

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.



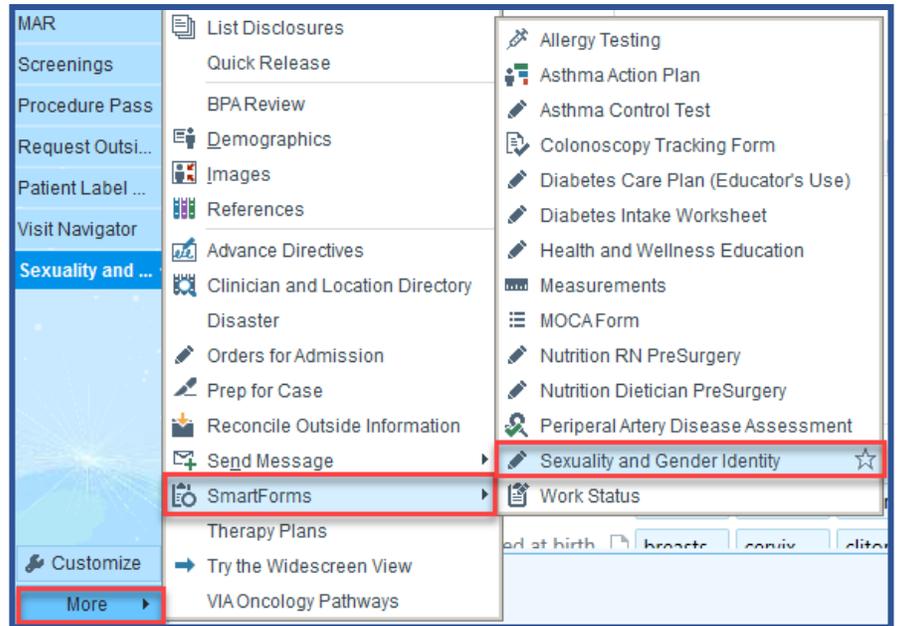
3. The Patient Preferred Name could be added to the Multi Provider Schedule (personal schedule). See [Configure Your Personal Schedule](#) Tip Sheet for more information.

GRAEMITE, FINN			Total: 7 Auto-refreshed: 1:39 PM			
Appt Time	Status	Patient Name	Pref Name	Pt. Portal Status	MRN	HM/MCR D Orders (/)
7:30 AM	Sch	Acanthite, Rosie	Jason	Inactive	4462...	HM
8:00 AM	Exam-Rm	Acanthite, Harold		Declined	4462...	

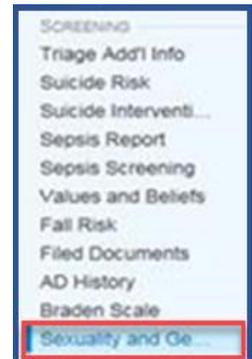
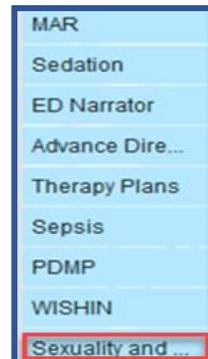
- The Patient Preferred Name can be added to the columns of the custom created Patient Lists (not yet available on system Patient Lists). See [Patient Lists: Create and Share](#) tip sheet for more information.

Access the Gender Identity Smart Form

- 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.



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



Sexuality and Gender Identity Smart Form

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

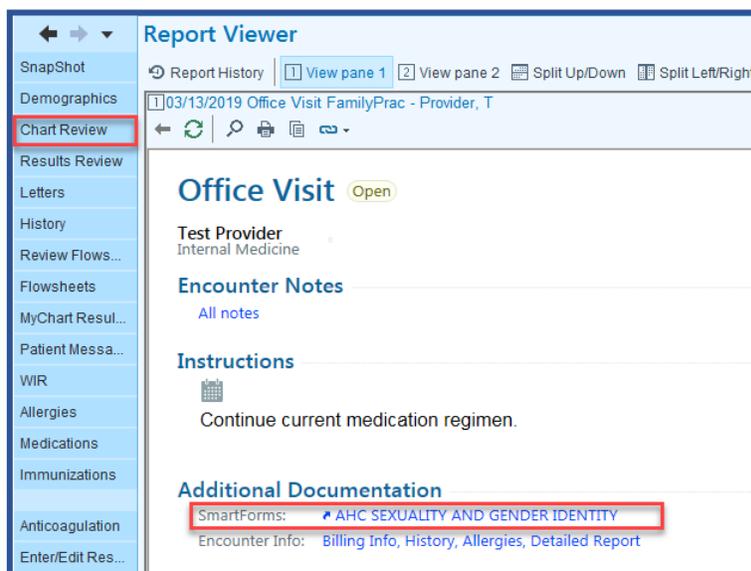
- Selection chosen within the Patient's Pronouns Field will not change other areas of the chart. For example, the pronoun selected will not change anything in the documentation completed in the Progress Note section.

- After selecting some buttons, a comment text box may open to allow for additional documentation. For example: Under Patient's sexual orientation, clicking on "Something else" will open a free-text comment box to document further explanation.

Viewing SmartForm Reports

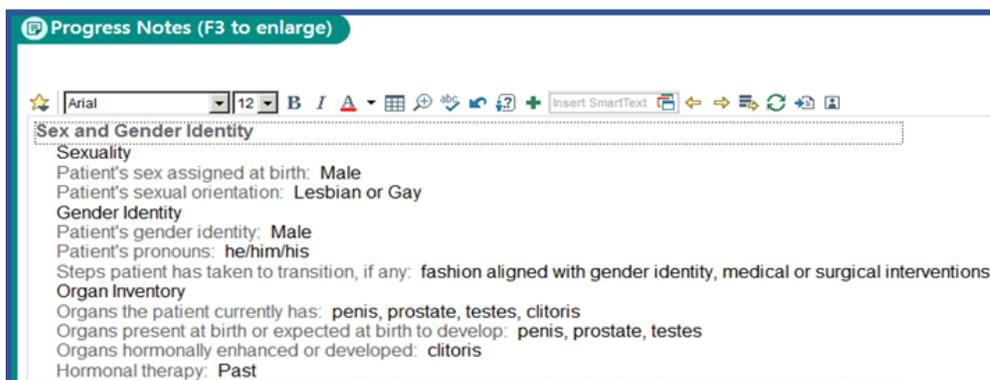
- Once populated, the Sexuality and Gender Identity SmartForm will be available for review in the Reports Section of the History Activity excluding ED areas.
 - Updates to the form will have to be completed within the Gender Identity activity.

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.



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](#).