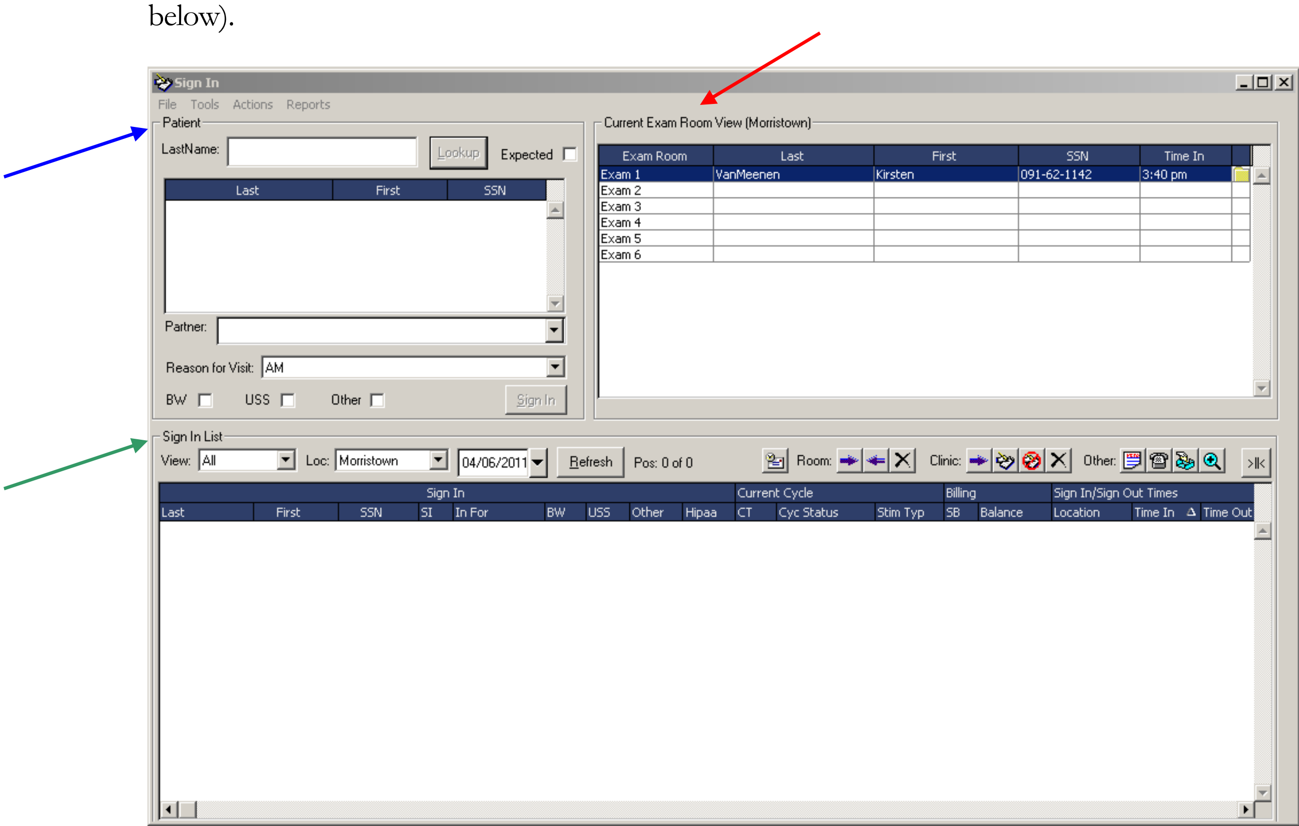
Most of the information discussed so far is captured and entered into RESource before the patient even comes in to the office - this way the patient is already established in the database when she comes in for her first appointment. When a patient arrives in the office, whether it is for a new patient consultation, follow up visit, AM monitoring, etc, the patient gets signed in to RESource. The Sign In screen can be opened via the main menu by selecting the Tools option then Sign In. On the Sign In screen you will notice a main menu and three boxed areas: Patient (blue arrow below), Sign In List (green arrow below) and Current Exam Room View (red arrow below).



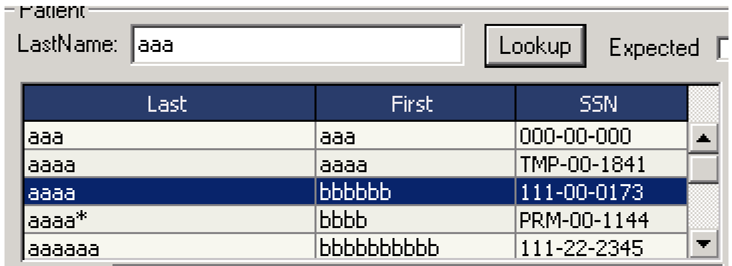
Patient

The Patient section is where you lookup a patient name, select the reason for the office visit and sign the patient in.

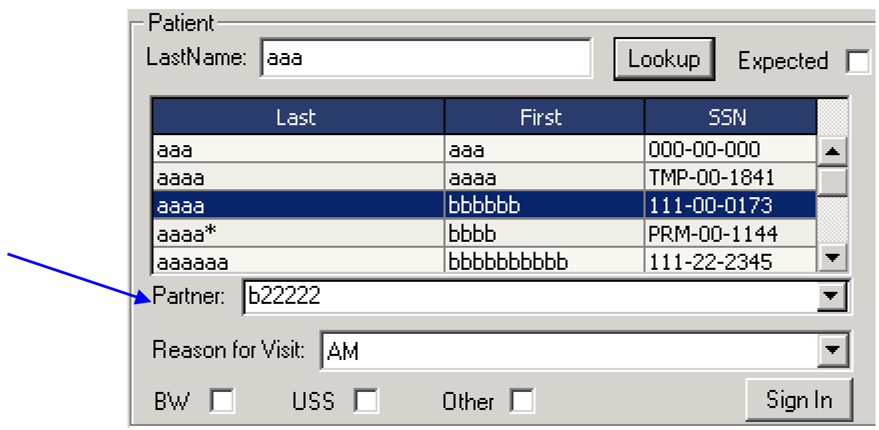
To sign in a patient:

1 – enter the patient's last name, or the first few letters of the last name (Smi for Smith), in the Last Name field and click the Lookup button

2 – a list of patients that meet the criteria entered will appear. Select the desired patient.



3 – if the patient's partner is also here for the appointment (example: both are having blood work done), select his/her name from the available options in the Partner drop down list



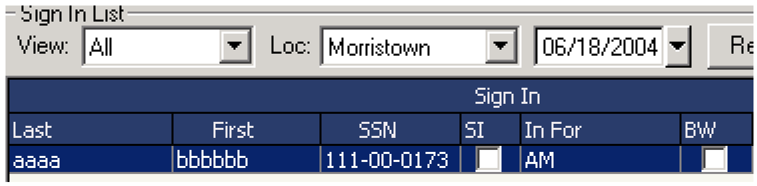
4 – select the appropriate visit reason from the Reason for Visit dropdown list.

NOTE: If there is no selection available in the 'Reason for Visit' field, please see an Administrator for setup. This is located in **Lookup Table Manager** under **Maintenance** on the main toolbar. Select the 'lkupVisitReasons' table.

There are three check boxes below the Reason for Visit dropdown: BW (blood work), USS (ultrasound), and Other. If the reason for visit is 'AM' (AM monitoring) then you also want to check off any of these check boxes that apply.

5 – **click** the Sign In button

6 – the patient will appear in the Sign In List (with all other patients that have been signed in for the selected location and date)



Expected

The Expected check box, next to the Lookup button, can be used to search for patients who have scheduled appointments for the day but have not yet signed in. This feature will only work if you are scheduling patients in the RESource patient scheduler. Assuming there are patients scheduled in the scheduler, check off the Expected check box and click the Lookup button. A list of patients expected in to the office will appear – you can then select one and sign her in as you normally would.

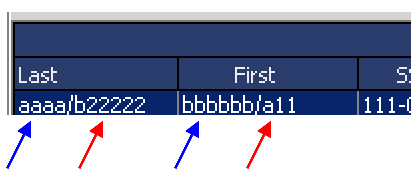
Sign In List

Once a patient has been signed in, she will appear in the Sign In List. You will notice that not only her name appears, but also included is her social security number, reason for visit, corresponding cycle information, and sign in/sign out times.

Column definitions:

- **Last** – last name. If the partner was signed in along with the patient then you will notice two names, with the partner being the one after the forward slash.

- **First** – first name. If the partner was signed in along with the patient then you will notice two names, with the partner being the one after the forward slash.



(blue arrows point to patient name, red arrows point to partner name)

- **SSN** – social security number

- **SI** – Special Instructions. When checked, a special instruction exists for the patient. Special Instructions are explained in "Sign In Actions", later in this section.

- **In For** – reason for visit

- **BW** – blood work. When checked, the BW checkbox was selected upon signing in the patient.

- **USS** - ultrasound. When checked, the USS checkbox was selected upon signing in the patient.

- **Other** – the other category associated with the BW and USS checkboxes (can be used to indicate cultures, etc). When checked, the Other checkbox was selected upon signing in the patient.

- **Hipaa** – reflects the status of the Hipaa Docs checkbox in the Patient Details screen (checked vs. unchecked). If the partner has been signed in with the patient, this column will reflect the status of the Hipaa Docs checkbox in the Partner screen.

- **CT** – the Cycle Type of the patient's active cycle

- **Cyc Status** – the Cycle Status of the patient's active cycle

- **Stim Typ** – the Stim Type of the patient's active cycle

- **SB** – indicates if a super bill has been entered for the given day. When highlighted **maroon**, the bill has not been reconciled.

- **Balance** – the outstanding balance owed by patient (this will be the same value that is displayed in the Balance field in Patient Details). This figure is automatically transferred over from the billing system, and will be **red** if the balance is greater than $500.

- **Location** – the sign in location

- **Time In** – the time the patient was signed in

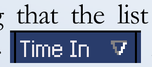
- **Time Out** – the time the patient was signed out

- **LWS** – indicates the patient left without signing out

- **Room** – the exam room number that the patient has been signed in to

- **In Room** – the time the patient was signed in to the exam room

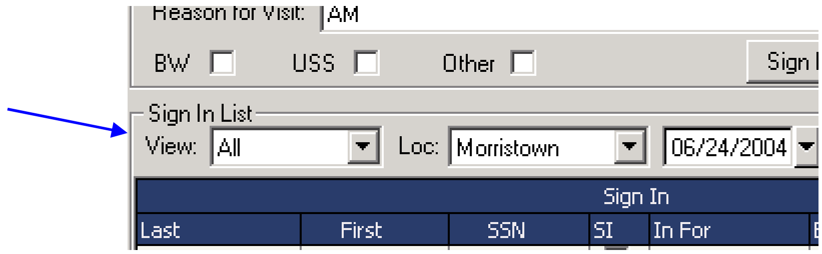
- **Out Room** – the time the patient was signed out of the exam room

Remember, several RESource grids (tables) have the ability to change sort order and column width. To activate a sort, left mouse click on the column header you would like to sort on. Clicking the column header again will reverse the sort. The Sign In List can be sorted by any of its columns. A triangle arrow will appear next to the column header, indicating that the list is being sorted by that column – a downward facing arrow indicates descending order 

and an upward facing arrow indicates ascending 

. The default sort is on the Time In column, in descending order. Each column width can also be adjusted by moving the cursor over the rightmost side of the column, at the column heading – the cursor will change from a pointer to a cross. When the cursor becomes a cross, hold down a left mouse click and move the mouse to the left or the right to re-size the column. You also have the option to shrink the Sign In grid by choosing Contract Table from the Tools option in the Sign In main menu, or by clicking on . When contracting the table, the Hipaa, CT, Cyc Status and Stim Type columns are hidden. To re-expand the table, choose Expand Table from the Tools option in the Sign In main menu, or click on . Note that when you close the Sign In window, any changes made to the sort order and/or column widths will not be saved.

Within the Sign In Table you can filter the sign in list according to BW and USS status, location and date. You will notice a section of drop down options and icons directly above the column headings just discussed. The drop down options allow you to select criteria for your Sign In view.



<u>Available options</u>

- **"View" dropdown:**

  All – this is the default setting – view all sign in records

  BW – limits records to only those that have BW checked off

  USS – limits records to only those that have USS checked off

  Need BW – limits records to only those that have BW checked off, but have not yet had their blood work marked as Drawn

  Need USS – limits records to only those that have USS checked off, but have not yet been signed into a room

- **"Loc" dropdown –** if the practice has multiple office sites, you can use this to view other locations' Sign In for the day. Sign In defaults to the office you are logged in at. Note that you can only sign patients in for the office location you are currently at.

- **Date field** – allows you to view Sign In from a previous day. Note that you cannot make any changes to previous or future Sign Ins.

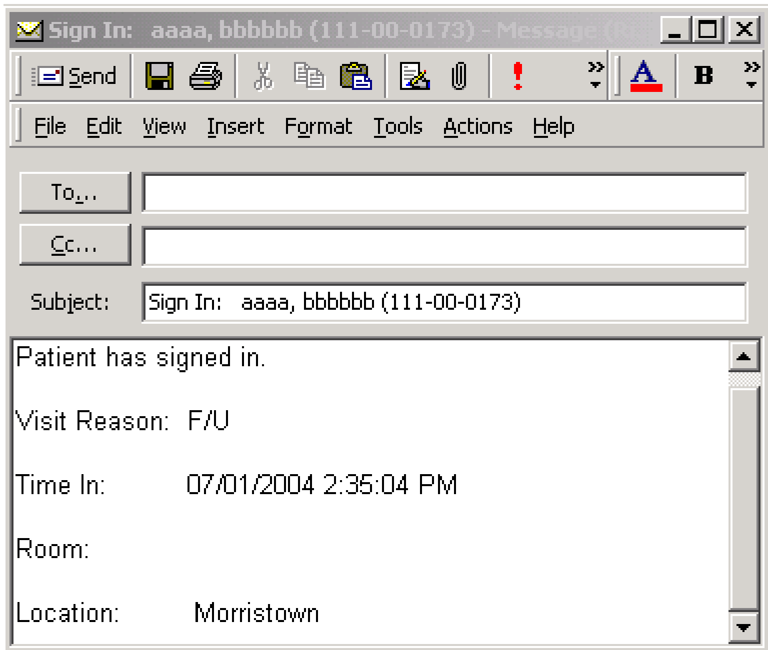
Sign In Actions

Each icon along the top of the Sign In List represents an action. Besides using the icons, you can also right mouse click, while in the sign in grid, to show a pop up menu or you can go to the Sign In main menu and select Actions – all lists are the same. An action can be selected by going to either of these lists or by clicking on the corresponding icon. The action will be applied to whatever row/patient you have selected in the list (highlighted in **blue).**

- **Refresh** 

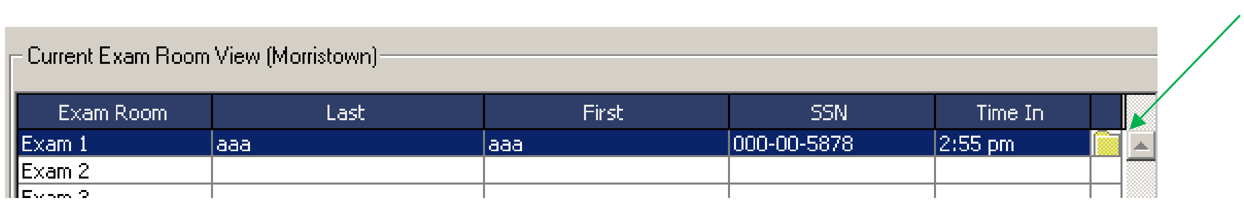
 - manually refreshes the Sign In screen. The screen, by default, refreshes every 60 seconds.

- **E-mail** - brings up a new email message with the selected patient's name and social security number in the Subject line. The body of the email will automatically be generated and will include the Visit Reason, Time In, Room and Location. Use this to notify the appropriate individuals that the patient is here for her appointment.



- **Sign In Room** - signs the patient into an exam room. A prompt will appear allowing you to select which room number you would like to sign in to.

Once signed in to a room, the patient will appear in the Current Exam Room View section.



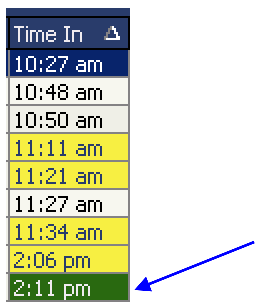
The In Room time will be recorded in the patient's record in the Sign In List.

TIP: The manila folder icon (green arrow above) gives quick access to this patient's information. Double clicking the icon brings up the main REsource page in another window with the patient's record populated in Patient Explorer.

- **Sign Out Room** - removes the patient from the exam room she is signed in to and records the Out Room time

- **Remove From Room** - removes the patient from the exam room she is signed in to without giving her an Out Room time. By removing the patient from the room, you also remove the In Room time. You would use this option if you accidentally signed a patient in to a room.

- **Received** - indicates that the patient has been removed from the waiting area and taken to the clinical area/doctor's office for her appointment. When Received is selected, the Time In field becomes highlighted in green.



The Time In field is color-coded using 3 different colors – each color represents a patient status within Sign In:

Yellow - When a patient is signed in, the Time In field will be highlighted in yellow. A status of yellow indicates that the patient is in the waiting area and has not yet been taken to the clinical area/doctor's office for her appointment.

Green – Upon selecting 'Received' from the Actions menu, the Time In field becomes highlighted in green. This indicates that the patient has been removed from the waiting area and taken to the clinical area/doctor's office for her appointment.

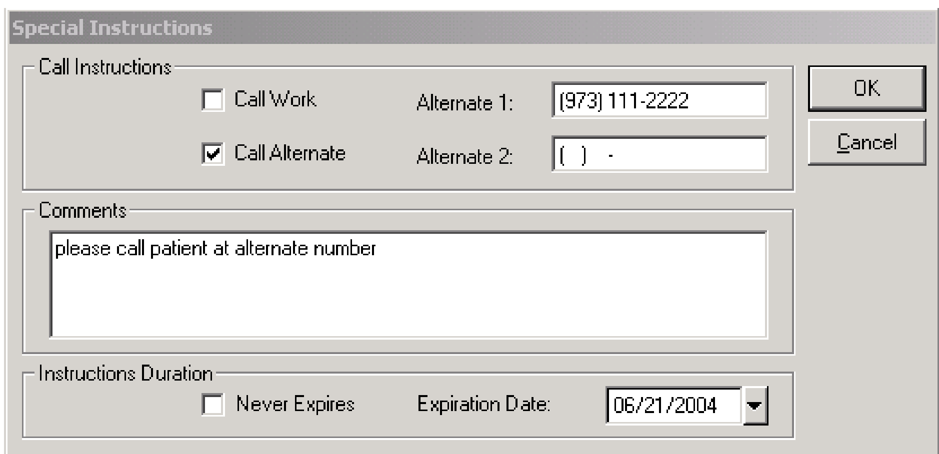
White/Gray – The Time In field returns to normal (no highlighting) when the patient has signed out.

- **Sign Out** - used to indicate that the patient has signed out. The Time Out will be recorded in the Sign In List. When Sign Out is selected, the current highlight (either yellow or green) on the Time In field will disappear (and return to a white/gray background).

- **Left Without Signing** - used to indicate that the patient left without signing out. The corresponding checkbox in the LWS column will become checked.

- **Remove Sign In** **-** removes the patient from the Sign In List. You would use this option if you signed in an incorrect patient. Note that you can only remove a sign in record from the current day – you cannot select a previous date's Sign In and remove a patient.

- **Special Instructions** - used to indicate that a patient has special instructions regarding contacting her. For example, she would like to be called at an alternate phone number with her results/instructions for the given day. When selected, a window will appear allowing you to enter alternate phone numbers and/or comments. Special instructions, by default, expire at the end of the day they were created. You have the option to change the expiration date or check off Never Expires – you will notice these options at the bottom of the Special Instructions window.



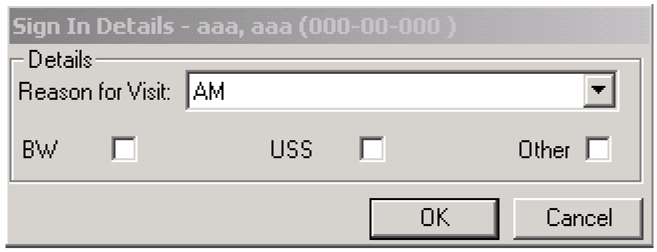
When a patient has special instructions entered, it will be indicated in two locations in RESource:

1 - the SI column in the Sign In List will be checked off (automatically)

AND

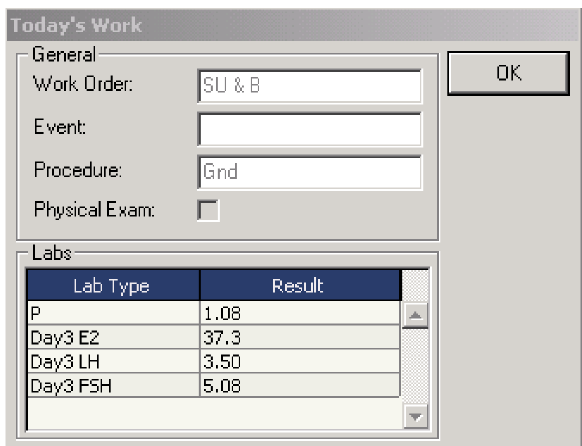
2 - when the patient is brought up in the Patient Explorer, her folder (to the left of patient name) will have an exclamation mark in it

- **Details** - allows you to edit the Reason for Visit if a patient was signed in incorrectly. A small window appears where you can change the reason for visit and/or check off BW, USS, and/or Other, if applicable.



- **Super Bill** - brings up the patient's super bill history and allows you to generate a new bill for the patient's visit. When a bill is entered for a patient, for that day's visit, the SB column in the Sign In List will become checked off (automatically). Super bills will be discussed in detail in the Finance section.

- **Today's Work** - shows you the labs, ultrasound, events, and/or procedures that the patient is scheduled to have that day, according to her stim sheet. Specific labs to be done are listed in the bottom half of the window.



Today's Work can be used when generating a super bill as it displays what to bill for.

- **Expand** - expands the Sign In view to show all columns

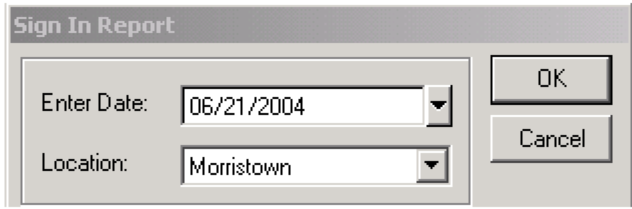
- **Contract** - contracts the Sign In view to hide the Current Cycle columns

Main Menu

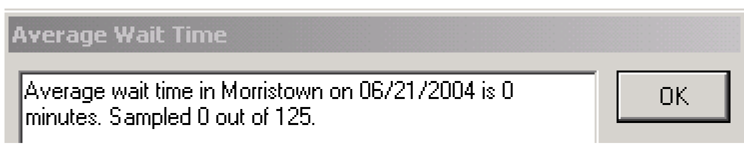
In the Sign In screen, there are four main menu options: File, Tools, Actions and Reports. Most of the items in the File, Tools and Actions menus were already discussed in "Sign In Actions".
The Report option contains three reports relating to Sign In:

- **Sign In Report** – prints out the Sign In List for the date and location selected. After selecting the date and location when prompted, click OK -

the report will appear. To print it out, select the Print button in the upper left hand corner of the report.



- **Average Wait Time** – displays a message stating the average amount of time a patient is waiting to be seen that day. It is calculated by taking the difference between the Time In time and the time the patient is marked as Received.



- **Average Appt Duration** – displays a message stating the average appointment duration for the day. A prompt will appear that allows you to select what Reason for Visit you would like to see results for – select a reason from the dropdown list. The duration is calculated by taking the difference between the Time In and the Time Out.