



NAME CHANGES FOR THE TRANSGENDER COMMUNITY

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Hybrid Training

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Trainers:

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VIP is grateful to Adrian Lowe, Esq., of the AIDS Law Project and the Jaci Adams Identity Initiative, and Ballard Spahr LLP, including Elizabeth Lilly, Esq., for creating the content of this training manual and the accompanying template forms.

About Philadelphia VIP

Mission: Philadelphia VIP leverages the powerful resources of the community to provide quality volunteer legal services and ensure access to justice for low-income Philadelphians

Philadelphia VIP is the hub of pro bono legal services in Philadelphia. For the past forty-five years, we have provided legal services for low-income residents and families facing civil legal problems that threaten their basic human needs – shelter, employment, financial stability, education and health.

VIP, through its volunteers and staff, serves more than 3,500 individuals and families yearly who could not afford attorneys and whose cases could or would not be handled by other public interest organizations. We are the agency of last resort for the majority of our clients.

Our clients are among the poorest in the City and region and their numbers are growing. To be eligible for our services, a client's income must be at or below 250% or 300% of the federal poverty guidelines (depending on the case type). Thus, our most financially secure clients earn approximately \$48,000, while a family of 4 lives on under \$100,000.

VIP serves a multi-lingual population, principally Spanish speaking, but increasingly we see clients who speak Creole (Haitians), Chinese, Vietnamese and Cambodian, and Russian, a reflection of growing and changing immigration patterns in the Greater Philadelphia area.

VIP handles any civil matter that is non-fee generating and for which there is no right to counsel. Our caseload has four priority areas:

- Maintaining income (Estate planning, employment/wage claims, tax issues, disability, consumer debt, litigation defense)
- Preventing homelessness (probate, quiet titles, tangled titles, mortgage foreclosure, landlord/tenant evictions and appeals)
- Supporting family stability (child custody, adoption/guardianship, child support, divorce, and name change); and
- Promoting community economic development.

The majority of VIP's cases are referred to us from our sister organizations, Community Legal Services and Philadelphia Legal Assistance; an additional number come from specialized legal services organizations throughout Philadelphia.

In stark terms, VIP is the agency of last resort for many low-income individuals and families who face critical legal problems that affect their basic needs.

Frequently Asked Volunteer Questions

Q: What happens after I accept a VIP case?

A: After accepting a VIP case you will be sent a VIP referral form, all information included in the VIP file about the case and the VIP representation agreement. At this same time, your client will receive a letter with your name, address and phone number, and the request that they contact you within 7 days. You will receive a copy of this letter. At the first meeting you and the client should sign the VIP representation agreement. *The scope of representation should be filled in carefully, so that you and the client are clear about any limitations on your services.* (Contact VIP's Managing Attorney if you have any questions about the extent of your representation.) Keep the original in your file, give a copy to your client and send a copy to VIP.

Q: What if my client does not contact me?

A: Your client may fail to follow through for several reasons. Your client may have difficulty reading or understanding the letter, may not speak English, may not have received the letter or may have other more pressing problems. If your client does not call you within a few days of your receipt of the VIP letter, try to call the client. If after 10 days your client has not contacted you, and you cannot reach them by telephone, write your client stating that if you do not hear from them within 5 days, VIP will close their file. After 5 days, if your client still has not contacted you, call or write VIP, describing your attempts to contact the client. Under most circumstances, VIP will close the case, and another client can be referred to you.

Q: What if my client doesn't have a telephone?

A: Contacting a client who doesn't have a telephone can be challenging. We recommend that you send your client a letter asking the client to call you at a specific time on a specific date and time. If your client calls while you are on another line or away from your desk, ask your assistant to suggest a time for your client to call back. After your client reaches you, ask them for the telephone number of a neighbor, relative, and/or employer where you can leave a message if necessary. Another way that you can keep in touch with a client who doesn't have a telephone is to schedule weekly telephone "appointments". (For example, the client would call you every Friday at 1:00 p.m.) By keeping "appointments" you will have the opportunity to communicate information to the client.

Q: What if my client does not keep our appointments?

A: Terminating representation of a client due to his/her/their failure to cooperate is left up to the discretion of the volunteer. Some clients are simply uncooperative, while other clients have personal problems or mental impairments that interfere with their ability to keep appointments. Address this problem with your client and make it clear that without his/her/their cooperation you will be unable to help him/her/they. If, after the discussion, the situation continues, you should contact VIP's Managing Attorney and discuss closing the case.

Q: What if my client doesn't speak English?

A: If you are not fluent in the primary language of your client, VIP can arrange a volunteer to translate. Initially, we request that you first draw on your firm's resources. If your firm is unable to arrange an interpreter, please contact VIP and we will assist you. If the client speaks Spanish, VIP has Spanish-speaking staff members who have already translated many forms into Spanish. It is a good idea to ask your client for the telephone number of a friend, neighbor or relative of the client who can communicate with both of you. If you plan to relay confidential information through the client's interpreter, you should discuss this with your client.

Additional steps must be taken with the Court if your client does not speak English. If a hearing has been scheduled, you should contact the Court to inform the Court that your client will need an interpreter. In addition to the Court's interpreter who interprets the proceedings, you may want to have an interpreter with you at counsel table, so that you can communicate confidentially with your client during the proceedings. This interpreter is not provided by the Court. If you are submitting any documents that are not in English, the documents must be translated and the translation must be certified. VIP can provide information on how to certify the translation.

Q: What if I am fluent in another language and would like to volunteer to interpret for other volunteers?

A: VIP is always in need of volunteers with proficiency in foreign languages. We generally need interpreters who speak Spanish, Russian, French or Vietnamese. Whatever foreign languages you speak, however, please contact VIP because we may have a client who needs your help.

Q: What if there are costs associated with my representation?

A: VIP will cover certain costs only if approval is obtained from VIP before the cost is incurred. The costs encountered most often are:

- Photocopying medical records - You should first write the doctor and/or hospital and request that the fee be waived. If the doctor refuses, you should ask the client if he/she has the money to pay for the expense. If they do not, VIP may pay to obtain the records if VIP approves the cost before it is incurred.
- Filing fees - The client should qualify for In Forma Pauperis (IFP) status. An IFP petition must be filed with the Court. If the client's IFP petition is denied, the client must pay the filing fees unless VIP determines that the denial was unjustified. VIP has copies of IFP petitions and can explain to you the procedure for filing an IFP.
- VIP determines whether or not to cover litigation expenses on a case-by-case basis. If you would like VIP to cover a cost that is not listed above, please contact a VIP staff member to discuss.

Q: What if I determine that my case lacks merit?

A: You should not represent a client if you believe the case is not meritorious. Even if you do not represent your client, you provide a valuable service by explaining the situation to your client, advising your client of available options, and suggesting ways to avoid the problem in the future. If you are not sure of the merits of the case, contact a VIP staff member to discuss.

Q: What do I do when my case is finished?

A: You should write a letter to VIP stating the outcome of the case, providing the closing letter you sent to the client, estimating the number of hours you spent on the case, and indicating whether you are available to take another case.

Thank You for Volunteering!

UNDERSTANDING THE CURRENT ATMOSPHERE

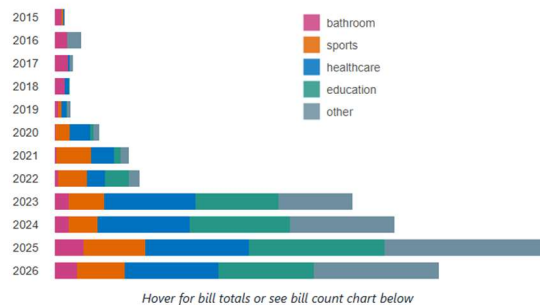
I. HELPFUL RESOURCES

A. LEGISLATION TRACKERS

1. ACLU Tracker - <https://www.aclu.org/legislative-attacks-on-lgbtq-rights-2025>
2. Trans Legislation Tracker - <https://translegislation.com/>

Tracking the rise of anti-trans bills in the U.S.

The United States has experienced a long rise in anti-trans legislation. Now it's surging.

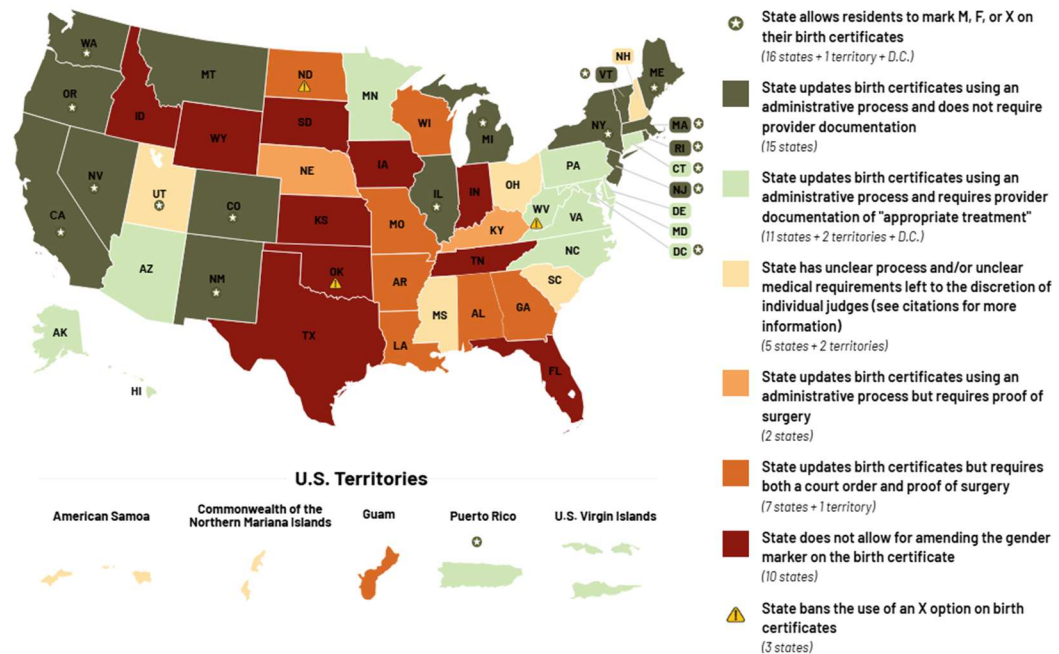


B. OTHER RESOURCES

1. Reporting from Erin Reed - <https://www.erininthemorning.com/>
2. Identification document Laws and Policies
 - a. Advocates For Trans Equality (A4TE) ID Documents Center - <https://transequality.org/documents>
 - i. Includes updated policies on federal records (including passports), driver's licenses, birth certificates, and gender markers

b. Movement Advance Project (MAP) – <https://mapresearch.org/equality-map/identity-document-laws-and-policies/#drivers-license>

i. Includes policies on driver’s licenses, birth certificates, and legal name changes



II. SUPPORTING TRANS PEOPLE

A. SELECTIONS FROM A *PHILADELPHIA INQUIRER* ARTICLE

1. How to Support Trans People in Philly, According to Trans People (PHILA. INQUIRER, Oct. 29, 2020, updated Apr. 1, 2021, <https://www.inquirer.com/philly-tips/transgender-support-ally-philadelphia-20201029.html>)

2. Context:

a. “‘We are currently in the midst of an extremely vitriolic period, where hate is fueled even from our nation’s highest office,’ wrote Tori Cooper, the HRC’s director of community engagement for the transgender justice initiative, in an email. ‘At times like these, we need allies to speak out on behalf of the entire community more than ever.’”

3. Understand that this has been a lifelong struggle:
 - a. Christian Lovehall (he, him), facilitator at Trans Masculine Advocacy Network and founder of the Philly Trans March – “I was assigned female at birth. But I was born me. I didn’t wake up one day and say, ‘Hey, I want to be a boy.’ I just knew that I didn’t identify with anything that was associated with being a girl. It just felt wrong.”
 - b. Naiymah Sanchez (she, her), Senior Organizer at the ACLU Pennsylvania – “For some reason, when people find out you are trans, they sometimes go the extra mile to dead-name* or misgender you. They think being trans is a laughing matter versus a struggle.”

4. You can be more than an ally:
 - a. Kendall Stephens (she, her), board of directors at the William Way Community Center – “Allies validate and uplift. Allies affirm the spirit. When allies affirm us, it shows us that they are in our corner. An ally takes every opportunity to spread messages of inclusion. Allies don’t let negative narratives about trans people to flourish in their spaces.”
 - b. Janis Stacy (she, her), activist: “If you have a fight [that is] right in front of you – you want a piece of legislation passed, you need help with a hate crime ordinance, or some religious group is persecuting you – an ally will go with you, but allies don’t tend to stick around after the fight is over. A true ally fights with you beyond the individual efforts. They are there with you over decades. An ally uses their privilege to get you through life.”

WORKING WITH CLIENTS WHO ARE IN THE TRANS COMMUNITY

I. PRONOUNS AND HONORIFICS

You need to be a person your client is safe to work with. It helps to ASK questions if you aren't sure of someone's identity, name, pronouns, etc.

Here is helpful information on pronoun and honorific options:

Please note that these are not the only pronouns. There are an infinite number of pronouns as new ones emerge in our language. Always ask someone for their pronouns.

Subjective	Objective	Possessive	Reflexive	Example
She	Her	Hers	Herself	She is speaking. I listened to her. The backpack is hers.
He	Him	His	Himself	He is speaking. I listened to him. The backpack is his.
They	Them	Theirs	Themselves	They are speaking. I listened to them. The backpack is theirs.
Ze	Hir/Zir	Hirs/Zirs	Hirself/ Zirself	Ze is speaking. I listened to hir. The backpack is zirs.

transstudent.tumblr.com
facebook.com/transstudent
twitter.com/transstudent

Design by Landyn Pan

For more information,
go to transstudent.org/graphics

TSER
Trans Student Educational Resources

▶▶ Current title

Mr

Mrs

Miss

Ms

Mx

Dr

Other

Some helpful tips to keep in mind are:

1. NEVER assume based on gender presentation or stated identity
2. ALWAYS use your client's chosen name and pronouns
 - a. A client may use alternating terms for their identity and may use more than one pronoun or no pronouns.
 - b. If you don't know, ASK ("What are your pronouns?")

II. MEETING YOUR CLIENT

A. TIPS FOR YOUR INITIAL MEETING WITH YOUR CLIENT

1. When meeting your client for the first time, introduce yourself and share your pronouns.
2. Inform your client that you do not need to talk about any medical information or their transition history. All you need to know is that the person in front of you wants to change their legal name!
3. Confirm their chosen name and pronouns
 - a. Whenever possible, open the file internally using these, to minimize the chance of deadnaming or misgendering.
 - b. Don't assume, just ask! Your client may use alternating terms to describe their identity and may use more than one pronoun, a neopronoun, or no pronouns.
 - c. Confirm when and where the chosen name and pronouns should be used.
 - i. For example, your client may not be out to their family, roommates, etc., so sending (postal) mail using their chosen name could out them and put them in an unsafe situation.
 - d. Remember that identity can change! Your client might use different terms to describe themselves compared with those they used in the past.
 - e. *Note:* "Dead-naming" is calling a trans person by the name they used before they transitioned.

B. HANDLING MISTAKES

1. If you make a mistake with your client's name, identity, or pronouns, correct yourself, quickly apologize, and move on.
2. Keep the focus on your client, not you.
3. Address any feelings later, with someone you trust – not with your client.
 - a. Your client likely faces misgendering regularly. Don't put them in the position of needing to reassure you that it's okay; that's more emotional labor of being trans or gender diverse in a world that is very cis- and hetero-centric.

HANDLING A NAME CHANGE CASE

I. INITIAL CLIENT CONTACT

A. REPRESENTATION AGREEMENT (OR ENGAGEMENT LETTER)

All VIP volunteer attorneys should have a representation agreement or engagement letter with their VIP client. VIP provides a template Representation Agreement on its website that you may use, but it is also acceptable to use your own template or an Engagement Letter.

Some volunteers choose to have their VIP client sign a representation agreement before beginning work on the case and having an initial client meeting. Others review and sign the representation agreement with their client at their initial call or meeting and have the client sign afterwards. (VIP can aid with electronic signature platforms if necessary; please contact a VIP staff member for more information.)

Once you have a representation agreement or engagement letter with your client, please send a copy to VIP for their file (by email is fine).

B. INITIAL CLIENT CALL

In your initial call with your client, make sure that you are always using their preferred name and pronouns. You should also explain that you will follow up your phone conversation with an email, so they know what they need to do next.

1. Ask the client for the following information:
 - the spelling of their full legal name and full chosen name (including middle names where applicable)
 - state of birth
 - current address and month and year they moved there
 - last 5 years of addresses, including timeframes (month and year)
 - whether they have a criminal record or outstanding judgments or warrants
 - if they have a criminal record or judgments, reassure them that this does not necessarily stop them from obtaining a legal name change; it just changes some of the requirements for the petition
 - if they have an outstanding bench warrant, discuss the risks of the court/ police being notified of the name change and the possibility of the bench warrant being effectuated

2. Discuss which information on government-issued ID docs can be updated via a legal name change and which cannot:

Document Type	State or Federal Document?	Can Name Be Updated?	Can Gender Marker Be Updated?
photo identification	state	Yes, and should be done following successful name change petition	Varies by state: <ul style="list-style-type: none"> • PA - yes, but requires a separate form • not allowed at all in 8 states • other states - may require form, letter from health care provider, and/or proof of surgery; see https://transequality.org/documents for a complete breakdown by state
birth certificate	state	Yes, but not required, following successful name change petition	Varies by state: <ul style="list-style-type: none"> • PA - yes, but must have a letter from a physician • not allowed at all in 10 states • other states - may require form, proof of surgery, and/or precise language to be included in the name change petition; see https://transequality.org/documents for a complete breakdown by state
Social Security record and card	federal	Yes, but not required, following successful name change petition	No, but note that there is no gender marker on the physical card
passport	federal	Yes, but not required, following successful name change petition	No, but note that there is no gender marker on the physical card Previously issued passports are still valid legal documents, until their expiration. Renewed passports will be issued with the gender assigned at birth. There is still uncertainty around how certain state agencies will treat previously issued passports with an X gender marker, since that designation is no longer available.

- a. It is important to discuss the above *before* filing a name change petition, for a few reasons:
 - i. to ensure that your client understands the effect and limitations of a legal name change
 - ii. to ensure that if a client intends to update a photo ID or birth certificate issued by another state, any required language is included in the name change petition

3. Explain that you will petition to have all fees waived, so presumably all they will be responsible for is the cost of fingerprints (about \$25) and the costs of updating their identification documents after the name change is final
 - a. The follow-up email will include instructions on fingerprints. We recommend Rosa's Photo Truck on 16th and Callowhill; they are very trans-inclusive and relatively inexpensive.

4. Schedule a time to meet with your client to review the drafted petition (and, if meeting in person, to gather needed documents from them).
 - a. You and your client are welcome to meet at VIP's office, if you prefer. Please reach out to a VIP staff member to arrange this.
 - b. Your client will need to give you the following documents:
 - copy of birth certificate (or green card, for non-U.S. citizens)
 - copy of driver's license or other state-issued photo ID
 - copy of Social Security Card
 - copy of proof of address (if driver's license/ government-issued ID does not reflect their current address)
 - original fingerprint card

If your client prefers to drop the above documents off at the VIP office, we can coordinate getting the documents to you.

5. Explain the timeline going forward.
 - a. Generally, it takes about 2-3 months after filing until the court issues a decree.
 - b. Assure your client that you will keep them updated throughout the process and as the court provides updates.

C. FOLLOW-UP EMAIL

After your initial call with your client, send your client an email with information on fingerprinting and a list of the documents you need to file a name change petition on their behalf. (See VIP template email.)

II. PREPARING AND FILING THE PETITION

A. CHECK FOR CRIMINAL CONVICTIONS

Most criminal convictions do not pose a barrier to proceeding with a name change. However, a very small number do, and others may require some information to be provided in the name change petition.

As a result, it is important that you have an accurate understanding of your client's criminal record before moving forward. If your client has a criminal conviction but is unsure of exactly what crime it is for, please contact a VIP staff member, and we can help.

- Misdemeanors → do not affect one's ability to legally change their name
- Felonies that are *not* listed in in 54 Pa. Cons. Stat. § 702 → completion of sentence, including parole, must have occurred more than 2 years ago
- Felonies that *are* listed in in 54 Pa. Cons. Stat. § 702 → lifetime bar to changes one's name

If your client's criminal conviction bars them from obtaining a name change at this time, please contact a VIP staff member to discuss next steps.

B. DRAFTING THE PETITION

Next, you should draft the Name Change Petition and accompanying documents, which include:

- Petition for Change of Name, including Verification
- Proposed Order for Hearing on Request for Waiver of Publication and Sealing of Record

- Proposed Order for Waiver of Publication and Sealing of Record
- Proposed Order for Hearing on Petition for Change of Name
- Proposed Decree for Change of Name
- Attorney Certification of No Fee
- Confidential Information Form

Please see the VIP Resource Library for these templates.

Here are some tips on drafting the petition:

- Update the caption with your client’s current legal name ONLY and the current month/year. (The caption appears on public records.)
- The petition requires your client’s addresses for the past 5 years. These addresses will also be necessary for judgment searches.
 - If your client has experienced periods of homelessness, you can list those as “no fixed address;” include the city or zip code if possible.
 - Be sure to redact the current address on the petition so it does not reveal the full house number or the apartment number.
 - This information will be available to the court through the Confidential Information Form, but redacting it in the petition increases the safety and privacy of the petitioner.
- If your client’s birth certificate is NOT from Pennsylvania, review the law of the issuing state for any specific language that will be required in the court decree, and draft accordingly.
 - [TransEquality.org](https://www.transequality.org) has a great resource on updating ID docs, with information on each state. For example, some states require the birth certificate number, birthdate, and/or location of birth to be included in the name change decree in order to update the birth certificate.
- If your client has a criminal record, ensure that you use the proper language in the petition depending on whether they have record of a misdemeanor or a felony.
- We recommend seeking a waiver of the publication requirement for all transgender, nonbinary and gender expansive clients.
 - Per 54 Pa. Cons. Stat. § 701, “If the court finds that the notice required in subparagraph (ii) would jeopardize the safety of the

person seeking the name change or his or her child or ward, the notice required shall be waived by order of the court.”

- Your client’s personal experiences are relevant, but even if your client has not personally experienced prior incidents of harassment, your client may have safety concerns based on risks created by publication.
 - For instance,
 - a. The Legal Intelligencer website maintains a list of individuals who have published their name changes that you can search, filter, and Google - <https://www.law.com/thelegalintelligencer/public-notices/>
 - b. If you would like to better understand the challenges that trans people face, we encourage you to review the results of the U.S. Transgender Survey at <https://www.ustranssurvey.org/reports>

C. REVIEWING THE PETITION WITH YOUR CLIENT

Once you have finalized the petition, you should review it with your client, either in person or by sending them a draft and then reviewing over the phone. It is often easiest to meet in person, if possible, so that your client can provide you with the required exhibits (see section D, below) and also sign the Verification on the petition.

In particular, you should ask your client to check for the following:

- Ensure that names (dead name and chosen name) are spelled correctly.
- Confirm that addresses are accurate.
- Review all other details for accuracy, including comparing them against the information provided on the required exhibits.
- Review template paragraph #7, regarding the reasons for the name change
 - We encourage and support clients in keeping this as simple as possible. The court does not need specific information, and we do not need to share private details more than absolutely necessary. That said, if your client would like to change the phrasing or add more details, it is fine to do so.
 - It is possible that some transgender clients will be changing their name to separate themselves from abusive or unsafe family members or situations. This is a valid reason for a name change and a valid reason to waive publication. If a client brings up this reason and/or would

like to avoid including their transgender identity as a reason for a name change, this is a permissible alternative.

Once the petition has been reviewed and is fully accurate, you should have your client sign the Verification at the end. **They can sign in their chosen name.**

D. INCORPORATING EXHIBITS

The following documents must be included as exhibits to the name change petition:

- copy of birth certificate (or green card, for non-U.S. citizens)
- copy of driver's license or other state-issued photo ID
- copy of Social Security Card
- copy of proof of address (if driver's license/government-issued ID does not reflect their current address)

After making a copy of all of the above documents for your records, you should create redacted versions of the first 4 documents (excluding the fingerprint card), blacking out the following information:

- first 5 digits of Social Security Number
- driver's license or state-issued ID number (in full)
- day of birth
- exact house/apartment number - e.g., "501 Main Street, Apt. #1" becomes "5XX Main Street, Apt. X"
- client's legal last name

Add the redacted versions of the exhibits to the petition.

E. FILING THE PETITION

Below is step-by-step guidance on e-filing the name change petition with the court:

1. Log onto the Philadelphia Courts e-filing system.
2. Select "**New Case.**"
3. From the dropdown menus:

- a. Program: **Petitions**;
- b. Case Type: **Change of Name (Adult)**;
- c. Hit **Continue**.

a Courts
ing System

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Program [Program/Case Type Help](#)

Case Type

Commencement of Action

Complaint Notice of Appeal

Petition Action Writ of Summons

Declaration of Taking

Name Change Petition - Helpful Hints
[Click Here](#)

Continue >>

4. Parties:
 - a. Party type: **Petitioner**;
 - b. **Select**: If party is an individual then enter the name below;
 - c. Enter **legal last name and legal first name**;
 - d. Select **"No"** for any AKA or Alternative name;
 - e. Street address:
 - i. **c/o Lawyer name**
 - ii. **Firm address**
 - f. **Decline** to provide birthdate;
 - g. Hit **"Add;"**
 - h. Hit **"Continue**.

Parties

Filing attorney will be automatically added as a party, please continue adding other parties.

*Party Type

*Entity ID

1 [Entity List](#)

If party is an individual then enter name below.

*Last Name First Name Middle Suffix²

*if party is a company.
(Maximum of 60 characters, abbreviate if necessary)

Is there an Alternative Name/AKA./DBA, etc. ? Yes No

*Street Address

*City
*State/Province
*Zip Code
[US Zip Codes](#) [Canada Postal Codes](#)
*Country

Please enter date of birth of party, if known:
 Unknown Decline to provide info.

Note: Date of birth information is intended for the Court's use only. The information will not be made available to the public.

²Suffix Name (Example: Jr, Sr, MD, III, PhD etc.)

²Suffix Name (Example: Jr, Sr, MD, III, PhD etc.)

-- Number of Parties entered: 1 --
Legal First Legal Last (Petitioner) , Decline to provide Birth Date
C/O Lawyer Name Address , Philadelphia, Pa 19103 , United States c

To remove a party, scroll through the list then click on the name and hit the "Delete" button.



5. Name change questionnaire: write "See petition" for everything except their name.
 - a. Reasons for name change: **See petition;**
 - b. Address: **See petition;**
 - c. Other/old address(es): **See petition;**
 - d. Years: "5" total of all address(es) stayed above;
 - e. Current name: **LEGAL FIRST LEGAL LAST;**
 - f. New name: **Chosen name;**
 - g. Re-enter New name: **Chosen Name;**
 - h. Hit "continue."

Philadelphia Courts
Case Management System

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Name Change Questionnaire
 Please enter the address(es) where you have resided (e.g. "123 MAIN STREET, PHILADELPHIA, PA 19107") from the newest to the oldest and enter the total years. The new name must be re-entered and must be checked for spelling errors.

Reasons for Name Change

Address

Other/Old Address(es)

1.

2.

Years Total of all address(es) stayed above

Current Name


New Name

Re-enter New Name

(Maximum of 30 characters)


Personal Reference No.

If you have any numbering system in your office, enter it here.



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6. To the Office of Judicial Record:
 - a. **Check the box** to enter your appearance;
 - b. Review the contacts for electronic notice for accuracy.

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TO THE OFFICE OF JUDICIAL RECORDS:
 Kindly enter my appearance on behalf of Plaintiff/Petitioner/Appellant/Other:
 (check all the names below that apply)

Legal First Legal Last (Petitioner)

7. Uploading files
 - a. Does your filing contain Confidential Information? **YES;**
 - b. Does your filing contain Confidential Documents/Exhibits: **NO;**
 - c. Is there any portion of your filing being filed UNDER SEAL pursuant to a court order? **NO;**
 - d. Select **“Upload Documents.”**

Please respond accordingly below:

Does your filing contain Confidential Information? Yes No
Note: If your filing contains Confidential Information, a Redacted Version of your filing and the Confidential Information Form must be uploaded. Click [here](#) for a list of information considered confidential as defined by the US Public Access Policy.

Does your filing contain Confidential Documents/Exhibits? Yes No
Note: Click [here](#) for a list of documents considered confidential as defined by the US Public Access Policy.

Is any portion of your filing being filed UNDER SEAL pursuant to a court order? Yes No

Click to open Upload Screen, ensure the block pop-up windows option is not checked

Upload Documents

WARNING: Please ensure that all documents you intend to submit for filing are uploaded before continuing. Be aware, if you uploaded any document more than sixty (60) days prior to the current date, the document will need to be uploaded again. The system cannot maintain documents uploaded to a filing in draft status for more than sixty (60) days. Therefore, the document will be removed and must be uploaded again.

- e. On the first pop-up (Redacted documents file upload area),
 - i. Click **“Choose file;”**
 - ii. Select the completed redacted **Petition;**
 - iii. Click **“Add file now;”**
 - iv. Click **“Finish/Next.”**

REDACTED DOCUMENTS FILE UPLOAD AREA

In this area, only upload all REDACTED versions of the documents from which all CONFIDENTIAL INFORMATION has been removed.



Please limit the maximum file size for each document to 50Mb
and do not use these characters in the file name * ? < > | # { } ~ : &

Choose a file to attach: (must be a PDF file)

Choose File Name Chan...XAMPLE.pdf

Add file to the list:

Add File Now [Click here to estimate the file download time](#)

Current File Attachments:

	File Name	Size
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To delete an attachment, check the file you want deleted then click on the delete icon.

A file format created by Adobe®

Click the FINISH button after all REDACTED files have been uploaded.

Finish/Next Note: These documents will be viewable by the public.

V.

REDACTED DOCUMENTS FILE UPLOAD AREA

In this area, only upload all REDACTED versions of the documents from which all CONFIDENTIAL INFORMATION has been removed.



Please limit the maximum file size for each document to 50Mb
and do not use these characters in the file name * ? < > | # { } ~ : &

Choose a file to attach: (must be a PDF file)

Choose File No file chosen

Add file to the list:

Add File Now [Click here to estimate the file download time](#)

Current File Attachments:

	File Name	Size
<input type="checkbox"/>	Name Change Petition Packet - EXAMPLE.pdf	710,993 bytes

To delete an attachment, check the file you want deleted then click on the delete icon.

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Click the FINISH button after all REDACTED files have been uploaded.

Finish/Next Note: These documents will be viewable by the public.

- f. On the second pop-up (Confidential information form file upload area),
 - i. Click **“Choose file;”**
 - ii. Select the completed **Confidential Information Form;**
 - iii. Click **“Add file now;”**
 - iv. Click **“Finish/Next.”**

CONFIDENTIAL INFORMATION FORM FILE UPLOAD AREA
 In this area, only upload the CONFIDENTIAL INFORMATION FORM.

Please limit the maximum file size for each document to 50Mb
 and do not use these characters in the file name * ? < > | # { } ~ : &

Choose a file to attach: (must be a PDF file)
 Choose File Confidential ...AMPLE.pdf

Add file to the list:
 Add File Now [Click here to estimate the file download time](#)

Current File Attachments:

	File Name	Size

To delete an attachment, check the file you want deleted then click on the delete icon.

A file format created by Adobe®

Click the FINISH button after all CONFIDENTIAL INFORMATION FORM/FILE have been uploaded.

Previous Finish/Next Note: These documents will be viewable by court personnel and case participants, but not the public.

CONFIDENTIAL INFORMATION FORM FILE UPLOAD AREA
 In this area, only upload the CONFIDENTIAL INFORMATION FORM.

Please limit the maximum file size for each document to 50Mb
 and do not use these characters in the file name * ? < > | # { } ~ : &

Choose a file to attach: (must be a PDF file)
 Choose File No file chosen

Add file to the list:
 Add File Now [Click here to estimate the file download time](#)

Current File Attachments:

	File Name	Size
<input type="checkbox"/>	Confidential Information Form - EXAMPLE.pdf	167,221 bytes

To delete an attachment, check the file you want deleted then click on the delete icon.

A file format created by Adobe®


Click the FINISH button after all CONFIDENTIAL INFORMATION FORM/FILE have been uploaded.

Previous **Finish/Next** Note: These documents will be viewable by court personnel and case participants, but not the public.

- g. On the third pop-up (Public documents containing no confidential information file upload area),
i. Click "Finish;"

PUBLIC DOCUMENTS CONTAINING NO CONFIDENTIAL INFORMATION FILE UPLOAD AREA

In this area, only upload all documents that are neither considered CONFIDENTIAL nor contain CONFIDENTIAL INFORMATION.



Please limit the maximum file size for each document to 50Mb
and do not use these characters in the file name * ? < > | # { } ~ : &


Choose a file to attach: (must be a PDF file)

Choose File | No file chosen

Add file to the list:

Add File Now [Click here to estimate the file download time](#)

Current File Attachments:

	File Name	Size
		

To delete an attachment, check the file you want deleted then click on the delete icon.

A file format created by Adobe®

Click the FINISH button after all PUBLIC DOCUMENTS CONTAINING NO CONFIDENTIAL INFORMATION files have been uploaded.

Previous **Finish** Note: These documents will be viewable by the public.

h. Select the box to “Click here to certify compliance with the UJS Public Access Policy;”

i. Click “Continue.”

Click to open Upload Screen, ensure the block pop-up windows option is not checked

Upload Documents

WARNING: Please ensure that all documents you intend to submit for filing are uploaded before continuing. Be aware, if you uploaded any document more than sixty (60) days prior to the current date, the document will need to be uploaded again. The system cannot maintain documents uploaded to a filing in draft status for more than sixty (60) days. Therefore, the document will be removed and must be uploaded again.

Redacted Documents From Which Confidential Information Has Been Removed	
File Name	Size
Name Change Petition Packet - EXAMPLE.pdf	710,993 bytes

Confidential Information Form	
File Name	Size
Confidential Information Form - EXAMPLE.pdf	167,221 bytes

Documents Which are Not Confidential and Which Do Not Contain Confidential Information	
File Name	Size
No uploaded document(s) found for this section.	

Total Documents Uploaded: 2


Certification Regarding Compliance with UJS Public Access Policy:

I certify that the filing complies with the provisions of the *Public Access Policy of the Unified Judicial System of Pennsylvania Case Records of the Appellate and Trial Courts* that require filing confidential information and documents differently than non-confidential information and documents.

[Click here to certify compliance with the UJS Public Access Policy](#)

Name Change Petition - Helpful Hints
[Click Here](#)

<< Back **Continue >>**



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8. Select "Are you filing In Forma Pauperis and without payment of filing fees?"
 - a. Click "Continue."

You are in Page | 1 | 2 | 3 | 4 | 5 | **6** | 7 | 8

Total fee for this filing: \$ 348.23

Credit Card Payment

Are you filing In Forma Pauperis and without payment of filing fees?

<< Back Continue >>

9. Review all the information on the final page;
 - a. Click "Check to acknowledge;"
 - b. Click "Submit."

I have read the information supplied above and verify that subject to penalties relating to unsworn falsification to authorities, the above information is true and correct.

Check to acknowledge

<< Back Submit

c.

10. You should receive an email confirming your submission and providing you with your e-filing number. Once the court has accepted the filing, you will receive another email with your case number. **This second email will also include the court-provided IFP to use when submitting fingerprints and conducting judgment searches.**

F. ATTORNEY CERTIFICATION OF NO FEE / IFP

Once you complete your e-filing, the e-filing system will auto-generate a Praecipe to Proceed *In Forma Pauperis*. It is best to keep both this Praecipe, as well as the filed Attorney Certification of No Fee, handy when interacting with the court in the rest of the case, to ensure that court fees (like filing fees, judgment search fees, and certified copy fees) are waived.

G. PROVIDE FINGERPRINT CARD TO THE COURT

Within 10 days of completing the e-filing process, you should drop off the original fingerprint card to Discovery Court (City Hall, room 691). You should include:

- a cover letter (see VIP Resource Library for a template)
- the original fingerprint card
- the court-provided Praecepto to Proceed IFP

III. COMPLETING THE CASE

A. MONITOR DOCKET, AND UPDATE YOUR CLIENT

Once the court accepts the petition (which happens fairly quickly), you should update your client and give them their case number. You should explain that the next steps are background checks and waiting on a hearing date from the court, and that you will update them as steps are completed. (See template email to client in the VIP Resource Library.)

Once the court sets a hearing date and waives the publication requirement (which is very likely; please contact a VIP staff member if that does not happen in your case), it will send you a notice. You should confirm that your client is available for the hearing date, but explain that as long as the background checks are clear and nothing unexpected happens, they will not actually need to show up in person for the hearing date.

B. CONDUCT JUDGMENT SEARCHES

Once the court sets a hearing date, you should conduct judgment searches. These must be done within 30 days of the hearing date.

Judgment searches must be done in two court divisions in Philadelphia, as well as outside of Philadelphia if your client lived outside of Philadelphia County in the past five years. Below is detailed information on how to conduct these judgment searches.

1. Family Court judgment search:

- Complete the family court judgment search form with your client's name, birthdate, and social security number. (See VIP Resource Library for template form.)
- Bring the judgment search form and a copy of the court-generated Praecepto to Proceed IFP to the Family Court building at 1501 Arch Street.
 - Go through security and up to the 8th floor.
 - Walk past the additional security/check-in desk and go to the right to desk 1. You should not need to get a ticket to wait; desk 1 is for attorneys/represented clients.
 - Tell the clerk you need to do a family court judgment search and that your client has had fees waived. Hand them the Family Court Search Form and the Praecepto to Proceed IFP.

2. Civil Court judgment search:

- Bring a copy of the court-generated Praecepto to Proceed IFP with you.
- Visit City Hall, Room 264, Office of Judicial Records – Civil Filing Unit.
 - Ask the clerk to conduct a civil judgment search, and tell them your client has had fees waived. Give the clerk the IFP.

3. Out-of-county judgment searches:

- If your client has lived outside of Philadelphia County in the past five years, you need to conduct a judgment search in all such counties.
- Google “[county name] civil judgment search” to determine the process (e.g., a publicly accessible website similar to Philadelphia's, or calling the county Prothonotary's office to have them conduct a search).
 - If you have any trouble determining the process for a given county, please contact a VIP staff member for assistance.

C. FILE JUDGMENT SEARCH RESULTS WITH THE COURT

1. If the Philadelphia judgment searches (Family or Civil) yielded no results, you should submit the completed form (for Family Court) or search results (for Civil Courts) to Discovery Court in City Hall, Room 691.
2. If the Philadelphia judgment searches (Family or Civil) yielded results, you should:
 - send a letter to the relevant creditor(s) notifying them of the pending legal name change,
 - prepare an Affidavit Regarding Judgments, *and*

- submit the Affidavit, with the letter to creditor(s) as an exhibit), to Discovery Court in City Hall, Room 691).
3. If your client required any out-of-county judgment searches, you should:
- send a letter to any relevant creditor(s) notifying them of the pending legal name change,
 - prepare an Affidavit Regarding Judgments Outside Philadelphia, *and*
 - submit the Affidavit, with the letter to creditor(s) as an exhibit), to Discovery Court in City Hall, Room 691).

Note that an Affidavit must be submitted for all out-of-county judgment searches, *regardless* of whether the search yielded results.

D. PUBLISH NOTICE (IF REQUIRED)

The court generally does not require publication in gender-affirming name change matters. If the court does require publication in your VIP case, please contact VIP for guidance.

E. FINAL STEPS WITH THE COURT

Generally, the court will not require a hearing to issue a decree granting your client's name change. You should do the following to ensure that the court has what it needs and issues a decree granting the name change:

1. *One week before the hearing date*, call Nora Gallagher at Discovery Court ((215) 686-7974, nora.gallagher@courts.phila.gov) to ask for an update on the police background checks and to confirm whether a hearing will be held.
 - a. If the police report has come back clear, there will be no hearing.
 - b. If the police report has not come back yet but Nora expects it will be clear, she will likely inform you that there will be no hearing. If something unexpected comes up later, she will request an affidavit explaining the situation and proof of notification to any relevant parties (creditors or supervision officers), or in very few cases, a hearing may be rescheduled.
2. *Assuming that Nora confirms that there will be no hearing*, contact your client to confirm that they do not need to show up anywhere on the hearing date and that a decision will be made on the papers. If the police report already came back, tell them that the signed decree should be available within 2 weeks of

the hearing date. If the police reports have not come back yet, it may take longer to get the signed decrees.

3. *About one week after the scheduled hearing date*, call or email Discovery Court ((215) 686-7914), to check on the status of the case, and update your client accordingly.
4. *Once the court has issued a decree granting the name change*:
 - a. Contact Nora Gallagher ((215) 686-7974, nora.gallagher@courts.phila.gov) to request that five (5) certified copies of the decree be prepared.
 - b. Go to City Hall in person to pick up the original decree and the certified copies.
 - i. It is recommended that you go in person to pick up the decree, because they often get lost or delayed in the mail.

F. FINAL STEPS WITH YOUR CLIENT

Once you have the decree and certified copies in hand, arrange a meeting with your client, either by phone or in-person:

- *If you meet in person*, prepare your closing letter ahead of time.
 - You and your client are welcome to meet at VIP's office, if you prefer. Please reach out to a VIP staff member to arrange this.
- *If you meet over the phone*, you will need to mail your client a closing letter, along with the original and certified copies of the decree.
 - Confirm with your client that they are able to reliably receive mail at their address.
- *Regardless of whether you meet in person or over the phone*, we recommend emailing a copy of the closing letter to your client, because it contains links to many of the forms that they will need to complete to update their name.

In your final meeting with your client, you should:

- Provide your client with the original decree and the certified copies.
 - Encourage them to keep the decree and certified copies safe, and remind them that if they ever need more, either you or they can request more from City Hall.

- Review the guidance in the closing letter with your client on the next steps they should take to update their identification documents.
 - Generally, your client should update their name on their Social Security record and card first, and then the name and gender marker (if so desired) on their state-issued ID/driver's license, because those are often needed for other processes.
 - Once your client's Social Security record is updated, the IRS will receive notice of the change. As a result, your client should update their name with their employer before W-2s are issued.
 - If your client experiences any problem updating their name and/or gender marker with the DMV, you (or VIP staff) can prepare a letter for your client to take with them to the DMV that references the court order granting the name change and explains that the client has the documentation needed to update their state-issued ID. (Please contact VIP staff for further help with this.)
 - Your client can choose whether to update their name and gender marker (if so desired) on their birth certificate.
 - If your client chooses not to update their birth certificate, they should understand that, in the future, they may need to present a certified copy of their name change decree to show a legal connection between the name on their Social Security card and state-issued ID and the name on their birth certificate.
 - Your client can choose whether to update their name on their passport and green card (if applicable).
 - If your client chooses not to update these documents, they should understand that, in the future, they may need to present a certified copy of their name change decree to show a legal connection between the name on their Social Security card and state-issued ID and the name on their passport or green card.
 - You or your client can visit <https://transequality.org/documents>, for more specific guidance on how to update the various identification documents.

Once you have provided the closing letter and decree/certified copies to your client, **please email copies of both to a VIP staff member, with an estimate of how many hours you spent on your client's case.** VIP will then close the case in our office as well.

RESOURCES

I. COURT CONTACTS

Here is the information for key contacts at the court:

- Office of Judicial Records (clerk or prothonotary's office):
 - City Hall, Room 284
 - (215) 686-6652

- Discovery Court
 - main phone number: (215) 686-7914
 - Nora Gallagher: (215) 686-7974, nora.gallagher@courts.phila.gov

II. SUBSTANTIVE LAW

A. STATUTORY LAW

Pennsylvania statutes provide avenues for both informal and legal name changes:

- 54 Pa.C.S.A. § 701(b), Informal Change of Name:
 - “Notwithstanding subsection (a), a person may at any time adopt and use any name if such name is used consistently, nonfraudulently and exclusively.”
 - This statute permits individuals to legally use and go by any name that they choose, as long as they are not trying to commit fraud.

- 54 Pa.C.S.A. § 701(a1), Procedure:
 - (1) An individual must file a petition in the court of common pleas of the county in which the individual resides.
 - This statute lays out the process for legally changing your name through the court, which is necessary to update your government-issued identification documents.

B. CASE LAW

1. An individual can seek a legal name change for any non-fraudulent reason, as long as there is not statutory bar. (See *In re McIntyre*, 715 A. 2d 400 (Pa. 1998).)
 - a. See VIP Resource Library online for the entire opinion.
2. Individuals who have been convicted of a felony not enumerated in 54 Pa.C.S.A. § 701(c)(2) and who satisfy the requirements of 54 Pa.C.S.A. § 701(c)(1) must be granted a hearing for the court to grant or deny the petition. The trial court erred by denying the petition without holding a hearing. (See *In re A.S.D.*, 175 A.3d 339 (Pa. Super. Ct. 2017).)
3. An individual wishing to change their name in order to adopt the surname of their partner shall not be denied if they are otherwise eligible, simply because their partner is of the same sex. (See *In re Miller*, 824 A.2d 1207 (Pa. Super. Ct. 2003).)

III. ADDITIONAL NOTES ON PRONOUNS AND GRAMMAR



Allyship Beyond the Basics: Personal Pronouns and Why They Matter

Why should you include your pronouns when you introduce yourself?

1. It's a quick and easy way to **vocalize inclusion** as well as to support, celebrate, and affirm our transgender and nonbinary colleagues.
2. It communicates **where our values lie** and that we envision a world where diversity is celebrated and all people are respected, valued, and affirmed inclusive of their sexual orientation, gender identity, and gender expression.
3. It can be **a conversation starter** that allows us to lead with our allyship and educate new and potential allies about gender identity, gender expression, and the gender spectrum.

Pronouns: The basics and beyond!



	Pronoun	Nominative	Oblique	Possessive	Possessive	Reflexive
Have questions about a pronoun that is not included here?	He	He is laughing	I called him	His eyes gleam	That is his	He likes himself
	She	She is laughing	I called her	Her eyes gleam	That is hers	She likes herself
	They (most common)	They are laughing	I called them	Their eyes gleam	That is theirs	They like themselves
Google the term "neopronoun"	Xe "zee"	Xe is laughing	I called xem	Xyr eyes gleam	That is xyrs	Xe likes xemself
	Ze "zee"	Ze is laughing	I called zir	Zir eyes gleam	That is zirs	Ze likes zirself



pflag.org

IV. IMPACT OF ANTI-LGBTQ+ DISCRIMINATION

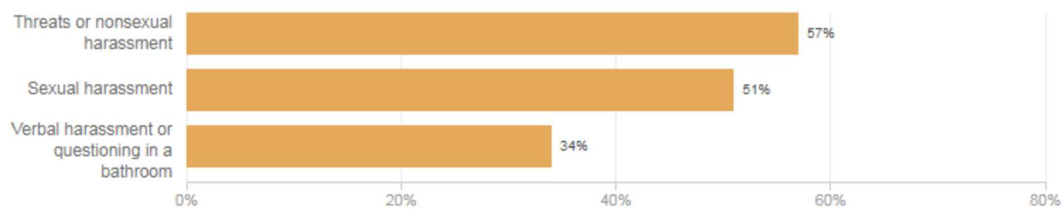
Percentage of LGBTQ Americans saying they or an LGBTQ friend or family member has experienced violence because they are LGBTQ



Source: NPR/Robert Wood Johnson Foundation/Harvard T.H. Chan School of Public Health: "Discrimination in America: Experiences and Views of LGBTQ Americans." Survey of 489 U.S. adults conducted Jan. 26-April 9, 2017. The margin of error for the full LGBTQ sample is +/- 5.5 percentage points. Each question was asked of half of the sample.

Credit: Matthew Zhang/NPR

Percentage of LGBTQ Americans saying they or an LGBTQ friend or family member has experienced various forms of individual discrimination because they are LGBTQ

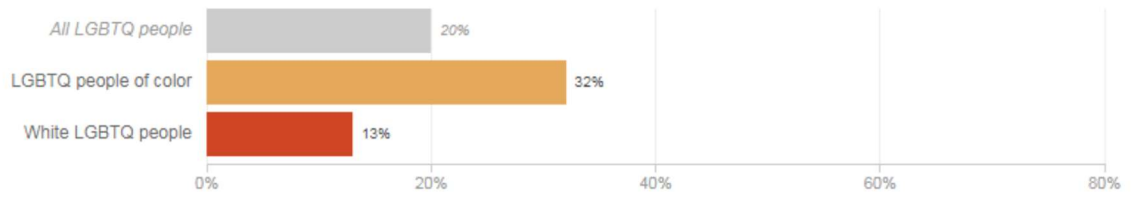


Source: NPR/Robert Wood Johnson Foundation/Harvard T.H. Chan School of Public Health: "Discrimination in America: Experiences and Views of LGBTQ Americans." Survey of 489 U.S. adults conducted Jan. 26-April 9, 2017. The margin of error for the full LGBTQ sample is +/- 6.6 percentage points. Each question was asked of half of the sample.

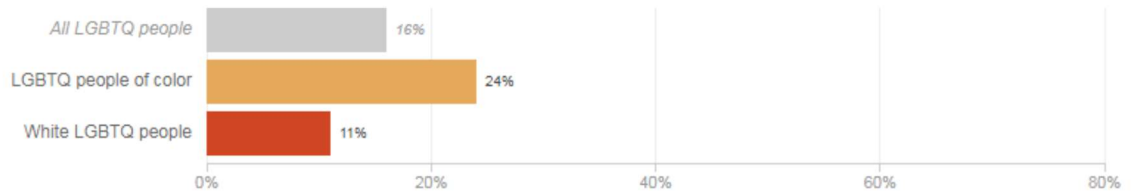
Credit: Matthew Zhang/NPR

Percentage of LGBTQ people, by race or ethnicity, saying they have ever been **personally discriminated against** in each situation because they are LGBTQ

APPLYING FOR JOBS



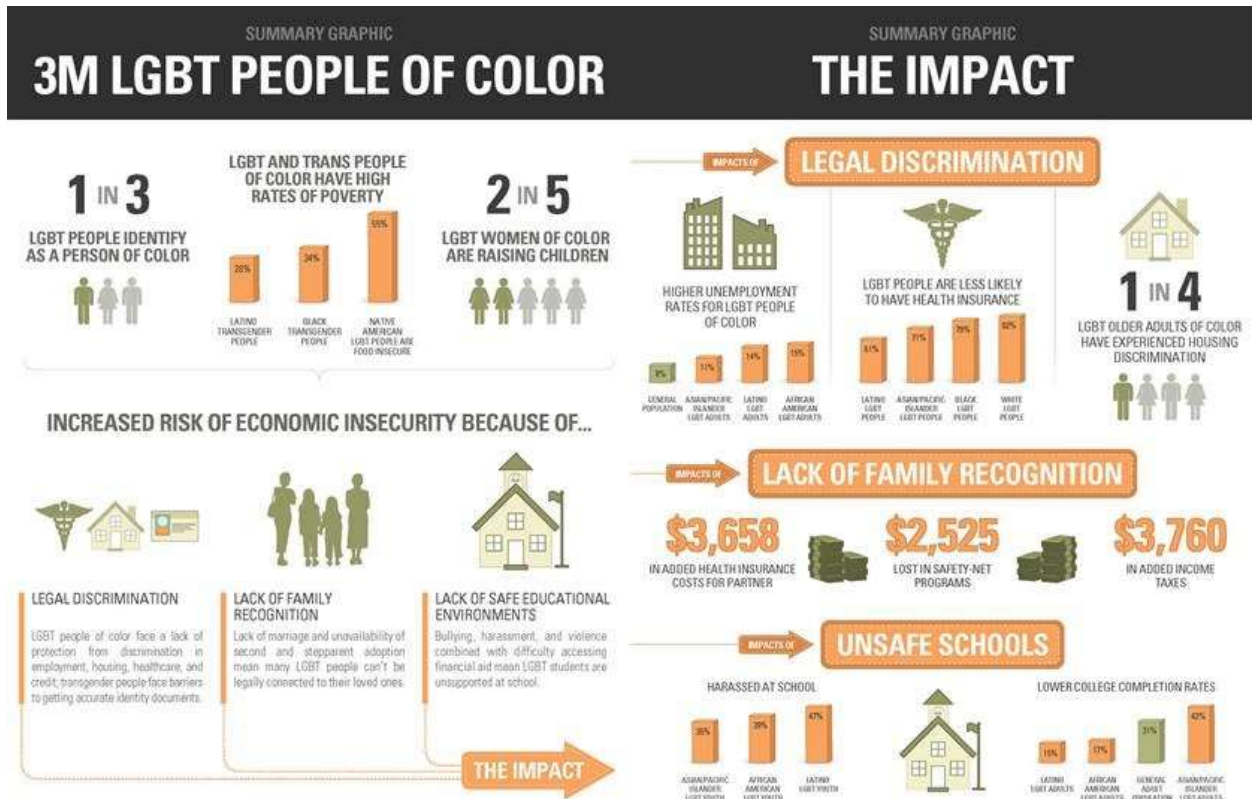
INTERACTING WITH POLICE



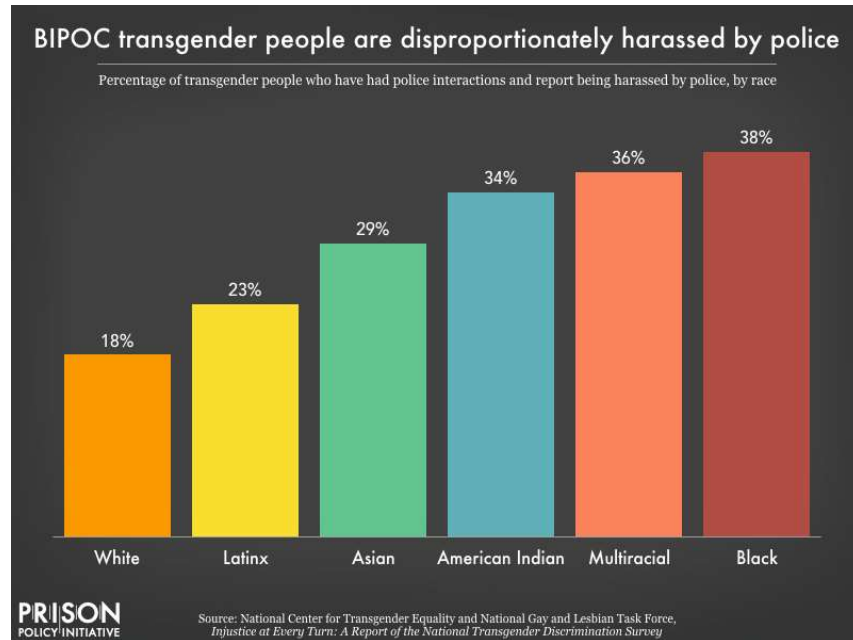
Source: NPR/Robert Wood Johnson Foundation/Harvard T.H. Chan School of Public Health: "Discrimination in America: Experiences and Views of LGBTQ Americans." Survey of 489 U.S. adults conducted Jan. 26-April 9, 2017. The margin of error for the full LGBTQ sample is +/- 6.6 percentage points. Each question was asked of half of the sample.

Credit: Matthew Zhang/NPR

V. IMPACT OF ANTI-LGBTQ+ DISCRIMINATION, SPECIFICALLY ON LGBTQ+ PEOPLE OF COLOR



According to the National Center for Transgender Equality and the National Gay and Lesbian Task Force's *Injustice at Every Turn: A Report of the National Transgender Discrimination Survey*, nearly 50% of trans people reported that they do not feel comfortable seeking help from police.



VI. GLOSSARY

- **Gender Expression:** The external manifestations of gender, expressed through such things as names, pronouns, clothing, haircuts, behavior, voice, body characteristics, and more.
- **Gender Identity:** One's internal, deeply held sense of gender. Unlike gender expression, gender identity is not visible to others.
- **Sex:** A person's sex is a combination of bodily characteristics including chromosomes, hormones, internal and external reproductive organs, and secondary sex characteristics. This is commonly assigned at birth based on appearance of external genitalia.
- **Sexual Orientation:** The desire one has for emotional, romantic, and/or sexual relationships with others based on their gender expression, gender identity, and/or sex. Many people choose to label their sexual orientation, while others do not.

- Queer: Adjective. In a very basic sense, anyone who is not heterosexual and/or cisgender.
- Transgender: A person whose gender identity does not match the sex assigned to them at birth.
- Cisgender: A person whose gender identity matches the sex they were assigned at birth.
- Nonbinary describes a person whose gender identity does not conform to the gender binary. Not all non-binary people identify as trans.
- Gender Expansive/Genderqueer/Gender Nonconforming describe individuals whose gender identity and/or gender expression expands beyond, actively resists, and/or does not conform to the current cultural or social expectations of gender, particularly in relation to male or female. Not all trans people are gender non-conforming, not all gender non-conforming people are trans.
- Agender describes someone who does not align themselves with any particular gender.

Source: It Gets Better Project LGBTQ+ Glossary, <http://www.itgetsbetter.org/glossary>

VII. READINGS ABOUT THE EXPERIENCES OF TRANS PEOPLE

- Report of the 2022 U.S. Transgender Survey, <http://www.ustranssurvey.org/>
- Understanding Issues Facing LGBT Americans, <http://www.lgbtmap.org/file/understanding-issues-facing-lgbt-americans.pdf>
- “Paying an Unfair Price: The Financial Penalty for Being Transgender in America,” <https://www.lgbtmap.org/file/paying-an-unfair-price-transgender.pdf>
- “The Staggering Costs of Being Transgender in the US,” <https://www.businessinsider.com/transgender-medical-care-surgery-expensive-2019-6>
- “How Much Does It Cost to Medically Transition?” <https://www.out.com/out-exclusives/2019/8/02/how-much-does-it-cost-medically-transition>

VIII. ADDITIONAL RESOURCES

- GLSEN: <https://www.glsen.org/research-list?program=All&type=All&issue=All&topic=All&grade=All>
- It Gets Better Project: <https://itgetsbetter.org/education/>
- Trans Student Educational Resources: <https://transstudent.org/>
- Advocates for Transgender Equality: www.transequality.org
- The Transgender Law Center: www.transgenderlawcenter.org
- Sylvia Rivera Law Project: www.srlp.org
- TGI Justice Project: www.tgijp.org
- InterAct Advocates for Intersex Youth: <https://interactadvocates.org>