



## Gender Marker & Name Change (GMNC) Clinic Workflow Roadmap

1. **Training & Preparation.** Participate in ICLS’s training and review supplemental materials provided in your initial client placement email, which includes:
  - a. A brief client description and client contact information.
  - b. Clinic PPT & Clinic Manual with sample completed forms and other helpful information; The contact information for an ICLS advocate, who you can email with questions/updates at any point during the GMNC process.
  
2. **Initial Client Consultation.** Schedule a virtual consultation within 5-10 business days of case assignment, if possible, to begin the GMNC process. If your client cannot accommodate video call, phone is fine.
  - a. **Be sure to use the client’s chosen name and pronouns.** This information should have been made available upon case assignment. If you are not sure, please contact L Orozco ([lorozco@icls.org](mailto:lorozco@icls.org)), ICLS Pro Bono Coordinator. It is also okay to ask your client directly for their pronouns, albeit in a respectful way.
  - b. Introduce yourself using your own pronouns.
  - c. Confirm with your client the best way to communicate (e.g., email or phone).  
**Please reach out to L Orozco if you experience any trouble getting hold of your client at any point throughout the process.**
  
3. **Provide the client with a brief overview of the process.** Please refer to the GMNC Clinic training manual for more information on the subpoints below.
  - a. Draft & file GMNC petition, supplemental local court forms, and fee waiver (if applicable).
  - b. No publication requirement.
  - c. Order to show cause – six-week waiting period post-filing & potential hearing if a valid, written objection is made.
  - d. Obtain certified copies.
  - e. Effectuate the order by amending identity documents with local, state and federal agencies.
  
4. **Gender marker change.** Assess whether your client wants a court ordered gender marker change (sometimes called a sex identifier change), or if they would benefit from such a change.

- a. **Not necessary in CA.** Explain that gender change order is not necessary to amend California ID/DLs or CA birth certificates, which only require the applicant's self-attestation.
- b. **Helpful for out-of-state documents.** If your client was born outside of California, some states require an order to change the gender marker on birth certificates. Be sure to check the National Center for Transgender Equality Center's [ID Documents Center Resource Page](#) to see if this applies to your client's state of birth (see the top of this document for a link).
- c. **Security and peace of mind.**

5. **Draft the name change petition (and gender marker change, if applicable) with your client's input.** The sample completed petition will guide you, but make sure to:

- a. **Triple check the intended name** – spelling, middle name(s), accent marks, etc.
- b. Discuss “reason for name change,” and ask whether the template language is acceptable.
  - i. The template language will read “To better match my gender identity.” That is language developed by various other California legal aid agencies, and generally accepted by the Courts.
- c. **Ask about the client's criminal background, whether they are on the sex offender registry, and if they are a part of any ongoing court proceedings.**
- d. Ensure that the correct Courthouse is selected for the client's petition. For Riverside County residents, please check [here](#). All San Bernardino County residents will be filing at the San Bernardino Justice Center.
  - i. Please do not use the Courthouse designated on the sample petition provided, unless applicable, as it may not be the appropriate venue. **The correct courthouse will depend on your client's zip code.**

6. **Review the GMNC Petition with your client.** Schedule a follow up call with your client to review the working draft and make any necessary revisions.

- a. Give the client a final overview of the next steps in the process during your petition review session and explain that they may be responsible for paying any associated court filing fees if they are not applying/eligible for a fee waiver. ICLS may cover the filing fees case-by-case, but ICLS cannot guarantee full cost coverage now.
- b. **Contact L Orozco for support if necessary.**

7. **Return GMNC petition to L Orozco ([lorozco@icls.org](mailto:lorozco@icls.org)) for final review, signing, and filing.**
8. **If a client raises other legal issues** that they need assistance with (e.g., advance healthcare directives, housing issues, family law matters, etc.) confer with your ICLS contact as needed and advise the clients to call the **ICLS intake line at 888.245.4257**.
9. **Amending identity documents.** An ICLS representative will update you once we successfully obtain a GMNC order for your client. **Please let ICLS know if you can assist the client with amending their core identity documents!** If so, L Orozco will follow up with the next steps.