

Guidance for Collecting Client Data and Referral Information

Acknowledgement of Country

Transcend Australia acknowledges the Traditional Owners of the lands on which we live and work in Naarm: the Gunaikurnai People, Taungurung People, Yorta Yorta People, Bunurong People, Wurundjeri People, Dja Dja Wurrung People, Wadawurrung People, Eastern Maar People, Gunditjmara People, Wotjobaluk, Jaadwa, Jadawadjali, Wergaia and Jupagalk Nations, First Peoples of the Millewa-Mallee, being Latji Latji and Ngintait Traditional Owners.

We honour and pay our respects to their Elders, past, present. We recognise that sovereignty was never ceded. Always was, always will be Aboriginal Land.

The project partners extend our respect to all Aboriginal and Torres Strait Islander Peoples reading this guide. The project partners extend their respect to all Aboriginal and Torres Strait Islander Peoples reading this guide. We particularly acknowledge and pay our respects to gender-diverse Aboriginal people—including Sistergirls, Brotherboys and trans mob—past and present.

The purpose of this guide is to enable health and medical professionals to support trans, gender diverse and non-binary young people to access the services they need at the right time, and to navigate health and social support systems more broadly.

Collaborating Partners



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S1

Guidance for Collecting Client Data and Referral Information

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Guidance for Collecting Client Data and Referral Information

Collecting the necessary client information in inclusive and affirming ways and making appropriate referrals to relevant services are critical to providing culturally safe and gender affirming care to trans, gender diverse and non-binary clients.

Across the health system, medical software and client data collection systems, including intake and referral systems, are currently not designed with the needs and experiences of trans, gender diverse and non-binary clients in mind. The Victorian government requirements for data reporting are outlined in the guidance on inclusive collection and reporting of sex and gender data¹.

Purpose of this Section

The purpose of this section is to support General Practitioners and other health care providers to make high quality referrals to public gender services.

It is important that referrals include relevant and accurate information to ensure they are accepted and processed in a timely manner. This will ultimately improve the experience of trans, gender diverse and non-binary people and their families in navigating the health care system and accessing the services they need.

This section includes templates and guidance on collecting client information in ways that affirm trans, gender diverse and non-binary clients, whilst also meeting mandatory data collection requirements for specialist services in Victorian Hospitals to facilitate quality and timely referrals to TGD services.

1.1 Gender Affirming Principles

When collecting client information for trans, gender diverse and non-binary people, your forms and processes should support the following:

- Recording and using a person's chosen or preferred name, which means allowing for the use of names that are different to what is listed with Medicare or on other legal documents.
- Recording non-binary genders, using a two-step process that asks how a person describes their gender (gender identity), followed by the gender recorded for them at birth (assigned/assumed).
- Recording and using a person's pronouns.
- Only recording sex markers when these are required, for example when documenting Medicare information or making a referral to a Medicare funded service.
- Maintaining privacy and confidentiality by only sharing client information with people who need to access it, and confirming whether the person agrees to their information being recorded on centralised systems such as MyHealthRecord.
- Maintaining the safety of clients by confirming whether it is safe to communicate with them via the contact details recorded, including whether it is safe to send letters to the address provided, to leave voice messages or send messages.

1. Victorian Department of Health (2024). Inclusive Collection and Reporting of Sex and Gender Data. Melbourne. Victorian Government. Available at <https://www.health.vic.gov.au/publications/inclusive-collection-and-reporting-of-sex-and-gender-data>

1.2 Minimum Information for Referrals to Specialist Services in Victorian Hospitals

The Victorian Government mandates the reporting of certain client and provider information, while health services determine what information they require for a referral request to be accepted. This includes The Royal Children's Hospital Gender Service and the Monash Health Gender Clinic. Health professionals should include the following information in their referrals to specialist services within Victorian Hospitals:²

- Patient demographic information
- Referrer demographic information
- Referrer information
- The reason for referral
- The presenting situation (or working diagnosis)
- The service(s) requested
- Required referral information specified by statewide or local referral criteria
- Current patient management
- The impact of the presenting needs or situation on the patient

1.3 Required Referral Information

Health professionals are required to provide the following referral information with their referral request:

- Date of referral
- Indication of whether the patient has agreed to the referral, and agrees to sharing their personal and health information with the health service
- Referring clinician's assessment of clinical urgency
- Required clinical information listed in any referral criteria for the presenting situation

They are also required to provide the main purpose of the referral if the main reason for the referral is:

- Requesting services to establish a diagnosis, provide clinical assessment or inform a treatment plan.
- Requesting partnership care between the patient, GP and the health service (such as patients with chronic or progressive conditions who require ongoing specialist advice or services to improve and optimise people's function and participation in activities of daily living).
- Requesting specific tests or investigations that cannot be ordered, accessed or interpreted through the primary care system
- Requesting treatments or an intervention

1.4 Required Patient Management Information

A summary of the current patient management needs and plan should be recorded, including:

- Current treatment
- Previous treatment and response to this treatment
- Complete and current medication list
- Allergies and previous adverse events
- Relevant medical history including any functional or cognitive impairment
- Relevant family history
- Relevant physical, psychosocial and structural barriers the person experiences which may impact on their access to services
- existing community supports (if any)
- existing advance care directive (if any).

For guidance on Inclusive collection and reporting of sex and gender data, see the Victorian Department of Health's [Guidance Note](#).

2. Victorian Department of Health (2023). *Access to Non-Admitted Services in Victoria*. Melbourne. Victorian Government. Available at <https://www.health.vic.gov.au/patient-care/access-to-non-admitted-services-in-victoria>.

1.5 Recommended Client Information Collection

This table was developed through extensive consultation and reflects community advice on preparing high-quality referrals and client records. Not all the information listed will be relevant or appropriate in every case. Before requesting information, consider the service being provided, the client’s needs and why the information is required.

	Fields	Reason for Collecting
Contact Details	Chosen or Preferred Name	Affirm the client’s gender and identity
	Last Name	Minimum data requirement
	Date of Birth	
	Address	
	Phone (Home)	
	Phone (Mobile)	
	Email Address	
	Safe to send a letter to the address provided above	Ensure the client’s safety
	Safe to leave a voice message	
	Safe to send an SMS	
	Consent to contact via email	
	Preferred method of communication	
Identity	Gender Identity	Affirm the client’s gender and identity
	Pronouns	Minimum data requirement
	Do you identify as Aboriginal or Torres Strait Islander:	Minimum data requirement Inform decisions about priority access
Health ID	Full Name on Medicare Card	Minimum data requirement
	Sex/Gender Marker on Medicare System	
	Medicare Number; Reference Number; Expiry Date	
	Health Care/Pension Card CRN Number; Expiry Date	
Emergency Contact	Full Name	Support client care if required
	Relationship to Client	
	Address	
	Phone Number	

1.6 Recommended Referral Information

	Fields	Reason for Collecting
Referral Details & Purpose	Person requesting the referral (i.e. client, parent)	Inform care decisions and consent requirements
	Client consents to referral and sharing of information?	Minimum data requirement
	Provide a brief description of the reason for referral	
	Is the person seeking gender affirming medical care?	Inform care decisions
	What is the person's pubertal status (under 18s only): • Birth sex assigned/assumed female: Pre menarche/Post menarche • Birth sex assigned/assumed male: Voice deepened/Voice not deepened	Required to prioritise gender affirming medical care at The RCH
Access Needs	Does the person speak a language other than English? Is an interpreter required? Specify language required	Minimum data requirement Enables planning for access support needs
	Does the person require a cultural support person?	
	Does the person have a carer/support person?	
	Are other access supports/accommodations required? Specify support required	
Mental Health	Is the person seeing a mental health provider?	Minimum data requirement Supports coordinated care
	Details of mental health provider:	
	Is the person currently on a mental health care plan?	
	Details of usual GP (if not the referring provider):	
Risk Assessment Screening	Is the person concerned about alcohol or drug use?	Minimum data requirement Inform care decisions
	Evidence of harm from alcohol or drug use?	
	Recent or current self-harm	
	Recent or current suicidal ideation or suicide attempts?	

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	Fields	Reason for Collecting
Risk Assessment Screening (continued)	Currently engaged with a tertiary mental health provider?	Minimum data requirement Inform care decisions
	Any significant legal issues or court involvement?	
	Experiencing or concerned about family or intimate partner violence?	
	Any family violence intervention orders in place? As affected family member (Yes/No) As person using violence (Yes/No)	
	Does the person have any other concerns about their safety?	
Identity	Parent or guardian's name and contact (if applicable)	Minimum data requirement
	If the parents are separated, provide name and contact of second parent	Inform care decisions where legal court orders may be required
	Are there any legal orders in place (i.e. sole parental responsibility child protection)?	
	Is a parent/guardian aware of the request for referral (if client is under 16 years)?	Information required to attend The RCH service
Referrer Information	Name	Minimum data requirement
	Position	
	Organisation	
	Medicare Provider Number	
	Phone Number	
	Fax Number	
	Date of Referral	
	Signature	

If you are a practitioner, here is a list of resources and services that offer training and professional development opportunities:

Transcend Australia

Transcend Australia offers training and capacity building to service providers:
transcend.org.au/our-services/training-and-consultation

AusPATH

To become a member:
auspath.org.au/become-a-member

Thorne Harbour Health

Offer Contemporary TGD Health for GPs training and other resources:
www.thorneharbour.org/services/workforce-training

Victoria's Primary Health Networks (PHNs) and their Health Pathways offer professional development opportunities and resources.

Victorian Government**Inclusive Language Guide**

www.vic.gov.au/inclusive-language-guide/introduction-lgbtqa-inclusive-language-guide

