Disclaimer

Disclosures

I have no conflicts of interests or commercial relationships to disclose.

Land Acknowledgement

I would like to take a moment to recognize the unceded ancestral lands of the first people. Specifically, we honor the Očhéthi Šakówiŋ (meaning Seven Council Fires, which is the proper name for the people referred to as Sioux), the hinono'eino' biito'owu' (Arapaho), Ndé Kónitsąąíí Gokíyaa (Lipan Apache), and Tséstho'e (Cheyenne) people.

We pay respects to their elders past and present. Please take a moment to consider the many legacies of violence, displacement, migration, and settlement that bring us together here today.

Infectious diseases do not discriminate. As part of our response to the HIV epidemic, we must elevate those groups who have been historically marginalized in our communities. It is our responsibility to listen, recognize, and bring their experiences to the forefront.

To find the ancestral land for your community, please reference: https://native-land.ca/
https://www.sdstate.edu/wokini-initiative/land-acknowledgement#:~:text=South%20Dakota%20State%20University%20acknowledges,people%20referred%20to%20as%20Sioux

Objectives & Roadmap

- Address LGBTQ+ stigma within your healthcare practice to improve patient outcomes

- Integrate inclusive practices into the clinical setting

- Utilize patient first language and pronouns to respect the diversity of lived experience

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REFRESH!

Vanessa Goes to the Doctor

The SIMEO Model: sex, identity, modality, expression, orientation

Sex
- Female
- Male
- Intersex

Gender Identity
- Woman
- Man
- Nonbinary
- Genderqueer

Gender Modality
- Transgender
- Cisgender
- Exploring

Gender Expression
- Feminine/ femme
- Masculine/ masc / butch
- Androgynous

Sexual Orientation
- Heterosexual
- Lesbian
- Gay
- Bisexual
- Queer
- Asexual
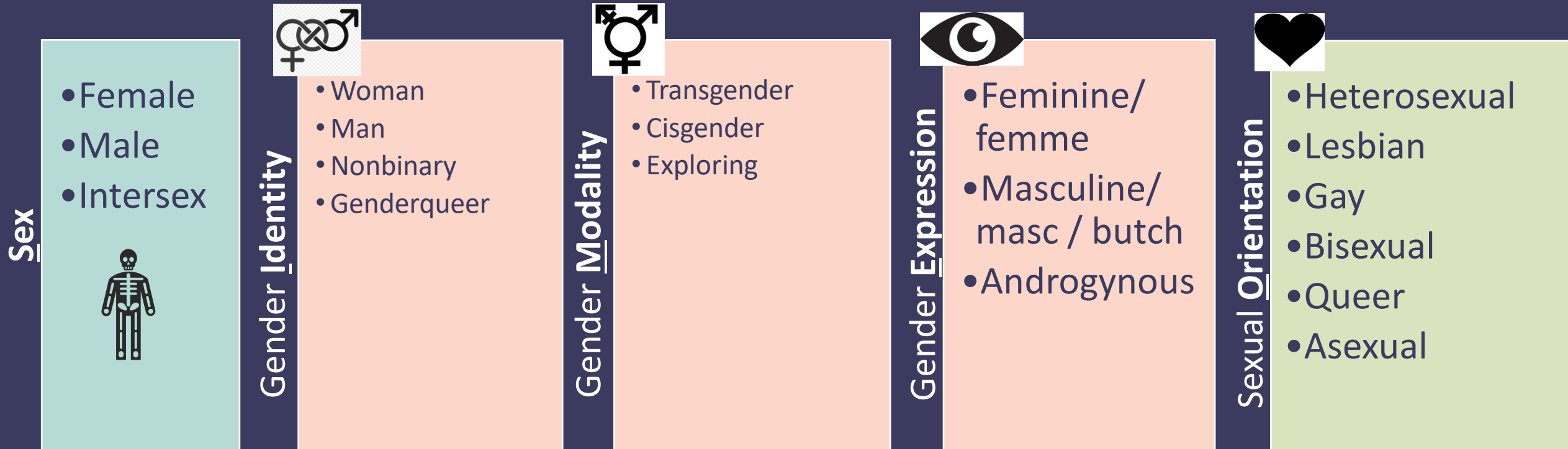
This is not an exhaustive list! Many additional identity labels exist.

Explaining Sex vs. Gender

Sex

A person's reproductive biology that is typically categorized into "male" and "female," and sometimes "intersex"

May include:
- Reproductive organs
- Genitals
- Hormones and hormone receptors
- Chromosomes

Sex is socially constructed. Humans decide who fits into what category. Sex assigned at birth is based on external anatomy.

Gender

A person's gender affects how they interact with the world, often based on socially constructed roles and expectations

May include:
- Identity (who I am/how I see myself)
- Modality (have I transitioned in gender)
- Expression (how I present)
- Attribution (how people see me)

Gender is socially constructed. Each culture/society has its own options for gender identities and expectations that accompany them.

Oregon Health Authority

END HIV

AETC AIDS Education & Training Center Program
Mountain West

Oregon SOGI Recommendations

Figure 1. Required Demographic Questions

1. Please describe your gender in any way you prefer:
_____

2. What is your gender? (check all that apply)
☐ Girl, Woman ☐ Boy, Man ☐ Non-binary ☐ Agender/No gender ☐ Questioning
☐ Not listed. Please specify: _____ ☐ Don't know
☐ I don't know what this question is asking[1] ☐ I don't want to answer

3. Are you transgender?
☐ Yes ☐ No ☐ Don't know
☐ I don't know what this question is asking ☐ I don't want to answer

4. Please describe your sexual orientation or sexual identity in any way you want:
_____

5. How do you describe your sexual orientation or sexual identity? (check all that apply)
☐ Same-gender loving ☐ Same-sex loving ☐ Lesbian ☐ Gay ☐ Bisexual
☐ Pansexual ☐ Straight (attracted mainly to or only to other gender(s) or sex(s))
☐ Asexual ☐ Queer ☐ Questioning ☐ Don't know
☐ Not listed. Please specify: _____
☐ I don't know what this question is asking ☐ I don't want to answer

https://www.oregon.gov/oha/EI/REALD%20Documents/DRAFT-SOGI-Recommendations.pdf

What makes an environment inclusive?

Creating LGBTQ+ Inclusive Environments

- **Staff Training**
  - Ensure ALL staff are trained in using inclusive language
  - Patients interact with lots of people when they come into your practice: scheduling on the phone, front desk staff, nurses, providers
  - These are all opportunities to make someone feel seen and affirmed and help ensure they'll come back for another appointment!

- **Visual cues**
  - "All are welcome here" signage, inclusive imagery, rainbow flags
  - Materials and brochures from community partners and with information specific to LGBTQ+ health needs
  - Visibly post a "nondiscrimination" statement

- **Using neutral language**
  - Instead of asking about mother/father, ask about parents
  - Use the gender neutral "THEY" or someone's name when you don't know a person's pronoun

- **Creating an environment that allows for identity to change over time**
  - Asking identity information on a regular basis
  - Utilizing workflows so names/pronouns are communicated across the team

- **Creating inclusive intake forms**

https://www.lgbtqiahealtheducation.org/wp-content/uploads/2021/05/Ten-Strategies-for-Creating-Inclusive-Health-Care-Environments-for-LGBTQIA-People-Brief.pdf

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VISUAL CUES

Clinic Walkthrough
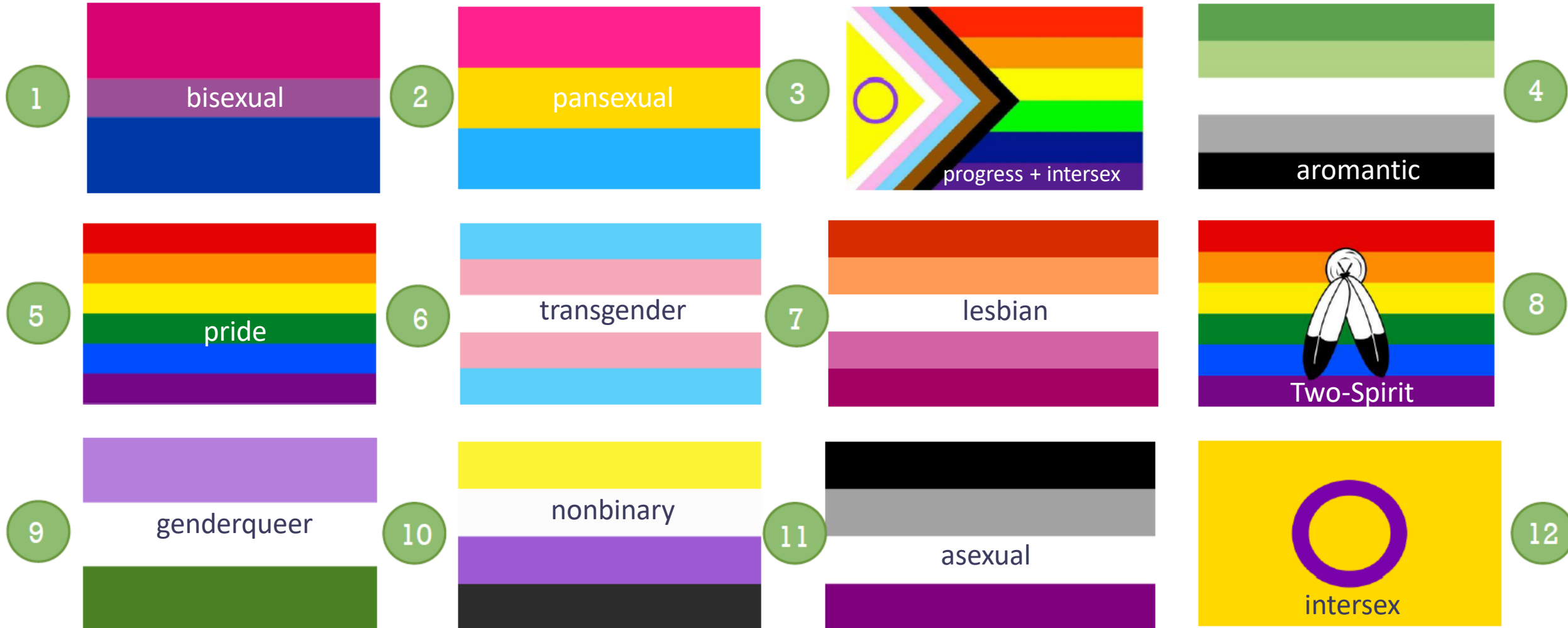
Clinic Walkthrough

Clinic Walkthrough

- What did you notice?

- What messages might a patient receive walking through the space?

- Where do you see opportunities to make the space more welcoming and inclusive?

What flags do you know?

1. bisexual
2. pansexual
3. progress + intersex
4. aromantic
5. pride
6. transgender
7. lesbian
8. Two-Spirit
9. genderqueer
10. nonbinary
11. asexual
12. intersex

USING NAMES AND PRONOUNS

Why are pronouns important?

Pronouns Expanded

Common neopronouns, with the singular 'they' included for reference, and examples of how they are used

	Subject Pronouns	Object Pronouns	Possessive Adjectives	Possessive Pronouns	Reflexive Pronouns
They	*They* laughed	I called *them*	*Their* eyes gleam	That is *theirs*	They like *themselves*
Ne	*Ne* laughed	I called *nem*	*Nir* eyes gleam	That is *nirs*	Ne likes *nemself*
Ve	*Ve* laughed	I called *ver*	*Vis* eyes gleam	That is *vis*	Ve likes *verself*
Spivak	*Ey* laughed	I called *em*	*Eir* eyes gleam	That is *eirs*	Ey likes *emself*
Ze/Zie and Hir	*Ze* laughed	I called *hir*	*Hir* eyes gleam	That is *hirs*	Ze likes *hirself*
Ze/Zie and Zir	*Ze* laughed	I called *zir*	*Zir* eyes gleam	That is *zirs*	Ze likes *zirself*
Xe	*Xe* laughed	I called *xem*	*Xyr* eyes gleam	That is *xyrs*	Xe likes *xemself*

https://en.wikipedia.org/wiki/Spivak_pronoun
https://intercultural.uncg.edu/wp-content/uploads/Neopronouns-Explained-UNCG-Intercultural-Engagement.pdf

Pronoun Practice

- Get into pairs

- Take 2 minutes to tell your partner about someone in your life, using only they/them pronouns.

- After you're done, swap!

- If you feel comfortable with they/them pronouns already, try some other pronouns
  - Ze/Zir
  - Xe/Xem
  - Only using the person's name

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Using Identity Terms

- It is important to listen to, understand, and mirror the terms that patients use to describe themselves

- Keep in mind that some people do not like to use any terms to describe their gender identity

- Some people may not use a personal pronoun. As appropriate, use the person's name or chosen identifier

- People may have different ways they identify in different settings, e.g., work vs personal life

www.lgbtqiahealtheducation.org

Using Names and Pronouns

- If you are unsure about a client's name or personal pronouns:
  - *"I would like be respectful—what name and pronouns would you like me to use?"*

- If a client's name doesn't match insurance or medical records:
  - *"Could your chart/insurance be under a different name?"*
  - *"What is the name on your insurance?"*

- If you accidentally use the wrong term or pronoun, and you catch yourself:
  - Quickly apologize and correct yourself. *"He- I'm sorry, she…"*

- If you accidentally use the wrong term or pronoun, and the person corrects you:
  - *"Thank you for correcting me. I'll make a note, so I get it right next time."*
    - Make sure you do make the note!

Video: Finding a patient who is in your system under a different name

National LGBT Health Education Center — A Program of the Fenway Institute

Registration Staff

Example of a negative and positive interaction:
Helping a transgender patient who has changed her name.

ASKING THE QUESTIONS

VIA FORMS

In one word, why is it important to ask patients about sexual orientation and gender identity?

Principles of SOGI Data Collection

- Create inclusive and welcoming environments

- Recognize the true diversity of people

- Support health equity efforts

- Direct people to group-specific services

- Shift social norms about who is expected to be a person

Gathering Data
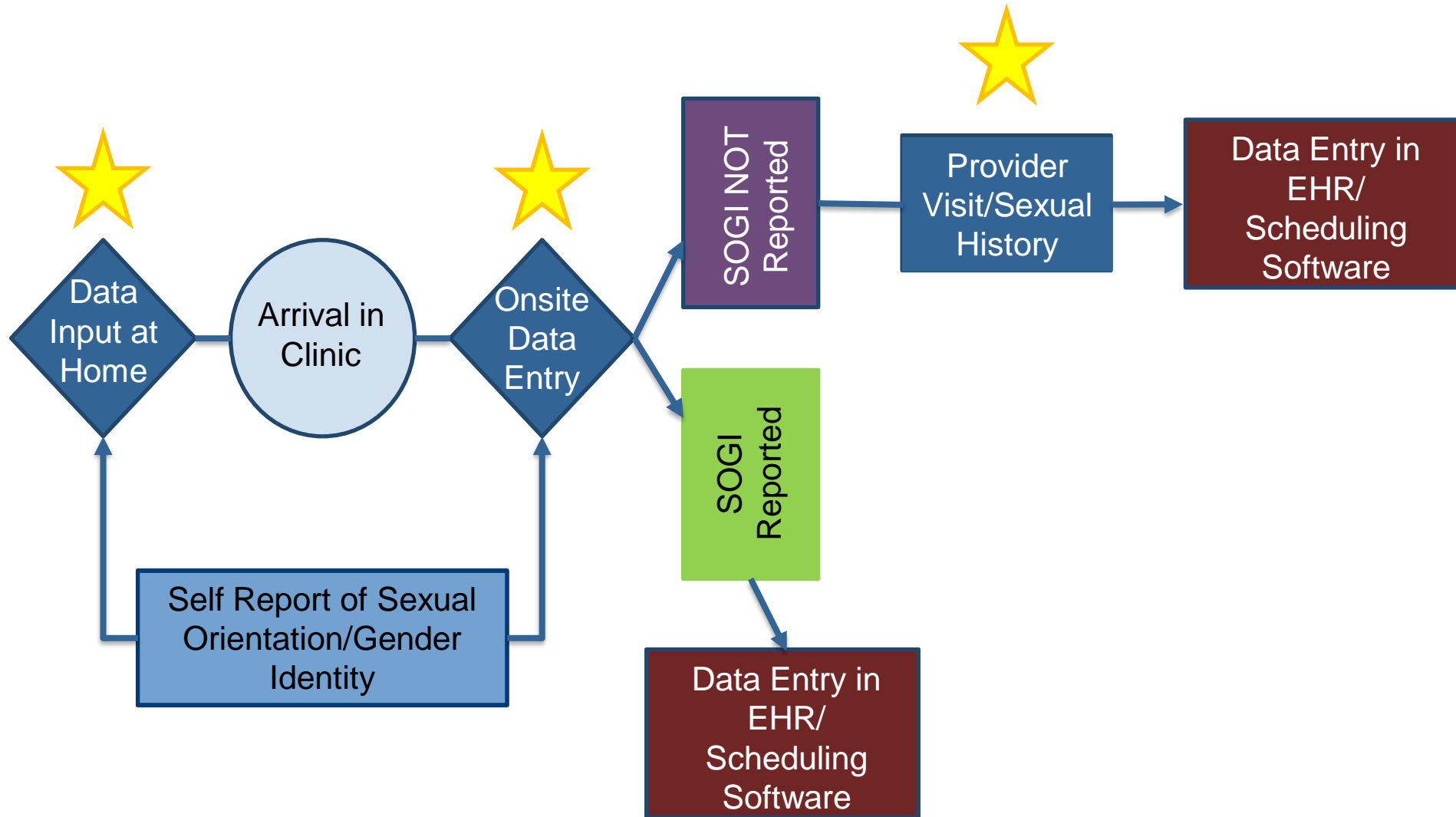
Sample Form

MR#_____

Patient Demographic Form

CLIENT INFORMATION

Name:_____ SSN:_____
　　　　　Last　　　　　　　　　First　　　　　　　　　Middle

Other Name(s) Used: _____ Last Name at Birth: _____

Birthdate: _____ ❏ Female ❏ Male ❏ Female to Male ❏ Male to Female ❏ Non- binary ❏ Declined

Street Address: _____ City: _____ State: _____ Zip: _____

Mailing Address (If different from Above): _____ City: _____State: _____ Zip: _____

Please provide us with at least two contact phone numbers and tell us what kind of phone numbers they are:

(_____)_____ ❏ Home ❏ Work ❏ Cell Phone ❏ Message

(_____)_____ ❏ Home ❏ Work ❏ Cell Phone ❏ Message

Do we need to contact you at a different mailing address, phone or through an alternate method for confidential issues? ❏ Yes ❏ No

Do you need an interpreter? ❏ Yes ❏ No　　What is your primary language? _____

Which of the following best describes you:

Race – Mark all that apply:　　❏ Alaskan Native　　❏ American Native　　❏ Asian　　　　　**Ethnicity** ❏ Hispanic

　　　　　　　　　　　　　　　　❏ Native Hawaiian　　❏ Pacific Islander　　❏ White ❏ Black　　　　　❏ Non-Hispanic

MR#_____

Spot for name other than legal name

Could include way to select which name patient wants to go by

Could include space for pronouns

Does not assume patient has a maiden name

CLIENT INFORMAT

Name:_____ SSN:_____
       Last   First   Middle

Other Name(s) Used: _____ Last Name at Birth:_____

Birthdate: _____ ☐ Female ☐ Male ☐ Female to Male ☐ Male to Female ☐ Non-binary ☐ Declin

Street Address: _____ City:_____ State: _____ Zip: _____

Mailing Address (If different from Above)_____ City: _____ State: _____

Please provide us with at least two con_____ d of p_____

(____)_____ ☐ Home

(____)_____ ☐ Home

Do we need to contact you at a different mailing address, phone or through an_____ **ues?** ☐ Yes ☐ No

Do you need an interpreter? ☐ Yes ☐ No   What is your primary language? _____

Which of the following best describes you:

Race – Mark all that apply: ☐ Alaskan Native   ☐ American Native   ☐ Asian   **Ethnicity** ☐ Hispanic

☐ Native Hawaiian   ☐ Pacific Islander   ☐ White   ☐ Black   ☐ Non-Hispanic

"Female" and "male" are sex terms. Could include "sex assigned at birth," and ask about gender identity separately

"FTM" and "MTF" are no longer commonly used. Better to use terms like "transgender man" and "transgender woman"

Includes transgender and nonbinary gender options

Sample Form

4. Ethnicity
- ☐ Hispanic/Latino/Latina/Latinx
- ☐ Not Hispanic/Latino/Latina Latinx

5. Country of Birth
- ☐ USA
- ☐ Other: _____

6. Preferred Language
(choose one)
- ☐ English
- ☐ Español
- ☐ Français
- ☐ Português
- ☐ Русский
- ☐ Other: _____

7. Sexual Orientation
- ☐ Lesbian
- ☐ Gay
- ☐ Straight or heterosexual
- ☐ Bisexual
- ☐ Another orientation: _____
- ☐ Don't know/not sure

8. Marital Status
- ☐ Married
- ☐ Partnered
- ☐ Single
- ☐ Divorced
- ☐ Other _____
- ☐ Don't know/not sure

9. Veteran Status
- ☐ Veteran
- ☐ Not a Veteran

10. Referral Source
- ☐ Self
- ☐ Friend or Family Member
- ☐ Health Provider
- ☐ Emergency Room
- ☐ Ad/Internet/Media/Outreach Worker/School
- ☐ Other: _____

11. How would you best describe your gender?
- ☐ Female/Woman
- ☐ Male/Man
- ☐ Trans woman or Transfeminine
- ☐ Trans man or Transmasculine
- ☐ Nonbinary, genderqueer, or not exclusively male or female
- ☐ Another gender: _____

12. What sex* was listed on your first birth certificate?
*We are currently testing the best ways for us to capture additional sexes. We know this question does not currently fully represent our communities.
- ☐ Female
- ☐ Male

13. Do you identify as trans, transgender, transsexual, or as having a trans history?
- ☐ Yes
- ☐ No
- ☐ Don't know / Not sure

https://access.fenwayhealth.org/pdf/New_Client_Registration_V15.pdf

Inclusive language is precise language

Sample SOGI Questions

Figure 1. Required Demographic Questions

1. Please describe your gender in any way you prefer:
_____

2. What is your gender? (check all that apply)
☐ Girl, Woman ☐ Boy, Man ☐ Non-binary ☐ Agender/No gender ☐ Questioning
☐ Not listed. Please specify: _____ ☐ Don't know
☐ I don't know what this question is asking[1] ☐ I don't want to answer

3. Are you transgender?
☐ Yes ☐ No ☐ Don't know
☐ I don't know what this question is asking ☐ I don't want to answer

4. Please describe your sexual orientation or sexual identity in any way you want:
_____

5. How do you describe your sexual orientation or sexual identity? (check all that apply)
☐ Same-gender loving ☐ Same-sex loving ☐ Lesbian ☐ Gay ☐ Bisexual
☐ Pansexual ☐ Straight (attracted mainly to or only to other gender(s) or sex(s))
☐ Asexual ☐ Queer ☐ Questioning ☐ Don't know
☐ Not listed. Please specify: _____
☐ I don't know what this question is asking ☐ I don't want to answer

https://www.oregon.gov/oha/EI/REALD%20Documents/DRAFT-SOGI-Recommendations.pdf

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Organ Inventory Questions

Screenshot of University of Pittsburgh Medical Center electronic medical records system, Epic Software.

Sexual Behavior Questions

SEXUAL HEALTH

1. Are you sexually active? Yes☐ No ☐
   If No, have you been sexually active in the past year? Yes☐ No ☐

2. If yes to question 7: Are your sexual partners (Check all that apply):

   ☐ A person with a penis
   ☐ A person with a vagina
   ☐ A person with intersex genitalia
   ☐ A person who had genital reassignment surgery

   ☐ Don't know
   ☐ I don't know what this question is asking
   ☐ I don't want to say

Forms: Things to Consider

- Does your form make anyone who does not identify as cisgender/heterosexual feel comfortable and welcome at your clinic?

- Does your form collect information in a way that matches EHR fields?
  - If not, is there a reason why?

- How is information from forms shared across the team?

- It's okay to have blank fields. Not everyone wants to disclose identity information on their medical record.

Inclusive Forms

Avoid ...	Replace with...
Mother/Father	Parent/Guardian
Husband/Wife	Spouse/Partner(s)
Marital Status	Relationship Status
Family History	Blood Relatives
Nursing Mother	Currently Nursing
Female Only/Male Only	Allow patients to choose *not applicable*.

Focus on Forms and Policy:
Creating an Inclusive Environment for LGBT Patients
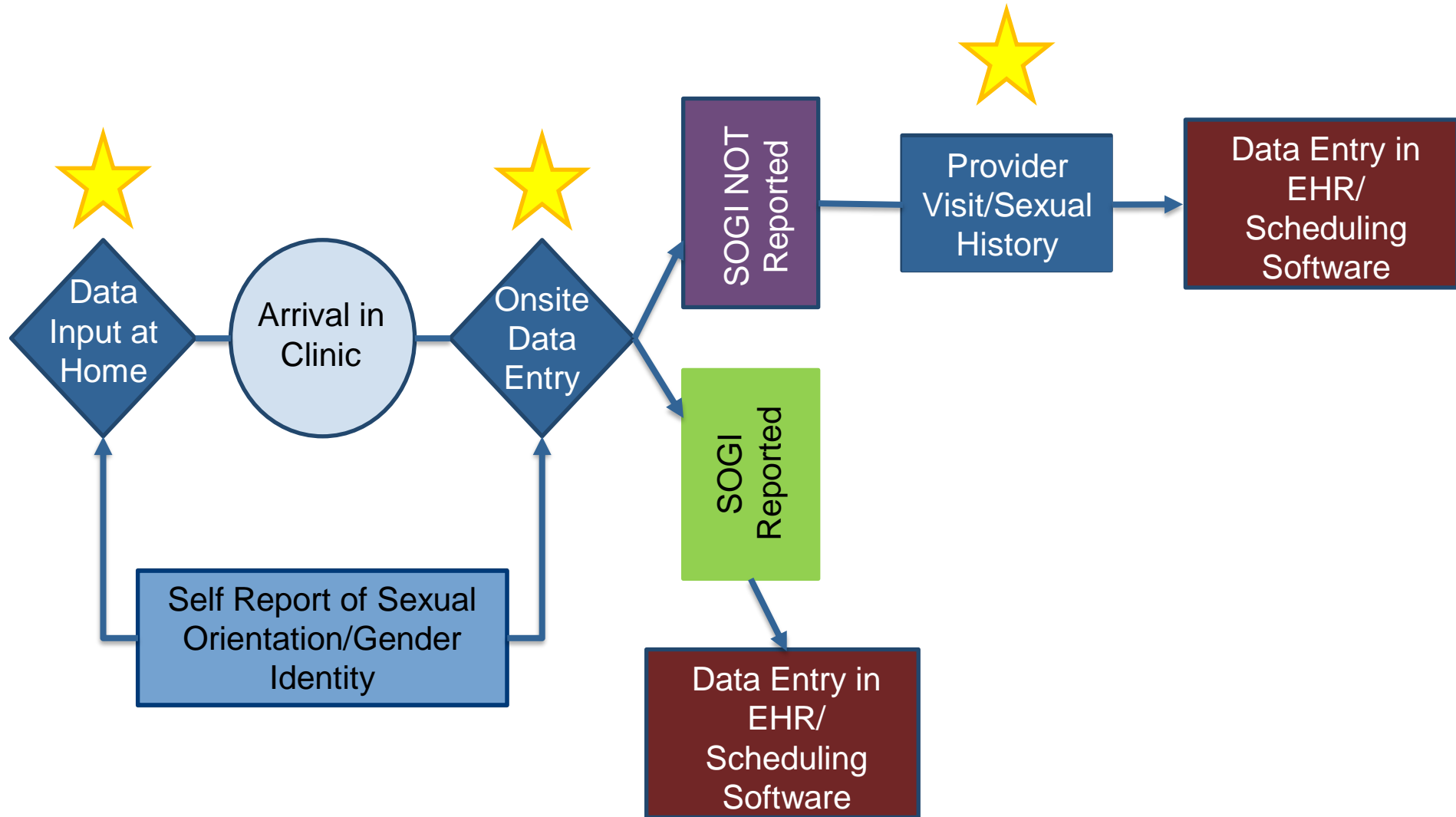
NATIONAL LGBT HEALTH EDUCATION CENTER

ADVANCING EXCELLENCE IN SEXUAL AND GENDER MINORITY HEALTH TRAIN-THE-TRAINER COURSE

https://www.lgbtqiahealtheducation.org/publication/focus-forms-policy-creating-inclusive-environment-lgbt-patients/

ASKING THE QUESTIONS

IN PERSON

Gathering Data

Ask the question in a routine way

We ask everyone about their gender, transgender status, sex, sexual orientation and current sexual partners. We do so to ensure everyone receives the highest quality of care.

Guidelines about answers to questions
- Respect their answers, including their own language (or choices if you provide categories).
- Allow people to answer, and to use as much of their own language as possible.
- Use common sense.
- Refrain from communicating judgment, including about discomfort, refusals, or question.
- If a person does not want to answer these questions, move on.

AVOID making the focus of the interaction
- "I'm asking you these questions because the government says I have to." (This is a standard of care.)
- "This will help us hire staff to better meet your needs." (This is not done for some financial incentive.)
- Your own discomfort

Focus the motivation for the interaction on
- "This will help us make sure that everyone receives the highest quality of care (or services)"
- The values statement

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Practice Asking the Questions

Figure 1. Required Demographic Questions

1. Please describe your gender in any way you prefer:
_____

2. What is your gender? (check all that apply)
☐ Girl, Woman ☐ Boy, Man ☐ Non-binary ☐ Agender/No gender ☐ Questioning
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5. How do you describe your sexual orientation or sexual identity? (check all that apply)
☐ Same-gender loving ☐ Same-sex loving ☐ Lesbian ☐ Gay ☐ Bisexual
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☐ I don't know what this question is asking ☐ I don't want to answer

https://www.oregon.gov/oha/EI/REALD%20Documents/DRAFT-SOGI-Recommendations.pdf

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Why are you asking/how do I answer this?

Suggested Response	Rationale
These questions help us identify what healthcare needs you may have. We ask these questions of everyone. You may always decline to answer or talk about it more with the provider.	People may not understand why the information is being collected. The suggested response may help them understand how the data will be used to improve quality of care overall.
I can't tell you how to answer the question. You should answer however you are most comfortable answering or however you identify. If you are uncomfortable answering the question, you may decline to answer. You can also talk more about it with your provider.	You should not make assumptions about the "correct" answer for any patient. Suggesting they talk about it more with the provider will give them the opportunity to explore the question in the privacy of the exam room.

You can also ask the patient if there is anything about the question you can clarify for them.

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Can't you tell by looking at me?

Suggested Response	Rationale
We don't want to assume anything about how people identify or how they want to describe themselves. If you don't identify with any of the choices, you can choose "Not Listed" or "Decline to Answer". People's identity can change over time. We ask these questions routinely to make sure we treat all people with respect throughout their lives.	Reiterating that everyone is asked these questions periodically will assure the patient you are not making assumptions about them based on their appearance.

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I'm offended…

Suggested Response	Rationale
I hear your concerns about these questions. You are welcome to decline. We ask these questions of everybody to help ensure everyone has access to services to meet their needs. Anything you do share with us is private and confidential.	Patients may find these questions intrusive or too personal. Patients may have fears about their information being used to target them in some way. The suggested response may help ease their mind.

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Activated Emotions

The participant's responses indicate the person is triggered by the questions (e.g., becoming emotional). *Acknowledge their feelings* or experiences, then *refocus on what is happening* in the here and now. Also, you can *shift to factual questions* or take a break. Examples of things you might say:

Reflecting on their experience:
- *I see that you're not happy with these questions. Please answer the questions you feel comfortable answering at this time.*
- *I hear you saying these questions are not appropriate. May I offer you some more information?*
- *It sounds like you are getting upset, would you like me to move on to another question.*
- *I am hearing some tension in your voice, would you like to go to a different section. We can always return to these questions later.*

Acknowledge & message: *I think I may have asked a question you're not comfortable with. It's 100% your choice to answer it or not; we ask everyone the same questions.*

Refocus on what is happening: *I understand these question may bring up some questions/concerns for you. I encourage you to discuss your concerns with (x person depending on the type of concern mentioned).*

Shift to less personal questions: Let's move on to some other questions and later we can come back to these questions...

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Collecting SOGI Data From Minors

Collecting Gender Identity Data from Minors

- Collecting SOGI data from minors helps normalize people of any age thinking and communicating about their identities
  - Can give young people language to describe and understand their experiences

- Age appropriate questions
  - Young children (under age 8 or 9): open ended questions about gender, limit check-box style responses
    - "Are you a boy? Are you a girl? Are you both? Are you something else? Does it change?"
    - Be okay with unexpected answers! Collecting SOGI data is as much a health intervention as it is a way to gather useful data.
  - Adolescents (over age 12) can use adult SOGI data collection questions/tools

- Consider who is in the room; children may be reluctant to provide SOGI data if an unaware or unsupportive person (family member, friend, teacher, etc.) are present.

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Collecting Sexual Identity Data from Minors

- While children can become aware of their romantic or sexual orientation from a very young age, it is not recommended to ask about sexual orientation prior to the onset of puberty
  - As a general rule, don't ask about sexual orientation until age 12

- Adolescents (age 12+) can use adult SOGI questionnaire

- Your practice may want to know where a child is in development of romantic or sexual feelings
  - This is not a required part of SOGI data collection, but can be useful to some practices

- Consider who is in the room;

- When collecting data about sexual orientation from minors, use similar privacy protection practices to when you collect information about other sensitive topics such as mental health, substance use, sexual behavior, etc.

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Collecting SOGI data from parents/caregivers of minors

- Parents/caregivers can only reliably report on assigned gender, observed behaviors, and what their child has told them.
  - Parent report data is less reliable than data collected directly from the minor

- For young children: "what should we know about your child's gender?"

- Parents/caregivers may misrepresent their child's SOGI data for a host of reasons
  - Fear for child's safety
  - Unaware
  - Unsupportive

- Use similar privacy protection protocols to discussing a minor's sexual behavior, substance use, or mental health.

- When collecting data, we should have a way to indicate from whom the data is collected

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Tool to indicate who data was collected from

Collected on a form

Q1.1: Who is filling out this form?
- ☐ The Patient/Subject
- ☐ A Parent/Caregiver
- ☐ Not Listed (please specify): _____

If Patient/Subject, go to Q2
If Parent/Caregiver or Not listed, go to Q3
If form is filled out online, Q1 coded as "Online," Q 1.1 included in form.

Q2: Who was present with the patient/subject when the data was reported?
- ☐ Patient/Subject was alone
- ☐ Parent/Caregiver
- ☐ Not listed (please specify):_____
- ☐ Unknown

Q3: Was the patient/subject present when the data was reported?
- ☐ Yes
- ☐ No
- ☐ Unknown

Collected in person (by clinical staff or interviewer)

Q1: Data reported by
- ☐ Patient/Subject
- ☐ Parent/Caregiver
- ☐ Not listed (please specify):_____
- ☐ Unknown

If Patient/Subject, go to Q2
If Parent/Caregiver or Not listed, go to Q3
If form is filled out online, Q1 coded as "Online," Q 1.1 included in form.

Q2: Who was present with the patient/subject when the data was reported?
- ☐ Patient/Subject was alone
- ☐ Parent/Caregiver
- ☐ Not listed (please specify):_____
- ☐ Unknown

Q3: Was the patient/subject present when the data was reported?
- ☐ Yes
- ☐ No
- ☐ Unknown

Video: From the front desk to the provider

https://www.lgbtqiahealtheducation.org/courses/so-gi-data-collection-training/

Final Thoughts

Avoiding Assumptions

A key principle of effective communication is to avoid making assumptions:

- <u>Don't assume </u>you know a person's gender identity or sexual orientation based on how they look or sound
- <u>Don't assume </u>you know how a person wants to describe themselves or their partners
- <u>Don't assume </u>all your clients are heterosexual and cisgender (not transgender)
- Be open to broader definitions of family and learn what a person defines as positive supports in their lives.

www.lgbthealtheducation.org

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Things to Remember…

- Living as one's authentic self is important to well being

- When something is asked in a routine way, people are more likely to respond

- Don't make assumptions, always ask with respect

- Remember that people may not want SOGI information recorded

- The goal is to create inclusive environments of respect and use data to improve health outcomes

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This is a Journey

- This is a journey both for us as individuals, and the systems in which we work

- Data collection is one piece of achieving health equity
  - Building inclusive environments
  - Addressing bias and stigma
  - Updating policies, practices, and procedures to support all people

Thank you!

DAYNA MORRISON, OREGON AETC: DAYNA@ORAETC.ORG

VIEW MORE SOGI RESOURCES AT ORAETC.ORG/SOGI

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**TEN STRATEGIES**
for Creating Inclusive Health Care Environments for LGBTQIA+ People

NATIONAL LGBTQIA+ HEALTH EDUCATION CENTER
A PROGRAM OF THE FENWAY INSTITUTE

April 2021

https://www.lgbtqiahealtheducation.org/wp-content/uploads/2021/05/Ten-Strategies-for-Creating-Inclusive-Health-Care-Environments-for-LGBTQIA-People-Brief.pdf

Pronoun Practice

https://www.minus18.org.au/pronouns/
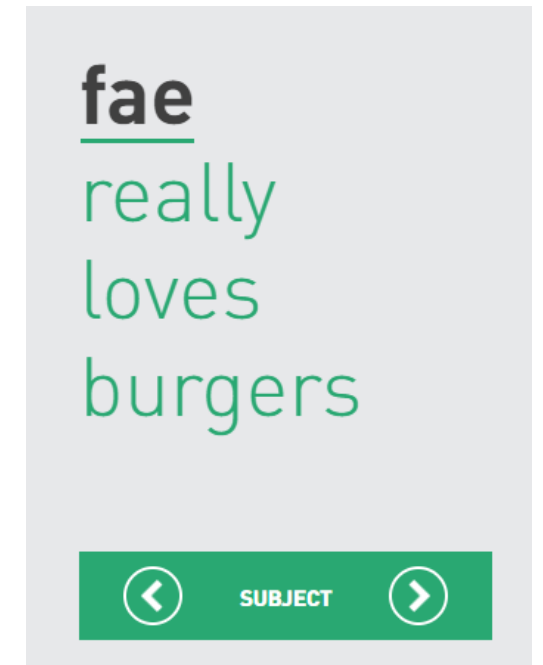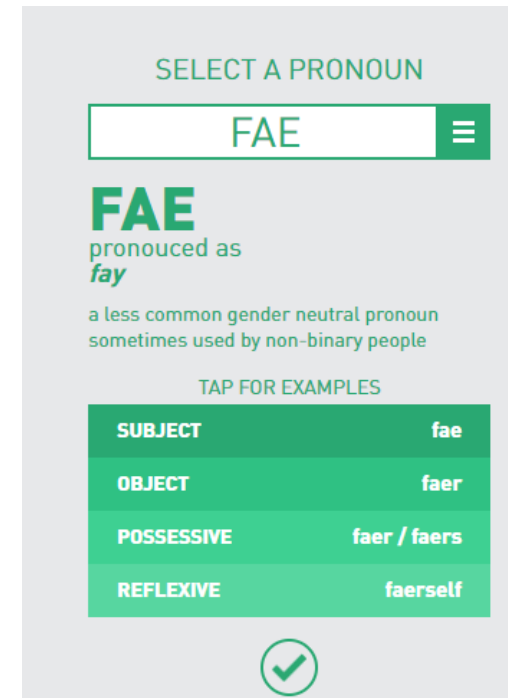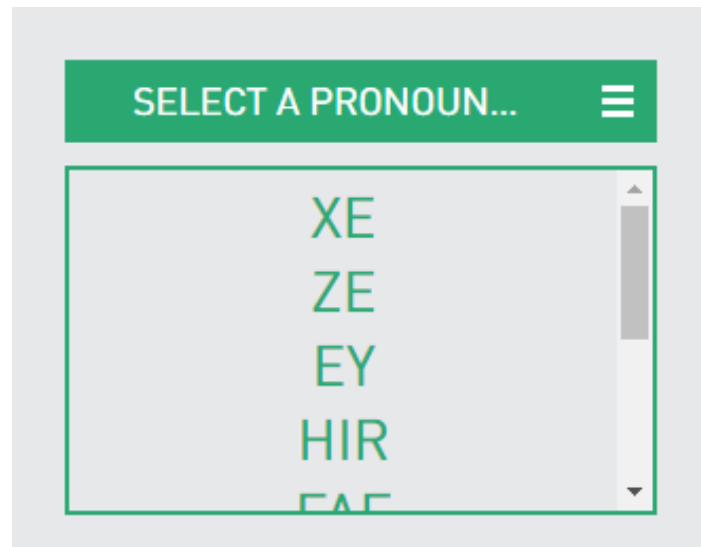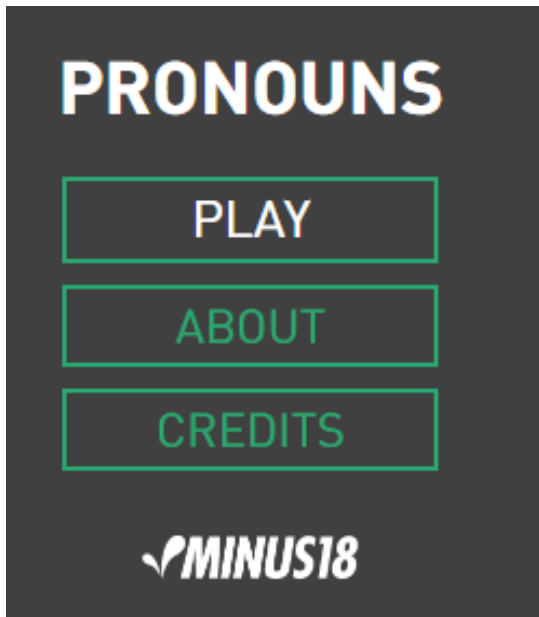
NATIONAL LGBT HEALTH EDUCATION CENTER

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