

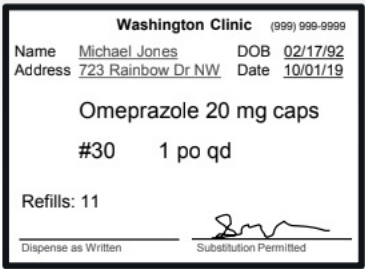
# Quick Guide:

## Qualities of a Gender-Affirming Pharmacy

### GENDER-RELATED DATA MANAGEMENT

Making gender-related data accessible to all pharmacy staff can facilitate respectful communication with transgender and gender diverse patients. However, managing identity information can be difficult in many pharmacy EHR systems, which are often more limited than those of large healthcare systems. Additionally, the lack of standardization in how different pharmacies manage identity information can create challenges. This section includes recommendations on how to advocate for software updates to improve gender-related data management, as well as strategies to triage existing limitations.

The image below shows one way to display preferred name and pronoun information in a pharmacy EHR system.

Jones, Michael* E    02/17/1992    N*    (they/them)				
Patient Info	Allergies/PMH	Third Party	Rx/Tx	Notes
<b>Details</b>	Legal Name	Sarah E Jones		
	Pref Name	Michael		
	Date of Birth	02/17/1992		
	Gender ID	Non-binary (N)		
	Pronouns	They/them/theirs		
	Admn Gender	Female		
<b>Contact</b>	Address	723 Rainbow Dr NW Ames IA 50014		
	Phone	999-999-9999		
	Email	99999@999.com		
	Pref Contact	Phone		
	Auto-Refill	<input checked="" type="checkbox"/>		
<b>Rx Image</b>				
<b>Insurance</b>		Carrier	Husky Scripts	
		Cardholder	Sarah Jones	
		ID #	MJB07141984	
		Rx Group	SD040103	
		Admn Gender	Female	
<b>Notes</b>		NSC	No	
		PCP	Dr. Sam Smith	
		Sex Asgn at Birth	Female	

**Save**

#### ADDITIONAL RESOURCES

This quick guide is excerpted from *Providing Inclusive Care and Services for the Transgender and Gender Diverse Community: A Pharmacy Resource Guide* published by the Human Rights Campaign and the American Pharmacists Association. For the full guide and other quick guides focused on the six qualities of a gender-affirming pharmacy, visit [thehrcfoundation.org/TransPharmacyGuide](https://thehrcfoundation.org/TransPharmacyGuide).



**1 Knowledge of key LGBTQ terms**



**4 Visible symbols of support**



**2 Inclusive communication**



**5 Staff training**



**3 Gender-related data management**



**6 Knowledgeable and patient-centered care**

# RECOMMENDATIONS FOR UPDATING EHR SYSTEMS

## 1. Utilize a preferred name field that is separate from legal name and searchable.

This prevents identity mismatch, which could lead to duplicate patient profiles, by filtering patient profiles by either legal name or preferred name.

Details	Legal Name	Sarah E Jones
	Pref Name	Michael
	Date of Birth	02/17/1992
	Gender ID	Non-binary (N)
	Pronouns	They/them/theirs
	Admn Gender	Female

Washington Clinic (999) 999-9999

Name	Michael Jones	DOB	02/17/92
Address	723 Rainbow Dr NW	Date	10/01/19

Omeprazole 20 mg caps  
#30 1 po qd

Refills: 11

Dispense as Written Substitution Permitted

**Note:** This feature is useful for all patients, not just transgender and gender diverse patients. For example: If a patient whose legal name is “George Joseph Smith” was sent a prescription for “Joe Smith” from his prescriber, a duplicate profile could be created and impede a comprehensive drug utilization review.

## 2. Utilize a field for administrative gender (the gender listed on the patient’s insurance).

This allows for streamlined communication with other entities and prevents billing errors. It also reduces opportunities for mistakes when addressing your patients.

Insurance	Carrier	Husky Scripts
	Cardholder	Sarah Jones
	ID #	MJB07141984
	Rx Group	SD040103
	Admn Gender	Female

Husky Scripts

Member: SARAH JONES

ID: MJB07141984

Grp: SD040103

BIN: 999999 PCN: TPMO

Rx

Incorporate information from preferred name and pronouns into the profile header, using an asterisk to identify differences from the legal name and administrative gender.<sup>5</sup> If possible at your site, also use the preferred name in written communications with your patient (e.g., prescriptions).

Jones, Michael\* E 02/17/1992 N\* (they/them)



<sup>5</sup>Madeline B. Deutsch and David Buchholz, “Electronic Health Records and Transgender Patients—Practical Recommendations for the Collection of Gender Identity Data.” *Journal of General Internal Medicine*, June 30, 2015 (pp. 843-847).

# STRATEGIES FOR TRIAGING EXISTING LIMITATIONS

1. If the addition of separate fields is not possible at your site, utilize pop-up alerts and notes fields to document patient name, gender and pronoun information.

If possible, use the patient's preferred name and store the legal name in the notes field. This prevents routine misnaming of your patient by staff and automated systems.

**Note:** This is comparable to when an insurance company has the incorrect birth date on file – prescriptions must be processed using the incorrect birth date and the correct birth date is stored in the notes field.

**Note:** Many insurance companies verify eligibility using the patient's ID number, birth date, administrative gender and other identifiers rather than the exact spelling of the first name. If an insurance rejection occurs due to the patient's preferred name, explain this to the patient.

## Pop-up Alert

Preferred Name: Michael  
Gender Pronouns: they/them

Patient Notes Close

## Prescription label (Sticker with name and pronouns)

LabelPro™  
Rx Tech  
PHARMACY # (206) 999-9999  
Rx: 67874276 Dr. SAM SMITH  
JONES, SARAH E  
TAKE ONE CAPSULE BY MOUTH DAILY  
OMEPRAZOLE 20 MG CAPSULES  
Qty: 30 NDC: 55111-0364-30 Use Before:  
Refills: 0  
MICHAEL, THEY/THEM  
Rx: 6787426 JONES, SARAH  
Q: 30 NDC: 55111-0364-30  
D: 30 Dr. SAM SMITH  
QOH: 500 Rx: 6787426  
Check Order Point

## Printable patient note (clip on bag)

JONESA7 JONES, SARAH  
OMEP20 OMEPRAZOLE 20 CAPS RDY

1- PATIENT NOTE: Goes by Michael, They/them  
2-  
3-  
4-  
5-

\*=Error Viewed OK=Error Fixed  
H=Hard Halt T=TP Hard Halt  
M=Warning Mesg t=TP Warning Mesg

2. Use acronyms and abbreviations to efficiently use limited notes space, for example:

**AFAB** (Assigned Female At Birth)/**AMAB** (Assigned Male At Birth)

**PN** (Preferred Name)

**GP** (Gender Pronouns)

3. List both the patient's preferred name and legal name in the name field.

**Note:** This has a high risk of outing the patient to others who may or may not be providing care to them. Always explain to the patient how their information can be accessed before storing gender-related information. Since someone's transgender status is private health information, these decisions should be made in collaboration with the patient. Consider adapting the following language: "If you would like, we have the ability to add a preferred name and gender pronouns to your patient record. This will help staff to know how to refer to you respectfully in person and over the phone. However, this information may be accessible to your other healthcare providers when we communicate with them about your medications. Let's talk about some options."

## Legal and Preferred Name in Name Field

Jones, Sarah 'Michael' 02/17/1992 F

Patient Info Allergies/PMH Third Party Rx/Tx Notes

4. Train all pharmacy staff on how to manage gender-related data at your site. This creates a consistent, positive and supportive experience for your patients.