

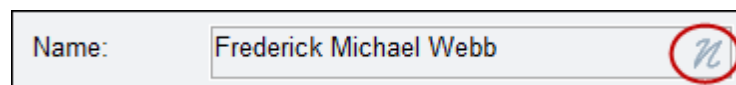
Collect Patients' Legal and Preferred Names (SOGI)

SOGI Tip Sheet

To add personal touch to patient interactions, collect and refer to patients' preferred names during registration and scheduling workflows. A patient's preferred name is the name they choose to be called, different from their legal name. This information is especially important for LGBT patients. Preferred names are shown to providers, nurses, front desk staff, and patients in addition to or in place of legal names.

Record Preferred Names

1. In Registration, go to the **Demographics** form and click the **N** in the **Name** field.



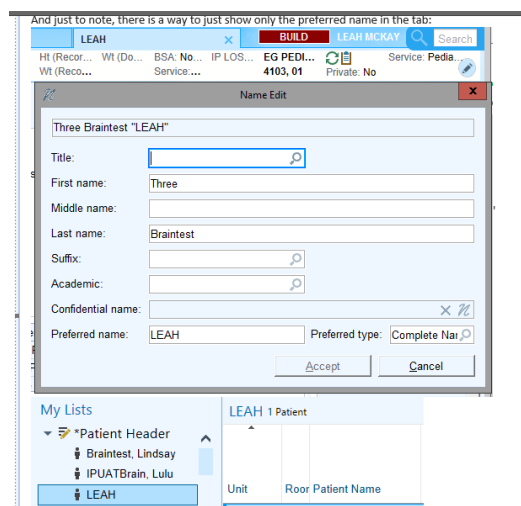
2. Confirm the patient's legal name. Ask questions like these when verifying patients' legal names:

- What is the name on your insurance records?
- What is the name on your driver's license?

3. In the **Preferred name** field, enter the patient's preferred first name. If the patient prefers a different last name, enter the preferred first and last name.

- Ask a question such as "What name would you like us to use?" when collecting patients' preferred names.

4. If you entered both first and last preferred names, enter Complete Name, Preferred in the **Preferred type** field. By default, First Name, Preferred is selected.



Record Preferred Names

Do not store phonetic or "sounds like" names in the **Preferred name** field. To save a patient's phonetic name, go to Registration > Demographics form> **Phonetic name** field.