



Change of Name, Gender or Pronouns V1.0

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| Document | Change of Name, Gender or Pronouns |
| Purpose | To show the process for changing the above personal details on a person record. |
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| Owner | ICT Business Transformation Team |
| Last Updated | 6/2/2024 |

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Introduction and purpose of guide

This guide shows the process for users to follow if a person has changed their preferred name, gender or pronouns.

Wakefield Council Adult Social Care recognises the importance of embracing diversity within our practice and systems. We are committed to creating an environment where practitioners are equipped to empower people who use our services to ensure their identities are fully recognised. As part of our commitment and wider strategy to embedding equality diversity and inclusion within our practice. We want to support practitioners in recognising and empowering individuals' identities with respect and dignity.

Ensuring accurate and up-to-date person details, especially concerning gender reassignment, names, and pronouns, is important in adult social care. It not only reflects a commitment to respecting individual identities but also contributes significantly to providing person-centred and culturally competent care. Gathering information on gender identity and pronouns is important to allow us to better understand health inequalities. The process of updating these details is an essential step toward creating an inclusive environment where individuals feel seen, acknowledged, and supported in their journey.

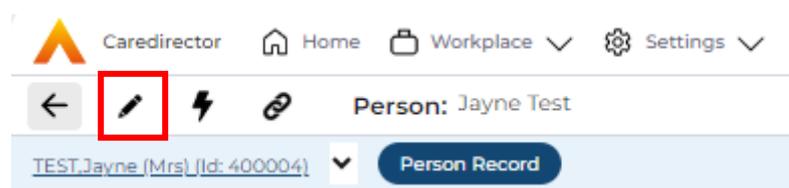
It is important to note that anyone has the legal right to change their gender through the Gender Recognition Act. Additionally, 'gender reassignment' is a protected characteristic under the Equality Act (2010).

Practitioners must engage in discussions with individuals regarding how we store their gender identity and pronouns in our social care records system, emphasising the importance of preserving this history. While some individuals may be satisfied with changing their details within their existing record, recognizing that past information and forms will retain their previous identity, others may prefer a new record as they embark on their new life and identity.

How to change a name

If a person has a CareDirector record and requests their name to be changed:

1. Go to the **Person** record and click **Edit**



2. Remove the current name detail and type in the new name

Personal Details

Id *

400004

Title

Mrs

First Name

Jayne

Middle Name

Michelle

Last Name *

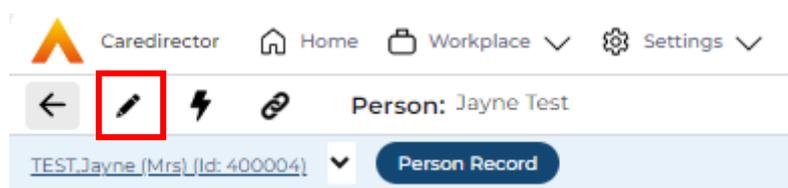
Test

3. Click **Save**. The new name will now appear on this person's records across CareDirector.
4. A history of previous names for this record can be found via the **Person > Menu > Other Information > Name History**.

How to change Stated Gender

If a person has a CareDirector record and requests their stated gender to be changed:

1. Go to the **Person** record and click **Edit**



2. Choose the person’s gender from the drop down menu.

Stated Gender *

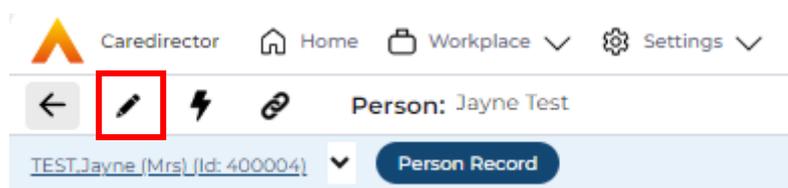
3. Click **Save**. This gender will now appear on this person’s records across CareDirector.
4. It is also possible to update this field: Gender Same as Birth Gender. This includes options for not stated/no response.

Gender Same as Birth Gender

How to change Preferred Pronouns

If a person has a CareDirector record and requests their preferred pronouns to be changed:

1. Go to the **Person** record and click **Edit**



2. Scroll down to the Additional Information section and choose the person's preferred pronouns from the drop down menu. If there is no suitable option, please contact the Systems Support Team for one to be added.

Pronouns

xQ

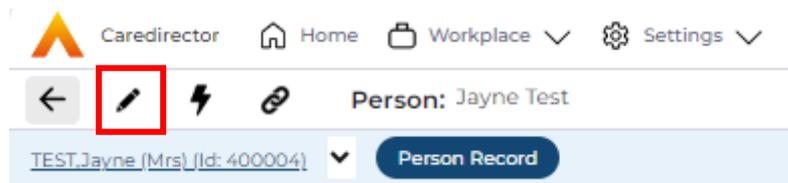
3. Click **Save**. The preferred pronouns will now appear on the blue Person banner.



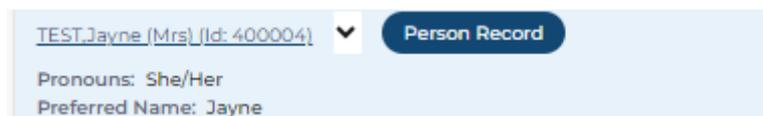
How to change Preferred Name

If a person likes to be called by a nickname/short name which is different from their name on CareDirector (e.g. Bill for William), then the Preferred Name field is useful to record that.

1. Go to the **Person** record and click **Edit**



2. Scroll down to the Communication Preferences section and type in the name.
3. Click **Save**. The preferred name will now show on the blue person banner.



Adding an Alias

If a person likes to be called by a nickname/short name which is different from their name on CareDirector (e.g. Bill for William), or is known by different names to different people/organisations, then the Alias section is useful for recording that.

1. Go to the **Person > Menu > Other Information > Aliases**
2. Click the plus icon 
3. Enter the required details. Responsible Team will default to your team.

General

| | | | | | | | |
|-------------|---|----------------------------------|----------------------------------|--------------------|---|----------------------------------|----------------------------------|
| Person * | <input type="text" value="Jayne Test"/> | <input type="button" value="x"/> | <input type="button" value="Q"/> | Responsible Team * | <input type="text" value="CD V6 Team"/> | <input type="button" value="x"/> | <input type="button" value="Q"/> |
| First Name | <input type="text"/> | | | Middle Name | <input type="text"/> | | |
| Last Name * | <input type="text"/> | | | | | | |

4. Click **Save**.
5. When searching for any of the person's aliases, their record will now appear in search results.

Merging records

If a person is found to have more than one CareDirector person record in different names, then these can, with their permission, be merged into one record to ensure that their information is all accessible in one place.

The person's consent to merge their records should be gained and recorded on a task.

Please contact the Systems Support Team via [eforms](#) to request the records to be merged. The "master" record will then be the main record and the "subordinate" record(s) will no longer appear in search results.

Old cases, forms, attachments and activities etc. from the subordinate record(s) will now be found on the main record but with the original name(s). Therefore users must take care when copying/cloning any information, to check that the correct name/pronouns are used.

Version Control

| Version | Change | Author | Date |
|---------|---------------|--------|----------|
| V1.0 | INITIAL START | SCJ | 6/2/2024 |
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