



# SOGI Documentation – Non-Clinical Staff

**Intended Audience:** Staff who are responsible for scheduling, registering, and checking in patients in Epic.

**What's in it for me?** Improved patient experience regarding inclusion and diversity

When a patient **self-reports** sexual orientation and/or gender identity information, how to collect this information is outlined in the steps below. This is important information to document as it will enable the healthcare team to base clinical decisions and collect relevant findings.

- **SOGI:** An acronym for sexual orientation and gender identity
- **Sexual Orientation:** An inherent or immutable and enduring emotional, romantic, or sexual attraction to other people
- **Gender Identity:** The internal perception of one's gender and how they label and express themselves

**Note:** Although mentioned together sexual orientation and gender identity do not impact one another. They are not one and the same.

## From the Access Navigator:

1. Click the **Demographics** section.
2. Update the fields appropriately as the patient self-reports.



The screenshot shows the Epic Demographics form for a patient named Cora Bear. The form includes fields for Name, SSN, Date of Birth, Legal Sex, Gender Identity, Sex Assigned at Birth, and Sexual Orientation. The Legal Sex, Gender Identity, Sex Assigned at Birth, and Sexual Orientation fields are highlighted with red boxes.

## (Epic) Key Terms to Know:

- **Legal / Administrative Sex:** Represents the sex used for legal / administrative purposes.
- **Sex (legal):** Typically listed on the patient's ID (Driver's license, State ID, Passport)
  - Female
  - Male
  - Unknown
- **Gender identity:** The internal perception of one's gender and how they label and express themselves
  - Choose not to disclose
  - Female
  - Male
  - Other: People who do not identify as either male or female (non-binary)

- Transgender Female / Male to Female: A person born with the assigned sex of male who identifies as female
- Transgender Male / Female to Male: A person born with assigned sex of female who identifies as male
- **Sex assigned at birth:** The gender assigned, usually by a medical professional, at birth
  - Chose not to disclose
  - Female
  - Male
  - Not recorded on birth certificate
  - Uncertain
  - Unknown
- **Sexual orientation:** An inherent or immutable and enduring emotional, romantic, or sexual attraction to others
  - Bisexual: A person emotionally, romantically, r sexually attracted to more than one sex, gender, or gender identity, although not necessarily simultaneously or in the same degree
  - Choose not to disclose
  - Don't know: Patient is unsure
  - Gay: A term used to describe individuals who are primarily emotionally, physically, and/or sexually attracted to members of the same sex and/or gender
  - Lesbian: A woman who is emotionally, romantically, or sexually attracted to other women
  - Lesbian or Gay
  - Something else: A person with sexualities outside of what is listed i.e., pansexual, asexual, queer
  - Straight (not lesbian or gay): A person who is attracted to another person of the opposite sex

**Patient Pronouns:** It is important to address patients as they wish to be addressed. Asking someone their pronouns enables high quality communication and patient centric care.

- He/Him, She/Her. They/Them, Theirs, or the patient's name
- It is more important to individualize care than it is to be grammatically correct
  - They/Them/Theirs during a handoff – "Tommy, in room 304B is ready for their x-ray"
  - Patient's name – "Justin please follow me back to the exam room"
  - He/Him – "He has an appointment to follow up with Dr. Smith on Tuesday"