

Introduction

- ✓ I am a PMP and a Certified Scrum Master. I also have a Bachelors in Computer Science from UC Riverside.
- ✓ I have managed non-strategic and strategic initiatives as part of the PMO at CHOC's Information Services Department, including Revenue Cycle, Clinical Applications, Systems Integration, Information Security, and Infrastructure at CHOC over the last 12 years.
- ✓ Prior to becoming a project manager, my IT healthcare experience included 23 years of working for organizations such as CHOC, Perot Systems, St. Joseph Health System (Providence), and Loma Linda University Medical Center.
- ✓ I was honored to receive the prestigious 2022 President's Recognition Award from CHOC for bringing the latest industry knowledge and practices to the PMO team, as well as helping to make them part of the project management process at CHOC.



Topic Description

- Implementation of the CHOC Sexual Orientation/Gender Identity (SOGI) data fields
- Initiative created opportunities in the electronic health records (EHR) to capture updated and additional SOGI information.



Learning Objectives

- ✓ Promoting organizational awareness
- ✓ Managing diverse feedback
- ✓ Developing and delivering enterprise education
- ✓ Overcoming budget challenges
- ✓ Providing a positive customer experience



Agenda

- ✓ SOGI Project Fundamentals
- ✓ Technology
- ✓ Training / Awareness Mitigation
- ✓ Budget
- ✓ Implementation



SOGI Project Fundamentals



Project Summary

This CHOC project creates opportunities in the electronic health records (EHR) to capture updated and additional sexual orientation and gender identity (SOGI) information. In the past, our EHR did not include this information or used outdated terminology. This SOGI improvement is a small step in our organization's enterprise-wide, belonging, diversity, equity, and inclusion (BDEI) goals **to recognize and affirm that we have diverse patients and to provide inclusive documentation.**



Project Scope

- ✓ Registration Workflow and Policy modifications
- ✓ Organization Awareness
- ✓ For Cerner EHR system:
 - ✓ New Terminology in Registration
 - ✓ Administrative Sex or “Legal Sex” -Required field replaces previous “Sex” field
 - ✓ Sex Assigned at Birth- Not a required field
 - ✓ Gender Identity- Not a required field
 - ✓ Pronouns- Not a required field
 - ✓ Alerts if Administrative Sex and Birth Sex is different in Cerner clinical modules, such as PowerChart, SurgiNet, FirstNet, and PharmNet.
 - ✓ Adding Chosen Name and Pronouns in the Patient Banner Bars
 - ✓ Adding Chosen Name to Facesheet
 - ✓ Adding Chosen Name and Pronouns to Armbands
 - ✓ Social History modifications for Gender Identity and Sexual Orientation

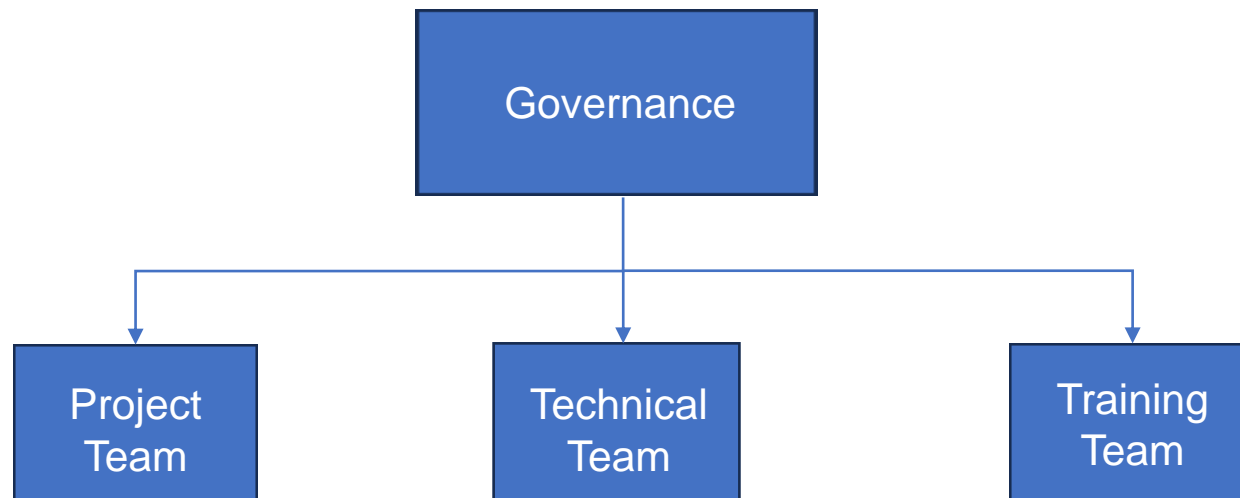
Project Participants

- ✓ Registration
- ✓ HIM (Health Information Management)
- ✓ Billing Office
- ✓ Physician Subject Matter Experts
- ✓ Ambulatory (Primary Care and Specialty Clinics)
- ✓ Inpatient
- ✓ Emergency
- ✓ Social Services
- ✓ Compliance/Legal
- ✓ BDEI (Belonging, Diversity, Equity, and Inclusion)
- ✓ Psychology
- ✓ ISD (Information Services Department)
- ✓ Clinical Informatics
- ✓ Education



Project Structure

- ✓ Regular Meetings:
 - ✓ Project Team (Weekly Status Meetings)
 - ✓ Technical Team
 - ✓ Training Team
 - ✓ Governance (Executive Leadership)



Technology



Technology Deliverables

- ✓ Agreed to use Terminology from Fenway Institute
- ✓ Registration Field Names and Values
- ✓ Armbands
- ✓ Facesheets
- ✓ Whiteboards



Technology Design

Met with the following for design decisions:

- ✓ Ambulatory
- ✓ Lab
- ✓ ED
- ✓ Inpatient
- ✓ Registration/HIM/Revenue Cycle
- ✓ Physicians
- ✓ Compliance



Proof of Concept

Registration

Add/Modify Person

Privacy Notice Given: 02/27/2020 Special Precaution: MRSA Benefactor Program Status: UCI Patient?:

* Administrative Sex: **Male** (dropdown menu open showing Female, Male, Other, Unknown) Sex Assigned at Birth: Gender Identity: Pronouns: * Birth Date: 08/17/2021

* First Name: NGOZI Chosen Name: DAVID Middle Name: Suffix:

Sex Assigned at Birth: **Female** (dropdown menu open showing Female, Male, Other, Unknown)

Gender Identity: **Male** (dropdown menu open showing Another gender, Do not know, Female, Male, Nonbinary, Prefer not to answer, Transgender female, Transgender male)

Pronouns: **They/Them/Theirs** (dropdown menu open showing He/Him/His, Other, She/Her/Hers, They/Them/Theirs)

Proof of Concept

Banner Bar

The banner bar displays patient information for SOGITEST, PCC (DAVID). The name and pronouns "SOGITEST, PCC (DAVID) He/Him/His" are highlighted with a red box. Other details include DOB: 01/01/11, Age: 12 years, Gender: Male (with an information icon circled in red), MRN: 9106317, and FIN: 9101000908. The primary care period is noted as [03/21/23 09:42:16 PDT - 03/21/23 23:59:59 PDT]. The banner also shows a navigation bar with a home icon and the text "SummaryM".

The dialog box, titled "Sex and Gender Identity Information", shows the patient's current status as "Male" with an information icon. A message states: "The documented values are not identical." Below this, there are two sections: "Administrative Sex" with the value "Male" and "Birth Sex" with the value "Female". Both sections are highlighted with a red box. At the bottom of the dialog are "Save" and "Cancel" buttons.

Proof of Concept

Armbands



Proof of Concept

Facesheet

Print Date/Time: 04/24/2023 06:02		CHOC CHILDREN'S ADMISSION/REGISTRATION RECORD			Print By: Test, PSR.OP	
Name: TEST, TESTER Chosen Name: SOGI		MRN: 3859742 FIN: 6158979929 DOB: 01/01/2017 Age: 6 Years		Gender: Female		
PATIENT	Address: Z TEST DR City, ST ZIP: OAKLAND CA 94606		Ethnicity: Hispanic or Race: Other		SSN: Adm Type: Urgent	
	Home: (714) 555-5555 Cell: (714) 555-5555 Preferred Contact Method: Cell Phone		Language: English Adv Dir: No		Adm Source: Clinic or Physician Religion: Christian	
					LINK/CAIR ID:	
					Legal Custody: Parents	

Technology Validation

- ✓ Unit Testing – Technical Architect
- ✓ System Testing – ISD team members
- ✓ User Testing
 - ✓ Registration
 - ✓ Physicians
 - ✓ Inpatient Nursing
 - ✓ Primary Care
 - ✓ Specialty Nursing



Technology Validation

✓ User Testing (cont'd)

- ✓ Radiology
- ✓ Cardiology
- ✓ Educators
- ✓ Pharmacy



Training /Awareness Mitigation



Training/Awareness Challenges

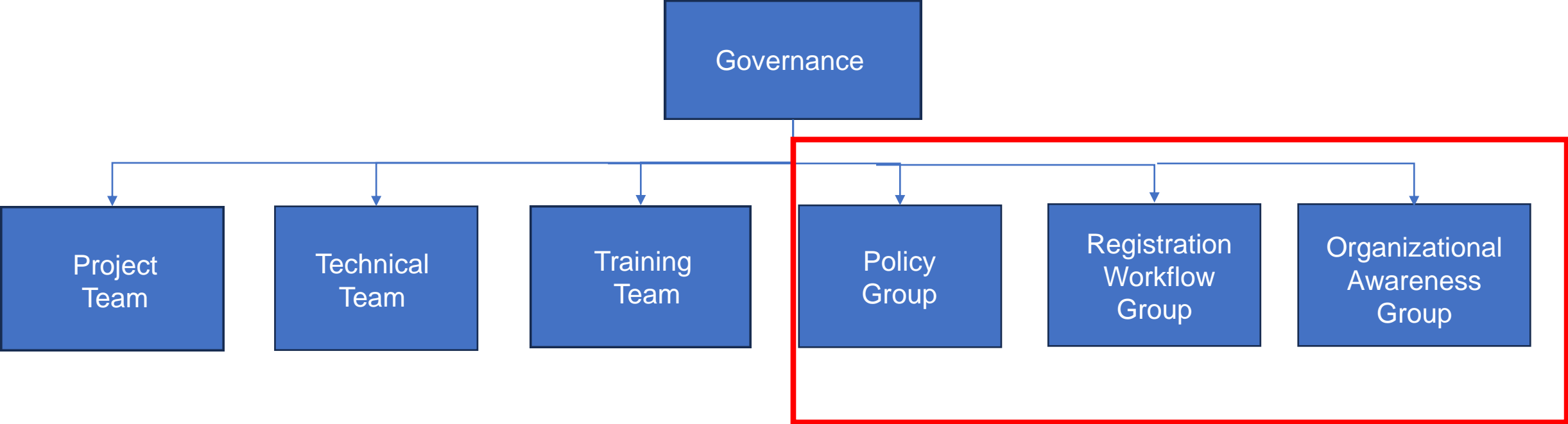
- ✓ Creating SOGI Policies
- ✓ Organization Wide Education (Awareness/Technology)
- ✓ Training Team members became unavailable
- ✓ Other Organizations had challenges



Training/Awareness Challenge Resolution

- ✓ Met with the following:
 - ✓ Executive Director, Clinical Applications
 - ✓ Manager, Clinical Informatics & Training
 - ✓ Director of Learning & Organizational Development
 - ✓ Belonging, Diversity, Equity, & Inclusion Health Equity Manager
- ✓ Came up with the following groups:
 - ✓ Policy Group
 - ✓ Registration Workflow Group
 - ✓ Organizational Awareness Group

Enhanced Project Structure



Policy Group

Participants

- ✓ Director Health Information Management - Lead
- ✓ Executive Director, Clinical Applications
- ✓ Clinical Informaticist
- ✓ Specialty Clinics Manager
- ✓ Central Business Office Director
- ✓ Adolescent Medicine Physicians
- ✓ Patient Access Manager
- ✓ Pharmacy Director
- ✓ Clinical Pharmacy Manager
- ✓ Manager Policy and Licensing

Policy Group

Definitions of the following:

- ✓ Admin Sex – Sex intended to represent a patient’s current sex for administrative purposed including bed placement as well as insurance and benefits determination.
- ✓ Sex assigned at Birth – Based on Anatomy. Maybe used for clinical purposes
- ✓ Gender Identity – Represents a patient’s individual sense of identification with a gender and does not necessarily align with their Birth Sex nor Admin Sex.
- ✓ Gender transition – Process where a person is in process of bringing themselves and/or their bodies into alignment with their gender identity.
- ✓ Pronouns – Tools that are used to refer to or address a person. Pronouns are designed by a person to match and affirm the person’s gender identity.
- ✓ Chosen Name – The name a person goes by and wants others to use in personal communication, even if it is different name on the person’s legal documents.

Registration Workflow

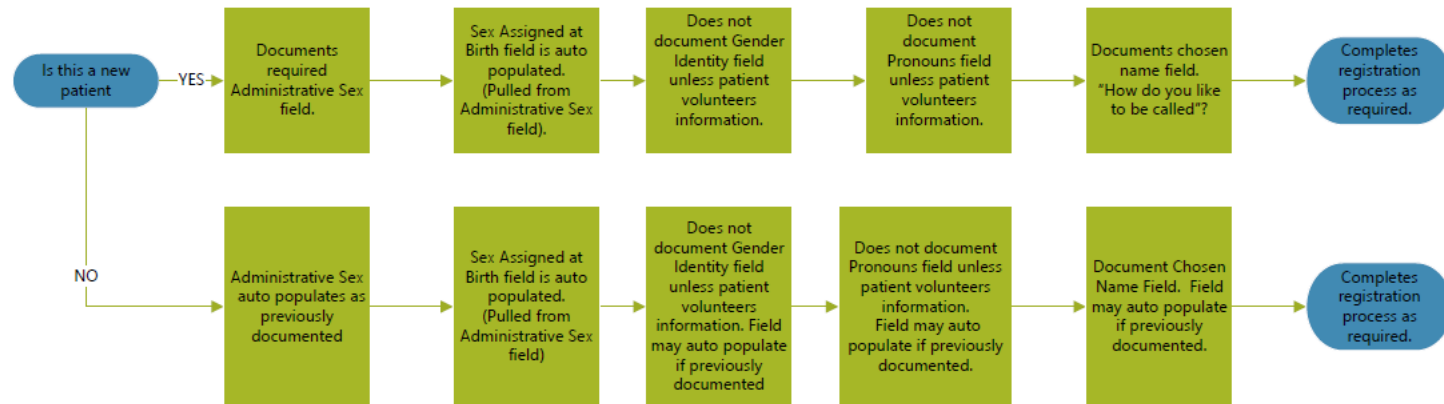
- **Participants**

- ✓ Director Health Information Management
- ✓ Manager, Clinical Education & Excellence
- ✓ Central Business Office Director
- ✓ Clinical Informaticist
- ✓ Primary Care Manager
- ✓ Manager Patient Access
- ✓ ISD Revenue Cycle Manager
- ✓ Manager PCN Projects
- ✓ ISD Systems Analyst
- ✓ BDEI Manager
- ✓ Specialty Clinics Manager
- ✓ Admitting Manager
- ✓ ED Admitting Manager
- ✓ Chief Medical Information Officer

Registration Workflow

Registration Process(All Areas) for SOGI Items_Future State

Registrars/Schedulers



Updating Administrative Sex

- 1.If a patient has had a different sex than birth, the administrative sex is updated based on patient or parent/guardian report.
- 2.If a patient has had a different sex than birth and gives documentation to HIM before seeing registration, HIM will modify the "Admin Sex" field for that patient in Cerner.
- 3.If a patient has had a different sex than birth, and discloses this first to a provider, that provider will reach out to registration. Registration will modify the "Admin Sex" field in the appropriate Cerner conversation.

Registration Scripting

SOGI Registration Scripting

Sexual Orientation Gender Identity

Beginning 6/6/2023 CHOC is taking a step forward in our enterprise wide BDEI (belonging, diversity, equity, and inclusion) goals to affirm and recognize diverse patients and provide inclusive documentation and support to them.

Here are some scripted ways to help you with the new fields in the registration process questions:

Administrative Sex:

What sex is your child? If patient is teenager, what is your sex?

Sex Assigned at Birth: *Not a required field, but if volunteered, please document. Otherwise, field will automatically default to Administrative Sex.*

Definition: What was your child's sex at birth?

Gender Identity: *Not a required field, but if volunteered, please document. Otherwise, leave blank.*

Definition: What gender does your child identify as?

Preferred Pronoun: *Not a required field, but if volunteered, please document. Otherwise, leave blank.*

Definition: What does your child like to be referred to as, He/Him/His, She/Her/Hers or They/Them/Theirs?

Chosen Name:

What does your child like to be called? List name if it is different from legal name. Usually this is referred to as a nickname.

Please be sensitive when asking these questions and give the parents time to respond.

Proceed with the remaining registration fields as usual.

Organizational Awareness Group

- ✓ **Participants**
- ✓ Director of Learning & Organizational Development
- ✓ BDEI Manager
- ✓ Adolescent Medicine Physician

Organization Awareness Group

- ✓ Phase I – Generate Awareness
 - ✓ Leverage monthly BDEI newsletter
 - ✓ Open forum town halls
 - ✓ Leadership training
 - ✓ Technical Training (Cerner)
- ✓ Phase II – Clearly define the culture
 - ✓ Sensitivity Training (front line staff focus)
 - ✓ Implement Communication Plan
- ✓ Phase III – Model the behavior
 - ✓ Leaders/Managers model attributes and behavior
 - ✓ Involve individuals
- ✓ Phase IV – Long term enculturation
 - ✓ New hire content

Enterprise Communication

✓ Executive Meetings

- ✓ Chief Medical Information Officer

✓ Department Head Meeting

- ✓ Adolescent Medicine Physician
- ✓ Belonging, Diversity, Equity, & Inclusion Health Equity Manager
- ✓ Chief Medical Information Officer

✓ Other Meetings

- ✓ Registration Optimization Committee
- ✓ Health Information Management Committee
- ✓ ISD Department meeting

Training Development and Distribution

- ✓ SOGI Introduction
- ✓ Cerner EHR Documentation
 - ✓ Ambulatory Staff
 - ✓ General
 - ✓ Inpatient
 - ✓ Physicians
 - ✓ Registration
- ✓ Who is going to receive the above?

Training Distribution

- ✓ Met with the following:
 - ✓ Clinical Informatics and Training Manager
 - ✓ Another ISD Project Manager
 - ✓ Clinical Informaticist
 - ✓ Learning and Organizational Development Partner
- ✓ Came up with distribution list
- ✓ Distribution: 3 weeks in advance

Training Distribution

- ✓ Physicians and Medical Staff
 - ✓ Director Medical Staff Services
 - ✓ Director HR
 - ✓ VP, CHOC Children's Specialist
 - ✓ PSF Administration
- ✓ Registration
 - ✓ Directors/Managers of Primary Care, Specialty Care, Inpatient Admission, ED

Training Distribution

- ✓ Ambulatory Staff – Primary and Specialty Care Directors, Managers, HIM Director
- ✓ General (Directors/Managers)
 - ✓ Lab, EVS, Respiratory, Pharmacy, Imaging, Child Life
 - ✓ Social Services, HIM, PCS/Command Center, Spiritual Care
 - ✓ Psychology, Rehab
- ✓ Inpatient
 - ✓ Educators / Inpatient Distribution List

Budget



Budget Challenges

- ✓ Consulting hours was shrinking
 - ✓ Project was bigger than anticipated
 - ✓ PM from consulting firm involved
 - ✓ Technical Architect from consulting firm involved
- ✓ Resolution
 - ✓ Elimination of the PM from the consulting firm
 - ✓ Transfer those hours to the Technical Architect



Implementation



Pre Go-Live Challenge

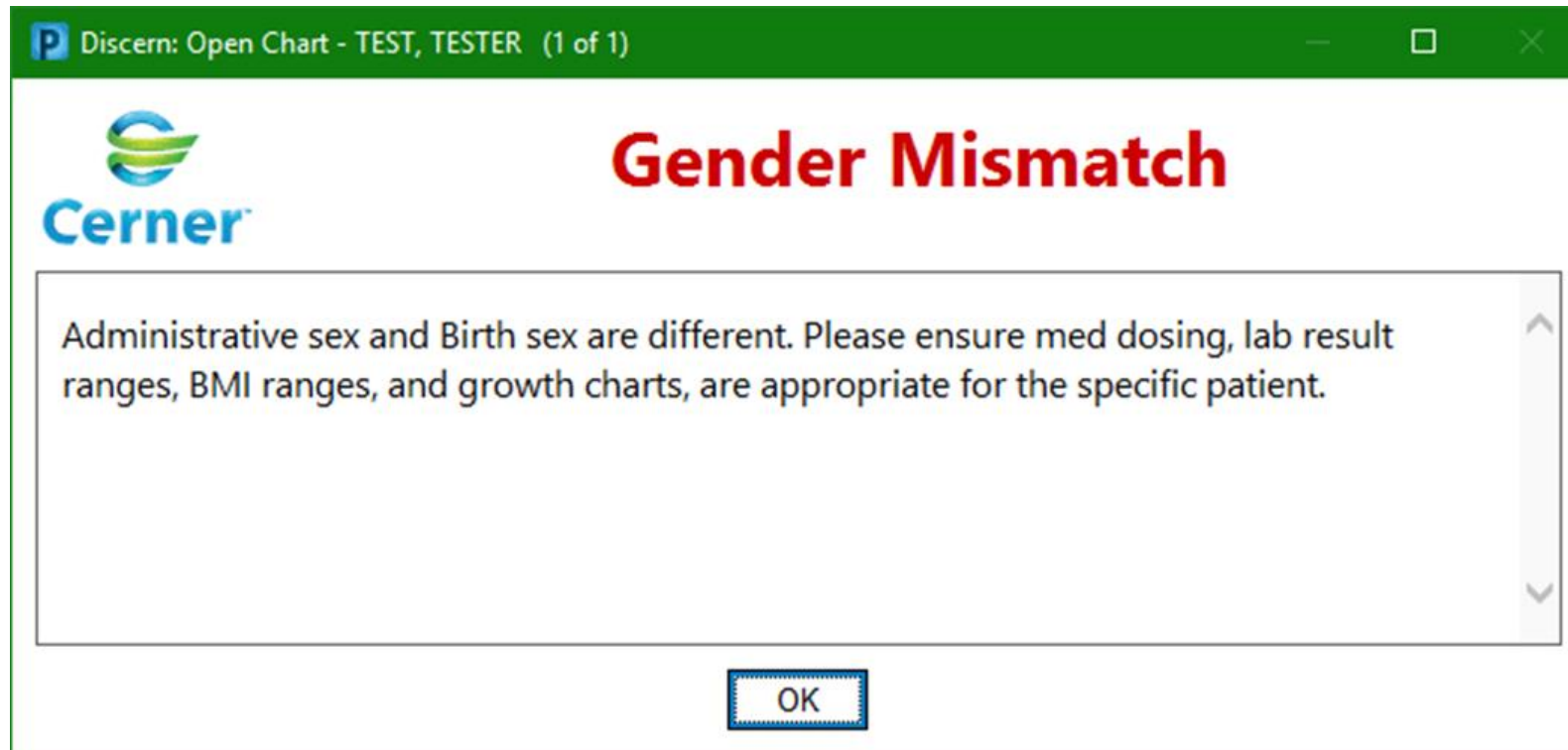
Challenge: Patient's birth sex is female, but identifies as a male (admin sex), but is biologically still a female.

- ✓ Powerchart (Cerner Clinical Module) will utilize the wrong sex (admin sex) to identify problematic laboratory values
- ✓ How would a pharmacist or provider easily determine the biological sex of a patient if there is a discrepancy between birth and admin sex? Certain patients may go through the legal process but not a biological transition.

Resolution: CHOC ISD to find a rule where if the admin sex does not equal Birth Sex, an alert will show up in the Cerner clinical modules, such as PharmNet, PowerChart, FirstNet, and SurgiNet.

Pre Go-Live Challenge

Clinical EHR Modules - Cerner PowerChart, SurgiNet, FirstNet, and PharmNet Alerts



Pre Go-Live Challenge

Challenge: If the parent wants Registration to change the sex of the patient, of course Registration can change this administratively but the sex in our records need to reflect the sex in the health plan or the authorization will be denied. This could possibly result in delaying care to the patient.

Resolution: The goal in the CHOC Patient Access Center is to help facilitate these authorizations and help ease the way for the parent and their child during this already emotional and difficult healthcare complexity. Need to set the appropriate expectation with the parent and let know that this may present challenges with the health plan authorizing the treatment in a timely manner.

Go-Live – 06/06/2023

- ✓ Command Center
- ✓ Daily Status Meetings
- ✓ Dashboard (<10 issues)
 - ✓ Newborn Issue



Post Go-Live

✓ Lessons Learned

✓ Technical

- ✓ Monthly Committee Meetings

- ✓ Pronouns on Facesheets

- ✓ Chosen Name on Discharge Summary

✓ Awareness

- ✓ Town Halls early Fall

- ✓ Long Term Education

- ✓ Registration Script Modification



Post Go-Live - Lessons Learned

✓What Went Well

- ✓Timely meetings - having the right stakeholders at the meetings to make real time decisions
- ✓Able to identify missing stakeholders early on and adapt
- ✓Successful awareness initiative tied to this project, got info out to the organization in multiple different forms so leaders were well informed and staff informed, especially physicians.

Post Go-Live - Lessons Learned

✓ Opportunities

- ✓ Better understanding of the requirements during intake and project requests
- ✓ May have overestimated the culture change. The CMIO was able to bring perspective and allowed team to not overthink
- ✓ Policy assessment and creating starting at beginning of project. Lends to efficiency and more time for finalized policy and sharing/socializing with associates

Post Go-Live Registration Scripting

SOGI Registration Scripting

Sexual Orientation Gender Identity

Beginning 6/6/2023 CHOC is taking a step forward in our enterprise wide BDEI (belonging, diversity, equity, and inclusion) goals to affirm and recognize diverse patients and provide inclusive documentation and support to them.

Here are some scripted ways to help you with the new fields in the registration process questions:

Hello, my name is _____ . I'm going to complete your registration today.

Has your child been here before? (If patient has been here before, verify demographics, if not start a new encounter and create their profile).

*Let's start with the child's **date of birth**.*

*What is your child's **legal first and last name**?*

*Does the patient go by their **legal name** or is there **another name they like to use**? If you'd like, I can document that in our system so we can be sure to call them by that name during their visit.*

*What is the **patient's sex**? Male, Female, Other, or Unknown.*

This next question does not apply to everyone, so you can answer yes or no:

*If the patient is offering a **gender identity**, please ask the following 2 questions:*

1. Options are listed in the drop-down box to document the gender they identify with.
2. *Would you like me to make note of which **pronouns** the team should use?*

If yes: offer the listed options in the drop-down box if patient/parent does not inform staff of chosen pronouns.

Please be sensitive when asking these questions and give the parents time to respond. Proceed with the remaining registration fields as usual.



Questions?

Thank You

Contact: David Bobrow

Linkedin: www.linkedin.com/in/David-Bobrow

LONG LIVE CHILDHOOD

