

## Asking About Sex & Gender: Guidance and Best Practices

For transgender, nonbinary, and gender non-conforming people, filling out medical in-take and appointment registration forms can create barriers to care. To prevent this, consider the following guidance and samples to help create in-take questions that are inclusive to all gender identities. In addition, better questions facilitate better care, better billing, better and more accurate data, and better practices of inclusion.



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When creating in-take or registration questions about sex and gender the ideal option is to leave the question open-ended to allow respondents to self-identify. However, the reality is that for many forms and electronic health record systems this is not possible due to system constraints and the need for comparable data. If you are charged with creating a multiple-choice question about a person's sex and gender, consider how your data will be used and/or reported and processed.

### BEST:

The minimum options you should have on your gender question are "man," "woman," "none of the above," and "prefer not to answer."

### BETTER:

It is ideal to add additional options to allow for a wider range of answers. Good options include "non-binary" and/or "gender-nonconforming."

It is recommended to make your question a "choose-multiple" option, as some respondents may identify with more than one gender

Always include options of "prefer not to respond" AND "none of the above."

"None of the above" or "prefer to self-describe" are preferred phrasing over "other," as this avoids literally othering respondents who do not fit into the options you've provided. When possible, include write-in option "none of the above."

### **Use language such as "man" and "woman" when referring to gender, as opposed to "male" and "female."**

The best way to differentiate between cisgender and transgender men and women is to ask one question that asks about gender, where the options do not differentiate between cisgender and transgender respondents, and a follow-up question that asks, "Are you transgender?"

**Do not** have the options “male,” “female,” “transgender male,” “transgender female,” (or “man,” “woman,” “transgender man,” or “transgender woman”). This suggests that cisgender men and women are the standard, normal, or default, while transgender men and women are the “other”.

Additionally, this implies that transgender men and women are not men and women, since they are being asked to select an option besides simply “man” or “woman”. If you must differentiate in one question, use options like “cisgender man,” “cisgender woman,” “transgender man,” “transgender woman”.

**Do not** have the options of “man,” “woman,” or “transgender.” Transgender is NOT a gender, but an adjective describing gender. Additionally, this phrasing implies that transgender individuals are not men or women, since they are being asked to select an option other than “man” or “woman” to describe themselves. While some transgender people are outside the gender binary, many transgender people are also men and women.

If you have a clear clinical need to ask about what is often called “biological sex,” instead, consider asking:

“What sex were you assigned at birth?” with options of “male,” “female,” and “prefer not to answer.”

Consider following this questions with “Are you intersex?” with options of “yes,” “no,” and “prefer not to answer.”

***A note on “biological sex”:***

This term is non-specific. While you may need information regarding certain medical information, legal demographics, or intersex identity, *biological sex* does not have a specific consistent meaning.

For example, someone may be intersex, but their assigned sex at birth may be female or male, since most locations only allow male or female on birth certificates.

For example, a transgender man may have had top surgery and changed all legal gender markers to male but still have a menstrual cycle. If you ask about “biological sex” you may get different answers depending on if you mean sex assigned at birth, legal sex (such as for payroll, travel, or insurance benefits), or you are a medical professional inquiring which sex organs a patient may have.

“Legal sex” is also nonspecific. Someone may have different sex markers on their driver's license, passport, social security documentation, birth certificate, etc.

**Do not make assumptions based on questions you did not ask.**

If you ask about sex assigned at birth and gender but do not ask about their pronouns, you do not know that person's pronouns.

## Sample Questions and Options to Consider

Here are several ways to consider asking about gender, sex, and transgender identity. These are just a few possibilities; there is no single best way to ask format and, the best ways have several things in common, as described above. Customize your questions to your clinical needs and center inclusiveness.

### OPTION 1:

1. Please describe your gender (select all that apply)

- ☐ Man
- ☐ Woman
- ☐ Nonbinary or genderqueer
- ☐ Prefer not to answer
- ☐ Prefer to self-describe

2. Are you transgender?

- ☐ Yes
- ☐ No
- ☐ Prefer not to answer

### OPTION 2

1. Please select the option that best describes your gender:

- ☐ Man
- ☐ Woman
- ☐ Nonbinary
- ☐ Prefer not to answer
- ☐ Prefer to self-describe

2. Are you transgender?

- ☐ Yes
- ☐ No
- ☐ Prefer not to answer

### OPTION 3

1. Please select the option that best describes your gender:

- ☐ Man
- ☐ Woman
- ☐ Nonbinary
- ☐ Prefer not to answer

- ☐ Prefer to self-describe
- 2. Do you identify as transgender?
  - ☐ Yes
  - ☐ No
  - ☐ Prefer not to answer
- 3. What is your assigned sex at birth?
  - ☐ Male
  - ☐ Female
  - ☐ Prefer not to answer
- 4. Are you intersex?
  - ☐ Yes
  - ☐ No
  - ☐ Prefer not to answer

### **Note**

Language is a living document. What this means is that language expands and changes over time and people use language differently. Given this, it is recommended to regularly check-in on emerging next practices and assess if the language you are using is resonating within the community you serve. In addition, it is recommended to offer training resources, scripting, and orientation to all staff in patient or data facing roles to be able to explain why these questions are important and included.

### **Resources**

Institute of Medicine (US) Board on the Health of Select Populations. Collecting Sexual Orientation and Gender Identity Data in Electronic Health Records: Workshop Summary. Washington (DC): National Academies Press (US); 2013. 5, Developing and Implementing Questions for Collecting Data on Sexual Orientation and Gender Identity. Available from: <https://www.ncbi.nlm.nih.gov/books/NBK154073/>

The GenIUSS Group. (2014). Best Practices for Asking Questions to Identify Transgender and Other Gender Minority Respondents on Population-Based Surveys. J.L. Herman (Ed.). Los Angeles, CA: [The Williams Institute](#).

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