



# SOGI RESPONSE MATRIX

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# How to Use this Response Matrix

This document shares ideas to help increase the consistency and effectiveness of your SOGI data collection practice. The intent is to streamline and clarify the SOGI data collection process by anticipating concerns that may arise when collecting data. The italicized scripts provided below model responses to patient or client concerns. These scripts are not intended to be read word for word; and doing so may feel repetitive or impersonal. Focus on what each response is trying to convey and consider how you can best communicate this to the people you serve. We encourage practicing asking SOGI questions and responding to anticipated concerns with peers and colleagues before you begin the SOGI data collection process.

This response matrix uses the following format:

**Respondent asks general questions and responses to SOGI questions being asked.**

**A respondent's specific anticipated question or objection appears over-lined and in bold.**

- **Response:** Our guidelines for your response appear bulleted.

**A respondent's clarifying or follow-up question may appear indented and in bold.**

- Our guidelines for your response to the clarifying or follow-up question appear bulleted.

## Considerations about Answers to Questions

Respect an individual's answers, including their own language (or choices if you provide categories).

- Allow people to answer and to use as much of their own language as possible.
- Use common sense.
- Refrain from communicating judgment, including about discomfort, refusals, or questions.
- Always assess a person's emotional state, and if a person seems especially distressed by the questions, make it clear that they do not have to answer the questions and that you can move on if they want.

- If a person does not want to answer these questions, move on.

Focus the motivation for the interaction on:

- “This will help us make sure that everyone receives the highest quality of care (or services)”
- Motivating values for collecting SOGI data

| Interviewers may be inclined to say...  | Instead, say this   | Reasoning  |
|---|---|--|
| <p>“I’m asking you these questions because the government says I have to.”</p>            | <p>We ask everyone about their sex, gender identity, gender modality, and sexual orientation. We do this so that everyone receives the highest quality of care and the individual services they need.</p> | <p>People may have strong feelings about government and government services. By using neutral language that focuses on the values statements, you may prevent escalation and improve engagement with the demographic questions.</p>  |
| <p>“I’m asking you these questions because I have to.”</p>                                |   | <p>If you are uncomfortable or express reluctance to ask SOGI questions, it may make people feel uncomfortable or reluctant to answer.</p>   |
| <p>“This will help us hire staff to better meet your needs.”</p>                          |   | <p>This is not done for some financial incentive.</p>  |
| <p>“This will help us make sure <b>you</b> get the best possible care (or services).”</p> |   | <p>By framing SOGI questions as beneficial to everyone, not just to an individual, people may be more likely to answer even if they don’t think doing so will benefit them directly.</p> <p>By using “you” or directive language a patient or client may feel you are making assumptions about their identities.</p> |

# Starting the Conversation

“It has been at least a year since you updated your demographic information/I don’t see that we have your demographic information on file, may we update your demographic data today?”

“We ask everyone about their gender identity, gender modality, and sexual orientation. We do this so that everyone receives the highest quality of care and the individual services they need. Therefore, we ask for this information about you. All information is protected health information and will be kept confidential.”

When catering this message, don't forget these key elements:

1. Ask for consent
2. Clearly state this is for everyone
3. Link data collection to action

## Scenarios & Responses

### Responses to SOGI questions

#### Why are you asking me all these questions?

- **Response:** These questions help us make sure everyone receives the highest quality services. They also help us prevent unfair or unnecessary differences in how we provide our services. We ask the same questions of everyone.

#### How should I answer this question?

- **Response:** I can’t tell you how to answer the question. Answer however you are most comfortable answering, or however you identify. If you are uncomfortable answering the question, you may decline to answer. If you don’t know, you can choose “Questioning” or “Don’t Know”.

Offer to provide clarification on the meaning of the question, include definitions from the [SOGI Glossary](#).

**I don't know.**

- **Response:** That's OK! You may choose "Questioning," or "Don't Know" as your response, or if you like, we can skip this question and come back to it later.

**It's none of your business!**

- **Response:** That's understandable, you may always decline to answer. We ask everybody these questions, because it is important we serve everyone's needs.

**Will my answers to these questions affect my ability to get services?**

- **Response:** Your answers will not harm your services or ability to receive benefits in any way. Answering these questions may help us match your care needs with providers or services. For example, pregnancy, language, or social support needs.

**Respondent becomes emotionally activated or visibly distressed.**

**The participant's responses indicate the person is becoming emotional or reactive.**

- **Response:** Acknowledge their feelings or experiences, then refocus on what is happening in the here and now. Also, you can shift to factual questions or take a break. Acknowledging their feelings:

Actively reflect on their experience back to them, and then give them an option to move on or take a break. For example:

- "I can tell that you're really not happy that we're asking these questions. Why don't we move on to the next question?"
- "I hear you saying that these are invasive questions. We ask everybody these questions, because it is important we serve everyone's needs."

**Acknowledge & message:**

- "I think I may have asked a question you're not comfortable with. It's your choice to answer it or not; we ask everyone the same questions. You can also choose "I don't understand what this question is asking" or "I Don't Know.""

**Refocus on what is happening (someone wanders off in conversation):**

- "I understand these questions may bring up some thoughts/ questions/ concerns for you"

### Shift to other questions:

- “Let’s move on to some other questions and later we can come back to these questions.”\*

\*Please make sure you actually return to the questions (or have a system in place that will prompt you at the end of the interview) if you say you will come back to these questions.

## Responses to gender identity questions

### [When asking about gender identity] Why isn’t Female/Male/Intersex an option?

- **Response:** This is a question about gender identity, not a question about biology. Gender identity is a person’s internal sense of self, whereas sex can refer to what body parts and internal reproductive organs a person has. We want to be as accurate as possible so that we can provide the best possible care and services to all patients/clients. We are distinguishing between gender and sex to be respectful of how people wish to be seen and best understand people’s experiences in our system. We will ask about sex a little bit later.

### I was born Male/Female/Intersex. What should I say?

- **Response:** I can’t tell you how to answer the question. Answer however you are most comfortable answering, or however you identify.

### I am really not sure, what should I say?

- **Response:** I can’t tell you how to answer the question. Answer however you are most comfortable answering, or however you identify. If you don’t identify with any of the choices, you can choose “Not Listed, my [gender/sexual orientation] is \_\_\_\_\_.” There is also a “Questioning” option for people who are in the process of answering this question for themselves.

### Can’t you tell? Can’t you tell by looking at me? Can’t you tell by listening to me?

- **Response:** We find it is better to let people tell us. If you don’t identify with any of the choices, you can choose “Not Listed.” People’s sense of self is not always outwardly apparent.

### Why do you care?

- **Response:** We ask everyone about their sex, gender identity, gender modality, and sexual orientation. We do this so that everyone receives the highest quality of care and the individual services they need.

I'm human.

We are all human beings.

- **Response:** Would you like to write that in under “not listed, my gender is”? Are there any of the listed categories you would like to check as well? Alternatively, you can choose “I don't want to answer”.

### Who looks at this information?

- **Response:** This information will help in shared decision making with your provider around your specific health needs. In addition, as a clinic/system/public health, we are looking at a population level for research and reporting purposes to support positive health outcomes for all patients/clients. It will not impact your services or ability to receive benefits in any way. No one will be able to access your personal information without your consent.

### Will my parents see my answers?

- The answer to this question will vary depending on your institutional policies. It is important to be transparent about who can access a person's information, and with whom information will be shared. When collecting REALD & SOGI data from a minor, this information should be shared before asking any of the questions.

### Will this go in my chart?

- This data will be recorded in your chart. If you would like to speak with us about your gender identity but would rather it not be recorded, we can mark “I don't want to answer” and then talk more about your identity later.

## Responses to Gender Modality question

I am a Woman/Man/I just told you my gender

- **Response:** You did! Some Women/Men/[Gender(s) they just mentioned] are transgender, some are not transgender, and some are questioning or exploring.

**I am Transsexual/A transvestite/[One of Many Terms for Some Kind of Gender Minority], how do I answer this question?**

- **Response:** We want to be respectful and recognize all identities whether or not they are listed here. We don't want to make any assumptions as people's sense of self is not always outwardly apparent. We find it is better to let people tell us. If you don't identify with any of the choices, you can choose "Not Listed, my gender is" and write in a response that best describes you. Additionally, the open-ended question may be a space to describe your identity in more detail.

**I haven't had/don't want a sex change  
I do not take hormones.**

- **Response:** This is not a question about medical intervention [or gender-affirming care]. This is a question about people who identify at least in part as a gender other than the one they were assigned at birth.

**Can't you tell by looking at me?  
Can't you tell by the sound of my voice?**

- **Response:** People's experience with gender is not always outwardly apparent. We find it is better to let people tell us. If you don't identify with either of these choices, there is also a "Questioning" option for people who are in the process of answering this question for themselves.

**Are you questioning that I am really a [Provided gender(s)]?**

- **Response:** No, thank you for asking that. Some [provided gender(s)] are transgender, some are not, and some are questioning. We find it is better to let people tell us. There is also a "Questioning" option for people who are in the process of answering this question for themselves.

**Why do you care?  
Why are you asking me this?  
Isn't that a personal question?**



- **Response:** We ask these questions of everybody to help ensure everyone has access to services to meet their needs. Anything you do share with us is private and confidential.

### Who looks at this information?

- **Response:** This information will help in shared decision making with your provider around your specific health needs. In addition, as a clinic/system/public health, we are looking at a population level for research and reporting purposes to support positive health outcomes for all patients/clients. It will not impact your services or ability to receive benefits in any way. No one will be able to access your personal information without your consent.

### Will my parents see my answers?

- The answer to this question will vary depending on your institutional policies. It is important to be transparent about who can access a person's information, and with whom information will be shared. When collecting REALD & SOGI data from a minor, this information should be shared before asking any of the questions.

### Will this go in my chart?

- This data will be recorded in your chart. If you would like to speak with us about your gender identity but would rather it not be recorded, you can choose "I don't want to answer" and then talk more about your identity later.

## Responses to questions about sexual orientation

**Why do you care?  
We're all human beings.**

- **Response:** We ask everyone about their sex, gender identity, gender modality, and sexual orientation. We do this so that everyone receives the highest quality of care and the individual services they need.

**I don't really fit any of those labels.  
My sexual orientation is not described.**

- **Response:** I understand. These are blunt categories and cannot capture the richness of people’s lives. You are welcome to choose “not Listed, my sexual orientation is” and specify your orientation, or you may choose “don’t want to answer.”

**I Prefer/I use the label [some other sexual identity label, may be an epithet, such as ‘Queer,’ ‘Dyke,’ ‘Fag,’ or ‘Joto’/’Jota’, etc.].**

- **Response:** Ok, thank you. You can use any term that you want. If you don’t identify with any of the choices, you can choose “Not Listed” and specify your orientation, or “I don’t want to answer”.

**I am really not sure.  
What should I say?**

- **Response:** I can’t tell you how to answer the question. Answer however you are most comfortable answering, or however you identify. If you don’t identify with any of the choices, you can choose “Not Listed, my sexual orientation is” and specify your orientation. There is also a “questioning/exploring” option for people who are in the process of answering this question for themselves.

**I’m human.  
We are all human beings.**

- **Response:** Yes, I can understand your feelings. Would you like to choose any of the existing categories, such as “Asexual,” “Not Listed” and specify, “Questioning” or “I don’t want to answer”?

**Who looks at this information?**

- **Response:** This information will help in shared decision making with your provider around your specific health needs. In addition, as a clinic/system/public health, we are looking at a population level for research and reporting purposes to support positive health outcomes for all patients/clients. It will not impact your services or ability to receive benefits in any way. No one will be able to access your personal information without your consent.

**Will my parents see my answers?**

- The answer to this question will vary depending on your institutional policies. It is important to be transparent about who can access a person’s information, and with whom information will be shared. When collecting REALD & SOGI data from a minor, this information should be shared before asking any of the questions.

### Will this go in my chart?

- This data will be recorded in your chart. If you would like to speak with us about your gender identity but would rather it not be recorded, you can choose “don’t want to answer” and then talk more about your identity later.

**Why are you asking me this question, I answered it last visit/year/etc.  
Don’t you already know?  
Isn’t it already in my record?**

- **Response:** People’s experiences and answers can change over time, so we try to ask once a year.

## If asking about pronouns

**How should I answer this question?**

- **Response:** I can’t tell you how to answer the question. Answer however you are most comfortable answering, or however you identify. If you are uncomfortable answering the question, you may decline to answer. If you don’t know, you can choose “I don’t understand what this question is asking” or “I Don’t Know”.

**What do you mean?**

- **Response:** People often respond to specific pronouns for themselves. This is an opportunity for you to tell us what pronoun we should use when referring to you today and in future communications.

Note: People may not know what the word “pronoun” means, especially if English is not their primary spoken language, in this case you can offer examples of pronouns to clarify.

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