



Inclusive Data Management in Pharmacy

If a client has completed their legal name and/or gender marker change (as well as their health card number) on their provincial public health card, it is **not necessary** to ask for and document the name change and/or gender marker certificate. The provincial public health insurance has already done their verifications. You can simply change the name and/or gender marker and/or health card number (if changed) in your pharmacy software for the insurance claims.

“

Changing legal documents is a long, arduous and costly process for many trans people. Let's support their access to important health services by minimizing administrative barriers.

”

Documentation of Chosen Name in Pharmacy Software

Did you know that . . . ?

If a person has started their social transition but hasn't changed their legal name, **there is no legal obligation to use their deadname** (name assigned at birth) for communications at the pharmacy or for consultations. On the contrary, to respect the trans person and their transition journey, as well as to establish a respectful and professional relationship, it is crucial to address the person as they wish, in accordance with their gender identity.

How to update a patient file for someone who hasn't changed their legal name and gender marker.*

Different software will have different layouts and boxes for first and last names (e.g., married name, last name, maiden name, husband's name).** Some software include the option of a second first name, or of a preferred name. Unfortunately, if used, the second/preferred name will not show on labels or billing. In this case, it is best to add the chosen name as follows or in the box for maiden name.

It is **not necessary to use the complete deadname** for submitting insurance claims. Simply insert the first letter of the legal first name and write the chosen name in the additional name box (e.g., "husband's name" box or equivalent) or after the first letter of the first name in your software (see examples below). You can test the different name boxes in your software to determine what works best for your pharmacy, to make sure that only the chosen name displays in full on receipts and labels.



* Note that not every trans or gender-diverse patient will want to change their name or pronouns.

** CPhA is aware of the outdated use of phrasing in pharmacy data software.



Inclusive Data Management in Pharmacy

BEFORE

John Smith	Health Card: SMIJ95100911	Pick up reminders:
Male	Allergies: Penicillin	Refill reminders:
T: (613) 555-5555		Last Rx: April 25, 2025
Language preference: English	PHN:	

Last name	<input type="text" value="Smith"/>	D.O.B.	<input type="text" value="1995/10/9"/>	Height	<input type="text" value="5' 9'"/>
First name	<input type="text" value="John"/>	Gender	<input type="text" value="Male"/>	Weight	<input type="text" value="143"/>
Middle name	<input type="text"/>	Title	<input type="text"/>	Status	<input type="text"/>

Home address

City Province Postal code



In some provinces, it is possible to override a mismatch between the legal name and the name entered in the pharmacy software with a specific code.

AFTER

J Florence Smith	Health Card: SMIJ95100911	Pick up reminders:
Male	Allergies: Penicillin	Refill reminders:
T: (613) 555-5555		Last Rx: April 25, 2025
Language preference: English	PHN:	

Last name	<input type="text" value="Smith"/>	D.O.B.	<input type="text" value="1995/10/9"/>	Height	<input type="text" value="5' 9'"/>
First name	<input type="text" value="J Florence"/>	Gender	<input type="text" value="Male"/>	Weight	<input type="text" value="143"/>
Middle name	<input type="text"/>	Title	<input type="text"/>	Status	<input type="text"/>


Home address

City Province Postal code

The name now appears as **SMITH, J FLORENCE**. Only the first letter of the first name assigned at birth appears (J). This is necessary for insurance claims (so the health card number doesn't change automatically).

Please note that, although it would be ideal to change the gender marker in this example to "female," this is not always possible because it could change the health card number, which is needed for the insurance claims. You may test it in your software.

The label will look like this:

Best Pharmacy (416) 555-0000
 124 Queen Street, Toronto, ON J0X 1M0
Rx: 15512 Smith, J Florence 
 Dr. Hansen, Frank TP 30-May-2026
 30 CAP Apo-lansoprazole 30 mg
 Lansoprazole 30 mg
 DIN: 02293838 Mfr: APX Refills: 1
TAKE 1 CAPSULE DAILY FOR 30 DAYS
 All refills expire: 30-June-2026

This procedure ensures that the staff calling the patient will use the chosen name only ("Florence"), as there is no other name visible.



Support trans and gender-diverse clients so that their chosen name appears in pharmacy software, on labels and on receipts.



Do not: Insist that the legal name must be used in pharmacy software.



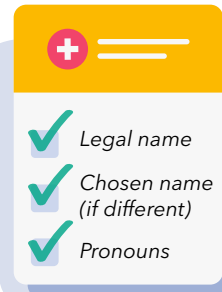
Inclusive Data Management in Pharmacy

Documentation of Pronouns in Pharmacy Software

Proactively ask upon receiving a prescription for gender-affirming medications if the patient would like to change the name and pronouns pharmacy staff use for them. Document that information clearly and objectively.



Implement inclusive intake forms.



Hi,
 My name is Sarah and I am the pharmacist on duty. You brought in a new prescription for testosterone. Do you have some time so we can discuss it?
 Would you prefer to receive counselling in the private consultation area?
 Can you explain the reason you were prescribed this medication?
 To better support you here at the pharmacy, I would like to mention that it is possible for us to change your name or pronouns in your file, even before a legal change has been made. Is that something you would like to update today?*

If the version of the software you are using supports this feature, document pronouns in the field specifically designated for this purpose.



Document pronouns:

- "Patient uses pronouns she, her"
- "Uses they/them pronouns"
- "Please alternate she/he pronouns"
- "Pronoun he."

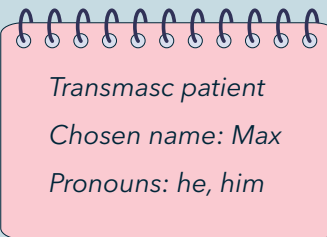


Do not write:

- "Client wants us to call him ma'am."

Age	29 years	▼
Language	English	▼
Sex	Female	▼
Gender		▼
Pronouns		▼
<ul style="list-style-type: none"> co/co/cos en/en/ens ey/em/eir he/him/his she/her/hers they/them/their ve/vis/ver xie/hir/hir yo/yo/yos ze/zir/zir 		

Example: Notes in file.



* Note that not every trans or gender-diverse patient will want to change their name or pronouns.



Inclusive Data Management in Pharmacy



Documentation of the Transition of a Trans or Gender-Diverse Client in Pharmacy Software



To learn more about the vocabulary specific to 2SLGBTQI+ populations, read www.pharmacists.ca/cpha-ca/assets/File/education-practice-resources/SmashingStigma_languageguide.pdf.



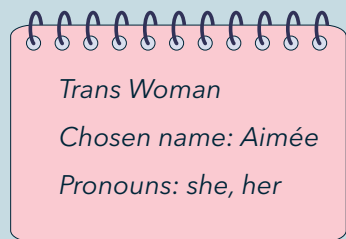
Write: "Patient is a trans woman" "Trans man" "Nonbinary person" "Transgender patient" "Gender transition" "Trans person."

See if there's a possibility to add the information as a "medical condition" (in the same way as pregnancy, breastfeeding, etc.): transgender or an equivalent phrasing, depending on the software.



Do not write: "Patient is becoming a woman" "Patient is becoming a man" "Gender transformation" "man → woman" "woman → man."

Example: Notes in file.



If the version of the software you are using supports this feature, document gender in the field specifically designated for this purpose.

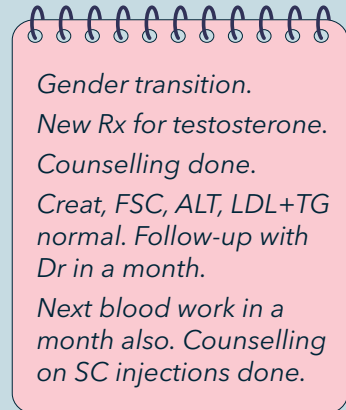
Language: English (dropdown)
Sex: Female (dropdown)
Gender: [dropdown menu with options: Cisgender, Female, Male, Nonbinary, Prefer not to say, Trans Man, Trans Woman, Two-Spirit]
Pronouns: [input field]

Some software has the option to select "N.I." (as in "not indicated," or not applicable, or other) in the sex box. Unfortunately, billing to provincial health insurance may require that the health number and sex in the software match.

We recommend trying regularly, especially for privately insured clients, to see if the option "N.I." allows for billing to insurance.

Example:

Note in the prescription, clinical note.



Some provincial public health insurance and many pharmacy software currently do not allow changing the gender marker to "X" (i.e., nonbinary, agender). It is especially important in this case to document the gender identity along with pronouns in the file to avoid misgendering patients.



Inclusive Data Management in Pharmacy

Respecting a Patient's Name and Pronouns and Treating Any Information About Gender Transition with Respect and Discretion



Confirm that all necessary information is present in the file and use this information respectfully.



Do not: Comment in a negative way on someone's chosen name among coworkers (e.g., "this is a really weird name" "What are they?! A man or a woman?!" "They don't seem to know what they want.") Besides being disrespectful, know that everything can be heard from the waiting area.

Do not: Ask irrelevant questions about the transition (e.g., about history of surgeries if there is no link to the care you are providing). If asking about surgeries or anatomy impacts your clinical decision-making, do so respectfully. This might happen in consultations about uncomplicated urinary tract infections or vaginal yeast infections but is out of line when counselling on hypertension medication, for instance.

Example: Notes in file.

Trans man. Uncomplicated urinary tract infection.
Sx: pollakiuria, painful passing of urine since this morning. Absence of red flags (no fever, no back pain, no surgical change to urinary tract). Nitrofurantoin BID last September. Well tolerated and efficacious. Will prescribe idem.*

YZ #12345 PH

Did you know that . . . ?

In order to bill provincial public health insurance for the professional consultation/assessment needed to prescribe gendered medications (such as contraception, emergency contraception, medications for vaginal yeast infection or uncomplicated urinary tract infection) to a transmasculine or nonbinary patient assigned female at birth with a health card (number) indicating "male," you may need to temporarily change the sex to "female," save the change and claim the consultation. Thereafter, you will have to undo the change. It is a purely administrative procedure to claim a consultation until provincial health insurance authorizes claiming these consultations for transmasculine and nonbinary patients assigned female at birth with a health card (number) indicating "male." You may want to test this as it might not be necessary in all provinces and territories.



*Considering that the anatomy of the urinary tract of the client compares best to the one of a cis woman.



Inclusive Data Management in Pharmacy

Practical Tips for Every Employee at the Pharmacy



Use neutral, polite greetings to welcome someone at the cash or intake, e.g., "Hello, how can I help you?" If you inadvertently misgender someone, apologize honestly, make up for your mistake and move on, e.g., "Good morning, ma'am . . . Oh, I am sorry. Good morning Skylar, I will put a clearer note in your file, so we are not misgendering you again in the future and that we are addressing you in the correct way. Again, I apologize. Now, with regards to your prescription, . . ."



Do not: Use gendered greetings, e.g., "Good afternoon, ma'am!" "Have a good day, sir!"



In some jurisdictions, any type of needle or syringe used to administer injectable medications (e.g., testosterone SC or IM; estradiol IM) can be prescribed by pharmacists and billed to insurance. You can find information on hormone injection supplies in Trans Care BC's [Hormone Injection Supplies Toolkit](#).

If the client has a personal preference for a particular type of needle or syringe, it is important to respect their choice.



“

It is best to **trust** a person who shares information about their transition with you. People typically do not lie about being trans to gain access to certain medications or services; on the contrary, coming out as trans in health-care settings carries many risks and exposes people to potential discrimination. As a rule, believe what trans people tell you about their bodies and experiences.

”

Financial contribution: