MEETING BRAINSTORMING

Discussions:

(Please see the Spring 2012 Meeting Agenda and the Complete Meeting Presentation for a list of agenda/presentation items)

FUTURE MEETING FREQUENCY AND LOCATION
- March: Warm location to discuss upcoming releases
- September: Northeast area to discuss response to release material – with more demo and how-to presentation

SI KIOSK
- Biometrics – can we have this be the sign in mode once a fingerprint in registered (no need to enter other/multiple identifiers)?
- Use of SSN as an identifier: What about facilities that do not use SSN?
- Can we have dropdowns for the security questions? People do not know what to ask sometimes… can we have 3 default questions come up with additional choice for custom?
- Can we add ability to update insurance?
- Can we add ability to update their address, Phone and email?
- Can we have SI Note have expiration date?

GLOBAL REVIEW
Global review groups/labels so we can create specific groups of Global review
Personal/Global Review options:
1. Global
2. Global Group (Teams, depts., etc)
3. Personal

Suggestion: When in review, a way to have a pop up (like a sticky note that will show comment/ reminder for why patient is in personal, group or global review) Then once this patient is 'reviewed' – note deletes – not part of personal MR/PN.

TASK MANAGER
Possible 'Start Date' for reminding user of that task. The issue is that if a user creates a task as a way to remind himself/herself of something that needs to be done in the future, the outstanding task reminder currently pops up every day (prematurely). With a start date, the user will not get the popup reminder in the TASK alerts until this selected start date. Beneficial for when setting tasks in the future without getting the reminder every time you sign in. A filter would be needed in Task Manger to view future tasks (via check box?).

PGD in the IVF SCHEDULER
Need a way to organize or flag scheduled patients with PGD.
Med Software suggestions: use the dropdown provided in IVF Scheduler to BOLD the ones with PGD (there is the ability to group all PGD options), OR a query for the week listing patients with PGD

PATIENT SNAPSHOT
A section for a 'patient summary' or 'patient snapshot':
Needs to be customizable
Easy to display with hot key AND single click option
How many fields are necessary? Most common answer was 4
Space: Where will this fit in RESource? Can this be added to Stim dash?
Suggestions for the dropdown:
- D3's
- BMI
- Rh/ Blood Type
- AMH
- SA – morph and total motile
- Allergies

APPROVED CONTACTS
Pt Details: add 'Approved Contacts' for patients that have consented they be called on their behalf. Group Suggestion: replace Uterine Position field with this?
- Fields needed: Date, Contact Number, Name, Relationship, Comment,
- If selecting from available Partner list, default to active partner
- Need ability to list multiple individuals

LIST OF SITE OPTIONS
What available options are turned on and off for facilities?
Med Software to add list of Site Options to SPA
Topics that came up with this table:

- Med amount change in stim – red text
- Cycle dx on Rx form
- Treatment strategy to print at the top of the stim sheet
- Hiding SSN number (like ACRM)
- Checklist link (patient/partner)
- Name Change button/history

CUSTOM LETTERS

CRL/GS/YS in Preg USS letter- facilities just need to provide verbiage for template editing
Congrats and Frozen embryos to trigger a letter? This can be done like below:

- For Congratulations letter, when Deliv event is CP'd a PN can auto-generate, which you can then send as letter.
- Progress note template can be printed… facilities need to set up individually.

WISH LIST FOR ALL FACILITIES

- Link same sex charts
- Ability to retire cycle statuses
- ANY med changes to turn red, not just Amt (include Unit, Route, Interval)
- USS Measures form – "Resting Follicles" to auto-populate with value in the '10' column in stim sheet
- Alert for AMH, BMI
- Ability to retire stim types
- Attachments to print with progress notes
- Progress note: when printing progress notes, any filtered applied to the Prog Note history window should be applied to the printouts. For example, if filtered for MD notes only, then only those should print. Also, if a sort is applied then it should be applied to print order (or have a prompt at print option to 'Sort by' 'Order by')
- Retrieval letter at time of transfer – this option is greyed out in some facilities?
- IVF Summary letter - request has been made to separate Day 5 and Day 6 counts.

- User level option to set MR to print location address (Tools- Options)
- Sharing Stim Rows, USS, BW between RESource clinics. Export from one and import to another.
- Requesting to view Follicle Counter window/USS values on the 'Touch' tool. Med Software suggestion: double tap a follicle size entry cell (on stim sheet) to bring up window.
- More windows operation versatility. Example: when a new patient is selected in the Patient Explorer, refresh all open windows to this patient. Ability to have more than one window open at a time for a single pt.
- PT Details: for some clinics, when phone numbers cross bridge they end up in different phone fields. Example, ACRM: alternate phone number is populating the Business Phone field when ideally it should populate 'Other'. Discussed having customizable dropdown lists for all phone field labels.
- Cl By column in Stim Sheet: Should NOT allow another user to change the initials of user who entered initials
- Labcorp supports Hold function for only the newer installs - need upgrade installed at other facilities.
- Endometrial Thickness (ETh) to have decimal precision. Example: 10.6 not to round up and 10.2 not to round down.
- Hot key for Baseline USS/Stim USS/Preg USS
- Phone and DOB lookup as a custom query choice in Patient Explorer
- Font size increase for 'Reminders' window
- Need solution to allow flagging of pts when: 1) single female using donor sperm 2) same sex couples
- Option to hide SSN and replace with Patient ID
- Need solution for GND meds that do not require AM/PM columns. Med Software suggestion: possibly create a new med type for 'Daily Gonadotropin'. This would need to be included in total Gnd counts for ART reporting though.
- When creating a new cycle, the options to Copy Options and to copy Stim Meds should be available if new cycle is of same cycle type of previous cycle (ignore stim type)
- Rh factor field – option to populate from lab log?
- Need additional clarification for color/highlight assignment on Preg event (RH neg) and Allergy button (to distinguish between data not entered and a negative value):
  - Preg
    - No Rh value (not entered) = Red
    - Rh positive = Black
    - Rh negative = Pink
  - Allergy
    - No value (NKA/NKDA not checked and no allergies entered) = Red
    - Allergies = Yellow
    - NKA/NKDA checked = Black text indicator on stim
- Hot key for dashboard
- Hot key to open/close stim meds

- Hot key to open/close Chronic meds
- Ability to archive patients: hide from view vs grayed-out when patient shows in Patient Explorer.
- 'Name Change' button/history is not available for anyone present at meeting except RMA NJ – all would like
- ICD10 solution: Enhanced/smarter search functionality (to work like Google search?) needed for BOTH cycle dx and billing (superbill) dx
- Total # eggs, Total # ICSI, Total # Conv Insem on male analysis tab/ Fert tab ICSI button: Can they be "smart" (entered in one = populate the other)? See "proposed enhancements" section of agenda/presentation
- Checklist enhancements still needed (items are already in queue)
- Help menu: capability of adding a folder? Need folder path/location capability in lkupHelpFiles
- Ideally, SPA Password requirement to be ELIMINATED
- Stim Comments need to be 30% larger, or 4 lines

INDIVIDUAL FACILITY NEEDS:

RMA of Philadelphia
- Is getting run time errors with patient images
- Attachments in progress notes (images) able to move to other images
- Lab log review: pop up that record was modified by another user
- When printing MR's to PDF, default to Microsoft Office

RMA CT
- Email instructions - slow run time
- Referral SA custom letter
- Can they hide SSN like ACRM?
- Medical Records print USS not working
- Autogen progress notes on procedure
- EReq POS codes

ACRM
- Needs WHO reference values updated on SA
- Global Templates deleted – needs re-entered
- Lablog 'with Privacy' print option not working
- Alternate phone number coming across in bridge to Business Phone field – needs to go to 'other' phone field
- Requesting an 'OK' msgbox for Global and personal review to confirm selected patient is in the review list

RMA NJ
- Biometric scan in and out for exam rooms. Suggestion: when the CA comes to clean room she can reset the Biometric that the room is free