Electronic Health Record (EHR) and Care of Patients who are Transgender or Gender Non-Conforming

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Learning Objectives

1. Know how to enter and retrieve preferred name in the electronic health record.

2. Understand where to document sexual orientation and gender identification information in the electronic health record and how that will be changing.

3. Realize potential electronic health record pitfalls to avoid when caring for a patient who is transgender or gender non-conforming.

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EHR Challenges

1. Collecting gender identity and sex at birth.

   – Legal Gender (Sex) must be part of the chart

   – Sex ≠ Gender identity

   – Gender and/or Sex ≠ Anatomy

2. Capturing and displaying preferred name for all staff.

3. Appropriate use of pronouns.

4. Gender-appropriate images.

5. Identifying preventive healthcare appropriately based on the organs and risk level of each patient.

6. Tracking treatment (hormonal and surgery).

7. Finding appropriate care for patients.

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Why we need to care

1. Study in Am J Public Health estimates a current US population size of 390 adults per 100 000, or almost 1 million adults nationally (Am J Public Health. 2017 February; 107(2): e1–e8.)

2. A 2012 Gallup poll found that 2.9 percent of Minnesota's population overall identify as LGBT. Tracking during 2012-2014 by Gallup found that 3.6 percent of adults in the Minneapolis-St. Paul metropolitan area identify as LGBT, lower than many other major metropolitan areas.

3. In the Minnesota Student Survey, 1 percent of ninth and 11th grade students identify as gay or lesbian. However, 2 to 8 percent identify as bisexual, and another 3 to 6 percent identify as not sure (questioning). In each grade, a range of 2 to 4 percent of students identify as transgender, genderqueer, gender fluid, or unsure of their gender identity.

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Why we need to care

Fairview Epic has 5.3 million patients

- 8,169 patients gender "unknown"

- 2,294 patients who have had a diagnosis of transgender or gender identity disorder or gender dysphoria

- 358 patients who have those diagnoses in their history

- 260 patients who have a history of surgery for gender reassignment

HealthEast Epic has 1.7 million patients

- 4,142 patients gender "unknown"

- 134 patients who have had a diagnosis of transgender or gender identity disorder or gender dysphoria

- 47 patients who have those diagnoses in their history

- No patients who have a history of surgery for gender reassignment

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Addressing the Challenges

1. Institute of Medicine and Fenway Institute issues guidelines in 2011 recommending that data on sexual orientation and gender identity should be collected in electronic health records

2. JACHO recommends in 2011 to identify a process to document self-reported sexual orientation and gender identity information in the medical record.

3. CMS in Meaningful Use Stage 3 required EHR vendors enable a user to record, change and access sexual orientation/gender identity to be certified in 2015

4. The Office of the National Coordinator for Health Information Technology (ONC) interoperability standards recommendation to collect discrete structured data on patient gender identity, sex, and sexual orientation

5. Healthy People 2020: Increase the number of population-based data systems used to monitor Healthy People 2020 objectives which collect standardized data that identify transgender populations

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Preferred Name

- *HealthEast Epic*

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Preferred Name

- *HealthEast Epic*

Marineday, Penny
Preferred Name: Peanut
Female, 20 y.o., 04/11/1998
MRN: 2005849
PCP: WHITECOAT, WALT (555-555-5555), No Clinic Listed
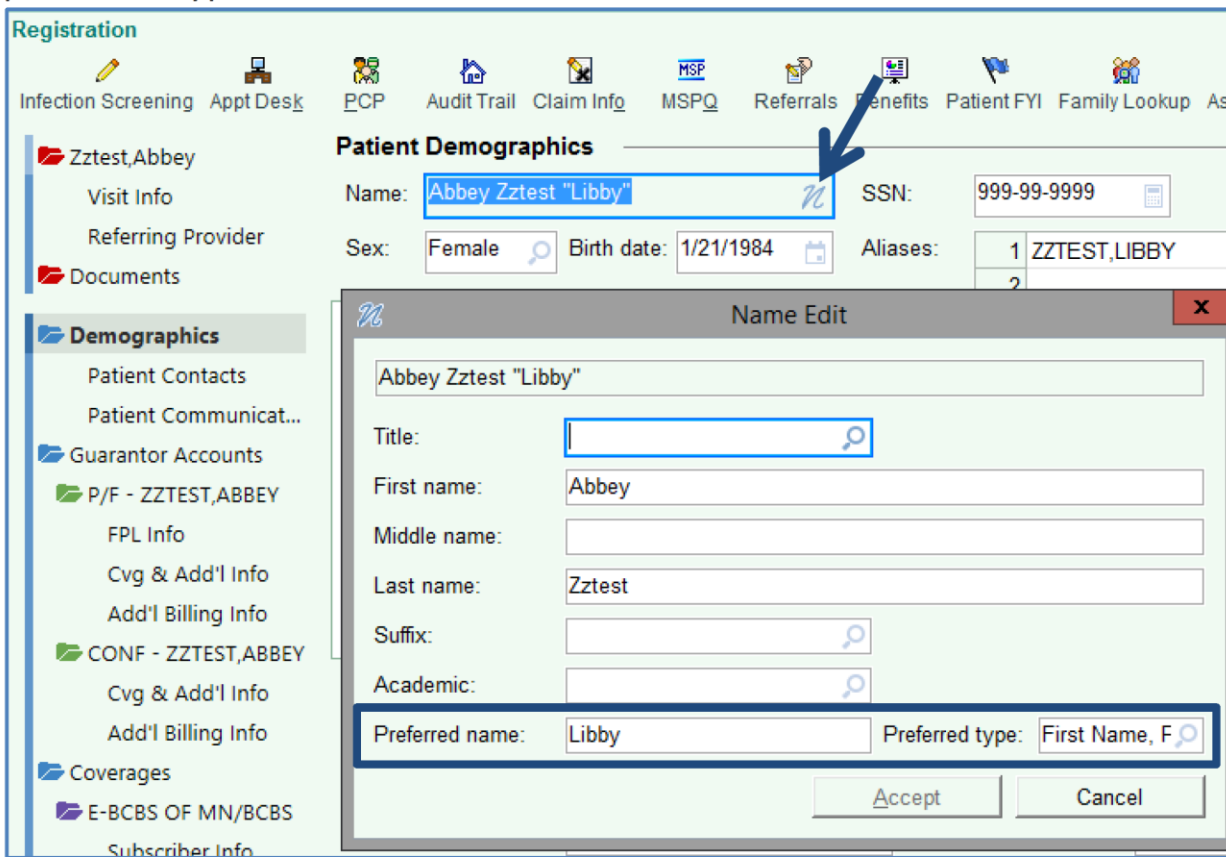Bed: TRN Sur Pool 05

Code Status History: Not on file
HC Directive Filed?: None
Care Team:
MyChart: Inactive

Preferred Name

- *Fairview and HealthEast Epic*

1. Click on the edit button [N] .
2. Enter patients preferred name in the preferred name field.
3. Enter a preferred type.

Preferred Name

- *Fairview and HealthEast Epic*

The phrase .prefname will pull this in to any note

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Gender Identity

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Populating the Gender Identity Field:

1. Click on the 'Gender Identity' field in Demographics.
2. Enter gender identity according to the patient's request.
3. The 'Sex' field is <u>not to be changed</u> by Scheduling or Registration staff. If the patients legal sex changes, that process is handled by the clinical teams.

IMPORTANT NOTE: Do not provide any additional details regarding the patient request in account notes, or anywhere else in the Registration.

Gender Identity

- *Fairview Epic*

IMPORTANT NOTE: Gender Identity is NOT included in the standard Registration process; this question should never be asked by Scheduling or Registration staff. The ONLY time it is used is when the patient states they identify with a gender different than what we show listed in the sex field.

SOGI Smartform
- *Fairview Epic*

SOGI Smartset

- *Fairview Epic*

SOGI Smarttext (note)

- *Fairview Epic*

Transgender History Intake:

HPI

{ Help Text *Can delete when done*. This info tells us more about you as a transgender person and how we can help you. We at FAIRVIEW CLINICS EAGAN want to keep you safe and healthy. We will never penalize you or deny you care based on what you tell us on this form. If you feel uncomfortable answering a question, that is ok. }

Ab is a 66 year old individual who presents today for interest in {Masculinizing:90400003} hormone therapy to better align their body with their gender identity.
Came to this clinic via referral from: ***

1-How do you identify? **BOLD** all that apply

Male   Female   Transgender   FTM   MTF   Intersex

Genderqueer Gender non-conforming   Bigender   Don't know   Other:

2. What pronouns do you prefer? { :141774}
3-What age did you first feel your gender identity (internal sense of gender) did not match your physical body?   *** years old
4-Have you ever felt depressed or suicidal because your gender identity and body don't match?   { :138801::"No"}
5-Have you legally changed your name?   {YES NO:121833}
If yes: prior name for ROI:
Gender marker on ID's?   {YES NO:121833}
6-Have you ever seen a health care provider about being transgender?{ :138801::"No"}
When were you first treated and where? ***
7-What hormones have you been on and for how long? (These can be treatments you were prescribed, that you got from a friend or bought without a prescription. Include any treatments you currently take.) ***
8-Ever had any problems with hormone treatment? { :138801::"No"}
9-If not on hormones, would you like to be?   {YES NO:121833}
What are your goals for hormone therapy ? ***
10-Have you had any gender affirmation surgery?   { :138801::"No"}
11-Do you want to have surgery now or in future?   { :138801::"No"}
12-Are you out at work or at school or at home?   {UMP FM:141770::"Some people know. Out at ***. Not out at ***."}
13-What are your other questions or concerns today? ***
14-What else we should know about you?   ***

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Transgender care Smartform

- *Fairview Epic*

	4/15/18 1200	
One Time Info		
Date Hormone Tx Began		
Primary MD		
Therapist		
Visit Measurements Feminizing		
Breast Size		
Hip Size		
Facial Hair		
Visit Measurements Masculinizing		
Voice		
Acne		
Body and Facial Hair		
Amenorrhea		
Med Tracking		
Medication 1		
Medication 2		
Medication 3		
Medication 4		
Medication 5		
Other Labs/Tests		
Other Labs/Tests		

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SOGI Synopsis

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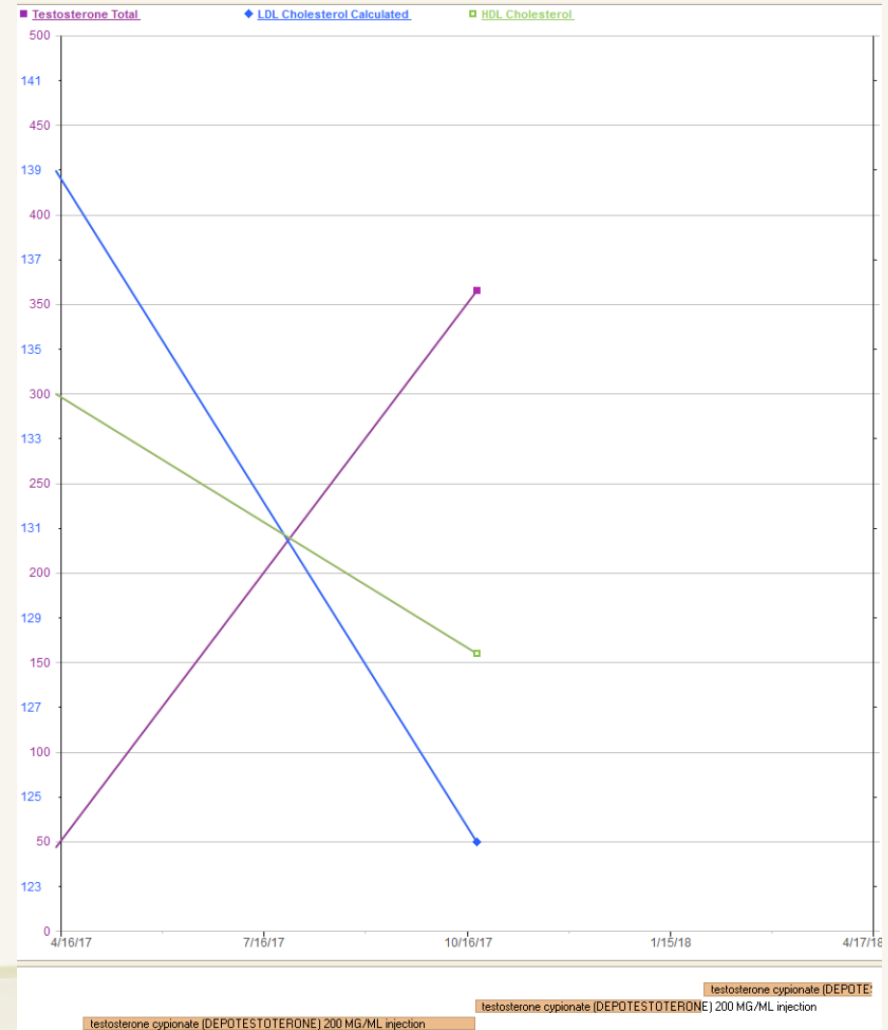
Pronouns – Still an Issue

- Even at FV where the smartform collects pronouns, it does NOT appear correctly automatically in the chart.
- Documenting them elsewhere can improve visibility but can be awkward.
- Re-writing note templates to avoid pronouns can be helpful

June 1, 2017

Touchworks Xxxallscripts
3456 TOUCHWORKS BLVD
APT 111
MINNEAPOLIS MN 55455

0051042448

Dear Siri She Her,

We are writing to inform you of your most recent c
cholesterol results
No results found from the In Basket message.

Reports and Dashboards   Addendum:

Xxxallscripts, Touchworks   Male, 35 year old, 12/25/1981
MRN: 0051042448   Phone: 321-123-1235
Preferred Name: Siri She Her   PCP w/ Phone: RAMER, TIMOTHY (6

SnapShot

Medications

Filters   Clear Filters   Med Notes   New Rx   Change Rx   Reorder

As of Now   History

Prescription Summary for This Visit (2/13/2017) (4 listed)

T MEDS REPORT (ALL TYPES-RICH TEXT)   OB Induction Plan   OnePlan Coordinated Care   Wt   More

Specialty Comments
Pronouns: She/Her

6/24/2016 Provider Previsit Plan
Labs before visit: Dx 2 +++Labs:Lipids, BMP, A1c,
Timothy Ramer, MD

Health Maintenance   Postponed   Soon   Due   Late

Topic	Due	Last Communication
LDL LESS THAN 100 RED WING USE ONLY	12/25/1981	
GAD QUESTIONNAIRE 1 YEAR	12/26/1981	
PHQ-9 Q3 MONTHS	12/26/1981	
PHQ-9 Q1 MONTH	12/26/1981	

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Appropriate Preventive Care Issues

- Rules in epic still rely on sex field to trigger health maintenance, which can lead to incorrect suggestions about preventive care.

- We removed gender restrictions on some Health maintenance reminders (for example, so we can have a reminder for a Pap smear or Mammogram on a Trans man when appropriate).

- SOGI form does not change health maintenance or satisfy quality measures.

- Appropriate completion of surgical history will satisfy quality measures but will not retire health maintenance – need to manually turn off.

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Appropriate Care - Referral due in May

- Referral order will go to work queue
- Patients will be called by coordinator to schedule

Future Build: Pronouns

- Starting in Epic 2018, most pronoun SmartLinks will use gender identity to determine which pronoun or title to use.

- If a patient's gender identity isn't documented as male, transgender male, transgender female, or female, SmartLinks that usually return a pronoun instead retrieve the patient's preferred name.

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Future Build: Patient Questionnaires

Sexual Orientation and Gender Identity

Please answer the following questions and click the **Continue** button.

What is your sexual orientation?
Select all that apply.

Lesbian or Gay | Straight (not lesbian or gay) | Bisexual | Something else | Don't know

Choose not to disclose

What is your gender identity?

Female | Male | Transgender Female / Male-to-Female | Transgender Male / Female-to-Male | Other

Choose not to disclose

CONTINUE | FINISH LATER | CANCEL

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Future Build: Preferred Name

- Starting in Epic 2018, you can show patients' preferred names almost anywhere patient names appear.

- Multi Prov Schedule Patient Name shows preferred names by default in the Patient Lists activity and the Schedule activity.

- OpTime and ED columns can be configured to display preferred name.

- Many reports and print groups in chart review will be able to be configured to show preferred name.

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Future Build: Improve Visibility of Gender Identity

- Information from SOGI smartform can be used in best practice advisories which can help ensure that providers see information about sexual orientation and gender identity when it is most relevant to the care they are providing.

- Gender Identity in a Patient FYI Flag as an alternative to better inform care providers.

- Choose whether In Basket shows a patient's gender identity, legal sex, or sex assigned at birth.

- Epic-released Physical Exam SmartForms allow clinicians to accurately document in NoteWriter because they pull in the correct images and map to the correct SmartData Elements based on the patient's gender.

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Resources

- National LGBT Health Education Center: https://www.lgbthealtheducation.org

- **The Health of Lesbian, Gay, Bisexual, and Transgender People Building a Foundation for Better Understanding**

  Institute of Medicine (US) Committee on Lesbian, Gay, Bisexual, and Transgender Health Issues and Research Gaps and Opportunities.

  Washington (DC): National Academies Press (US); 2011.

  https://www.ncbi.nlm.nih.gov/books/NBK64806/

- The Joint Commission: *Advancing Effective Communication, Cultural Competence, and Patient- and Family- Centered Care for the Lesbian, Gay, Bisexual, and Trans- gender (LGBT) Community: A Field Guide*. Oak Brook, IL, Oct. 2011. LGBTFieldGuide.pdf.

- CDC: https://www.cdc.gov/lgbthealth/transgender.htm

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Questions?