

Readiness to Safely Collect Sexual Orientation & Gender Identity (SOGI) Data



This tool is designed to assist behavioral health organizations in assessing their readiness to safely collect SOGI data. The tool assesses the areas of policy, training, demonstration of affirmation, and documentation practices. For more SOGI data collection resources, visit sogicenter.org/offerings/data-collection.

POLICY & TRAINING

- Does your agency have a non-discrimination policy for **staff** who identify as LGBTQ+?
- Does your agency have a non-discrimination policy for **clients** who identify as LGBTQ+?
- Does your agency have a policy or provide guidance on how to ensure SOGI information isn't shared without the client's permission?
- Does your agency have a policy that guides staff on how to safely collect SOGI data?
- Does your agency have a policy on who has access to client SOGI data?
- Has your agency provided training on the LGBTQ+ community?
- Has your agency provided training on how to ask about SOGI?
- Has your agency provided training on how to document SOGI information in case notes, reports, etc.?

DEMONSTRATION OF AFFIRMATION

- Do people within your organization display their pronouns to clients? (For example, through introductions, on badges, or on your website's workforce directory.)
- In your agency, are clients able to use the restrooms that feel the safest to them?
- Does your agency offer gender neutral restrooms?
- Does your agency offer client education and resources that are specific to the LGBTQ+ community?
- Does your agency display any affirming symbols in spaces that clients engage in? (For example, rainbow flags, photos of same gender couples, LGBTQ+ magazines, or celebrations of pride.)
- Does your agency display affirming symbols or language on the website?

FORMS & DOCUMENTATION PRACTICES

- Do forms that clients fill out ask about their sexual orientation?
- Do forms that clients fill out ask about their gender identity with more than binary options of man/boy and woman/girl? (For example, nonbinary as a response option.)
- Is a two-question process used to collect gender identity? (For example, first asking current gender identity and then asking sex assigned at birth.)
- Do forms ask if a client's name is different than what is listed on their insurance card or ID?

FORMS & DOCUMENTATION PRACTICES CONT.

- Do forms that clients fill out ask what pronouns they use?
- Are forms gender neutral? (For example, offer options outside “male,” “female,” “mother,” “father,” “Mr.,” or “Mrs.,” for people to select when describing themselves.)
- In all the above questions, is the client asked how they want this information recorded in their medical record and who they do and do not want this information to be shared with?
- Are any diagnoses that might disclose SOGI made known to the client? (For example, if the diagnosis is Gender Dysphoria.)
- Is the client provided an opportunity to discuss how SOGI may be shared with their insurance provider in order for the service to be paid by insurance? (For example, if the condition is related to their SOGI such as in the above example of Gender Dysphoria.)
- Are minors provided information about how their SOGI will or will not be shared with their parents based on local laws regarding parental consent for treatment?
- Does your agency specifically ask clients about who they want to know about their SOGI?
- Do releases of information specifically ask the client if they want their SOGI released to others and how that information may be included in notes written by their behavioral health provider?

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