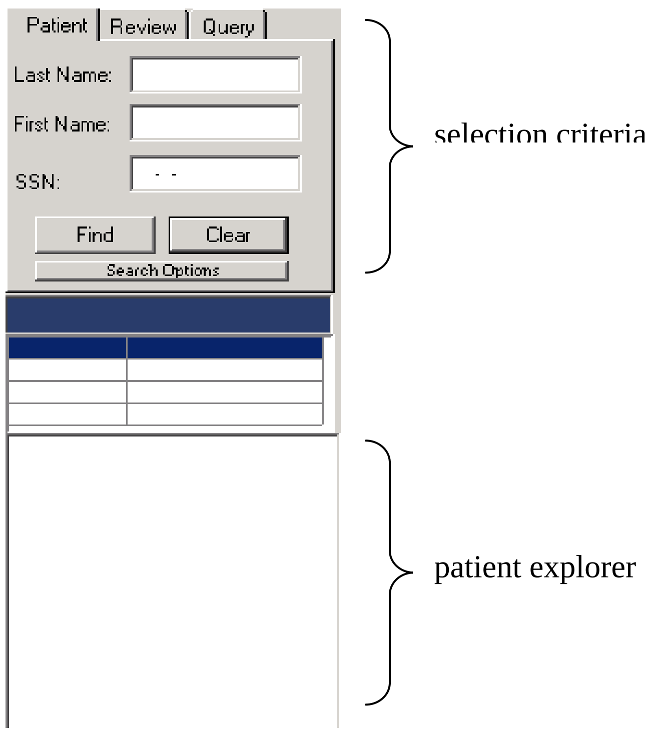
Patient Explorer

User Instruction

The patient explorer displays a list of patients meeting the selection criteria specified. Criteria are entered in the selection criteria window that is located above the explorer.

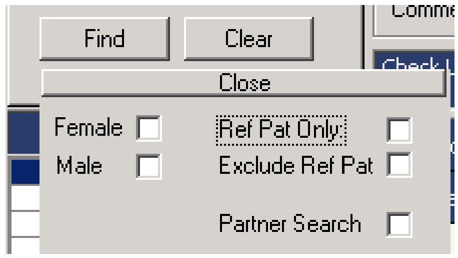


There are three tabs where selection criteria can be entered: Patient, Review and Query. Pressing the Find button or <Enter> key will generate a search. Pressing the Clear button clears the results of the last search (the patient list) and the search criteria fields.

Patient Tab

The fields in the patient tab allow selection of patients by any combination of Last Name, First Name and Social Security Number. Leaving these fields blank selects all patients. The Search Options button reveals a group of check boxes that add additional criteria to your search. Note that while hitting the Clear button will clear your search results and other criteria, it will not clear any criteria selected in the Search Options section – you must manually go back into the Search Options and unselect the previously chosen criteria.

Search Options expanded:



There are different types of patients in RESource: Female, *Male, Reference, Donor and Infertility. The Search Options allows you to further limit your search by Female, Male and/or Reference patients.

The Partner Search allows you to search for a female by using her partner's name in the selection criteria. You may come across a situation where you have lab results for a partner and you need to know the patient's name in order to enter the results (in most cases the "patient" is the female regardless of the couple's diagnosis). This would be a situation where you could use the Partner Search:

1 – Hit the Search Options button and check off Partner Search

2 – Enter the partner's first name, last name and/or social security number in the selection criteria (in the Patient Tab) and hit the Find button or <Enter> key

3 – The list of patients (or patient) that appears are patients who have partners matching the selection criteria entered. If more than one patient is listed, you will need to either enter more specific selection criteria or go to the main menu for each patient and look up their partner. To view a patient's partner, highlight the patient name in the patient explorer, go to the main menu and choose Patient-Partner.

*There is a difference between a male patient and a partner. Most patients entered into RESource are female and their partner, whether a male or female, is entered as a record within her chart. But a male patient is entered as an actual patient in the system. For more information on male patients and how to enter partners see the Patient Services section.

Review Tab

This tab offers several criteria options for selecting lists of patients:

- **Daily Review** – Selects patients that have been placed in Review for the current day. A patient will be in review if she has a lab order for the given day or has the Rev event in her stim sheet for the given day.

  Type – patient current cycle type

Location – patient primary location

Lab IP – patients with blood work that has been drawn and results are in progress (for in-house blood work)

Lab Comp – patients with blood work that has been drawn and results are complete (for in-house blood work)

- **User** – Select patients by primary doctor or nurse

  User – patient primary doctor or nurse

  Status – patient cycle status

  Type – patient cycle type

  Add – use this button to apply the selected criteria (status and type) to the patients' current cycles only

- **To Do** – Select patients in Review who are left to be reviewed or called

  List – select Review list or Call list. A patient is considered reviewed when a PROV has been entered in the stim row for the given day. A patient is considered called when Cl has been checked off in the stim row for the given day.

  Type – patient cycle type

  Location – patient primary location

  User – patient primary physician or nurse

  Lab IP – patients with blood work that has been drawn and results are in progress (for in-house blood work)

  Lab Comp – patients with blood work that has been drawn and results are complete (for in-house blood work)

  SI Loc – apply the selected Location to the location where the patient signed in that day, not their primary location

- **Global folder**

  Selects all patients that have been added to the current user's Global Review Folder. These records can be reviewed and deleted by any user.

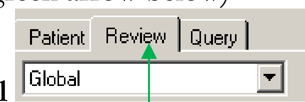
  <u>To add a patient to a Global Review folder:</u>

  1. Highlight the patient and right click on the mouse to bring up a selection list.
  2. Select **Add to Review Folder**

3. Select **Add to Global Review**

To view patient records in the Global Review Folder:

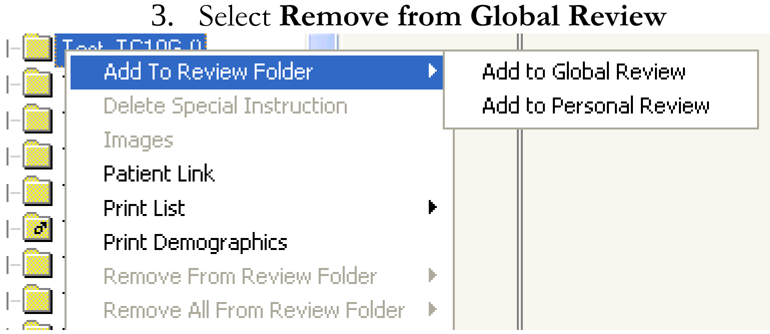
1. Hit the Review Tab on the Patient Explorer (green arrow below)



2. From the drop down selection, choose **Global**
3. Click **Review**
4. A list will display for all patients that were selected for global review.

To remove patient records from Global Review:

1. Highlight the patient and right click on the mouse to bring up a selection list.
2. Select **Remove from Review Folder**
3. Select **Remove from Global Review**



- **Personal** –
  This works like the Global folder except anyone can **View** this folder and anyone can **Add/Remove** patients from the folder. This selects all patients that have been added to the current user's Personal Review Folder. Patients are added to a user's Personal Review Folder by using the pop-up menu in the patient explorer (select the patient name - right click – select Add to Personal Review). A patient will remain in a user's personal review until manually removed (select the patient name - right click – select Remove from Personal Review)

- **Date Of Surge** - Selects patients who have a stim row with an event of Srg or NSrg on a date equal to the selected date

  Date – stim date with Srg or NSrg

  Type – patient cycle type

- **Unconfirmed Progress Notes** - Selects patients that have Unconfirmed Progress notes. For information on entering progress notes see the Progress Notes section.

  Type – select all unconfirmed notes or only unconfirmed notes that have Transcription Finished checked off

Author – progress note author

Editor – progress note editor

- **Scheduled IVF** - Selects patients that are scheduled for IVF within the selected date range.

  Start Date – start date in date range

  End Date – end date in date range

  User – patient primary physician or nurse

- **Andrology** - Selects patients that have a sperm analysis either Submitted for Review or Reviewed for a selected analysis date range.

  Start Date – start date in date range

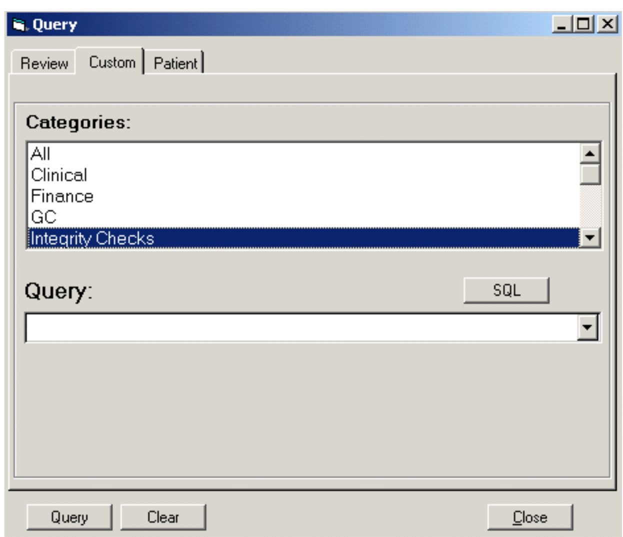
  End Date – end date in date range

  Submitted – analysis has been submitted for review, but not yet reviewed

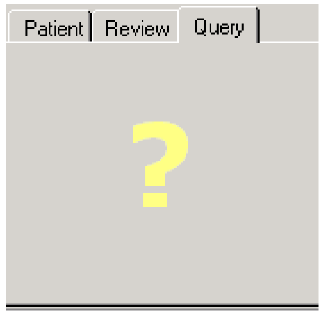
  Reviewed – analysis has been reviewed

Query Tab

This tab functions as an expansion of the Review tab, and also contains a Custom tab to access custom queries. When the Query tab is selected a small screen containing the two tabs will be displayed. You can move this screen by clicking on the blue border and dragging it. You can also minimize this screen by selecting the minimize button in the upper right corner.



If you minimize or close the Query screen you can re-display it by clicking in the open space below the Query tab in the Patient Explorer (this space will either contain a yellow question mark or other yellow text).



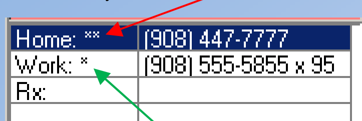
The Review tab works the same as the previously described Review tab. When you enter the criteria and hit the Review button on this screen, the results will appear in the patient explorer. The Custom tab gives users access to queries that are created specifically for this tab. Upon selecting a category and a query from the dropdowns, the corresponding query parameter options will appear (i.e. MD, NRS, date range) – once all criteria have been entered, hitting the Query button will display the resulting patient list in the patient explorer. Hitting the Clear button will clear the patient list from the Patient Explorer.

Selecting a Patient

Once you have entered search criteria and pressed the Find button, a patient or list of patients meeting your criteria will appear in the Patient Explorer. To select a patient, mouse-click on the patient name. Displayed directly below the Search Options button will be the selected patient's name and phone numbers.

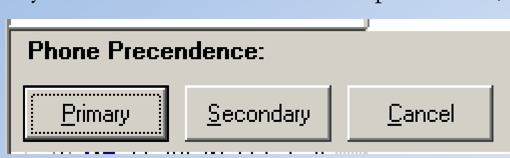
TIP: You can select a primary or secondary phone number for a patient. Double Click on the desired phone type, such as 'Home' or 'Work'. This will place an asterisk (*) indicating this is the primary phone number. Double clicking a different phone field under the same patient will place two asterisks (**) to signify secondary phone.

Secondary Phone



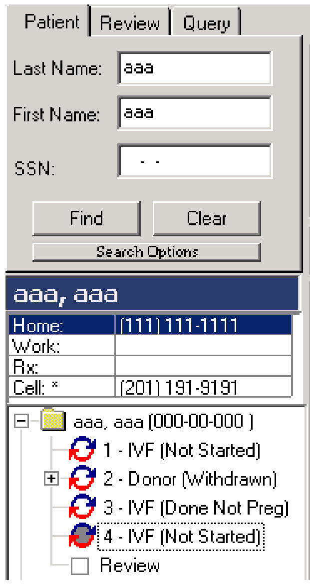
Primary Phone

If you were to double click a third phone field, a window would display:

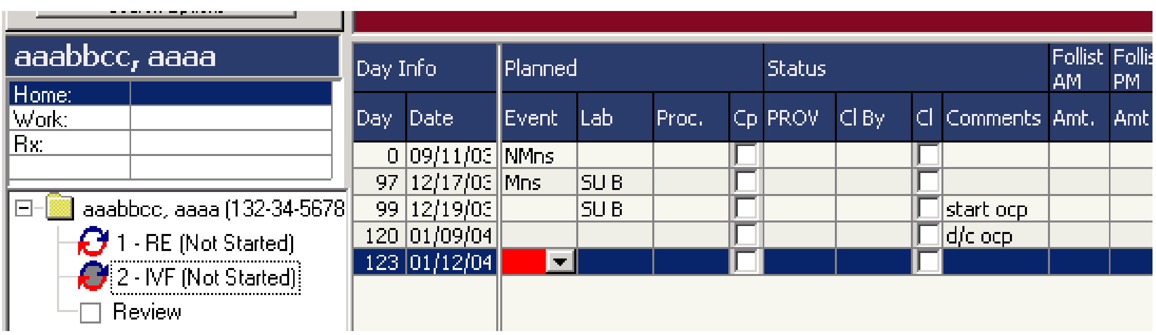


This is asking you to choose this field as primary or secondary. You **cannot** choose a tertiary phone number. When selecting either Primary or Secondary, the previously selected fields will adjust accordingly. To remove a selected field marked primary or secondary, double click on the field and the asterisk(s) will be removed.

At the bottom of the patient explorer, the patient's primary physician, nurse and financial coordinator are listed. Double clicking on a patient name, or clicking on the (+) sign to the left of the patient name, expands the patient node/folder revealing all cycles created under the patient. A patient can have multiple cycles. The cycle that is active will have the center of its symbol shaded in. Each cycle is displayed with its cycle number, cycle type and cycle status.

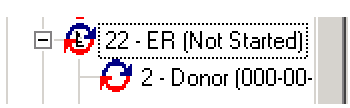


Selecting a cycle displays the stim sheet for that cycle. Each cycle will only have one stim sheet.

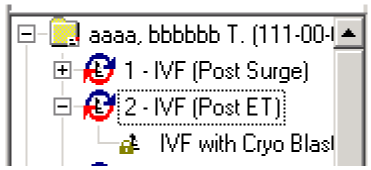


A cycle with a (+) sign to the left of it indicates that there is a link to that cycle – either a lab (embryology data) or a donor/recipient link. A cycle with a microscope in the center of the symbol indicates that the cycle contains a lab. A cycle can have both a lab and a donor/recipient link. Double clicking on a cycle, or clicking on the (+) sign to the left of the cycle, expands the cycle node revealing the lab and/or donor/recipient link.

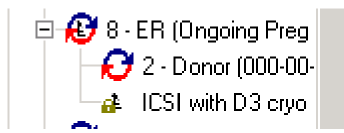
Donor link expanded:



Embryology lab (cycle #1 unexpanded, cycle #2 expanded):



Donor link and Embryology lab within the same cycle, expanded:



Right clicking on a patient name or cycle node in the patient explorer displays a pop-up menu. Depending on which one you have selected will determine what options in the menu are enabled.

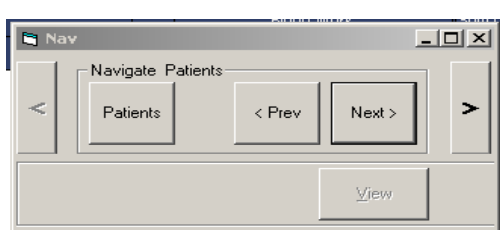
Most male patients will not have cycles assigned to them and therefore will not have stim sheets. Instead, when you select a male patient, you will see a progress note history screen where a stim sheet would normally be. The exception to this is a male patient who is using an egg donor and gestational carrier, and is the intended parent of the gestational carrier cycle – this male patient will be assigned a cycle and a stim sheet for purposes of linking him to the donor and carrier cycles. Donor/recipient links are discussed in more detail in the Clinical section. A male patient is indicated by a symbol in his chart: .

TOUCH on the MAIN TOOLBAR

Another useful tool for navigating on the main window of RESource is the Touch button. This screen is primarily intended to be used with touch screen interfaces (i.e. IPAD) for viewing data.

On the main toolbar click **Touch** (green arrow).

The Nav window appears:



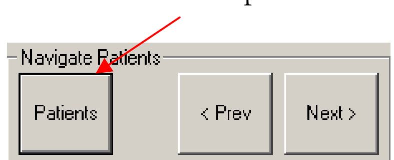
This window allows navigation through patients and cycles in Patient Explorer. Once you have entered search criteria and pressed the **Find** button, a patient or list of patients meeting your criteria will appear in the Patient Explorer.

To View Patients through Touch:

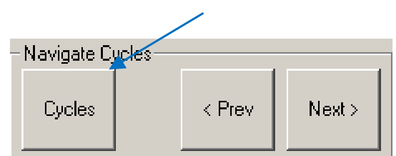
- When the button displays **Patients,** it will navigate through the selected list in Patient Explorer.
- Click **Next** or **Prev** (previous), allows you to navigate through the list of patients. As you navigate, the (+) sign to the left of the patient name expands the patient node/folder revealing all cycles created under the patient.
- This will continuously expand and close for each patient with each "Next" or "Prev" selection.
- Click the **View** button will display the patient's current cycle stim comments.

To view Cycles through Touch:

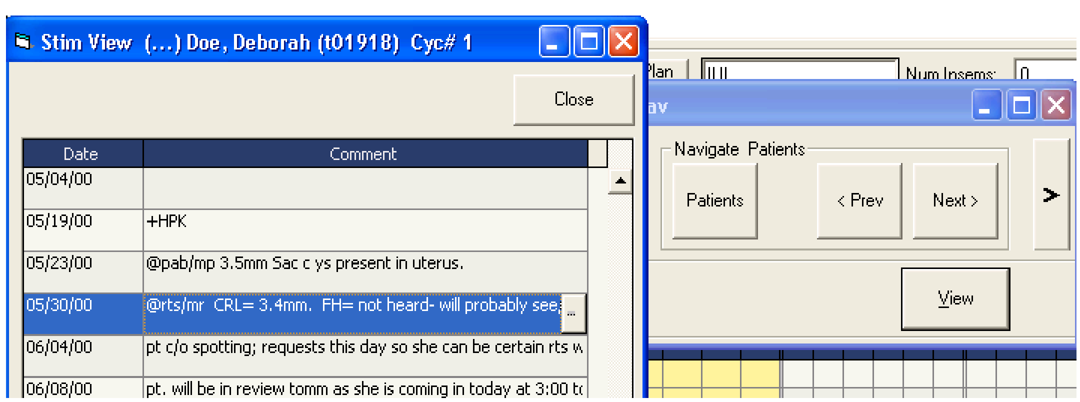
- To navigate through the cycles under a selected patient, click the **Patient** (red arrow) button in the Touch window.
- The button will change to **Cycle** (blue arrow) and reveal all the cycles created under the patient.

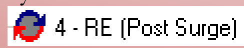


TO



- Once changed to Cycle, a user can navigate through the cycles of this patient using the **Prev** and **Next** buttons.
- Click the **View** button to display the stim comments of the selected cycle.



NOTE: A patient can have multiple cycles. The cycle that is active will have the center of its symbol shaded in.  Each cycle is displayed with its cycle number, cycle type and cycle status. 

When viewing the cycles of a patient through the Touch window, the current cycle of the patient is the first displayed. From this point, a user can navigate to the previous or next cycle.