



Gender Marker & Name Change (GMNC) Clinic Initial Meeting Questionnaire

Thank you for volunteering with ICLS’s GMNC Clinic – with your assistance, we can help TGNC/NB folx in the Inland Empire obtain a Court Order to change their name and/or gender marker that better reflects their identity.

This “Initial Meeting Questionnaire” is intended to help guide your first client meeting, and it should collect all the information necessary to complete the gender marker and/or name change court forms.

If you have any questions for ICLS, please contact L Orozco (lorozco@icls.org) or Matt Kugizaki (mkugizaki@icls.org).



1. Introduction.

- *Prior to your meeting, please make sure that you are in a private location, with a secure internet/phone connection. Please be sure to have reviewed the ICLS training manual, clinic roadmap, and other supporting materials.*
- *At the beginning of your meeting, please remember to introduce yourself (provide your own pronouns), briefly discuss your professional/legal background, role as an attorney/paralegal (privilege, confidentiality, etc.), and reiterate that you are here to collect information that will help you complete the gender marker and/or name change court forms on their behalf.*
- *Please confirm whether the client wishes to proceed with a name change only, or a name and gender change, as that will impact the forms that we are required to complete.*
- *It may also be helpful to temper the client’s expectations by letting them know that you may not be able to answer all their questions today, but you’ll write them down and promptly follow up after.*

2. General Information.

Full Chosen Name (i.e., name Petitioner seeks to assume):

First: Middle: Last:

Full Dead Name (i.e., Petitioner's current legal name):

First: Middle: Last:

Pronouns:

Have you legal changed your name before? (If applicable, ask for all other prior names).

Physical Address:

What county do you live in?

Updated Contact Information (Phone/Email):

Date of Birth:

Place of Birth (City, County and State):

Are you married? If so, will you be seeking an amended marriage license/certificate reflecting your name/gender change?¹

Do you have any children? If so, will you be seeking an amended birth certificate(s) reflecting your name/gender change?²

¹ Petitioners requesting the issuance of a new CA marriage license/certificate with a change of designation of the person as bride, groom, or having neither box checked and/or change of name must complete [Form NC-312, Marriage License and Certificate Attachment](#).

² Petitioners requesting the issuance of a new CA birth certificate for petitioner's child reflecting petitioner's change of gender/name must complete [Form NC-311, Birth Certificate for Child of Petitioner Attachment](#).

Are you currently on parole or registered as a 290 (i.e., sex offender registrant)?³ (If yes to either parole or 290, notify Jen Okerlund and L Orozco for further instructions).

3. Criminal Addendum⁴

Social Security Number:

CA ID/DL Number:

4. Legal Gender Change Information

What is the sex listed on your birth certificate?

Which marker do you wish to assign as your gender?⁵

5. Proper Filing Venue

³ As of September 2018, if you are in prison or jail or are on parole in California, you have the right to petition for a name/gender change court order without first obtaining permission from your warden, parole officer, or the Secretary of the Department of Corrections and Rehabilitation. However, at the time you file your petition, you must provide a copy of the petition to the relevant department. Please advise your clients that CDCR or the sheriff are allowed to file objections to the petition; if this happens, the court will schedule a hearing to make a determination. State law also has special rules for people who are on the state sex offender registry. In this case the court will change your client's name only if it determines that granting the application "is in the best interest of justice" and will not "adversely affect public safety." For additional information, and case strategizing, please contact L Orozco (lorozco@icls.org).

⁴ **Only San Bernardino County residents are required to complete**, among other local court forms, **the Criminal Addendum SB-13-00050-360**, i.e., the Declaration of Petitioner and Request for Records Check. Please be advised that as of April 2024 the most up-to-date version of the Criminal Addendum is dated 10/20/2022.

⁵ As of September 2018, it is possible to request a court order recognizing a change of gender to nonbinary. Thus, the options are female (F), nonbinary (X), and male (M).

- *On the court forms, you will be required to select and provide information about the courthouse where the petition will be submitted. In general, this is the courthouse located closest to the client’s home address (by zip code).*
- *If the client resides in Riverside County, please visit here for more information: <https://riverside.courts.ca.gov/FormsFiling/WhereToFile/where-to-file.php>.*
- *If the client resides in San Bernardino County, they must file with the San Bernardino Justice Center, please visit here for more information: <https://www.sb-court.org/general-information/where-can-i-file>.*

6. Fee Waiver

- *If you do not qualify for a fee waiver, you will need to pay the California Courts a filing fee for your petition.⁶ Riverside County residents can expect to pay \$450 in filing fees (not including certification costs), while San Bernardino County residents will pay \$435 (again, not including certification costs).*
- *Please refer to the following questions, if the client wishes to be screened for fee waiver eligibility:*

Are you employed? (If so, provide the Petitioner’s job title, employer’s name and employer’s business address).

Do you receive any means-tested public benefits? (If so, please list all the public benefits that the Petitioner receives).

If you do not receive any public benefits, how many people live in your household with whom you share expenses (e.g., sharing bills, food costs, or other financial support)? (Please provide the names of all those living in your household, age, relationship, and gross monthly income).

⁶ Please advise your client that the above fees are imposed by the California Courts system, and not by Inland Counties Legal Services. If your client does not qualify for a fee waiver, contact L Orozco (lorozco@icls.org). ICLS may be able to pay for a portion or the full cost through a separate, private funding source. ICLS cannot guarantee that it will cover the associated costs – the decision is made by ICLS senior management on a case-by-case basis.

If you do not receive public benefits, what is the combined monthly household income of everyone identified above?

7. Conclusion/Schedule a Follow Up Meeting

- *At the end of your meeting, it may be helpful to reiterate any next steps, ensure that the client understands the process (and ask if they have any questions), and, if applicable, schedule a follow-up meeting to review the completed forms with the client.*
- *A follow up/forms review meeting is scheduled for _____.*
- *If the client has additional legal issues, please take down a few notes of the general matter and refer over to L Orozco (lorozco@icls.org) for further assistance.*