

**Learn More:
Sexual Orientation
and Gender Identity
(SOGI)**

UWHealth

uwhealth.org

Introduction

UW Health is committed to being a diverse and inclusive environment for patients, visitors, providers and staff. We acknowledge that each person has a sexual orientation and gender identity (SOGI).

As part of our commitment, we implement policies that keep us informed, aware and sensitive to our patients’ needs and personal identities. We have been recognized by the Human Rights Campaign as a Leader in LGBTQ Healthcare Equality and will continue to follow best practices to ensure we remain an inclusive and equitable healthcare environment. Accurate documentation improves the health of all patients, regardless of gender identity or sexual orientation.

This document provides information about your options to include your sexual orientation and gender identity in our electronic health records system. It is specifically focused on helping you understand what information we may collect with your permission, as well as the details about who may view SOGI information and how SOGI information may be used. This document also includes terminology and definitions, to clarify the meaning of certain words used that may or may not be familiar to you.

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Resources

UW Health Gender Services Program: uwhealth.org/GenderServices
Patient Rights and Responsibilities: uwhealth.org/PatientRights

Terminology

Please take a moment to review this terminology before continuing through the rest of the document. Using shared terminology helps to eliminate communication barriers.

Gender Identity: Your internal sense of yourself as a woman, a man, nonbinary, genderqueer, agender, or one or more other genders.

Legal Name: The name that is used for legal and insurance purposes. This name might or might not be the same as your preferred name.

Legal Sex: The gender/sex label(s) that are used in legal contexts, such as on your identity documents, medical record and health insurance. Some people may change the sex/gender on some or all of their legal documents to better align with their gender identity. If you do change the legal sex on your health record, it is still important that your medical provider be aware of your sex assigned at birth, as this information is pertinent to your care.

Preferred: The word “preferred” appears in some of the following terms. This is the language used in our electronic health records system. Our policy is that UW Health staff will use the name and pronouns that you wish us to use—the “Preferred Name” and “Preferred Pronouns” in your health record—when we communicate with you, whether verbally or written, and when we refer to you in conversations about your care when you are not present.

Preferred Name: The name that you want UW Health staff to call you, regardless of your legal name. For example, you might use a variation of your legal first name, a nickname, your middle name or an entirely different name. If you do not indicate a preferred name, your legal first name is used.

Preferred Pronouns: Pronouns are the words that you want UW Health staff to use when referring to you when not using your name. For example: she/her/hers, he/him/his or they/them/theirs.

Sex Assigned at Birth: People are typically assigned a label as either “male” or “female” by a medical professional at their time of birth, generally based on the appearance of their genitals. This is then recorded on the birth certificate, as well as other legal and medical documents throughout each person’s life. Some people may follow the legal processes to change the gender/sex labels on these documents to better align with their gender identity.

Sexual Orientation: How you characterize your sexual and emotional attraction to others.

SOGI: An acronym for Sexual Orientation and Gender Identity. In our electronic health records system, your SOGI information consists of your legal name, preferred name, preferred pronouns, legal sex, sex assigned at birth, sexual orientation and gender identity.

Am I Required to Answer the SOGI Questions?

You are not required to share anything you don't want to share. You can provide whatever information you feel comfortable sharing with us.

PRONOUNS WE WILL USE IN LETTERS WE SEND YOU	
Gender Identity	Pronouns Used in Letters (default)
Choose not to disclose	Preferred name and last name
Female	She/Her/Hers
Male	He/Him/His
Other	Preferred name and last name
Transgender Female/Male to Female	She/Her/Hers
Transgender Male/Female to Male	He/Him/His

How Will My SOGI Information Be Used?

We believe it is important for UW Health to recognize our patients' personal identities, so we are informed, aware and sensitive to their needs. We also believe it is important for our patients to understand how SOGI information will be used, so they can choose what they want to share with us.

Preferred Name: Your preferred name will be used in communications with you and when referring to you in communications between providers regarding your care, including letters and forms prepared by your clinic. It is also shown in MyChart, although it does not appear for anyone who has proxy access to your MyChart account.

Legal Name: When a preferred name is not indicated, your legal name will be used. The legal name will be used, even when a preferred name is indicated, in specific situations – such as in verifying insurance, legal documentation and communications sent outside the UW Health System (to recipients other than the patient).

Preferred Pronouns: Your preferred pronouns are documented in your medical record and will be used in all verbal communication with you by UW Health staff and providers.

Legal Sex: Your legal sex is used by your medical providers to inform the care they provide to you and how they code certain procedures in your medical record and to bill your insurance. Additionally, your legal sex may be included in letters or other correspondence, typically for legal and insurance purposes.

Sex Assigned at Birth: If your sex assigned at birth is different from your legal sex, it is important that your medical provider is aware of this because it may be

clinically relevant for your care. For example, some preventive care is based on the body parts that you have, and we want to ensure that we remind you about these aspects of your care.

Gender Identity: Your gender identity will be used to help UW Health provide care that affirms your identity. If you choose to provide your gender identity, it will determine the default pronouns that are used in letters and other written correspondence. If you choose “Male,” your pronouns will automatically be set as he/him. If you choose “Female,” your pronouns will automatically be set as she/her. If you choose “Other” or “Choose not to disclose,” no pronouns will be used (only your preferred name). If you tell us your Preferred Pronouns and they differ from the default set by your gender identity, staff can manually change your pronouns in all written correspondence.

Sexual Orientation: Your sexual orientation is available only to clinical staff to view and update.

How Can I Change My SOGI Information?

There are several ways you can update your SOGI information:

- You can self-disclose and make updates in MyChart and at UW Health Welcome Kiosks. Please refer to the MyChart section of this document for more details.
- You can speak with your provider during your appointment. Your provider can review SOGI information with you and document it in your chart.
- You can let a registrar, receptionist, scheduler or check-in staff know. These types of users cannot access your sex assigned at birth or your sexual orientation, but they can update your preferred name and gender identity.
- If you need to change your legal sex, you need to provide documentation to our medical records staff.

Who Can See My SOGI Information?

Your SOGI information is protected by the privacy rules mandated through the Health Information Privacy and Accountability Act (HIPAA), just as everything else is in your health record. If you have questions or want more information about HIPAA, please refer to our HIPAA documentation available upon request or at uwhealth.org.

UW Health employees, UW Health partners such as SwedishAmerican, and contractors who have access to the electronic health record can see different pieces of SOGI information. Employees have access only to the information they need to perform their job functions. For example, the information that a physician can see is much different than the information a scheduler can see. In addition, any health organization that takes part in UW Health Care Everywhere (video visits), insurance companies and billing can view some SOGI information.

We have reviewed the potential reasons a user of the electronic health record might need to view or edit SOGI information and have set up their access accordingly.

Generally speaking, UW Health employees who can see your legal name will also be able to see your preferred name, pronouns, legal sex, sex assigned at birth and gender identity. The intention of allowing this type of access is so that our staff can communicate with you in an inclusive and affirming manner. Your sexual orientation is accessible only to clinical providers because it can be relevant to clinical care.

EXAMPLES OF WHO CAN ACCESS YOUR SOGI						
	Patient, in MyChart	Physicians, Nurses and Other Medical Providers	Registration, Reception and Schedulers	Medical Records Staff	Quartz Insurance Enrollment	Quartz Insurance Claims, Benefits, Behavioral Health, Medical Mgt., Quality Mgt./ Population Health, Pharmacy Services
Legal Name	View Only	View Only	Edit	Edit	Edit	View Only
Preferred Name	Edit	Edit	Edit	Edit	Edit	View Only
Preferred Pronouns	Edit	Edit	View Only	View Only	View Only	View Only
Legal Sex*	Not displayed**	View Only	Edit— Registration/ Scheduling View— Reception	Edit	Edit	View Only
Sex Assigned at Birth	Edit	Edit	No View or Edit	Edit	View Only	View Only
Sexual Orientation	Edit	Edit	No View or Edit	No View or Edit	No View or Edit	No View or Edit
Gender Identity	Edit	Edit	Edit	View Only	Edit	View Only

Please note that the Quartz insurance SOGI access applies only to patients who have Quartz insurance. For patients who do not have Quartz insurance, Quartz will not have access to view your information.

*Legal sex is entered when we first create a patient’s medical record in our electronic health records system, which is typically a task completed by our registration staff. It can be updated if there is a data entry error.

**Legal sex is not displayed as a field in MyChart, but it might be mentioned in the text of letters or content of clinical notes.

SOGI Information in MyChart

You can self-disclose preferred name, gender identity, sex assigned at birth and sexual orientation in MyChart and at UW Health Welcome Kiosks. You can provide as much or as little information as you want.

Be aware that what you enter in MyChart or at UW Health Welcome Kiosks is viewable by UW Health employees and others, as described throughout this document. Please pay special attention to the following Proxy Access section, which explains what information a patient’s MyChart proxy(ies) can see. This proxy information is particularly noteworthy for patients ages 12–17, as access is limited for this age group.

Proxy Access

You can use MyChart to access the medical record of a child, family member or other UW Health patient who has given you access through a MyChart feature called “proxy.” A “proxy” is a person who has been granted access to some parts of a patient’s MyChart account. Multiple people may have proxy access to a single patient’s MyChart. What the proxy can see in MyChart depends on the age of the patient.

INFORMATION THE PROXY CAN VIEW IN MYCHART				
Proxy Category	Clinical Notes	Medications	Test Results	SOGI Information
Under 12	Yes	Yes	Yes	Yes
12 – 17	No	Limited	Limited	No
18 and Older	Yes	Yes	Yes	No*

*If SOGI-related information is documented in letters or notes, the proxy will be able to see it because they do have access to view clinical notes and letters.

Preventive Care Reminders and Health Maintenance Letters

Preventive Care Reminders are a way for your medical provider to remind you about routine health checks and screenings that are due. These reminders are automatically generated by our electronic health system based on characteristics of each patient, such as gender or age. In MyChart, you may see messages or letters related to these reminders categorized as “Health Maintenance.”

If you feel a preventive health screening is not applicable for you, you may request to have your provider mark that the screening does not apply to you and you no longer need it. In some cases, your provider may want to talk with you further, to understand why a health screening is no longer necessary. A few examples of preventive care reminders include: pap smears, mammograms, bone density tests, colon cancer screenings, cholesterol tests and pneumococcal vaccine. For more information about preventive care reminders, please speak with your provider.

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