

HEI 2024 Scoring Criteria

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

Criteria 1 – Non-Discrimination and Staff Training	40 Points Total
<p>This criteria encompasses foundational policy implementation and training completion requirements.</p> <p>All questions in this section are scored and must be met in order to attain any tier of recognition</p>	
<p>Patient Non-Discrimination</p> <p>a. LGBTQ+ inclusive Patient Non-Discrimination Policy</p> <ul style="list-style-type: none"> • Policy must include the terms “sexual orientation” and “gender identity and expression” (or “gender identity”) <p>b. Patient non-discrimination is communicated to patients and staff</p> <ul style="list-style-type: none"> • Policy is shared in two ways with the public, typically online and in-print • Policy is shared with staff in at least one way 	<p>5 points</p> <p>5 points</p>
<p>Equal Visitation</p> <p>a. Equal Visitation Policy</p> <ul style="list-style-type: none"> • Policy must allow the patient’s visitor of their choice <p>b. Equal Visitation Policy is communicated to patients and staff</p> <ul style="list-style-type: none"> • Policy is shared in two ways with the public, typically online and in-print • Policy is shared with staff in at least one way 	<p>5 points</p> <p>5 points</p>
<p>Employment Non-Discrimination</p> <p>a. LGBTQ+ inclusive Employment Non-Discrimination Policy</p> <ul style="list-style-type: none"> • Policy must include the terms “sexual orientation” and “gender identity or expression” (or “gender identity”) <p>b. Employment Non-Discrimination Policy is shared with the public</p> <ul style="list-style-type: none"> • Policy is shared with the public in at least one way 	<p>5 points</p> <p>5 points</p>
<p>Staff Training</p> <p>a. Training in LGBTQ+ Patient-Centered Care</p> <ul style="list-style-type: none"> • For new facilities or those that have not previously met the training requirement, key senior executives must complete the <i>LGBTQ Patient-Centered Care: An Executive Briefing</i> 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 <ul style="list-style-type: none"> • 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 <p>b. REVISED -- HEI training options promoted to staff</p> <ul style="list-style-type: none"> • Facility must promote the training options available through the HEI from BOTH the National LGBTQIA+ Health Education Center and The CAL to staff throughout their facility and provide specific information about how to access these trainings as part of the promotion. 	<p>5 points</p> <p>5 points</p>

OR

- Facility must require and promote their own internal LGBTQ+ training for at least 50% or more of employees annually and provide documentation to the HEI to verify that 50% or more of employees have completed this training.

Criteria 2 –Patient Services and Support

30 Points
Total

Four subsections comprise this criteria: LGBTQ+ Patient Services and Support; Transgender Services and Support; Medical Decision Making; and Patient Identification and Data Collection. These criteria subsections are divided into two scoring sections for Criteria 2.

Scoring Section One consists of the first three subsections which are scored together for a maximum value of 20 points. Scoring Section Two is the last subsection, Patient Identification and Data Collection which is scored separately for a maximum value of 10 points. These two scores are combined for a maximum total of 30 points for Criteria 2.

Scoring Section One: There are 18 scored questions in these three subsections. In order to receive the full 20 points for these subsections, a facility must have at least 9 or more of these best practices in place from any of these subsections. Facilities with 5 to 8 of these best practices in place will receive a partial score of 10 for these subsections.

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 publicly promotes a confidential mechanism to make LGBTQ+ specific referrals
- **NEW --** Facility provides and promotes certain HIV specific services
- **REVISED --** Facility provides and promotes 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)
- **NEW --** Facility's new hire training clearly states that the patient non-discrimination policy includes sexual orientation and gender identity and reviews the equal visitation policy and provides definitions or scenarios illustrating how the policies are to be implemented

9 or more
initiatives
=
20 points
(full credit)

5-8 initiatives
=
10 points
(partial credit)

Transgender Patient Services and Support

- Facility has a written policy (or policies) that specifically outline at least three different 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 (distinct from a general LGBTQ+ navigation program)
- Facility provides all gender restrooms in public areas for patients and visitors and/or has clearly posted signage indicating a policy that allows individuals to use the restroom that aligns with their gender identity

<p>Medical Decision Making</p> <ul style="list-style-type: none"> • Facility explicitly informs patients of their right to designate any person of their choice, including an unmarried partner, as medical decision-maker • Staff training about medical decision making specifically includes LGBTQ+ specific information • Facility has a policy or official practices related to the treatment of intersex children that delays medically unnecessary procedures until the patient is old enough to make an informed decision 	
<p>Scoring Section Two: There are 10 scored questions in this subsection. In order to receive the full 10 points in this subsection, 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 5 for this subsection.</p> <p>Patient Identification and Data Collection</p> <ul style="list-style-type: none"> • 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) • Facility provides staff training specifically about collecting and recording gender identity data in the 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 anatomical inventory • EHR system offers explicit options for capturing a patient’s sexual orientation • Facility provides staff training 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 	<p>6 or more initiatives = 10 points (full credit)</p> <p>3-5 initiatives = 5 points (partial credit)</p>

<h2 style="margin: 0;">Criteria 3 – Employee Benefits and Policies</h2>	<p style="text-align: center; margin: 0;">20 Points Total</p>
<p>Similar to Criteria 2, there are two scoring sections in Criteria 3. The first scoring section consists of the two subsections of Equal Benefits and Additional Support for LGBTQ+ Employees.</p> <p>Each subsection in this criteria is scored separately and then combined for a total value of up to 20 points for Criteria 3. The first subsection consists of 15 scored questions and a facility may either receive full or partial credit depending upon the number of initiatives a facility has in place. The second subsection’s score is dependent upon the provision of transgender healthcare benefits for employees at the facility. This practice, alone, is worth 5 points.</p>	
<p style="color: red; margin: 0;">There are 15 scored questions in this section, In order to receive full 15 points in this subsection, a facility must have at least 7 or more of these best practices in place. Facilities with 4 to 6 of these best practices in place will receive a partial score of 10 points.</p> <p>Equal benefits</p> <ul style="list-style-type: none"> • Facility provides healthcare benefits to domestic partners of employees • NEW -- Facility offers LGBTQ+ inclusive family formation benefits regardless of sex, sexual orientation, gender identity and marital status that are equivalent to the family formation benefits offered to non-LGBTQ+ employees and that remove barriers that limit LGBTQ+ individuals from accessing these benefits • Facility’s FMLA-equivalent benefit allows employees to take unpaid, job-protected family and medical leave to care for domestic partners as well as the children of a domestic partner, regardless of biological or adoptive status • NEW -- Facility has an LGBTQ+ inclusive paid family leave policy that allows paid time off to care for domestic partners as well as the children of a domestic partner, regardless of biological or adoptive status and parental leave policies that do not exclude non-birth parents and do not discriminate in access to benefits based on sex, sexual orientation, gender identity and marital status • Facility’s bereavement leave benefit includes the event of the death of a domestic partner or the partner’s immediate family • NEW -- Facility provides employees with an LGBTQ+ benefits guide upon hire and annually during open enrollment OR organization provides access to a benefits concierge service with an LGBTQ+ specialty <p>Additional support for LGBTQ+ employees</p> <ul style="list-style-type: none"> • REVISED -- Facility adopts written gender transition guidelines documenting supportive policies and practices on issues pertinent to a workplace gender transition with a minimum of supportive restroom, dress code and documentation guidance • 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 • Facility’s anonymous employee engagement or climate surveys allow employees the option to identify as LGBTQ+ • Facility’s anonymous employee engagement or climate surveys include question(s) related to LGBTQ+ concerns • Facility’s 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 	<p style="text-align: center; margin: 0;">7 or more initiatives = 15 points (full credit)</p> <p style="text-align: center; margin: 0;">4-6 initiatives = 10 points (partial credit)</p>

<p>This practice is scored independently, is worth 5 points and must be met in order to attain Leader status.</p> <p>REVISED -- Healthcare benefits impacting transgender employees</p> <p>Equal health coverage for transgender individuals for medically necessary care. Baseline coverage MUST include the following items:</p> <ul style="list-style-type: none"> ○ Mental health benefits ○ Pharmaceutical coverage (hormone replacement therapies, puberty blockers for youth) ○ Coverage for medical visits or laboratory services ○ Coverage for reconstructive surgical procedures related to gender reassignment (including reconstructive chest, breast, and genital procedures and related medically necessary procedures such as hair removal prior to genital procedures and revisions) ○ Short-term medical leave <ul style="list-style-type: none"> ● Covered transgender-inclusive treatments and procedures must be clearly listed in the contract documentation and the scope of each benefit must be described clearly in the employee benefits materials so that employees and their eligible dependents can easily understand what is covered ● The plan must eliminate other barriers to coverage. 	<p>5 points</p>
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<h2 style="margin: 0;">Criteria 4 – Patient and Community Engagement</h2>	<p>10 Points Total</p>
<p>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.</p> <p>There are 12 scored questions in this section. In order to receive the full 10 points, your facility must have at least 6 of these best practices in place. Facilities with 3 to 5 of these best practices in place will receive a partial score of 5 for this criteria.</p> <p>LGBTQ+ Community Engagement and Marketing</p> <ul style="list-style-type: none"> ● 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 ● NEW -- Facility includes LGBTQ+ content and/or images in its organic social media posts at least four different times per year, with at least one post on a transgender-specific topic ● REVISED -- Facility has an LGBTQ+ specific logo that is used externally online, in marketing materials, or in other community engagement efforts ● NEW—Facility’s supplier diversity program includes a demonstrated effort to include certified LGBTQ+ suppliers (must be evident in public-facing materials) ● Facility has publicly supported LGBTQ+ equality under the law through taking action on local, state, or federal legislation or regulations <p>Understanding the needs of LGBTQ+ patients and community</p> <ul style="list-style-type: none"> ● Facility’s patient satisfaction surveys allow patients the option to identify as LGBTQ+ ● Facility’s 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 academic and/or clinical research ● NEW -- Facility analyzes patient satisfaction and/or EHR data with an intersectional LGBTQ+ lens to identify LGBTQ+ health and programmatic needs 	<p>6 or more initiatives = 10 points (full credit)</p> <p>3-5 initiatives = 5 points (partial credit)</p>

Criteria 5 – Responsible Citizenship	- Points
<p>This section focuses on known activities that undermine LGBTQ+ equality or patient care.</p> <p>Healthcare organizations can have points deducted from their score if they have policies in place that may lead to discriminatory treatment or a large-scale official or public anti-LGBTQ blemish on their recent records.</p> <p>Both a major deduction of 25 points and a minor deduction of 5 points exist.</p> <p>Major Deduction</p> <p>The deduction of 25 points is for major offenses to the LGBTQ+ that come to the attention of the HRC Foundation. These offenses could include revoking LGBTQ+ inclusive policies and practices or having policies in place and/or engaging in proven practices that are contrary to the organization's written LGBTQ+ patient or employment policies, among other infractions. This deduction is rarely applied and will only be applied after prior notification and discussion with the facility.</p> <p>Minor Deduction</p> <p>The deduction of 5 points is specific to healthcare facilities that either follow a religious directive or have a policy in place that prevents them from providing specific medically necessary treatments. For example, under such policies procedures such as hysterectomy or mastectomy, would be denied to some patients based on a diagnosis of gender dysphoria, however the same treatment would be provided to other patients based on other diagnoses. This may result in discriminatory treatment that is in conflict with their non-discrimination policy—for this we would implement the minor deduction (which offsets the points received for the Patient Non-Discrimination Policy).</p> <p>Facilities with this type of directive or policy in place will only receive the minor deduction if they take certain actions to mitigate the potential for discriminatory situations to occur. If the facility does not mitigate the potential for discriminatory situations, the facility may receive the major deduction.</p> <p>Please see our website for more information about this criteria.</p>	<p>-25 points</p> <p>Or</p> <p>-5 points</p>

HEI 2024 Maximum Score/LGBTQ+ Healthcare Equality Leader	100
HEI 2024 LGBTQ+ Healthcare Equality Top Performer	80-95*
HEI 2024 LGBTQ+ Healthcare Equality Foundational Policies Designation	40*

***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.**

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 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 typically 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 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 Criteria 2: Patient Services and Support, Criteria 3: Employee Benefits and Policies and Criteria 4: Patient and Community Engagement. To achieve this tier of recognition, a healthcare facility must receive full credit in Criteria 1, at least partial credit in Criteria 2 (both scoring sections), 3 and 4, and obtain an overall score 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 the provision of transgender-inclusive health insurance. These facilities receive a top score of 100.

*Training options (that include CME/CEU credits) are available to facilities that complete the survey.

Tier of Recognition	LGBTQ+ Healthcare Equality Foundational Policies	LGBTQ+ Healthcare Equality Top Performer	LGBTQ+ Healthcare Equality Leader
Seal of Recognition	N/A		
Criteria Requirements	Criteria 1 - Non-Discrimination and Staff Training Full Credit	Criteria 1 - Non-Discrimination and Staff Training Full Credit	Criteria 1 - Non-Discrimination and Staff Training Full Credit
		Criteria 2 – Patient Services and Support (Scoring Section One) Partial Credit	Criteria 2 – Patient Services and Support (Scoring Section One) Full Credit
		Criteria 2 – Patient Services and Support (Scoring Section Two) Partial Credit	Criteria 2 – Patient Services and Support (Scoring Section Two) Full Credit
		Criteria 3 – Employee Benefits and Policies (Scoring Section One) Partial Credit	Criteria 3 – Employee Benefits and Policies (Scoring Section One) Full Credit
			Criteria 3 – Transgender Inclusive Healthcare Benefits (Scoring Section 2) Full Credit
		Criteria 4 – Patient and Community Engagement Partial Credit	Criteria 4 – Patient and Community Engagement Full Credit
Minimum Score	Must achieve all 40 points available from Criteria 1	80-95	100