# Milestone 5 Implementation guidance checklist

##### Collecting, Documenting, and Maintaining Member-Reported Demographic Data

##### Data Collection

* Data Collection workflows:Develop documentation on workflows and include details on:
	+ Data to be collected: Age, gender, race, ethnicity, sexual orientation, and gender identity.
	+ When and who will collect data: This could be at the point of registration by the front office/support staff or during the patient visit by the practitioner.
	+ How data will be entered into the EHR: work with your vendor to update or customize modules or fields.
* Standardized Intake Forms: Develop a standardized intake form for collecting member-reported demographic data. Ensure it aligns with statewide data standards[[1]](#footnote-2) and is user-friendly.
	+ Access the Fenway Health New Client registration form from the appendix for an example of a standardized intake form.
	+ Once established, take screenshots of the fields on intake forms to document each of the demographic variables for which the practice collects data, including the question format and the member response options for each variable. The screenshots will need to be submitted along with your milestone #5 protocol.
* Staff Training: Conduct training sessions or provide training for staff on how to collect this sensitive information respectfully and accurately.
	+ See the reference list for training options and resources.

##### Data Documentation & Maintenance

* EHR Integration: Document protocols for integrating and recording member-reported demographic data and interactions with members into EHR systems while maintaining privacy standards. Preparation:
	+ Verify your EHR has the capacity to record additional demographic data fields, including Sexual Orientation and Gender Identity (SOGI) data.
		1. If not, update to the most current system version.
		2. Connect with your vendor or, if ECW user, ask your PPM to connect you with the EQH Director of practice transformation.
	+ Verify whether data view, especially SOGI data, differs among users. (physician vs. Front desk staff)
		1. This data should be accessible among **all** practice team members.
	+ Contact your EHR vendor to update/make available the new demographic fields. See the reference list for guidance on how to go about this process.
	+ Take screenshots of EHR fields to document each of the demographic variables for which the practice collects data, including the question format as well as the member response options for each variable. The screenshots will need to be submitted along with your milestone #5 protocol.
* Data Privacy**:** Ensure data privacy policies and procedures cover access, use, sharing, and confidentiality.
	+ Documented procedures should specify information on:
		1. which practice staff can access which level of data,
		2. how access to data may vary based on device, how the practice protects data based on device,
		3. permissible and impermissible use of data and how the practice communicates with members and updates its policies and procedures related to data sharing and confidentiality.

##### Stratifying Performance on Quality Incentive Measures

* Data Reporting: Documentation should include details on:
	+ Processes for reconciling differences in the member’s EMR between the most recent member-reported data vs. Data reported by AHCCCS and/or health plans.
	+ Description of the source of referenced data, frequency of receiving the data, processes to pull or receive the data,
	+ Description of how the data is matched from one system to another.
	+ Description of how stratified metrics are generated.
	+ Accountable position for stratifying performance on quality incentive measures using clinical data stratified by member-reported demographic data and/or HRSN data.
	+ If receiving assistance from ACO/CIN, and how.
* Performance Improvement: Use the insights gained from the stratified data to enhance quality incentive measures and improve overall performance.
	+ Develop review procedures that detail who is involved and what performance improvement strategies will be established.

References

* + - 1. Fenway Health. Client Registration and Consent for Treatment Form. TH-128 Version 15 Feb 2021. Accessed May 6, 2024. Available at: <https://fenwayhealth.org/wp-content/uploads/New_Client_Registration_V15.pdf>
			2. National LGBTQIA+ Health Education Center. SO/GI Data Collection Demonstration Videos. The Fenway Institute. Accessed May 6, 2024. Available at: <https://www.lgbtqiahealtheducation.org/courses/so-gi-data-collection-training/>
			3. National LGBTQIA+ Health Education Center. Learning Resources - Webinars in Collecting Sexual Orientation and Gender Identity Data. Fenway Health. Accessed May 6, 2024. Available at: <https://www.lgbtqiahealtheducation.org/resources/in/collecting-sexual-orientation-and-gender-identity-data/type/webinar/>[[2]](#footnote-3)
			4. The Fenway Institute and NORC. The Nuts and Bolts of SOGI Data Implementation: A Troubleshooting Toolkit. The Fenway Institute and NORC; 2019. Accessed May 6, 2024. Available at: <https://assets2.hrc.org/files/assets/resources/Implementing_SOGI_Data_Collection_Practices.pdf>
1. AHCCCS data standards will be available in Summer of 2024. Sign up for AHCCCS TI Newsletter to keep abreast of updates. [↑](#footnote-ref-2)
2. Note: requires account creation [↑](#footnote-ref-3)