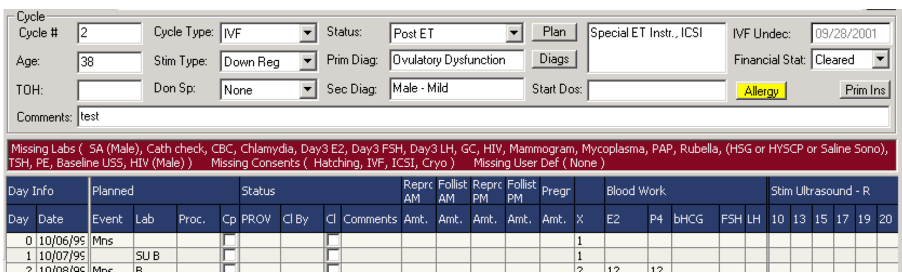
Med Software LLC Created: 5/1/2011 Version: 1 Page: 1 of 6	# Cycle Checklist User Instruction	RESource

Each cycle type is mapped to a pre-defined checklist (set up by an administrator). When a checklist is linked to a cycle, the system will assign the checklist that corresponds to that cycle's cycle type. Checklists consist of labs, consents and user-defined items to be completed prior to cycle Srg (surge). Any outstanding items remaining in the checklist will appear in the colored section directly above the stim sheet, below the cycle information.

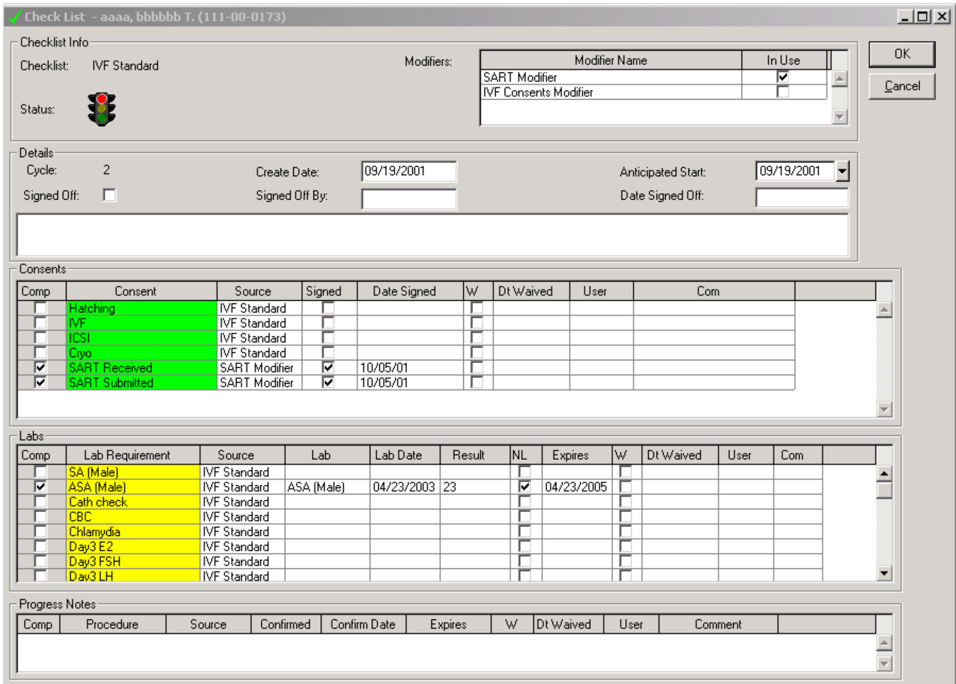


To assign a checklist to a cycle:

1 – Select the desired patient and cycle in the patient explorer

2 – Go to the Cycle option in the main menu and select Checklist or click on the shortcut icon .

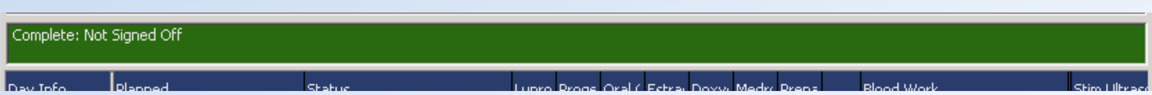
3 – The Checklist screen will appear, displaying the appropriate checklist for the cycle.

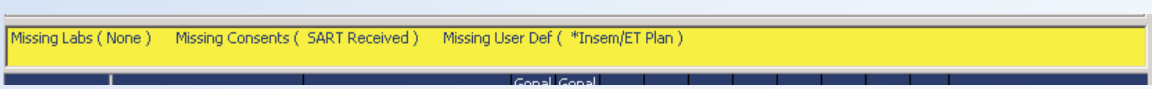


If you need to apply a Modifier to the checklist, check off the corresponding 'In Use' checkbox (Modifiers will be explained later). Click OK

4 – The checklist items will appear directly above the stim sheet, usually with a red background. Clicking on the colored area will open an expanded view of the outstanding items – to close this view, click the Close button at the bottom of the window.

When a checklist is originally created (by an administrator), each item is given a color level of either yellow or green. 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.





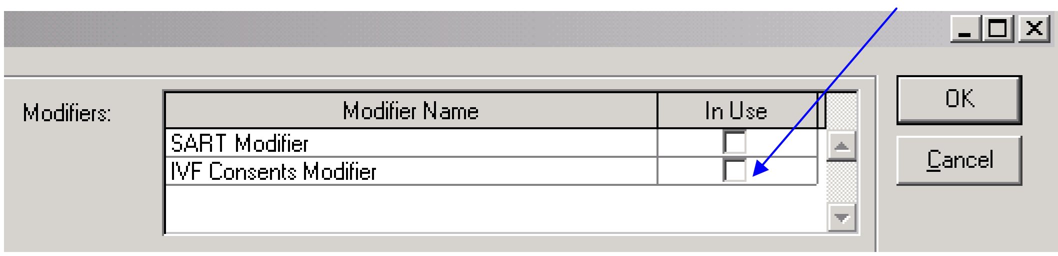
The checklist window is divided into five sections: Checklist Info, Details, Consents, Labs and Progress Notes.

Checklist Info

Checklist – indicates the specific checklist you are viewing

Status – displays the current checklist status: red, yellow or green

Modifiers
A checklist modifier is a pre-defined item that can be used to modify the current checklist. A modifier is actually created as a checklist itself, but it may only contain a few items (consents/labs/user defined) that are to be applied to an existing checklist. You could use a checklist modifier, for example, if a particular RE cycle could possibly be converted to an IVF cycle and you want to include the IVF consents in that cycle's checklist – you could create an IVF Consents modifier and then apply it to the cycle by checking off 'In Use' in the Modifiers section.



Details

Cycle – the corresponding cycle number

Create Date – the date the checklist was assigned/linked to the cycle

Anticipated Start – the anticipated start date of the cycle. This will default to the create date.

Signed Off – to be checked off by a physician or nurse when the checklist is complete (to indicate that all checklist items have completed and reviewed)

Signed Off By – initials of the user who checked off Signed Off

Date Signed Off – the date the checklist was signed off

Consents

Each consent required for the given cycle type will be listed in the Consents section, along with its source and status. The Source will always be the name of the checklist unless a modifier is used. For example, if an IVF Consents Modifier has been applied to the checklist, IVF Consents Modifier will appear as the source for any corresponding consents. In order for a consent, or any other item, to be removed from the outstanding items it must be either marked as completed or waived.

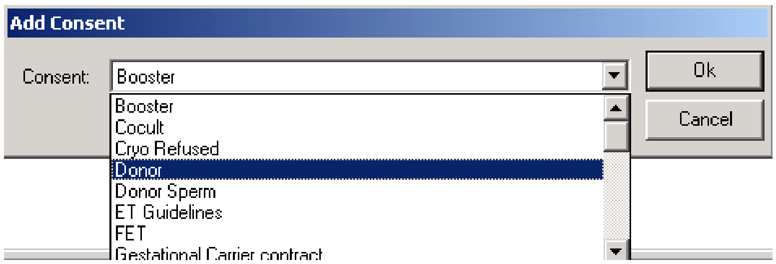
To mark a consent as completed (signed):

1 – Select the patient and cycle in the patient explorer

2 – Go to the main menu and select Cycle – Consents, or select the shortcut icon

3 – From the Consents window, click Add

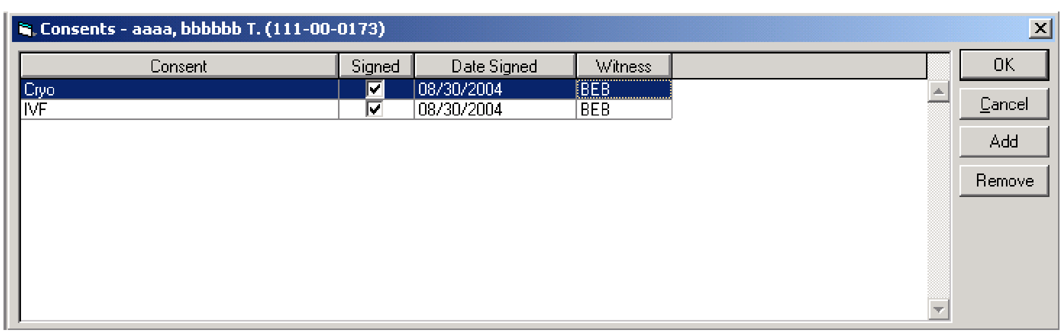
4 – Select the desired consent(s) from the Add Consent dropdown that appears and click OK



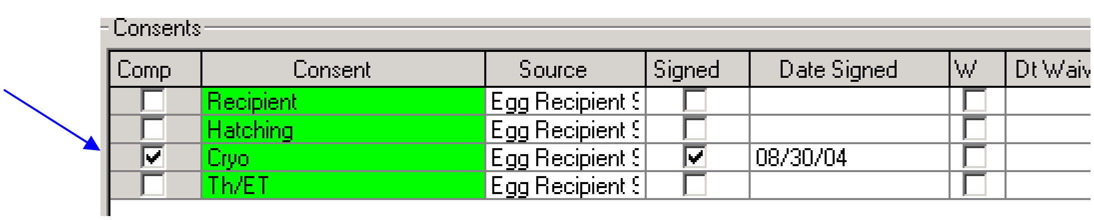
Upon clicking OK, the dropdown window will disappear and the consent will appear in the Consents window – the Signed checkbox will be checked off and the Date Signed will be entered. The initials of the user who selected the consent will appear in the Witness field.

5 – Check off 'Notarized' if applicable for any consent

To remove a signed consent, select the consent and click Remove.



Any required consent added (signed off) via the Consents window will now automatically be removed from the outstanding items view, and will marked as completed and signed off in the Checklist window.



To waive a consent:

1 – Select the patient and cycle in the patient explorer and bring up the Checklist screen

2 – in the Consents section, check off the checklist's corresponding 'W' checkbox. Upon checking this off, the current date will appear in the Dt Waived field and the initials of the user who waived the consent will appear in the User field.

3 – Any additional comments may be added in the Com field. Upon clicking on the comment field a zoom button will appear – click on it to display the zoom window.

Labs

Each lab required for the given cycle type will be listed in the Labs section, along with its source, result and status. The Source will always be the name of the checklist unless an applicable modifier is used, just as with the consents. The Labs section works basically the same as the Consents section in that in order for a lab to be removed from the outstanding items it must be either marked as complete or waived. Labs are waived the same as consents, but they are completed differently.

For a lab to be removed from the outstanding items, it must first exist in a lab order within the cycle, or exist in the lab log (with a valid date). Once a lab order has been checked off as Drawn, results can be entered. And once results are entered for a lab it can be signed off – once signed off, the lab will automatically be removed from the outstanding items. The lab results can be entered through either the lab order or the lab log and will automatically appear in the Checklist screen. The only time you have to actually go in to the Checklist screen regarding labs is to waive them.

When the cycle checklists are initially created each lab is given a time period that it is valid for. Some labs may be valid forever, while others may be valid for only the current cycle, or for a given number of months. Using the defined time period, an expiration date is automatically assigned to each lab in a given cycle's checklist according to the lab date (date performed). So a Type & Rh may be good forever, Day 3 labs may be good for only the current cycle, and HIV may only be good for 6 months. The significance of this is that if a lab exists in the lab log and it hasn't expired yet (it is still valid), even if it wasn't completed in the current cycle, the lab will appear as completed in the checklist and will not be displayed as an outstanding item. Should the lab expire, it will appear as outstanding on the next cycle's checklist.

Progress Notes (User Defined Items)

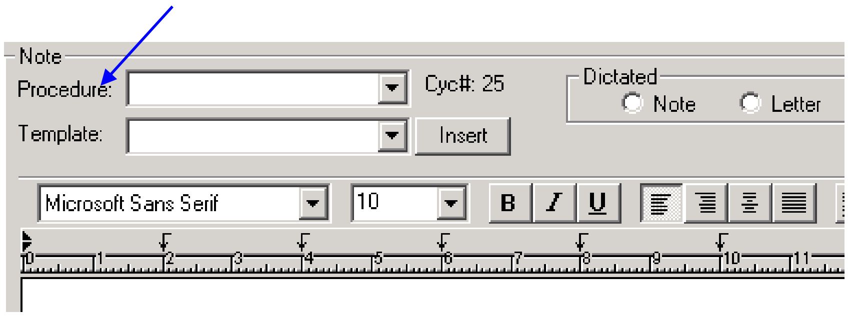
The progress note section will contain any item set up as a User Defined item when the checklist was originally created. These notes require the entry of a Cycle Status Note with a particular Procedure indicated within the note. Once this note has been confirmed it will be marked as completed in the checklist and will no longer appear as an outstanding item. Items within the Progress Notes section of the checklist may also be waived.

To create a new cycle status note (as a checklist item):

1 – Select the patient and cycle in the Patient Explorer

2 – Go to the Cycle option in the main menu and select Cycle Status Notes

3 – Proceed as if creating a standard progress note, **but** the corresponding procedure must be selected from the Procedure dropdown list (the procedure will have the same name as the item in the checklist). If the procedure is not selected the checklist item will continue to be displayed as outstanding.



4 – Click Confirm or OK. The note must be confirmed in order for it to be considered completed by the checklist.

For more information on progress notes, including cycle status notes, see the Progress Note section.