Partner Information

User Instruction

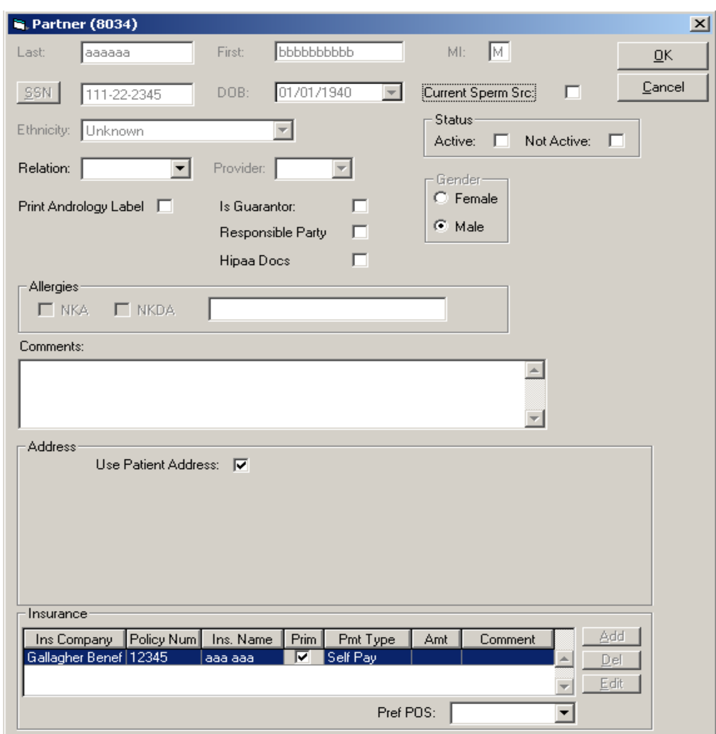
The partner function associates a partner, or partners, with a patient. A partner can be male or female, but only partners that are entered as Male will be available as sperm sources. Most of the time in RESource, a partner is not an actual patient in the system, but rather a “piece” of the selected patient’s record. A patient can have more than one partner – each additional partner is added the same as the first. All partners associated with the selected patient will appear in the Partners window.

To add a new partner

1 – select the desired patient in the Patient Explorer

2 – go to the **Patient** option in the main menu and select **Partner** OR go to **Patient Details** and click the **Partner** button. The Partners window will appear.

3 – click the **Add** button. A Partner window will appear.



4 – Complete all fields explained below:

- **Current Sperm Source** – when this box is selected, this indicates that this partner is the current sperm source for current treatment of the 'patient'.

- In the **Status** field, a partner's status can be checked off as 'Active' or 'Inactive'. Selecting 'Active' defines that partner as the one presently linked to the patient. This can be helpful when the patient has multiple partners in REsource.

-Select either Male or Female as the partner's **Gender.**

-**Responsible Party:** This was added primarily to support the Labcorp and Quest interfaces. This indicates whose insurance is responsible for the billing of the lab tests ordered.

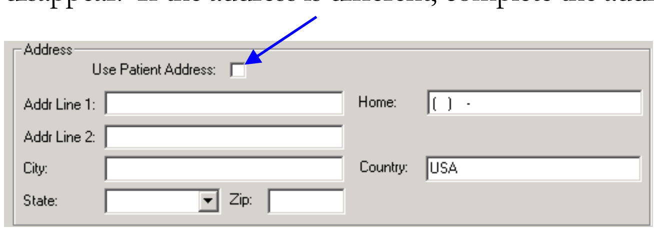
-The **Hipaa Docs** checkbox should be checked off when the required HIPAA documents have been signed by the partner.

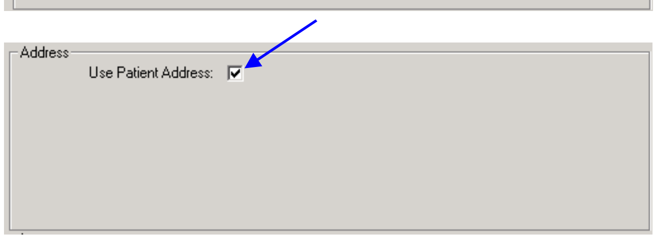
-The **Ethnicity** field provides a drop down list of options. Any ethnicity listed on the patient intake or demographic forms can be documented in the Ethnicity field.

-**Relation** field provides a drop down list a partner's relationship to the patient, such as 'husband' or 'boyfriend'.

-Any allergies listed on the patient intake or demographic forms can be documented in the **Allergies** field. The NKA checkbox should be checked if there are No Known Allergies. The NKDA checkbox should be checked if there are No Known Drug Allergies.

-In the Address section, check off 'Use Patient Address' if the partner's address is the same as the patient's – once checked, the other address fields will be disappear. If the address is different, complete the address fields provided.





-**Pref POS:** At the bottom of the partner window is an icon 

. This is to select a preferred 'point of service' for any ordered lab work during treatment. Insurances may require that tests be performed at specific labs such as Labcorp or Quest Diagnostics.

NOTE:

- For information on the **Print Andrology Label** checkbox refer to the Reports and Labels section.
- For information on the **Is Guarantor** checkbox and entering insurance information, please refer to the "Insurance" instruction.
- For explanation and instructions on the **Insurance** fields in Partner, refer to the 'Insurance' instruction.

Patient Link

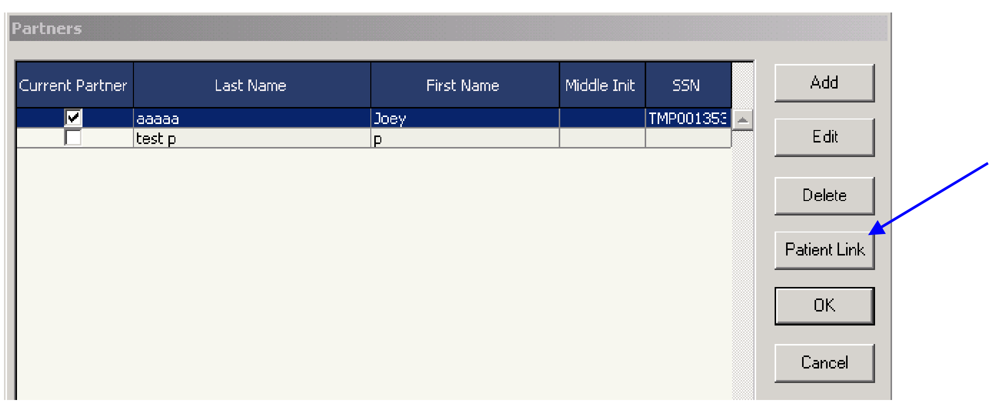
Even though most of the time the "patient" entered into RESource is the female, male patients can be entered as patients. If the partner you wish to add is already an exiting male patient within RESource, you can link his patient record to the selected patient record, now also making him a partner.

To add a partner who is an existing male patient in the system:

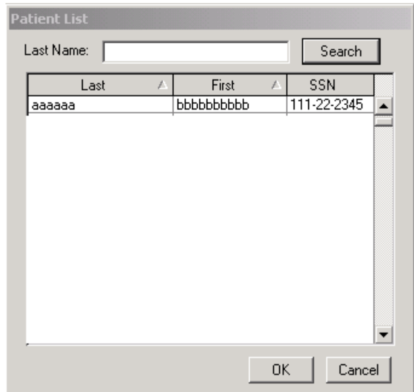
1 – select the desired (female) patient in the Patient Explorer

2 – go to the **Patient** option in the main menu and select **Partner**

3 - from the Partners window, click the **Patient Link** button.



A Patient List window will appear with a list of eligible patients. (The picture below only displays one available patient for linking, but in reality many may appear in the space provided.)



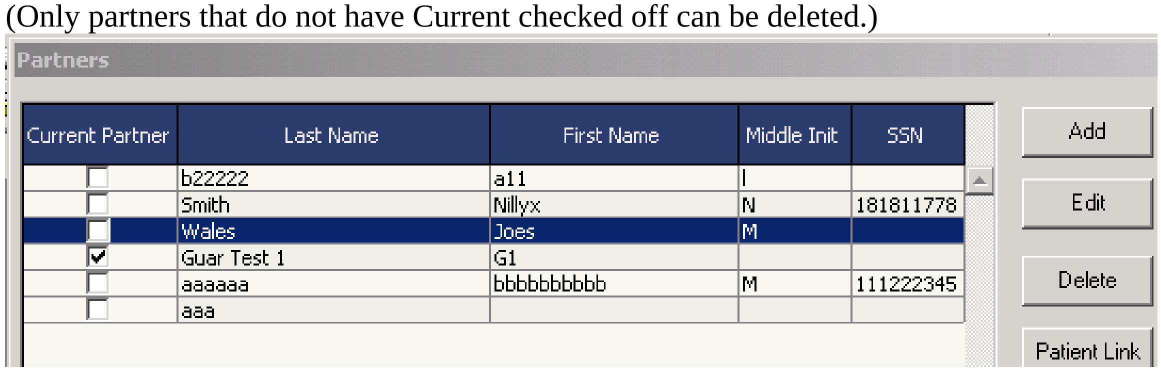
4 –select the desired patient from the list and click **OK**. This patient will now show up in the Partners window.

5 – with the new partner selected, click the **Edit** button. You will notice that the name, SSN, DOB, Gender and any insurance information have been automatically filled in (according to what the partner has entered in his original patient record).

6 – if this partner is to be considered a sperm source (for Sperm Analysis purposes) the **Add Sperm Source** button should be clicked. For more information on Sperm Analyses refer to the 'Andrology' section.

To delete a partner

1 – from the Partners window select the partner record to be deleted
(Only partners that do not have Current checked off can be deleted.)



2 – click the **Delete** button. Choose **Yes** at the prompt.

NOTE: In the 'Partner' window, there are certain drop down selections that may require administrator set up to complete the fields. This is located in **Lookup Table Manager** under **Maintenance** on the main toolbar. Necessary tables for the 'Partner' window are: lkupEthnicity, lkupRelations, lkupProviders, and lkupLabPOS.