
UNIVERSITY OPERATING PROCEDURE

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Title: Lived Name and Gender

Overview

The goal of these Lived Name and Gender Identity procedures is a consistent lived name and lived gender identity experience across university systems and use of one's lived name and gender wherever a legal name or legal gender is not absolutely necessary for legal, regulatory or reporting purposes.

The Lived Name and Gender Identity operating procedures allow members of the UVM community to indicate their lived (also known as preferred) first/middle/last name and/or gender identity to the university community regardless of whether they have legally changed their name or gender marker.

Ensuring that everyone have university-issued identification documents and displays of personal identification information that recognize their accurate gender identity and lived name is critically important to assuring equity and dignity for all in the learning, working and residential environments on campus.

As a public research university, UVM aims to collect accurate gender identity information for the purposes of assessing gender equity and reporting institutional metrics. As such, this procedure also provides guidance on the collection and reporting of gender identity, lived name and sexual orientation.

Applicability of the Procedure

This Operating Procedure applies to all members of the University community, including, without limitation, individuals who are faculty, staff, students, contractors, consultants, temporary employees, and affiliates of the University.

Definitions (for additional definitions please see the [Guidance document](#))

Gender Identity: The gender(s), if any, a person identifies with. An individual's gender is their gender identity, which can be the same or different from their sex assigned at birth.

Information Systems: A system that collects, stores, and processes data.

Primary Information Systems: An information system that collects, stores and processes the initial source of data.

Downstream Information Systems: An information system that receives data from the primary information system.

<u>Legal Gender:</u>	A gender appearing on a government-issued document.
<u>Legal Name:</u>	A name appearing on a government-issued document.
<u>Lived Name:</u>	A self-chosen or personal and/or preferred professional name used instead of a legal name.
<u>Preferred Name:</u>	The term “preferred name” still appears in many campus systems, but use of the term “lived name” is encouraged to avoid the perception that respecting someone’s lived name is optional.

Procedures

The University must provide multiple, equally recognized gender options on university-issued documents and IT systems, following the suggested language for expanded options whenever possible and at a minimum male, female and nonbinary, and an efficient process for members of the University community to amend their lived names and genders on university-issued documents, including eligible academic documents, and in IT systems. The legal names and genders of university community members, if different than the individual’s lived name or gender, must be safeguarded against unauthorized access and improper disclosure, and must not be published on documents or displayed in IT systems that do not require a person’s legal name or gender.

- The University must provide, multiple, equally recognized gender options on university-issued documents and IT systems, following the recommended language for expanded options whenever possible and at a minimum male, female and nonbinary. Guidance on language values is provided in a Guidance document. All systems must accept the maximum number of gender values possible from the suggested language. If your system cannot accept all values, please contact Enterprise Technology Services at UVMCIO@uvm.edu for support.
- All forms — whether physical/hard copy or virtual/electronic — provided to any individual entering into an academic or professional relationship with the University of Vermont that require the disclosure of gender must offer multiple, equally recognized gender options on university-issued documents and IT systems, following the recommended language for expanded options. When system limitations do not allow the full range of expanded options, at a minimum male, female and nonbinary must be offered.
- Collection of gender information must always come with an explanation, e.g. “This information is being collected for...” See Guidance for details.
- The lived gender selected by an individual must be used within the University of Vermont system in all settings and situations that do not require use of legal gender.
- Any individual entering into an academic or professional relationship with the University of Vermont may be permitted to indicate a lived name and gender to be used in the University of Vermont systems in all settings and situations that do not require a person’s legal name or gender. To indicate a lived name and gender visit: <https://account.uvm.edu/directory>.
- Any individual in an existing academic or professional relationship with the University of Vermont is permitted to amend their UVM records to reflect their lived name and gender identity at any time. Offices should avoid passing on the cost of updating records, issuing new identification cards, etc., to persons wishing to change their gender identity and/or lived name. To indicate a lived name and gender visit: <https://account.uvm.edu/directory>.
- All primary information systems, and any downstream systems which require the use of legal name, must provide the option for individuals to indicate a lived name in addition to a legal name.

- When a lived name is indicated, downstream systems shall not pull or receive legal name from primary IT resources unless access to legal name is required to perform a function for which the downstream system is used.
- The legal names and genders of university students, employees, alumni and affiliates, if different than the individual's lived name or gender, must be safeguarded against unauthorized access and improper disclosure, and must not be published on documents or displayed in information systems that do not require a person's legal name or gender.

Examples of documents or systems that may require use of legal name and/or legal gender include:

- Billing and Financial Aid documents (i.e. FAFSA)
- Transcripts
- Federal immigration documents
- Payroll and employment verification documents (e.g. I-9, W-2, W-4)
- Teacher certifications

Offices that need access to these documents or systems may have access to legal name and gender information. Staff in these offices must abide by data privacy rules and must be trained in the use of lived and legal names and genders.

- Guidance as to how gender-related demographic information should be collected and stored, and subsequently reported to federal agencies, is provided in the [Guidance document](#).

Contacts

Questions concerning the daily operational interpretation of this UOP should be directed to the following:	
Title(s)/Department(s):	Contact Information:
Director, Prism Center	prism@uvm.edu
Enterprise Technology Services	uvmcio@uvm.edu
Office of Institutional Research	oir@uvm.edu

Forms/Flowcharts/Diagrams

- None

Related Documents/Policies

- [FERPA Rights Disclosure Policy](#)
- [Guidance on collecting and reporting gender identity and sexual orientation](#)
- [Information Security Policy](#)
- [Information Security Procedures](#)
- [Privacy Policy](#)
- [Records and Document Requests Policy](#)
- [Records Management and Retention Policy](#)

Training/Education

Training will be provided on an as-needed basis as determined by the Approval Authority or the Responsible Official.

About This Procedure

Responsible Official:	Provost and Senior Vice President	Approval Authority:	Provost and Senior Vice President
Affiliated Policy Number(s):	None	Effective Date:	January 10, 2023
Revision History:	None		

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