

Documentation Matters: Tip #14

Can I use a client's preferred name in the social work record?

Social work records must contain the client's name (NLCSW, 2020, Standards of Practice). While the use of the client's legal name is recommended, there may be times when clients request to have their preferred name used in their record. In these instances, social workers consider the following:

- Professional responsibility – social workers have an ethical, and legal, responsibility to accurately document client information. Client records must correctly identify the person who is receiving services. When creating a client record, using the person's legal name is important in verifying the client's identity.
- Respect for the inherent dignity and worth of all persons – social workers embrace diversity and inclusion through their practices and take reasonable steps to ensure that the client's preferences and needs are appropriately supported. This would include referring to clients by their preferred name when providing services and encouraging others in the workplace who have interactions with the client to also use their preferred name.
- Client self-determination & informed consent- social workers provide clients with information pertaining to their documentation practices. When using a client's preferred name in a record, social workers document the request and make a note to link the client's legal name to their preferred name (e.g., Client is John Smith, and prefers the name Jane Smith). In progress notes, the client's preferred name may be used once this linkage is made in the record.
- Communication with professionals/collateral contacts/insurance companies – written correspondence related to service delivery should include the client's legal name with their preferred name stated where appropriate.
- Policy and Legislation – it is important that social workers seek consultation on agency policy and legislative requirements pertaining to documentation and use of preferred name.
- Legal name change – when a client legally changes their name, client records should be updated, with appropriate documentation, to reflect the name change and ensure continuity of care.

For more information related to social work documentation, visit the NLCSW website www.nlcsw.ca.