

Practical Strategies for More 2SLGBTQ+ Inclusive Electronic Health Records



EQUITY IN PRACTICE GUIDE

Rainbow Health Ontario 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 healthcare. Using health records and forms that affirm 2SLGBTQ+ identities can increase patient confidence and comfort with a provider. This can promote **healthcare access**, as avoidance of care is a common barrier for 2SLGBTQ+ individuals, frequently caused by prior experiences of stigma and discrimination.

Inclusive records can **enhance quality of care** and decrease the likelihood of negative outcomes. They also help care teams share relevant information consistently, resulting in more appropriate screening, assessment and treatment. Broadly, inclusive EHRs serve as a tool for **health equity**, helping researchers document disparities and systemic barriers.

We understand that software changes can be challenging, depending on program flexibility and available funds. We also recognize that language for gender identities and sexual orientations continues to evolve. Changes made to EHRs today may become outdated. For instance, The Trevor Project's 2019 report with 34,000 2SLGBTQ+ youth participants identified

over 100 gender identities and more than 100 sexual orientations. Additionally, it's important to recognize that service users' gender identities and sexual orientations may change over time. For more detailed guidance - including how to create inclusive EHRs specifically for transgender and non-binary patients - please refer to the additional resources at the end of this document.

INTAKE FORMS

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

1. Legal name (as appears on OHIP card)
2. Name you go by
3. Pronouns (How do you want others to refer to you? e.g., she/her, he/him, they/them)
4. Please tell us your gender identity, if you are comfortable disclosing (e.g., woman, man, transgender, non-binary, etc.)

Use open text fields (not dropdown menus) so patients can self-identify.

5. Sex assigned at birth
Options: female, male, intersex, prefer not to disclose (circle one)
6. Please tell us your sexual orientation, if you are comfortable disclosing (e.g., gay, lesbian, bisexual, heterosexual, etc.)

Use open text fields (not dropdown menus) so patients can self-identify.

ADDITIONAL TIPS FOR INCLUSIVE RECORDS

It's important that all collected information remains confidential and is used appropriately.

This includes ensuring that every staff member refers to patients by the names and pronouns they use.

Updating the intake form in the electronic health record (EHR) system is not enough.

Staff must be trained to confidently and respectfully ask these questions if they're entering information into the EHR, or to accurately input the data if a patient fills out a paper form. If a mistake is made, offer a sincere apology once, commit to doing better and move on.

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.

RESOURCES

A.B. et al. (2022) *Experiences of Transgender People Reviewing Their Electronic Health Records, a Qualitative Study*. <https://pubmed.ncbi.nlm.nih.gov/31258320/>

Burgess et al. (2019). *Evolving Sex and Gender in Electronic Health Records*. <https://pubmed.ncbi.nlm.nih.gov/31258320/>

Deutsch, M., Buchholz, D. (2015). Electronic Health Records and Transgender Patients-Practical Recommendations for the Collection of Gender Identity Data. <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4441683/>

Deutsch et al. (2013). Electronic records and the transgender patient: recommendations from the World Professional Transgender Health EMR Working Group. <https://academic.oup.com/jamia/article/20/4/700/2909343>

Grasso et al. (2022). Using sexual orientation and gender identity data in electronic health records to assess for disparities in preventive health screening services. <https://doi.org/10.1016/j.ijmedinf.2020.104245>

Keuroghlian, A.S. Electronic health records as an equity tool for LGBTQIA+ people. <https://doi.org/10.1038/s41591-021-01592-3>

The Trevor Project. (2019). *National Survey on LGBTQ Mental Health*. New York. New York: The Trevor Project. <https://www.thetrevorproject.org/survey-2019/?section=Methodology>



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Advancing a future where all 2SLGBTQ+ people can access inclusive, affirming care by training providers, developing resources, and shaping public policy.