

# Collecting Sexual Orientation and Gender Identity (SO/GI) Data

## *LGBTQ Health Series 2*

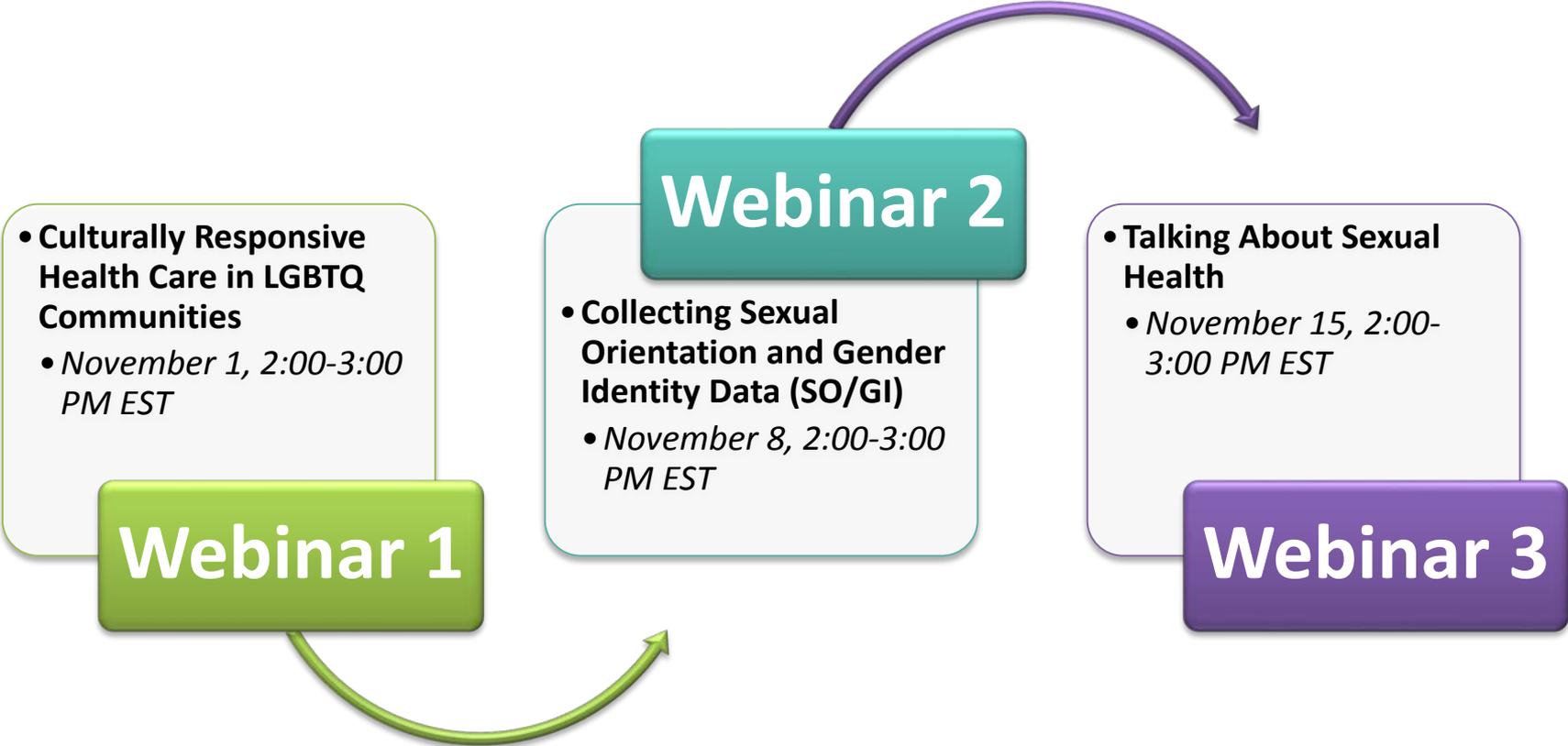
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Primary Care Development Corporation  
HIP in Healthcare Program

# Acknowledgments

- Pacific AIDS Education & Training Center

# Webinar Series



# Webinar Agenda

- SO/GI data collection is a key component of culturally responsive care for LGBTQ patients.
- Review of SO/GI terminology
- Review of sample culturally responsive questions for SO/GI data collection
- Considerations for collecting SO/GI data
- Panel discussion

# Webinar Objectives

By the end of this webinar, participants will:

- Understand the importance of asking patients about sexual orientation and gender identity (SO/GI)
- Identify key terms related to SO/GI data collection
- Review effective communication strategies for collecting SO/GI data

# About the Primary Care Development Corporation (PCDC)

Founded in 1993, PCDC's mission is to catalyze excellence in primary care through **strategic community investment, capacity building, and policy initiatives to achieve health equity.**

- Certified as a Community Development Financial Institution (CDFI) by the U.S. Treasury
- Offices in New York City and California
- Three Programs:
  - Capital Investment
  - Performance Improvement
  - Policy & Advocacy

# About HIP in Health Care

- PCDC's High-Impact Prevention (HIP) in Health Care program is funded by CDC to build the capacity of healthcare organizations to deliver HIV prevention services and strategies within clinical settings.
- We provide training and technical assistance at **no cost** to healthcare organizations (i.e., direct service providers) across the United States and its affiliated territories.

# **SO/GI DATA COLLECTION IS A KEY COMPONENT OF CULTURALLY RESPONSIVE CARE FOR LGBTQ PATIENTS**

# Why Is It Important to Collect SO/GI Data?

- CDC's High-Impact HIV Prevention (HIP) approach is about using proven interventions for the right populations and in the right geographic areas.
- As a first step in achieving High-Impact HIV Prevention, we must ensure that the communities most affected by HIV have access to high quality and culturally responsive health care.
- Collecting the sexual orientation and gender identity data will allow us to know if we are reaching those most affected.

# Why Is It Important to Collect SO/GI Data?

- Collecting SO/GI data is essential for identifying and understanding health problems that disproportionately affect LGBTQ persons, and for developing services and interventions to reduce them.
- Collecting SO/GI data was recommended by the Institute of Medicine (IOM) in 2011, and endorsed by the Joint Commission and Healthy People 2020.
- In 2016 the Health Resources and Services Administration (HRSA) began to require health centers to collect and report SO/GI data in the Uniform Data System (UDS).

# Why Is It Important to Collect SO/GI Data?

- SO/GI data collection allows us to tell the LGBTQ story.
- It is an ethical and legal responsibility.
- SO/GI data collection also helps to:
  - Create safe spaces and affirm the LGBTQ community
  - Identify disparities in health outcomes
  - Secure funding
  - Inform public policies and law



# **A REVIEW OF SO/GI TERMINOLOGY**

# Review of Terminology

- LGBTQ: lesbian, gay, bisexual, transgender, and queer
- GNC: gender non-confirming
- SO/GI: sexual orientation and gender identity



# Review of Terminology

## SEX

- Male or female
- Sex assigned at birth
- The sex marked on someone's birth certificate

## SEXUAL ORIENTATION

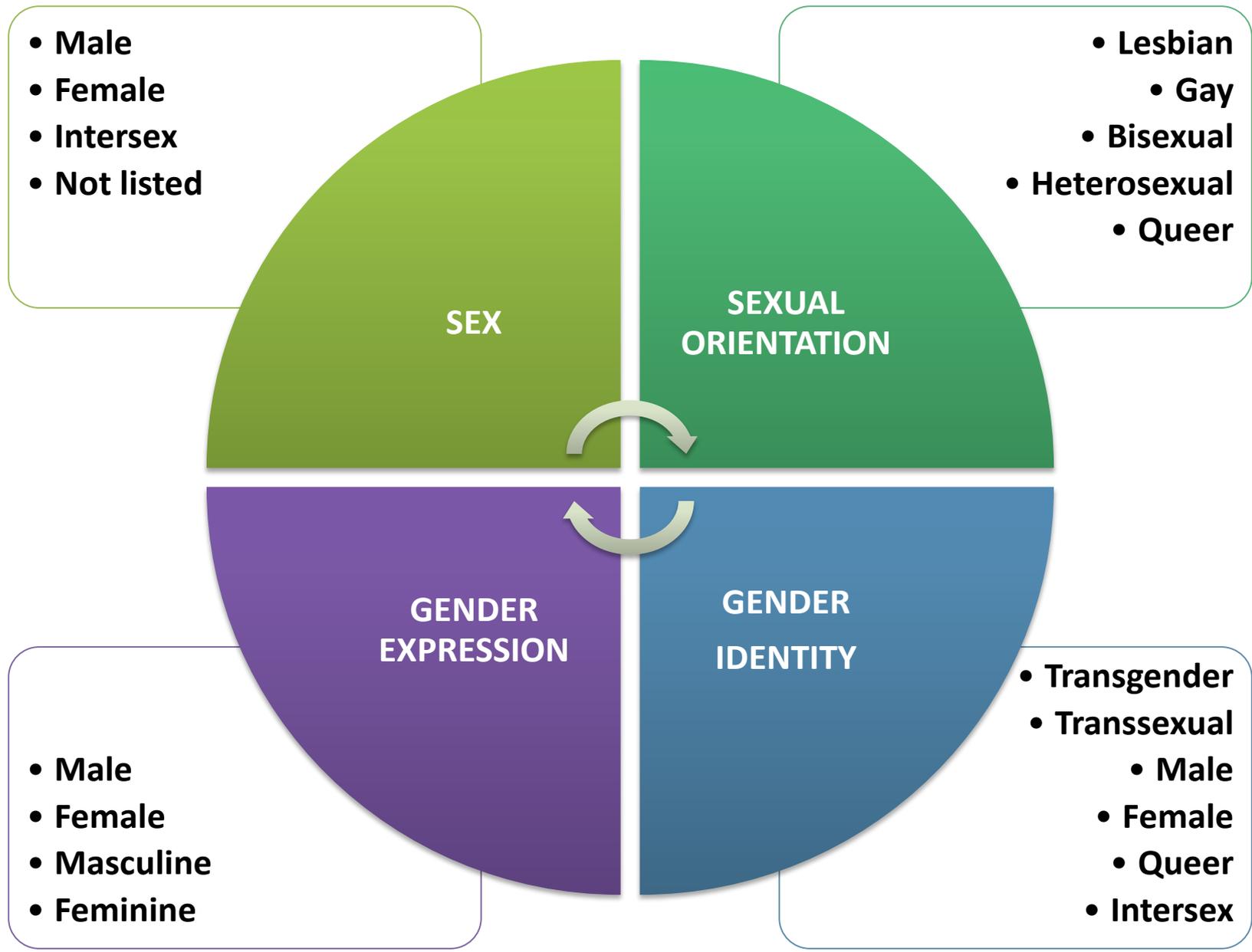
- An individual's sexual attraction, behavior, or identity with respect to the gender(s) of their romantic, emotional, or sexual partners

## GENDER EXPRESSION

- Gender expression, or the cues people use to identify another person's gender. This can include clothing, mannerisms, makeup, behavior, speech patterns, and more

## GENDER IDENTITY

- One's internal, deeply held sense of one's gender

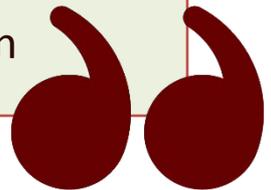


# Preferred Terminology

Instead of  
saying this:

Say this:

“Real” sex, “real” gender, genital sex	Sex assigned at birth
A transgender	Transgender person, or, person who is transgender
Transgenders	Transgender people, or, people who are transgender
Transgendered	Transgender
FTM, used to be a woman, born a female	Transgender man, or, Transman

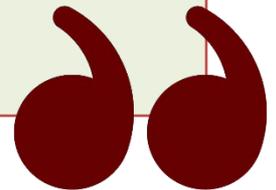


# Preferred Terminology

Instead of  
saying this:

Say this:

MTF, used to be a man, born a male	Transgender woman, or, Transwoman
Sex Change, The Surgery, Transgendering, pre-operative, post-operative	Medical Transition
Hermaphrodite	Intersex person or Person who is intersex
Sexual preference, homosexual	Sexual orientation



# **HOW TO ASK CULTURALLY RESPONSIVE QUESTIONS FOR SO/GI DATA COLLECTION**

# Quick Tips for Collecting SO/GI Data

- Be mindful of body language
- Be clear about professional responsibilities
- Use appropriate terminology
- Create affirmative spaces
- Implement Uniform Data Collection
- Maintain confidentiality



# How Do You Ask About a Patient's SO/GI?

- “How would you like me to address you?”
- If there are mistakes with names and pronouns:
  - Acknowledge mistakes and offer sincere, simple correction and apology
  - “I just used the wrong name, I’m sorry,” and correct yourself



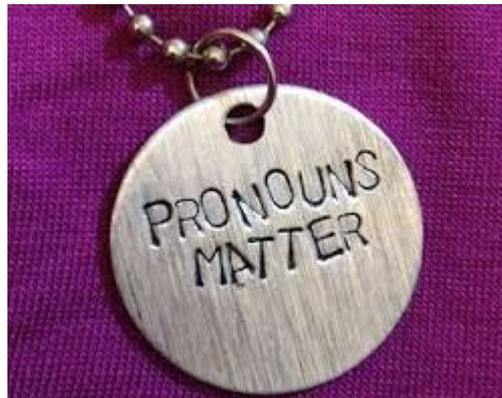
# How Do You Ask About a Patient's SO/GI?

- When a patient states they are transgender or gender non-conforming you can ask:
  - “Is the name you have given me the one you’d like us to call you when you are at the clinic?”
- When a patient states they are transgender or gender non-conforming you can say and ask:
  - “Some patients may prefer different names in private vs. public spaces. Are there any times or places that you would like me not to use this name or pronoun?”



# Sample- Intake Forms Questions

- Legal Name: \_\_\_\_\_
- Name you preferred to be called: \_\_\_\_\_
- Pronoun: \_\_\_\_\_
- Gender: \_\_\_\_\_
- Sexual partners men, women, or both?

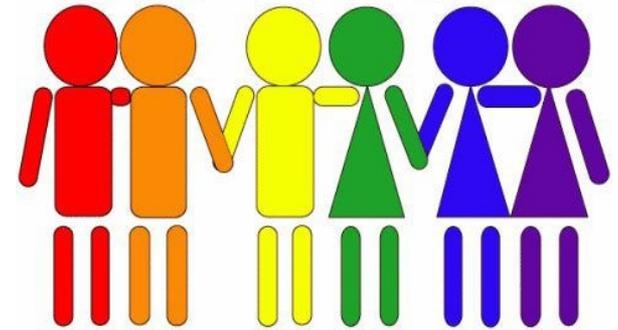


# Sample - Sexual Orientation Question

## What is your sexual orientation?

*(Possible prompt: Which of the following do you call yourself?)*

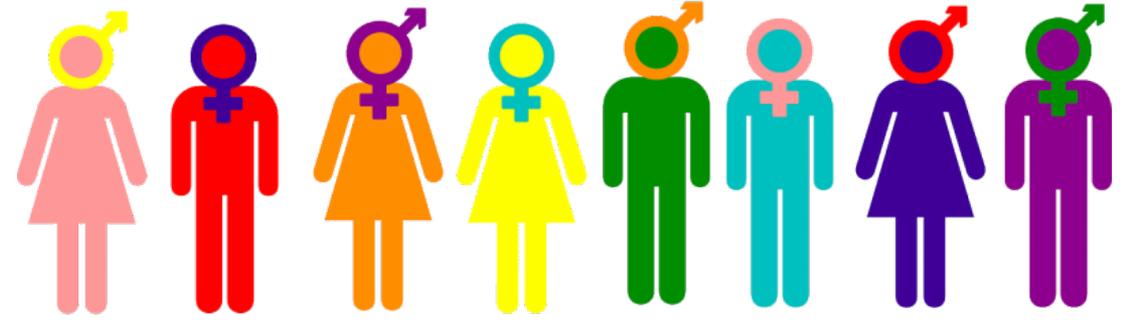
- Lesbian or Gay
- Straight (not lesbian or gay)
- Bisexual
- Something else
- Don't know
- Choose not to disclose



# Sample - Gender Identity Question

What sex were you assigned at birth?

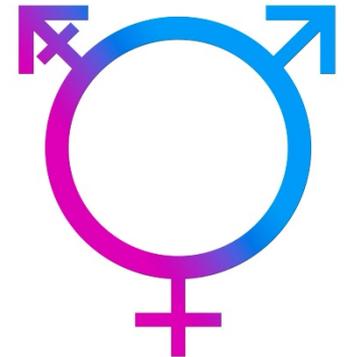
- Male
- Female



# Sample - Gender Identity Question

**Do you identify as:**

- Male
- Female
- Transgender male/Female-to-Male
- Transgender female/Male-to-Female
- Other
- Choose not to disclose



# CONSIDERATIONS FOR COLLECTING SO/GI DATA

# Considerations for SO/GI Data Training

## Clinicians

- Need to learn about LGBTQ health and the range of expression related to identity, behavior, and attraction. Staff needs to understand concepts.

## Non-clinical staff

- Front desk and patient registration staff must also receive training on LGBT health, communicating with LGBT patients, and achieving quality care with diverse patient populations.

## Patients

- Need to learn about why it is important to communicate this information, and feel comfortable that it will be used appropriately.



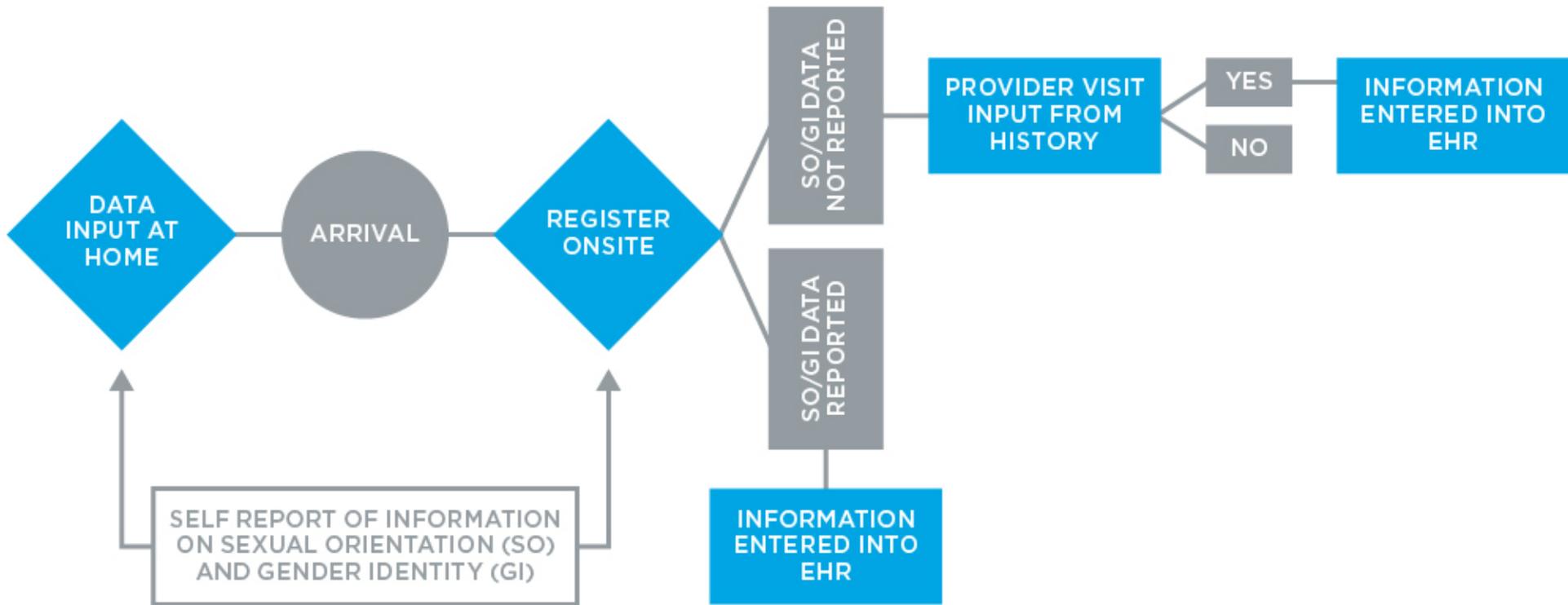
# Paperwork Considerations

## *Transgender & Gender Non-Conforming Patients*

- Review forms requiring patients to identify a gender marker
  - Is this a required question?
    - If so, ensure space for patients to explain how they would like to be addressed
  - Consider blank line for preferred name/pronouns instead of check boxes.
  - If required to use legal name on forms, reassure patients that you will continue to use their preferred name in other interactions. For example:
    - “I wanted to let you know we’ll need to use your legal name on this form. But we’ll continue to use the name that is most affirming for you in our other interactions.”



# Clinic Flow Considerations



# Let's Go Live!

# THANK YOU!

For more information about PCDC's HIP in Health Care capacity building assistance services, contact us at:

T: (212) 437-3970

E: [hip@pcdc.org](mailto:hip@pcdc.org)

W: [www.pcdc.org/hipinhealthcare](http://www.pcdc.org/hipinhealthcare)

# Resources

- AIDS Education and Training Center Program (AETC)
  - <https://aidsetc.org/>
- Centers for Disease Control and Prevention (CDC)
  - <https://www.cdc.gov/lgbthealth/>
- Healthy People 2020
  - <https://www.healthypeople.gov/2020/topics-objectives/topic/lesbian-gay-bisexual-and-transgender-health>
- Human Rights Campaign
  - <http://www.hrc.org/>
- Lambda Legal
  - <http://www.lambdalegal.org/issues/health-care-fairness>
- National Coalition for LGBT Health
  - <http://www.healthhiv.org/sites-causes/national-coalition-for-lgbt-health/>
- National LGBT Health Education Center
  - <http://www.lgbthealtheducation.org/>
- National Suicide Prevention Hotline
  - <http://suicidepreventionlifeline.org/#>
- Substance Abuse and Mental Health Services Administration (SAMHSA)
  - <http://www.samhsa.gov/behavioral-health-equity/lgbt>
- The Body
  - <http://www.thebody.com/>
- Transgender Training Institute
  - <http://www.transgendertraininginstitute.com/services/training/>