



Collecting SOGIE Data

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Agenda

- Housekeeping
- Why We Ask
- Vocabulary
- How To Ask
- Troubleshooting
- Q&A



Housekeeping

- Full participation is required. Cameras are highly recommended.
- This will be a BRAVE space. Respect your peers and the presenter to the best of your ability at all times.
- Practice the vocabulary. Accept critique and correction with grace. Practice generates fluency.
- All of us work with different systems. I will present best practices applicable to all. If you want support figuring out how to make it happen at your specific organization, email me for support at TransHealthInitiative@ebcap.org



What is SOGIE?

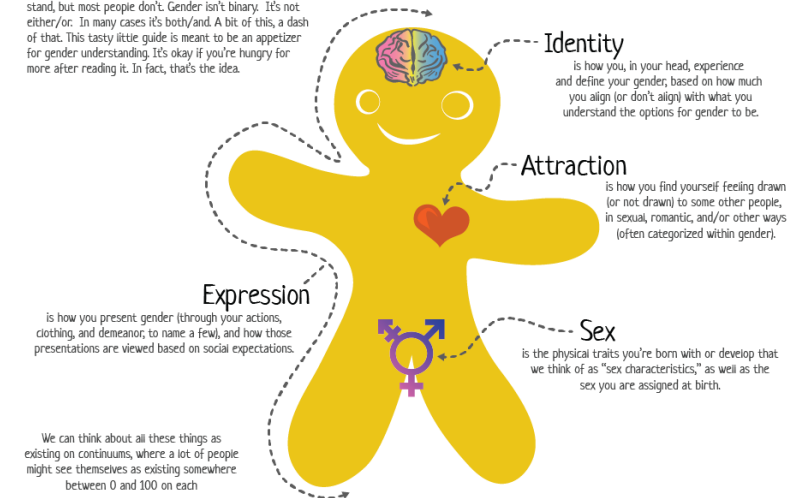
Sexual Orientation, Gender Identity & Expression

- Gender Identity: Who you are
- Gender Expression: How you show the world who you are
- Sexual Orientation: Who you are interested in being with

The Genderbread Person

by its pronounced **METROsexual** com

Gender is one of those things everyone thinks they understand, but most people don't. Gender isn't binary. It's not either/or. In many cases it's both/and. A bit of this, a dash of that. This tasty little guide is meant to be an appetizer for gender understanding. It's okay if you're hungry for more after reading it. In fact, that's the idea.



We can think about all these things as existing on continuums, where a lot of people might see themselves as existing somewhere between 0 and 100 on each

⊖ means a lack of what's on the right side

Gender Identity



personality traits, jobs, hobbies, likes, dislikes, roles, expectations

common GENDER IDENTITY things

Gender Expression



style, grooming, clothing, mannerisms, affect, appearance, hair, make-up

common GENDER EXPRESSION things

Anatomical Sex



body hair, chest, hips, shoulders, hormones, penis, vulva, chromosomes, voice pitch

common ANATOMICAL SEX things

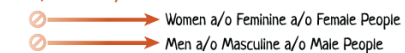
Identity ≠ Expression ≠ Sex
Gender ≠ Sexual Orientation

Sex Assigned At Birth

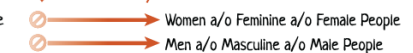
Female Intersex Male

Typically based solely on external genitalia present at birth ignoring internal anatomy, biology, and change throughout life. Sex Assigned At Birth (SAAB) is key for distinguishing between the terms "cisgender" (when SAAB aligns with gender identity) and "transgender" (when it doesn't).

Sexually Attracted to... and/or (a/o)



Romantically Attracted to...



Why We Ask

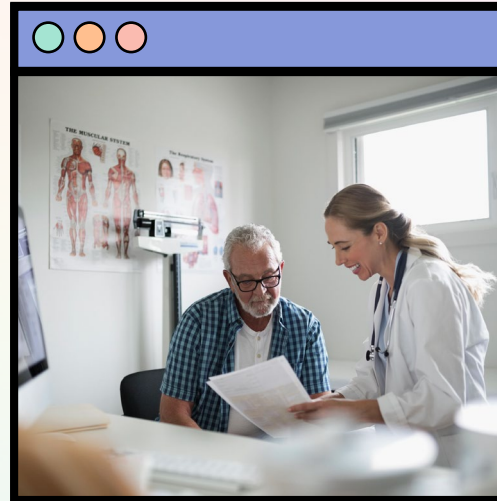
SOGIE and Health

SOGIE Impacts...



Language

The words we are familiar with and choose to use when speaking with someone



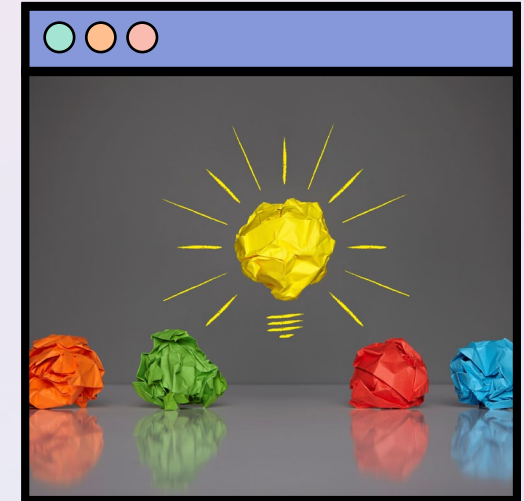
Healthcare

The screenings, treatments, behaviours, and risks providers discuss with patients



Family

Family planning, biological and chosen families, and traumatic experiences

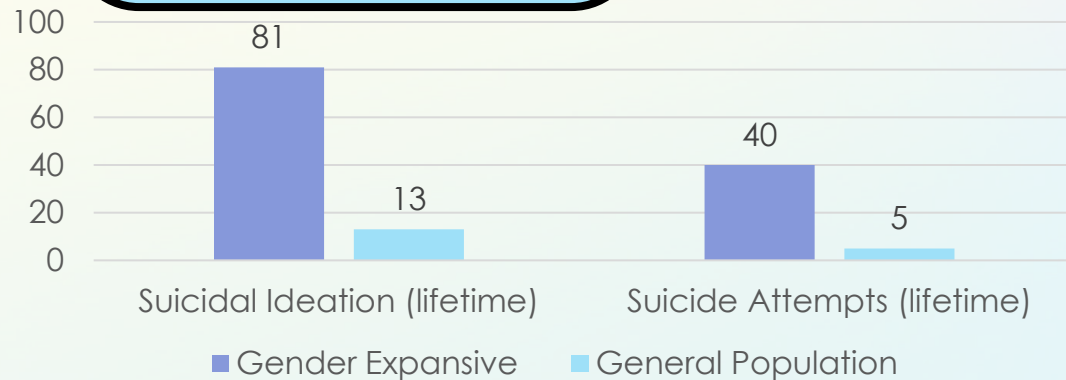


Perspective

The way we see the world, interpret stimuli, respond to stress, prioritize, etc.

Health Disparities

Suicidality



Mental Health

- Up to 85% of Transgender, Nonbinary, and other Gender Expansive people experienced clinically significant levels of depression in the last year
- Up to 70% of Transgender, Nonbinary, and other Gender Expansive people experienced clinically significant levels of anxiety in the last year
- Gender Expansive persons are 3-7x more likely to be neurodivergent than the general population

Chronic Disease

- Gender Expansive persons are 3-7x more likely to experience chronic diseases like diabetes, heart disease, obesity, and stroke compared to the general population
- More than 25% of gender expansive persons report delaying or avoiding medical care due to discrimination

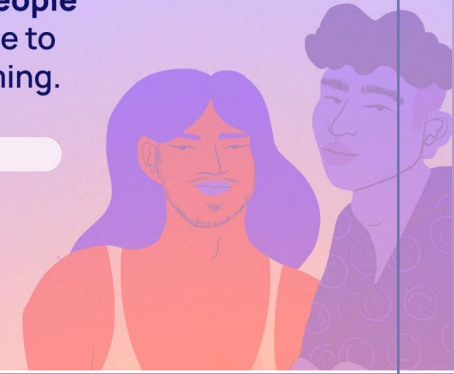
Trevor Project Survey 2023

The Trevor Project hosts an annual mental health survey for LGBTQ+ youth every year. Here are a few of the key findings from the national sample.

41% of LGBTQ young people seriously considered attempting suicide in the past year — and young people who are transgender, nonbinary, and/or people of color reported higher rates than their peers.



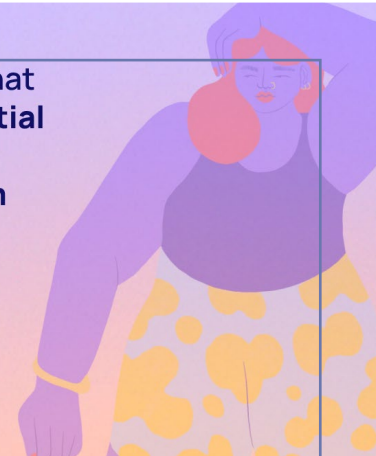
Fewer than 40% of LGBTQ young people found their home to be LGBTQ-affirming.



Nearly 1 in 3 LGBTQ young people said their mental health was poor most of the time or always due to anti-LGBTQ policies and legislation.



Nearly 2 in 3 LGBTQ young people said that hearing about potential state or local laws banning people from discussing LGBTQ people at school made their mental health a lot worse.








Language


Terminology to Understand



LANGUAGE: Gender Identity

Term	Definition	Use / Context
Transgender (adj) Abbreviated as: trans	 Describes a person who does not wholly identify with the gender they were assigned at birth	"Quinten is a <i>transgender</i> man" NOT "Quinten is transgender <u>e</u> d" NOT "Quinten is <u>a</u> transgender"
Cisgender (adj) Abbreviated as: cis	Describes a person who DOES fully identify with the gender they were assigned at birth	"About 97% of the world identifies as cisgender"
Binary (adj)	Describes something as one of two opposite categories, in this case male versus female	"Jayden is a binary trans man"
Nonbinary (adj)	 Describes someone who does not identify with a strictly male or female identity	"Aaron identifies as nonbinary. They are neither a man nor a woman"
Transition (n, v)	 The process (or act) of affirming one's true gender identity, usually by coming out and changing things socially, medically, or legally	Many trans people are forced to, or choose to, stay in the closet because their environment is not safe to transition
Bigender (adj)	Describes a person who identifies with two genders	Emery identifies as bigender. They are both a woman and nonbinary.
Pangender (adj)	Describes a person who identifies with many or all genders, sometimes simultaneously and sometimes across time/setting	Gaylen identifies as pangender. They experience the world through many gendered lenses.
Two Spirit (adj)	Describes a Native American or other indigenous person who experiences gender in a non-Western context; often adopts both masculine and feminine roles and expressions	Many (but not all) Native American tribes use the term Two Spirit to refer to both gender and sexuality that is understood to be queer in a non-Western context.
Gender Queer (adj)	Describes a person who (usually purposefully) subverts gender expectations, roles, etc.	Some gender queer folks mix masculine and feminine roles and expressions to subvert expectations around gender
Gender Fluid (adj)	Describes a person whose gender identity changes over time, within a specific expected set of identities	Damien identifies as genderfluid, they have been leaning into their masculinity this month and have started using they/he pronouns.
Intersex (adj)	Describes a person with sex characteristics that are not typically associated with solely the male or female sex	Some intersex people have mixed genital anatomy, some have chromosomal differences, and some have hormonal differences!
Misgender (v)	The action of incorrectly gendering someone; can refer to incorrect use of pronouns, gendered descriptors, or other terms	It is very painful to be misgendered and happens many times per day to most trans folx, especially when they first come out
Gender Expansive (adj)	Describes a person or gender identity that is not easily described using current terminology, usually refers to persons with visibly queer gender expression in combination with a nonbinary or trans gender identity	The term gender expansive seems to be replacing gender non-conforming in most queer spaces, as it is less stigmatizing. It's also quite common to see used in reference to queer youth who've not yet chosen a specific identity label

Language: Sexual Orientation

Sexuality	Definition	Pride Flag
Gay, MSM/MLM	A person who identifies as male who is interested primarily or solely in partners who also identify as male	 
Lesbian, WSW/WLW	A person who identifies as female who is interested primarily or solely in partners who also identify as female	
Pansexual, Bisexual	A person who is interested both in partners whose gender is similar to their own as well as partners whose gender is different from their own; "hearts not parts"	 
Queer (Sometimes: Gay)	A catch all term for someone who is not heterosexual/straight . Each person will likely have a slightly different meaning for this word	 
Asexual, Ace (Sometimes: Ace Spectrum)	Someone who does not experience, or rarely experiences, sexual attraction to others. Does not dictate sexual behaviour or romantic experiences	
Aromantic	Someone who does not experience, or rarely experiences, romantic attraction to others. Does not dictate romantic behaviour or sexual experiences	
Demisexual, Demi	A part of the Ace Spectrum; indicates someone who must have a deep, intimate, emotional bond with someone before feeling any sexual attraction to them	
Polyamorous, Poly	A person who can hold sexual/romantic feelings for multiple partners at once; OR a relationship style in which multiple partners engage in various forms of ethical non-monogamy with the knowledge and consent of all involved	

How To Ask

Best Practices for Affirming
SOGIE Collection

How To Ask: Name

On a Form

- Name: _____
- Legal Name (if different): _____

We ask for legal name because we must bill insurance using your legal name. You will always be addressed by your affirmed name in the office. You may see both names appear on printed materials and letters from our office*.

What's in a name?

- Patients' affirmed names may not be the same as their legal name. Using the correct name when addressing patients is a key portion of the patient experience.
- Legal names and sexes must be collected and documented for billing purposes, especially regarding submission to health insurance.
- Seeing one's legal name on a document without expecting it can be very jarring and upsetting. It is not always easy to change one's name legally, even if desired. Warn people with affirmed names about where they may see their legal information appear, ahead of time.

Verbal Collection

- New patient over the phone: "I need to collect some details to schedule your new patient appointment. Can you please tell me what name you go by? Thank you. Can you please tell me your legal name? This is collected for billing and documentation purposes only. You will be addressed by your affirmed name in office."
- In the exam room: "Hi, my name is Dr. Frasier and I use they/them pronouns. What would you like me to call you?"

How To Ask

Birth Sex

What sex were you assigned at or near birth? This is most likely the sex listed on your original birth certificate and correlates to your reproductive anatomy present at birth.

- Male
- Female
- Intersex
- Choose not to Disclose

Gender Identity

What is your gender identity? This refers to your internal understanding of your gender and may or may not align with your sex assigned at birth.

- Man (Boy)
- Woman (Girl)
- Transgender Man (Boy)
- Transgender Woman (Girl)
- Nonbinary
- Agender
- Questioning
- Trans/Transgender
- Cultural Gender Identity (e.g. Two-Spirit)
- Gender Fluid
- Gender Queer
- Bigender
- Pangender
- Other: _____
- Choose not to Disclose

Pronouns

What pronouns would you like our staff to use when referring to you?

- He/Him
- She/Her
- They/Them
- She/They
- He/They
- Other: _____
- Choose not to Disclose

Sexual Orientation

What is your sexual orientation? This refers to the types of people you are interested in having sexual or romantic relationships with.

- Straight/Heterosexual
- Gay/Lesbian/Homosexual
- Bisexual, Pansexual, or Polysexual
- Asexual
- Queer
- Questioning
- Other: _____
- Choose not to Disclose

Current Legal Sex

What is your current legal sex? This refers to the sex that is listed on your State ID and Health Insurance Card and is used for billing purposes only.

- M/Male
- F/Female
- X/Nonbinary, Intersex, or Other

How To Ask... Collection Best Practices

Nonhuman Collection

- You can ask for SOGIE data on a form! It is recommended to do this before the appointment on intake documents, either filled out in the waiting room or sent to the patient to fill out electronically at home
- Make sure you have enough information available about the definitions of the words you are asking about, in multiple languages. In person, this might be a "Why We Ask" trifold pamphlet given to all patients with their intake forms. Electronically, this might be a PDF of the same or clickable links with more information.
- Make sure that however you ask, it is clear that the information will be kept private and there is ample detail on access to this data.

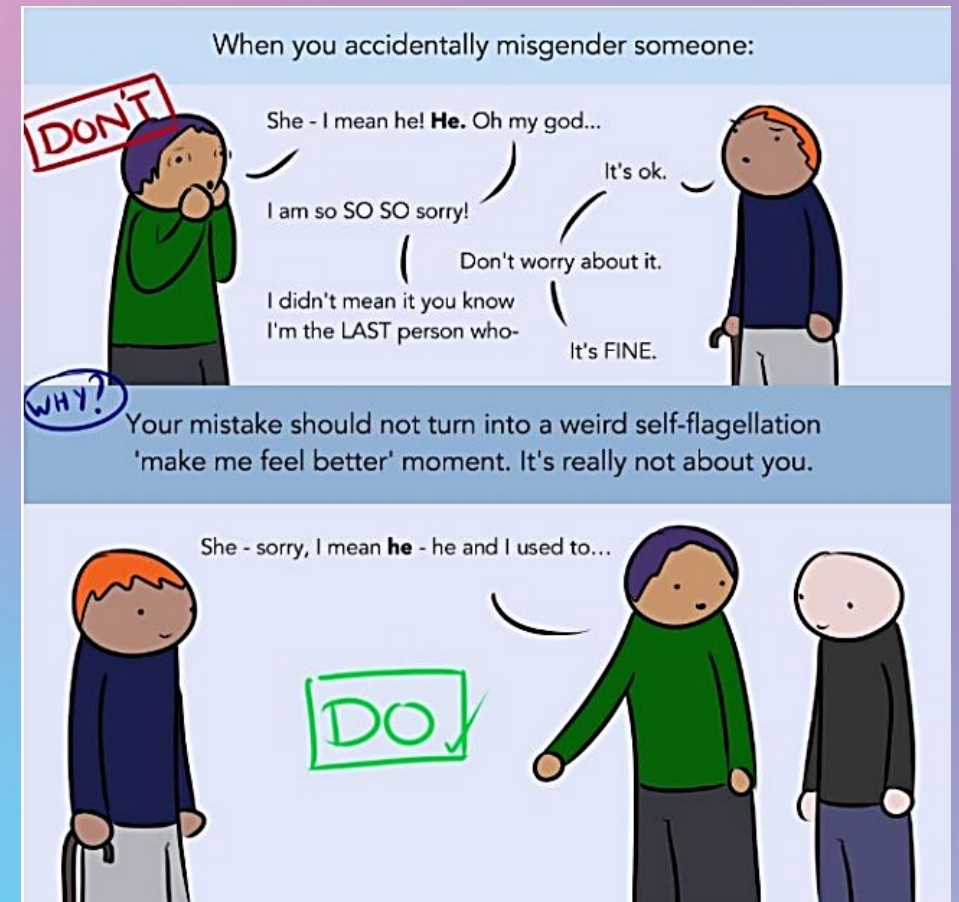
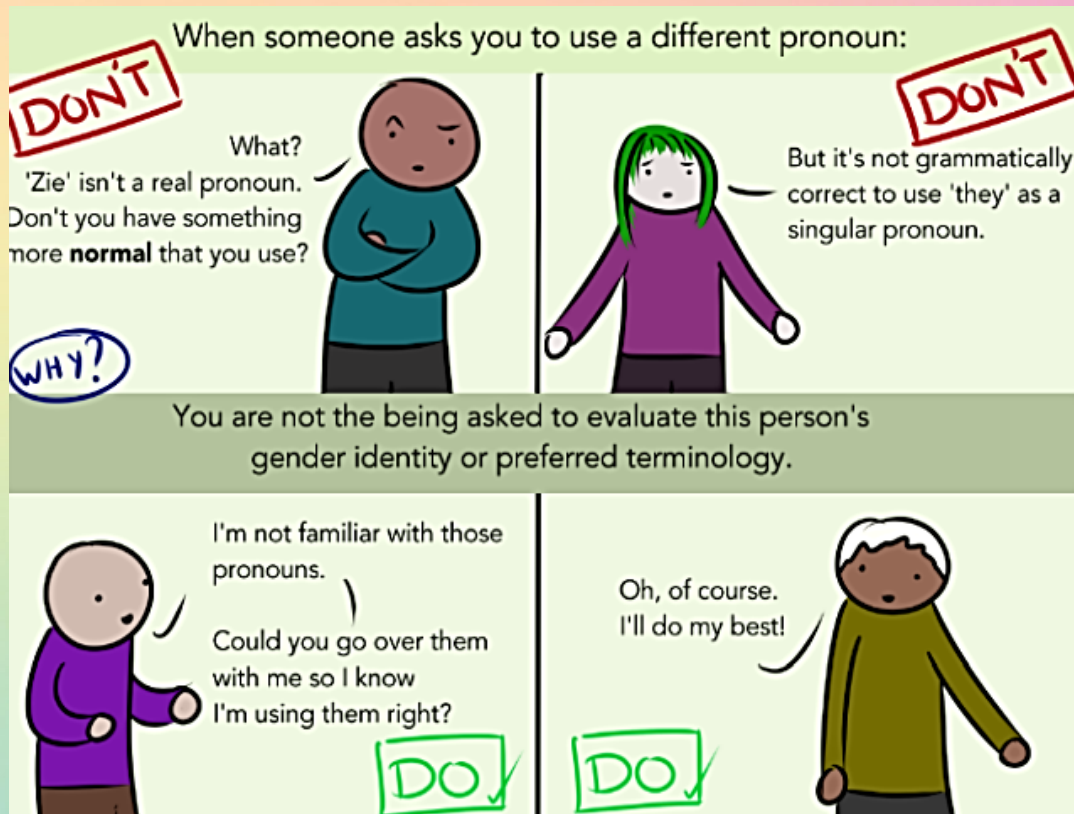
Human Collection

- Start by introducing yourself and sharing your pronouns
- Ask EVERY SINGLE PERSON, at least every six (6) months, beginning by age five **(5) for GI** and at age eleven **(11) for SO²**
- Ask the question open-endedly. If you MUST choose from a drop-down menu and their response is not listed, thank them and then ask whether any of the options are affirming or whether they'd prefer you select "other" or "choose not to disclose"
- Ask in the exam room, not in the waiting room. This should be a *private* conversation with any clinical staff member, not a registration associate.

Troubleshooting

What if...?

OOPS! What happens when...



Troubleshooting SOGIE Collection Issues

Pediatrics

- Best practices include parental completion of the intake form and verbal check in with the child.
- Gender should be asked starting at 3-4 years, and Sexuality at 10 years old, in a developmentally appropriate way².
- Explain the why to both child and parent. Have prepared book recommendations to support further conversation between parent and child.

Teens

- Teens should be asked about SOGIE separate from their parents when possible, starting at age eleven (11)².
- It is important to adhere to the name and pronouns a teen shares, even if the parent is not supportive.
- Explain confidentiality as it relates to their health record and ask permission to document SOGIE.
- Ask about sex and sexuality without making assumptions.

Staff Beliefs

- Staff may need coaching and additional training to collect SOGIE respectfully¹. If a staff member needs supportive coaching, supervisors should take care to reduce the impact of this need on patients however possible.
- Staff should be **required** to respect all SOGIE information and identities at work. Affirming organizations should create policies to enforce this expectation.

Angry Clients

- **Staff mental health is more important than data collection.** Staff should feel supported in dropping the conversation and setting boundaries if they are being verbally abused by a client.
- Explaining “the why” often calms an angry client. “We ask everyone” and “we are required to ask due to funding” and “we want to ensure you are treated with respect” are often enough.

EHR Limits

- All health systems work with an electronic health record, each with its own set of pros and cons. Sometimes best practice response options are not included in your EHR package. Do your best to advocate to the company.
- Use what you have to do the best you can for your clients. Work with an LGBTQIA+ consultant to find work-arounds and next-best options to support your clients.



Resources for Further Learning

1. [Supervisor Guide to Coaching Staff on SOGI Data Collection \(uconn.edu\)](#)
2. [Ready, Set, Go! Guidelines and Tips For Collecting Patient Data on Sexual Orientation and Gender Identity \(SOGI\) – 2022 Update » LGBTQIA+ Health Education Center](#)
3. [Additional Resources | For Health Care Providers | Transforming Health | Clinicians | HIV | CDC](#)
4. [Queer RI](#)
5. <https://www.thetrevorproject.org/>
6. [Understanding Gender Identity | Lifespan](#)
7. <https://medium.com/gender-inclusivit/why-i-put-pronouns-on-my-email-signature-and-linkedin-profile-and-you-should-too-d3dc942c8743>
8. [Health Discrimination and Suicide.pdf](#)
9. [WPATH Standards of Care Version 8](#)
10. <https://lgbtafamilyacceptance.org/>
11. [ID Documents Center | National Center for Transgender Equality \(transequality.org\)](#)
12. [Trans Youth Matter Toolkit - Fenway Health: Health Care Is A Right, Not A Privilege.](#)
13. [Webinar Archives » LGBTQIA+ Health Education Center](#)
14. [RESOURCES \(lgbtqequity.org\)](#)
15. [LGBTQ+ Mental Health: What You Need To Know | McLean Hospital](#)
16. [How Clinicians and Providers Can Support Gender-Affirming Care \(nichq.org\)](#)
17. [Gender-Affirming Psychiatric Care: 9781615374724: Medicine & Health Science Books @ Amazon.com](#)
18. [How do I use they/them pronouns in Spanish? • The Nonbinary Connection](#)
19. [Medical Care of Trans and Gender Diverse Adults » LGBTQIA+ Health Education Center](#)
20. [Affirmative Services for Transgender and Gender Diverse People - Best Practices for Frontline Health Care Staff » LGBTQIA+ Health Education Center](#)



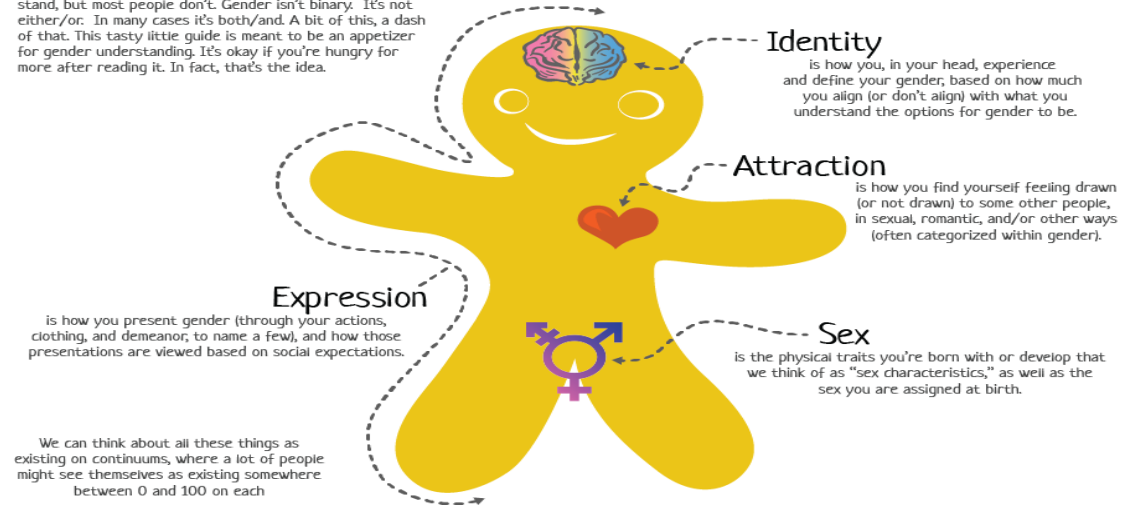
Key Take-Aways

1. **Don't make assumptions!** Ask EVERYONE about SOGIE.
2. **Accept corrections** with grace.
3. Be cognizant of privacy and **safety**.
4. **Create affirming policies** at the organizational level to support LGBTQIA+ clients and staff, that **reinforce expectations of respect and cultural humility**.

The Genderbread Person

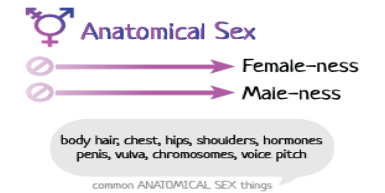
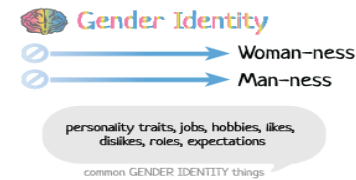
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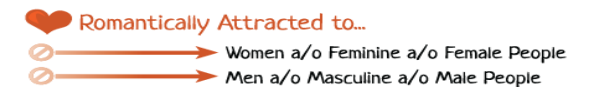
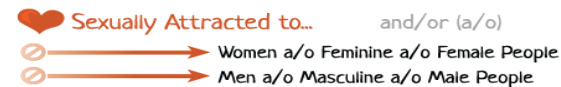
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Thank you!

**What
Questions do
you have?**

