

Sexuality and Gender Identity in Smart Chart

REVIEWED: 04/2019, 06/2018

OVERVIEW: Accurately document the patient's gender identity in Smart Chart.

AUTHOR: Ambulatory Clinical Informatics Team

APPLICATIONS IMPACTED: EpicCare

DETAILS: By consistently asking patients about their sexual orientation, gender identity, and sex assigned at birth and clearly recording this information in Smart Chart, we can help our patients with diverse sexual orientations and gender identities feel more comfortable and give providers more information on which to base clinical decisions. Standard ways to document medical histories for transgender, intersex and non-binary patients can prevent clinically relevant information from being overlooked and helps clinicians provide care tailored to patients' unique needs.

Gender Identity – Patient Preferred Name

- 1. While in the patient's chart, navigate to the Demographics activity. From the Contact Information section, click on the Name Edit icon.
- 2. Enter the Patient Preferred name in the Name Edit window and click Accept. Navigate away from the Demographics section. The patient's preferred name is now visible on the Patient Header. See Preferred Patient Name tip sheet for more information.
- 3. The Patient Preferred Name could be added to the Multi Provider Schedule (personal schedule). See Configure Your Personal Schedule Tip Sheet for more information.

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36 year old, 12/7/1982

Gender: Male, Not Documented

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Appt Time Status	Patient Name	Pref Name	Pt. Portal Status	MRN	HM/MCR D Orders (A
7:30 AM Sch	Acanthite, Rosie	Jason	Inactive	4462	HM
8:00 AM Exam-Rm	Acanthite, Harold		Declined	4462	Ê





MRN: 3502629

Pt Rmndr List: None +

MyChart: Active, 08/09/16

4. The Patient Preferred Name can be added to the columns of the custom created Patient Lists (not yet available on system Patient Lists). See Patient Lists: Create and Share tip sheet for more information.

Access the Gender Identity **Smart Form**

- 1. From an encounter, all providers (except ED providers) and all Ambulatory users can access the Sexuality and Gender Identity Smart Form: More > SmartForms > Sexuality and Gender Identity.
 - Consider adding to your list of encounter activities by clicking on the star next to it.



- 2. For ED Providers, the Sexuality and Gender Identity Smart Form is available as an activity in the lower left corner of your screen.
- 3. ED Nurses may review the Sexuality and Gender Identity documentation in their Triage Navigator in the "Screening" section.

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Advance Dire	Sepsis Report
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Sexuality and Gender Identity Smart Form

- 1. The Smart Form can collect values for three new Sex Fields
 - Gender Identity
 - **Sexual Orientation** •
 - Sex Assigned at Birth
- 2. Hover over button selections for definitions.
- 3. The Sexuality and Gender Identity Smart Form retains selections made and can be changed the next time form is accessed.
- 4. The provider fills out the Smart Form by clicking and making the appropriate selections.

Selection chosen within the Patient's Pronouns Field will not change other areas of the chart. For example, the pronoun selected will not change anything in the documentation completed in

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Gende	r identity:		9

Viewing SmartForm Reports

- Once populated, the Sexuality and Gender Identity SmartForm will be available for review in the Reports Section of the History Activity excluding ED areas.
 - Updates to the form will have to be completed within the Gender Identity activity.

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Chart Review	Surgical					_
Results Revi	Family		1. C			
Problem List	SOCIAL	••• Aurora Healt	n Care			
History	Substance & Sex					
Review Flows	Socioeconomic		Aurora I	nternal Medicine-Good	Норе	
Graphs	ADL		, i	VILWAUKEE WI 53209		
Flowsheets	Social Documenta			Phone: 414-352-3100		
MyChart Res	SPECIALTY	Patient Information				
Patient Mess	Birth	Patient Name Aardvark Ben	Sex Male	DOB 7/8/1977	SSN xxx-xx-9696	
WIR	REPORTS	Autoria, ben	marc	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	AAA AA 3030	
Lettere	Family	Patient Demographics				
Leuers	Social	Address		Phone		
Allergies	Specialty	JANESVILLE WI 53545		608-654-8881 (Work)		
Medications	Sexuality and Ge			608-340-2970 (Mobile)	*Preferred*	
Order Entry						
Immunizations		sexuality and Gender Identity				
		Patient's sex assigned at birth: Male				
Visit Navigator		Patient's sexual orientation: Lesbian or Gay				
Sexuality and		Gender Identity				
		Patient's pronouns: he/him/his				
& Customize		Organ Inventory				

2. A read-only version of the SmartForm can also be found in Chart Review by locating the date/encounter the information was added and then clicking on the hyperlink to view the report.

$\bullet \bullet \bullet$	Report Viewer
SnapShot	 Report History View pane 1 View pane 2 Split Up/Down Split Left/Right
Demographics	103/13/2019 Office Visit FamilyPrac - Provider, T
Chart Review	
Results Review	
Letters	Office Visit Open
History	Test Provider
Review Flows	Internal Medicine
Flowsheets	Encounter Notes
MyChart Resul	All notes
Patient Messa	Instructions
MIR	
Allergies	Continue current medication regimen.
Medications	
mmunizations	Additional Documentation
	SmartForms: CAHC SEXUALITY AND GENDER IDENTITY
Anticoagulation	Encounter Info: Billing Info, History, Allergies, Detailed Report
Enter/Edit Res	,

Additional Tools

 The Smart Form information can be pulled into the Progress Notes section by using the SmartPhrase .GENDERID.



Additional Information

- Clinicians or billing staff can continue to add appropriate modifiers/condition codes to the services rendered which indicates they are medically necessary as justified by documentation in the patient's medical record.
 - KX modifier (Ambulatory) and Condition Code 45 (Inpatient)
- Information collected in the Gender Identity SmartForm is considered confidential and should be gathered in a private, one-on-one patient setting. During the screening process, please share with patients that the information is confidential.

No otherwise qualified applicant for service or service participant shall be excluded from participation, be denied benefits, or otherwise be subject to discrimination in any manner on the basis of race, color, national origin or ancestry, sex, sexual orientation, gender identity, religion, age, political belief or affiliation, disability or association with a person with a disability. This policy covers eligibility for the access to service delivery and treatment in all of the programs and activities. Additional resources can be found on the Diversity & Inclusion Caregiver Connect Page.