unique challenges and a significant delay to the process. In some cases, other birth countries may not have a process or may not allow changes, and in this case, you can apply for an exemption with eHealth.

Timing and readiness

Clients may be able to obtain their supporting documents at different rates, some may drop out of contact or decide that they are not ready to change their name or gender marker right now. It's best to check in to make sure that a client has the resources (financial or otherwise) they need, but sometimes the timing is not right, and people will have to pick up the process at a later date.

Terminology

Navigator	A designated person that is responsible for supporting clients through the name/gender change process.
Gender Marker	The letter on one's identification that denotes the bearer's legal gender.
Legal Name	A person's legal name as indicated on their identification.
Chosen or Preferred Name	The name someone goes by, and to which they may be pursuing a legal change.

Trans ID Clinic Flow Chart