



A PROGRAM OF THE FENWAY INSTITUTE

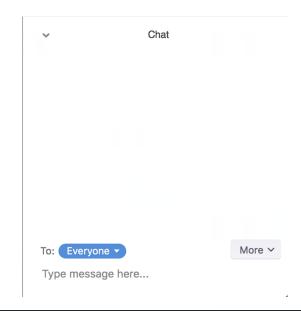
Hello everyone! Please put your name and organization in the chat box so we can take attendance :)

Every Person Counts: Leveraging SDOH and SOGI Data for LGBTQIA+ Asian American, Native Hawaiian, and Pacific Islander-Serving Health Centers

Session 5: Tips, Tools, & Tricks for Implementation of SDOH and SOGI Data Collection

June 24, 2021 9-10:30am HT | 12-1:30pm PT | 3-4:40pm ET

Zoom Housekeeping





Moderators



Albert Ayson, Jr. (he/him)
Associate Director
Training and Technical Assistance
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Sakura Miyazaki (she/her)
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Jack Bruno (he/him)
Operations Coordinator
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Program Manager

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Poll

Which of the following best describes your organization type?

- Community Health Center (FQHC, Look-Alike)
- Primary Care Association (PCA)
- National Training & Technical Assistance Partner (NTTAP)
- Health Center Controlled Network (HCCN)
- Government
- Academic Institution
- Social Service or Community-Based Organization (CBO)
- Other

Acronyms

- 1. AA, NH, and PI: Asian American, Native Hawaiian, and Pacific Islander
- 2. ES: Enabling Services
- 3. FQHC: Federally Qualified Health Center
- 4. **HCCN:** Health Center Controlled Network
- **5. LGBTQIA+:** Lesbian, gay, bisexual, transgender, queer, intersex, asexual, and all sexual and gender minority
- 6. NTTAP: National Training and Technical Assistance Partner
- 7. PCA: Primary Care Association
- 8. SDOH: Social Determinants of Health
- 9. SOGI: Sexual Orientation and Gender Identity

Overview

- Five 90-minute sessions every Thursday today is the final one!
 - Session 1: Introduction to the Intersecting Identities of LGBTQIA+ AAs, NHs, and PIs
 - Session 2: Introduction to SDOH and SOGI Data Collection for Health Centers
 - Session 3: Building, Implementing, and Evaluating Inclusive Systems for SDOH and SOGI Data Collection
 - Session 4: Addressing Patient Needs through Population Health Level Interventions Informed by SDOH and SOGI Data Collection
 - Session 5 : Tips, Tools, & Tricks for Implementation of SDOH and SOGI Data Collection
- Feel free ask questions and chime in during the session, but please note that the didactic sections will be posted for the cohort to access as a resource.

Agenda

- Welcome and Introductions (10 minutes)
- Apicha Presentation (40 minutes)
- Q&A (15 minutes)
- Recap Activity (20 minutes)
- Closing (5 minutes)

Recap of Session 4 with AAPCHO

- CHCs/health organizations already ask many/most SDOH questions
- Workflow the 5 rights
 - Information, time, person, format, place
- Cultural competency -> cultural humility
 - Self reflection, change, accountability
 - Openness, appreciation, flexibility, acceptance

To apply tools and resources to support your

Today's Learning Objectives

 To apply tools and resources to support your health center staff, management, leadership with standardized SDOH and SOGI data collection.

Apicha Community Health Center Panelists



Timothy Au, MSW, LMSW (he/him) Asst. Director of Support Services-Member Services



Marites Estoque, MS, RHIA, CCS, CRC (she/her) Population Health Manager



Erilande Silma, MA, MS, LBBP, CSM (she/her)



(she/her) Director of Population Health Management

Director of Support Services

Venus Vacharakitja, PhD



Tips, Tools, & Tricks for Implementation of SDOH and SOGI Data Collection

Apicha Community Health Center

Agenda

- Introduction
- Overview of SOGI and SDOH
- Optimizing SOGI Data Collection
- Revamping SDOH Data Collection



Our Mission Statement

- To improve the health of our community and to increase access to comprehensive primary care, preventive health services, mental health and supportive services. We are committed to excellence and to providing culturally competent services that enhance the quality of life.
- Apicha CHC advocates for and provides a welcoming environment for underserved and vulnerable people, especially <u>Asians & Pacific Islanders</u>, the <u>LGBT community</u> and individuals living with and affected by <u>HIV/AIDS</u>.

Full FQHC Designation (2015) DOHMH EBP Awarded (2016) FQHC Look-Alike Designation Health Home Subcontract (2012) Transgender Health Clinic (2011) Patient-Centered Medical Home Level 3 (2010) General Primary Care (2009) HIV Primary Care (2003) HIV Testing (2000) Case Management (1997) Street Outreach & Advocacy (1989)

About Us

- Apicha Community Health Center was founded in 1989 to address unmet HIV/AIDS-related needs of Asians and Pacific Islanders in New York City.
- Formerly named <u>Asian and Pacific Islander Coalition on HIV/AIDS.</u>
- Apicha CHC has been servicing LGBTQ+ patients since its inception.
- In 2009 after two decades of HIV-focused practice, we expanded our nationally-recognized HIV care model to include general primary care.
- In 2011, we launched our Transgender Health Clinic to address the unique healthcare and wellness needs of transgender, gender variant, gender non-conforming, and genderqueer people of color.



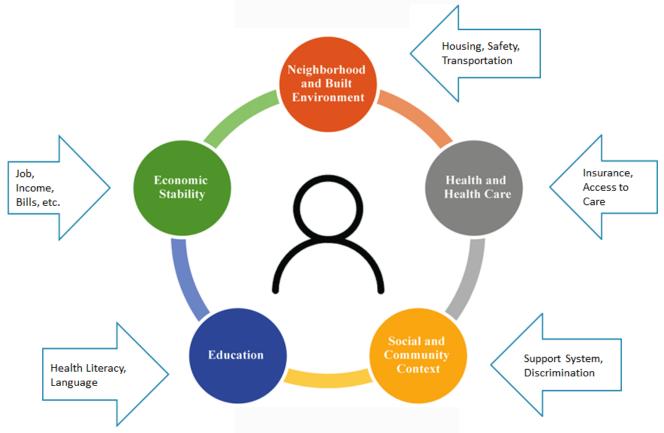
Sexual Orientation (SO)
Gender Identity (GI)
Social Determinant of Health (SDOH)

SOGI

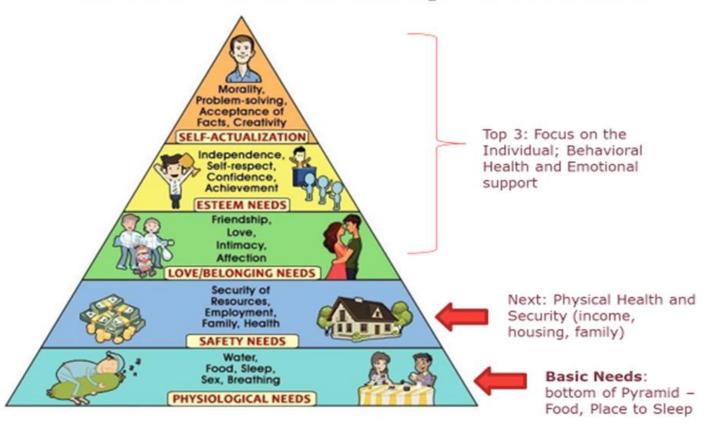
- SO = Sexual Orientation
- GI = Gender Identity
- SO ≠ GI



Social Determinants of Health



SDOH & Hierarchy of Needs





Name:	(first) A.KA:						
DOB:	Soc. Sec. No.:						
Client ID:	Intake Date:						
	Today's Date:						
Address:	Zip Code:						
	hone:Email:						
Is discretion required	when contact (mail, home visit, voicemail)? [] Yes [] No						
Gender: M/F/T (M→F)/T (F→M)/Other: Sexual Orientation: G/L/B/H/Q Race:							
Year of Entry to the U.S.: Immigration Status: VISA: Country of Citizenship:							
Insurance: [] Medicaid: [##							
Religious Affiliation: _							
Emergency Contact:	Name						
	Address						
	Phone Number						
	Relationship Consent Given Y/N						

History of Data Collection

- Paper form(s)
- Transcribe data collected into require database
- Agency/Center Registration form
- Departmental Registration form

REGISTRATION FORM

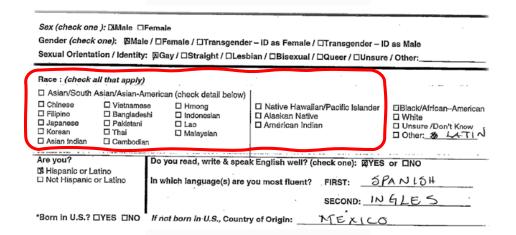


Legal Last Name	Legal First Name				Preferred First Name				Preferred Pronoun		
Address			Apartment #		City		State	Zip Code			
Cell phone number Home Phone number					Primary c	Primary contact? Email a		address			
					☐ Cell☐ Home	:					
Date of birth	Social security number	1	How did y	you hear	hear about us?						
	☐ Friend☐ Patient☐ Doctor			t r	☐ Brochure ☐ Internet ☐ Case worker ☐ APICHA website ☐ Social media ☐ Outreach						
We recognize that the information collected on this form may not reflect all of our community. We are required to collect information for billing and respect your preferred pronoun.											
Sex assigned at birth	Sexual orientation	H <i>o</i> use size			Emergency Contact Inform		t Informa	tion			
	Lesbian	Annu	al			Name					
Gender identity	☐ Bisexual	House	eh <i>o</i> ld			Relationsh	ip				
☐ Male	Queer / Something else	incon	ne			Phone Nur	nber				
	□ Straight □ Don't know	Ethni	city	Race	e (Check all that apply)						
	☐ Declined to answer	☐ Hi ☐ No Hispa		☐ American Indian / Alaska Native ☐ Asian ² ☐ Black/African American				Native Hawaiian ³ White/Caucasian Declined to answer			

Hispanic Detail ¹			Native Hawaiian/Pacific Islander Detail 3			US Military	Insurance Information		
☐Puerto Rican	☐ Central An	nerican	☐Native Hawaiian			Veteran?			
□Dominican	□ Cuban		☐Guamanian or C	ham	orro	☐ Yes	☐ Medicai	d 🗌 Private	
☐South American			□Samoan			□ No	☐ Medicai	dHMO □ ADAP	
☐Mexican / Mexicar	n-American / C	hicano(a)	☐Other Pacific Isla	ande	er e		☐ Medicar	re 🗌 No insurance	
Asian Detail ²				P	Migrant Worker?		If you do no	t have health insurance we will	
□Bangladeshi □Japanese			1	Yes		determine your sliding scale discount based on			
□Chinese	∐Kor	ean		[No		your income.		
☐ Cambodian	□Ma	laysian		F	lousing information		Insurance Information		
Filipino	□Pak			☐ Public housing			Plan		
□Indian	□Tha			i	HASA, Section 8, NYC	HΔ\	Name	[]	
□Indonesian □Other				☐ Street		Policy #			
					☐ Homeless shelter		Toney #		
			_ i	☐ Transitional housing	าฮ	Group #			
Country of birth Preferred language			anguage	į	Doubling up	·°	Sex listed in health insurance		
			☐ SRO / motel)	☐ Male		
							☐ Female		
Year when you came to US? Interprete		r needed?	E	ducation Achieved		P	olicy Holder Information		
		☐ Yes		[No schooling		Name		
		☐ No		[☐ 8 th grade or less				
Registered to vote?		Need help	to register?] [☐ Some high school		Date of		
_				- 1	☐ High school (GED)		birth		
☐ Yes		☐ Yes			☐ Some college		SSN		
□ No		☐ No		- 1 -	☐ Bachelor/technica	l degree		Employer Information	
				[☐ Postgraduate		Name		

Impact of Race on SOGI and SDOH

- Registration:
 - Patients received registration package to complete by themselves
 - Some Hispanic patients leave race section blank



Current Practices in Capturing SOGI

- o Registration:
 - Patients received registration package to complete by themselves
 - Some patients leave SOGI section blank
 - Option to decline answering SOGI questions
 - Old registration form allow patient to select decline to answer
 - New form is updated to remove decline option
 - Using BOTH Sex Assigned at Birth and current gender identity to identify your transgender patients

Fenway Health's Emerging Practice: Some clients of transgender experience may prefer to indicate man or woman on their forms, rather than trans man or trans woman.

Additional anatomical inventory and rapport building will allow for the provision of affirming and appropriate care.

Sex assigned at Dirth		□ Doctor □ S
	e information collected on this for We recognize and respect your	
Gender Identity	Sexual Orientation	Household Size
☐ Male ☐ Female ☐ Trans*Male	Lesbian Bisexual	1
☐ Trans*Female	Queer / Something else	Annual Household income
☐ GQ/GNC	Straight ☐ Don't know ☐ Declined to answer	\$0,000

Challenges in Capturing SOGI

Health Literacy:

- Sexual Orientation ≠ Gender Identity
- Some patients are not aware of the difference
- Immigrants and cultural differences may play a role





Challenges in Capturing SOGI

• Pronouns:

- From experience servicing patients, there are communication problems when misgendering/using incorrect pronouns
- Apologize and acknowledge mistakes were made
- Inform the patient you will use the correct pronouns moving forward

SDOH PRAPARE Implementation

- Adapt to use PRAPARE assessment tool to capture SDOH
 - Pilot project began in August 2020
 - Focus on assessing high to moderate risk patients
- Medical Case Manager to conduct PRAPARE assessment
 - Document in EHR
 - Select appropriate SDOH Z Codes in EHR
- Set project goals
 - 40 PRAPARE assessment per Case Manager per month
- Training to Medical Case Manager
 - Develop SDOH Z code cheat sheet
 - Create Step-by-step EHR documentation guide

Current SDOH PRAPARE Practices

Screening:

- During meeting with Medical Case Manager (MCM); PRAPARE assessment is uses once at intake by MCM to assess patients who are –
 - Low income (based on Medicaid income guideline), and/or
 - Homeless (self-identified or by medical provider), and/or
 - Uninsured (self-identified or by medical provider)
 - Not yet implemented across all patients
 - MCM refer patient with SDOH barriers to specialty services

Lessons Learned

Challenges and Strategies

- MCMs are to collaborate with external programs and services staff (i.e., Comprehensive Care Management, Care Coordination, PrEP Navigation, external case managers, etc.), and gather their assessment and care plans, and then transfer information into EMR
- MCM have access to clinical informatics (Azara) utilize pre-visit planning to identify patient who needs PRAPARE assessment
- Medical Case Manager experience challenges with documentation in EMR
 - Various way of documentation
 - Selecting the correct diagnosis code (Z Codes) from EMR



Tips for Optimizing SOGI Data Collection

- Identify all systems with SOGI information
- Rank your data systems capturing SOGI
- Evaluate the current state of SOGI collection
- Review the format of the available data
- Identify your SOGI data gaps
- Assess your capacity and resources to update SOGI
- Determine the level of training needed for staff



Assign a **Team Leader** who will drive success



Establish SOGI Data collection Goals



Identify **subject matter experts** (SME)



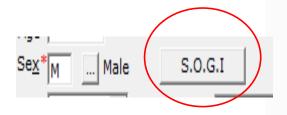
Evaluate your capacity and request assistance if needed



Include Frontline staff in your workgroups

Assemble A Workgroup

SOGI in Electronic Health Records





Birth	Birth Sex ● Male ○ Female ○ Unknown					
Sexua	Sexual Orientation					
	Name					
•	Lesbian, gay or homosexual					
0	Straight or heterosexual					
0	Bisexual					
0	Do not know					
0	Choose not to disclose					
0	Something else, please describe					
Gender Identity						
	Name					
✓	Male					
	Female					
	Female-to-Male (FTM) / Transgender Male/Trans Man					
	Male-to-Female (MTF) / Transgender Female/Trans Woman					
	Genderqueer, neither exclusively male nor female					
	Choose not to disclose					
П	Additional gender category or other, please specify					
□ Tr	ransgender					

Electronic Health Records

- Minimize data entry errors or unknowns in the EHR by ensuring your registration form reflect the content in the system.
- Develop a quality assurance process to review paper-based registration forms to ensure accuracy with data input in EHR.
- Design a workflow that allows for SOGI to be captured in other areas
 of the organization that can eventually be redirected back to the EHR.
- Utilize the functionality of other systems connected to the EHR to trigger SOGI alerts to staff or patients.

Planning for Improvement

SO/GI Project Goal:
Increase the capturing of
SO/GI data

SO/GI Project Goal:

To increase the data entry of SO/GI in EHR by 10% at the end of the 3rd quarter of 2021

- Goal setting is necessary for monitoring success
- Make goals specific, achievable, and timely
- Determine resources needed to achieve success



Data Quality

- Review mapping of built-in reports aligned with SOGI information
- Examine trends in the data such as unexpected spikes or dips
- Check for invalid and/or duplicate identifiers, or missing data
- Check for values outside a specified range (e.g., Time period)
- Check that certain formats are correct and consistent (e.g., dates, unique identifiers, abbreviations)





Monitoring Strategies

- Establish your communication pathway for collecting, updating, and monitoring the data
- Develop dashboards, tools, and scheduled reports
- Schedule future meetings with the workgroup to discuss barriers to maintaining outcomes after implementation
- Include SOGI updates as part of Pre-Visit Planning process



Training and Education

- Case Managers should be trained on the collection of SOGI data.
- Ensure Medical Providers/Pharmacists are aware of the SOGI organization goals.
- Enhance the utilization of the patient portal to educate and engage patients with missing SOGI.
- Include Finance and Billing teams input on the impact of SOGI information on operations.
- Work closely with IT/Data Analytics team to increase their understanding of the guidelines or regulations around SOGI collection.
- Provide support or training to community-based organizations, referral partners and private practice professionals who are interested in learning more about SOGI.

Revamping SDOH Data Collection

SDOH Pilot Project

Purpose

Improve collection of SDOH Data to address unmet social needs, in support of improving patient health outcomes.

Project Deliverables

- Research and gather resources to inform SDOH Pilot Project.
- Collect SDOH Data via the PRAPARE smartform in eCW streamlining the process.
- Implement SDOH ICD-10 Coding as a standard approach in capturing SDOH data.
- Train Medical Case Managers on PRAPARE workflow and SDOH Coding.
- Monitoring of SDOH Data based on data aggregated from systems.

SDOH Coding Guideline

'For social determinants of health, such as information found in categories Z55-Z65, Persons with potential health hazards related to socioeconomic and psychosocial circumstances, code assignment may be based on medical record documentation from clinicians involved in the care of the patient who are not the patient's provider since this information represents social information, rather than medical diagnoses.'

'Patient self-reported documentation may also be used to assign codes for social determinants of health, as long as the patient self-reported information is signed-off by and incorporated into the health record by either a clinician or provider.'

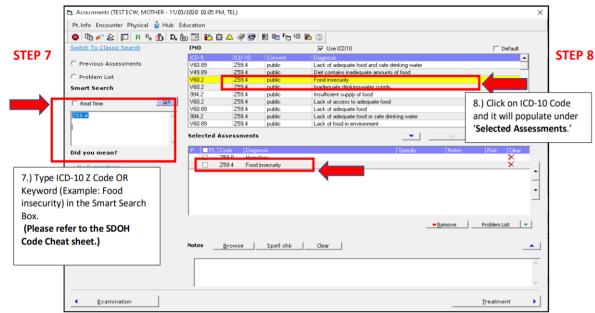
(ICD-10-CM updates, Jan. 2021 Guidelines for Coding and Reporting)

SDOH Z-CODE CHEAT SHEET

PRAPARE Question	PRAPARE Answer	Social Determinants of Health ICD-10 Z Code
Income Level (Federal Poverty Level percentage)	100% or below 101-150% 151-200%	Z59.5 Extreme poverty Z59.6 Low-income
Veteran Status	Yes	Z91.82 Personal history of military deployment
MONEY & RESOURCES		
What is your current housing situation today?	I have housing I do not have housing (staying with others, in a hotel, in a shelter, living outside on the	No Code Available Z59.0 Homelessness Z59.1 Inadequate housing (Unstable Housing)
	street, on a beach, in a car, or in a park)	Z59.8 Other problems related to housing and economic circumstances

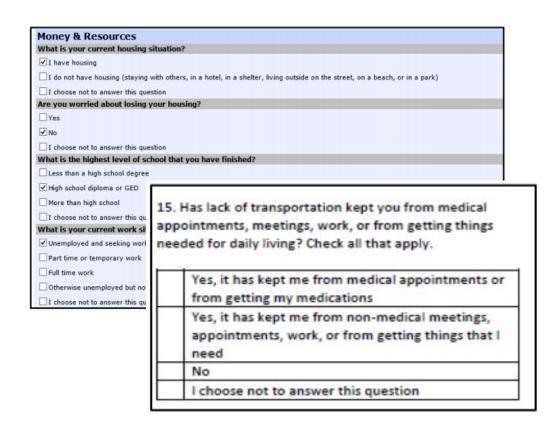
SDOH/PRAPARE Training

- Multiple training sessions conducted for completing PRAPARE and SDOH Coding.
- Training packet developed as a guide for Medical Case Managers which included:
 - Step-by-step process of completing the PRAPARE assessment and follow up documentation in eCW



SDOH/PRAPARE Training

- PRAPARE Smartform & Paper Form
- SDOH Coding step-by-step process
- SDOH Z-Code Coding Sheet
- Supplemental Training Video
- NACHC PRAPARE Score Tally Analysis

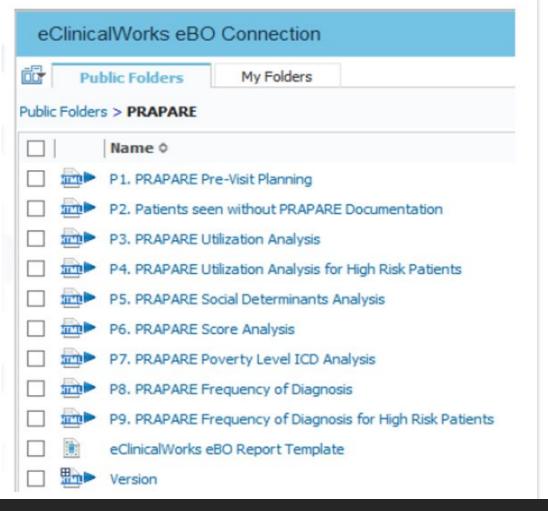


	Phase I	Phase II
Goal	 Streamline the process capturing SDOH data transitioning to implement standard use of PRAPARE smartform. 	 Add the SDOH Coding component to capture ICD-10 Z codes as a standard way of collecting SDOH data.
Actions	 Medical Case Manager (MCM) administered the PRAPARE assessments. MCM trained on how to complete the PRAPARE smartform. Population Health Team developed an eCW SDOH/PRAPARE Reference Guide. 	 Additional MCMs participated in Pilot. MCMs were trained how to complete the PRAPARE smartform Train MCMS on SDOH Coding. Document the mode of communication of completed PRAPARE.
Summary of Findings	 Patients contacted via phone by the MCM to complete the PRAPARE assessment. 40-45 minutes to administer PRAPARE including documentation. Few patients were from other Programs with Support Services as the Health Home Program. 	 MCMs completed the assessments using the paper form as a workaround solution to due to eCW barrier. Outreach consisted of phone calls, emails, and voicemail messages. Few patients declined to complete the PRAPARE assessments.

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APICHA COMMUNITY HEALTH CENTER

Monitoring SDOH Data



SDOH Pilot Planning Tips



Research Best Practices to establish a benchmark



Identify internal and external resources available



Don't be afraid to reach out for Technical Assistance



Attend SDOH-related webinars or educational sessions



Determine key staff to support workflow improvement



Assess your patient population to determine the best implementation

2021 SDOH Initiatives

- Implementing SDOH module to monitor SDOH data.
- Prepare for new ICD-10 SDOH Z codes for October 1st, 2021.
- Update training materials and retrain staff on updated codes.
- Touch base with internal teams to discuss if there were any challenges.
- Communicate updates related to PRAPARE smartform.

References

- AAPCHO https://aapcho.org/focusareas/prapare/
- AHA SDOH Coding Webinar https://www.codingclinicadvisor.com/webinar/icd-10-cm-codes-social-determinants-health
- American Hospital Association https://www.aha.org/system/files/2018-04/value-initiative-icd-10-code-social-determinants-of-health.pdf
- Azara https://azarahealthcare.com/
- Community Health Care Association of New York (CHCANYS) http://w.chcanys.org/sites/default/files/2020-12/NYS%20SDOH%20Workgroup%20Coding%20Guidance%202020.pdf
- National Association of Community Health Center NACHC SDOH Training Toolkit https://www.nachc.org/research-and-data/prapare/toolkit/
- National LGBTQIA Health Education Center: A Program of The Fenway Institute https://www.lgbtqiahealtheducation.org/resources/in/collecting-sexual-orientation-and-gender-identity-data/
- PRAPARE Tiger Team Training https://aapcho.org/event/prapare-tiger-team-trainings-5/
- The Social Determinant of Health Academy https://sdohacademy.com/

Thank you

QUESTIONS?



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Q&A

Recap of Learning Collaborative

Padlet Activity:

https://padlet.com/smiyazaki1/kms4juzxsni7ejo9

Exit Poll

- 1. Overall, how satisfied are you with this session?
- 2. How confident are you that you will be able to apply information from this session at your health center/organization?
- 3. Based on your level of knowledge prior to the session, how would you rate changes to your knowledge as a result of the session?

Exit Poll (Open-Ended)

Optional, but feel free to share your thoughts with us through the chat box.

- Any outstanding questions?
- What other information/topics would you like to see presented?
- Are there additional resources you would like to have?

Thank you!





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