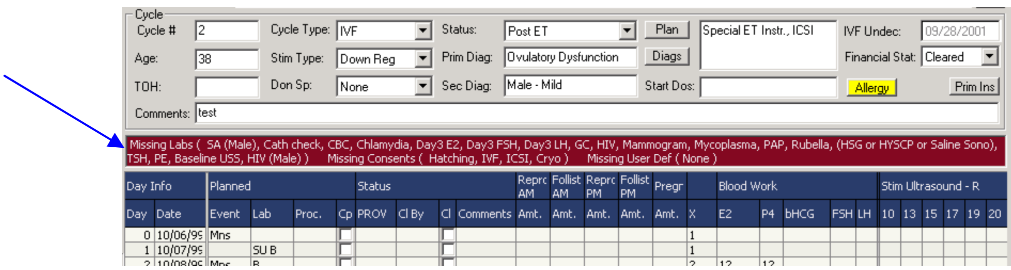
Med Software LLC
Created: 5/1/2011
Version: 1

Cycle Checklist

Admin Set Up

RESource

A cycle checklist allows you to define consents, labs and progress notes to be required based on cycle type. Each cycle type is mapped to a pre-defined checklist. When a cycle is created, the system will assign the specific checklist that corresponds to that cycle's cycle type. Checklists generally consist of items that are to be completed prior to cycle Srg (surge). As these item requirements are met they show as completed in the cycle checklist. All outstanding items remaining in a cycle's checklist will appear in the colored section directly above the stim sheet, below the cycle information.



Pre-checklist Set Up

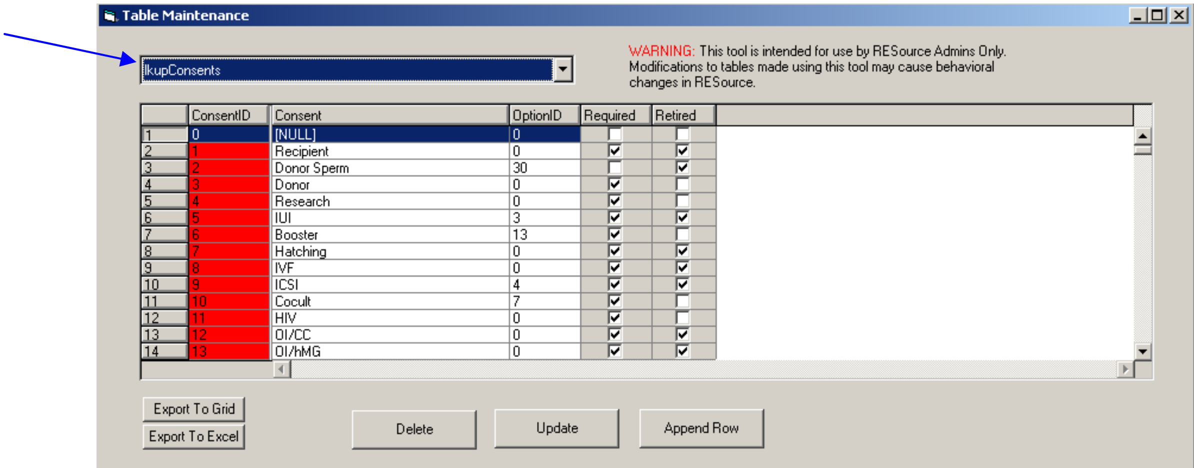
To begin building your checklist you will need to identify what items are to be required for each cycle/stim type. You will need to make sure any consents, lab items, and/or progress note (aka user-defined) items are set up in the system prior to creating the actual checklists.

Consents

To Add Consents:

1 – In the main toolbar, select Maintenance – Admin – LookUp Table Manager

2 – In the Table Maintenance form that appears select lkupConsents from the dropdown



	ConsentID	Consent	OptionID	Required	Retired
1	0	[NULL]	0		
2	1	Recipient	0	✓	✓
3	2	Donor Sperm	30		✓
4	3	Donor	0	✓	
5	4	Research	0	✓	
6	5	IUI	3	✓	✓
7	6	Booster	13	✓	
8	7	Hatching	0	✓	✓
9	8	IVF	0	✓	✓
10	9	ICSI	4	✓	✓
11	10	Cocult	7	✓	
12	11	HIV	0	✓	
13	12	OI/CC	0	✓	✓
14	13	OI/hMG	0	✓	✓

3 – Click the Append Row button. A new row will be added to the bottom of the existing list.

4 – Enter the next consecutive ConsentID (red column)

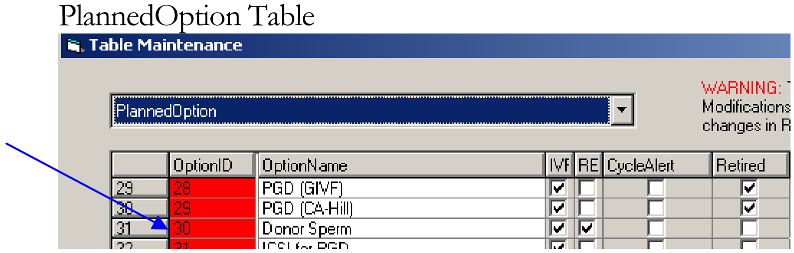
5 – Enter the name of the consent in the Consent field

6 – OptionID (optional field)

The OptionID refers to an ID in the PlannedOption table. The Planned Option table is what drives the available cycle Plan options in Cycle Details for any cycle/stim sheet. You can associate an option from the Planned Options with a consent if desired. **When applied to a checklist this consent will only appear (as a required item) if the corresponding plan item is selected in the Cycle Plan.**

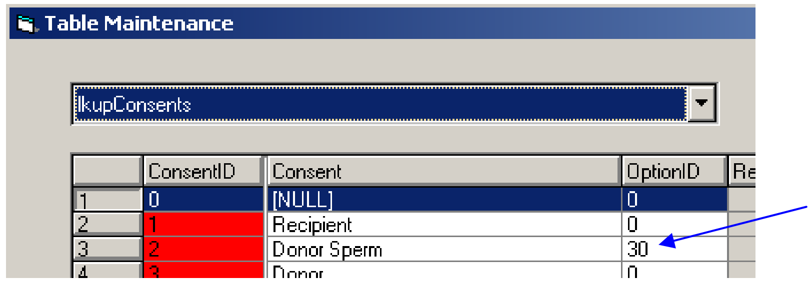
For example, if you have a Donor Sperm cycle Plan option and a Donor Sperm consent, you can associate the donor sperm OptionID from the Planned Option table with the Donor Sperm consent in the lkupConsents table. In the Planned Option Table image below, notice Donor Sperm has an OptionID of 30. In the lkupConsents table, you would enter 30 in the OptionID field for the Donor Sperm consent (the Plan option and the consent do not have to have the same name – they are associated by the ID only).

PlannedOption Table



	OptionID	OptionName	IVF	RE	CycleAlert	Retired
29	28	PGD (GIVF)	✓			✓
30	29	PGD (CA-Hill)	✓			✓
31	30	Donor Sperm	✓	✓		

lkupConsents Table



7 – Check off the Required field. If Required is not checked it can still be a checklist item but it will indicate "not required" and will not prevent the checklist from progressing through color statuses.

Note: Any consents no longer being used can be removed by checking off Retired

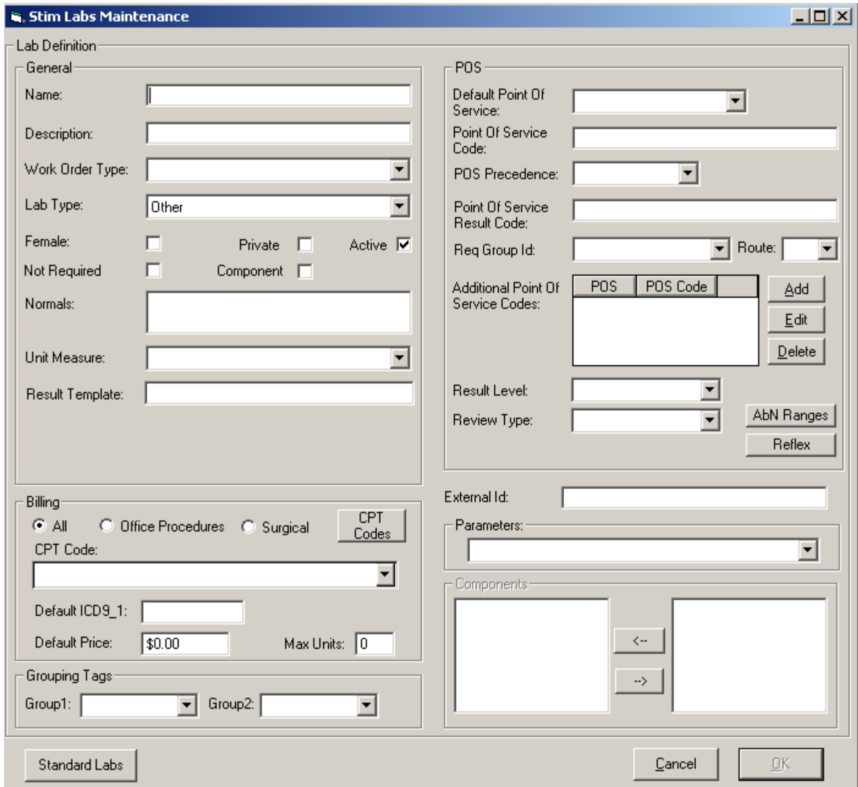
Various items in RESource can be retired. You will notice that many of the lookup tables have a Retired option. Any item that was previously used but is no longer active should be Retired. Retiring an item will remove it from anywhere a user can select it (corresponding dropdown list, etc) but will leave it associated with any patient record(s) already referencing it. You can only delete items that have never been used.

Stim Labs Maintenance

Stim Labs Maintenance is where all orderable lab items are defined. These items will be available when creating a lab order via the stim sheet and can be defined as required items in the checklist.

1 – In the main toolbar, select Maintenance – Admin – Stim Labs Maintenance

2 – In the Stim Labs Maintenance window that appears, click Add. Another window will open allowing you to create a new Lab item. Selecting an existing Lab item and clicking Edit will bring up the same window, allowing you to make changes to it.
The fields are described below. Any field with an asterisk (*) means it is one of the minimum required to create a new lab item. The others give additional functionality, but are not required fields at this stage. For more information regarding these fields please refer to the Stim Labs Maintenance (Admin Set Up) documentation.



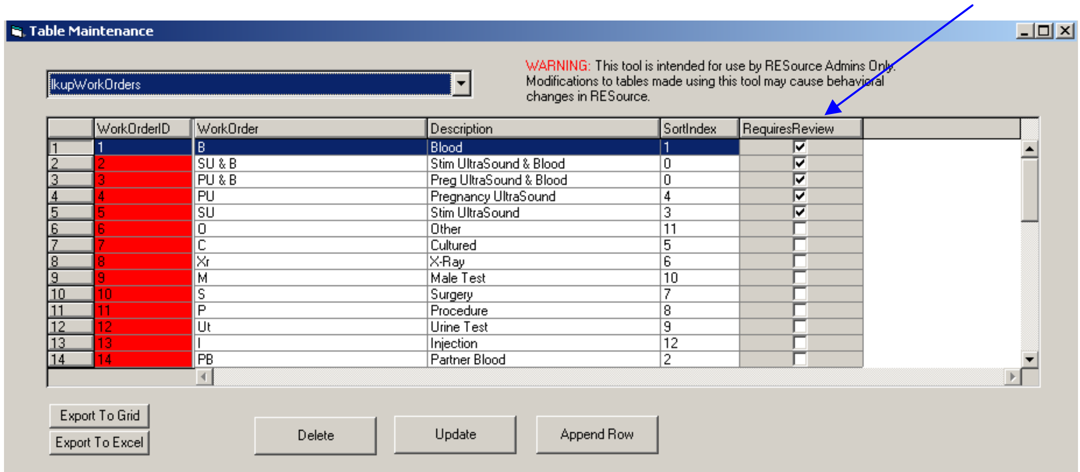
<u>General</u>

- **Name** – the name of the lab item as you want it to appear

- **Description** – a description of the lab item, or comment

- **Work Order Type** – an abbreviation representing the type of order, visible on the stim sheet. For example, B = Blood, M = Male testing, C = Culture. These work order types are customizable via the Lookup Table Manager.

- Go to the main menu and select Maintenance – Admin – Lookup Table Manager. In the Table Maintenance window that appears, choose lkupWorkOrders from the dropdown menu. All existing work order types and their description/definition will display.



	WorkOrderID	WorkOrder	Description	SortIndex	RequiresReview
1	1	B	Blood	1	☑
2	2	SU & B	Stim UltraSound & Blood	0	☑
3	3	PU & B	Preg UltraSound & Blood	0	☑
4	4	PU	Pregnancy UltraSound	4	☑
5	5	SU	Stim UltraSound	3	☑
6	6	O	Other	11	☐
7	7	C	Cultured	5	☐
8	8	Xr	X-Ray	6	☐
9	9	M	Male Test	10	☐
10	10	S	Surgery	7	☐
11	11	P	Procedure	8	☐
12	12	Ut	Urine Test	9	☐
13	13	I	Injection	12	☐
14	14	PB	Partner Blood	2	☐

You will notice a Requires Review field (blue arrow) – if checked, the given WorkOrder type will put any lab it's associated with into Daily Review. So, for example, if 'B' requires review, any patient with a lab order containing a lab whose Work Order Type field is set to 'B' will appear in Review for that day.

To add a new Work Order:
1 – When in the lkupWorkOrders table, Click Append Row
2 – Enter the next consecutive WorkOrderID (red column)
3 – Enter the WorkOrder abbreviation
4 – Enter the Description
5 – Enter the Sort Index (the list will sort by number) – you can leave it set to zero if you have no preference
6 – Check off RequiresReview if items of this type should be included in Daily Review
7 – Click Update

- **Lab Type** -

- **Female** – check off for female or patient labs (versus male or partner labs)

Although 'Female' is used to indicate a patient vs. a partner lab, you may want to consider naming your labs in RESource with "patient" and "partner" instead of "female" and "male". Using these gender-neutral terms you can apply the lab orders to same-sex couples without confusion. For example, Cystic Fibrosis (patient) and Cystic Fibrosis (partner) as opposed to Cystic Fibrosis (female) and Cystic Fibrosis (male).

- **Private** – any lab checked as Private will not appear, by default, in any printed version of the lab log/medical records ('Lab Log w/ Privacy' must be selected when printing the Lab Log as part of Medical Records in order for Private labs/results to appear)

- **Active** – if checked, the lab will appear as an orderable item in a lab order. Un-checking this field will "retire" the lab, leaving it associated with all previous patient records, but removing it from the orderable list in a lab order.

- **Not Required** – if checked, and the lab is part of a checklist, the item will not prevent the checklist from progressing to "Complete". "Not Required" will appear in parentheses after the item when it's displayed in the Outstanding items section. In most cases you will want to leave this un-checked.

- **Component** – if checked, the lab is not directly available for ordering. It can be added to another lab as a component (i.e. Venipuncture)

- **Normals** – textual description that appears in a lab order print-out, at the bottom of the lab log report and from the right click menu in the lab log

- **Unit Measure** – unit of measure for the lab item, for display purposes

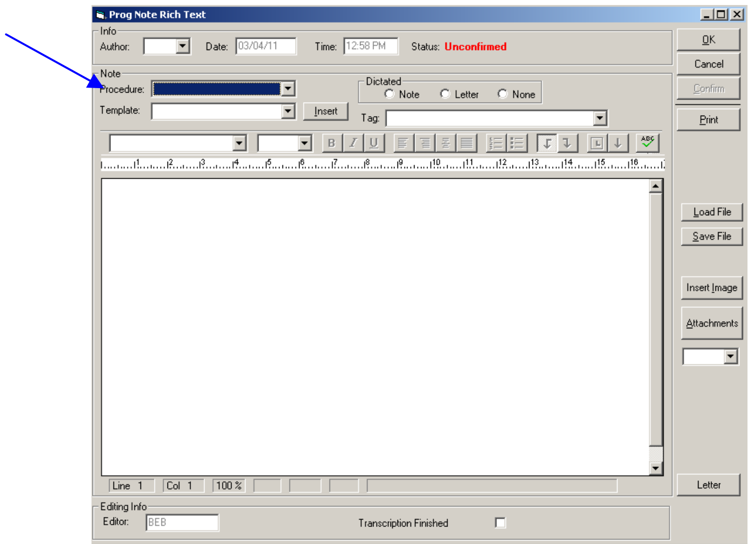
- **Result Template** – if specified, then the template will appear on the lab order report following the given lab

3 – Click **OK**

User Defined (Progress Notes)

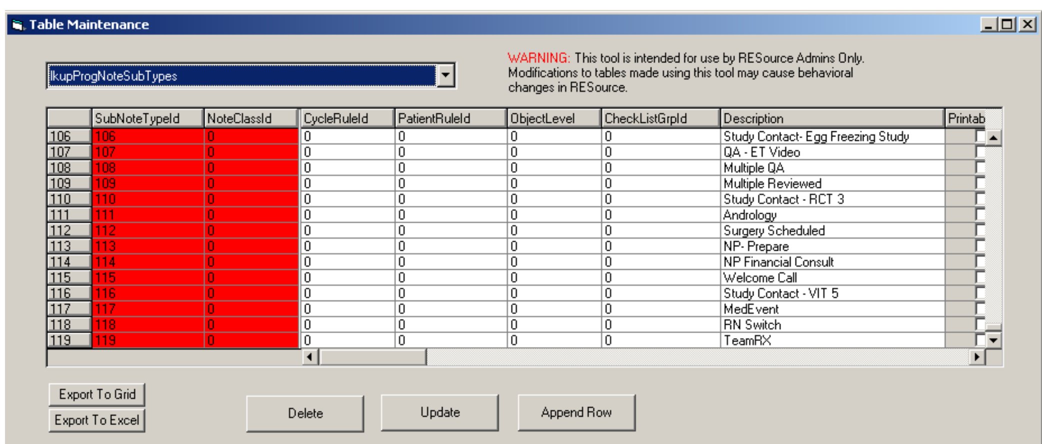
The final step in preparing for the generating of checklists is determining if you want to require any Progress Notes. Progress Notes are a way for everyone in the office to document and view notes regarding a patient's care, but you can require specific notes as part of a checklist. For example, you may want to require that the physician enter an "insemination and transfer plan" note for reference by clinical staff and the laboratory. Or maybe a medication class is required for certain cycles – a progress note could be entered to document that the patient attended and what was covered.

Progress Note Subtypes allow you to "label" a progress note. It is this Procedure label that associates the note with the checklist item. Available progress note subtypes/procedure labels are listed in the Procedure dropdown of the progress note.



To create a new Progress Note Subtype (aka Procedure):
1 – In the main toolbar, select Maintenance – Admin – Lookup Table Manager

2 – In the Table Maintenance form that appears, select lkupProgNoteSubTypes from the dropdown



3 - Click Append Row

4 – Enter the next consecutive SubNoteTypeID (red column)

- **NoteClassID** –
- **CycleRuleID** - the ID of a cycle rule associated with a stored procedure
- **PatientRuleID** -
- **ObjectLevel** -
- **CheckListGrpID** -
- **Description** – the name of the subtype/label
- **Printable** – can be used to make a note non-printable
- **DefaultSecurityLevel**

- **Required** - Check off the Required field. If Required is not checked it can still be a checklist item but it will indicate "not required" and will not prevent the checklist from progressing through color statuses.
- **Retired** – leave unchecked in order to have the subtype available for use
- **ViewLevel** -

5 – Click **Update**

Having the subtype/procedure label on the progress note is required if you want to include the note as a checklist item, but you may also want to create templates for use in these notes. Templates can include common blocks of text, can be in an outline format, and can even contain dropdown lists and date-pickers. For information on creating progress note templates, refer to the Progress Note documentation.

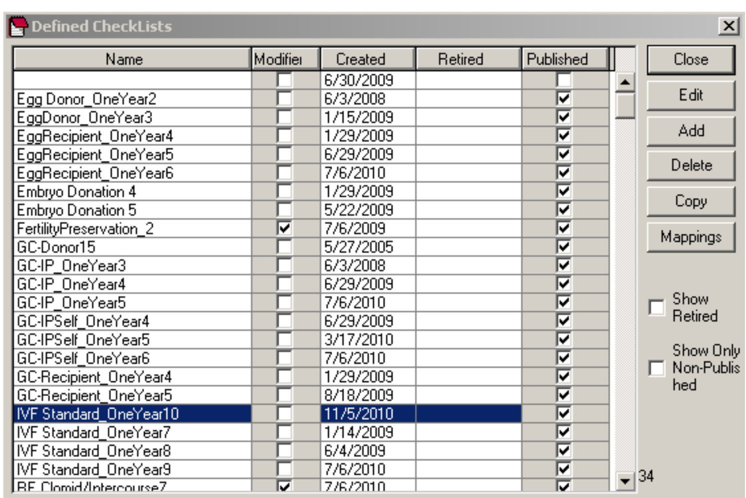
Checklist Definitions

Now that your consents, lab items and progress note items have been set up you can create your checklist(s). Checklists can be created for simply each cycle type or, with the use of checklist modifiers, multiple variations of a checklist can be created per cycle type.   In Checklist Definitions you will be able to update your current checklist and/or create new ones.

To create a New Checklist:

1 – In the main toolbar, select Maintenance – Admin – Checklist Definitions

The Defined CheckLists window will appear displaying all existing checklists. By default, retired checklists are not displayed – check off the Show Retired checkbox to view all.



2 – You have 2 options for creating a new checklist:

Create from Scratch

1 – From the Defined Checklists window, click Add

2 – Enter the name of the new checklist in the Name field at the top of the CheckList Definition window

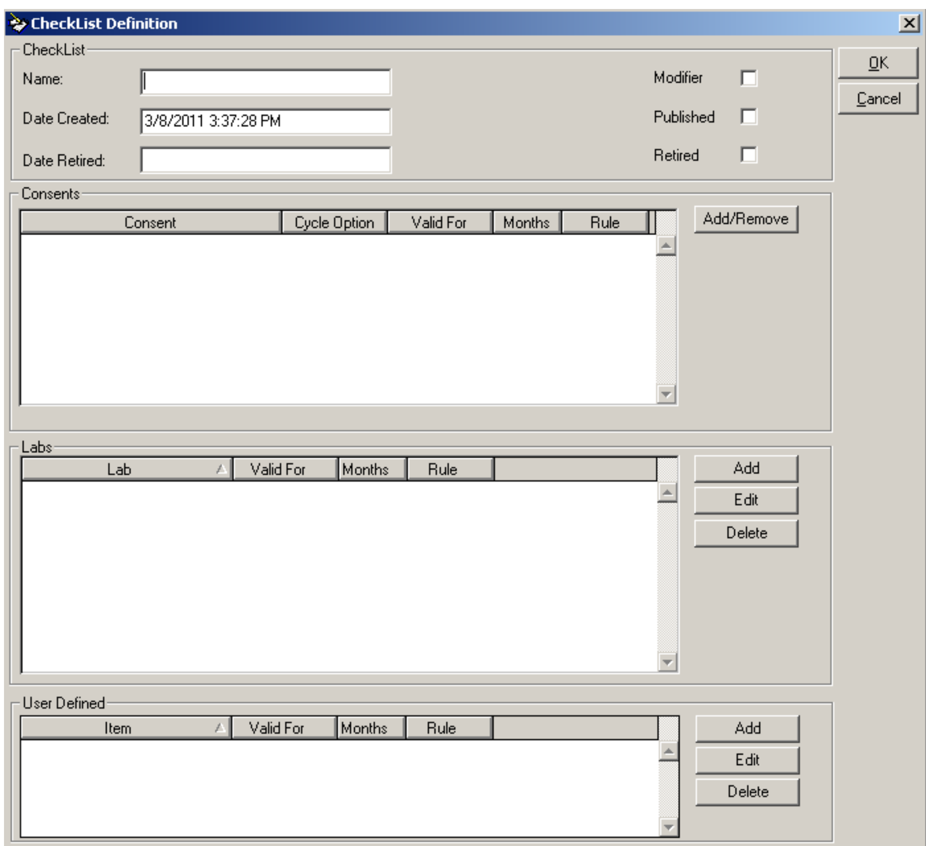
Copy an Existing

1 – Select an existing checklist that is similar to the one you want to create. Note: you can view any checklist listed by selecting it and clicking Edit.

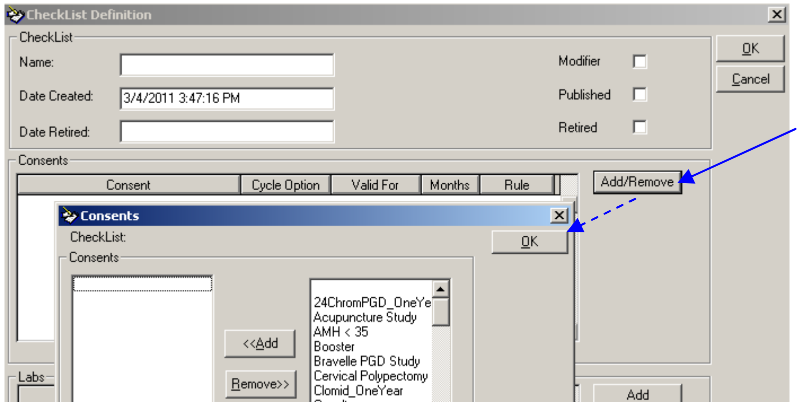
2 – Click Copy

3 – In the "Copy To" box, enter the name of the new checklist. All items from the checklist you copied will appear in the new checklist.

Use a consistent naming convention for your checklists to help keep them organized and easy to identify. You may want to include the cycle type in the name along with a number or date/year. For example, IVF_1, and if you alter/update this checklist in the future you can name it IVF_2 and so on. Keep your naming convention in mind when naming Modifiers as well.



3 – In the Consents section, click Add/Remove.

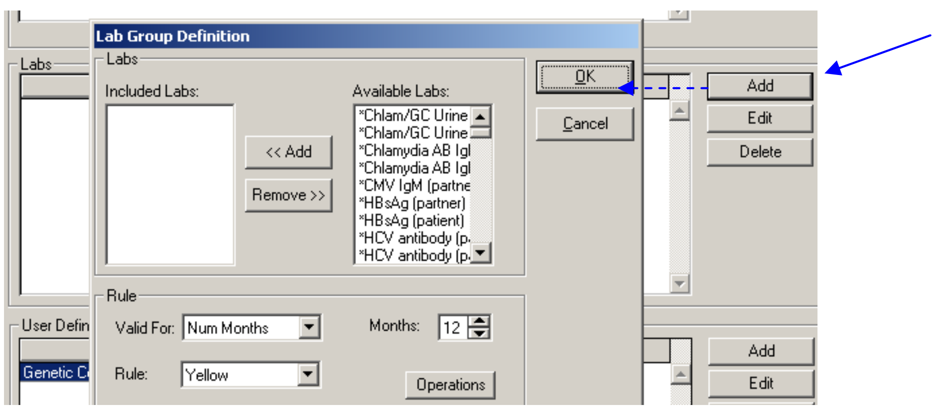


3a – The Consents window will appear with the available consents listed in the box on the right. Consents listed in the box on the left will be included in your checklist. Select a consent from the right side and click Add to move it to the left side. Repeat for each consent you need.

> **Note:** If you copied an existing checklist as a means of creating your new checklist you may need to remove some Consents from the box on the left. Select any unwanted consent(s) from the left side and click Remove.

3b – Click **OK**

4 – In the Labs section, click **Add**



4a – Select a lab from the Available Labs list and click Add to move it to the Included Labs box

4b – The Rule section of the Lab Group Definition window contains the expiration point and color rule. In the 'Valid For' dropdown, select Num Months, Per Cycle or Forever.

> **Num Months** – the number of months the lab item is good for. When selecting this option you also need to set the number of months in the Months field. In a patient record, once the requirement is met for the lab

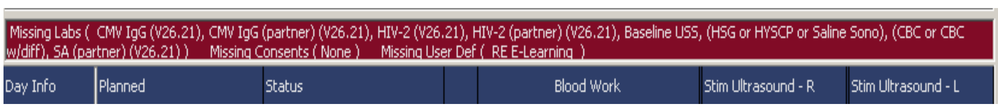
item, it will not appear as required on a checklist again until its expiration date has passed (X number of months)

Per Cycle – the lab item will be a required item every cycle

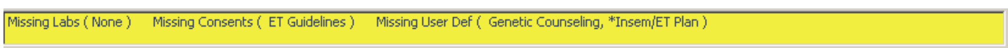
Forever – once the requirement is met for the lab item it will not appear again (no expiration date)

4c – Set the color status in the Rule dropdown – either Yellow or Green
The color status is just a visual queue. Once all yellow items have been completed the checklist background in the stim sheet will become yellow. Once all green (and yellow) items have been completed the background will become green. If all green items have been completed, but yellow items remain, the background will be red.

Red



Yellow

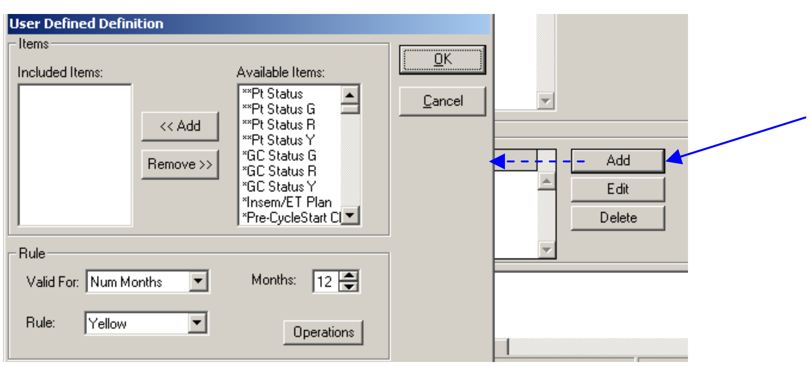


Green

With labs, you can have multiple items meet a single checklist requirement. For example, a Saline Sono and an HSG could both be part of a single requirement. When one or the other is done, both items will come out of the checklist. To create a requirement like this, simply enter both items at the same time during this step.

4d – click **OK**. Repeat step #4 for each lab to be added

5 – In the User Defined section, click **Add**



5a – Select the progress note item from the Available Items list and click Add to move it to the Included Items box

5b – The Rule section of the User Defined Definition window contains the expiration point and color rule. In the 'Valid For' dropdown, select Num Months, Per Cycle or Forever. These work the same as in the Lab section above.

5c – Set the color status in the Rule dropdown – either Yellow or Green

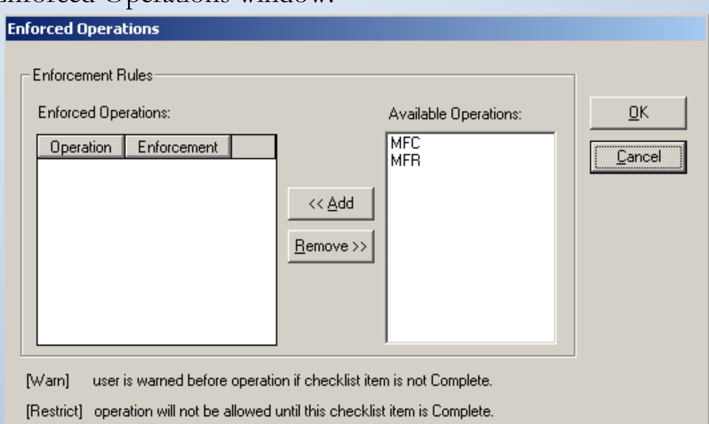
With progress note items, like with lab items, you can have multiple items meet a single checklist requirement. For example, a Genetic Counseling and a Genetic Counseling Declined could both be part of a single requirement. When one or the other is done, both items will come out of the checklist. To create a requirement like this, simply enter both items at the same time during this step.

5d – click **OK**. Repeat step #5 for each progress note item to be added

Operations

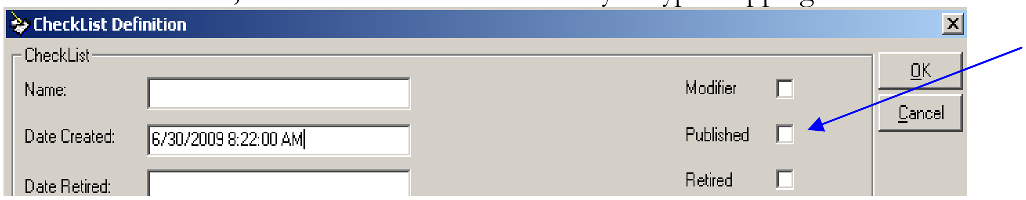
Additional checklist rules can be created an applied to a lab or progress note item. *These enforcement rules are optional* and are not required in order to define/set up your checklist. The idea behind these rules is to either warn or prevent the entry of another field if the lab item requirement has not been met. For example, you may want to warn an embryologist upon selecting MFR (Marked For Replacement/transfer) as an outcome for an embryo that a given FDA lab has not been completed.

Clicking the Operations button in either the Lab Group Definition or User Defined Definition window will display the Enforced Operations window.



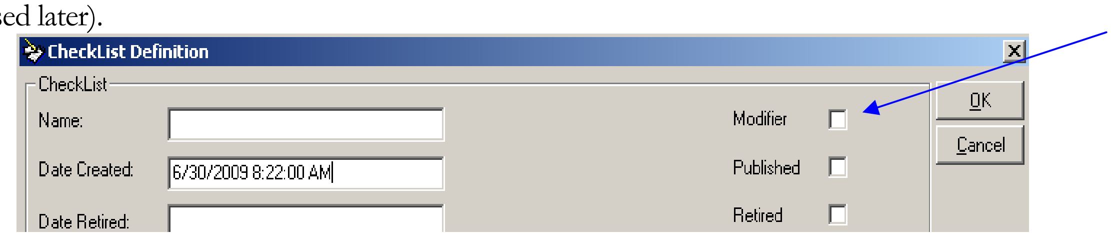
There are currently only two operations available: MFC and MFR. Selecting one and clicking Add will move it to the Enforced Operations box. Clicking on the Enforcement dropdown will display Warn and Restrict – select the enforcement and click OK. *If you are interested in more details on this feature, or are interesting in additional available operations please contact Med Software.*

6 – When you are finished creating the checklist, check off the Publish checkbox. This will lock it down so it cannot be edited, and will make it available for cycle type mapping.



Modifiers

A checklist modifier can be used to modify a checklist once it is associated with a patient's cycle. A modifier is actually created as a checklist, and it may contain just a few items or it may represent an entire checklist. For example, maybe you have a "habitual pregnancy loss" panel of labs – you wouldn't want to require all of these labs as part of a given checklist, but may want to be able to easily apply them when appropriate. You could create a checklist called Habitual Pregnancy Loss, with any consents, lab items and/or progress notes needed, the same as you would normally create a checklist, only you will check off the Modifier checkbox. You cannot map a Modifier checklist to a cycle type, but all modifiers are accessible from a patient's cycle checklist (to be discussed later).

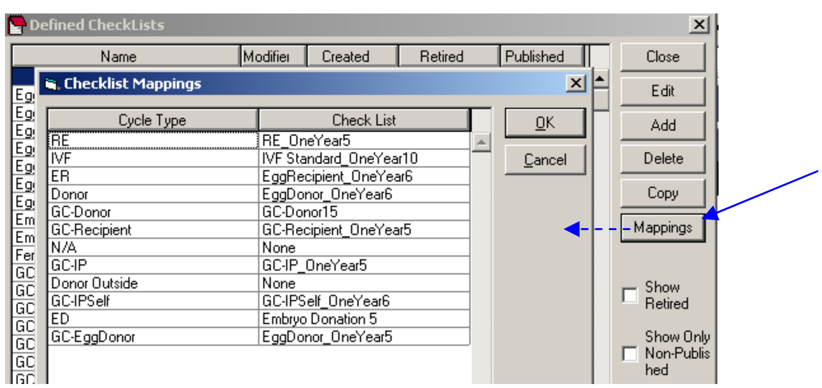


Checklist Mapping

The final step in defining your checklist is mapping it to a specific cycle type. By doing this you determine which checklist will appear as part of the stim sheet when a cycle of that type is created.

To Map the Checklist to a Cycle Type:

1 – From the Defined CheckLists window, click the Mappings button



2 – Select the Cycle Type you want to map to

3 – Click on the CheckList field adjacent to the selected cycle type. A dropdown will appear with all Published (non-Retired) checklists. Select the desired checklist from the list.

4 – Click **OK**

Note: this update will be applied to all cycles created from this point forward. Any checklists already associated with patient cycles won't be affected.