

### Modernizing Demographic Data Standards to Advance Health Equity

Summary of Consensus-based Recommendations for Voluntary Consideration

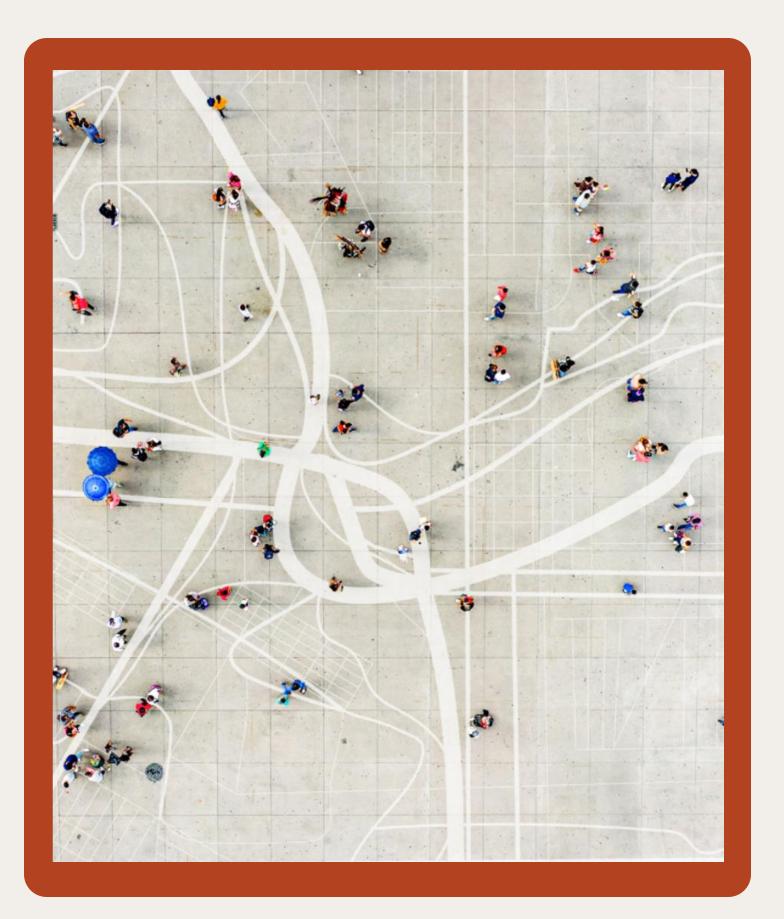
July 30, 2024

\*This meeting is being recorded and a replay will be publicly posted.



## Meet the Program Partner Organizations





## **ABOUT CIVITAS**

<u>Civitas Networks for Health</u> is a national collaborative comprised of over 175 member organizations working to use health information exchange, health data, and multi-stakeholder, cross-sector approaches to improve health.

Civitas educates, promotes, and influences both the private sector and policymakers on matters of interoperability, quality, coordination, health equity, and cost-effectiveness of health care. The network supports local health innovators by amplifying their voices at the national level and increasing the exchange of valuable resources, tools, and ideas.



**Civitas Networks for Health** 





### Health Level Seven® International (HL7®)

- organization (SDO).

### Vision

### Mission

interoperability.

Not-for-profit, ANSI-accredited standards development

Dedicated to providing a comprehensive framework and related standards for the exchange, integration, sharing, and retrieval of electronic health information that supports clinical practice and the management, delivery and evaluation of health services.

• A world in which everyone can securely access and use the right health data when and where they need it.

• To provide standards that empower global health data

Education on Demand: HL7® training Straight from the Source





### **About AHIP**

AHIP is the national association whose members provide health care coverage, services, and solutions to hundreds of millions of Americans every day. We are committed to market-based solutions and publicprivate partnerships that make health care better and coverage more affordable and accessible for everyone.

Visit <u>www.ahip.org</u> to learn how working together, we are Guiding Greater Health.



## Overview, Rationale, and Goals of This Work



## **Challenges with Demographic Data Collection**

### Inaccurate, Incomplete Data

- Responses to surveys low
- Answers are often missing, or individuals chose "Other," or "Unknown"
- Not all necessary domains are covered

### Lack of Interoperability

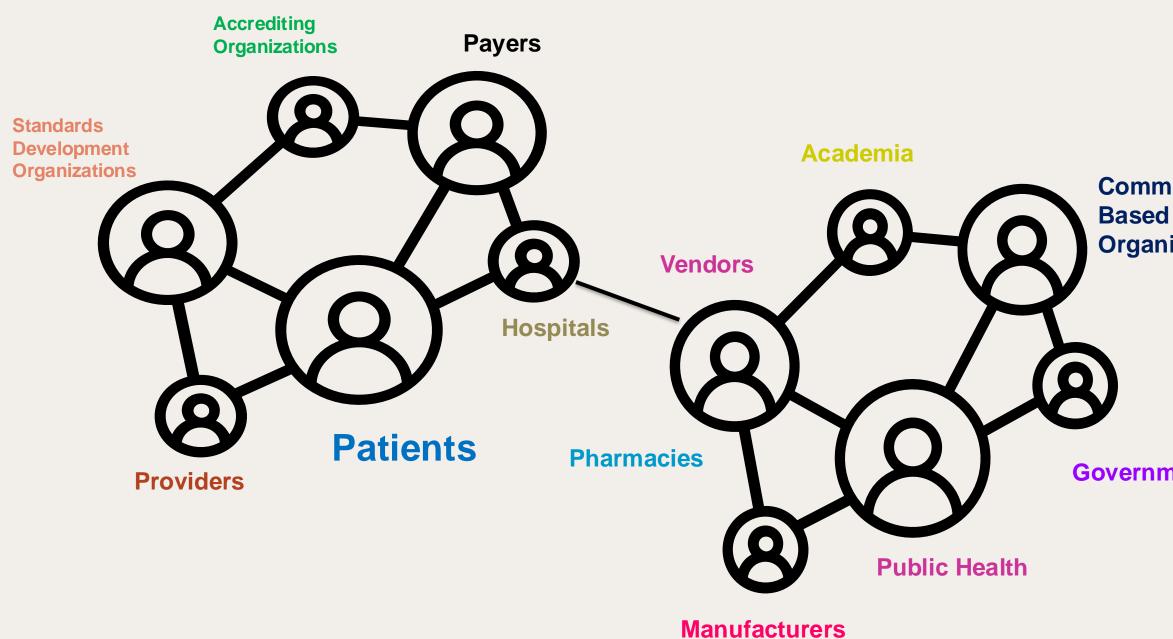
- Multiple standards that
  do not align
- Significant Resources
  Invested
- Multiple stakeholders are collecting the same data

### Process Not Patient-Centric

- Data not inclusive of how people identify
- Patients must answer questions repeatedly
- Leads to Patient Burden
- Leads to Mistrust



### Standards Will Be Most Effective if Adopted Across the Healthcare Ecosystem



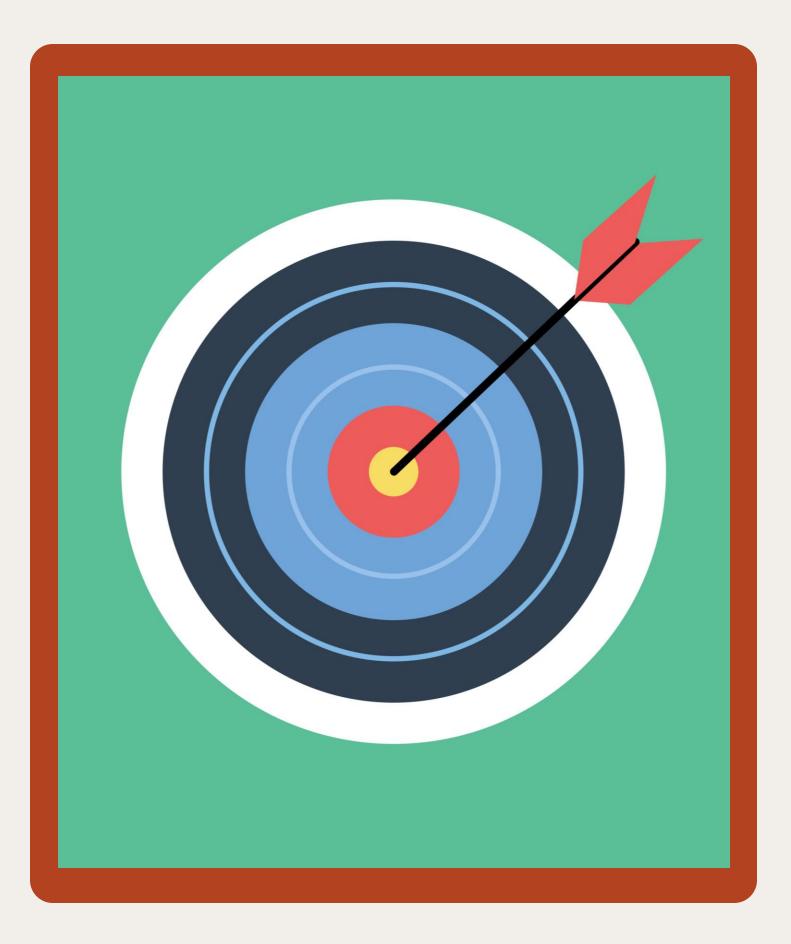
Community **Organizations** 

#### Government

#### **Stakeholders represented:**

- 15 Patient/Consumer/Community Groups
- 20 Regional & National Medical Associations
- 10 Provider Groups
- 22 Hospitals/Health Systems/Community Health Centers
- 19 Public and Private Payers
- 8 Federal Agencies
- 5 Measure Developers
- **10 Software Solutions Companies**
- 12 Health Information Exchanges
- 7 Regional Health Improvement Collaboratives
- 3 Quality Improvement Organizations
- 6 Purchasers/Employer Groups





### **Demographic Data Element Modernization (DEMo) Initiative**

### **Mission**:

### Goal:

alignment across stakeholders.

### **Objective**:

• Advance Health Equity through Better Demographic Data.

• Modernize and enhance national demographic data content and exchange standards so that they are culturally sensitive and sufficiently granular that allow for

• Facilitate the collection of accurate, complete, comparable, actionable, and interoperable data that supports better outcomes, fewer disparities, improved patient trust, and enhanced operational efficiency.



### **How We'll Get There:**



### **1. Align Data Elements**

- Race and Ethnicity ۲
- Sexual Orientation & Gender ٠
- **Disability Status** ٠
- Language Preference •
- **Military Experience**
- Spirituality ٠

### 2. Test & Prepare

- Conduct cognitive testing
- Educate on HL7 process •
- Prepare HL7 application •

### **3. Build Standards**

- Utilize HL7 standards development process.
- Explore development of • FHIR Questionnaire
- Revise or develop new HL7 Implementation Guides (IGs).

# TBD Phase

### 4. Pilot

- Pilot test •
- Harvest lessons learned
- Develop materials for putting • standards into practice



## Findings from the National Virtual Focus Groups



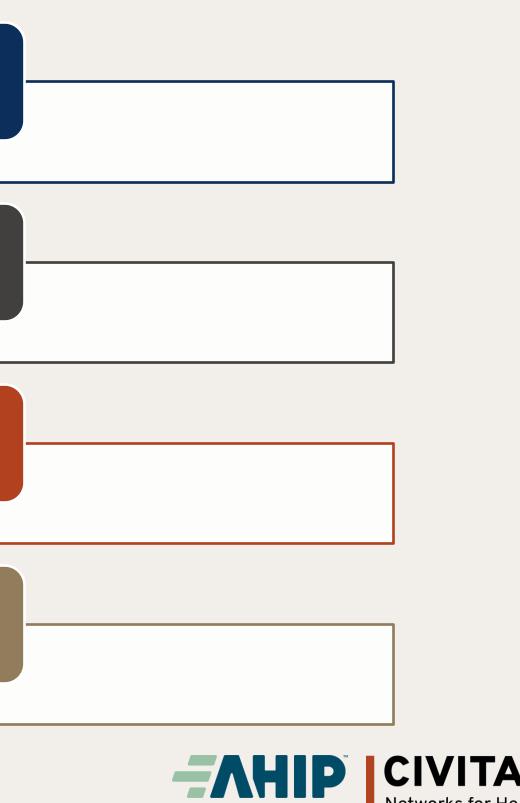
## **Guiding Principles**

Align with National Questionnaires but Improve Upon Them When Necessary

Standardize at High-Level while Allowing for Local Customization

Aim for Actionability while Minimizing Data Burden

Focus on Demographic Characteristics Not Health-Related Social Needs





## **Domains of Focus for Inclusive Representation of Identity**

Race	Ethnicity
Sexual Orientation	Gender
Relationship Status	<b>Disability Status</b>

**Spiritual Beliefs** 

#### Language Preference

### Pronouns

### **Military Experience**



### **Overarching Discussion Themes**

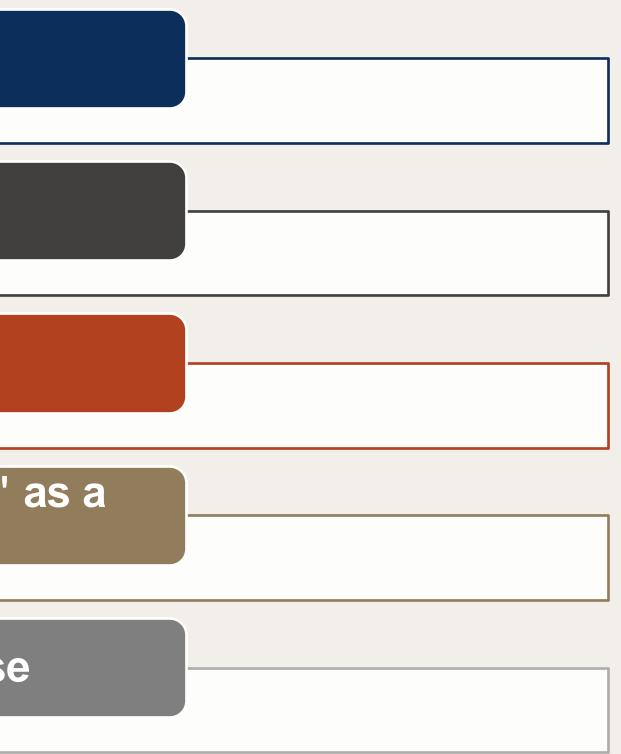
How Granular to Make Response Choices

How to Order Response Choices

**Use of Terms and When to Explain Terms** 

Whether and Where to Include "I Do Not Know" as a Response

How to Appropriately Word "Write-In" Response





## **Race and Ethnicity**





## Introduction and Definitions for Race and Ethnicity

• Thank you for taking the time to answer these questions. The following questions will ask you to identify your race and/or ethnicity. Race is one way our society groups people together. Categories of race have been made up over time. These categories are often based on things we can see, like a person's skin color, but do not indicate real biological differences. Ethnicity is based on how we identify with other people when we share certain experiences or backgrounds with them. This may include things like language, history, religion, or culture. There is also an optional question that will ask you about your specific race and/or ethnicity. We recognize that these are personal questions and there is an option to not respond. Your care will NOT be affected in any way should you choose not to respond.



## Version 2: Race and Ethnicity

# 1. Please tell us which race(s) and/or ethnicities you identify with: (select all that apply)

- Asian or Asian American
- Black, African, or African American
- Hispanic or Latino/a/e
- Middle Eastern or North African
- Native American, Alaska Native, or Indigenous
- Native Hawaiian or Pacific Islander
- White or European
- I don't know
- I choose not to respond at this time



### **Version 2: Race and Ethnicity at More Granular-Level**

### **OPTIONAL: 1A. Please tell us your background.** Check all that apply. (If your background is not listed, please let us know by writing on the

#### Asian or Asian American

- Afghan •
- Bangladeshi
- Burmese
- Cambodian
- Chinese
- Filipino
- Hmong
- Indian •
- Indonesian
- Japanese
- Korean
- Lao
- Nepalese
- Pakistani
- Sri Lankan
- Thai
- Vietnamese
- Please specify if not listed above:

- Black, African, or African American
- African American
- Angolan
- Barbadian
- Cabo Verdean •
- Congolese •
- Dominican •
- Ethiopian
- Ghanaian •
- Haitian
- Jamaican
- Kenyan •
- Liberian
- Nigerian
- Somali Sudanese
- Trinidadian
- •
- listed above:

- Hispanic or Latino
- Argentinian •
- Brazilian •
- Chilean •
- Colombian
- Costa Rican •
- Cuban •
- Dominican
- Ecuadorian
- Guatemalan
- Honduran
- Mexican • or Chicano/a
- Nicaraguan
- Panamanian •
- Peruvian
- Puerto Rican
- Salvadorian
- Venezuelan Please specify • if not listed above:

#### Middle Eastern or North African

- Egyptian
- Emirati
- Iragi
- Iranian •
- Israeli
- Jewish (Mizrahi) •
- Jordanian
- Kurdish •
- Kuwaiti •
- Lebanese
- Libyan •
- Palestinian •
- Saudi •
- Syrian
- Yemeni •
- Please specify if not listed above:

#### **Native Hawaiian** or Pacific Island

- Chuukese •
- Chamorro
- Fijian
- French Polynesian ٠
- Marshallese
- Native Hawaiian •
- Palauan
- Papua New Guinean ٠
- Samoan •
- Tongan •
- Yap
  - Please specify if not listed above:

- I don't know
- I choose not to respond at this time

**OPTIONAL 1B.** Cultural Identity: Are there things about your culture or cultural identity that you would like us to know?

Please specify if not Spanish • •

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ler		

bla	ank line).	
Ala	tive American, Iska Native, or Iigenous	V •
•	Apache	•
•	Athabascan	•
•	Aztec	•
•	Blackfeet	•
•	Cherokee	•
•	Cheyenne	•
•	Chippewa	•
•	Choctaw	•
•	Comanche	•
•	Haudenosaunee	•
•	Inupiat	•
•	Lumbee	•
•	Lingít (Tlingit)	•
•	Mayan	•
•	Muscogee (Creek)	•
•	Navajo	•
•	Osage	•
•	Sioux	•
•	Taino	
•	Yu'pik Eskimo	
•	Please specify	
	if not	
	listed above:	

#### Vhite or European

- Danish
- Dutch
- English
- French
- German
- Greek
- Irish
- Italian
- Jewish (Ashkenazi)
- Jewish (Sephardic)
- Lithuanian
- Norwegian
- Polish
- Portuguese
- Russian
- Scottish
- Swedish
- Ukrainian
- Welsh
- Please specify if not listed above:

## **Preferred Language**



## Introduction and Definitions for Language

Thank you for taking the time to answer these questions. To ensure we are doing our best to  $\bullet$ communicate in a way that is understandable, and/or connect you to available translation services, the following questions will ask you to identify which language or languages you feel most comfortable speaking, reading, and writing in when it comes to your health care. The languages listed as response options are mostly based on a 2019 American Community Survey Report that identified more common languages used in the United States, other than English. If you do not see your preferred language, there is a space to write in a response. This question is meant to inform and improve our service responses now, or in the future.



## Version 2: Language Preference – Speaking

Speaking: What language(s) do you feel most comfortable speaking about your health care? This can include a specific language and/or different types of sign language. (Granular options can be customized to local level.) Select all that apply.

- Dutch
- English
- French
- German
- Greek
- Italian •
- Pennsylvania Dutch (Pennsylvania German)
- Polish
- Portuguese
- Russian
- Spanish
- Yiddish

- Bengali
- Burmese
- Cantonese
- Dari
- Hindi
- Hmong
- Japanese
- Karen
- Karenni
- Khmer
- Korean
- Lao
- Mandarin
- Pashto
- Tagalog
- Thai
- Vietnamese

- Amharic
- Arabic
- Farsi
- Haitian Creole
- Hebrew
- Somali
- Swahili

- Chuukese
- Hawaiian
- Marshallese
- Samoan
- Tongan

- Cherokee
- Crow
- Dakota
- Inupiag
- Lakota (Sioux)
- Muscogee
- Navajo (Diné)
- Ojibwe
- O'oodham
- Western Apache
- Yu'pik
- Zuni

- American Sign Language
- Other Sign Language (please specify): \_\_\_\_
- Other Language (please specify): \_\_\_\_
- I do not know
- I choose not to • respond at this time

## Version 2: Language Preference – Reading and Writing

<u>Reading/Writing</u>: What language(s) do you prefer to use when reading materials related to your health care? This can include a specific language, Braille, large print, or digital documents that can be spoken out loud. (Granular options can be customized to local level.) Select all that apply.

- Dutch
- English
- French
- German
- Greek
- Italian
- Pennsylvania Dutch (Pennsylvania German)
- Polish
- Portuguese
- Russian
- Spanish
- Yiddish

- Bengali
- Burmese
- Cantonese
- Dari
- Hindi
- Hmong
- Japanese
- Karen
- Karenni
- Khmer
- Korean
- Lao
- Mandarin
- Pashto
- Tagalog
- Thai
- Vietnamese

- Amharic
- Arabic
- Farsi
- Haitian Creole
- Hebrew
- Somali
- Swahili

- Chuukese
- Hawaiian
- Marshallese
- Samoan
- Tongan

- Cherokee
- Crow
- Dakota
- Inupiaq
- Lakota (Sioux)
- Muscogee
- Navajo (Diné •
- Ojibwe
- O'oodham
- Western Apache
- Yu'pik
- Zuni

- Braille
- Large Print
- Digital Documents that Can Be Spoken Out Loud
- Other Language
  (please specify): \_\_\_\_
- I do not know
- I choose not to respond at this time

## Version 2: Language Preference – Setting Specifics

### **In-Person at Care Setting:**

- If an interpreter in your preferred language was available right now, would you choose to use one for your health care visit?
  - Yes
  - **No**
  - I do not know
  - I choose not to respond
- Are you comfortable using an interpreter if they are only available through:
  - Telephone: Yes or No
  - Video: Yes or No
  - In-person: Yes or No
  - I do not know
  - I choose not to respond

### **Outreach Preferences:**

- - Phone Call
  - Text Message
  - Email
  - Mailed Letter
  - I do not know
  - I choose not to respond

 How would you prefer to be contacted with information related to your health

care? Check all that apply.



## Sexual Orientation, Sex, Gender



## Introduction and Definitions for Sexual Orientation, Sex, and Gender

• Thank you for taking the time to answer these questions. The following questions will ask you how you think of yourself regarding your sexual orientation, sex, and gender. Sexual orientation means which gender you have an emotional, romantic or sexual attraction to. Sex means the sex you were assigned at birth by a doctor or midwife, based on external body parts. Gender is one's own sense of self and their gender, whether that is man, woman, neither or both. Your gender may differ from your sex assigned at birth. We recognize that these are personal questions and responses may change overtime. Your care will NOT be affected in any way should you choose not to respond.



## Version 2: Sexual Orientation

### **Sexual Orientation**

At this time, do you think of yourself as (select one):

- Asexual (little or no attraction to any gender)
- Bisexual (attracted to same gender as your own and gender different from your own)
- Gay or lesbian (attracted to the same gender as your own)
- Pansexual (attracted to any gender)
- Straight or heterosexual (attracted to gender different from your own)
- Please specify if not listed above: \_\_\_\_\_\_
- I don't know
- I choose not to respond at this time



## Version 2: Sex and Gender

### Sex

What sex were you assigned at birth on your original birth certificate? (Sex assigned at birth is the sex (male, female or intersex) that a doctor or midwife uses to describe a child at birth based on their external body parts. Select one)

- Female, Woman
- Intersex (having external body parts or reproductive organs that are not only male or female)
- Male, Man
- I choose not to respond at this time
- I do not know

While we recognize a number of genders, many legal entities unfortunately do not yet. Please be aware that the name & sex you have previously listed on your insurance must be used on documents pertaining to insurance, billing, & correspondence. If your preferred name and pronouns are different from these, please let us know so that we can update our system.

- Female, Woman
- Gender Fluid (non-fixed gender identity • that may change overtime)
- Male, Man ullet

•

- Non-Binary (neither exclusively male nor female)
- Transgender Female, Trans Woman
- Transgender Male, Trans Man
  - Two Spirit (a person who has both a masculine and feminine spirit, traditionally used in Native American/Alaskan Native communities)
- Please specify if not listed above:
- I don't know •
- I choose not to respond at this time

### Gender

What is your gender? (Select one):



## Pronouns



## Introduction and Definitions for Pronouns

Thank you for taking the time to answer these questions. To make sure we are communicating  $\bullet$ with you respectfully, the following question will ask you to choose or write-in your pronouns. Pronouns are how you identify yourself apart from your name and how someone refers to you in conversation. We recognize that this is a personal question, and responses may change overtime. This is an optional question, and your care will NOT be affected in any way should you choose not to respond.



## Version 2 Optional: Pronouns

### Pronouns

We would like to be respectful. What pronouns do you use to identify yourself? (Select all that apply)

- He, him, his (for someone who might identify as a male)
- She, her, hers (for someone who might identify as a female)
- They, them, theirs (non-binary, for someone who do not identify as either male or female, can be used in singular form)
- Ze, hir, hirs (non-binary, often used by people who do not identify as either male nor female)
- Ze, zir, zirs (non-binary, often used by people who do not identify as either male nor female)
- Please specify if not listed above: \_\_\_\_\_
- Use my name
- I don't know
- I choose not to respond at this time

) ntify as either male or female, can

lentify as either male nor female) lentify as either male nor female)

## **Relationship Status**



## Introduction and Definitions for Relationship Status

Thank you for taking the time to answer these questions. To make sure we have the information we need to identify potential health insurance eligibility and are considering lifestyle factors that can impact your health, the following question will ask you to identify your relationship status. This can include legal agreements with another person (marriage or a registered partnership) or relationships that are not legally recognized (in a committed relationship or dating). We recognize that this is a personal question, and responses may change overtime. This is an optional question, and your care will NOT be affected in any way should you choose not to respond.



## Version 2 Optional: Relationship Status

### **Relationship Status**

What is your relationship status? (Select all that apply)

- Dating (in a non-committed relationship with one person or more than one person)
- Divorced
- In a committed relationship with one person but not married (monogamous relationship)
- In a committed relationship with more than one person (polyamorous relationship)  $\bullet$
- In a registered domestic partnership (a legal relationship between two people who live together and share a domestic life, but are not married or in a civil union and are not blood relatives)
- Married lacksquare
- Separated
- Single
- Widowed
- Please specify if not listed above: \_\_\_\_\_
- I don't know
- I choose not to respond at this time



## **Disability Status**



## Introduction and Definitions for Disability Status

Thank you for taking the time to complete these questions. The following question will ask if  $\bullet$ you have difficulty doing certain things or completing certain tasks because of a physical or mental health condition that greatly limits your daily activities. This question will help to inform how your care team and others care for you and communicate with you about your care. It will also ensure that you receive the care and services you want and need, now or in the future. We recognize that this is a personal question and there is an option to not respond. Your care will NOT be affected in any way should you choose not to respond.



## Version 2: Disability Status

### **Disability Status**

Because of a physical or mental health condition, do you currently have difficulty with any of the following? Check all that apply.

- Hearing
- Seeing (even when wearing glasses)
- Concentrating, remembering, or making decisions
- Walking or climbing stairs
- Dressing or bathing
- Cooking for oneself
- Feeding oneself
- Using the toilet
- Doing errands alone such as shopping or visiting a doctor's office  $\bullet$
- Communicating or being understood using your usual language •
- Understanding when someone speaks in your usual language
- Other difficulties when doing activities throughout your day (please describe):
- I choose not to respond at this time  $\bullet$

## **Military Experience**



## Introduction and Definitions for Military Experience

• Thank you for taking the time to complete these questions. The following questions will ask you about your experience, or an immediate family member's experience, serving in the armed forces of the United States. The armed forces of the United States include the Army, Navy, Marine Corps, Air Force, Coast Guard, and Space Force. There is also an optional question on your experience in the armed forces of another country other than the United States. This question is optional and will NOT affect your care should you choose not to answer. This information is being collected to identify potential eligibility for U.S. Veteran benefits and referrals, and to ensure you are receiving the treatment and services you need and want, now or in the future.



### Version 2: U.S. Veteran Status and Other Military Experience

#### **U.S. Veteran Status**

#### Have you ever served in the United States Armed Forces, military Reserves, or National Guard? Select one.

- Yes, I served in the United States Armed Forces, military Reserves, or National Guard
- No, I have never served in the United States Armed Forces, military Reserves, or National Guard
- I don't know
- I choose not to respond at this time

#### Optional: When did you serve? (Check an option for EACH period in which you served, even if just for part of the period.)

- September 2001 or later (Post 9/11)
- August 1990 through August 2001 (including the Persian Gulf War)
- June 1975 through July 1990
- August 1964 through May 1975 (including the Vietnam War)
- February 1955 through July 1964
- June 1950 through January 1955 (including the Korean War)
- January 1947 through May 1950
- December 1941 through December 1946 (including World War II)
- November 1941 or earlier

#### Optional: Where did you serve? \_\_\_\_\_

#### Optional: Did an immediate family member who you live or lived with ever serve in the United States Armed Forces, military Reserves, or National Guard? (i.e., parent, guardian, spouse, partner, child, sibling etc.) Select one.

- Yes, an immediate family member that I live or lived with served the United States Armed Forces, military Reserves, or National Guard
- No, no immediate family member that I live or lived with has never served in the United States Armed Forces, military Reserves, or National Guard
- I don't know
- I choose not to respond at this time

### Version 2: U.S. Veteran Status and Other Military Experience

#### **Optional: Other Military Experience**

#### Optional: Have you ever served in the armed forces of a country other than the United States? Select one.

- Yes, I served in the armed forces of another country
- No, I have never served in the armed forces of another country ullet
- I don't know ullet
- I choose not to respond at this time •

<b>Optional: When did y</b>	vou serve?	_
Optional: Where did you serve?		

Optional: Did an immediate family member who you live or lived with ever serve in the armed forces of a country other than the United States? (i.e., parent, guardian, spouse, partner, child, sibling etc.) Select one.

- Yes, an immediate family member that I live or lived with served in the armed forces of a country other than the United States •
- No, no immediate family member that I live or lived with has never served in the armed forces of a country other than the United ulletStates
- I don't know
- I choose not to respond at this time



# **Spiritual Beliefs**





## Introduction and Definitions for Spirituality

Thank you for taking the time to answer these questions. To make sure we are providing you ulletwith care that is appropriate and accommodating to your lifestyle and values, the following questions will ask you about any beliefs we should know about before we provide care. These beliefs can include religious, health, cultural or any others you feel are important to your care experience. There is also an optional question that will ask you to identify a specific religion, spirituality, or belief system you follow. These questions are meant to inform any services we provide you now or in the future. We recognize that these are personal questions and there is an option to not respond. Your care will NOT be affected in any way should you choose not to respond.



## Version 2 Optional: Other Care Considerations

#### Which of the following should we know about you before we provide care? Select all that apply.

- Health beliefs •
- Cultural preferences •
- **Religious beliefs** •
- Spiritual beliefs •
- Specific diet followed (e.g., Halal, Kosher, Pescatarian, Vegetarian, Vegan) •
- Caregiving status  $\bullet$
- Other (please write): •
- I choose not to respond at this time ●

https://prapare.org/



## Version 2 Optional: Religion and/or Spiritual Beliefs

#### **Spiritual Beliefs**

#### What is your current religion, spirituality, or belief system, if any?

- Ancestral, indigenous, or tribal beliefs (such as Animism, Obeah, Shamanism, Vodou, among others)
- Agnostic (not sure if there is a God)
- Atheist (do not believe in God)
- Baha'l
- Buddhism
- Christianity: Protestant (such as Anglican, Baptist, Calvinist/Reformed, Episcopalian, Lutheran, Methodist, Nondenominational, Pentecostal, Presbyterian, or Seventh-day Adventist).
- **Christianity: Catholic**
- Church of Scientology
- Hinduism
- Islam, Nation of Islam (Muslim)
- Jehovah's Witnesses
- Judaism (Jewish)
  - \* Orthodox Judaism
- Mormon (Church of Jesus Christ of Latterday Saints/LDS)
- Orthodox Christian (Coptic Christian, Greek Orthodox Church, Russian Orthodox Church, or other orthodox church)

- others)
- among others)
- Rastafarianism
- Sikh
- Taoism
- Unitarian Universalist
- Zoroastrianism
- Spiritual but not religious Please specify if not listed above: \_\_\_\_\_
- I do not know
- I choose not to respond at this time

- Pagan or nature-based beliefs (such as Wicca, Druidism, among
  - Philosophical beliefs (such as Confucianism, Epicureanism, Humanism,



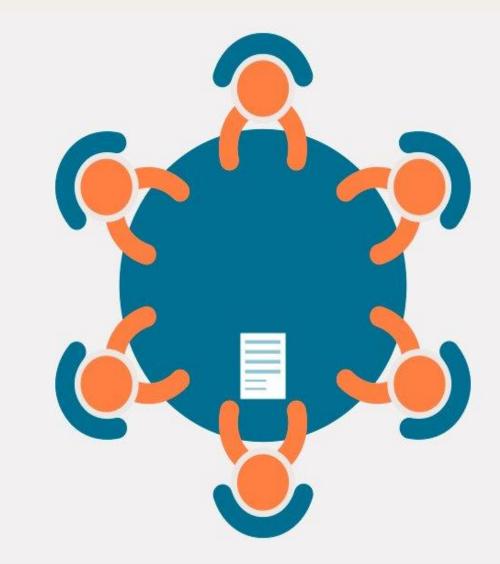
Adapted from 2014 Religious Landscape Survey: https://assets.pewresearch.org/wp-content/uploads/sites/11/2018/06/12094008/Appendix-D.pdf?ut source=content center&ut source2=how-to-ask-about-religion-in-your-surveys&ut source3=inline

## **Next Steps**



### Phase 2 Cognitive Testing

- Partnering with the Patient Advocate Foundation to test face validity
- Ensure individuals:
  - Understand the questions
  - What is being asked of them
  - Feel comfortable answering the questions
  - Believe response choices offered allow them to appropriately identify themselves
- Ensure staff administering questions:
  - Understand the questions
  - Feel comfortable asking the questions
- Complete by Fall 2024
- Potential minor revisions may result from this testing



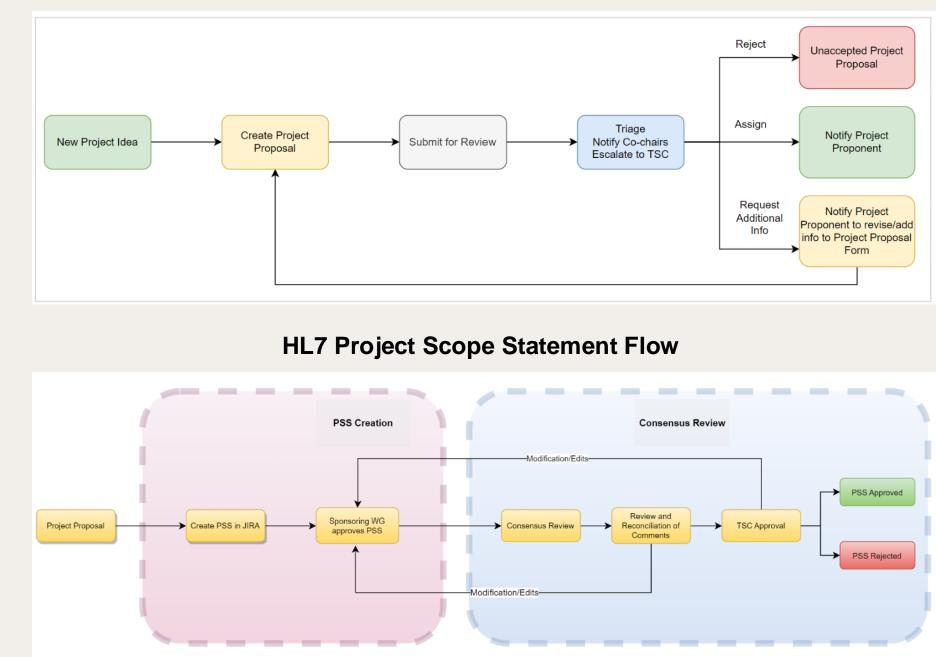
https://www.how-paid-research-works.com/what-are-paid-focus-groups



## Phase 3

### Building Consensus on Technical Standards

- Utilize HL7 standards development and  $\bullet$ consensus building process.
- Explore the development and publication of new FHIR Questionnaire representing the recommended data elements developed in Phase 1.
- Explore creation of corresponding HL7 Implementation Guides (IGs).



#### **HL7 Project Proposal Workflow**





## **Thank You!**

For more information, please visit: <u>www.civitasforhealth.org/demographic-data-</u> <u>standards</u>.

Questions? Or for information on how to join this effort, please feel free to reach out to mvalu@civitasforhealth.org.

Or, join us at the Civitas Annual Conference on October 15-17, 2024, in Detroit, MI. Learn more at <u>www.civitasforhealth.org</u>.

