Gender Identity and Preferred Name Documentation for Clinical Staff and Clerical Staff

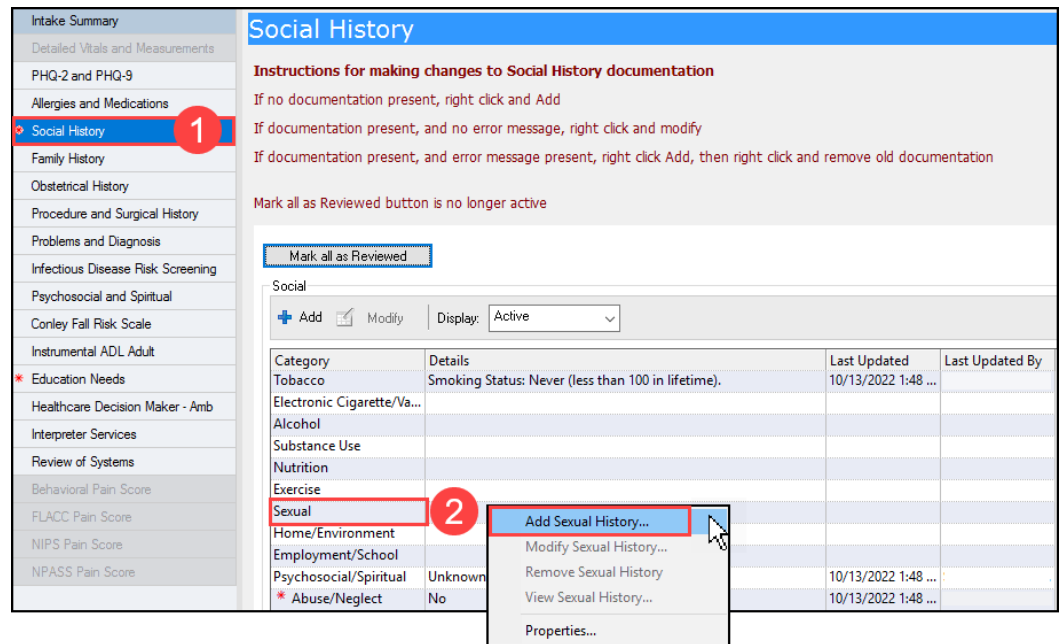Cerner PowerChart Ambulatory **EDUCATION**

Summary: Documentation of a patient's identified gender that differs from their birth sex is completed within Social History by clinical staff during intake and displays an *i* indicator on the patient's demographic bar in PowerChart. Preferred name documentation is completed within Revenue Cycle and displays in both Revenue Cycle and PowerChart.
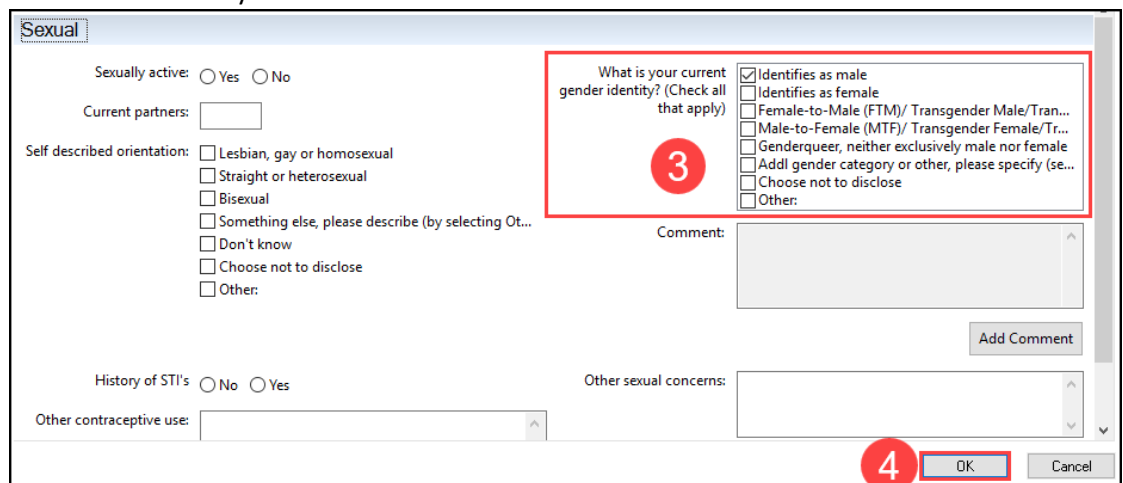
Support: Ambulatory Informatics at 231-392-0229

Patient Gender Identity Documentation

Documentation of a patient's identified gender that differs from their birth sex is completed within Social History.

1. Navigate to Social History within any Intake or Wellness Visit PowerForm.
2. Select the Sexual category with Social History and open the documentation screen by double clicking, or right click and select Add Sexual History.

3. Select the appropriate gender identity(ies).
   a. Select Other to free text information.
4. Document any additional sexual history information needed and click OK.

5. Complete the remaining sections of the Intake PowerForm and sign the form by clicking the green check mark.

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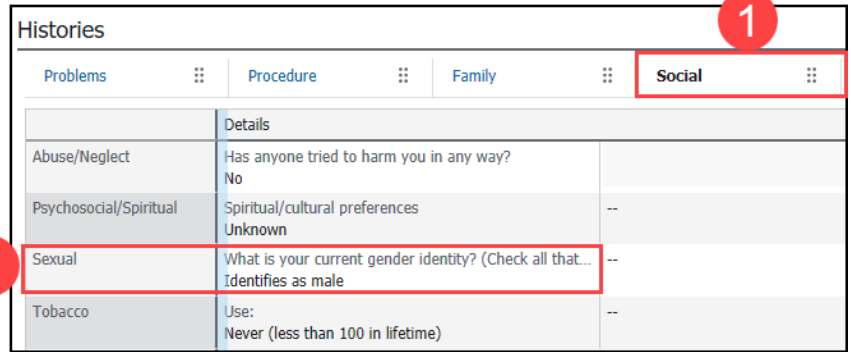
Cerner PowerChart Ambulatory **EDUCATION**

Patient Gender Identity Notification

- Once a patient's appropriate gender identity that differs from their birth sex is documented, an *i* indicator displays on the patient's demographic bar in PowerChart.
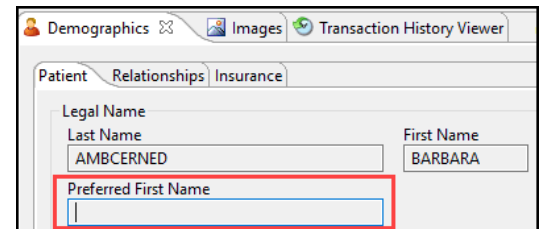
  Sex:Female ⓘ

- To view documented gender identity:

  1. Navigate to the Histories Compenent on the Ambulatory Workflow MPage and select Social.
  2. Gender identity information displays within the Sexual category.

  Histories ①

	Problems	⠿	Procedure	⠿	Family	⠿	**Social**	⠿

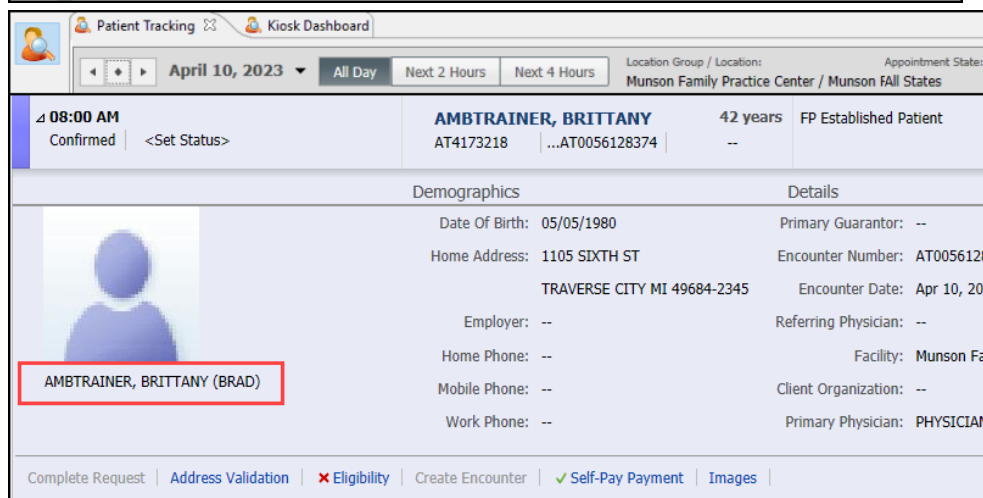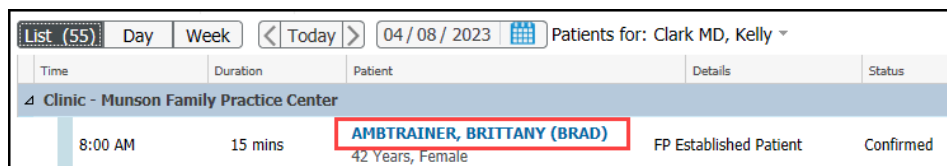 | | Details | |
  |---|---|---|
  | Abuse/Neglect | Has anyone tried to harm you in any way? No | |
  | Psychosocial/Spiritual | Spiritual/cultural preferences Unknown | -- |
  | ② Sexual | What is your current gender identity? (Check all that... Identifies as male | -- |
  | Tobacco | Use: Never (less than 100 in lifetime) | -- |

Patient Preferred Name

- A patient preferred name may be documented within Revenue Cycle by entering the patient's preferred name in the Preferred First Name field within Demographics.

  👤 Demographics ✕ | 🖼 Images | 🕐 Transaction History Viewer

  Patient | Relationships | Insurance

  Legal Name
Last Name	First Name
AMBCERNED	BARBARA

  Preferred First Name
  | |

- The preferred name displays with parentheses on the Ambulatory Organizer in PowerChart and in the patient details on the tracking board in Revenue Cycle.

  List (55) | Day | Week | ◁ Today ▷ | 04 / 08 / 2023 📅 Patients for: Clark MD, Kelly ▾

Time	Duration	Patient	Details	Status
◢ Clinic - Munson Family Practice Center				
8:00 AM	15 mins	AMBTRAINER, BRITTANY (BRAD) 42 Years, Female	FP Established Patient	Confirmed

  👤 Patient Tracking ✕ | 👤 Kiosk Dashboard

  ◀ ◆ ▶ | April 10, 2023 ▾ | All Day | Next 2 Hours | Next 4 Hours | Location Group / Location: Munson Family Practice Center / Munson FAll States | Appointment State:

◢ 08:00 AM Confirmed <Set Status>	AMBTRAINER, BRITTANY AT4173218 ...AT0056128374	42 years --	FP Established Patient

Demographics		Details	
Date Of Birth:	05/05/1980	Primary Guarantor:	--
Home Address:	1105 SIXTH ST TRAVERSE CITY MI 49684-2345	Encounter Number:	AT00561283
		Encounter Date:	Apr 10, 2023
Employer:	--	Referring Physician:	--
Home Phone:	--	Facility:	Munson Fam
Mobile Phone:	--	Client Organization:	--
Work Phone:	--	Primary Physician:	PHYSICIAN,

  AMBTRAINER, BRITTANY (BRAD)

  Complete Request | Address Validation | ✕ Eligibility | Create Encounter | ✓ Self-Pay Payment | Images

- A documented preferred name will also display as a Nickname within the Demographics MPage and within the Patient Information tab on the dark blue Menu in PowerChart.