



Practical tips to
make your
Electronic Health
Records more
inclusive of
2SLGBTQ people

Rainbow Health Ontario, a program of Sherbourne Health, created this brief guide in response to the many requests we receive for guidance on incorporating sexual orientation and gender identity into intake forms and Electronic Health Records (EHRs). Developing and implementing inclusive EHRs is essential to creating accessible, welcoming clinical settings where 2SLGBTQ patients feel encouraged to participate in their own health care.

Why use inclusive health care records?

Using health records and forms that affirm 2SLGBTQ identities can increase patient confidence and comfort with a provider. This can promote health care access, as avoidance of care is a common barrier for 2SLGBTQ individuals, frequently caused by prior experiences of stigma and discrimination. Inclusive forms are also helpful for sharing relevant information consistently among a care team, resulting in more appropriate screening, assessment, and treatment. Broadly, the practice of inclusive EHRs can serve as a tool for health equity for researchers, due to their efficiency in documenting health disparities and barriers in systems.

One challenge we all face is that words representing different gender identities and sexual orientations continue to evolve. Changes made to an EHR today may not be current in a few years. For instance, the Trevor Project (2019) released a report surveying over 34,000 2SLGBTQ youth and found that participants identified over 100 gender identities, and more than 100 sexual orientations. Additionally, it's important to keep in mind that service users' gender identities and sexual orientations may change over their lifetime. Be sure to visit the additional resources at the end of this document for more information, including those that cover creating inclusive EHRs specifically for transgender and non-binary patients.

INTAKE FORMS

We recommend the following suggested fields be included in intake forms, in this order:

1. Legal full name: _____
2. Name you go by: _____
3. Pronouns (how you want others to refer to you, such as she, he, they, etc.):
4. Please tell us your gender identity, if you are comfortable disclosing (e.g., female, non-binary, male, trans, genderqueer, etc.)

[include a section here where people can use as many words as they wish]

5. Sex assigned at birth (circle one):

Female / Male / Intersex / Do not wish to disclose

6. Please tell us your sexual orientation, if you are comfortable disclosing (e.g., lesbian, bisexual, heterosexual, gay, etc.)

[include a section here where people can use as many words as they wish]

ADDITIONAL TIPS FOR INCLUSIVE RECORDS

It is important that the information collected is kept confidential and used appropriately.

This means that *every* staff member would refer to the patient by the name and pronoun they go by.

It is not enough just to change the EHR's intake form.

Staff must be trained on how to confidently and respectfully ask the questions—if they are typing into the EHR—or how to accurately input the data if the patient is filling out a paper form. All staff should also understand the differences between sex and gender, and respecting sexual and gender diversity. If a mistake is made, apologize sincerely once, commit to doing better next time, and move on. Consider offering training for providers and clinic workers, like [2SLGBTQ Foundations from Rainbow Health Ontario](#).

You should only collect data that is essential to providing services.

If there is no medical need to collect the data, then do not collect it. If you are planning to purchase new EMR software, you can request all of your required fields and tailor the software to be inclusive of the diverse patient populations the health care organization serves.

REFERENCES & ADDITIONAL RESOURCES

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