Gender Identity:
MiChart Changes with October Upgrade

ACU Operations 8/1 and 8/8
Agenda

• Background
• MiChart Changes with October Upgrade
  – New Gender Identity Form
  – Header to include gender identity
  – Smartlink changes
• Future Changes
• Ongoing Challenges
Prohibits discrimination on the basis of race, color, national origin, \textbf{sex}, age or disability in certain health programs and activities.

\textbf{Sex discrimination} includes, but is not limited to, discrimination based on an individual’s sex, including pregnancy, related to medical conditions, gender identity and sex stereotypes.

- \textbf{Gender identity}: an individual’s internal sense of gender, which may be male, female, neither, or a combination of male and female.

- \textbf{Sex stereotypes}: stereotypical notions of masculinity or femininity.
• Building on existing models of patient centered care and culture of inclusivity
  – Michigan Medicine must treat individuals consistent with their gender identity
• Policies for overarching nondiscrimination, grievance procedures, etc. in draft phase
  – Target date: Fall 2017
MiChart Changes with October Upgrade

- New Gender Identity Form
  - Replacing homegrown form
  - Newly available portal questionnaire
  - Will assist in future reporting requirements
- Header to include gender identity
  - Easier way to be respectful of patient
  - Trigger to look at gender identity form
- Smartlink changes
  - Patient pronoun and preferred name to change how they are addressed on all correspondence
  - Patient education important
### Gender Identity

<table>
<thead>
<tr>
<th>Patient's gender identity:</th>
<th>Woman or Girl</th>
<th>Man or Boy</th>
<th>Trans Woman</th>
<th>Trans Man</th>
<th>Other</th>
<th>Choose not to disclose</th>
<th>Genderqueer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Two-Spirit</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nonbinary</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gender identity:</th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Patient's sex assigned at birth:</th>
<th>Female</th>
<th>Male</th>
<th>Unknown</th>
<th>Not recorded on birth certificate</th>
<th>Choose not to disclose</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Uncertain</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Intersex</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Patient's pronouns:</th>
<th>she/her/hers</th>
<th>he/him/his</th>
<th>they/them/theirs</th>
<th>patient's name</th>
<th>decline to answer</th>
<th>other</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Pronoun</th>
<th></th>
</tr>
</thead>
</table>

***Please check header to see if patient's preferred name has been documented. If not, please ask patient for their preferred name and document in the Demographics activity.***

### Patient's future plans to transition, if any:

- presentation aligned with gender identity
- preferred name aligned with gender identity
- legal name aligned with gender identity
- legal sex aligned with gender identity
- medical or surgical interventions

### Hormone Therapy:

- Cross-sex hormone therapy, current user
- Cross-sex hormone therapy, past user

### Organ Inventory

<table>
<thead>
<tr>
<th>Organs the patient currently has:</th>
<th>breasts</th>
<th>cervix</th>
<th>ovaries</th>
<th>uterus</th>
<th>vagina</th>
<th>penis</th>
<th>prostate</th>
<th>testes</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Organs present at birth or expected at birth to develop:</th>
<th>same as current organs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>breasts</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Organs hormonally enhanced or developed:</th>
<th>breasts</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Organs surgically enhanced or constructed:</th>
<th>breasts</th>
<th>vagina</th>
<th>penis</th>
</tr>
</thead>
</table>

### Therapist Information

<table>
<thead>
<tr>
<th>Therapist name:</th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Therapist phone number:</th>
<th></th>
</tr>
</thead>
</table>

### Sexuality

<table>
<thead>
<tr>
<th>Patient's sexual orientation:</th>
<th>Lesbian or Gay</th>
<th>Straight (not lesbian or gay)</th>
<th>Bisexual</th>
<th>Something else</th>
<th>Don't know</th>
<th>Choose not to disclose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pansexual</td>
<td></td>
<td></td>
<td>Asexual</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sexual orientation:</th>
<th></th>
</tr>
</thead>
</table>
Tip Sheet

• LINK
• How to Access
• Terms and Concepts, for example:
  – Gender identity
  – Transgender
  – Transition
• Problematic Terminology
• Tips for Interaction, for example:
  – How to use patient pronoun
  – What to say if you use incorrect name
• Additional resources
MiChart Changes with October Upgrade

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  – Trigger to look at gender identity form

• Smartlink changes
  – Patient pronoun and preferred name to change how they are addressed on all correspondence
  – Patient education important
Ambulatory Header to Include Gender Identity

- Will be added in same place as Pronoun
- Hover to view more information
- Some headers may not include Pronoun or Gender Identity:
  - ADT/Cadence
  - HOD
  - Inpatient
Staff education to look at preferred name below
– More visible with the upgrade
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Smartlink Changes

• Patient pronoun and preferred name to change on correspondence, for example:
  – After visit summary
  – Letters (to employer or home)
  – Address label
  – Progress notes

• Notification will be pushed to portal active patients that have specified a gender identity

• Smartlink available to pull patient legal name
  – .NAMELEGAL
  – .FNAMELEGAL
• **Problem**: A patient identifies with one pronoun or requests a preferred name, but their family or employer do not know them by that pronoun or name.

• **Solution**: Inform patient that updating pronoun will change how they are addressed in written correspondence and ensure that they are comfortable with that change.

• **Scripting** when patient requests to change pronoun: Updating your pronoun will help our staff address you in the right way. It will also update how we address you in writing, for example in a letter to your home. Is it okay for us to address you with this pronoun in all situations?
Future Changes

• Header consistency
• Updating Demographics section
  – Include sex at birth and gender identity
  – Train staff not to ask these questions to each patient but have a place to document if patient discloses information
  – Target date: TBD
• Gender Identity training modules
Ongoing Challenges

• Printed stickers in clinic utilize legal name
• Ancillary services using legal name
  – Patient education on using MRN
## Old form

### Pronoun Preference will appear in the patient header.

**Gender Identity**
- Man
- Trans Man
- Boy
- Genderqueer
- Nonbinary
- Woman
- Trans Woman
- Girl
- Two-Spirit
- See Comments

**Pronoun Preference**
- He
- She
- They
- See Comments

### Information in this column will not appear in the patient header

**Sex at birth**
- Male
- Female
- Intersex

**Medical and Surgical Treatments**
- No medical or surgical treatments
- Cross-sex hormone therapy, current user
- Cross-sex hormone therapy, past user
- Bilateral total reduction mammoplasty
- Hysterectomy
- Oophorectomy
- Salpingectomy
- Vaginectomy
- Phalloplasty, free flap
- Metoidioplasty
- Urethroplasty
- Scrotoplasty
- Reduction thyroid chondroplasty
- Laryngeal feminization surgery
- Voice surgery
- Scalp advancement
- Forehead reconstruction
- Soft tissue filler injections
- Breast augmentation
- Bilateral orchiectomy
- Penectomy
- Vaginoplasty, penile inversion
- Vaginoplasty, colon graft
- Other unlisted surgical procedure
Service Areas Using Legal Name

- **Problem**: Some Michigan Medicine service areas have software and workflows that do not address patient by preferred name. Patients may be upset that they requested to be called by a preferred name, but these areas do not recognize that.

- **Solution**: Inform patient that they might be called by the incorrect name when visiting these areas. Explain other ways they can identify themselves, for example, MRN.

- **Scripting**: There is an issue with our computer system which allows for some departments to only view your legal name. This means they will only see your legal name when you check-in and when they print off documents. I’d like to give you your Medical Record Number (MRN) so they can look you up that way. Don’t be alarmed if you see your legal name on any printed items. Please know we are working on correcting this issue.
• **Problem:** Preferred name does not show up in patient selection box, however is shown below in the patient result screenshot.

• **Solution:** Review patient snapshot for preferred name. *Note: Do not ask patient if they could be listed under a different name without first looking at preferred name.*