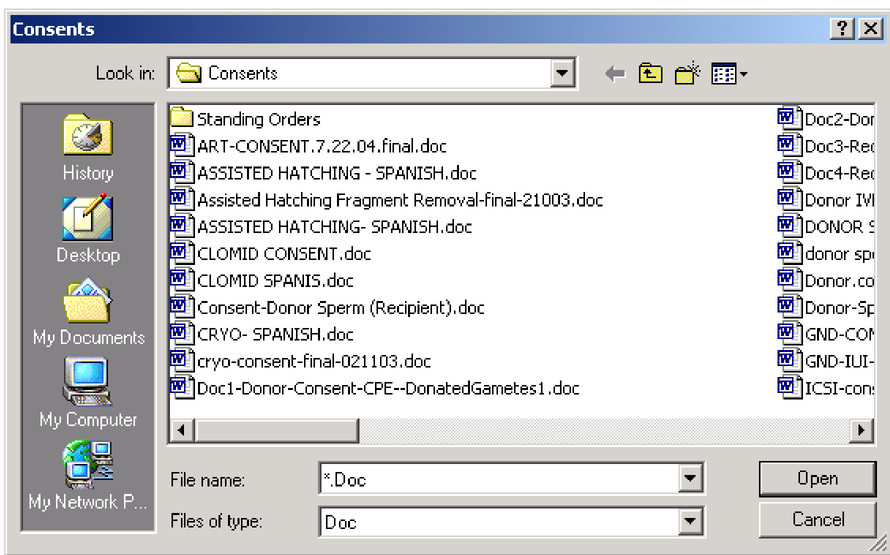
Within RESource there are routine reports that can be run on a daily basis as well as reports that are accessed on an as-needed basis. Routine reports can show you the patients who are expected in for given procedures/lab work, as well as allow you to print out labels for various needs. Most report and label options are available under Reports in the Main Menu.

Consents

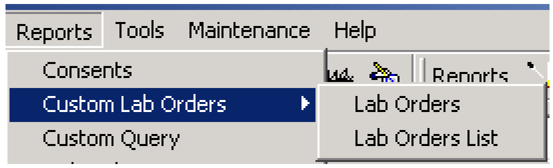
The Consents option in the Reports menu is mapped to a location/directory in the shared drive. When selected it will display the folder where the clinical related consents used by the practice are saved.



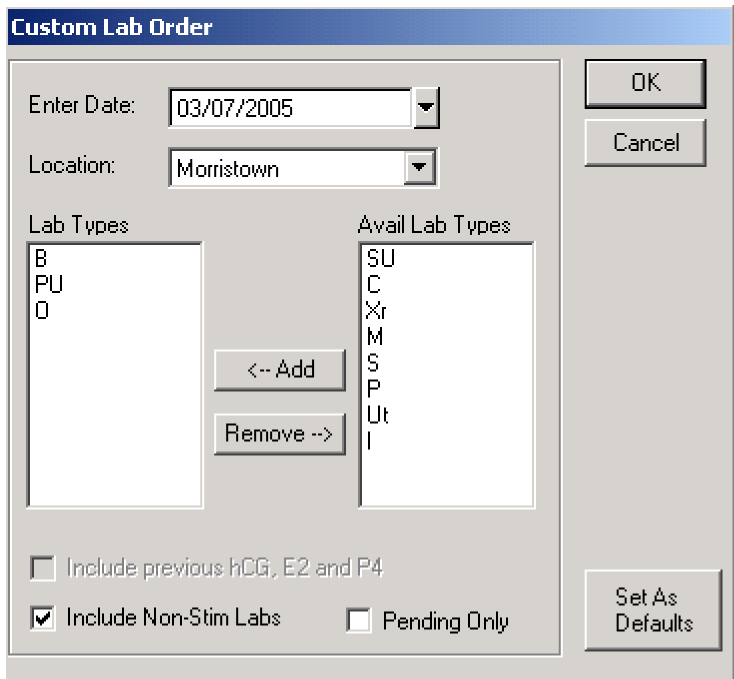
The purpose of this is to allow staff to access the consents and print them out as needed. Selecting a consent in this folder has no effect on a patient's chart/cycle. To print out a consent, select it and click Open – the consent will appear as a Word document, which you can then print (using the File menu for the document).

Custom Lab Orders

Selecting Custom Lab Orders from the Reports menu allows you to select either Lab Orders or Lab Orders List. The Lab Orders option will enable you to print each individual lab order meeting the criteria entered, while the Lab Orders List will enable you to print a list of patients/orders meeting the criteria.



Upon selecting either option, a window will appear where the report criteria are defined. The criteria selected relates to specific lab order items in the stim sheets. The resultant printouts will represent all lab orders that meet the criteria entered.



To generate/print a Custom Lab Order report:

1 – select the desired stim date and stim location. Note there is an option for All Offices in the Location dropdown list.

2 – from the Avail Lab Types box on the right, select the desired order types and click Add. Any order types listed in the Lab Types box on the left will be searched for. To remove a type from the Lab Types box, select it and click Remove.

Include previous hCG, E2 and P4 – this option is currently disabled

Include Non-Stim Labs – when checked, the resultant report will include all lab orders that meet the above criteria, regardless of whether or not the individual orders contain stim labs (E2, P, FSH, LH, bHCG). If not checked, only lab orders that contain at least one stim lab, in addition to the other criteria listed, will appear as a result.

Pending Only – when checked, the resultant report will return only lab orders where results are pending (in addition to the other criteria listed). If not checked, lab orders of all statuses will be included.

3 – click OK. If running Lab Orders, all lab orders meeting the criteria will load – you will know that they are done loading when the counter at the top of the window has stopped.

If running Lab Orders List, a list of patient names will load – you will know when the report is done loading when the counter has stopped. Click Print.

The lab types available in the Custom Lab Order report feature are abbreviations that are pre-assigned to each individual lab order item in RESource. These abbreviations will also appear in the Lab column of the stim sheet when an order exists.

B – Blood work (usually refers to female blood work)

PU – Pregnancy Ultrasound

O - Other

SU – Stim Ultrasound

C - Cultures

Xr – X-Ray

M – Male lab work (blood work and/or Andrology testing)

S - Surgery

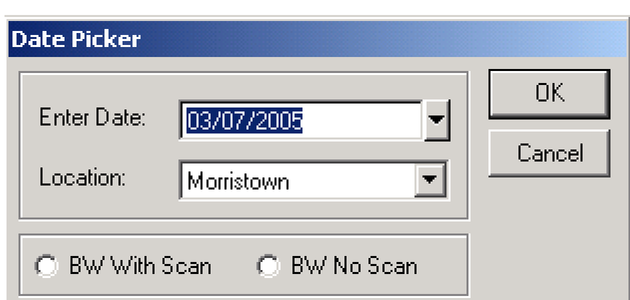
P - Procedure

Lab Orders

Different from the Custom Lab Orders, the Lab Orders option prints all lab orders for a given date – this option is used every morning to print out the day's orders.

To print Lab Orders:

1 – select Lab Orders from the Reports menu and select a date and location from the Date Picker prompt that appears



BW With Scan – selecting this option will return lab orders where an ultrasound is also ordered for the given date

BW No Scan – selecting this option will return lab orders where no ultrasound has been ordered for the given date

Selecting neither of the above two options will return all patient lab orders regardless of ultrasound order status.

2 – click OK. All lab orders meeting the criteria selected will load – you will know that they are done loading when the counter at the top of the window has stopped.

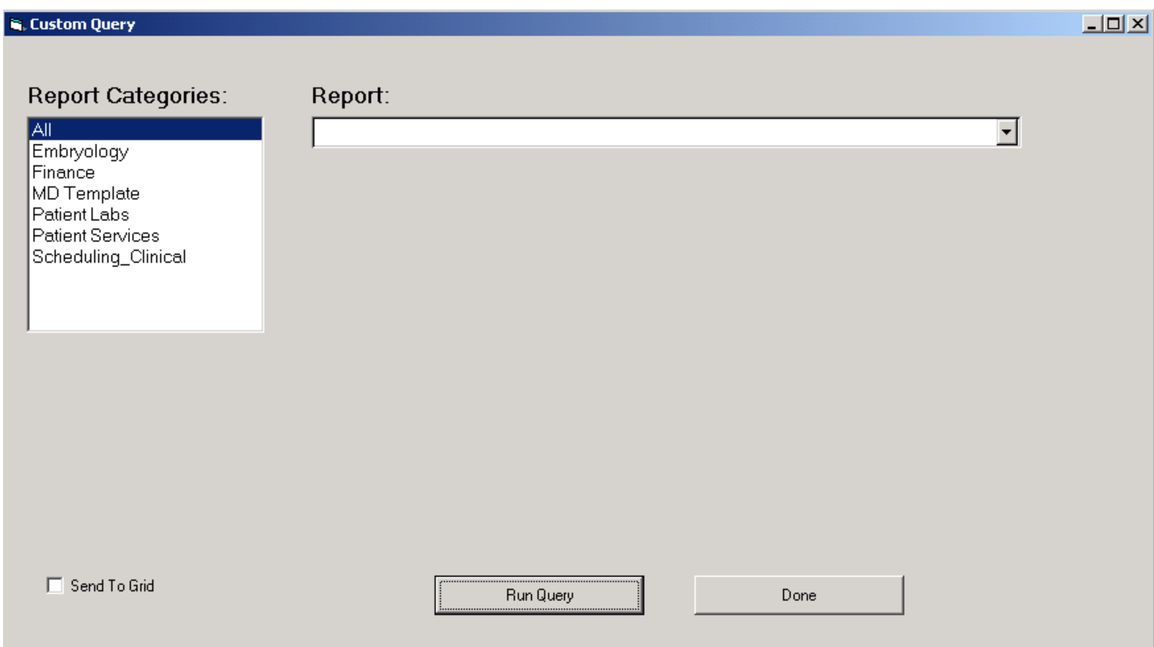
Custom Query

Custom Query reports are reports that can be created in addition to the standard reports in RESource. Custom Query reports are created by a RESource administrator upon request.

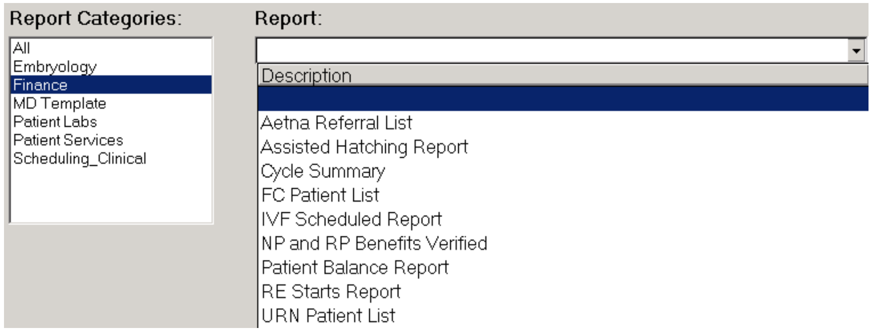
To run a Custom Query report

1 – select Custom Query from the Reports menu

2 - select the appropriate category from the Report Categories available



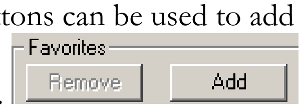
2 – select the desired custom query report from the Report dropdown. The report category selected will determine what reports appear in the dropdown.

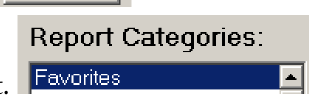


3 – upon selecting a report, parameter fields may appear. Select an option for each parameter from the dropdown list provided. If there is no 'All' option for a particular parameter (i.e. MD), in most cases leaving the option blank is the same as selecting 'All'. Double clicking on a date field will display a dropdown arrow giving you access to a calendar where you can select a date.

4 – click Run Query. A printable report will generate.

To Add Report to Favorites Category

1. The **Favorites Add/Remove** buttons can be used to add currently selected reports to your Favorites category. 

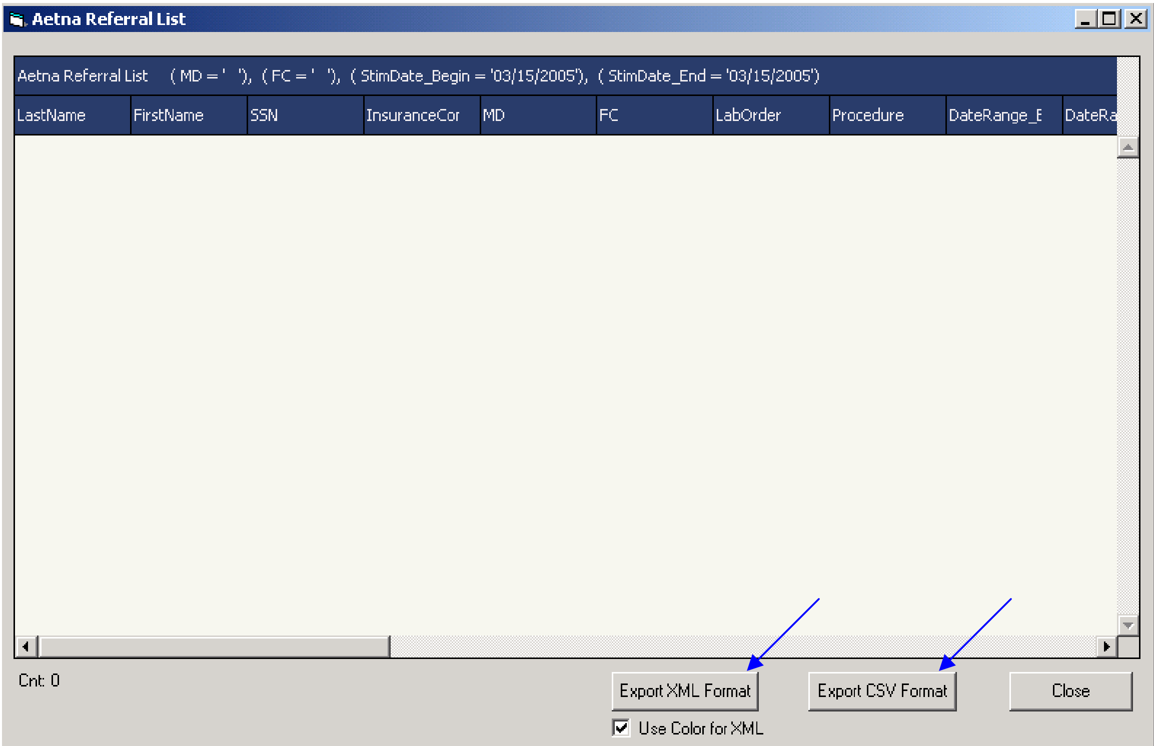
2. Added Category column to the Reports droplist. 

NOTE:
Some custom query reports may require that a patient or a cycle first be selected in the Patient Explorer. An example of this type is the Cycle Summary report in the Finance category.

- To run this type of report, select a patient/cycle in the Patient Explorer then proceed to **Reports – Custom Query** as usual.
- The patient/cycle selected becomes the criteria for the report.

If you have any questions regarding the use or the parameters of a specific Custom Query report, contact your RESource administrator.

Send to Grid – checking this checkbox displays the report results in a grid where they can then be exported in an XML (web page file) or CSV (comma delimited file) format. CSV files can be viewed via Excel. Clicking the corresponding buttons in the grid window will export the results to the location/directory you specify in the Save As window that appears.



Embryology

All Embryology reports will be discussed in the Embryology section.

Finance

All Finance reports will be discussed in the Finance section.

Hit Sheet

The Hit Sheet report supplied by RESource simply returns all patients with a Srg indicated in their stim sheet for the selected date. The report includes VOR date and ET date according to the stim sheet as well, but does not allow any (time) scheduling of these procedures. This report is not used at RMA.