



REAL SOGI Job Aid – Providers

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Summary

The REAL SOGI sheet in Sage PM KPI Dashboard provides agency level details from the Race, Ethnicity, and Language (REAL) demographic fields and the Sexual Orientation and Gender Identity (SOGI) demographic fields. This demographic data is captured on the Admission (Outpatient) and Update Client Data forms in Sage. The REAL SOGI sheet can be used to gather statistics on 1) the rates at which the REAL SOGI fields are completed (or left blank) and 2) the breakdown of response options for completed REAL SOGI fields.

Note that each patient can only have one response entered for each REAL SOGI field. That is, data entered into any of the REAL SOGI fields populates the same database table regardless of whether it was entered into the Admission (Outpatient) form or the Update Client Data form. The most recent entry will over-write any previous entry. Therefore, at any given point in time, a patient will have only one Race, Ethnicity, Language, Sexual Orientation, and Gender Identity response entered into their chart (unless the field was left blank and there is no response entry at all).



Sheet Overview

No Protected Health Information (PHI) was used in the examples provided.

This sheet is comprised of seven (7) sections:

- Filters
- Patient Count and Date Sort
- REAL SOGI Blank (Key Performance Indicators and Bar Charts)
- REAL SOGI Completed (Key Performance Indicators and Bar Charts)
- Percentage of REAL SOGI Fields Left Blank (Table)
- Percentage of REAL SOGI Fields Completed (Table)
- Percentage of Patients by REAL SOGI Response Type (Tables and Pie Charts)

Filters

Filters make it easy to drill down to the desired data. The filters are located at the top of the sheet and allow filtering by **Calendar Year**, **Calendar Month**, and **Admission Program**. Note that Fiscal Year is not one of the available filters; this is because Fiscal Year is hard-coded to be associated with billing and REAL SOGI data is not billing related. Therefore, Calendar Year is a more appropriate filter for this data set.

Calendar Year	Calendar Year-Month	Admission Program
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Filter Options	
Name	Description
Calendar Year	Lists the available calendar years.
Calendar Year-Month	Lists the available months, notated by month and year (e.g., Apr 2023)
Admission Program	Lists all provider names.

When a filter is selected, the data tables, calculations, and visualizations on the sheet will automatically adjust to reflect only the selected data.

Patient Count and Date Sort

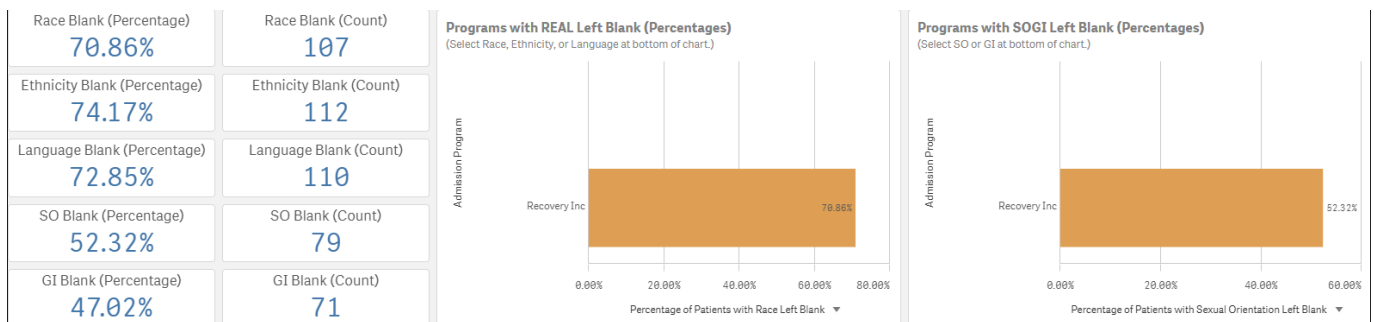
The **Patient Count** provides a numeric count of the total number of unique patients being captured on the sheet. This figure adjusts automatically as filters are selected.

The **Date Sort** field defaults to Service Date. Alternative selections can be made through the drop-down list. It is recommended to select Client Admission.Begin Date for the REAL SOGI data set. On the right-hand side, the selected dates will display in red font.

Patient Count 7,693	Date Sort Client Admission.Begin Date ▼	Client Admission.Begin Date 1982-03-28 to 2025-11-18
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REAL SOGI Blank (Key Performance Indicators and Bar Charts)

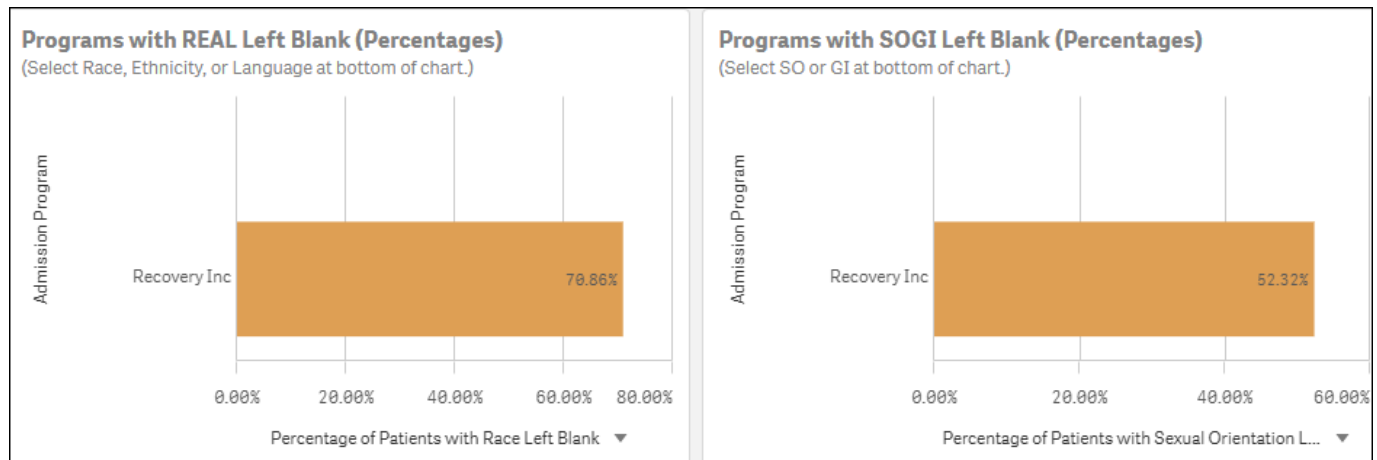
This section is comprised of ten key performance indicators (KPIs) and two bar charts.



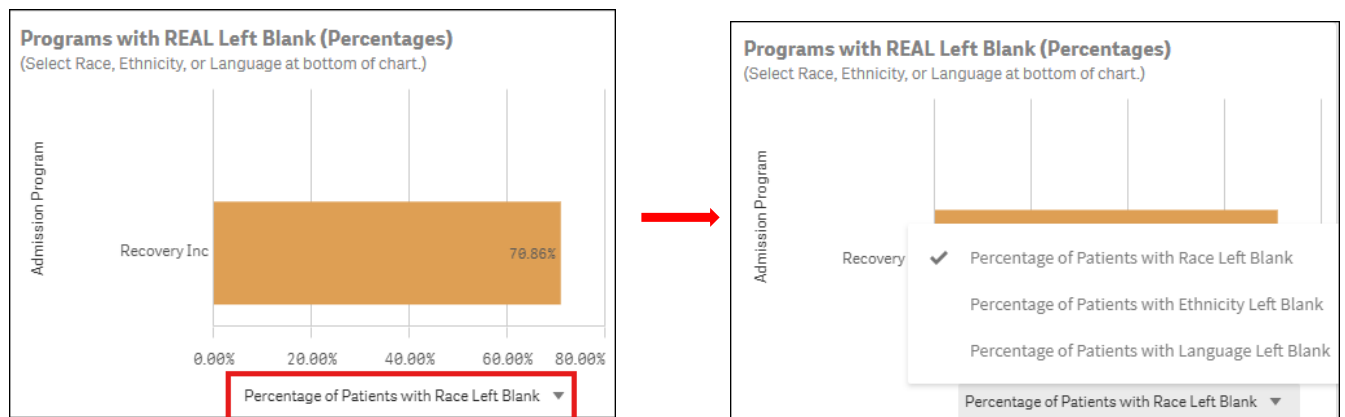
The KPIs are organized into two columns, with the left column reflecting the percentage of each REAL SOGI (Race, Ethnicity, Language, Sexual Orientation, Gender Identity) fields that have been left blank and the right column reflecting the patient count for each REAL SOGI field left blank. In the example below, 70.86% of patients have a blank Race field as indicated in the **Race Blank (Percentage)** KPI box, and 107 patients have a blank Race field as indicated in the **Race Blank (Count)** KPI box.

Race Blank (Percentage) 70.86%	Race Blank (Count) 107
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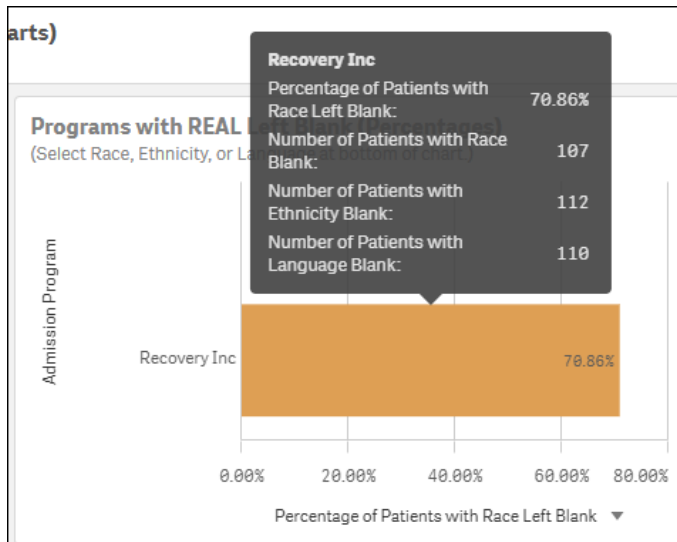
The left bar chart displays the percentage of patients with REAL fields left blank, sorted by provider in descending order for SAPC staff who have access to view multiple providers. The right bar chart displays the percentage of patients with SOGI fields left blank, again sorted by provider for staff with access to view multiple providers. Providers will only be able to see their own agency's data.



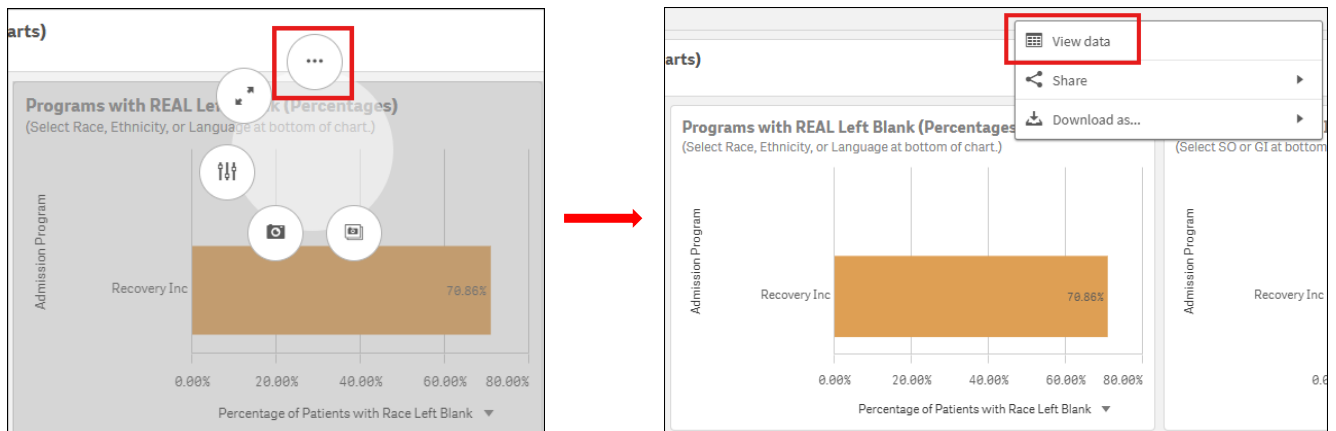
Note that each bar chart displays only one field at a time, with the displayed field noted at the bottom of the chart. A triangle next to the name of the displayed field will allow toggling among the REAL SOGI fields. This is illustrated below with the bar chart for the REAL fields.



Hovering the mouse over a specific bar in the chart will display the percentage of patients at that agency that have the displayed field blank, along with a numeric count of the patients associated with that provider who have a blank field in any of the REAL (or SOGI) fields. For example, hovering over the Recovery Inc. bar in the left bar chart will show that 70.86% of Recovery Inc. patients left the Race field blank, which constitutes a total of 107 patients. The hover box also displays the numeric count of patients at Recovery Inc. with the other two REAL fields blank (i.e., 112 patients have a blank Ethnicity field, and 110 patients have a blank Language field).



All bar charts have the option to view the data in table form. Right-clicking on the bar chart will open an additional menu of options. From that menu, right clicking the ellipsis (three dots) will display an option to View Data.



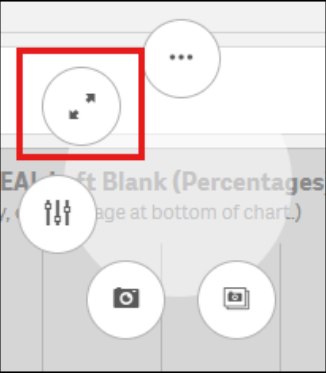
Clicking on View Data will convert the bar chart into table form as shown below. If multiple providers are displayed, clicking on the arrow will switch sorting from descending to ascending order.

Programs with REAL Left Blank (Percentages)

(Select Race, Ethnicity, or Language at bottom of chart.)

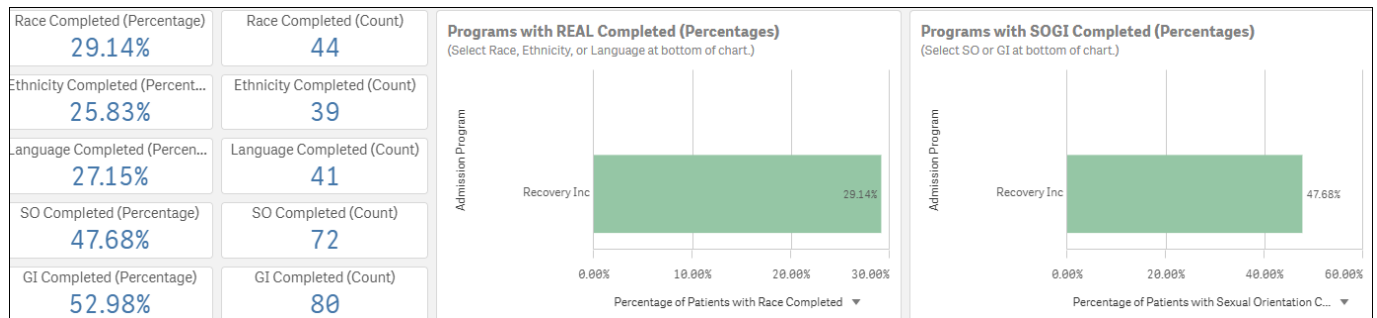
Admission Program	↓ Percentage of Patients with Race Left Blank
Recovery Inc	70.86%

Bar charts can also be expanded to a larger window to increase the amount of data that is visible. Right-clicking the bar chart and selecting the diagonal arrows will expand the chart to full screen.



REAL SOGI Completed (Key Performance Indicators and Bar Charts)

As with the previous section, this section is also comprised of ten KPIs and two bar charts. However, the data displayed in this section reflects metrics associated with *completed* REAL SOGI fields (as opposed to fields left blank). The KPIs and bar charts in this section otherwise function in the same way as those in the previous section.



Percentage of REAL SOGI Fields Left Blank (Table)

The **Percentage of REAL SOGI Fields Left Blank** table displays the percentage of patients with REAL SOGI fields left blank by provider.

Percentage of REAL SOGI Fields Left Blank						
Admission Program	Race	Ethnicity	Language	Sexual Orientation	Gender Identity	
Totals	70.86%	74.17%	72.85%	52.32%	47.02%	
Recovery Inc	70.86%	74.17%	72.85%	52.32%	47.02%	

A Totals row is displayed along the top, which shows the percentage of fields left blank across all providers listed in the table. Providers will only see their own agency's data and so both rows of data will be identical. Note that these figures correspond to the KPIs at the top of the sheet.

In the example above, 70.86% of patients at Recovery Inc. have a Race field that has been left blank, 74.17% of patients at Recovery Inc. have an Ethnicity field left blank, and so on.

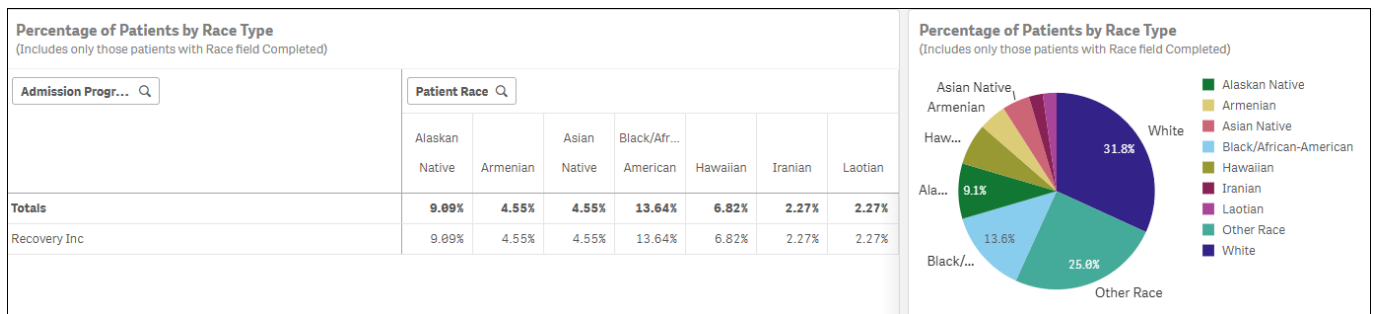
Percentage of REAL SOGI Fields Completed (Table)

As with the previous section, this section is also comprised of a table. However, the data displayed in this section reflects metrics associated with *completed* REAL SOGI fields (as opposed to fields left blank). The **Percentage of REAL SOGI Fields Completed** table in this section otherwise functions in the same way as the table in the previous section.

Percentage of REAL SOGI Fields Completed						
Admission Program	Race	Ethnicity	Language	Sexual Orientation	Gender Identity	
Totals	29.14%	25.83%	27.15%	47.68%	52.98%	
Recovery Inc	29.14%	25.83%	27.15%	47.68%	52.98%	

Percentage of Patients by REAL SOGI Response Type (Table and Pie Chart)

This section is comprised of five sets of tables and pie charts, one set for each of the five REAL SOGI fields. An example of the table and pie chart for the Race field is shown below and will be used for illustration throughout this section.



Note that the tables and pie charts in this section include only those patients who have *completed* REAL SOGI fields. For instance, if the Race field is left blank for a particular patient, that patient is not included in either the **Percentage of Patients by Race Type** table or **Percentage of Patients by Race Type** pie chart.

The tables in this section display the percentages of response options for each REAL SOGI field, by provider. A Totals row is displayed along the top with the total percentage of patients across all network providers with each response type. Providers will only see their own agency's data and so both rows of data will be identical.

Using the **Percentage of Patients by Race Type** table below for illustration, 9.09% of Recovery Inc. patients have an entry of Alaskan Native for the Race field, 4.55% have an entry of American Indian, and so on.

Percentage of Patients by Race Type

(Includes only those patients with Race field Completed)

Admission Progr... 	Patient Race 						
	Alaskan Native	Armenian	Asian Native	Black/Afr... American	Hawaiian	Iranian	Laotian
Totals	9.09%	4.55%	4.55%	13.64%	6.82%	2.27%	2.27%
Recovery Inc	9.09%	4.55%	4.55%	13.64%	6.82%	2.27%	2.27%

If a specific provider or response option is of interest, the table allows for a “search and select” function by clicking the appropriate magnifying glass. This will bring up a list of available options from which to choose.

Percentage of Patients by Race Type

(Includes only those patients with Race field Completed)

Admission Progr... 

Patient Race 

Alaskan Native	American Indian	Armenian	Asian Native	Black/Afric... American	Cambodian
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In the example below, clicking on the magnifying glass next to **Patient Race** brings up all Race response options. In this example, three response options (Alaskan Native, American Indian, and Armenian) are selected. After selecting the desired option(s), click the green checkmark to confirm the selections.

Percentage of Patients by Race Type
(Includes only those patients with Race field Completed)

Admission Progr... Q

Patient Race Q

...

X

✓

Search in listbox

Alaskan Native ✓

Armenian ✓

Asian Native ✓

Black/African-American

Hawaiian

Iranian

Laotian

Other Race

	Alaskan Native	Armenian	Asian Native	Black/African-American	Hawaiian	Iranian	Laotian
Totals	50.00%	25.00%	25.00%				
Recovery Inc	50.00%	25.00%	25.00%				

Percentage of Patients by Ethnicity Type
(Includes only those patients with Ethnicity field Completed)

Clicking the green arrow will restrict the displayed data to only show the selected options. With the selections shown above, only patients that have Alaskan Native, American Indian, or Armenian entered as their Race will be displayed.

Percentage of Patients by Race Type
(Includes only those patients with Race field Completed)

Admission Progr... Q

Patient Race Q

Alaskan Native

Armenian

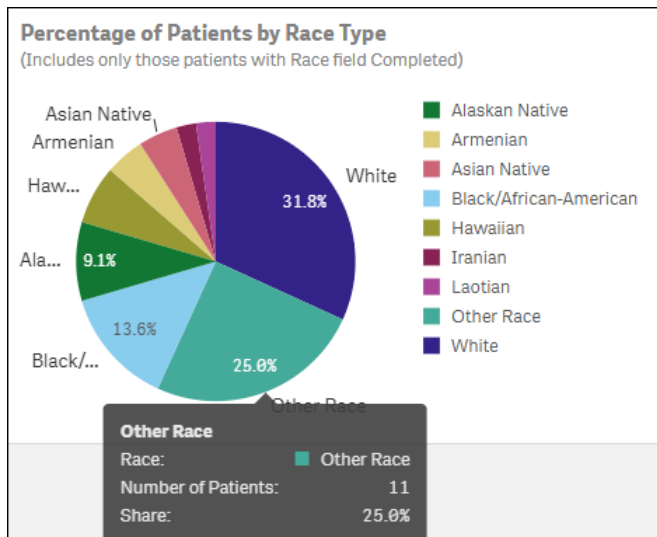
Asian Native

Totals	50.00%	25.00%	25.00%
Recovery Inc	50.00%	25.00%	25.00%

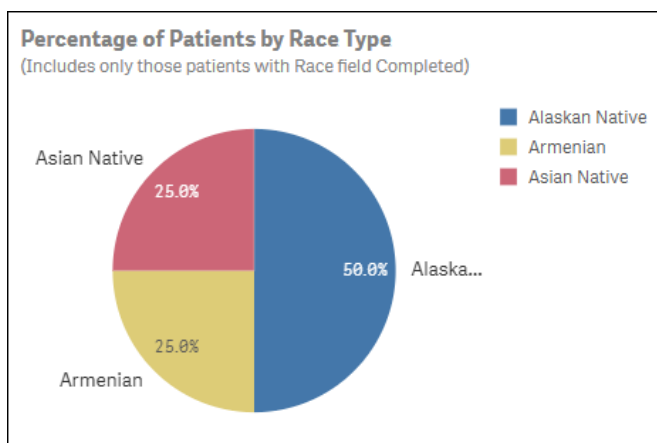
As is the case with other filters on the sheet, visualizations will automatically adjust to reflect filtered data. For instance, with the selections made above, the Patient Count KPI now reads only 8 patients. Any metrics on the KPI sheet are now calculated based off a reduced patient population of 8.

Patient Count
8

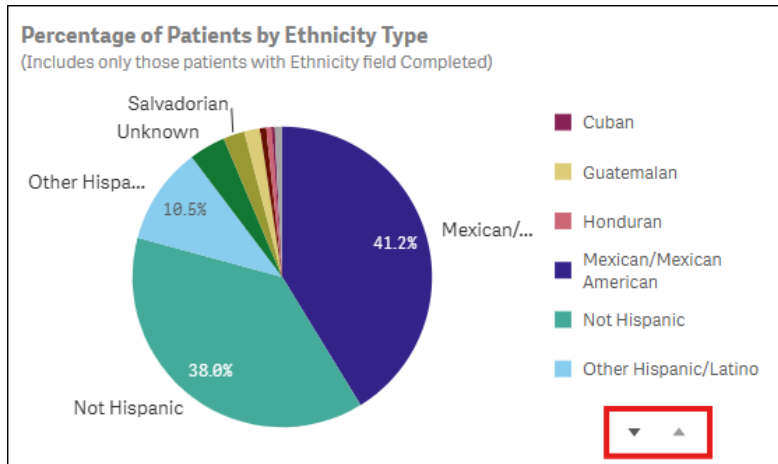
The **Percentage of Patients by Race Type** pie chart displays the percentage of response options in a pie chart format. Hovering over any slice of the pie will also give a patient count. In the example below, hovering over the Other Race slice shows that the 25.0% of patients that have this option selected comprise 11 patients.



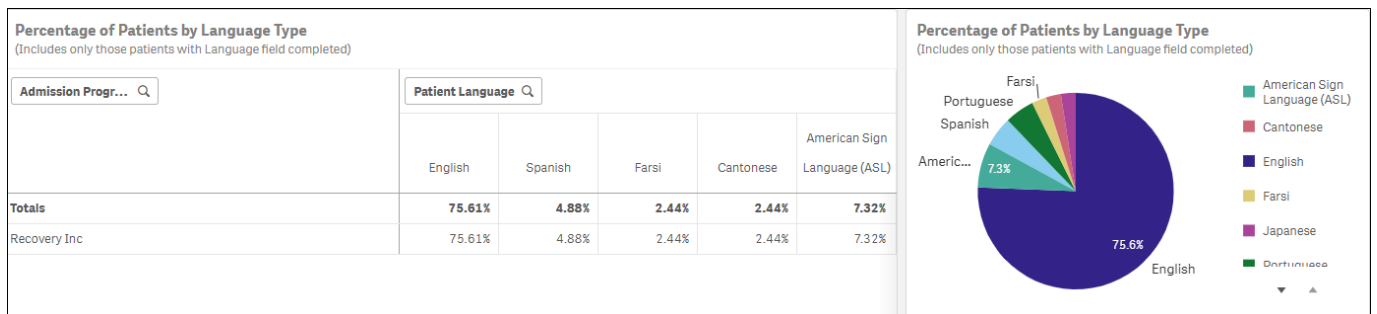
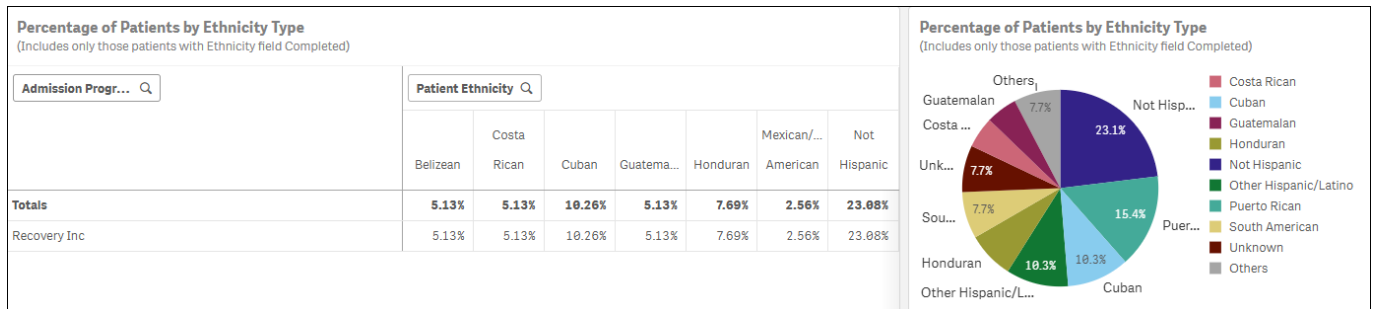
Restricting the data to only patients with Alaskan Native, American Indian, and Armenian **Race** types, as in the example noted previously, will cause the pie chart to adjust accordingly.



If two triangles are observed beneath the legend on the right side of the pie chart, this means that additional response options are listed. These up/down triangles allow scrolling to view all response options.



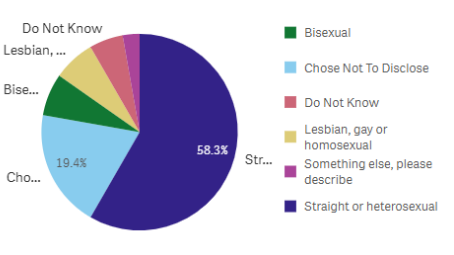
There are corresponding tables and pie charts for the remaining REAL SOGI fields (Ethnicity, Language, Sexual Orientation, and Gender Identity). The functionality of these tables and pie charts are the same as those for the Race field.



Percentage of Patients by Sexual Orientation Type
(Includes only those patients with Sexual Orientation field completed)

Admission Progr... Q	Patient Sexual O... Q				
	Straight or heterosexual	Bisexual	Lesbian, gay or homosexual	Do Not Know	Chose Not To Disclose
Totals	58.33%	6.94%	6.94%	5.56%	19.44%
Recovery Inc	58.33%	6.94%	6.94%	5.56%	19.44%

Percentage of Patients by Sexual Orientation Type
(Includes only those patients with Sexual Orientation field completed)



Percentage of Patients by Gender Identity Type
(Includes only those patients with Sexual Orientation field completed)

Admission Progr... Q	Patient Gender I... Q				
	Totals	Female	Male	Chose not to disclose	Female-to-Male (FTM)/Transg... Male/Trans Man
Totals	100.00%	57.50%	36.25%	1.25%	1.25%
Recovery Inc	100.00%	57.50%	36.25%	1.25%	1.25%

Percentage of Patients by Gender Identity Type
(Includes only those patients with Sexual Orientation field completed)

