



Med Software LLC  
 Created: 7/20/2012  
 Version: 1  
 Page: 1 of 5  
 By:KLM

# Patient Vs. Partner Links

## User Instruction



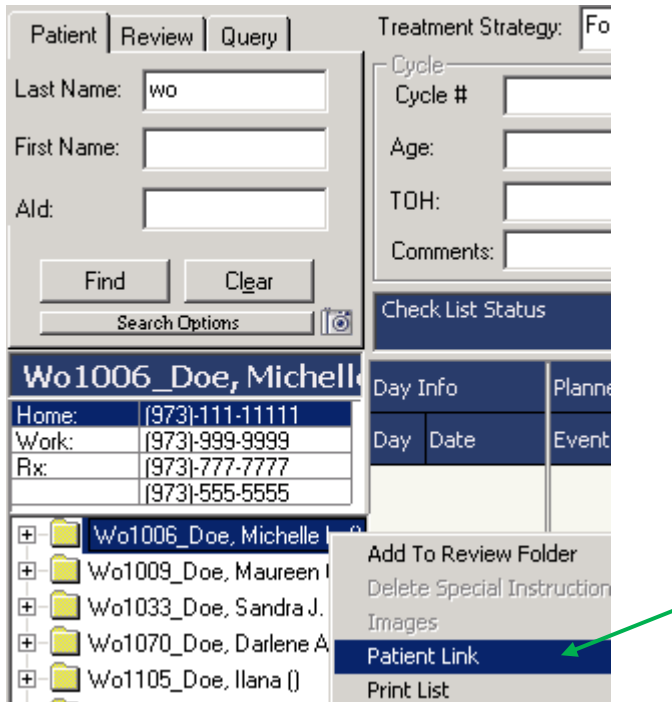
### Patient Link, Partner Link: What is the difference?

The difference between a patient link and a partner link is that, with a partner link, a partner record is created in the patient chart at the same (in addition to the SA's being visible in both charts, checklist linking, etc.) time. A patient link simply shows you the two charts are "linked" but nothing merged/combined in their patient data. Essentially it is just a visual link in the Patient Explorer folder tree.

### Creating a Patient Link

A patient link is established by:

- 1 - right-click on a chart and select Patient Link

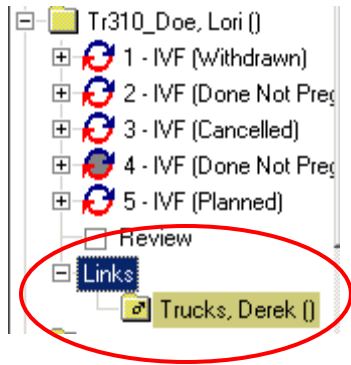


- 2 – From the Patient Links window that appears, click Patient Link

- 3 – Enter all, or part, of the last name of the patient you want to link to. Click Search.

- 4 – Select the desired patient from the list that appears and click OK
- 5 – Click Done.

You will now see a '+Links' displayed under the patient's cycle. Clicking this will display the linked patient chart.



To Remove a Patient Link:

- 1 – Right click on the patient chart and select Patient Link
- 2 – Select the patient name in the Patient Links window and click Delete

**Note:** You cannot create a Partner link between a patient and a partner if a Patient link already exists. If the patient has '+Links' displayed beneath her cycle list you can quickly tell if it is a Patient link or a Partner link by right clicking on the patient chart and selecting Patient Link. If a name is displayed in the Patient Links window then a Patient link exists and will need to be removed first.



## Creating Partner Link

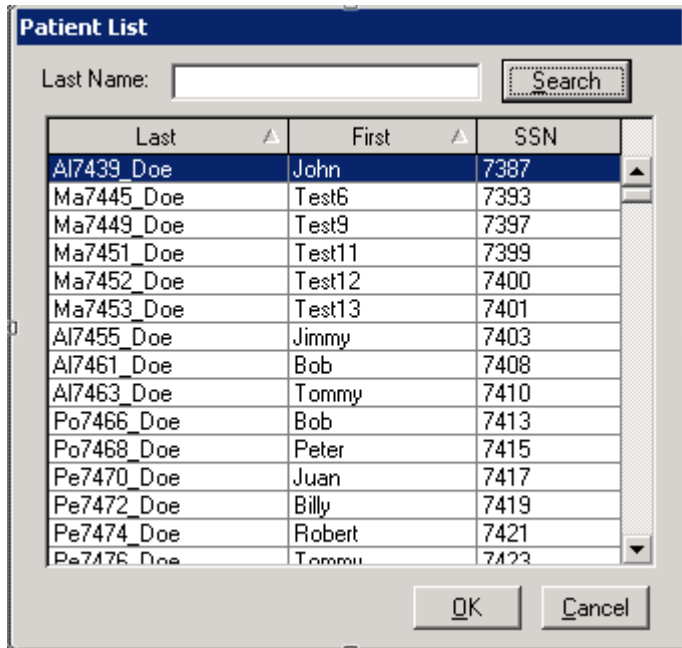
Linking an already existing male patient as a partner to another patient record  
Both females and males (patients and partners) can have patient charts in REsource. If you wish to add a partner record to a female chart, and the partner has an existing (male) chart you can simply create a link. This will link the charts and create a partner record in the patient chart.

To add a partner link:

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 **Pat/Part Link** button.



- A Patient List window will appear with a list of eligible patients.



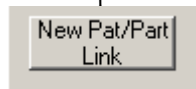
- Select the desired name from the list and click **OK**. This patient will now show up in the Partners window.
- With the new partner selected, click the **Edit** button. You will notice that the name, SSN, DOB, Gender and any insurance information have been automatically filled in (according to what the partner has entered in his chart/patient record).

**Note:** 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.

#### Linking an new male patient as a partner to another patient record

To add a partner a new chart for the partner at the same time:

- Select the desired (female) patient in the Patient Explorer
- Go to the **Patient** option in the main menu and select **Partner**
- From the Partners window, click the **New Pat/Part Link** button. This function creates a partner record for the selected patient, creates a chart for the partner (using the selected patient's demographic information), and links the patient and partner charts. This may be useful for quickly creating a male partner (i.e. Husband) record, plus chart, to an existing female patient.



If a partner record is part of a Pat/Part link, the font used in the demographic info of the partner will be greyed out.

Partner Link:

Partner (5537)

Last: Luca First: Tony MI: F

SSN: DM0-00-7427 DOB: 01/11/1961 Current Sperm Src:

Ethnicity: Unknown Status: Active:  Not Active:

Relation: Husband Provider: Gender:  Female  Male

Print Andrology Label  Is Guarantor:  Responsible Party

Patient Link:

The font used in the demographic info of the partner will NOT be greyed out if a patient link is established.

Partner (5440)

Last: do7253\_Poe First: test MI:

SSN: DM0-01-3023 DOB: 02/12/1976 Current Sperm Src:

Ethnicity: Unknown Status: Active:  Not Active:

Relation: Husband Provider: BTM Gender:  Female  Male

Print Andrology Label  Is Guarantor:  Responsible Party  Hipaa Docs

Patients with more than one partner linked

When more than one partner is linked to a patient, they will both show when clicking the '+Links' button under the patient chart. The partner that is marked 'Active' in his chart will be highlighted green (see image below).

Wr3476\_Doe, Kristen N.

- 1 - IVF (Done Not Pre)
- 2 - IVF (Done Not Pre)
- 3 - IVF (In Progress)
- Review
- Links
  - Wright, Steven ()
  - Wrong, Liam () ← This is the active partner

**Partner (5540)**

Last:  First:  MI:

SSN:  DOB:  Current Sperm Src:

Ethnicity:

Status:  
Active:  Not Active: