

HIX R27 Update

RELD SOGI Training

Collecting RELD and SOGI Data (Race, Ethnicity, Language, Disability, Sexual Orientation, and Gender Identity)



Meeting Objectives

- Describe why **MassHealth** and the **Health Connector** are collecting information **on race, ethnicity, language, sex, sexual orientation, and gender identity**
- Explain **basic concepts** and **definitions** of **race, ethnicity, and language** as well as **sex, sexual orientation, and gender identity**
- Introduce the new updates to how **MassHealth** and the **Health Connector** are **collecting demographic information**

Agenda



1

MassHealth and the Health Connector's Mission and Focus on Health Equity

2

Why Collect Race, Ethnicity, Sex, Sexual Orientation, and Gender Identity Information?

3

Define Key Terms

4

Explore Scenarios Related to Data Collection

MassHealth and the Health Connector's Mission and Focus on Health Equity



MassHealth's Mission

MassHealth's mission¹ is to **improve the health outcomes** of our diverse members and their families by providing access to integrated health care services that promote sustainable and **equitable** health, well-being, independence, and quality of life.

1. <https://www.mass.gov/doc/masshealth-2022-comprehensive-quality-strategy-2/download>



The Health Connector's Mission

The Health Connector is the state's health insurance Marketplace, offering MA residents - individuals, families, and small employers access to affordable health insurance coverage. Our commitment to providing equitable access to care aligns and builds upon the goals that MassHealth has set forth. By increasing and improving the data collected, the Health Connector can increase our capacity to identify and manage disparities in our plan offerings and overall operations.

Although the Health Connector is not part of the same contracting approach that MassHealth has identified as part of its 1115 waiver, the Health Connector intends to use this collected data to identify and manage disparities in applications for health coverage, health plan enrollment, and loss of coverage.

MassHealth will also transmit data to health plans where possible, so that the participating health plans can best meet the needs of their membership.

1. <https://www.mass.gov/doc/masshealth-2022-comprehensive-quality-strategy-2/download>

MassHealth, the Health Connector, and Health Equity Definition



The opportunity for everyone to attain their full health potential, regardless of their social position (e.g., socioeconomic status), socially assigned circumstance (e.g., race, gender identity/gender expression, ethnicity, disability status, religion, sexual orientation, geography, disability, language etc.)¹

- [State Health & Values Strategies](#)



Health Equity – A Core Pillar of MassHealth’s Value-Based Care

MassHealth has made **Health Equity a core pillar** of value-based care in its 1115 waiver demonstration renewal (2022-2027). ACOs and acute hospitals will be incentivized to make progress towards health equity **in three domains:**

1. Demographic and Health-Related Social Needs Data

Attaining complete, beneficiary-reported demographic (race, ethnicity, language, disability, sexual orientation, gender identity) and health-related social needs data

2. Equitable Access and Quality

Identifying disparities, analyzing root causes, and intervening on identified disparities to reduce disparities in access and quality outcomes

3. Capacity and Collaboration

Establishing organizational capacity for health equity and collaborating with health system and community partners



Ambitious performance targets will push the health care system to make **tangible progress within 5 years while testing approaches to advance health equity interventions** that can be evaluated and replicated

A 2020 CMS commissioned study reported that MA is **missing 46.8% of MassHealth member race and ethnicity data**. To **address this gap**, MassHealth is targeting at least 80% completeness for race and ethnicity data collection by the end of 2025 and at least 80% completeness for language, disability, sexual orientation, and gender identity data collection by 2027

Overview of Application Changes



Overview of Changes to RELD SOGI and Member Sex Fields

MassHealth and the Health Connector are updating the questions on race, ethnicity, language, disability, sexual orientation, and gender identity (RELD SOGI) in the member enrollment applications to **better understand** and **address disparities among our member population**.

RELD SOGI Changes Will Be Implemented in a Phased Approach

PHASE 1

We will update the questions on race, ethnicity, and sex, and we will add questions on sexual orientation and gender identity.

Phase 1 is scheduled to go live in July 2023.

July 2023

PHASE 2

We will edit the response options for preferred language and add questions on English proficiency and disability.

Phase 2 is anticipated to go live in December 2023.

December 2023

PHASE 3

We anticipate adding a third possible response to the sex* question.

Phase 3 is anticipated to go live in December 2024.

December 2024

We made these changes to follow CMS's guidance and the recommendations of the EOHHS Quality Measure Alignment Taskforce ([QMAT](#))

*Sex in this context is defined as what the member's sex assigned at birth was.



Major Themes Across All Questions

The tables below provide a high-level summary of the significant changes being made to the application. All data collected is self-reported.*

Updates to questions	Allowing free-text options	Adding non-response options	Allowing to choose more than one option
<p>Newly added</p> <ul style="list-style-type: none">Granular EthnicitySexual OrientationGender Identity <p>Edited</p> <ul style="list-style-type: none">SexHispanic EthnicityPreferred Language	<ul style="list-style-type: none">_____ not listed here, please specify <p>Applicants can use this option if their answer is not one of the options in the form.</p>	<ul style="list-style-type: none">Choose not to answerDon't know <p>Choose not to answer: The applicant or member actively chooses to not provide information</p> <p>Don't Know: The applicant does not know the answer to the question</p>	<p>The race, granular ethnicity, sexual orientation, and gender identity questions allow members to select up to five response options</p> <p>The applicant may select up to five response options</p>

*Self-reported data is data that has been provided by either (a) **the member** or (b) **a person who can act on the member's behalf** (e.g., parent, spouse, authorized representative, guardian, conservator, holder of power of attorney, or health care proxy).



RELD SOGI Changes – Important Notes

It is critical for MassHealth personnel to let applicants or members know that we are asking about RELD SOGI because **MassHealth wants to make sure we are meeting *everyone's* needs regardless of identity.**

As you are working with the applicant, let them know that MassHealth is collecting this data in order to provide them the best quality of care because we realize that every patient has a unique set of health needs. It can be helpful to remind applicants that these questions are asked of *all* our members. It is also important to point out that providing most of this information is completely voluntary, which means they can either skip the question or select the option to choose not to answer.

Information Collected **IS OPTIONAL:**

- ✓ Some RELD SOGI questions require a selection, but the **information is optional**, as **applicants can select non-response options**

Information Collected **DOES NOT:**

- ≠ Impact an applicant's **immigration status**

RACE



What is Race?

Race is a person's **self-identification with one or more social groups**.** People have to select one response option and can select up to five races.

Question: What is <member's name>'s race?

Response Options*: *Select up to five options*

People can select up to five races. This question is not required, but please encourage applicants to provide an answer, even if it is "Choose Not to Answer."

American Indian or Alaskan Native: A person having origins in any of the original peoples of North and South America (including Central America) and who maintains tribal affiliation or community attachment.

Black or African American: A person having origins in any of the Black racial groups or Africa.

Asian: A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.

White: A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.**

Native Hawaiian or Other Pacific Islander: A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

Non-Response Options:

Choose Not to Answer: The applicant or member actively chooses to not provide information.

Don't Know: The applicant does not know the answer to the question.

*Definitions of racial categories provided by the US Census website. We provide them for informational purposes only.

**Definition of race-is based on the definition included in the US Census.



Current Application Screenshots: Ethnicity & Race

Application Year 2023 Start Your Application **Family & Household** Income Additional Questions Review & Sign

First Name, Last Name - Ethnicity & Race (optional)

Please help us support equity initiatives

MassHealth and the Health Connector are committed to providing equitable care for all members regardless of race, ethnicity, or language spoken. Please consider completing these questions to help us meet your language and cultural needs. Know that your response is voluntary, confidential, will not impact your eligibility, nor be used for any discriminatory purpose.

While providing ethnicity and race information is optional, it is strongly encouraged. If you do not want to share this information, please select the "Choose not to answer" option. If no selection is made, the application will record your ethnicity and race as "unknown".

Is **First, Last** of Hispanic, Latino, or Spanish origin?

Yes No Choose not to answer

Race: (check all that apply.)

American Indian or Alaska Native

Asian Indian

Black or African American

Chinese

Filipino

Current Application Screenshots: Ethnicity & Race (continued)



is Kareem Emara of Hispanic, Latino, or Spanish origin:

Yes No Choose not to answer

Race: (check all that apply.)

- American Indian or Alaska Native
- Asian Indian
- Black or African American
- Chinese
- Filipino
- Guamanian or Chamorro
- Japanese
- Korean
- Native Hawaiian
- Other Asian
- Other Pacific Islander
- Samoan
- Vietnamese
- White or Caucasian
- Other:

Enter other race

Choose not to answer

Save and Continue



How is the Race Question Changing from Previous Applications?

Currently, the question asking for a member's Race is **not required**.

Information on Applicant Screen

With the upcoming changes in Phase 1 answering the **question about race becomes required** but providing specific information is **optional**.

i.e. Applicant can select non-response options.



Question
What is <Member's Name>'s race? (Select up to five choices)
Tool Tips
Race refers to a person's self-identification with one or more social groups. Individuals may report multiple races.
Response Options
American Indian or Alaska Native
Asian
Black or African American
Native Hawaiian or Other Pacific Islander
White
Race is not listed here, (please specify)_____
Don't know
Choose not to answer

ETHNICITY



What is Ethnicity?



Ethnicity is a **person's ethnic origin or descent**,

"roots," or heritage, or the place of birth of the person or the person's parents or ancestors.

"Ethnicity refers to the identification of a group based on a perceived cultural distinctiveness that makes the group into a "people." This distinctiveness is believed to be expressed in language, music, values, art, styles, literature, family life, religion, ritual, and food."

Hispanic/Latino Ethnicity

Hispanic/ Latino Ethnicity refers to someone of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race.*

Examples of Hispanic ethnicities:
Mexican, Mexican-American, Chicano, Other Hispanic, Latino, Puerto Rican

vs

Granular Ethnicity

Granular Ethnicity refers to "A person's background, heritage, culture, ancestry, or the country where they or their family were born."**

Examples of granular ethnicities:
African, Chinese, European, South American

*Definition is based on the definition included in the [US Census](#).

**Definition of Granular Ethnicity included is based on the definition adopted by the Massachusetts Department of Public Health



Granular Ethnicity

Applicants are not required to answer this question.

Question: What is <Member's Name>'s ethnicity?

Response Options: *Select up to five options**

African	Central American	Guatemalan	Portuguese
African American	Chinese	Haitian	Puerto Rican
American	Colombian	Honduran	Russian
Asian Indian	Cuban	Japanese	Salvadoran
Brazilian	Dominican	Korean	South American
Cambodian	Eastern European	Laotian / Lao	Vietnamese
Cape Verdean	European	Mexican	Ethnicity is not listed here, (please specify)_____
Caribbean Islander	Filipino	Middle Eastern or North African	

Non-Response Options:

Choose Not to Answer: The applicant or member actively chooses to not provide information.

Don't Know: The applicant does not know the answer to the question.

**An applicant may select "Ethnicity is not listed here" as well as other ethnicities, up to five responses in total*



Hispanic Ethnicity

Applicants are required to answer this question.

This question is not required, but encourage applicants to provide an answer, even if it is “Choose Not to Answer.”

Question: Is <Member's Name> of Hispanic or Latino origin or descent?

Response Options:

Yes, Hispanic or Latino

No, Not Hispanic or Latino

Non-Response Options:

Choose Not to Answer: The applicant or member actively chooses to not provide information.

Don't Know: The applicant does not know the answer to this question.

LANGUAGE

Language



Preferred Spoken Language

Finding out a person's spoken language helps us make sure the user gets equitable access and services.

Preferred Written Language

This information may determine which language written notifications will be provided.

Changes to Preferred Language Questions

- **Previously optional, Preferred Written and Spoken Language will now be required**
- **Members can only choose one answer.**
- "Don't Know" has been added as a response option. If "Don't Know" is selected, English will be the default Preferred Written Language for noticing
- Preferred Written and Spoken Languages may be the same or different from one another

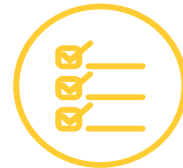
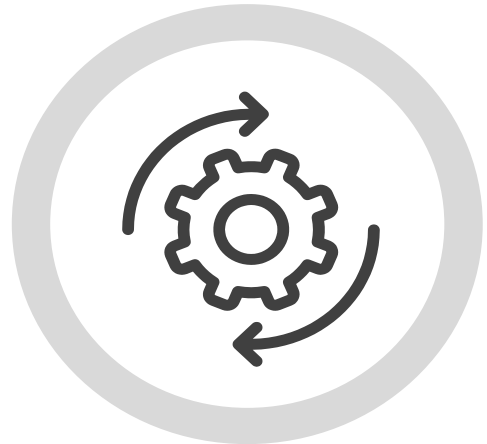
SOGI (SEXUAL ORIENTATION AND GENDER IDENTITY) AND SEX



How Are the SOGI and Member Sex Questions Changing from Previous Applications?

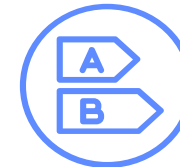
Previously, when collecting the **member sex data**, MassHealth applications classified that as “Sex.” This language is changing, but this **question has been and will still be required**. And MassHealth is adding two additional questions to capture the more nuanced identities that individuals would like to report.

New Additions for Phase 1



Questions regarding **sexual orientation** and **gender identity** are new and optional. Individuals can choose to provide an answer or skip the questions.

There are **non-response options** for these questions as well.



The question regarding “Sex” will now read “**Sex assigned at birth.**”

Applicants will be required to select either **Male or Female.**



Sex Assigned at Birth

Sex Assigned at Birth

Sex assigned at birth is usually the sex that was originally listed on your birth certificate. [1]

Sex assigned at birth is the sex (male or female) assigned to an infant, most often based on the infant's anatomical and other biological characteristics. Sex assigned at birth is sometimes referred to as birth sex, natal sex, biological sex, or sex. [2]

Sex assigned at birth can also be **different from legal sex**, which is the **sex that is recognized by the law** and listed on legal documents such as a driver's license.

Male and **Female** are currently the only response options for this question, and applicants will be required to select one of these responses. We plan to add a third response option in the future.

[1] This sentence is the tool tip language that appears in the online application when someone hovers over the ⓘ icon that appears next to "What was <Member's Name> sex assigned at birth?" ⓘ

[2] This definition of sex assigned at birth is based on the definition within Fenway Institute's [LGBTQIA+ Glossary of Terms for Health Care Teams](#) (February 2020)



Sexual Orientation

Sexual orientation is a person's sexual and emotional attraction to another person and the behavior and/or social affiliation that may result from this attraction (lesbian, gay, bisexual, etc.). Members are not required to provide an answer.

Question: Which of these best describes <Member's Name>'s current sexual orientation?

Response Options: *Select up to five choices**

Straight or Heterosexual: A man who is primarily attracted to women or a woman who is primarily attracted to men.

Lesbian or Gay: A person who is attracted primarily to members of the same gender. Gay is most frequently used to describe men who are attracted primarily to other men, although it can be used for men and women. Lesbian is used to describe women who are primarily attracted to other women.

Bisexual: A person who is attracted to both people of their own gender and other genders.

Queer, Pansexual, and/or Questioning: Queer describes a person who identifies their sexual orientation as outside of societal norms. Pansexual describes a person who is emotionally and physically attracted to people of all gender identities, or whose attractions are not related to other people's gender. Questioning describes a person who is unsure about or is exploring their sexual orientation.

Sexual Orientation is Not Listed Here: Applicant will be directed to specify.

Non-Response Options:

Choose Not to Answer: The applicant or member actively chooses to not provide information.

Don't Know: An applicant does not know the answer to this question.

*Definition and response options adopted from [CDC recommendations](#)

** These definitions are based on the definitions within Fenway Institute's [LGBTQIA+ Glossary of Terms for Health Care Teams \(February 2020\)](#)



Gender Identity

Gender identity is **an individual's sense** of self as man, woman, transgender, and/or something else. Members are not required to provide an answer.

Question: Which of these best describes <Member's Name>'s current gender identity?

Response Options: *Select up to five choices**

Male: A person whose gender identity aligns with those typically associated with men.

Female: A person whose gender identity aligns with those typically associated with women.

Transgender man/trans man: A person whose current gender identity differs from the sex they were assigned at birth.

Transgender woman/trans woman: A person whose current gender identity differs from the sex they were assigned at birth.

Genderqueer/gender nonconforming/non-binary; neither exclusively male nor female: A person whose gender identity differs from binary gender norms.

Gender Identity is not listed here, please specify

Non-Response Options:

Choose Not to Answer: The applicant or member actively chooses to not provide information.

Don't Know: An applicant does not know the answer to this question.

*Definition and response options adopted from [CDC recommendations](#)

APPLICANT SCENARIOS



Best Practices for Data Collection

- **Self-reported data:** Data that has been provided by either (a) the member or (b) a person who can act on the member's behalf (e.g., parent, spouse, authorized representative, guardian, conservator, holder of power of attorney, or health care proxy).
- Ask if the individual needs **interpreter assistance**.
- **DO NOT** assume an individual's demographic information from appearances or looks.



Best Practices for Data Collection (continued)

How do you collect data in a **sensitive and inclusive** way? Remember:

- This information may be sensitive to collect because of the broader political and social climate surrounding sexual orientation and gender identity currently. MassHealth and the Health Connector collect this information to help address health disparities and better serve our members, but we should do so being mindful of the existing atmosphere.
- There is no single best set of questions for soliciting information about a person's sexual orientation or gender identity.
- Be straightforward when asking these questions. That might help you get the basic information MassHealth needs without making the applicant feel overwhelmed, uncomfortable, or worried about their privacy.
- A person's SOGI status is a spectrum that may change over time. Applicants may not feel that any of the available answer options perfectly fit them.
- The answers to the RELD-SOGI questions may change as the language changes or as people's identities change.



Hypothetical Scenarios

The following slides will feature some hypothetical scenarios regarding the collection of RELD SOGI data. You can use these slides as a guide for how to navigate these conversations, regardless of the question domain. Below are the possible applicant scenarios we will cover during this session.

- Overview
- Curious Applicant
- Angry Applicant
- Applicant Who Feels Unrepresented
- Child or Adolescent Applicant
- Using Free Response
- Using Non-Response Options



Possible Applicant Scenarios

SCENARIO

"Do I have to answer these questions?"

DISCUSSION

Some applicants may feel uncomfortable, confused, or unsure responding to the application questions.

Make sure to emphasize that we are asking the questions because we're committed to health equity.

SAMPLE RESPONSE

We're asking these questions because we want to make sure we know everyone's needs so we can meet them. Asking these questions can help us with that. Please know that you don't have to give us specific information on these questions - we can select 'choose not to answer' - and we're not going to use the information to discriminate against anyone.

Overview



Navigating Member Questions (slide 1 of 8)

SCENARIO

"Why do you collect this information?"

DISCUSSION

- Some applicants may be confused about why we are asking for this information. In these instances, it is our role to clarify and explain differences in questions and answer options.
 - In these situations, we need to make sure applicants understand why we're asking a question and which answer fits them best.
-

SAMPLE RESPONSE

- "We are collecting this data in order to provide you the best quality of care. We realize that every patient has a unique set of health needs. We feel that it is most important to respect an individual's identity. These questions are asked of all our members and providing most of this information is completely voluntary, allowing you the option to choose not to answer (*with the exception of the member sex question*)."

*Applicant
is curious*



Navigating Member Questions (slide 2 of 8)

Scenario

"Can't you tell just by looking at me?"

DISCUSSION

- Remember, we are giving applicants an opportunity to further explain or capture their identity however they like.
-

SAMPLE RESPONSE

- "I understand why you might feel this way. It would be best if you told me which answer captures your identity the best."
- "To make sure we get the most accurate information, we don't make any assumptions about our members, we would like to get the right information from you. But if you prefer not to answer the question, we have a "choose not to answer" option.
- "We ask this of everybody to make sure that everyone gets the highest quality care"

*Applicant
is angry*



Navigating Member Questions (slide 3 of 8)

Scenario

"Why don't you have an option for me in the gender identity question?"

DISCUSSION

- Some applicants may feel that they are unable to claim all their identities on the application (for example, some applicants may have multiple identities, and some may have identities that are not listed as options)
- Multiple answer choices acceptable on some questions
- For example, for gender identity, an applicant can select Man and "Gender identity is not listed here (please specify)"
- There are some identities, for example Agender, that are not on the list

SAMPLE RESPONSE

- "We want to make sure we can accommodate your identity however you feel most comfortable reporting it. We understand that we don't have every identity listed. There is an answer option, "Gender identity is not listed here (please specify)", that you might want to use."

*Applicant
Who Feels
Unrepresented*



Navigating Member Questions (slide 4 of 8)

SCENARIO

"I don't know what my 3-year old's gender identity is."

DISCUSSION

- Some applicants may be children or adolescents - in this case, parents / guardians will fill out the relevant fields on the application.
 - Parents might understand the categories but not know which one is right for their child. Remind parents that they can use 'Choose Not to Answer' or 'Don't Know.'
 - Do not make assumptions, generalizations about identities, or use examples to demonstrate the answer choices.

*Parents
/Guardian
Completing on
Behalf of Child
or Adolescent
Applicants*

SAMPLE RESPONSE

- "There are several answer choices for this question, so let me walk you through them. Does your child think of themselves most as a girl, a boy, or another category? If none of these sounds right, you can give me a different answer to write in. Or I can mark 'don't know,' or we can skip it or mark 'choose not to answer'"



Navigating Member Questions (slide 5 of 8)

SCENARIO

"Why are you asking about my 3-year old's sexual orientation? That is inappropriate and I'm not going to answer that question."

DISCUSSION

- Some applicants may be children or adolescents - in this case, parents / guardians will fill out the relevant fields on the application.
 - Parents might understand the categories but not know which one is right for their child. Remind parents that they can use 'Choose Not to Answer' or 'Don't Know.'
 - Do not make assumptions, generalizations about sexual orientation, or use examples to demonstrate the answer choices.

*Parents
/Guardian
Completing on
Behalf of Child
or Adolescent
Applicants*

SAMPLE RESPONSE

- "That is completely understandable if you don't know. You can select "Don't know" or, since this question is optional, you can either skip it or mark the "Choose not to answer" option."



Navigating Member Questions (slide 6 of 8)

*Using
Free Response
Option*

Scenario

"I identify as both a lesbian and as asexual. I see that lesbian is an option, but asexual is not. How do I indicate my identity?"

DISCUSSION

- Select the "____not listed here, please specify" response option if:
 - An applicant knows their identity, but it is not one of the listed options.
 - An applicant has multiple identities, and few/none are listed, for example, they are gender nonconforming and identify as androgyne, they can add it here.

SAMPLE RESPONSE

- "Thank you for that important information. For the sexual orientation and gender identity questions, you can provide multiple options, unless you choose 'don't know' or 'choose not to answer.' If you pick one of those, you can't also pick another option. In this case, you can choose both 'lesbian' and 'sexual orientation is not listed here.' Under that second option, I can write in 'asexual.' Would you like me to do that?"



Navigating Member Questions (slide 7 of 8)

SCENARIO

"This feels like very personal information to share."

DISCUSSION

- This information is self-reported. If an applicant does not feel that any of the answers describes them, they can choose other answers, like 'I don't know,' 'choose not to answer,' and '____ is not listed here (please specify).' In some cases, they can also skip the question altogether.

SAMPLE RESPONSE

- "I understand that you are not comfortable sharing this information with me right now. This question is optional. If you want, I can put down 'choose not to answer.' Would you like for me to do that?"

*Using
"Choose Not to
Answer"*



Navigating Member Questions (slide 8 of 8)

SCENARIO

"Honestly, I'm not really sure how I identify right now."

DISCUSSION

- Select the "Don't Know" response option if:
 - The applicant wants to answer this question but genuinely does not know the answer, even after seeing a list of racial categories as well as being given the option to write something in.
-

SAMPLE RESPONSE

- "Sometimes it's hard to know, and we have the 'don't know' option for just this situation. Since we've talked through the question and you don't have a specific category to write under 'please specify,' your best choice might be 'don't know.' Can I mark 'don't know' for you?"

*Using
"Don't Know"*



Thank you!