

## Guidance Related to Student Gender, Sex, Pronouns, and Names

Introduction.....	1
Gender and Assigned Sex at Birth .....	2
Student Pronouns.....	2
Student Affirmed Name and Legal Name .....	3
Scenarios Related to Affirmed and Legal Names.....	3
Phased Approach for Release.....	3
Phase 1 (SchoolTool 21.1 / December 2023).....	4
Examples for Phase 1 .....	5
Phase 2 (SchoolTool 21.2 / Spring 2024) and Beyond .....	6
Examples for Phase 2 .....	6

### Introduction

Based on guidance released by NYS ([Creating a Safe, Supportive, and Affirming School Environment for Transgender and Gender Expansive Students: 2023 Legal Update and Best Practices \(nysed.gov\)](https://www.nysed.gov/transgender-and-gender-expansive-students-2023-legal-update-and-best-practices)), SchoolTool will be phasing in various features to support districts in managing students' gender and sex, preferred pronouns, and affirmed/legal names.

We are targeted to release the following features:

21.1 (December 2023)	21.2 and Beyond (Winter/Spring 2024)
<ul style="list-style-type: none"> <li>Assigned Sex at Birth</li> <li>Preferred Pronouns</li> <li>Allow entry of Legal Name and displaying in Personal Information Section only</li> <li>Reflect contact preferences for Affirmed/Legal Name to show on full and mobile site</li> </ul>	<ul style="list-style-type: none"> <li>Report Cards</li> <li>Mobile App</li> <li>Permission control of nickname visibility</li> <li>Other Reports Parents See</li> </ul>
<i>Custom reports will not automatically be updated; if you have a custom that needs to be updated, please follow the custom report change process.</i>	

The ultimate goal is to provide districts with the flexibility to track and manage information in a way that meets their needs. In addition, every attempt has been made to create a plan that allows districts to limit the information shared with contacts based on a student's individual preferences.

However, there are cases where students' gender identity, pronouns, and/or name data may be exposed to contacts prior to all work being completed. Updating a student's affirmed name prior to the completion of the changes in SchoolTool 21.2 may result in that change being shared with an audience that should not see that information.

Districts should review the following plan to ensure they are prepared to provide adequate information when advising students in advance of making changes in SchoolTool.

## Gender and Assigned Sex at Birth

SchoolTool includes fields for Gender and Assigned Sex at Birth that can be edited from the person record within the Census module. Access to view and/or edit these fields is controlled by permissions.

- **Gender:** This reflects the student’s gender identity. This field is required for students and may be set to Male, Female, or Non-Binary. Note that this field is distinct from the student’s assigned sex at birth and should be modified to reflect the student’s indicated gender identity rather than a representation of physical anatomical parts. There are no planned changes for this functionality in upcoming releases.

You can prevent non-district staff (students’ contacts) from viewing Gender on the student record by disabling the following permission:

- \Census\Person\Summary\View\Gender



- **Assigned Sex at Birth:** This reflects the student’s sex (male, female, or intersex) that a doctor or midwife uses to describe a child at birth based on their external anatomy. This field is new as of SchoolTool 21.1 (December 2023). By default, this value will not be specified and will be set to “Select One” unless a user has explicitly modified it.

In accordance with NYS guidance, access to view and/or edit this data should be granted only to medical personnel.

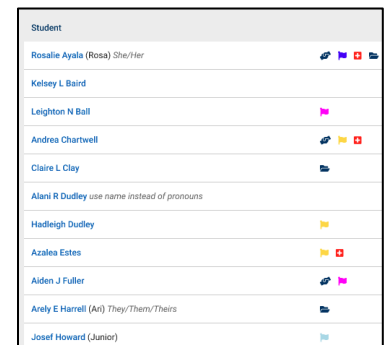
- \Census\Person\Summary\Edit\Assigned Sex at Birth
- \Census\Person\Summary\View\Assigned Sex at Birth



## Student Pronouns

A new field for Preferred Pronouns will be added to the student record in SchoolTool 21.1 (December 2023). The Preferred Pronouns field is an optional, free-text field (maximum 25 characters). This may be used to specify the student’s preference regarding pronouns (for example, “he/him/his/Mr.” or “they/them/their”) or simply to indicate that the student prefers the use of their name rather than any pronouns at all. Access to view and/or edit this field will be controlled by security permissions.

The new Preferred Pronouns data can be displayed in the Personal Information Section at the top of the student record. It can also be displayed on teacher rosters (both on-screen and printed class rosters) based on user permissions. This data will be introduced in additional areas throughout SchoolTool in future releases.



Student	Pronouns
Rosalie Ayala (Rosa) She/Her	She/Her
Kelsey L Baird	
Leighton N Ball	
Andrea Chartwell	
Claire L Clay	
Alani R Dudley use name instead of pronouns	
Hadleigh Dudley	
Azalea Estes	
Aiden J Fuller	
Arelly E Harrell (Ari) They/Them/Theirs	They/Them/Theirs
Joset Howard (Junior)	

Note that some districts previously tracked students’ pronouns using the existing Nickname field. The Nickname field is displayed on teacher rosters, attendance screens, and some grading screens. When a student has both a Nickname and Preferred Pronouns visible, teacher rosters will display both fields.

You may grant access to district staff to view and/or edit the Preferred Pronouns field on the student record as appropriate using the following permissions (districts wishing to restrict contacts from seeing this information can simply leave these permissions disabled for those users):

- \Census\Person\Summary\Edit\Preferred Pronouns
- \Census\Person\Summary\View\Preferred Pronouns

You can also grant access to teachers to allow display of Preferred Pronouns on their roster (both on-screen and printed versions) using the following permission:

- \My Home\Show Preferred Pronouns

## Student Affirmed Name and Legal Name

As of SchoolTool 21.1, districts will be able to track both affirmed name and legal name. In addition, the district can specify which name (affirmed or legal) each contact should see when accessing information for that student in the Parent Portal.

- **Affirmed Name:** A name that is validated by the individual; sometimes referred to as chosen name.
- **Legal Name:** The formal name by which a person is identified on a birth certificate or that has been changed through a legal process.

### *Scenarios Related to Affirmed and Legal Names*

- **Student with Affirmed Name that is the Same as Legal Name:** Students in this scenario have not specified an affirmed name that is different from their legal name.

Example: A student whose legal name and affirmed name are both Andrew (in other words, they wish to be referred to as Andrew).

- **Student with Updated Affirmed Name that is Different from Legal Name (Shared with All Contacts):** Students in this scenario have an affirmed name that is different from their legal name and would like that affirmed name to be shared with all users (including their contacts).

Example: A student whose legal name is Andrew but their affirmed name is Anna. This student might wish to change their name to Anna on all education records and is comfortable with all users, including their contacts, seeing this name throughout.

- **Student with Updated Affirmed Name that is Different from Legal Name (Not Shared with All Contacts):** Students in this scenario have an affirmed name that is different from their legal name and would like that affirmed name to be shared with all district staff but *not* with one or more of their contacts.

Example: A student whose legal name is Andrew but their affirmed name is Anna. This student might wish to be referred to as Anna while at school but continues to use their legal name for communications to their parents.

### *Phased Approach for Release*

The full solution for this will be implemented using a phased approach across multiple releases and will impact the full SchoolTool website, the mobile site, and the mobile app. As each phase is completed, additional areas within SchoolTool will be updated to respect the contact-specific setting to determine whether which name (affirmed or legal) that contact should see.

It is imperative that districts understand the impact of this approach in order to advise students on areas where contacts may be exposed to a student's affirmed name. Students wishing to update their affirmed name should be advised as to the areas that will be updated in each of these phases, as well as areas where affirmed name changes may be exposed, so that they can make an informed decision as to whether they want to make the change to their affirmed name or wait until all work is completed.

**Important Note:** Districts should be aware that even after *all* planned work in the phased approach below is complete, there may still be areas that may display the affirmed name (either within SchoolTool itself, on various reports, or in other applications that integrate with SchoolTool), regardless of the contact-specific setting to see legal name. Please also note that custom reports will not automatically be updated; if you have a custom that needs to be updated, please follow the custom report change process.

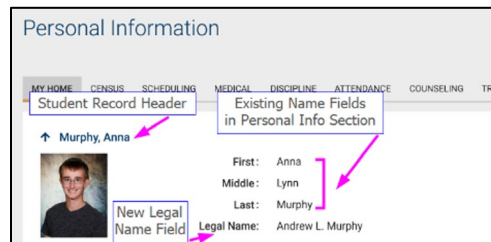
## Phase 1 (SchoolTool 21.1 / December 2023)

This phase will introduce the ability to indicate that a student's affirmed name is not the same as their legal name and will allow districts to store both affirmed and legal names separately. It will also allow districts to specify whether a contact should see the student's affirmed name or legal name when accessing the Parent Portal, **though it is critical to note that not all screens will be updated to respect that setting by the time this phase is completed.**

- Existing Name fields in SchoolTool include First Name, Middle Name, and Last Name. These will continue to exist and will be used to represent the student's affirmed name throughout SchoolTool. Labels will not be changed for these fields. Access to view and/or edit these fields in the Personal Information Section continues to be controlled by existing user permissions. Throughout the rest of SchoolTool, all district staff will see the student's affirmed name (this is existing functionality).

You can turn off existing permissions for any users (such as parents/contacts) to whom you do not wish to disclose this information. This will prevent users from seeing changes to a student's affirmed name (this is especially important if a student's contact is configured to only see the student's legal name). This will not prevent the appropriate name from being displayed elsewhere in SchoolTool, including on the student record header.

- `\Census\Person\Summary\View\First Name`
- `\Census\Person\Summary\View\Middle Name`
- `\Census\Person Summary\View\Last Name`

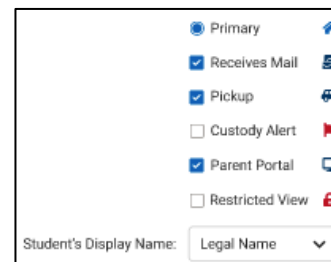


- New Legal Name fields (First, Middle, and Last) will be added in SchoolTool 21.1. These fields will also be controlled by permissions (these new permissions will be off by default for all users). Users with access to edit the Legal Name field will see a checkbox that allows them to indicate that the student's legal name is not the same as their affirmed name. They'll also see name fields to enter the student's legal name as appropriate. For district staff, the Legal Name field will *only* be displayed in the Personal Information Section and will not be visible in other areas throughout SchoolTool. By default, the Legal Name field will be empty for all students.

The new Legal Name permissions can be turned on for district staff that need to view and/or edit that information. Leave these new permissions off for users who shouldn't see it (this will prevent users from seeing whether or not a student has a legal name specified).

- `\Census\Person\Summary\Edit\Legal Name`
- `\Census\Person\Summary\View\Legal Name`

- Districts will also have the ability to indicate whether a student’s contact should see the affirmed name or legal name when logging into the Parent Portal. This allows the district to accommodate situations where a student wishes to use their affirmed name at school but may not be comfortable with one or more of their contacts seeing the affirmed name. This can be done on a per-contact basis and all relationships will be set to show the legal name by default. Access to view and/or edit this setting on the Contacts tab is restricted by user permissions (these permissions are off by default for all users).



Turn on Student Display Name permissions for district staff as appropriate to allow district staff to view and/or edit this setting for contacts. This will indicate which name is selected for each contact, so these permissions should be turned off for anyone who shouldn’t see that information.

- \Census\Person\Contacts>Edit Student Display Name for Contact
- \Student\Contacts>Show Student Display Name for Contact

Places that will respect the Display Name for contacts include the following:

- **My Home > Student Tab** (students only) and **My Home > Students Tab** (parents only)
- **My Home > Student Record** screens (Parent Portal), including the student record header, student photo popup, Contacts tab (siblings list), Call Order popup, and printed reports from the parent portal (*with the exception of report cards and progress reports, which will be updated in Phase 2*).
- These changes will be applicable to both the full website and the mobile site. The mobile app will be updated in Phase 2.

***It is important to note that when Phase 1 is complete, a number of areas within SchoolTool, including the mobile app and report cards, will continue to show Affirmed Name regardless of the Display Name setting.*** Students who are not comfortable sharing their affirmed name with one or more of their contacts should be advised of this as they may wish to wait to update their affirmed name until this is fully supported in SchoolTool.

### Examples for Phase 1

For students whose affirmed name matches their legal name or those who are comfortable with all users seeing their updated affirmed name, their first and/or last names may be modified at any time. In these scenarios, all users (including contacts) will automatically see the student’s affirmed name throughout SchoolTool.

For students who are not comfortable sharing their updated affirmed name with one or more contacts, the Display Name for each contact should be set according to the student’s wishes. All district staff will continue to see the affirmed name throughout SchoolTool, *but areas updated in this release will respect the Display Name for each contact.*

- **Example #1:** A student has asked the district to change their affirmed name to Anna but their legal name is Andrew. The student has also asked that their parents see only the legal name in the Parent Portal. The district would set each contact to use the legal name as the Display Name. When each parent logs in, they will see the student’s name as Andrew throughout the Parent Portal, with the exception of the areas not included in Phase 1.
- **Example #2:** The same student, Anna, has updated their affirmed name to Anna and is comfortable with their mother seeing the affirmed name. However, their father is not aware of the change and the student would prefer the father to continue seeing their legal name. In this case, the district would set the mother to use affirmed name but the father would be set to see

legal name. now when each parent logs in, they see the appropriate name based on the contact settings (so the mother would see the student's name as Anna, while the father would see the name as Andrew).

## Phase 2 (SchoolTool 21.2 / Spring 2024) and Beyond

Additional screens, including the mobile app, will be updated to support the Display Name setting for contacts. Report cards, progress reports, transcripts, and other reports parents are most likely to see, will also be updated at this time. This will complete the changes to Parent Portal.

Reports that are targeted for multiple recipients, such as report cards, mailing labels, and other reports that can be run as "one per household" or "to the parents/guardians of" a student, may not be able to accurately determine which name to display for contacts. In these situations, the report will display the student's legal name, if it exists, by default.

Districts should continue to be aware that there may be other areas, reports, or other applications that integrate with SchoolTool that could potentially expose a student's affirmed name to contacts that are otherwise set to see legal name.

Additional changes may be made as needed. This might include updates to permanent record reports such as canned transcripts to allow districts to specify whether they should show a student's affirmed name or legal name. This may also include updates to other areas in SchoolTool and/or changes to support integrations with third party applications. The scope of this ongoing work has not yet been determined.

### *Examples for Phase 2*

- For students who wish to update their affirmed name but have delayed doing so, districts can update this information and set the Display Name for contacts as appropriate. However, students should continue to be advised as to the areas that may potentially expose their affirmed name to contacts.
- Districts should perform an internal audit of reports and other materials that may be shared with students' contacts and evaluate permissions and processes. It's also critical that the district reviews any custom reports, including report cards, and update these reports as appropriate. Special care should be given to reports that are generated for multiple contacts (for example, letters addressed "to the parents/guardians of" a student).