



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.



EHR Challenges

1. Collecting gender identity and sex at birth.
 - Legal Gender (Sex) must be part of the chart
 - Sex \neq Gender identity
 - Gender and/or Sex \neq 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.



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.



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



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



Preferred Name

- HealthEast Epic*

Demographics

Contact Information	Clinical Information	Additional Information	Advance Directives	
No photo for this patient.	Name:	<input type="text" value="Penny Marineday"/>	SSN:	<input type="text" value="xxx-xx-9120"/>
	Sex:	<input type="text" value="Female"/>	Birth date:	<input type="text" value="4/11/1998"/>
	Patient status:	<input type="text" value="Alive"/>	Aliases:	<input type="text" value="1"/>
	Marital status:	<input type="text" value="Single"/>	Patient MRNs:	<input type="text" value="1 E7726"/>
	Ethnic group:	<input type="text" value="Not Hispanic or Latino"/>	Patient type:	<input type="text" value="1"/>
Preferred form of address:			<input type="text" value="Peanut"/>	







Permanent Address	Temporary Address	Confidential Address																
Address:	<input type="text" value="123 Leafy Lane"/>	Contact Information:																
City (or ZIP):	<input type="text" value="SAINT PAUL"/>	<table border="1"> <thead> <tr> <th></th> <th>Number Type</th> <th>Number</th> <th></th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Home Phone</td> <td>651-123-4567</td> <td></td> </tr> <tr> <td>2</td> <td>Work Phone</td> <td></td> <td></td> </tr> <tr> <td>3</td> <td>Mobile</td> <td>651-987-6543</td> <td></td> </tr> </tbody> </table>		Number Type	Number		1	Home Phone	651-123-4567		2	Work Phone			3	Mobile	651-987-6543	
	Number Type	Number																
1	Home Phone	651-123-4567																
2	Work Phone																	
3	Mobile	651-987-6543																
State:	<input type="text" value="MN"/> ZIP: <input type="text" value="55104"/>	E-mail:	<input type="text" value="brianna@epic.com"/>															
County:	<input type="text" value="RAMSEY"/>	Comments:	<input type="text" value="NO MI"/>															
Country:	<input type="text" value="United States of America"/>																	






Preferred Name

- *HealthEast Epic*

     **Marineday, Penny** 


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

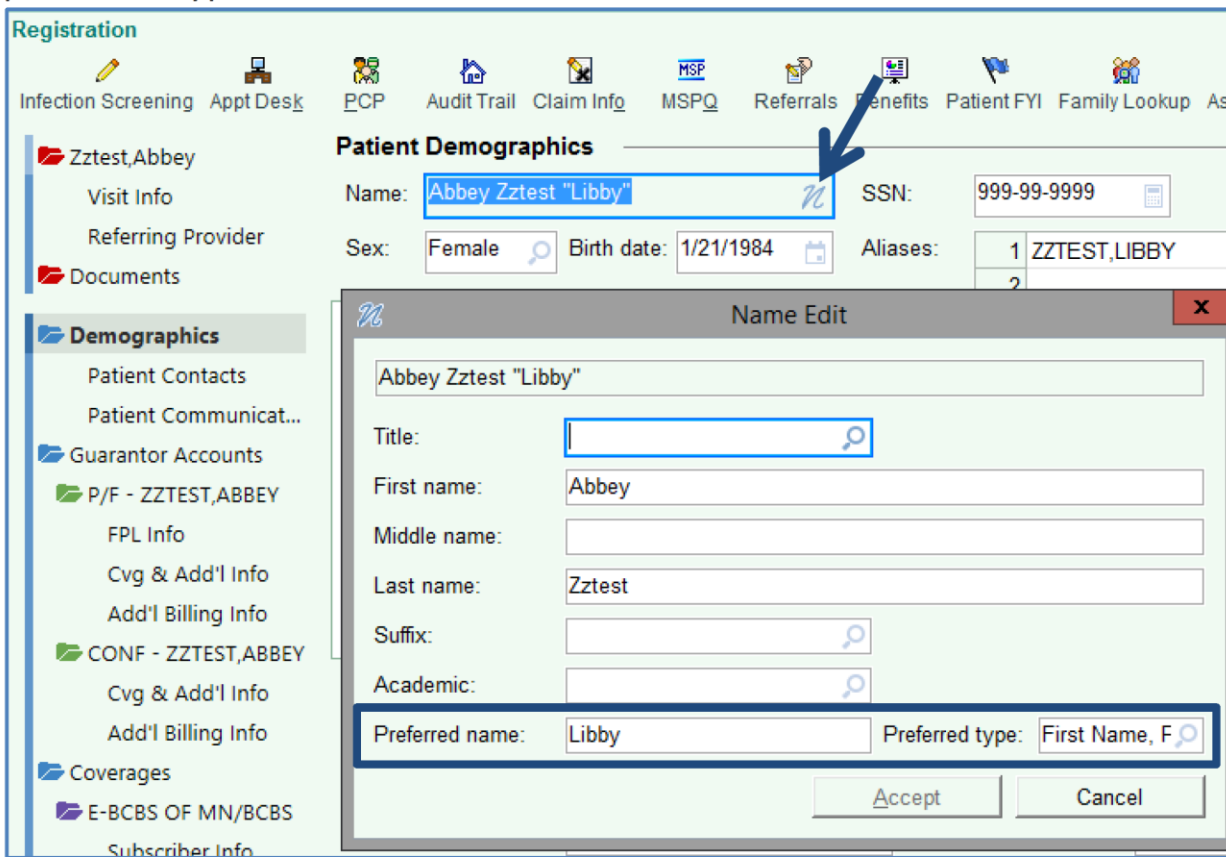
Code Status History: Not on file
HC Directive Filed?: None
Care Team: 
MyChart: Inactive



Preferred Name

- *Fairview and HealthEast Epic*

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



The screenshot shows the 'Registration' interface in Epic. The 'Patient Demographics' section is active, displaying the patient's name as 'Abbey Zztest "Libby"'. A blue arrow points to the edit icon (a small 'n' in a circle) next to the name field. Below the main interface, a 'Name Edit' dialog box is open, showing the current name and fields for 'Title', 'First name', 'Middle name', 'Last name', 'Suffix', and 'Academic'. The 'Preferred name' field is highlighted with a blue box and contains the text 'Libby'. The 'Preferred type' dropdown menu is also highlighted and set to 'First Name, F'.

Aliases	Value
1	ZZTEST,LIBBY
2	


Field	Value
Name	Abbey Zztest "Libby"
SSN	999-99-9999
Sex	Female
Birth date	1/21/1984
Aliases	1 ZZTEST,LIBBY 2

Field	Value
Name	Abbey Zztest "Libby"
Title	
First name	Abbey
Middle name	
Last name	Zztest
Suffix	
Academic	
Preferred name	Libby
Preferred type	First Name, F



Preferred Name


- *Fairview and HealthEast Epic*

 Coptic,Rachel ×
Coptic, Rachel Female, 32 year old, 09/23/1985
MRN: 001323 Patient Type: None
Preferred Name: Rach PCP w/ Phone: RHENITE, PAT (320-983-7400)

Time	Patient	Preferred Name	Age	Appt
11:00 AM	Zzactionplantest, Linda	Lin	35-year old	30
11:30 AM	Zzphxrecipient, Joe	Joseph	55-year old	30

Welcome,
Joseph Zzphxrecipient

[Log Out](#)



Joseph

The phrase .prefname will pull this in to any note



Gender Identity

- *Fairview Epic*

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 not to be changed 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.

Registration

Infection Screening Appt Desk PCP Audit Trail MSPQ Referrals Benefits Patient FYI Family Lookup Assoc Recs Reg History Auth/Cert Linkag

Zztest,Abbie

Encounter Info Referring Provider Hospital Accounts OUTPATIENT - ZZTE... Coverage Info Claim Info Documents

Demographics Patient Contacts Patient Communicat...

Patient Demographics

Name: SSN:

Sex: Birth date: Aliases:

Gender identity:

Permanent Address **Temporary Address** Confidential Address

Address: Contact Information:

	Number Type	Number	
1	Home Phone	321-456-2225	<input type="text"/>
2	Work Phone		<input type="text"/>
3	Mobile		<input type="text"/>

City (or ZIP):

State: ZIP: E-mail:



Gender Identity

- *Fairview Epic*

Gender Identity will also display on the Interactive Face Sheet:

Registration

Detailed View Infection Screening Appt Desk PCP Audit Trail MSP Referrals Benefits Patient FYI Family Lookup Assoc Recs Reg History Auth/Cert Linkage Auth/Cert Benefit Collection Es

Zztest, Abbie
Female | 8/11/1945 (72 yrs) | MRN: 0060197161

Demographics 123 Test Main St
MINNEAPOLIS, MN 55404

Gender Identity: [Arrow points here]
Home: 321-456-2225
Work:
Mobile:
Email:
Reason None: No Email Address
Pref Language: English
Interp Needed: No
Religion: Non-Denominational

Marital Status: Married
Ethnicity: Egyptian
Race: White
Country Origin: Egypt
Patient Type: RESEARCH OPT

Patient Communication Preferences

Special Needs

PCP: Zzrehearsal, Oswald, MD (Ge* Employment: Target
Primary Loc Fairview POC cp TST 03/10/17

Patient Contacts Chad ZZtest (Spouse)
321-456-2225

New | Verify patient

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 (Sexual Orientation Gender Identity) Smartform

? Close

Sexuality

Patient's sexual orientation:

Gender Identity

Autofill with default responses for:

Patient's gender identity:

Patient's sex assigned at birth:

Patient's pronouns:

Steps patient has taken to transition, if any:

Patient's future plans to transition, if any:

Organ Inventory

Organs the patient currently has:

Organs present at birth or expected at birth to develop:

Organs hormonally enhanced or developed:

Organs surgically enhanced or constructed:



SOGI Smartset

- *Fairview Epic*

▼ UMP FM TRANS CARE

Documentation Collapse

> Progress Note Click for more

Medications Collapse

> Masculinizing Meds Click for more

> Feminizing Anti-androgens Click for more

> Feminizing Estrogens Click for more

> Feminizing Progestins Click for more

> General Supplies Click for more

Labs - FMG Collapse

> Masculinizing - Today's Labs FMG Click for more

> Masculinizing - Future Labs FMG Click for more

> Feminizing - Today's Labs FMG Click for more

> Feminizing - Future Labs FMG Click for more

Patient Instructions Collapse

> Transgender Consents Click for more

> Trans Resources and Information Click for more

SmartSets

ump trans + Add

▼ Suggestions

Search:

%	ID	Protocol Name
<input checked="" type="checkbox"/>	901201002	UMP FM TRANS CARE



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? ***



Transgender care Smartform

- *Fairview Epic*

9 Developed by Dr... GAD-7 (Pfizer Inc, 20... Asthma Control Test Transgender Transgender

Mode: **Expanded** View All Reset No

	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	<input type="text"/>	<input type="button" value="📎"/>



SOGI Synopsis

• Fairview Epic

Synopsis

OB Snopsis | GYN Synopsis | FM Gen Synopsis | FM Lipids | FM HTN | FM DM/VASCULAR DISEASE | FM Anemia | **Transgender Synopsis**

Days: 4/13/2017 | 4/26/2017 | 10/20/2017 | Most Recent Value | Last 3 Years

All

Patient Spotlight

No data to display.

Patient Information

Date Hormone Tx Began				
Primary MD				
Therapist				
SMOKING TOBACCO USE	Never Smoker	Never Smoker	Never Smoker	Never Smoker 10/20/2017

Vitals

BP	117/79	118/81	113/77	113/77 10/20/2017
Height	5' 8" (172.7 cm)	5' 8" (172.7 cm)	5' 8" (172.7 cm)	5' 8" (172.7 cm) 10/20/2017
Weight	155 lb	199 lb 9.6 oz	186 lb 3.2 oz	186 lb 3.2 oz 10/20/2017

Visit Measurements

No data to display.

Lab Results

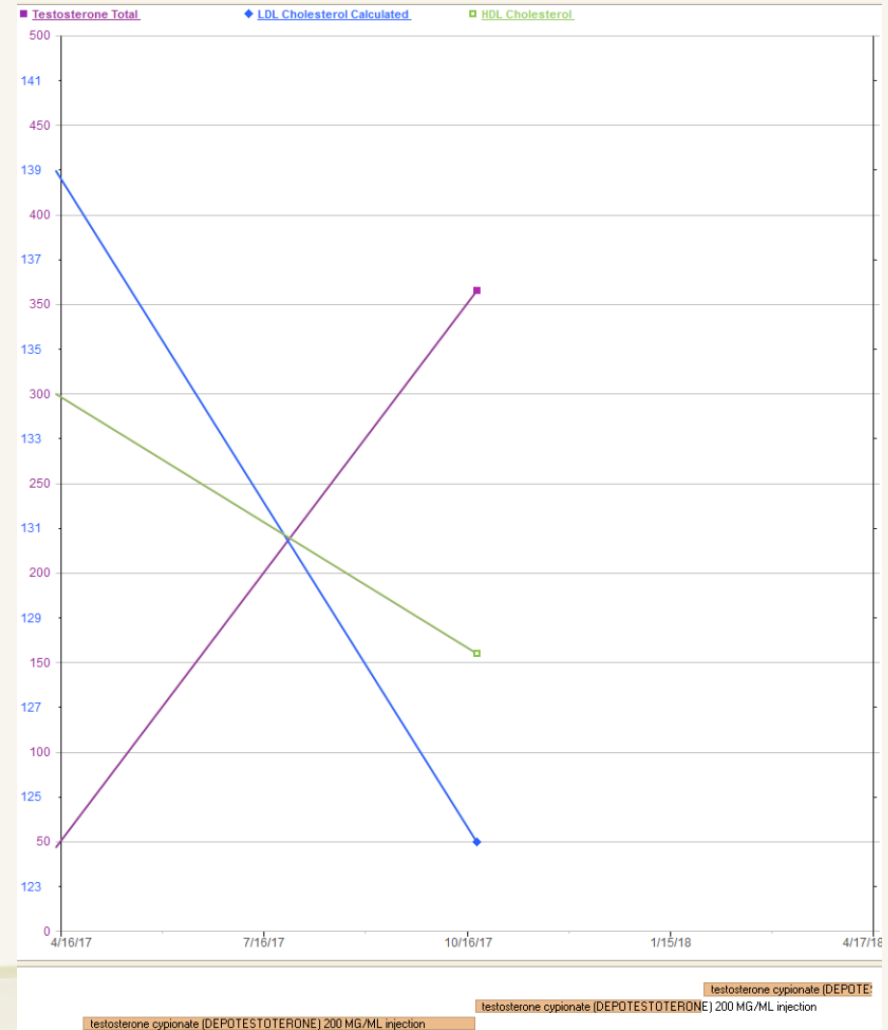
Test	4/13/2017	4/26/2017	10/20/2017
Testosterone Free			
Testosterone % Free			
<input checked="" type="checkbox"/> Testosterone Total	47	358 (A)	358 (A)
<input type="checkbox"/> Hemoglobin	14.0	15.0	15.0
Estradiol			
Estradiol Ultrasensitive			
<input type="checkbox"/> Triglycerides	141.7	50.4	50.4
<input checked="" type="checkbox"/> HDL Cholesterol	51.8	48.9	48.9
<input checked="" type="checkbox"/> LDL Cholesterol Calculated	139 (A)	124	124
<input type="checkbox"/> AST	15.7	17.9	17.9
<input type="checkbox"/> ALT	22.0	20.3	20.3
<input type="checkbox"/> Alkaline Phosphatase	78.4	88.4	88.4
<input type="checkbox"/> Glucose	87.0	86.0	86.0
Hemoglobin A1C			
Urea Nitrogen			
Potassium			
Creatinine			
HIV-1 & HIV-2 Antibody			
Hepatitis C ABY			
Hep B Surface Aby			
Hep B Surface Antigen			
Other Labs/Tests			

Current Meds

- testosterone cypionate (DEPOTESTOTERONE) 200 MG/ML injection Prescribed dose: 50 mg Weekly Starting date: 4/26/2017 Ending date: 4/26/2017 (Discontinued)
- testosterone cypionate (DEPOTESTOTERONE) 200 MG/ML injection Prescribed dose: 30 mg Weekly Starting date: 4/26/2017 Ending date: 10/20/2017 (Discontinued)
- testosterone cypionate (DEPOTESTOTERONE) 200 MG/ML injection Prescribed dose: 50 mg Weekly Starting date: 10/20/2017 Ending date: 1/30/2018 (Discontinued)
- testosterone cypionate (DEPOTESTOTERONE) 200 MG/ML injection Prescribed dose: 50 mg Weekly Starting date: 1/31/2018 (active)

Medication Tracking

Medication 1	
Medication 2	
Medication 3	
Medication 4	19
Medication 5	





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 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)

IT 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	



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.



Appropriate Care - Referral due in May

Facility List Search - Chdrzzztest,Chdrfifteen

REF TRANS

Medications Procedures Order

	Name	Med Form	Route	Type	Dis	Pref List
	CENTER FOR SEXUAL HEALTH REFERRAL (REFERRAL)			Referr		AMB FACI
	COMPREHENSIVE GENDER CARE REFERRAL (TRANS)			Referr		AMB FACI

Your provider has referred you for Comprehensive Gender Care:

{Comprehensive gender care services:146174}

Additional details/notes for coordinator: ***

Please be aware that coverage of these services

Please bring the following with you to your appointment:

- Hormone Therapy
- Plastic Surgery
- Mental Health
- OB/GYN
- Urology
- Primary Care
- Voice Training
- Other - Please specify: ***

and limitations of your health insurance plan. Call member services at your health plan with any benefit or coverage questions.

- (1) List of current medications
- (2) This referral request
- (3) Any documents/labs given to you for this referral

- 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.



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



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.



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.



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>

Questions?

