Patient Demographics: How Data Informs Intradisciplinary Systems & Public Health Innovations

Jennifer Etue, LICSW

Natasha Viveiros RN, MPH

Yan Qi

In Partnership With: Chelsea DePaula MPH & Laurie Whittemore

PCHC
PROVIDENCE COMMUNITY HEALTH CENTERS

Meet the Team

Jen Etue, LICSW

Manager of Integrated Behavioral Health

Natasha Viveiros, RN, MPH

Director of Site Operations & Special Projects

Yan Qi

Population Health Analyst, Accountable Entity

Multilevel Collaboration

Integrated Behavioral Health

- Content expert
- Trauma informed care

Operations

- Project management
- Develop mechanisms for operational oversite and ownership

Data Analytics

- Develop reporting mechanism to monitor adoption and compliance with data collection upon completion of training

Objectives

- Increase participant knowledge of interdisciplinary team related to use of data, implementation of staff training support and systems change.
- Increase participant capacity of use of organizational level data and agency change.
- Increase organizational accountability, staff support and training.

Background

PCHC Background

2021 UDS Report % of patients that refused to report, or field is unknown:

- Race: 27.7%
- Ethnicity: 4.2%
- Sexual Orientation: 50.2%
- Gender Identity: 46.5%
- Income: 80.8%

Needs Assessment

Front Desk Staff Experience with Collecting REL, Income and SOGI data

1. Have you been trained to collect REL, SOGI and Income data?
2. What challenges do you currently face when asking patients about their REL, SOGI and Income?
3. What types of responses do you get from patients when asking for this information? Please provide specific scenarios.
4. What additional resources or training would be helpful to have so that you feel comfortable and confident asking patients for this type of information?

Front Desk Staff Experience with Collecting REL, Income and SOGI data

Feedback

- About 50% of staff said they would like additional training on how to engage patients to best collect REL & SOGI data

Challenges:

- Blank responses from patient on paper registration form
- Lack of privacy
- Patients get offended, defensive, uncomfortable, and embarrassed
- Patients do not know what to choose for race and ethnicity

Responses:

- Patients want to know why we need this information
- “That is too personal”
- “Do I have to tell you?”

Resources:

- Prefer dry erase board to complete information confidentially
- Would like to know how to explain the difference between race and ethnicity
- Learn more about why we need to collect this information
- Communication skills

Development of Intervention

Development of Intervention

Qualtrics Survey

- Created and implemented 8 question Qualtrics text survey for patients with unknown REL and SOGI data
    - *Survey topics: ethnicity, race, language, gender identity, sexual orientation, sex assigned at birth, pronouns, preferred name*
    - Reviewed by 27 PCHC staff members prior to being sent to patients
    - Available in English, Spanish, and Portuguese
- Text was sent out to 10,596 patients who had previously consented to texting
    - 1,683 responses received (16%)
- Front desk staff then updated patient's information received within Qualtrics text survey into the EHR manually

Development of Intervention

Training Curriculum
(not just data or data collection, but data driven)

- Training created through collaboration of:
  - Trauma informed trainer using gaps in both HRSA data and qualitative staff reported feedback related to knowledge gaps re: REL and SOGI.

- Training targeted to support:
  - Adult learners to shift thinking around patient centered care &
  - Gender affirming/ equitable care starting the moment a patient enters our clinic(s).

Development of Intervention

Training Curriculum
(not just data or data collection, but data driven)

- Increasing understanding of bias in health care systems:
  - How customer service interactions can make/ break a patient's experience before they engage with care teams.
- Increasing understanding of how these positive or negative interactions create a system of fear and avoidance for patients impacting health disparities.
- Overarching Public Health focus

Development of Intervention

Laminated Front Desk Tool

Available in the following languages:

- English
- Spanish
- Portuguese
- Khmer

Demographic Update: We collect race, ethnicity, language, sexual orientation, and gender identity information from all of our patients. By knowing more about your background, we can get a better idea of health concerns you may have and be generally sensitive to your needs.

1. Please select the ethnicity that describes you best:

- ◻ Latino/Hispanic/Latinx
- ◻ Not Hispanic/Latino
- ◻ Other
- ◻ Prefer not to say at this time

**Your ethnicity is different than your race (for example, you can be black or white, but also Hispanic or not)*

2. Race generally comes from where the generations of your family have lived. **Please select the race that describes you best.**

- ◻ Caucasian/White
- ◻ Black/African American
- ◻ Asian
- ◻ Other Pacific Islander
- ◻ American Indian or Alaskan Native
- ◻ I don't know my race
- ◻ I don't want my race known to PCHC at this time

3. Which language is best for you?

- ◻ English
- ◻ Spanish
- ◻ Portuguese
- ◻ Khmer
- ◻ French Creole
- ◻ Portuguese Creole
- ◻ Other _____

4. Please choose the Gender Identity that best describes how you feel inside:

- ◻ Male
- ◻ Female
- ◻ Transgender Male/ Female-to-male
- ◻ Transgender Female/ Male-to-Female
- ◻ Nonbinary Genderqueer (Neither exclusively male nor female)
- ◻ Other _____
- ◻ Prefer not to say at this time

5. What sex were you assigned at birth on your original birth certificate?

- ◻ Female (assigned female at birth)
- ◻ Male (assigned male at birth)
- ◻ Unknown

6. Please select the sexual orientation that best describes which gender(s) you are attracted to:

- ◻ Straight
- ◻ Gay
- ◻ Lesbian
- ◻ Bisexual
- ◻ Other _____
- ◻ I do not want to answer at this time

7. Is there a different name that you would like us to use when talking with you? If so, indicate below.

_____

8. What pronouns do you use?

- ◻ She/her/hers
- ◻ He/him/his
- ◻ They/them/theirs
- ◻ Other: _____

9. Housing Status: Please select your current housing situation

- ◻ Homeless Shelter
- ◻ Transitional
- ◻ Doubling Up
- ◻ Permanent Supportive Housing
- ◻ Street
- ◻ Not Homeless
- ◻ I don't know
- ◻ Prefer not to answer
- ◻ Other

Public Housing: ◻ Yes ◻ No

10. Worker Status: Please select your current work status.

- ◻ Migrant worker
- ◻ Seasonal worker
- ◻ Not Migrant/Seasonal
- ◻ Prefer not to answer

11. Would you consider yourself to have a disability?

- ◻ Yes
- ◻ No
- ◻ I don't know
- ◻ I would prefer not to answer

12. Veteran Status: Would you consider yourself a veteran?

- ◻ Yes
  If yes, have you been discharged? ◻ Yes ◻ No
  If yes, discharge date: _____
- ◻ No
- ◻ Prefer not to answer

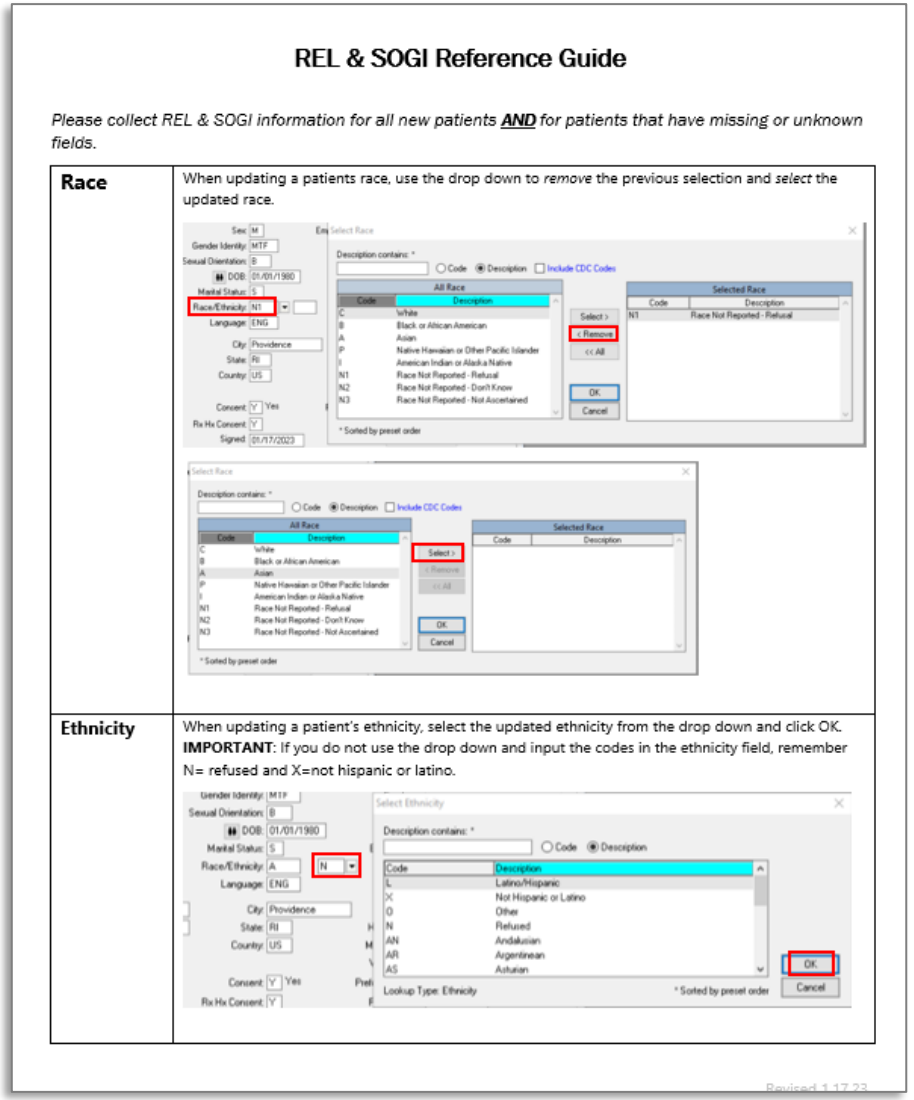
13. Refugee Status: Would you consider yourself as a person seeking refuge?

- ◻ Yes
  If yes, country of origin: _____
- ◻ No
- ◻ Prefer not to answer

Development of Intervention

EHR Reference Guide

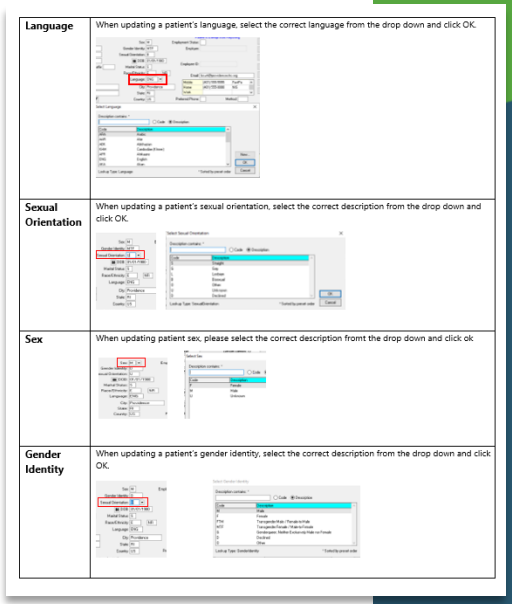
- Race
- Ethnicity
- Language
- Sexual Orientation
- Sex
- Gender Identity
- Preferred Name
- Pronouns
- Special Population Information
  - Homelessness
  - Public Housing
  - Worker status (migratory/seasonal)
  - Disability status
  - Refugee status
  - Veteran status
- Income



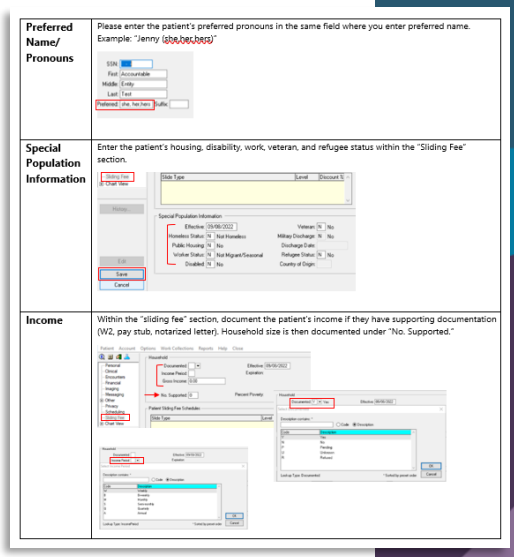
REL & SOGI Reference Guide

*Please collect REL & SOGI information for all new patients **AND** for patients that have missing or unknown fields.*

Race	When updating a patients race, use the drop down to *remove* the previous selection and *select* the updated race.
Ethnicity	When updating a patient's ethnicity, select the updated ethnicity from the drop down and click OK. **IMPORTANT**: If you do not use the drop down and input the codes in the ethnicity field, remember N= refused and X=not hispanic or latino.



Language	When updating a patient's language, select the correct language from the drop down and click OK.
Sexual Orientation	When updating a patient's sexual orientation, select the correct description from the drop down and click OK.
Sex	When updating patient sex, please select the correct description fromt the drop down and click ok
Gender Identity	When updating a patient's gender identity, select the correct description from the drop down and click OK.



Preferred Name/ Pronouns	Please enter the patient's preferred pronouns in the same field where you enter preferred name. Example: "Jenny (she her hers)"
Special Population Information	Enter the patient's housing, disability, work, veteran, and refugee status within the "Sliding Fee" section.
Income	Within the "sliding fee" section, document the patient's income if they have supporting documentation (W2, pay stub, notarized letter). Household size is then documented under "No. Supported."

Development of Intervention

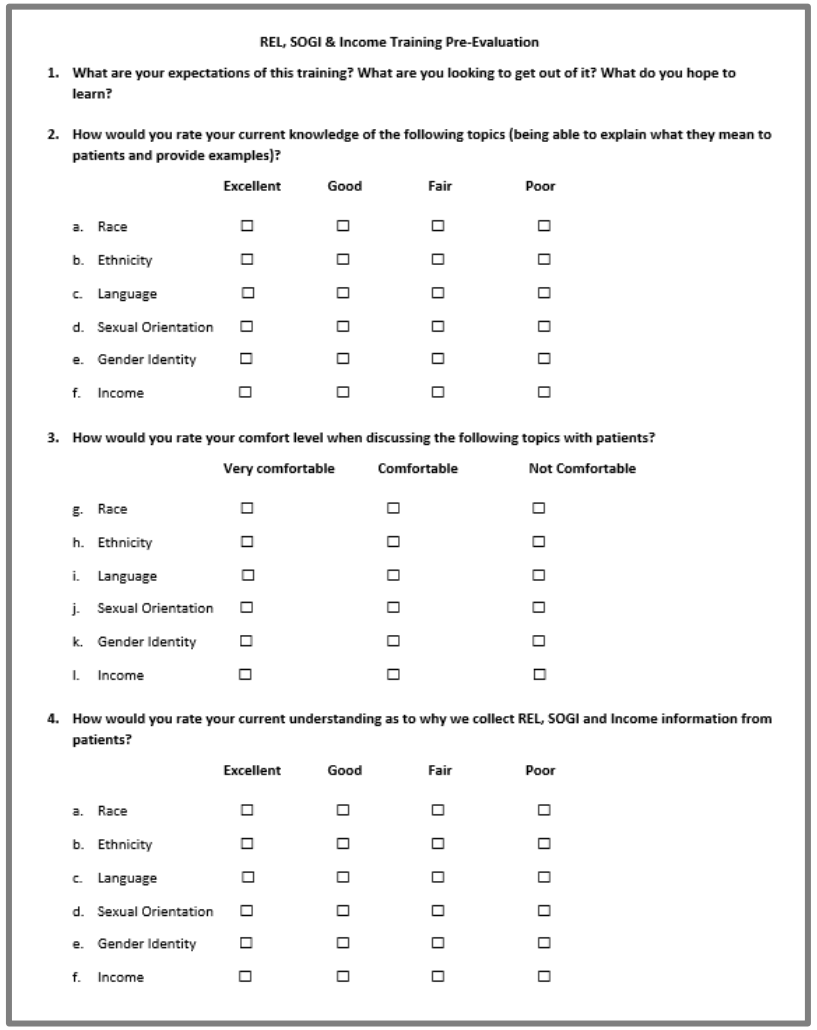
Pre & Post Training Assessment

Assessed:

- Expectations
- Current Knowledge
- Comfort
- Understanding

For the following areas:

- Race
- Ethnicity
- Language
- Sexual Orientation
- Gender Identity
- Income



REL, SOGI & Income Training Pre-Evaluation

1. What are your expectations of this training? What are you looking to get out of it? What do you hope to learn?
2. How would you rate your current knowledge of the following topics (being able to explain what they mean to patients and provide examples)?

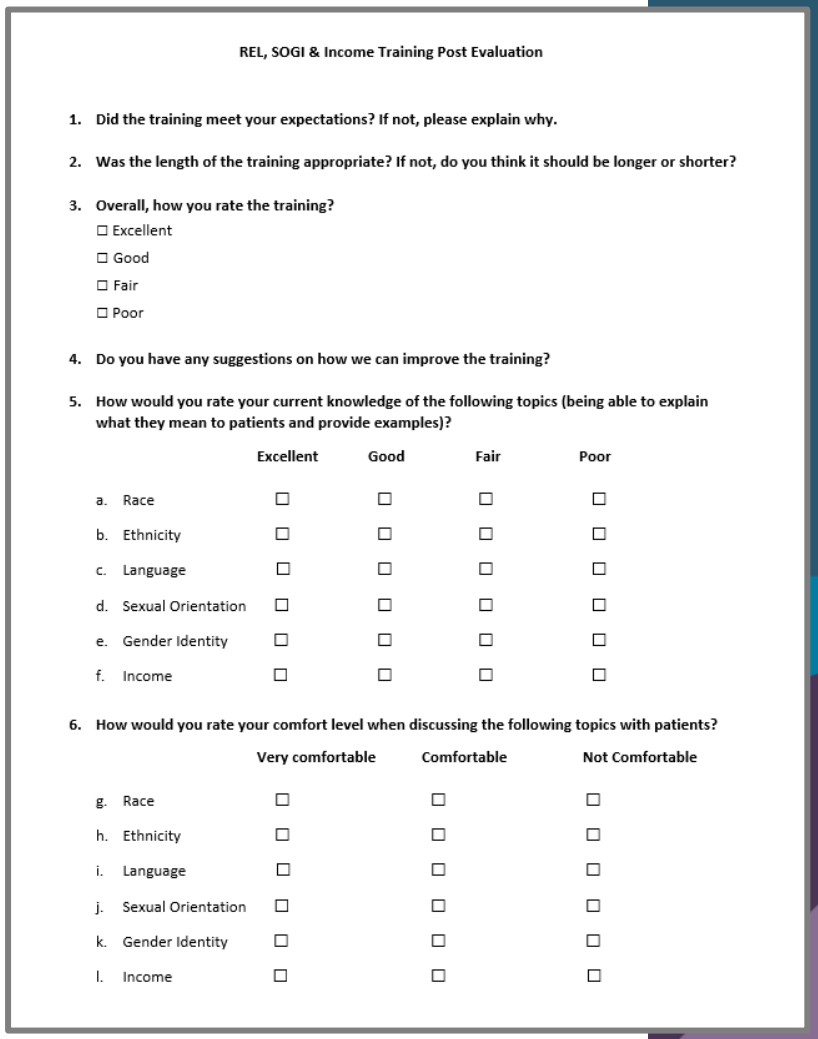
	Excellent	Good	Fair	Poor
a. Race	☐	☐	☐	☐
b. Ethnicity	☐	☐	☐	☐
c. Language	☐	☐	☐	☐
d. Sexual Orientation	☐	☐	☐	☐
e. Gender Identity	☐	☐	☐	☐
f. Income	☐	☐	☐	☐

3. How would you rate your comfort level when discussing the following topics with patients?

	Very comfortable	Comfortable	Not Comfortable
g. Race	☐	☐	☐
h. Ethnicity	☐	☐	☐
i. Language	☐	☐	☐
j. Sexual Orientation	☐	☐	☐
k. Gender Identity	☐	☐	☐
l. Income	☐	☐	☐

4. How would you rate your current understanding as to why we collect REL, SOGI and Income information from patients?

	Excellent	Good	Fair	Poor
a. Race	☐	☐	☐	☐
b. Ethnicity	☐	☐	☐	☐
c. Language	☐	☐	☐	☐
d. Sexual Orientation	☐	☐	☐	☐
e. Gender Identity	☐	☐	☐	☐
f. Income	☐	☐	☐	☐



REL, SOGI & Income Training Post Evaluation

1. Did the training meet your expectations? If not, please explain why.
2. Was the length of the training appropriate? If not, do you think it should be longer or shorter?
3. Overall, how you rate the training?
   - ☐ Excellent
   - ☐ Good
   - ☐ Fair
   - ☐ Poor
4. Do you have any suggestions on how we can improve the training?
5. How would you rate your current knowledge of the following topics (being able to explain what they mean to patients and provide examples)?

	Excellent	Good	Fair	Poor
a. Race	☐	☐	☐	☐
b. Ethnicity	☐	☐	☐	☐
c. Language	☐	☐	☐	☐
d. Sexual Orientation	☐	☐	☐	☐
e. Gender Identity	☐	☐	☐	☐
f. Income	☐	☐	☐	☐

6. How would you rate your comfort level when discussing the following topics with patients?

	Very comfortable	Comfortable	Not Comfortable
g. Race	☐	☐	☐
h. Ethnicity	☐	☐	☐
i. Language	☐	☐	☐
j. Sexual Orientation	☐	☐	☐
k. Gender Identity	☐	☐	☐
l. Income	☐	☐	☐

Development of Intervention

Operational Considerations

- Oversite & Accountability
- Trained Front Desk Supervisors to provide onsite oversite to front desk staff (PSRs) utilizing exception report data
    - Real time site support by team
- New Hire Training: REL, SOGI, & Income training was modified to be more generalizable to all new hires onboarding with PCHC and incorporated within Day 1 HR orientation
    - Connection to PCHC's Mission, Vision, & Values

REL, SOGI, & Income Data

REL, SOGI, & Income Data

Front Desk Exception Report, Site Exception Report

- **Report Development Objectives**

Quantitatively track the completion rate of demographic information collection from both a front desk individual data and site-wide data perspective.

- **Introduction to Exception Reports**

By counting the amount of exception check-in data or missing demographic data collected by front-desk, we calculate the completion rate of REL, SOGI, and Income data collection.

REL, SOGI, & Income Data

○ Data Query Logic for Exception Report

To identify missing demographic information, the following data query logic will be used for the Exception Report:

Race: When the variable "Race" has a value of NULL or "Unreported", the corresponding data will be counted as an exception value.

Ethnicity: When the variable "Ethnicity" has a value of NULL, "Not Reported", or "Refused", the corresponding data will be counted as an exception value.

Language/Gender Identity/Sexual Orientations/Poverty Percent: When these variables have a value of NULL, the corresponding data will be counted as an exception value.

Income Effective Year: When the variable "Income Effective Year" is greater than 1 or the variable "Income Effective Date" has a value of NULL, the corresponding data will be counted as an exception value.

REL, SOGI, & Income Data

Front Desk Exception Report

Report data time period: 3/19/2023 - 3/25/2023																
Staff Name	Sites	Check in Count	Ethnicity Missing Count	Eth % Completed	Race Missing Count	Race % Completed	Language Missing Count	Language % Completed	GI Missing Count	GI % Completed	SO Missing Count	SO % Completed	PP Missing Count	PP % Completed	IEY_ Exception	IEY_ Exception -% Completed
John Doe	Atwood	1	0	100.00%	0	100.00%	0	100.00%	0	100.00%	0	100.00%	1	0.00%	0	100.00%
Jane Doe	Atwood	57	3	94.74%	0	100.00%	0	100.00%	7	87.72%	8	85.96%	16	71.93%	0	100.00%
Maria Smith	Atwood	101	3	97.03%	0	100.00%	0	100.00%	11	89.11%	11	89.11%	65	35.64%	0	100.00%
Manny Smith	Atwood	28	2	92.86%	0	100.00%	0	100.00%	2	92.86%	2	92.86%	19	32.14%	0	100.00%
X	Atwood	9	2	77.78%	0	100.00%	0	100.00%	1	88.89%	1	88.89%	8	11.11%	0	100.00%
X	Atwood	113	5	95.58%	4	96.46%	0	100.00%	13	88.50%	13	88.50%	42	62.83%	4	96.46%
X	Atwood	94	7	92.55%	0	100.00%	0	100.00%	2	97.87%	2	97.87%	59	37.23%	0	100.00%
X	Atwood	32	0	100.00%	1	96.88%	0	100.00%	7	78.13%	9	71.88%	9	71.88%	3	90.63%
X	Atwood	79	3	96.20%	1	98.73%	0	100.00%	5	93.67%	6	92.41%	51	35.44%	0	100.00%
X	Atwood	1	0	100.00%	0	100.00%	0	100.00%	0	100.00%	0	100.00%	1	0.00%	0	100.00%
X	Atwood	11	2	81.82%	0	100.00%	0	100.00%	2	81.82%	2	81.82%	8	27.27%	0	100.00%
X	Atwood	12	2	83.33%	0	100.00%	0	100.00%	4	66.67%	4	66.67%	6	50.00%	0	100.00%
X	Atwood	1	0	100.00%	0	100.00%	0	100.00%	0	100.00%	0	100.00%	1	0.00%	0	100.00%

REL, SOGI, & Income Data

Baseline Site Exception Report

Data period: 08/28/22-09/03/22

Site	Total Checkin Count	Ethnicity Missing Count	Eth Complete %	Race Missing Count	Race Complete %	Language Missing Count	Language Complete %	GI Missing Count	GI Complete %	SO Missing Count	SO Complete %	PP Missing Count	PP Complete %	IEY Exception Count	IEY Complete %
Prairie	1516	121	92%	525	65%	0	100%	686	55%	755	50%	978	35%	400	74%
Atwood	684	38	94%	57	92%	0	100%	340	50%	376	45%	491	28%	50	93%
Crossroads	49	6	88%	4	92%	0	100%	28	43%	34	31%	4	92%	0	100%
Roger	35	4	89%	3	91%	0	100%	6	83%	6	83%	18	49%	3	91%
North	43	4	91%	3	93%	0	100%	18	58%	21	51%	39	9%	1	98%
Capitol	644	74	89%	98	85%	0	100%	177	73%	200	69%	481	25%	10	98%
Mount	41	8	80%	17	59%	0	100%	24	41%	24	41%	36	12%	6	85%
Central	492	24	95%	29	94%	0	100%	43	91%	49	90%	374	24%	3	99%
Chafee	666	62	91%	112	83%	0	100%	385	42%	426	36%	545	18%	4	99%
Olneyville	223	17	92%	12	95%	1	100%	132	41%	141	37%	168	25%	8	96%
Hepatitis	3	0	100%	1	67%	0	100%	1	67%	2	33%	3	0%	0	100%
Randall	642	60	91%	55	91%	0	100%	103	84%	120	81%	503	22%	4	99%
	PCHC Averages		**90.94%**		**83.89%**		**99.96%**		**60.65%**		**53.98%**		**28.28%**		**94.48%**

REL, SOGI, & Income Data

Current Site Exception Report

Data period: 3/26/23 - 4/1/23

Site	Total Checkin Count	Ethnicity Missing Count	Eth Complete %	Race Missing Count	R Complete %	Language Missing Count	L Complete %	GI Missing Count	GI Complete %	SO Missing Count	SO Complete %	PP Missing Count	PP Complete %	IEY Exception Count	IEY Complete %
Prairie	1747	91	94.79%	86	95.08%	0	100.00%	396	77.33%	443	74.64%	750	57.07%	226	87.06%
Atwood	783	41	94.76%	11	98.60%	0	100.00%	60	92.34%	75	90.42%	375	52.11%	17	97.83%
Randall Specialty	161	7	95.65%	7	95.65%	0	100.00%	20	87.58%	20	87.58%	108	32.92%	3	98.14%
PCHC Case	2	0	100.00%	0	100.00%	0	100.00%	0	100.00%	0	100.00%	1	50.00%	0	100.00%
Crossroads	54	1	98.15%	0	100.00%	0	100.00%	0	100.00%	1	98.15%	2	96.30%	0	100.00%
Roger	62	0	100.00%	0	100.00%	0	100.00%	0	100.00%	0	100.00%	1	98.39%	0	100.00%
North	36	1	97.22%	0	100.00%	0	100.00%	2	94.44%	2	94.44%	34	5.56%	0	100.00%
Capitol	683	48	92.97%	10	98.54%	0	100.00%	34	95.02%	38	94.44%	396	42.02%	1	99.85%
Mount	74	6	91.89%	4	94.59%	0	100.00%	6	91.89%	6	91.89%	11	85.14%	5	93.24%
Central	681	17	97.50%	3	99.56%	0	100.00%	8	98.83%	11	98.38%	359	47.28%	3	99.56%
Chafee	597	34	94.30%	21	96.48%	0	100.00%	157	73.70%	168	71.86%	340	43.05%	5	99.16%
Olneyville	380	21	94.47%	5	98.68%	0	100.00%	120	68.42%	122	67.89%	153	59.74%	4	98.95%
Prairie Dental	345	2	99.42%	2	99.42%	0	100.00%	12	96.52%	13	96.23%	32	90.72%	6	98.26%
Crossroads Dental	90	9	90.00%	8	91.11%	0	100.00%	24	73.33%	26	71.11%	66	26.67%	12	86.67%
Hepatitis	4	1	75.00%	0	100.00%	0	100.00%	1	75.00%	2	50.00%	1	75.00%	0	100.00%
Randall	550	32	94.18%	1	99.82%	0	100.00%	15	97.27%	20	96.36%	330	40.00%	4	99.27%
George	49	0	100.00%	0	100.00%	0	100.00%	1	97.96%	1	97.96%	4	91.84%	2	95.92%
	PCHC Averages		**95.06%**		**97.49%**		**100.00%**		**86.41%**		**84.95%**		**52.95%**		**95.43%**

REL, SOGI, & Income Data

Results

Ethnicity:

4.12 % increase

Race:

13.6 % increase

Gender Identity:

25.76 % increase

Sexual Orientation:

30.97 % increase

Income:

24.67% increase

Data period: 08/28/22-09/03/22

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Randall Specialty	161	7	95.65%	7	95.65%	0	100.00%	20	87.58%	20	87.58%	108	32.92%	3	98.14%
PCHC Case	2	0	100.00%	0	100.00%	0	100.00%	0	100.00%	0	100.00%	1	50.00%	0	100.00%
Crossroads	54	1	98.15%	0	100.00%	0	100.00%	0	100.00%	1	98.15%	2	96.30%	0	100.00%
Roger	62	0	100.00%	0	100.00%	0	100.00%	0	100.00%	0	100.00%	1	98.39%	0	100.00%
North	36	1	97.22%	0	100.00%	0	100.00%	2	94.44%	2	94.44%	34	5.56%	0	100.00%
Capitol	683	48	92.97%	10	98.54%	0	100.00%	34	95.02%	38	94.44%	396	42.02%	1	99.85%
Mount	74	6	91.89%	4	94.59%	0	100.00%	6	91.89%	6	91.89%	11	85.14%	5	93.24%
Central	681	17	97.50%	3	99.56%	0	100.00%	8	98.83%	11	98.38%	359	47.28%	3	99.56%
Chafee	597	34	94.30%	21	96.48%	0	100.00%	157	73.70%	168	71.86%	340	43.05%	5	99.16%
Olneyville	380	21	94.47%	5	98.68%	0	100.00%	120	68.42%	122	67.89%	153	59.74%	4	98.95%
Prairie Dental	345	2	99.42%	2	99.42%	0	100.00%	12	96.52%	13	96.23%	32	90.72%	6	98.26%
Crossroads Dental	90	9	90.00%	8	91.11%	0	100.00%	24	73.33%	26	71.11%	66	26.67%	12	86.67%
Hepatitis	4	1	75.00%	0	100.00%	0	100.00%	1	75.00%	2	50.00%	1	75.00%	0	100.00%
Randall	550	32	94.18%	1	99.82%	0	100.00%	15	97.27%	20	96.36%	330	40.00%	4	99.27%
George	49	0	100.00%	0	100.00%	0	100.00%	1	97.96%	1	97.96%	4	91.84%	2	95.92%
	PCHC Averages		**95.06%**		**97.49%**		**100.00%**		**86.41%**		**84.95%**		**52.95%**		**95.43%**

Pre and Post Training Assessment Data

Pre and Post Training Assessments

Knowledge Attainment

89 Staff Responses

Post training data on staff that reported excellent or good knowledge of the following:

Race: 28.1% increase

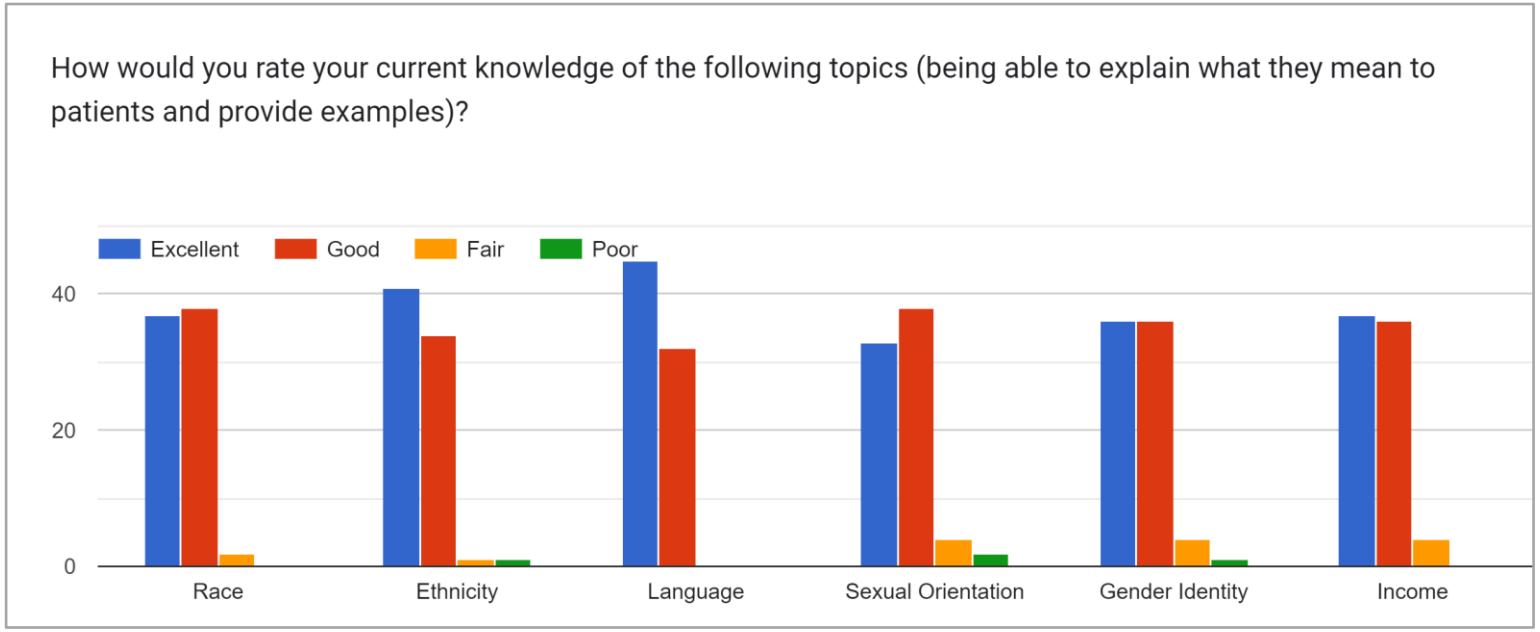
Ethnicity: 32.5% increase

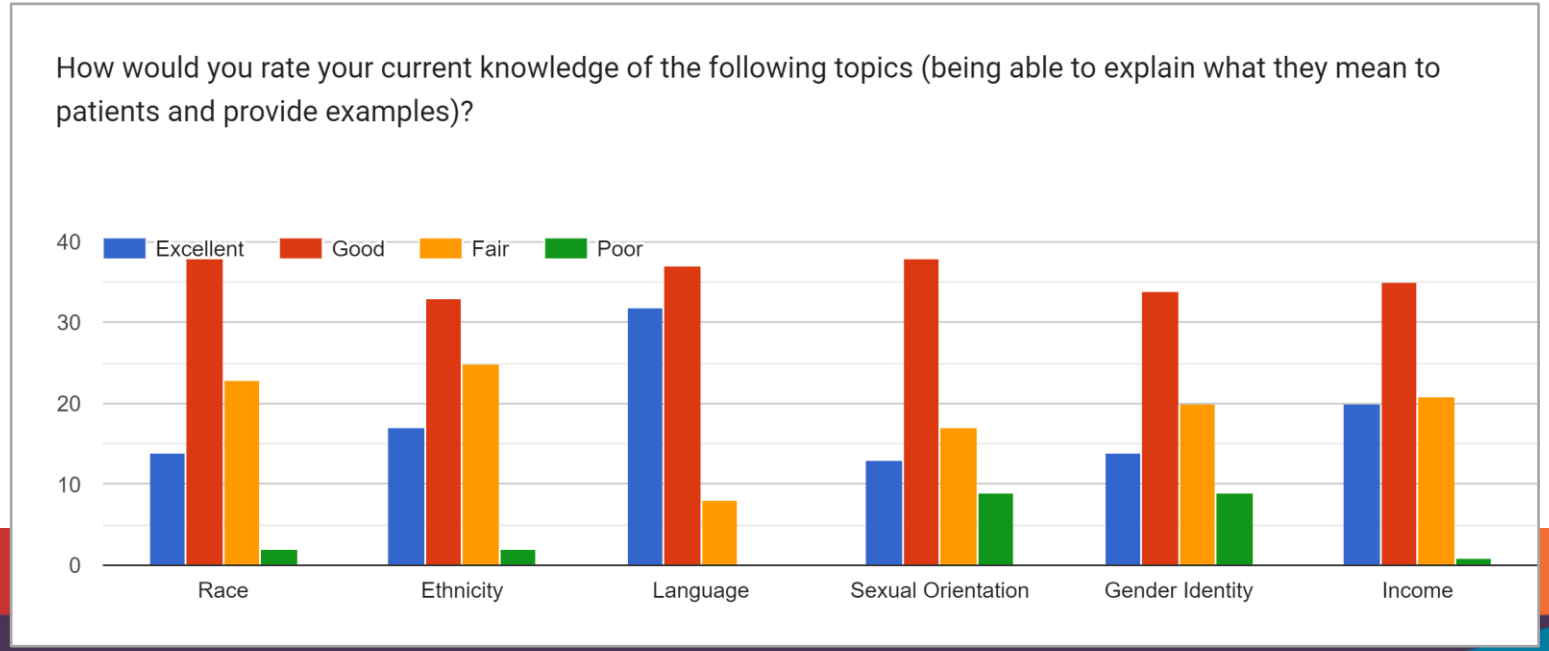
SO: 23% increase

GI: 29.2% increase

Income: 21.3% increase

100% of staff reported the training met their expectations





Pre and Post Training Assessments

Comfort Level

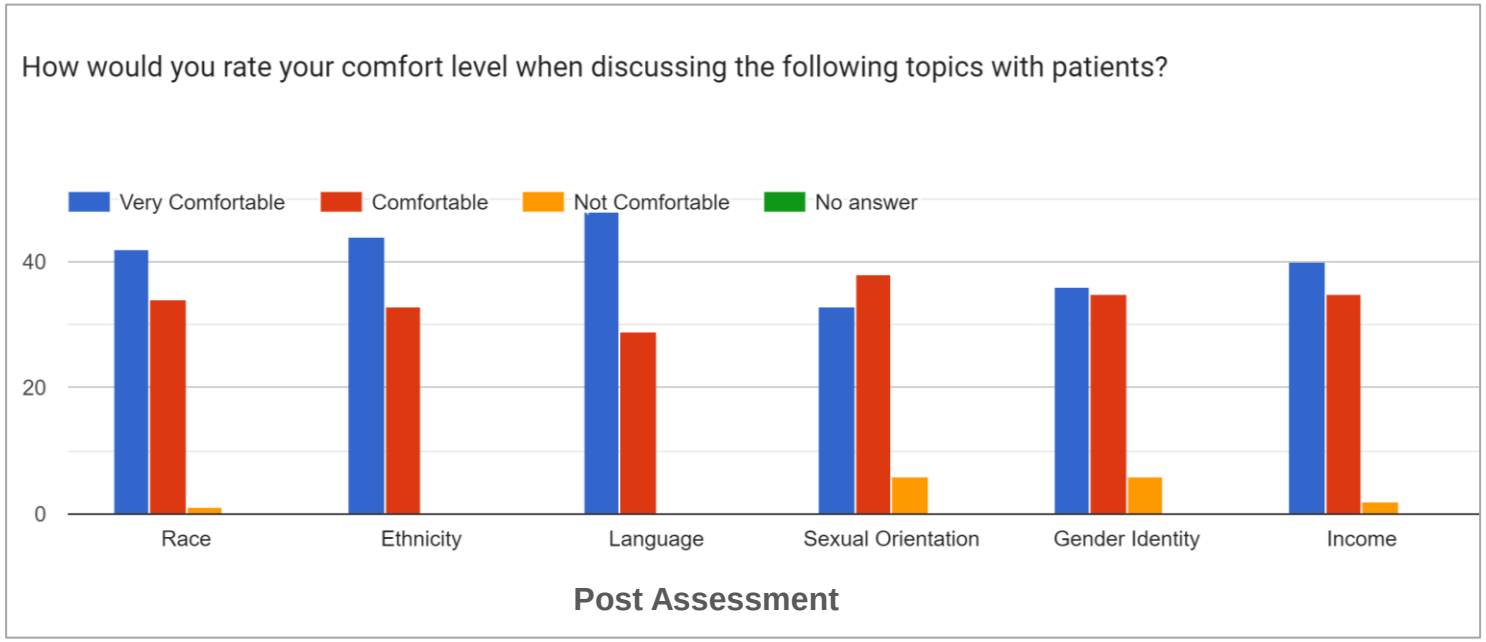
Post training data on staff that reported Very Comfortable or Comfortable level when discussing the following:

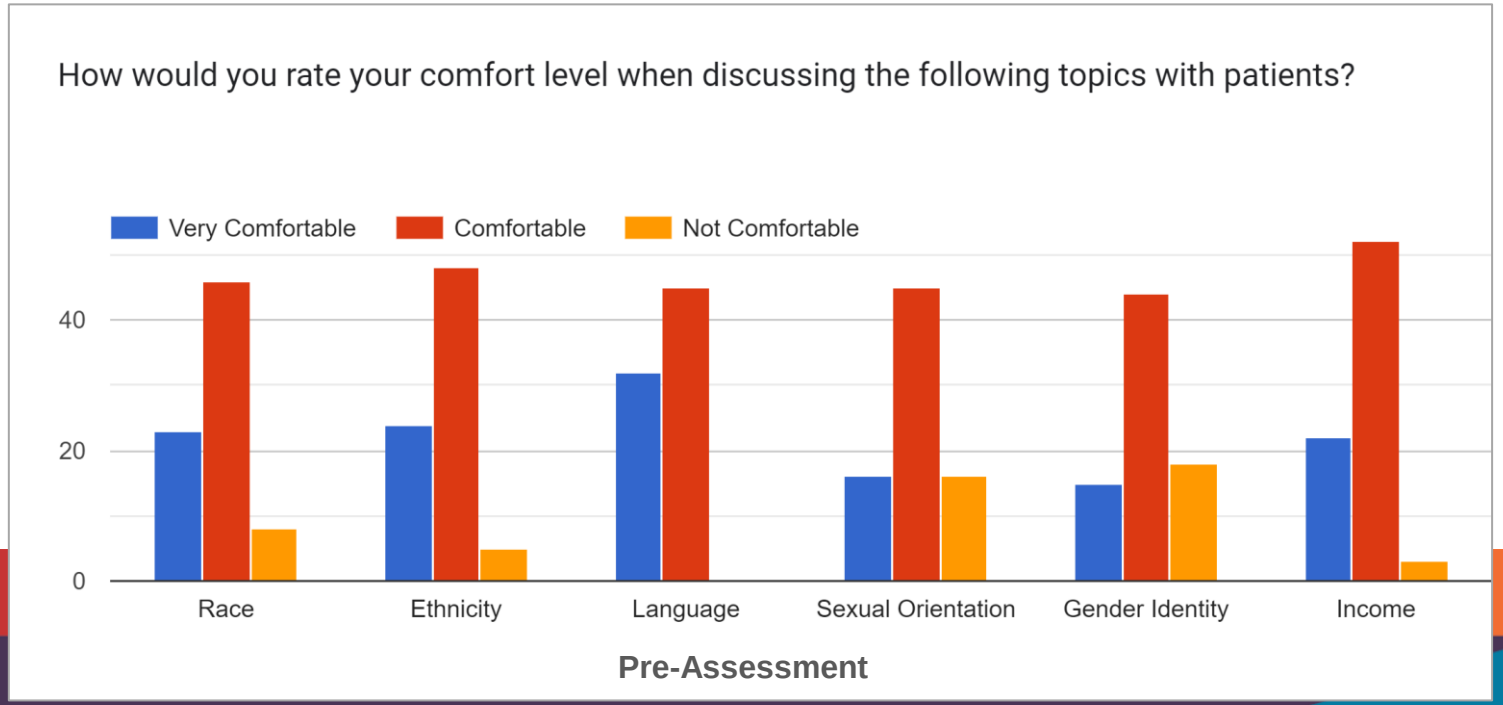
Race: 7.8% increase

Ethnicity: 5.6% increase

SO: 13.9% increase

GI: 16.8% increase





Pre and Post Training Assessments

Understanding

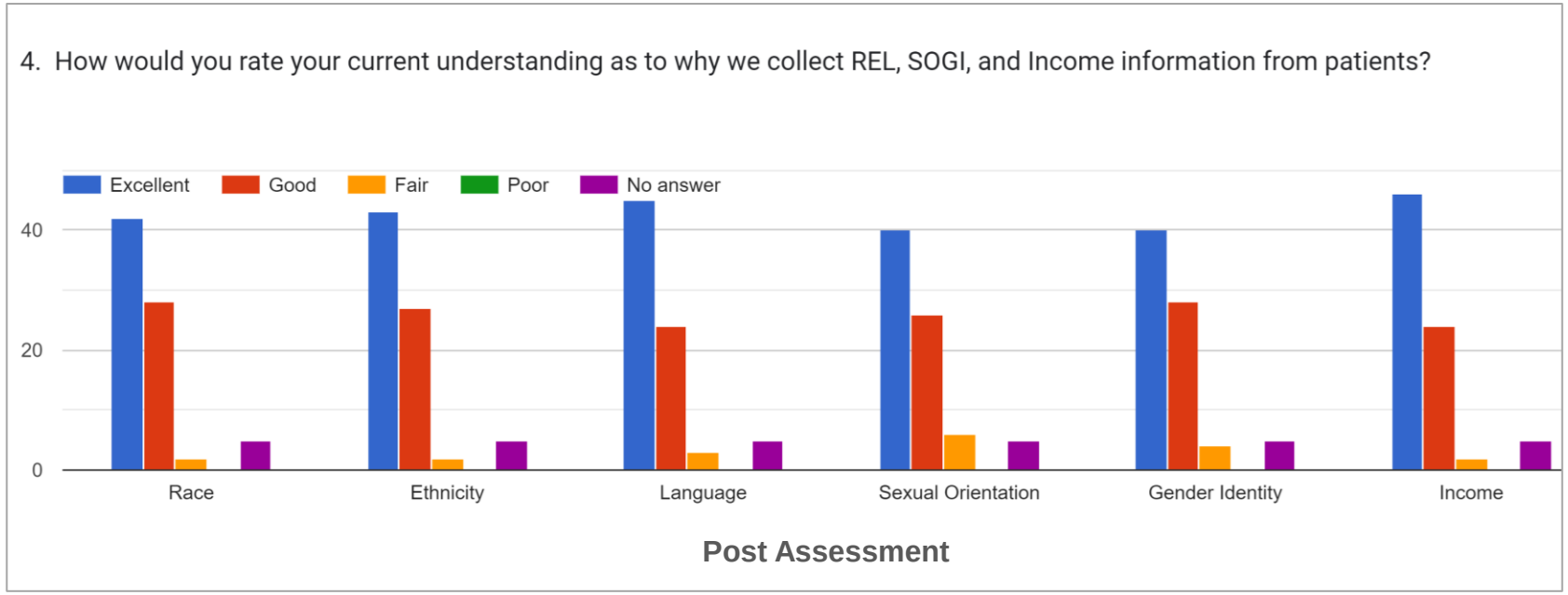
Post training data on staff that reported Excellent or Good undertraining of why we collect REL, SOGI, & Income Information from patients:

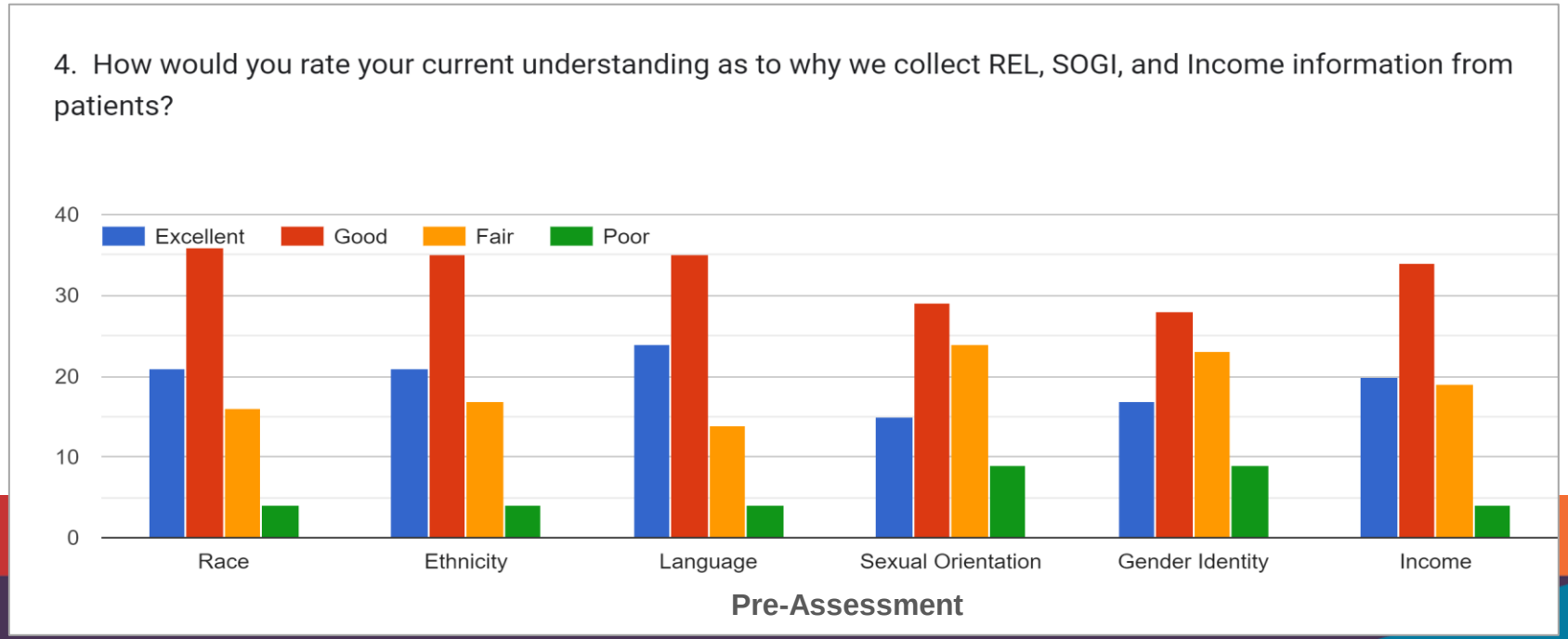
Race: 26.9% increase

Ethnicity: 5.7% increase

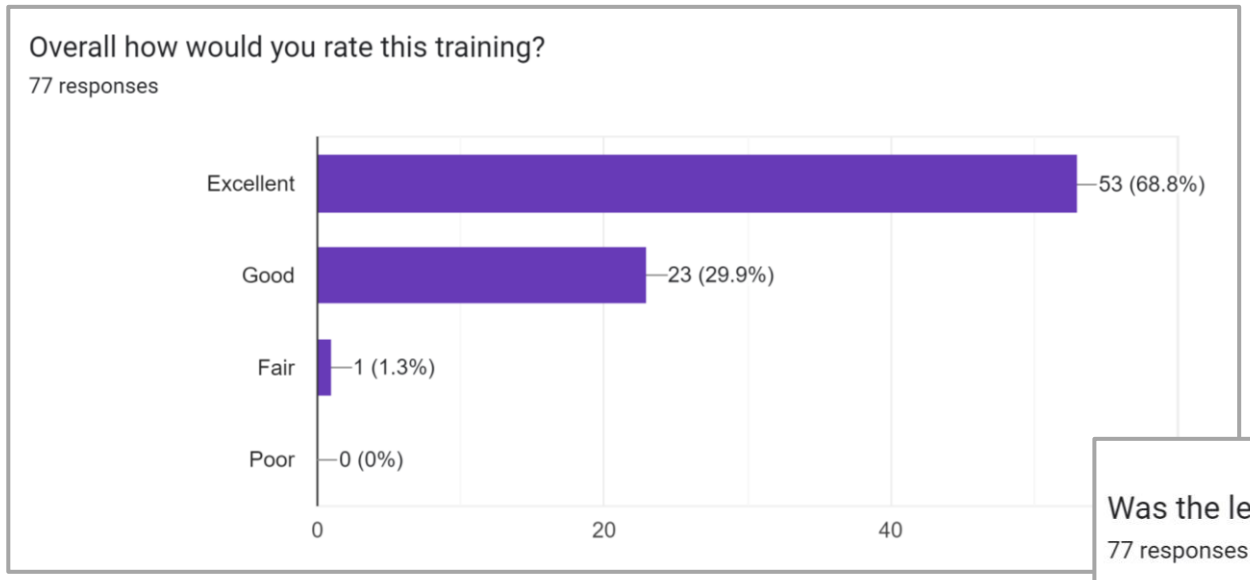
SO: 15.7% increase

GI: 16.7% increase



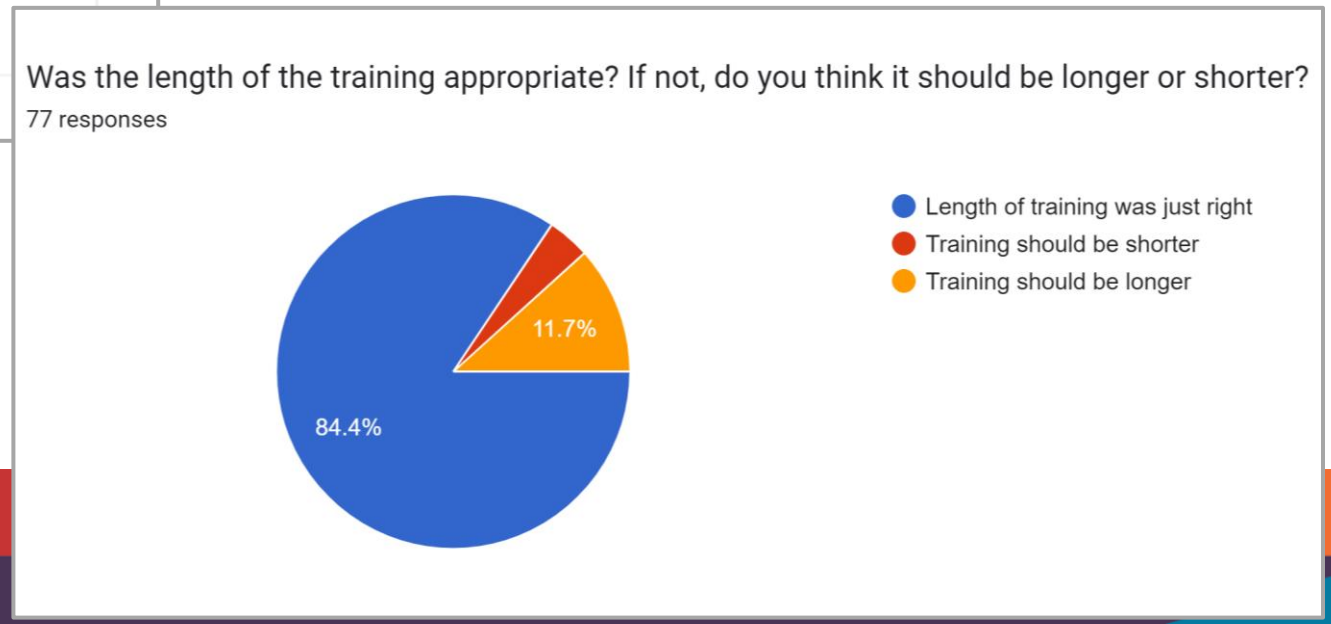


Post Training Assessments



Recommendations:

- Yearly refresher trainings
- Front desk data collection is a time-consuming process
- More privacy for patients
- Still confused about race



Project Next Steps

- Expanding SOGI data collection to pediatric population once privacy of information is ensured within EHR
- Adjusting REL, SOGI, & Income data collection to meet 2023 recommended standards set by UDS
- Creation of care team/role specific trainings to support ongoing development of knowledgebase
- Transition to Epic in October, and modifying current front desk workflow
    - SOGI asked during patient workup within Epic and not at front desk check-in
- Now that we have high quality data on our patient population, assessing what the trends showing us
- Ongoing evaluation of data and identifying what is missing and what still needs to be worked on

Questions & Answers

Invite questions from the audience.