



Inclusive Intake: Asking Older Adults SOGI Questions

For home health providers, assisted living communities, and other organizations serving older adults, the intake process is a crucial opportunity to get to know clients, patients, and constituents. It sets the tone for the experience they will have with your facility, staff, and even their peers. But many intake forms and conversations are not designed to collect demographic information in an inclusive way that isolates assumptions and helps teams provide true person-directed care.

Learn how to include sexual orientation and gender identity (SOGI) questions in your intake interviews that incorporate acceptable language and take an intersectional approach to demographics.

Why Collect SOGI?

Your organization's goal is to treat everyone equally, so why are conversations around SOGI an important part of caring for older adults? Because many people are afraid of negative reactions or consequences if they outwardly identify themselves as members of the LGBTQ+ community. By providing a safe, optional opportunity to share this information, you signal that your organization recognizes and affirms the intersectional identities of all individuals, including LGBTQ+ older adults.

- Collect vital demographic data that can be critical to patient care plans, organization decision-making, and general service improvement initiatives
- Send a welcoming message by showing you understand the importance of SOGI as part of a person's history and sense of identity
- Gain a more holistic view of clients to build rapport, avoid operating on assumptions, and determine what support they need
- Meet state SOGI data collection requirements or measure the level of care access and quality that your organization provides to populations
- Help older adults feel accepted and form positive, comfortable, and healthy relationships with new living spaces, staff, and peers



Optimize SOGI Questions

GENDER IDENTITY: Intake demographics often begin with questions about sex, asking if a person is male or female, but they rarely include gender identity—the gender you feel you are on the inside. Ask about gender identity and consider collecting info on sex assigned at birth.

What is your current gender identity? Check all that apply.

- | | |
|--|--|
| <input type="checkbox"/> Male | <input type="checkbox"/> Male to female (transgender female) |
| <input type="checkbox"/> Female | <input type="checkbox"/> Not listed |
| <input type="checkbox"/> Female to male (transgender male) | <input type="checkbox"/> Decline to answer |

Always use chosen names and pronouns, which may be different from what you see on legal documents. If you must use legal variations on a form, explain to a patient, client, or constituent why it's necessary and affirm that you respect their identity.

RELATIONSHIP STATUS: Typical relationship intake questions don't go beyond single, married, and divorced. Show inclusivity by offering statuses such as civil union and living with a partner to recognize a variety of relationships found in the LGBTQ+ community.

What is your current relationship status? Check all that apply.

- | | | |
|--|---|--|
| <input type="checkbox"/> Single | <input type="checkbox"/> In a civil union | <input type="checkbox"/> Widowed |
| <input type="checkbox"/> Never married | <input type="checkbox"/> Divorced | <input type="checkbox"/> Living with a partner |
| <input type="checkbox"/> Married | <input type="checkbox"/> Separated | <input type="checkbox"/> Decline to answer |

Try asking open-ended questions to let interviewees decide what they want to share. Instead of “Are you married?” saying “Tell me about the important people in your life” may yield responses regarding long-term partners, neighbors, friends, and families of choice.

SEXUAL ORIENTATION: It's not common for intake forms to include questions around gender expression and sexual orientation—a person's identity in relation to their primary emotional or physical attraction to others.

What do you think of yourself as? Check all that apply.

- | | | |
|---|-------------------------------------|--|
| <input type="checkbox"/> Lesbian or gay | <input type="checkbox"/> Pansexual | <input type="checkbox"/> Not sure |
| <input type="checkbox"/> Straight or heterosexual | <input type="checkbox"/> Asexual | <input type="checkbox"/> Decline to answer |
| <input type="checkbox"/> Bisexual | <input type="checkbox"/> Not listed | |

*Certain words may carry negative connotations for older adults today, even if they've gained acceptance among younger members of the LGBTQ+ community. Avoid these terms when delivering a verbal intake interview. **queer** | **homosexual** | **alternative lifestyle** | **sexual preference***

Improve Your Approach



Sensing an individual is uncomfortable with SOGI data collection?

Keep SOGI questions optional and conversational in tone. Remind them that responses are a routine part of all intake processes and do not play a role in whether they gain access to your services. Individuals should be able to skip questions, change answers at a later date, and ask for clarification on anything they find confusing.



Not sure when to collect SOGI information?

Appropriate times to ask SOGI questions are during the regular intake process, after someone has been admitted to your community, in counseling meetings, or during healthcare intake sessions. Inappropriate times include pitching or selling your community and conducting rental or job interviews.



Nervous about asking SOGI questions?

SOGI data collection is legal and beneficial for both organizations and the people they serve. Remember that gathering this information is a skill you already have. You're simply making a concentrated effort to improve the way you ask these questions so your team can become more inclusive of LGBTQ+ older adults.

Power Innovation with Inclusivity

Supplement your knowledge and skills to provide culturally sensitive services for all clients, patients, or constituents. Learn more about SAGECare's LGBTQ+ cultural competency training.



212.741.2214



sagecare@sageusa.org



sageusa.care



Connect with SAGECare