


Montefiore

HUMAN RESOURCES POLICY AND PROCEDURE MANUAL	SUBJECT: Preferred Name/Pronouns Policy
APPROVED:  DAVID BRODSKY	POLICY NUMBER: VII-24
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	DATE ISSUED: 11/20/2019
	DATE REVIEWED/REVISED: 10/17/22

GENERAL POLICY:

Montefiore recognizes that Associates may wish to be addressed by a preferred name and set of pronouns that align with their gender identity. For this reason, Montefiore allows Associates to identify a preferred name and set of pronouns where reasonably possible that align with their gender identity to ensure an inclusive and safe work environment.

Associates are required to use the name, pronouns, and title (e.g., Ms./Mrs./Mx.) with which a person (associate, patient, independent contractor, etc.) self-identifies, regardless of the person's sex assigned at birth, anatomy, gender, medical history, appearance, or the sex indicated on the person's identification.

POLICY APPLICABLE TO:

All Associates (including, but not limited to, employed physicians, attending physicians, house staff, students), vendors, independent contractors, agency workers, volunteers, visitors, and patients.

PROCEDURE:


In order to initiate the process of changing their name on Montefiore systems to align with their gender identity, an Associate must submit a Preferred Name Form to HR Recruitment & Staffing. The Preferred Name Form is available on the Montefiore Intranet in the Associates Forms and Information page.

A "preferred name" is the name other than one's legal name that aligns with their gender identity. A "legal name" is the name recorded on one's legal identification (i.e., passport, birth certificate, Social Security card) and used on official Montefiore records.

Associates who use a preferred name should be aware that preferred names are required to be disclosed in certain circumstances, including during background checks and other legal processes. Montefiore is under a continuing responsibility to report such names even if an Associate has discontinued use of the preferred name.

Restrictions regarding preferred name: Montefiore reserves the right to decline or revoke an approved preferred name if the preferred name may be used for criminal or misrepresentation purposes, may be harmful to the reputation or interests of Montefiore, and/or conveys inappropriate or offensive language/meaning. Abuse or misuse of this policy and process may result in disciplinary action.

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Preferred name will appear on:


- Associate ID badge
- Email Address
- Business Card, if Associate is issued a business card

NYS Department of Education regulations require that an identification badge display that person's legal name as it appears on their license. When making a request for a preferred name to be displayed on an identification badge, Associates must acknowledge and solely assume all risks of enforcement actions by the Department of Education for any violation of NYS DOE regulations.

Associate Responsibility regarding Use of Preferred Pronouns:

- Associates are required to use the name, pronouns, and title (e.g., Ms./Mrs./Mx.) with which a person (associate, patient, independent contractor, etc.) self-identifies, regardless of the person's sex assigned at birth, anatomy, gender, medical history, appearance, or the sex indicated on the person's identification.
- Associates are responsible for communicating their preferred name, pronouns, and/or title to colleagues, staff, and managers.
- Intentional or refusal to use a person's name, pronouns, or title is not permitted and would violate Montefiore policy. For example, repeatedly calling a transgender woman "him" or "Mr." after she has made clear that she uses she/her and Ms.
- Refusal to use a person's name, pronouns, or title because they do not conform to gender stereotypes is not permitted and would violate Montefiore policy. For example, insisting on calling a non-binary person "Mr." after they have requested to be called "Mx."
- Requiring an individual to provide information about their medical history or proof of having undergone particular medical procedures in order to use their preferred name, pronoun, or title is not permitted and would violate Montefiore policy.
- Conditioning a person's use of their preferred name on obtaining a court-ordered name change or providing identification in that name is not permitted and would violate Montefiore policy.
- Most people and many transgender people use female or male pronouns and titles. Some transgender, non-binary, and gender non-conforming people use pronouns other than he/him/his or she/her/hers, such as they/them/theirs or ze/hir. They/them/theirs can be used to

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identify or refer to a single person (e.g., “Joan is going to the store, and they want to know when to leave”). Many transgender, non-binary, and gender non-conforming people use a different name than the one they were assigned at birth.

- Asking someone in good-faith for their name and gender pronouns is not a violation of Montefiore policy.

Use of Legal Name:

Montefiore personnel are at times required to use an Associate’s legal name when conducting business (i.e., sending reports to federal, State, and other government agencies that require legal identity verification). Additionally, please note that some records may require the use of legal names only, such as legal and medical documentation (e.g., for purposes of employment eligibility verification with the federal government). Associates who are utilizing a preferred name should always be prepared to reference their legal name as well as provide their legal identification when necessary.

Legal name will appear on:

- All legal and medical records
- Paychecks & Paystubs
- Permanent Human Resources file
- Tax Records

Associates who have changed their legal name and already received identification with their new legal name must apply for new identification reflecting the new legal name following the same process and submitting the Change of Personal Information Form, which is available on the Montefiore Intranet in the Associates Forms and Information page, and proof of legal name change to Human Resources Information Center (HRIC).

Please review Human Resources Policy and Procedure VI-6 regarding “Non-Discrimination and Anti-Harassment”, which prohibits discrimination on the basis of gender expression, gender identity and the status of being transgender.

All Medical Center Human Resources policies and practices are guidelines and may be changed, modified or discontinued any time by the Medical Center’s Senior Vice President of Human Resources, or designee, with or without notice. Exceptions do not invalidate the basic policy.