SOGI Data Collection Resource Guide

> **i** *This guide provides guidance and decision support to caregivers when collecting SOGI patient information*

Collecting Patient Pronouns

> **i** *Pronouns are words used to refer to a person without using their name. Common pronouns include he/him/his, she/her/hers, and they/them/theirs.*

Tell the patient: My pronouns are [insert your pronouns here]. What are your pronouns?

- Use the pronoun comment field to enter pronouns not listed in the form.

Collecting Patient Preferred Name

> **i** *A preferred name is a patient name commonly used that is different from their legal name. If a patient goes by a name other than their legal one, record the name so that staff members interacting with the patient see what the patient wants to be called. The patient's preferred name will appear on all patient documentation. The patient's legal name still appears on guarantor accounts and coverages, and both names appear in patient identification clinical workflows.*

Ask the patient: Do you use a different name than your legal name that I should refer to you by?

Collecting Gender Identity

> **i** *A person's innate sense of self as a man, a woman, non-binary, agender, etc.*

Ask the Patient: Which of the following best describes your gender identity?

- Male: Select for patient who reports they identify themselves as a man/male.
- Female: Select for patient who reports they identify themselves as a woman/female.
- Agender: Select for patient who reports they do not identify themselves with any gender.
- Demiboy: **Select for patient who reports they identify as a boy/man and/or with masculinity partially to varying degrees, but not wholly as a boy/man and/or masculine. Demiman is a related term.**
- Demigirl: Select for patient who report they identify as a girl/woman and/or with femininity partially to varying degrees, but not wholly as a girl/woman and/or feminine; Demiwoman is a related term.
- Genderqueer: Select for patient who report this gender identity that exists outside traditional gender roles/cultural norms; Genderqueer individuals may identify as both genderqueer and other gender identities or solely as genderqueer.
- Gender Fluid: Select for patient who report they identify with no fixed gender. A person who shifts between genders.
- Nonbinary: Select for patient who report they do not identify themselves as either man or woman.

- o Two Spirit: Select for patient who reports they identify with third gender found in some Native American cultures.
- o Transgender Man/Transgender Male/Transmasculine: Select when a patient reports their gender identity as man/male but who was assigned female sex at birth.
- o Transgender Woman/Transgender Female/Transfeminine: Select when a patient reports their gender identity as woman/female but who was assigned male sex at birth.
- o Other: Select for patients who do not think that one of the above categories adequately describes them. Use this option for patients who identify themselves with more than one gender identity description. A free text box will appear where you can record the patient's gender identity.
- o Chose Not to Disclose: Select for patient who chose not to disclose their gender.
- o Unknown: Select when caregiver is unable to collect the patients gender identity.

Collecting Sexual Orientation

> ℹ️ *Sexual orientation is how an individual describes their emotional and sexual attraction to others.*

Tell the patient: To make sure all patients get the best possible care; we would like you to tell us about your sexuality. Your answers are confidential, and only visible to those with access to your medical record.

Ask the patient: Which of the following best describes your sexuality? You can choose more than one answer.

- o Heterosexual (or straight): Select for patient who reports they identify themselves as emotionally and sexually attracted to people of a different gender.
- o Bisexual: Select for patient who reports they identify themselves as emotionally and sexually attracted to people of their own gender and people of other genders or more than two genders.
- o Asexual: Select for patient who reports they experience little to no sexual attraction to others: Not to be equated with celibacy.
- o Pansexual: Select for patient who reports they identify themselves as emotionally and physically attracted to people regardless of gender.
- o Queer: Select for patient who reports they identify themselves as queer, which is defined as a sexual orientation outside social norms that is more fluid and inclusive. **An umbrella term used to describe LGBTQIA+ sexual orientation, gender identity and/or gender expressions. The word queer has been and still is used as a derogatory term or slur, and while it has been proudly reclaimed by many in the LGBTQIA+ community, others see the term as offensive.**
- o Lesbian: Select for patient who reports they identify as a woman/femme person who is sexually attracted to other women/feminine people.
- o Gay: Select for patient who reports they identify as a man/masculine person who is sexually attracted to other men/masculine people.
- o Chose Not to Disclose: Select when patient chooses not to disclose their sexual orientation.
- o Other: Select for patients who do not think that one of the above categories adequately describes their sexual orientation. Use this option for patients who identify themselves with more than one sexual orientation description. A free text box will appear where you can record the patient's sexual orientation.
- o Don't know: Select when patient reports that they do not know their sexual orientation.

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o   Unknown: Select when caregiver is unable to collect the patient's sexual orientation.

Collecting Sex Assigned at Birth

> ℹ️ *Sex assigned at birth or sex reported on birth certificate refers to a person's "physical attributes (genitalia, chromosomes, secondary sex characteristics) used to categorize them as male, female, or intersex. It is understood as a biological construct, referring to the genetic, hormonal, anatomical, and psychological characteristics of males, females, or intersex individuals. Intersex is used to describe individuals born with natural variations in their sex characteristics that do not fall into strictly binary measures of male or female.*

Ask the patient: Which of the following best describes the sex that you were assigned at birth? This is the sex that someone observed when you were born, and likely was on your original birth certificate.

- o   Male: Select when sex assigned at birth or sex reported on their birth certificate was male.
- o   Female: Select when sex assigned at birth or sex reported on their birth certificate was female.
- o   Unknown: Select when an adult patient does not know what sex they were assigned at birth or are not able to communicate a response to the caregiver asking the questions. This option would <u>not</u> be used for a newborn encounter because the sex assigned at birth happens during that encounter.
- o   Uncertain: Select when a patient with intersex features whose sex was documented as uncertain on birth certificate.
- o   Not Recorded on Birth Certificate: Select when the patient reports that no sex assigned at birth was documented on birth certificate.
- o   Chose Not to Disclose**:** Select for patients who choose not to disclose their sex assigned at birth.

Collecting Affirmation Steps

Ask appropriate patients: Would you like to share whether you have taken any of the listed steps to affirm your gender identity?

> ℹ️ *A term meaning the period when a transgender person or gender diverse person is taking steps, medically and/or socially, to live as a member of a gender different from the individual's birth-assigned gender. Some people use this term to describe the medical process they are undergoing until they have completed the medical procedures that are relevant for them to present as their gender. Also referred to as transition or transitioning*

Organ Inventory

> ℹ️ *Complete and accurate organ inventory history assists caregivers in making accurate clinical decisions.*

Sex

> ℹ️ *Legal sex is a reference of sex as a matter of law. Examples of a legal documents that include an assigned sex are birth certificates, driver's license, or passport. This information is collected in Demographics and not in SOGI Smartform. The value is displayed as either [sex] or [legal/administrative sex] in Epic.*

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