HEI 2022 Scoring System and Methodology

The Healthcare Equality Index has four core objectives:

- Ensure foundational non-discrimination protection for patients, visitors and staff in via policy implementation and provide cultural competency training on LGBTQ-inclusion
- Demonstrate progress toward inclusion on LGBTQ patient care services and support
- Cultivate an inclusive workplace by providing LGBTQ-inclusive employee policies and benefits
- Demonstrate engagement with and public commitment to the LGBTQ community

<table>
<thead>
<tr>
<th>Criteria 1 – Non-Discrimination and Staff Training</th>
<th>40 Points Total</th>
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</thead>
<tbody>
<tr>
<td>This criteria encompasses foundational policy implementation and training completion requirements.</td>
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<tr>
<td>All questions in this section are scored and must be met in order to attain any tier of recognition</td>
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**Patient Non-Discrimination**

a. LGBTQ-inclusive Patient Non-Discrimination Policy
   - Policy must include the terms “sexual orientation” and “gender identity and expression” (or “gender identity”)
   - 5 points

b. Patient non-discrimination is communicated to patients and staff
   - Policy is shared in two ways with the public, typically online and in-print
   - Policy is shared with staff in at least one way
   - 5 points

**Equal Visitation**

a. Equal Visitation Policy
   - Policy must allow the patient’s visitor of their choice
   - 5 points

b. Equal Visitation Policy is communicated to patients and staff
   - Policy is shared in two ways with the public, typically online and in-print
   - Policy is shared with staff in at least one way
   - 5 points

**Employment Non-Discrimination**

a. LGBTQ-inclusive Employment Non-Discrimination Policy
   - Policy must include the terms “sexual orientation” and “gender identity or expression” (or “gender identity”)
   - 5 points

b. Employment Non-Discrimination Policy is shared with the public
   - Policy is shared with the public in at least one way
   - 5 points

**Staff Training**

a. Training in LGBTQ Patient-Centered Care
   - For new facilities or those that have not previously met the training requirement, key senior executives must complete the *LGBTQ Patient-Centered Care: An Executive Briefing* training provided by the HEI
   - Returning facilities that have previously met the Executive Briefing requirement must complete a minimum number of on-going staff training hours in LGBTQ-related topics
     - Facilities with up to 500 staff members must complete a minimum of 25 hours of on-going training
     - Facilities with 500 or more staff members must complete a minimum of 50 hours of on-going training
   - 5 points

b. HEI training options promoted to staff
   - Facilities must make the training options available through the HEI known to staff throughout their facility
   - 5 points
Criteria 2 – Patient Services and Support

Four subsections comprise this criteria: LGBTQ Patient Services and Support; Transgender Services and Support; Patient Self-Identification; and Medical Decision Making.

There are 26 scored questions in this section. In order to receive the full 30 points in this criteria, a facility must have at least 11 or more of these best practices in place from any of the subsections within this criteria. Facilities with 6 to 10 of these best practices in place will receive a partial score of 15 for this criterion.

**LGBTQ Patient Services & Support**
- Facility has a written strategy or plan for reducing health disparities specifically among LGBTQ patients and/or explicitly incorporates LGBTQ patients into a plan for reducing all patient disparities
- Facility has an internal planning or advisory committee focused on LGBTQ patient care issues
- Facility makes LGBTQ-knowledgeable and -friendly providers known as such to interested patients or provide a confidential mechanism to make LGBTQ-specific referrals
- Facility provides certain LGBTQ-specific clinical services
- Facility has an externally promoted LGBTQ-specific clinic
- Facility has an externally promoted LGBTQ-focused office, advocate or LGBTQ-specific patient navigator
- Facility’s website provides educational LGBTQ-related health information and/or links to LGBTQ health education or service resources from outside organizations
- Facility creates and distributes either an LGBTQ health education brochure or print materials about specific health topics affecting LGBTQ people (distinct from an LGBTQ services brochure for marketing purposes)

**Transgender Patient Services and Support**
- Facility has a written policy (or policies) that specifically outline procedures aimed at eliminating bias and insensitivity, and ensuring appropriate, welcoming interactions with transgender patients
- Facility offers certain transgender-specific clinical services
- Facility has an externally promoted multidisciplinary gender clinic for either adults and/or youth (distinct from a general LGBTQ clinic)
- Facility has a program or position to provide patient navigation/advocacy services specifically to transgender patients
- Facility provides all gender restrooms in public areas for patients and visitors and/or have clearly posted signage indicating a policy that allows individuals to use the restroom that aligns with their gender identity

**Patient Self-Identification**
- Electronic health record (EHR) system offers explicit options to capture patient’s current gender identity—when it differs from the patient’s sex assigned at birth.
- A two-question process is used to collect gender identity information (i.e. first asking current gender identity and subsequently asking sex assigned at birth)
- Staff Training is provided specifically about how to collect and record gender identity data in facility’s EHR system
- EHR system captures the patient’s pronouns in use AND prominently displays these pronouns in the banner or a pop-up easily accessible for front line staff and providers
- EHR system captures the patient’s name in use if it differs from their legal name AND prominently displays this name in the banner or a pop-up easily accessible for front line staff and providers
- EHR system offers an explicit way to capture a patient’s organ inventory
| EHR system offers explicit options for capturing a patient’s sexual orientation if they choose to provide it |
| Staff Training is provided specifically outlining LGBTQ status as confidential patient information in accordance with HIPAA protections |
| EHR system offers explicit options for recording a patient’s parents are inclusive of same-sex parents and other diverse families |
| EHR system offers explicit options for recording relationship status with an un-married partner |

**Medical Decision Making**

- Facility explicitly informs patients of their right to designate any person of their choice, including an unmarried partner, as medical decision-maker
- Staff training is provided specifically about medical decision making that includes LGBTQ-specific information
- Facility has a policy or official practices related to the treatment of intersex children that delays non-medically necessary procedures until the patient is old enough to make an informed decision *(new)*
### Criteria 3 – Employee Benefits and Policies

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<tr>
<th>Two survey subsections comprise this criterion: Equal Benefits and Additional Support for LGBTQ Employees.</th>
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This criterion is divided into two scored calculations. The first calculation consists of 13 scored questions and, like Criteria Two and Four, a facility may either receive full or partial credit depending upon the number of initiatives a facility has in place. The second calculation is dependent upon the provision of transgender healthcare benefits for employees at the facility. This practice, alone, is worth 5 points.

<table>
<thead>
<tr>
<th>There are 13 scored questions in this section. In order to receive full 15 points in this calculation, a facility must have at least 6 or more of these best practices in place. Facilities with 3 to 5 of these best practices in place will receive a partial score of 10 points.</th>
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#### Equal benefits

- The health insurance policy’s definition of spouse includes same-sex spouses AND the same documentation is required for enrollment of same and different-sex spouses
- Healthcare benefits are provided to domestic partners
- FMLA-equivalent benefit allows employees to take family and medical leave to care for domestic partners as well as the children of a domestic partner, regardless of biological or adoptive status
- Bereavement leave benefit includes the event of the death of a domestic partner or the partner’s immediate family

#### Additional support for LGBTQ employees

- Facility adopts written gender transition guidelines documenting supportive policies and practices on issues pertinent to a workplace gender transition
- Facility officially recognizes an LGBTQ employee resource group
- Facility’s diversity & inclusion office, diversity council or working group focused on employee diversity specifically includes LGBTQ diversity as part of its mission
- Anonymous employee engagement or climate surveys allow employees the option to identify as LGBTQ
- Anonymous employee engagement or climate surveys include question(s) related to LGBTQ concerns
- Confidential human resources information system (HRIS) captures sexual orientation and/or gender identity (if voluntarily disclosed) along with other demographic information such as race and gender
- Facility commemorates an LGBTQ Awareness Day for employees at the facility
- Facility has explicitly LGBTQ-inclusive hiring efforts
- Facility has openly LGBTQ people serving in high-level visible leadership positions

**This practice is scored independently, is worth 5 points and must be met in order to attain Leader status.**

#### Healthcare benefits impacting transgender employees

- Facility provides at least one health plan to all employees that affirmatively and explicitly covers medically necessary health services for transgender people, including gender transition-related treatment

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<th>20 Points Total</th>
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| 6 or more initiatives = 15 points |
| 3-5 initiatives = 10 points |
| 5 points |
### Criteria 4 – Patient and Community Engagement

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<th><strong>10 Points Total</strong></th>
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This criteria focuses on community outreach and promotion to let the LGBTQ community around your facility know you are a welcoming and affirming facility, working toward LGBTQ inclusion.

**There are 9 scored questions in this section. In order to receive the full 10 points, your facility must have at least 4 of these best practices in place. Facilities with 2 or 3 of these best practices in place will receive a partial score of 5 for this criterion.**

#### LGBTQ Community Engagement and Marketing
- Facility supports one or more LGBTQ related events or initiatives in the facility’s service area
- Facility engages in LGBTQ-inclusive marketing or advertising to the LGBTQ community
- Facility created/uses an LGBTQ-specific logo
- Facility has publicly supported LGBTQ equality under the law through local, state, or federal legislation or regulations

#### Understanding the needs of LGBTQ patients and community
- Patient satisfaction surveys allow patients the option to identify as LGBTQ
- Patient satisfaction survey include LGBTQ-related questions
- Facility works with external LGBTQ organizations or community members to assess and address LGBTQ health needs or concerns
- Facility includes external LGBTQ community member(s) on a governing or community advisory board
- Facility supports LGBTQ health-related research

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<th><strong>4 or more initiatives = 10 points</strong></th>
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<th><strong>2-3 initiatives = 5 points</strong></th>
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<thead>
<tr>
<th>HEI 2022 Maximum Score/LGBTQ Healthcare Equality Leader</th>
<th>100</th>
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<tbody>
<tr>
<td>HEI 2022 LGBTQ Healthcare Equality Top Performer</td>
<td>80-95*</td>
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<tr>
<td>HEI 2022 LGBTQ Healthcare Equality Foundational Policies Designation</td>
<td>40*</td>
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*See subsequent pages for requirements to earn Leader, Top Performer and Foundational Policies tier recognition. In addition to the minimum overall score, each has requirements related to obtaining full or partial credit in each criteria section.
## Criteria 5 – Responsible Citizenship

This section—rarely implemented—focuses on known activity that would undermine LGBTQ equality or patient care.

Healthcare facilities will have 25 points deducted from their score for a large-scale official or public anti-LGBTQ blemish on their recent records. Scores on this criterion are based on information that has come to HRC Foundation’s attention related to topics including but not limited to:

- revoking inclusive LGBTQ policies or practices;
- facilitating the continued practice of healthcare providers that provide or promote LGBTQ-related treatment or services to that have been discredited by mainstream medical and mental health organizations, including, but not limited to, “conversion therapy”;
- engaging in proven practices that are contrary to the facility's written LGBTQ patient or employment policies;
- advocating for public policies or regulations that would be detrimental to LGBTQ equality and/or health;
- or directing charitable contributions or other public support to organizations whose primary mission includes advocacy against LGBTQ equality or care.

The point deduction may be reflected in a current or future score, depending on the situation. If applied to a current score, HEI LGBTQ Healthcare Equality Leader or Top Performer status will be suspended or revoked as necessary. If at any time after losing points on this criterion a healthcare facility changes course and satisfies the HRC Foundation’s noted concerns, the HRC Foundation will re-evaluate this criterion’s score for that facility.

Please see our [website](#) for more information about this criteria.
Healthcare Equality Index

Tiers of Recognition

The Healthcare Equality Index (HEI), a project of the Human Rights Campaign Foundation, promotes LGBTQ inclusive policies and affirming practices in healthcare facilities and formally recognizes those facilities that lead the field in LGBTQ inclusion. HRC recognizes there are many steps on the journey toward full LGBTQ inclusion and the HEI provides tools and resources to help healthcare facilities implement policies and affirming practices. Participating healthcare facilities are formally recognized in one of three Tiers of Recognition on this journey. This recognition enhances a healthcare facility's efforts to establish a track record of LGBTQ inclusion and aids in building and maintaining meaningful relationships with LGBTQ communities in their area.

The three Tiers of Recognition are:

1. **Foundational Policies for LGBTQ Healthcare Equality**: At this level, healthcare facilities are early in their inclusion journey and have demonstrated that they have key foundational policies in place for LGBTQ inclusion. These policies focus on Patient Non-Discrimination, Equal Visitation and Employee Non-Discrimination—where each must be codified and communicated publicly. Healthcare facilities must also provide some training in LGBTQ culturally competent care*. To achieve this tier of recognition, a healthcare facility must receive full credit for all of the questions in Criteria 1 - Non-Discrimination and Staff Training.

2. **LGBTQ Healthcare Equality Top Performer**: At this level, in addition to meeting the Foundational Tier of Recognition, Top Performer healthcare facilities have demonstrated that they have adopted a minimum number of LGBTQ inclusive policies and practices in the areas of LGBTQ Patient Services and Support, Employee Benefits and Policies and Patient and Community Engagement. To achieve this tier of recognition, a healthcare facility must receive full credit in Criteria 1 and at least partial credit in Criteria 2, 3 and 4 and obtain an overall score of between 80-95.

3. **LGBTQ Healthcare Equality Leader**: At this level, Leader healthcare facilities demonstrate true leadership in adopting LGBTQ policies and practices. To achieve this tier of recognition, a healthcare facility must receive full credit in Criteria 1, 2, 3 and 4 and meet the criteria for provision of transgender inclusive health insurance—obtaining a top score of 100.

*Training options (that include CME/CEU credits) are available to facilities that complete the survey.
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<tbody>
<tr>
<td>Seal of Recognition</td>
<td>N/A</td>
<td><a href="#">HEALTHCARE EQUALITY INDEX</a> TOP PERFORMER</td>
<td><a href="#">HEALTHCARE EQUALITY INDEX</a> LEADER</td>
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<tr>
<td>Criteria Requirements</td>
<td>Criteria 1 - Non-Discrimination and Staff Training</td>
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<td>Criteria 3 – Employee Benefits and Policies (subsection 1)</td>
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<td>Criteria 3 – Transgender Inclusive Healthcare Benefits (subsection 2)</td>
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<td>Criteria 4 – Patient and Community Engagement</td>
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<td>Partial Credit</td>
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<tr>
<td>Minimum Score</td>
<td>Must receive all 40 points available from Criteria 1</td>
<td>80-95</td>
<td>100</td>
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