HEI 2018 Rating System and Methodology

In 2015, the Healthcare Equality Index announced a change in its scoring mechanism. After nine years of promoting LGBTQ-inclusive care, the HEI showed great success in getting hospitals and other healthcare facilities across the nation to adopt the LGBTQ-inclusive policies included in the "Core Four" Leader Criteria. While having the policies from the Core Four in place are foundational, for healthcare facilities to provide truly inclusive LGBTQ patient-centered care, they must also adopt many of the policies and practices found in the Additional Best Practices section of the HEI survey.

Four new core objectives went into effect with the HEI 2017:

- **Ensure foundational protection** for patients, visitors and staff in patient and staff policies and provide cultural competency training on LGBTQ-inclusion
- Demonstrate progress toward **inclusion on LGBTQ patient care** and support
- Cultivate an inclusive workforce by providing **LGBTQ-inclusive employee** support and benefits
- Demonstrate **public commitment** to the LGBTQ community

Criteria 1 – Non-Discrimination and Staff Training	40 Points Total
This criteria encompasses what was previously considered the Core Four Leader Criteria. **All questions in this section are scored and must be met in order to attain Leader status.**	

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")
  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
	
	5 points

Equal Visitation
  a. Equal Visitation Policy
      • Policy must allow the patient's visitor of their choice
  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
	
	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")
  b. Employment Non-Discrimination Policy is shared with the public
      • Policy is shared with the public in at least one way.
	5 points
	
	5 points

Staff Training
  a. Training in LGBTQ Patient-Centered Care
      • For first year facilities, key senior executives must complete the *LGBTQ Patient-Centered Care: An Executive Briefing* training provided by the HEI. **OR**
      • Returning facilities must complete at least 25 hours of staff training in LGBTQ-related topics, either clinical or broader training
  b. HEI training options promoted to staff
      • Facilities must make training options available through the HEI known to staff throughout their facility.
	5 points
	
	5 points

	30 Points Total
Criteria 2 –Patient Services and Support	
Four subsections compose this criteria: LGBTQ Patient Services and Support; Transgender Services and Support; Patient Self-Identification; and Medical Decision Making. **There are 22 scored questions in this section. In order to receive the full 30 points, your facility must have at least 11 or more of these best practices in place from any of the subsections. Facilities that have 6 to 10 of these best practices in place will receive a partial score of 15 for this criterion.** **LGBTQ Patient Services & Support** - Have a written strategy or plan for reducing health disparities among LGBTQ patients and/or incorporate LGBTQ patients into your plan for reducing all patient disparities. - Have an internal planning or advisory committee focused on LGBTQ patient care issues **(new)** - Publicly make LGBTQ-knowledgeable and -friendly providers or facilities known as such to interested patients or provide a confidential mechanism to make LGBTQ-specific referrals **(revised)** - Provide some LGBTQ-specific clinical services - Review clinical services to identify LGBTQ-related gaps - Have an external LGBTQ-focused office or ombudsman **(revised)** - Provide LGBTQ-related health information on the facility's website - Create a brochure or other print material to support LGBTQ patients - Make external LGBTQ health resources available to patients **Transgender Patient Services and Support** - Have a written policy (or policies) that specifically outline procedures and practices aimed at eliminating bias and insensitivity, and ensuring appropriate, welcoming interactions with transgender patients. - Offer some transgender specific clinical services. - Have a specific program or position to provide patient navigation/advocacy services to transgender patients **(revised)** - Offer gender neutral restrooms in public areas for patients and visitors **Patient Self-Identification** - Electronic health records offer explicit options to capture patient's current gender identity if it differs from the sex they were assigned at birth. - Two-question process is used to collect gender identity information (i.e. first asking current gender identity and then asking sex assigned at birth) - Training is provided to staff on how to collect and record gender identity data **(new)** - Electronic health records offer explicit options for capturing patient's sexual orientation if they choose to volunteer that information. - Employees are provided training explicitly reminding them that LGBTQ status is confidential patient information. - Electronic health records offer explicit options for recording parents that are inclusive of same-sex parents and other diverse families. - Electronic health records offer explicit options for recording relationship status with an un-married partner. **Medical Decision Making** - Organization explicitly informs patients of their right to designate a person of their choice, including a domestic partner, as medical decision-maker - Organization offers employee training related to medical decision making that includes LGBTQ specific information	11 or more initiatives = 30 points 6-10 initiatives = 15 points

	20 Points Total
Criteria 3 – Employee Benefits and Policies	
This criteria focuses on the employee as much as the patient in providing inclusive care. These questions don't only cover health insurance benefits, but also address employee resources groups, LGBTQ-inclusive hiring efforts, transgender inclusive healthcare benefits, employee transition support, and much more. **There are 15 scored questions in this section. In order to receive the full 20 points, your facility must have at least 7 or more of these best practices in place. Facilities that have 4 to 6 of these best practices in place will receive a partial score of 10 for this criterion.** Equal benefits • Health insurance policy's definition of spouse includes same sex spouses. • Same documentation is required for enrollment of same and opposite sex spouses. • Healthcare benefits are provided to domestic partners. • COBRA-equivalent benefits are provided to domestic partners • FMLA-equivalent benefits allow 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 allowed in the event of the death of a domestic partner or their immediate family Benefits and policies impacting transgender employees • Provide at least one health plan to all employees that explicitly covers medically necessary health services for transgender people, including gender transition-related treatment • Organization has written gender transition guidelines documenting supportive policies and practices on issues pertinent to a workplace gender transition Additional support for LGBTQ employees • Organization has an officially recognized LGBTQ employee resource group • Organization has a diversity & inclusion office, diversity council or working group focused on employee diversity that specifically includes LGBTQ diversity as part of its mission **(new)** • 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 • Commemorate an "LGBTQ Holiday" at the facility • Have explicitly LGBTQ-inclusive hiring efforts • Organization has openly LGBTQ people serving in high level visible leadership positions **(new)**	7 or more initiatives = 20 points 4-6 initiatives = 10 points

Criteria 4 – Patient and Community Engagement	10 Points Total
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 the following best practices in place. Facilities that have 2 or 3 of the following best practices in place will receive a partial score of 5 for this criterion.** LGBTQ Community Engagement and Marketing • Support one or more LGBTQ related events or initiatives in the facility's service area • Engage in LGBTQ-inclusive marketing or advertising to the LGBTQ community • Have an LGBTQ-specific logo **(new)** • Organization has publicly supported LGBTQ equality under the law through local, state, or federal legislation or initiatives **(new)** Understand the needs of LGBTQ patients and community • Patient surveys allow patients the option to identify as LGBTQ • Patient surveys include LGBTQ related questions • Organization works with LGBTQ organizations or community members to assess LGBTQ needs or address LGBTQ-related concerns **(revised)** • Include external LGBTQ representation on a governing or community advisory board • Support LGBTQ health-related research	4 or more initiatives = 10 points 2-3 initiatives = 5 points

HEI 2017 Perfect Score/Leader in LGBTQ Healthcare Equality	100

Criteria 5 – Responsible Citizenship	-25 Points
This section 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 Leader in LGBTQ Healthcare Equality status may 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, HRC Foundation will re-evaluate the criterion for that facility. Please see our [website](#) for more information about this criteria	-25 points