How to Complete the HEI 2024

Tari Hanneman
Director, Health and Aging Program
She, Her, Hers
Housekeeping

- All lines are muted
- You can submit questions via Control Panel – PLEASE USE THE Q&A function rather than chat for questions
- Use Zoom’s “Audio Setting” to access audio via your Telephone or your computer’s Speakers.
- We will share the slides and the recording after the presentation
- This is a recorded webinar
### HEI 2024 Criteria Scoring Overview

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<th>Criteria 1</th>
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<td><strong>Non-Discrimination &amp; Staff Training</strong></td>
<td><strong>Patient Services &amp; Support</strong></td>
<td><strong>Employee Benefits &amp; Policies</strong></td>
<td><strong>Patient &amp; Community Engagement</strong></td>
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</table>
| • Foundational Non-Discrimination Policies  
  • Patient, Visitation, Employment  
  • Must have inclusive policy & communicate the policy  
  • LGBTQ+ Training  
  ✓ 5 points for each policy & meeting the training requirement  
  ✓ 5 points for communication of the policies and training | • Four subsections/Two scoring sections:  
  • LGBTQ+ Patient Services & Support  
  • Transgender Patient Services & Support  
  • Medical Decision Making  
   ✓ 18 scored questions  
   ✓ 9+ = full credit = 20 pts  
   ✓ 5-8 = partial credit = 10 pts  
  • Patient Self Identification and Data Collection  
   ✓ 10 scored questions  
   ✓ 6+ = full credit = 10 pts  
   ✓ 3-5 = partial credit = 5 pts | • Two subsections:  
  • Employee Policies & Benefits  
  • Additional Support for LGBTQ+ Employees  
  ✓ 15 scored questions  
  ✓ 7+ = full credit = 15 pts  
  ✓ 4-6 = partial credit = 10 pts  
  ✓ Transgender Inclusive Healthcare Benefits is scored separately = 5 pts | • One section  
   ✓ 12 scored questions  
   ✓ 6+ = full credit = 10 pts  
   ✓ 3-5 = partial credit = 5 pts |

**40 points total**  
**30 points total**  
**20 points total**  
**10 points total**
Your Custom HEI Homepage

Communications & Resources:
Deadline for submission: September 29, 2023

Announcements:
Helpful Resources:
- Resource Guide
- Scoring Criteria
- HEI 2024 Requirements Grid

Please use Chrome or Firefox browsers while completing the HEI 2024. There are known compatibility issues with Internet Explorer/Microsoft Edge and we recommend you avoid using those browsers if possible.

General information and resources

Log in here
All contributors for your healthcare facility use the same Username and Password

Login to continue to the HEI 2024 Survey

Forgot Credentials?

Please reach out to us at HEI@HRC.ORG if you need assistance with the HEI 2024.

Log in here

Training Information & Resources:
Training Requirement: Executive Briefing Required

Training Hours Completed: We have not received this form to account for your training completion:
https://forms.office.com/forms/hei-executive-briefing-participants/
Facility ID: [redacted]
Security Keyword: HRC

Training Hours Last Updated: 07/04/2023

Helpful Training Resources:
- Training Credit Request Form
- Submitting your internal LGBTQ Training for HEI Consideration
- Resources to Meet the Training Promotion Requirement

Training information and resources including your specific training requirement and status
For a healthcare facility to meet the Executive Briefing Training Requirement, at least one senior manager in each of the following work areas must complete the online, three-part training series entitled “LGBTQ Patient-Centered Care: An Executive Briefing” by the HEI survey deadline:

- Organization leadership (e.g., CEO, COO, medical director, vice president, counsel, or similar “C-suite” leader)
- Nursing management
- Patient relations/services management
- Admitting/registration management
- Human resources management

The senior managers that attend this training must be the highest ranking staff member from each of these work areas for the specific facility. Senior managers are typically at the level of Director or higher.

Executive Briefing Series:
3 online modules
Total of 2.45 Hours

Training Information & Resources:

- Training Requirement: Executive Briefing Required
- Training Hours Completed: We have not received this form to account for your training completion: https://hrc.wufoo.com/forms/hei-executive-briefing-participants/
- Facility ID: [Redacted]
- Security Keyword: HRC
- Training Hours Last Updated: 07/04/2023

Helpful Training Resources:
- Training Credit Request Form
- Submitting your Internal LGBTQ Training for HEI Consideration
- Resources to Meet the Training Promotion Requirement
Welcome

Welcome to the Healthcare Equality Index (HEI)--we’re looking forward to working with you!

Before you get started, please take a moment to review our HEI 2024 Scoring Criteria. We also encourage you to review the HEI Resource Guide, our comprehensive instructional and reference accompaniment to the Healthcare Equality Index (HEI) Survey. You may also find it helpful to download this resource which outlines each scored question, the documentation that is required to be submitted for validation and whether or not a system-level response/materials will be accepted. We hope that you find this useful to help you gather the materials that are necessary to complete the HEI survey.

Our Confidentiality Commitment to You

As part of the Healthcare Equality Index (HEI) survey we collect a variety of information from healthcare facilities, some of which may be considered confidential in nature. The Human Rights Campaign Foundation limits access to such information to its employees or consultants who are subject to confidentiality obligations. We will not disclose Confidential Information to third parties, unless prior authorization is received from. “Confidential Information” means non-public information submitted by to the Human Rights Campaign Foundation as part of the Healthcare Equality Index, including, for example, patient policies and practices, diversity and cultural competency training, employee policies and benefits, marketing information, business policies and procedures, internal committee structures and membership and other documents submitted or made available to Human Rights Campaign Foundation in response to the HEI Survey.
Navigating the HEI

- Browser Compatibility
- Visual Cues
- Table of Contents
- Multiple Users
- Saving & Returning
- File Types
- Websites
- Help Guides

Important Information for Navigating the Survey

Here is some important information to help you find your way around our survey platform and have the best experience.
Navigating the HEI – Key Visual Cues

**SCORED Q REQUIRED**
This image indicates that the question is a scored question that is required to achieve a score of 100 and be an LGBTQ+ Healthcare Equality Leader.

**SCORED Q OPTIONAL**
This image indicates that the question is a scored question that is among several in that criteria section that counts towards either full or partial credit for the section.

**REQUIRED FOR VALIDATION**
This image indicates that you must provide some additional information or upload a document to validate a scored question.

An asterisk indicates a required, non-scored question.
A plus sign indicates a question that leads to a scored question.

All questions that contain one of the images above must be answered (or the requested materials must be uploaded) before you will be able to submit the survey.
Complete this section of the survey as soon as possible
• It lets us know that you are working on the survey AND
• It helps us communicate with the correct people at your healthcare facility

We strongly encourage a minimum of two contributors
• While multiple people can work on the survey, try to avoid working on it at the same time
NAVIGATING THE HEI: returning to the survey

Welcome back to the Healthcare Equality Index!

You will be entering the HEI survey where you or one of your fellow survey contributors last left off. Please use the Table of Contents to move to any section of the survey that you would like to work on.

If you have not previously signed into the survey, we ask that you first use the Table of Contents to go to the Welcome page to review important survey information and then proceed to the Survey Contributors page and enter your contact information.
Use the Table of Contents to move between sections of the survey.

You can collapse the Table of Contents using the menu button.

You can open the Table of Contents by either using the menu button or the Table of Contents button below the questions.
Navigating the HEI: Answering Questions

Employment Non-Discrimination Policy

Q1. Does your employment non-discrimination policy include the term “sexual orientation” AND the term "gender identity or expression" (or "gender identity")?

- [ ] Our policy includes BOTH the term “sexual orientation” AND the term "gender identity or expression" (or "gender identity")
- [ ] Our policy ONLY includes the term "sexual orientation"
- [ ] Our policy ONLY includes the term "gender identity or expression" (or "gender identity")
- [ ] Our policy DOES NOT include either the term "sexual orientation" or the term "gender identity or expression" (or "gender identity")

If you answer a question affirmatively, then an additional question(s) will be displayed asking you to submit your validating information.

Q1a. To receive credit, please attach a copy of your employment non-discrimination policy.

[Drop files or click here to upload]
There is an HEI Resource Guide Entry for every scored question in the survey.

Q2. Since January 1, 2022, has your organization engaged in marketing or advertising to the LGBTQ+ community (other than sponsorship or promotional materials for LGBTQ+ related events)?

View the HEI Resource Guide to see examples and resources for this question.

- Yes
- No, but interested
- No
You must close each section of the survey by marking it as final. In order to mark it as final and close the section of the survey, all required questions must be answered, and all validating information must be submitted.

All sections of the survey must be marked as final and closed before you can submit the survey.
You can access the preliminary score via the Table of Contents.

Scores are calculated for each criteria section, and they will only calculate accurately once you have completed that criteria section (including all subsections) of the survey. All sections must be completed before a designation will be available.

The preliminary score is a reflection your responses only and does not necessarily reflect what you will ultimately get credit for once we review your survey and validating materials.
Submitting your Survey

Subsection 2 Requires the provision of transgender-inclusive healthcare benefits and is worth 5 points.

Subsection 2 - Preliminary Score: 0

Preliminary Total Criteria: 0

Criteria 4 – Patient and Community Engagement
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 that have 2 or 3 of these best practices in place will receive a partial score of 5 for this criterion.

Criteria 4 Count: 0

Preliminary Total Criteria: 0

Total Preliminary HEI Score: 10
Preliminary Tier: No Tier Designation
Click here for an explanation of the HEI 2022 Tier Designations

Note: If the total preliminary score is not calculating correctly, please click on the previous page button and then click save and continue to return to this page to refresh the score.
If a specific section does not appear to be calculating correctly, please go back to the beginning of that section and click through the entire section.

Please keep in mind that this is a preliminary score only and it is solely based on your responses to this survey. Your HEI score will not be considered final until the HEI Team has reviewed and confirmed your responses. You will be notified of your score after our review and have an opportunity to address any items that were not counted for credit.
Review your list of contributors to make sure everyone that worked on the survey has been entered.

You will then be asked to select the HEI Primary Contacts as well as the Official Submitter.

The HEI Official Submitter is the person at your organization who is authorized to review and submit the HEI 2024 survey on behalf of your organization. The Official Submitter must be an employee of the organization who is vested with the authority to submit responses and supporting documentation on behalf of the organization.
Remember: All sections of the survey must be finalized and closed to be considered complete.

This table will show you the status of each section.

If the box next to the section name is either blank or says “DRAFT – This section is not complete” then you need to go back to that section and close it.

If the section says “FINAL – This section is complete” then you are good to go for that section.
Submitting your Survey: Sign & Submit

Once all the sections of the survey have been finalized and closed, you will see this message and you may submit your survey.

The official submitter needs to review the affirmation statement and then provide an electronic signature and submit the survey.

Survey Affirmation and Submission

I, Marcos Garcia, attest that I have full power and authority to submit responses and supporting documentation on behalf of for participation in the Healthcare Equality Index survey administered by the Human Rights Campaign Foundation. I attest that all of the responses submitted to this survey are true, complete and accurate to the best of my knowledge.

I understand that the Human Rights Campaign Foundation will review and validate the information submitted and that the preliminary score displayed in this survey may change based on this validation. I also understand that the Human Rights Campaign Foundation will send us a preliminary score after our responses have been validated and that we will have an opportunity to respond to any noted deficiencies – with an expected response window of two weeks.

Finally, I attest that I am familiar with the Healthcare Equality Index 2020 Report and online search tool and the level of information published on each participating healthcare facility rated as part of that report. I also understand that the Human Rights Campaign Foundation will release the same level of information about it in the Healthcare Equality Index 2022 and subsequent reports based on the information submitted in this year’s survey.
Post Submission Process

- After you submit your HEI survey, the HEI Team will review it to ensure that everything you submitted meets the HEI criteria.

- Surveys will be reviewed in approximate order of submission.

- After our review we will send you a preliminary score and designation that includes notes about any items that did not meet our criteria and/or requests for additional information to help us determine if something meets our criteria.

- You will have approximately 2 weeks to respond to our email and submit any updated validating information.

- After you reply we will assess that information and add it to your survey if it meets the HEI criteria and then send you a final score and designation.
# HEI 2024 Criteria Scoring Overview

## Criteria 1

**Non-Discrimination & Staff Training**

- Foundational Non-Discrimination Policies
- Patient, Visitation, Employment
- Must have inclusive policy & communicate the policy
- LGBTQ+ Training

- 5 points for each policy & meeting the training requirement
- 5 points for communication of the policies and training

**40 points total**

## Criteria 2

**Patient Services & Support**

- Four subsections/Two scoring sections:
  - LGBTQ+ Patient Services & Support
  - Transgender Patient Services & Support
  - Medical Decision Making
    - 18 scored questions
    - 9+ = full credit = 20 pts
    - 5-8 = partial credit = 10 pts
  - Patient Self Identification and Data Collection
    - 10 scored questions
    - 6+ = full credit = 10 pts
    - 3-5 = partial credit = 5 pts

**30 points total**

## Criteria 3

**Employee Benefits & Policies**

- Two subsections:
  - Employee Policies & Benefits
  - Additional Support for LGBTQ+ Employees
    - 15 scored questions
    - 7+ = full credit = 15 pts
    - 4-6 = partial credit = 10 pts
    - Transgender Inclusive Healthcare Benefits is scored separately = 5 pts

**20 points total**

## Criteria 4

**Patient & Community Engagement**

- One section
  - 12 scored questions
  - 6+ = full credit = 10 pts
  - 3-5 = partial credit = 5 pts

**10 points total**
TIERS OF RECOGNITION

2024 LGBTQ+ HEALTHCARE EQUALITY

• Full credit in Criteria 1

2024 LGBTQ+ HEALTHCARE EQUALITY

• Full credit in Criteria 1
• At least partial credit in Criteria 2, 3, 4
• Score of 80 to 95

2024 LGBTQ+ HEALTHCARE EQUALITY

• Full credit in each criteria section
• Transgender inclusive healthcare benefits for employees
• Top score of 100

HUMAN RIGHTS CAMPAIGN FUNDATION
<table>
<thead>
<tr>
<th>Facility Name</th>
<th>Wake Forest Baptist Medical Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standing</td>
<td>TOP PERFORMER</td>
</tr>
<tr>
<td>Health System Name</td>
<td>Atrium Health</td>
</tr>
<tr>
<td>Address</td>
<td>1 Medical Center Blvd, Winston Salem, NC, 27157</td>
</tr>
<tr>
<td>Website</td>
<td><a href="http://www.wakehealth.edu">www.wakehealth.edu</a></td>
</tr>
</tbody>
</table>

**HEALTHCARE FACILITIES SEARCH**

**El Rio Community Health Center**

**Address**
820 W. Congress Street
Yuma, AZ 85365-2401

**Contact**
862-670-3000
Visit Website

**HEALTHCARE EQUALITY INDEX**

**LEADER**

**DETAILED RATINGS**

**Non-Discrimination & Staff Training**

40/40

The Non-Discrimination and Staff Training criteria represents the foundational policies and practices in providing LGBTQ+ inclusive patient-centered care. These questions assess whether a facility has LGBTQ+ inclusive policies and whether the facility shares these policies with the public and its patients and staff. In order to most effectively implement these policies, we also require training for staff in LGBTQ+ inclusive care. All questions in this section are scored and must be met in order to receive full credit, up to 40 points.

**SUB-CRITERIA**

**Patient Non-Discrimination**

- Patient Non-Discrimination Policy is LGBTQ+ inclusive
- Patient Non-Discrimination Policy is communicated

**Visitation Non-Discrimination**

- Visitation Policy is LGBTQ+ inclusive
- Visitation Policy is communicated

**Employment Non-Discrimination**

- Employment Policy is LGBTQ+ inclusive
- Employment Policy is communicated

**Total Score**
95/100

**HEI SCORE BREAKDOWN**

Patient Non-Discrimination Score
10/10
HEI 2024 Timeline

- Deadline for submission of new individual surveys – September 29, 2023
- Training completion deadline – October 31, 2023
- Survey validation period – September – December 2023
- All surveys finalized – final scores and designations completed – end of January 2024
- HEI 2024 Report released – early May 2024
Questions
Thank You!