Patient Details

User Instruction

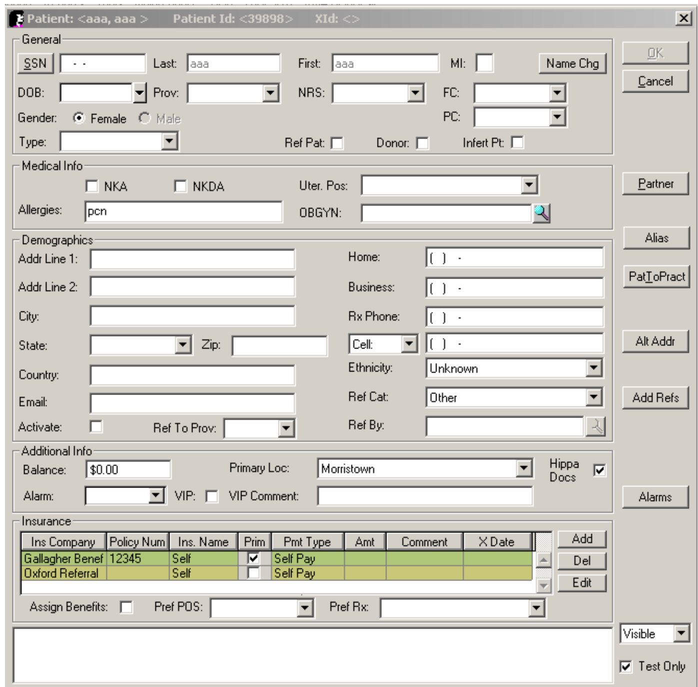
RESource

The first step to establishing a patient record in RESource is to enter Patient Details (demographic information). Once a patient exists in the system, a cycle, physical exam, progress notes, etc. can be generated for the patient.

The purpose of the Patient Details window is to capture patient demographic information such as social security number, address, date of birth, and also the primary MD, nurse and financial coordinator. Fields containing an arrow button indicate there is a drop down list with options to choose from.

To bring up a new Patient Details window, to enter a new patient, go to the Patient option in the main menu and select New Patient. Note, however, that most new patients will not be entered into RESource this way. Most patients will be entered through the patient scheduler. When scheduling an appointment in the patient scheduler, a Patient Appointment window will appear – entering the patient's demographic and initial consultation information here will carry over to the patient's Patient Details and Scheduling Details. The patient scheduler will be explained separately in the Patient Scheduler section, and Scheduling Details will be discussed later in this section.

To access an existing patient's Patient Details, you must first search for the patient in the Patient Explorer. If more than one patient results from the search criteria, you need to select the desired patient, then go to the Patient option in the main menu and select Patient Details. The shortcut icon for **Patient Details** is , and the shortcut key is **Ctrl D**.



The Patient Details window is divided into 5 sections: General, Medical Info, Demographics, Additional Info, and Insurance. (Some fields, such as Last Name, First Name and Address, are self-explanatory and will not be explained individually below.)

General

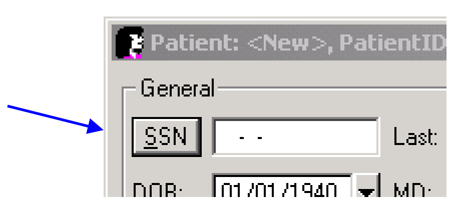
Social Security Number

When entering a new patient, if she does not have a social security number or does not want to give you her number, you can assign her a temporary or permanent social security number in RESource. You would choose to assign a permanent number to an individual who, for example, is not from this country and does not have a social security number. A temporary number is assigned to an individual who will eventually replace the temp number with an actual one, or to an Inquiry patient.

To assign a social security number:

1 - From the main menu select Patient – New Patient to open a new Patient Details window OR from the patient scheduler, double click on an appointment to bring up the Patient Appointment form

2 – Click the **SSN button** in the upper left corner of the window



3 – Choose to assign a temporary or permanent social security number and hit **OK**

A unique social security number will be assigned by REsource and will appear in the field next to the SSN button. A temporary number will begin with the letters TMP and a permanent number will begin with PRM.

Gender

Both female and male patients can be entered into RESource. The default gender is female and RESource will always assume that, unless Male is selected.

Ref Pat, Donor, Infert Pt

There are three basic categories of patients to choose from in the Patient Details window: Reference Patient, Donor and Infertility Patient.

1. A Referring Patient is an individual who visits the practice for a specific test or lab work – he/she is typically a patient of another facility who has been referred for lab work only. Example: a male who is referred for semen analysis.
2. A Donor is an individual who is coming to the practice to donate oocytes. When checked, donor information in the demographics section will not transfer to the billing system.
3. Infertility Patient is an individual who is coming to the practice for infertility treatment (the majority of patients entered into RESource).

Prov:

The Prov field is used to document the patient's current primary provider. The drop down box will provide a list for you to select the appropriate option.

NRS:

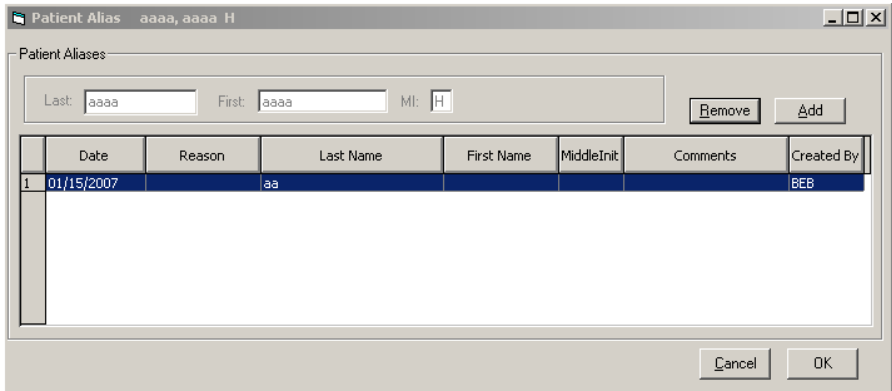
The NRS field is used to document the patient's current primary nurse at your practice. The drop down box will provide a list of nurses for you to select the appropriate option.

FC:

The FC field is used to document the patient's current financial coordinator. The drop down box will provide a list of nurses for you to select the appropriate option.

Name Change:

Use this button to edit the patient's name. This will change the name that is associated with all cycles and records.



<u>To create a new 'alias' or name:</u>

1. Click the **Add** button

2. This will enter the next numbered row under the existing rows in the window.

3. Highlight this new row by clicking on it.

4. You can enter changes into each individual field by directly clicking on it or by pressing tab to move over a field.

5. Date: this field automatically populates with the date the new name was created.

6. Reason: select the reason a patient gave for the name change such as married or divorced.

7. Last Name: enter patient's new last name.

8. First Name: enter patient's new first name.

9. Middle Init: enter patient's new middle initial.

10. Comments: this is a free text field to enter any comments for this record.

11. Created By: this field will automatically populate with the initials of the user who created the new name.

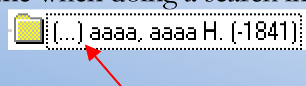
To remove a name:

1. Highlight the record you wish to remove by clicking on it.

2. Click the **Remove** button.

3. Click **yes** at the prompt.

TIP:
Any patient that has had a change to the original name in REsource will have (…) in front of the name when doing a search in Patient Explorer.

Example: 

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Doing a search under the original name or under the newly entered name, will retrieve the same patient record.

Medical Info

Uterine Position

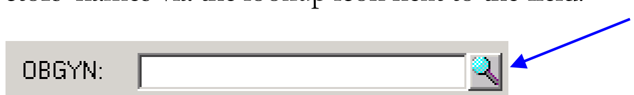
Clinical personnel will complete any data entry for this field.

Allergies

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. Any information entered in the Allergies field will be displayed via the Allergies button that appears in the cycle details section of a patient's stim sheet.

OBGYN

The OBGYN field is used to document the patient's current OB/GYN. You can choose from a list of doctors' names via the lookup icon next to the field.

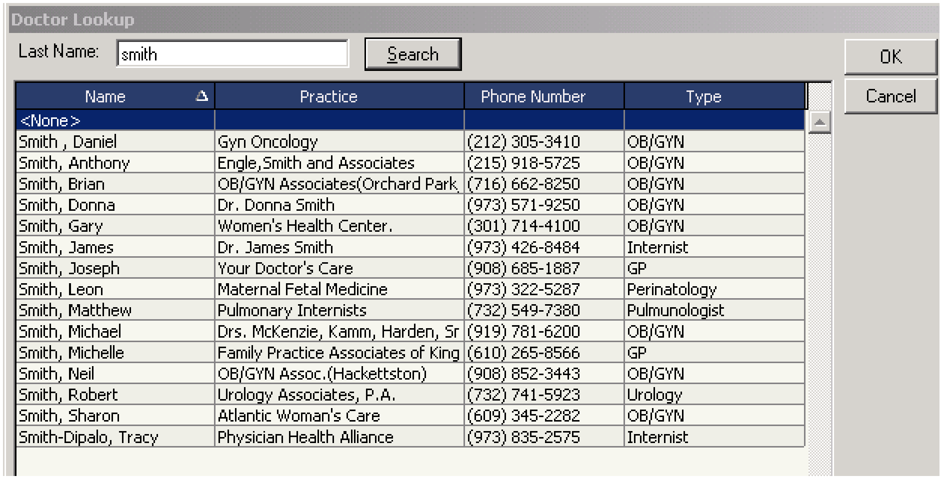


To look up a doctor:

1 – Click the **lookup icon**. The Doctor Lookup screen will appear.

2 - Type the referring doctor's last name, or part of the last name (Smi for Smith), in the field provided

3 - Click the **Search** button



Name	Practice	Phone Number	Type
<None>			
Smith , Daniel	Gyn Oncology	(212) 305-3410	OB/GYN
Smith, Anthony	Engle,Smith and Associates	(215) 918-5725	OB/GYN
Smith, Brian	OB/GYN Associates(Orchard Park	(716) 662-8250	OB/GYN
Smith, Donna	Dr. Donna Smith	(973) 571-9250	OB/GYN
Smith, Gary	Women's Health Center.	(301) 714-4100	OB/GYN
Smith, James	Dr. James Smith	(973) 426-8484	Internist
Smith, Joseph	Your Doctor's Care	(908) 685-1887	GP
Smith, Leon	Maternal Fetal Medicine	(973) 322-5287	Perinatology
Smith, Matthew	Pulmonary Internists	(732) 549-7380	Pulmunologist
Smith, Michael	Drs. McKenzie, Kamm, Harden, Sr	(919) 781-6200	OB/GYN
Smith, Michelle	Family Practice Associates of King	(610) 265-8566	GP
Smith, Neil	OB/GYN Assoc.(Hackettston)	(908) 852-3443	OB/GYN
Smith, Robert	Urology Associates, P.A.	(732) 741-5923	Urology
Smith, Sharon	Atlantic Woman's Care	(609) 345-2282	OB/GYN
Smith-Dipalo, Tracy	Physician Health Alliance	(973) 835-2575	Internist

4 – Select the doctor from the list that appears and click **OK**. You will now see the selected doctor's full name in the OBGYN field.

If the physician you are searching for does not appear in your search results, he/she will need to be added to Doctor/Practice Maintenance. Doctor/Practice Maintenance is a feature within RESource that allows us to record physicians, along with their practice information (address, phone number, etc), that refer patients to our practice and who we discharge patients to. Doctor/Practice Maintenance can be found by selecting the Maintenance option from the main menu. Note that there is usually one person designated to update the physicians and practices. For more information on this feature, refer to the Doctor/Practice Maintenance section.

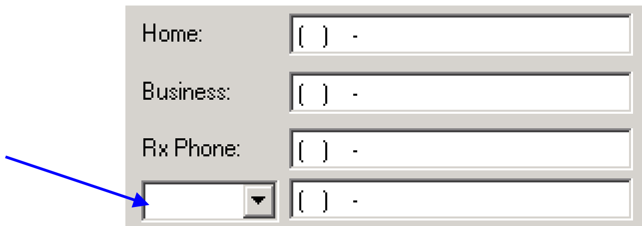
Demographics

Activate

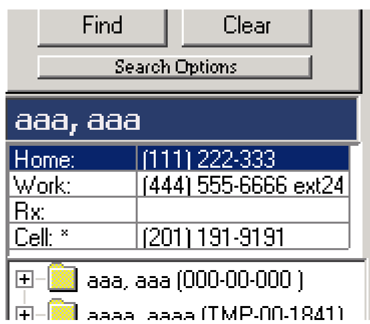
The Activate check box is used to allow the sending of a patient's daily results/instructions to her via e-mail. This requires a consent to be signed by the patient – when/if the consent is signed, this checkbox is checked. Usually, one person is designated to keep track of the consents and activating the e-mail. When checked off, an e-mail can be generated and sent to the patient directly from her stim sheet. Sending results/instructions via e-mail is explained in the Clinical section.

Miscellaneous Phone

Often, a patient will have another phone number outside of home and work (i.e. Cell phone). Below the RxPhone (pharmacy phone number) field you will notice a dropdown option along with a corresponding field for a phone number. In the dropdown there is an option for Cell and for Other – you can select one of these options and enter the corresponding number.



All phone numbers entered in Patient Details will be displayed in the Patient Explorer when the patient is selected.



Ethnicity

This 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.

Ref Cat and Ref By

The Referral Category field provides a drop down list of options. Some selections in the drop down list are general categories – specifics can be typed in the Referred By (Ref By) field. For example, if the Referral Category is "Friend", then "Jane Smith" can be typed into the Referred By field. If a Referral Category of "Doctor" is selected, you can choose from a list of doctors' names via the magnifying glass icon next to the Referred By field. The magnifying glass icon will only be enabled when the Referral Category selected is Doctor.

This icon displays a Doctor Lookup window where you can search for a doctor by his/her last name. The selected doctor's full name will then appear in the Ref By field (this works the same as it does in the OBGYN field).

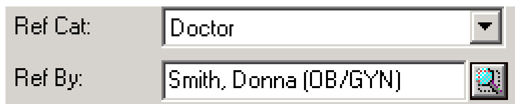
To lookup a physician name:

1 – When in the Patient Details screen, choose "Doctor" from the Ref Cat drop down list

2 – Click the **magnifying glass icon** to the right of the Ref By field. The Doctor Lookup window will appear.

3 – Continue as described previously for the OBGYN field

4 – Once selected, you will see the doctor's full name in the Ref By field



Ref to Prov

This is an extension of the Ref Cat and Ref By drop down lists of options. This drop down list is to select the particular practitioner/provider that the patient was referred to in your practice.

Additional Info

Balance

This field is used when an interface has been established between RESource and the billing system. If an interface exists, then the patient's account balance from the billing system will be displayed in this field.

Primary Location

If your practice has more than one office, this field will indicate the patient's primary location/office.

VIP and VIP Comment

The VIP checkbox can be checked off if you wish to designate the patient as a VIP (for example, if the patient is a personal friend of a physician in the office). Indicate why the patient is a VIP in the VIP Comment field. When a patient is brought up in the Patient Explorer, you will notice a yellow folder to the left of her name – if the patient is a VIP she will have an orange tab on her folder. 

Alarm

The purpose of an alarm is to display an alarm message whenever the patient is selected in the Patient Explorer. This is reserved for special circumstances. For example, if there is a legal issue regarding a patient, and a message needs to be given to staff to not discuss the patient with anyone, an alarm will be set by an administrator. If an alarm has been set for a patient, upon selecting her in the Patient Explorer you may get a message similar to:

Hipaa Docs

The Hipaa Docs checkbox should be checked off when the patient has signed the required HIPAA documents.

Insurance

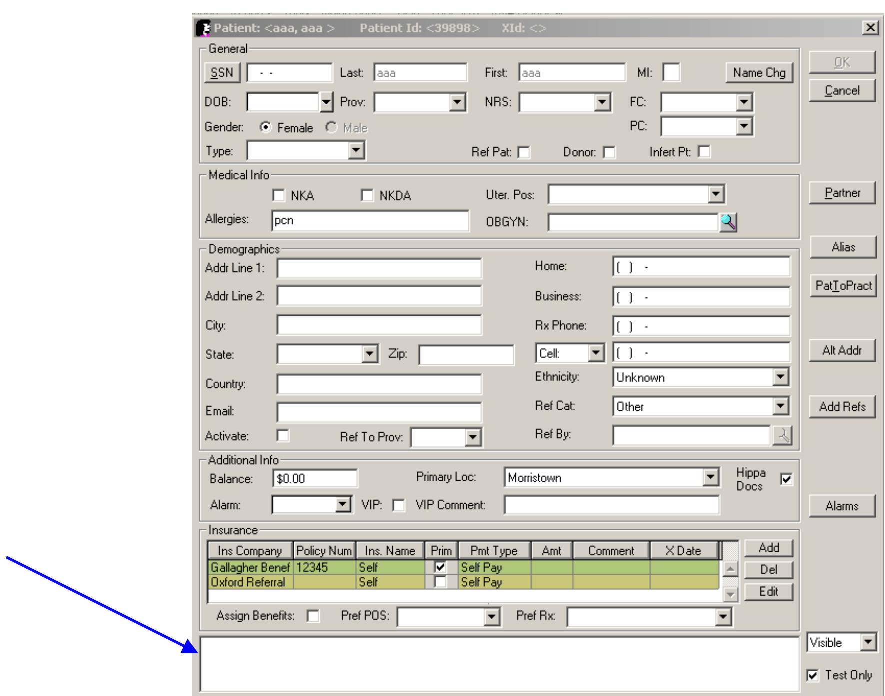
For explanation and instructions on the Insurance fields in Patient Details, refer to the Finance section.

Test Only

The Test Only checkbox can be used to indicate that the patient is not an actual patient in the system. There are some “patients” in RESource that are used for demonstration and training purposes only – they can be designated as Test Only which will allow them to be excluded from queries and data extraction (since they contain invalid data).

Additional Comments

At the bottom of the Patient Details window there is a comment section where you can type any additional comments.



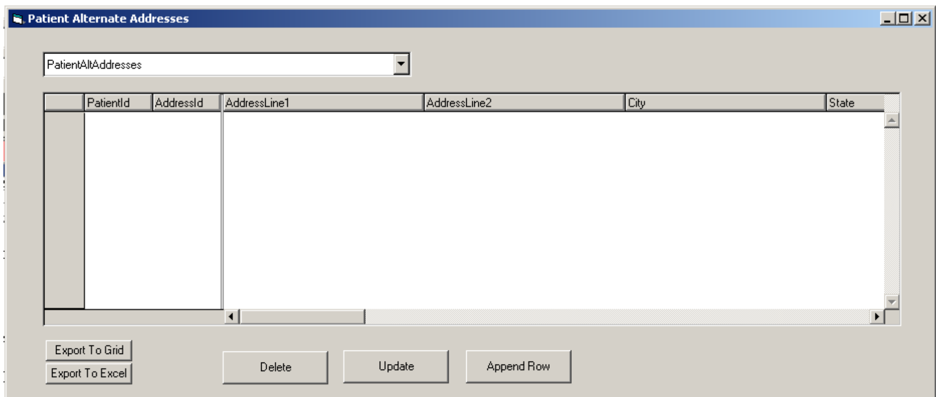
Alias

This icon is the same as the 

icon. This is another quick link to the same 'Patient Alias' window to change the name of a patient. For details, please refer to 'Name Change' instruction. [Name Change](#) -please click the link and hold the CTL button simultaneously to jump to this segment.

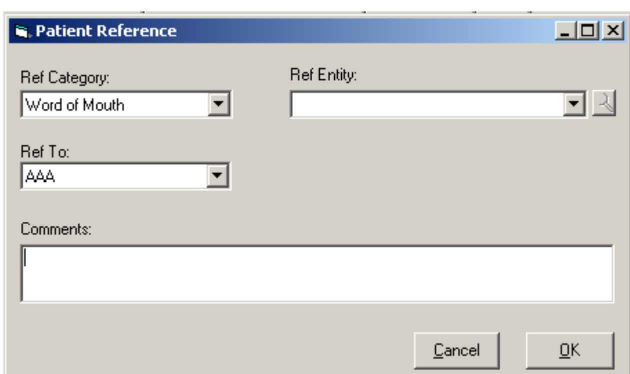
Alt Addr

This button, when clicked, will bring a lookup table to fill out alternate addresses in a patient record. If you do not have permission to enter this, please see an Administrator.



Add Refs

Click this icon if a patient has been referred by more than one source to your facility. This screen will allow you add, delete, or edit multiple references for this patient. If this is the first reference to be entered, your only choice is to click **Add**. (Both **Edit** and **Delete** buttons will be grayed out.) When you click on the **Add** button, a Patient Reference window will appear.



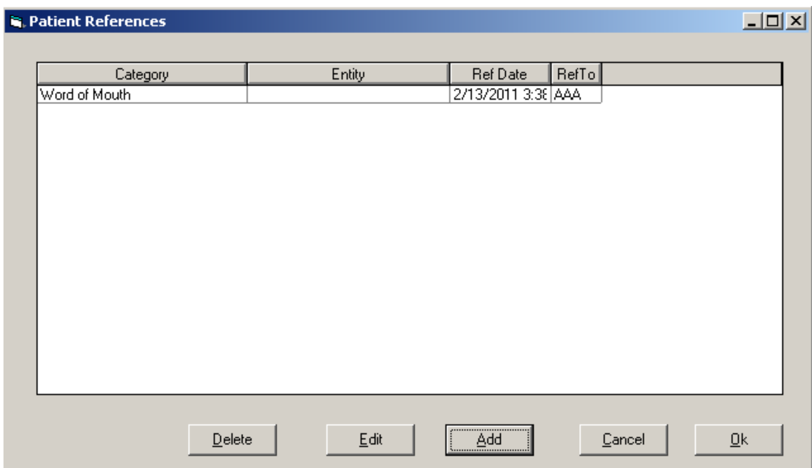
To add a reference:

-in the Ref Category field, use the drop down that fits the category most applicable. The example above is Word of Mouth.

-in the Ref To field, use the drop down to find the initials of the practitioner or nurse that the patient was referred to. The example above is a doctor with the initials AAA.

-there is also a Comments field to add any other pertinent information regarding the reference made.

-when finished click **OK** and it will bring you back to the previous window as shown below:



To edit a reference

-in order to edit, highlight the reference by clicking on it.

-then click the **Edit** button.

-after you hit the edit button, it will bring up Patient Reference window where you can change the created the reference.

-in this window, navigate through the drop-downs of Ref Category, Ref To, and Ref Entity to change current selections. These fields were previously described in the 'add a reference' instruction above.

-once finished, click **OK**. This will bring you back to the previous Patient References window.

-click **OK** here and it will bring you back to the Patient Details window.

To delete a reference:

-in order to delete, highlight the reference by clicking on it.

-then click the **Delete** button. Click **Yes** at the prompt.

-reference will be deleted, then hit **OK** to exit and return to the Patient Details window.