



AIRA

AMERICAN IMMUNIZATION
REGISTRY ASSOCIATION

Guidance on Messaging Preferred Name of Patient

December 2022

Background

Release 1.5 of the Implementation Guide (IG) for Immunization Messaging allows for messaging multiple names for a patient, the first of which must be the legal name of the patient. During discussions to support reporting of [Sexual Orientation and Gender Identity \(SOGI\)](#), it was determined that additional HL7 technical guidance was needed for support of indicating a patient's preferred name.

Gender-marginalized individuals face significant barriers to adequate and culturally responsive health care, leading to numerous health disparities. The **preferred name** is the name that should be used when addressing or referencing the patient. For the purposes of this guidance, the term "preferred name" is interchangeable with "nickname," "call me name," or "name to use." The preferred name enables care providers to use the name that is chosen by the person. Ultimately, this will assist with improved quality of care, reduced clinician burden, and less fragmentation of a person's clinical record. Preferred name is also valuable for other contexts in which a patient may provide a name to be used.

Since the IG's initial publication in 2014, improvements in the name type codes now allow for clearer communication of preferred names in distinction from alias names.

Scope of Guidance

In scope

This document will describe how the preferred name can be messaged in VXU and RSP messages.

Out of scope

This document does not deal with how submitting systems (electronic health record, hospital, or pharmacy systems) or immunization information systems (IIS) should collect and display preferred names of patients.

Expectations of Support

This document does not require that systems conform to the IG to support the ability to send or receive preferred patient names. Systems that do not support the preferred name should ignore this information if sent.

Current Support for Legal and Alias Names

Names associated with a patient are submitted in PID-5 using Extended Person Name (XPN) data type. This data type includes these key fields:

Field	Field Name	Usage	Value Sets
XPN.1	Family Name	Required (R)	
XPN.2	Given Name	Required (R)	
XPN.3	Second and Further Given Names or Initials Thereof	Required if Known (RE)	
XPN.7	Name Type Code	Required (R)	HL70200

The IG currently specifies that the legal name of the patient must always be sent in the first occurrence of PID-5 Patient Name. The legal name is indicated by sending “L” in XPN.7 Name Type Code (PID-5.7). This requirement is not changed by the guidance; sending systems must continue to report legal name in the first occurrence.

The IG also specifies patient name alias by using name type “A,” which indicates “this is a nickname or other assumed name” but does not provide additional guidance. Some systems may currently be using this field to indicate the preferred name.

Value	Description	Definition
A	Alias Name	This is a nickname or other assumed name.

Updated Name Type Guidance from HL7

Since the publication of the current IG, the HL7 community has significantly changed the description from “A” Alias to “A” Assigned and removed the concept of Nickname from the definition.

Value	Display	V2 Concept Comment
A	Assigned	A name assigned to a person. Reasons some organizations assign alternate names may include not knowing the person’s name or maintaining anonymity. Some, but not necessarily all, of the name types that people call “alias” may fit into this category.

The concept of nickname has been moved to "N" Nickname.

Value	Display	V2 Concept Comment
N	Nickname	Nickname /"Call me" Name/Street Name

The current guidance from the IG is that patient's preferred name should be indicated using "N" Nickname in preference to "A" Assigned.

Implementation of Guidance by IIS Community

Sending and receiving systems that wish to send or receive preferred name must use "N" in XPN.7 Name Type Code (PID-5.7) in a PID-5 occurrence after the first one that should contain the patient's legal name. This will ensure the IIS can distinguish preferred names from other assigned names that may have been given to the patient.

This new XPN value will have requirements that differ from the legal name in the first repetition.

Field	Field Name	Base Usage	Preferred/Nickname Usage
XPN.1	Family Name	Required (R)	Required if XPN.2 is not valued, otherwise required if known, C(R/RE)
XPN.2	Given Name	Required (R)	Required if Known (RE)
XPN.3	Second and Further Given Names or Initials Thereof	Required if Known (RE)	Required if Known (RE)
XPN.7	Name Type Code	Required (R)	Required (R), must be "N" for Nickname

If the patient does not indicate either a preferred last or first name, then no repeat of PID-5 should be indicated with Name Type Code of "N."

Examples

A patient with no preferred name:

```
MSH|^~\&|Test EHR Application|X68||NIST Test Iz Reg|20120701082240-0500||VXU^V04^VXU_V04|IZ-123.45|P|2.5.1|||ER|AL|||Z22^CDCPHINVS
```

PID|1||D26376273^^^NIST
MPI^MR||Snow^Madelynn^Ainsley^^^^L|Lam^Morgan^^^^^M|20070706|F
ORC|RE||IZ-783274^NDA

A patient with a preferred first name (with change in bold):

MSH|^~\&|Test EHR Application|X68||NIST Test Iz Reg|20120701082240-
0500||VXU^V04^VXU_V04|IZ-123.45|P|2.5.1|||ER|AL|||Z22^CDCPHINVS
PID|1||D26376273^^^NIST
MPI^MR||Snow^Madelynn^Ainsley^^^^L~**Maddie**^^^^N|Lam^Morgan^^^^^M|
20070706|F
ORC|RE||IZ-783274^NDA

A patient with a preferred last name (with change in bold):

MSH|^~\&|Test EHR Application|X68||NIST Test Iz Reg|20120701082240-
0500||VXU^V04^VXU_V04|IZ-123.45|P|2.5.1|||ER|AL|||Z22^CDCPHINVS
PID|1||D26376273^^^NIST
MPI^MR||Snow^Madelynn^Ainsley^^^^L~**Harris**^^^^N|Lam^Morgan^^^^^M|
20070706|F
ORC|RE||IZ-783274^NDA

A patient with a preferred last and first name (with change in bold):

MSH|^~\&|Test EHR Application|X68||NIST Test Iz Reg|20120701082240-
0500||VXU^V04^VXU_V04|IZ-123.45|P|2.5.1|||ER|AL|||Z22^CDCPHINVS
PID|1||D26376273^^^NIST
MPI^MR||Snow^Madelynn^Ainsley^^^^L~**Harris^Maddie**^^^^N|Lam^Morgan^^^^^M|
20070706|F
ORC|RE||IZ-783274^NDA