

# UConn HEALTH

## CLINICAL POLICY

### LEGAL SEX, SEX ASSIGNED AT BIRTH, AND ORGAN INVENTORY IN EPIC

**A. EFFECTIVE DATE :**

July 27, 2020

**B. PURPOSE :**

To ensure patients that patients have the ability to update their legal sex, sex assigned at birth (SAB) and gender identity. This will allow those whose legal sex is X and/or gender identity that is documented and different from their sex assigned at birth or legal sex to benefit from the unreliable sex logic in Epic. The unreliable sex logic ensures relevant clinical information is available to caregivers when patient sex is clinically significant to the order, result, report, test, and documentation.

**C. POLICY :**

1. Patients have the ability to update their legal sex, SAB, and gender identity via the Epic patient portal, MyChart.
2. Clinical staff with appropriate Epic security access have the ability to update legal sex, SAB, gender identity and the organ inventory.

**D. SCOPE :**

All UConn Health Patient Care Areas

**E. DEFINITIONS :**

None

**F. MATERIAL(S) NEEDED :**

None

**G. PROCEDURE :**

Updating preferred name, legal sex, SAB, gender identity, sexual orientation, organ inventory:

1. The call center/telecom operators use approved patient scripting.
  - a. If a patient asks to change their legal sex or gender identity,
    - i. Refer the patient to the Epic patient portal, MyChart.
    - ii. If the patient does not have access, offer to enroll the patient in the Epic patient portal, MyChart.
    - iii. If the patient does not wish to enroll, send an In Basket message to the patient's caregiver for discussion and alert them to locate a 'post card' in their appointment location to discuss with their provider at the time of their visit.
2. The pre-registration staff use approved patient scripting.
  - a. If a patient asks to change their legal sex or gender identity,
    - i. Refer the patient to the Epic patient portal, MyChart.

- ii. If the patient does not have access, offer to enroll the patient in the Epic patient portal.
  - iii. If the patient does not wish to enroll, update the patient's preferred name, legal sex, SAB, and GI. The patient's sexual orientation will be completed by provider during patient visit.
3. Patients may obtain a 'post card' in their patient care location if they wish to discuss their gender identity with their provider.
4. Providers/nurses discuss gender identity, SAB, gender identity, and perform organ inventory as appropriate.
5. Providers/nurses document the patient's gender identity, SAB, sexual orientation, and organ inventory in the SOGI smartform as appropriate.
6. Providers/nurses document the change to patient's legal sex in Epic demographics by double-clicking on the patient's picture in Storyboard or from demographics.
7. Providers/ monitor patient orders, results, and documentation utilizing the patient's SAB as clinically appropriate.
  - a. Male and Female reference ranges will display
  - b. Male and Female tools (PE forms, order/testing pre-requisites) are available.
  - c. Monitor Health maintenance as patients with unreliable sex will be added to both male and female maintenance items.
8. Refer to the Organ Inventory in the Sidebar report as necessary.

**H. ATTACHMENTS :**

None

**I. REFERENCES :**

[Epic Reliable Sex Logic](#)

[CT DMV Gender Designation on a license or identification card](#)

**J. SEARCH WORDS :**

SOGI, transgender, unreliable sex, sex assigned at birth, gender identity

**K. ENFORCEMENT:**

Violations of this policy or associated procedures may result in appropriate disciplinary measures in accordance with University By-Laws, General Rules of Conduct for All University Employees, applicable collective bargaining agreements, the University of Connecticut Student Code, other applicable University Policies, or as outlined in any procedures document related to this policy.

**L. STAKEHOLDER APPROVALS :**

On File

**M. COMMITTEE APPROVALS :**

None

**N. FINAL APPROVAL :**

- |   |                                   |
|---|-----------------------------------|
| <p>1. <u>Andrew Agwunobi, MD (Signed)</u><br/>Andrew Agwunobi, MD, MBA<br/><b>UConn Health Chief Executive Officer</b></p>                  | <p><u>08/28/2020</u><br/>Date</p> |
| <p>2. <u>Anne D. Horbatuck, RN, BSN, MBA (Signed)</u><br/>Anne D. Horbatuck, RN, BSN, MBA<br/><b>Clinical Policy Committee Co-Chair</b></p> | <p><u>08/27/2020</u><br/>Date</p> |
| <p>3. <u>Scott Allen, MD (Signed)</u><br/>Scott Allen, MD<br/><b>Clinical Policy Committee Co-Chair</b></p>                                 | <p><u>08/27/2020</u><br/>Date</p> |
| <p>4. <u>Caryl Ryan, MS, RN (Signed)</u><br/>Caryl Ryan, MS, RN<br/><b>VP Quality and Patient Service &amp; Chief Nursing Officer</b></p>   | <p><u>08/27/2020</u><br/>Date</p> |

**O. REVISION HISTORY :**

Issued: July 27, 2020