Clinicians: Documenting a Preferred Name Tipsheet

A preferred first name is a name that you commonly use that is different from your legal first name. Examples: A transgender patient has the legal first name “Jennica” but prefers to be called “Jay.” This patient has preferred the first name is “Jay.”

Try It Out

1. With the Patient’s chart open
2. Select **Patient’s Name** from the patient header

3. Select the lock icon in the **Name** field
   a. Override Safety Lock Alert Appears
      i. Select **Unlock**

4. Select the icon in the **Name** field
5. Enter **Preferred Name**
   a. IE: Jay
6. Select **Accept**

7. The **Preferred Name** now displays in the patient header