Patient Name
Input and Display

Quick Implementation Guide

Edition 1
22nd April 2010

Version History **to be deleted in the final version**

0.0.1.1	18-May-2010	Updated diagrams for optimal character lengths

Contents

This document was prepared for NHS Connecting for Health which ceased to exist on 31 March 2013. It may contain references to organisations, projects and other initiatives which also no longer exist. If you have any questions relating to any such references, or to any other aspect of the content, please contact cuistakeholder.mailbox@hscic.gov.uk

Introduction

The unambiguous recording and reading of patient names is vital for patient safety and application usability. Confusion is likely to lead to delays in identification (or, even worse, cause misidentification) of patients and their associated items, such as records and letters.

Therefore, a consistent and clear format for the input and display of patient names is a key component of an effective health care system.

Important

Although it contains all of the guidance points, this document omits supporting information and is therefore not intended as a substitute for the full NHS CUI document *Patient Name Input and Display*[1]. Refer to that document for the definitive statement of the design guidance in this area.

The visual representations used to display the guidance are illustrative only. Stylistic choices (for example, display font used), unless otherwise specified, are not part of the guidance and are therefore not mandatory requirements.

[1] Patient Name Input and Display – User Interface Design Guidance (v3.0.0.0)

Patient Name Display

This document refers to Patient Name elements using the descriptors 'Family Name' and 'Given Name'. This includes the labels used within the visual representations. However, use of these terms is not Mandatory but only Recommended (see Instructional Text section). An example of alternative terms would be 'Last Name' and 'First Name'.

Family Name

Given Name

SMITH, John (Mr)

Title
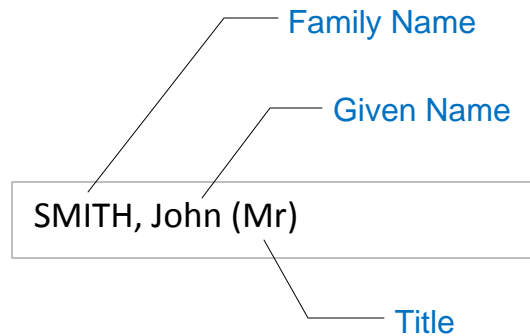
NID-0001

SMITH, John (Mr)

The display must present the Family Name in all uppercase letters to clearly distinguish it from the Given Name
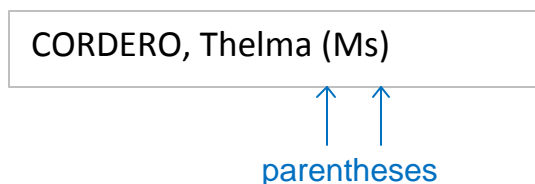
Mandatory

NID-0002

COOPER, Catherine (Dr)

comma

The display must separate the Family Name and Given Name using a comma to further establish that the Family Name is being placed first
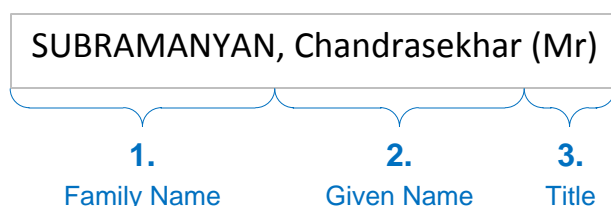
Mandatory

Patient Name Display

CORDERO, Thelma (Ms)

↑ ↑
parentheses

NID-0003

The display must include parentheses around the Title to separate and distinguish it from the other name elements

Mandatory

NID-0008

The display must present a single pair of parentheses around the Title element, for example, (Mr)

Mandatory

SUBRAMANYAN, Chandrasekhar (Mr)

1. **2.** **3.**
Family Name | Given Name | Title

NID-0004

The display must present the name elements strictly in the order shown

Mandatory

SMITH, John (Mr)
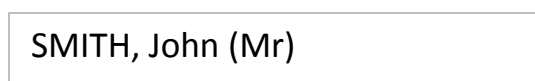
NID-0005

The display must present all data for each specified element (Family Name, Given Name and Title) of the Patient Name in full. Avoid truncation of information where possible

Mandatory

JOHNSON, Brian (Mr)

↑
space

NID-0006

The display must separate the presentation of Given Name and Title by a single space

Mandatory

Patient Name Display

5

JOHNSON, Brian (Mr)
COOPER, Catherine (Dr)
EVANS WEST, Jonathan (Sir)

NID-0007

The display must present the Title element in title case, for example, Sir not SIR, Mr not MR

Mandatory

JOHNSON, Brian (Mr)

⏜

Up to 35 characters

NID-0009

The display must allow any free-text (up to 35 characters) to be presented in the Title element

Mandatory

NID-0011

The display must allow the Family Name, Given Name and Title elements to present at least the maximum field sizes given in the NHS Connecting for Health Personal Demographics Service (PDS) FS 10.00, Issue 1A, 18th January 2005 (CDT D 0222).

Mandatory

JOHNSON, Brian (Mr)

↑

full stop omitted

NID-0010

The display must, in accordance with the UK Government Data Standards Catalogue guidelines, omit a trailing full stop from the Title element (for example, 'Mr' not 'Mr.')

Mandatory

Patient Name Display

EVANS WEST, Jonathan (Sir)

A Family Name with
two components

SMITH, Mary Jane (Mrs)

A Given Name with
two components

SMITH, Mary Jane (Mrs)

↑
Uppercase

EVANS WEST, Jonathan (Sir)

OR

EVANS-WEST, Jonathan (Sir)

SMITH, Nadejda (Mrs)

↑
Title case

SMITH, Nis Bank (Mr)

SMITH, Anne-Jorun (Mrs)

NID-0012

The display must allow for the Family Name and Given Name elements to consist of multiple components. Components are constituent parts of the name element that combine with other parts to form the element as a whole

Components have the following features:

Family Name components must consist of UPPERCASE alphabetic characters only, for example, SMITH

Multiple Family Name components must be separated by a hyphen or a single space

Given Name components must display in title case, for example, Nadejda

Multiple Given Name components must be separated by a hyphen or a single space.

Mandatory

Patient Name Display

Patient Name Display

SUBRAMANYAN,
Chandrasekhar (Mr)

NID-0013

The display should allow word wrapping to occur in instances where the field length exceeds the width allocated to it on the form. If word wrapping occurs, it should be applied only at the end of a whole field element or at the end of a field element component, if it comprises multiple parts (for example, Middle name(s) field)

Recommended

Patient Name Input

Title	e.g. Mr ▼
FAMILY name	e.g. SMITH
Given name	e.g. John
Middle name(s)	e.g. David James
Suffix	e.g. Junior
Known as	e.g. Johnny-Boy

NID-0062

By default, include a prompt in the input boxes to indicate to a user the information required

Recommended

NID-0063

Present the default prompt in an occluded form to prevent confusion with actual data input by a user

Recommended

1. e.g. John
2. |
3. Jos|

NID-0064

Remove the default prompt when a user begins to input data

Mandatory

Patient Name Input

Fields

A Patient Name input control can consist of up to six constituent fields with labels: Title, Family Name, Given Name, Middle name, Suffix and Known As

Title
Family Name
Given Name

These are considered to be the minimum data required to make the name useful

Middle Name
Suffix
Preferred Name

These are considered to improve data quality but are not mandatory
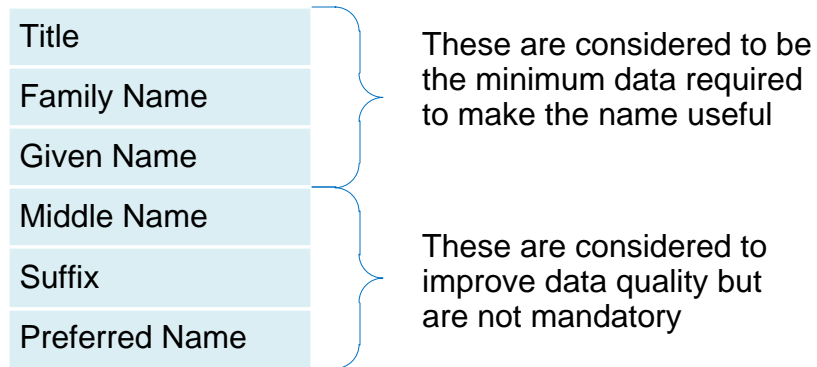
Patient Name Input

Fields - Title

Mr	Sir
Mrs	Lady
Ms	Lord
Dr	Dame
Rev	Other...

NID-0016

This table shows suggested values for 'Title'

Recommended

Title

Mr
Mrs
Ms
Dr
Rev
Sir
Lady
Lord
Dame
Other...

NID-0017

One value should allow the user to invoke free-text input mode (for example 'Other...' in the illustrations)

Recommended

Title   *e.g. Mr*

NID-0018

Input box for Title should contain a relevant prompt, for example, Mr

Recommended

NID-0019

Input box for Title should be in the form of a drop-down combo-box

Recommended

Patient Name Input

Fields - Title

Title [e.g. Mr ▼]

Up to 35 characters
input
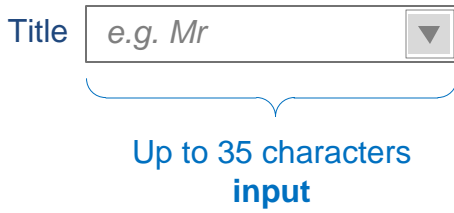
NID-0014

The Title input control must allow a maximum of 35 characters

Mandatory

Title [Mr ▼]

At least four characters
displayed
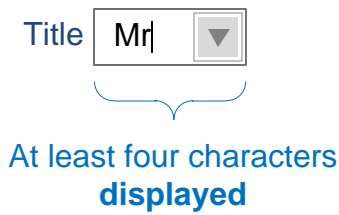
NID-0015

Minimum visual width of the input box must display four characters

Mandatory

Patient Name Input

Fields - Family Name

FAMILY name | *e.g. SMITH*

NID-0020

Family Name input must be via a free-text entry box

Mandatory

NID-0024

Family Name input box should contain a relevant prompt in its default state (for example, 'e.g. SMITH') in occluded form

Recommended

FAMILY name | *e.g. SMITH*

Up to 40 characters **input**

NID-0021

Family Name input box must accept a maximum of 40 characters

Mandatory

FAMILY name | winstan

At least eight characters **displayed**

NID-0022

Family Name input box should be capable of displaying a minimum of eight characters without occlusion

Recommended

FAMILY name | winstan

Optimally 14 characters **displayed**

NID-0023

Family Name input box should optimally display 14 characters without occlusion

Recommended

Patient Name Input

Fields - Family Name

FAMILY name | WINSTANLEY

When displaying a Family Name value, the characters should all be in uppercase

Recommended

Patient Name Input

Patient Name Input

Fields - Given Name

Given Name [*e.g. John*]

NID-0026

Given Name input must be via a free-text entry box

Mandatory

NID-0030

Given Name input box should contain a relevant prompt in its default state (for example, 'e.g. John') in occluded form

Recommended

Given Name [*e.g. John*]

Up to 35 characters **input**

NID-0027

Given Name input box must accept a maximum of 35 characters

Mandatory

Given Name [jonathan]

At least eight characters **displayed**

NID-0028

Given Name input box should be capable of displaying a minimum of eight characters without occlusion

Recommended

Given Name [jonathan]

Optimally 14 characters **displayed**

NID-0029

Given Name input box should optimally display 14 characters without occlusion

Recommended

Given Name [Jonathan]

NID-0031

When displaying a Given Name value the first character should be in uppercase

Recommended

Patient Name Input

Fields - Middle Name(s)

Middle name(s) [*e.g. David James*]	NID-0032 Middle name input must be via a free-text entry box **Mandatory**
	NID-0036 Middle name input box should contain a relevant prompt in its default state, (for example, 'e.g. David James') in occluded form *Recommended*
Middle name(s) [*e.g. David James*] Up to 100 characters **input**	NID-0033 Middle name input box must accept a maximum of 100 characters **Mandatory**
Middle name(s) [david ja|] At least eight characters **displayed**	NID-0034 Middle name input box should be capable of displaying a minimum of eight characters without occlusion *Recommended*
Middle name(s) [david j|] Optimally 7 characters **displayed**	NID-0035 Middle name input box should optimally display 7 characters without occlusion *Recommended*

Patient Name Input

Fields - Suffix

Suffix [*e.g. Junior*]

NID-0037

Suffix input must be via a free-text entry box

Mandatory

NID-0041

Suffix input box should contain a relevant prompt when in its default state (for example, 'e.g. Junior') in occluded form

Recommended

Suffix [*e.g. Junior*]

Up to 35 characters **input**

NID-0038

Suffix input must accept a maximum of 35 characters

Mandatory

Suffix [junior|]

At least eight characters **displayed**

NID-0039

Suffix input box should be capable of displaying a minimum of eight characters without occlusion

Recommended

Suffix [junior|⌷⌷⌷⌷⌷⌷⌷]

Optimally 14 characters **displayed**

NID-0040

Suffix input box should optimally display 14 characters without occlusion

Recommended

Patient Name Input

Fields – Preferred Name

Known as [*e.g. Johnny-Boy*]

NID-0042

Preferred name input must be via a free-text entry box

Mandatory

NID-0046

Preferred name input box should contain a relevant prompt in its default state (for example, 'e.g. Johnny-Boy') in occluded form

Recommended

Known as [*e.g. Johnny-Boy*]

Up to 35 characters **input**

NID-0043

Preferred name input box must accept a maximum of 35 characters

Mandatory

Known as [johnn|]

At least eight characters **displayed**

NID-0044

Preferred name input box should be capable of displaying a minimum of eight characters without occlusion

Recommended

Known as [johnn|]

Optimally 14 characters **displayed**

NID-0045

Preferred name input box should optimally display 14 characters without occlusion

Recommended

Patient Name Input

Control Layout

This guidance supports two patient name input control layouts

Title	e.g. Mr ▼
FAMILY name	e.g. SMITH
Given name	e.g. John
Middle name(s)	e.g. David James
Suffix	e.g. Junior
Known as	e.g. Johnny-Boy

InForm Layout

The most desirable layout for patient safety and usability and the default for an application's Patient Name Input Control

InLine Layout

The InLine layout is included for instances where vertical space is constrained or where horizontal layout is the application's convention

Title	FAMILY name	Given name	Middle name(s)
e.g. Mr ▼	e.g. SMITH	e.g. John	e.g. David James

Suffix	Known as
e.g. Junior	e.g. Johnny-Boy

Patient Name Input

Control Layout

Title	e.g. Mr ▼
FAMILY name	e.g. SMITH
Given name	e.g. John
Middle name(s)	e.g. David James
Suffix	e.g. Junior
Known as	e.g. Johnny-Boy

NID-0047

InForm field controls must be aligned on the left edge of the input boxes

Mandatory

NID-0048

InForm field controls (where they exist) must be placed underneath each other in the order illustrated

Mandatory

Title	FAMILY name	Given name	Middle name(s)
e.g. Mr ▼	e.g. SMITH	e.g. John	e.g. David James

Suffix	Known as
e.g. Junior	e.g. Johnny-Boy

NID-0050

Correct presentation order is as illustrated

Mandatory

NID-0049

Ensure wrapping only occurs on whole fields

Mandatory

NID-0051

InLine design choice should only be used when InForm design has been considered undesirable

Recommended

Patient Name Input

Instructional Text

Title	e.g. Mr ▼
FAMILY name	e.g. SMITH
Given name	e.g. John
Middle name(s)	e.g. David James
Suffix	e.g. Junior
Known as	e.g. Johnny-Boy

NID-0052

Each field in a name input control must have an associated label

Mandatory

NID-0053

Labels must be programmatically linked to their associated input field

Mandatory

| Title |
| FAMILY name |
| Given name |
| Middle name(s) |
| Suffix |
| Known as |

NID-0054

Label values should be as illustrated

Recommended

Note 'Known as' is the label for the Preferred Name input control

Patient Name Input

Title	*e.g. Mr* ▾
FAMILY name	*e.g. SMITH*
Given name	*e.g. John*
Middle name(s)	*e.g. David James*
Suffix	*e.g. Junior*
Known as	*e.g. Johnny-Boy*

NID-0055

Each field in a name input control should have an associated prompt

Recommended

NID-0056

Prompts for Family Name should be capitalised

Recommended

NID-0057

All prompts except Family Name should have sentence style capitalisation

Recommended

NID-0058

Prompt values should be as illustrated

Recommended

NID-0059

Prompts should be lighter in weight and colour than the input text, and italicised

Recommended

Patient Name Input

Title	e.g. Mr ▾
FAMILY name	e.g. SMITH
Given name	e.g. John
Middle name(s)	e.g. David James
Suffix	e.g.
Known as	e.g. Johnny-Boy

Enter the person's Middle name(s)

NID-0060

Each field in a name input control should have instructional text (for example, a tooltip)

Recommended

Title

Select a Title from the list or simply type in a different Title

FAMILY name

Enter the person's Family Name (surname)

Given name

Enter the person's Given Name (forename or Christian name)

Middle name(s)

Enter the person's middle name(s)

Suffix

Enter the person's suffix name (e.g. 'Junior' or 'The Third')

Known as

Enter the name a person likes to referred to as

NID-0061

Tooltip values should be as illustrated

Recommended

Patient Name Input