# Managing patients (Guide)

As a resupply user, client services representative (CSR) or solutions delivery specialist (SDS), the patient profile is where you can view and edit patient details and associated information.

You can view or update the patient profile through available functions:

- Patient details—view and edit basic details.
- Supplies—view resupply opportunities and update supplies.
- **Documents**—upload, download and delete patient documents.
- Notes—create notes.
- Timeline—view a list of all the past actions performed e.g., updated patient profile or logged in to ResMed ReSupply.
- Supply requests—view and edit supply requests.

Note: The functions available to a user are determined by their role.

# Working with patient profiles (Topic)

The patient profile displays all the available patient information in your organization.

To view a patient profile:

- 1. From the Patients menu, select All patients.
- 2. Select the patient name from the list.
- 3. Click the preferred link to view details:

#### Patient details

**Supplies** 

**Documents** 

**Notes** 

**Timeline** 

Messages

Supply requests

Work items

## Patient details (Topic)

You can modify, add or delete data from a patient profile.

#### Updating payor details (How to)

You can modify, add or delete payor details from a patient profile.

### To edit payor details:

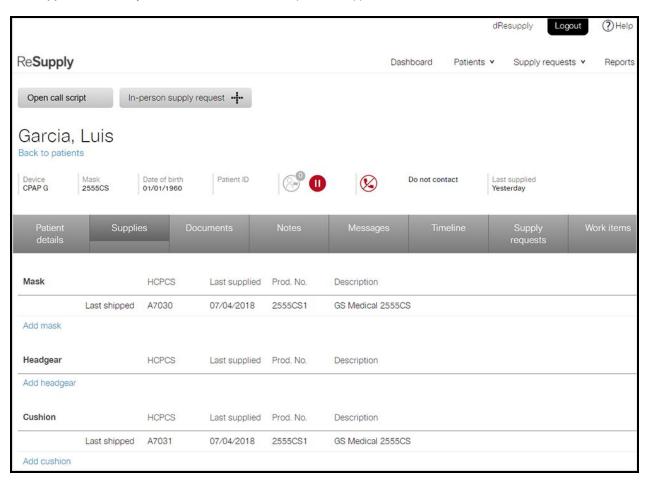
- 1. From the Patients menu, select All patients.
- 2. Select the patient name from the list.
- 3. Click the Patient details link.
- 4. From the **Patient details** tab, click **Edit** under **Payor details**.
- 5. Enter all necessary information—payor and member ID.
- 6. (Optional) If you want to update the patient's insurance status, select **Verify insurance** and then click **Yes, verify** insurance

**Note**: If you activate this feature, additional service fees will apply. Insurance verification can take up to 24 hours. Once the status is known, it is displayed under Last known status.

7. Click Save.

# Supplies (Topic)

The **Supplies** tab allows you to view, add and delete the patient's supplies.



<sup>\*</sup> Patient identities and data are fictional.

**Note**: A supply item cannot be edited. If you noticed there is a mistake, you can delete the supply item and add it again with the correct information.

### Updating supplies (How to)

You can add or delete a patient's supplies from a patient profile.

#### To add supplies:

- 1. From the Patients menu, select All patients.
- 2. Select the patient name from the list.
- 3. Click the **Supplies** link.
- 4. Find the item you want to add and click Add [your item].
- 5. Enter all necessary information—HCPCS code, last supplied date and description.
- 6. Click Save.

### To delete supplies:

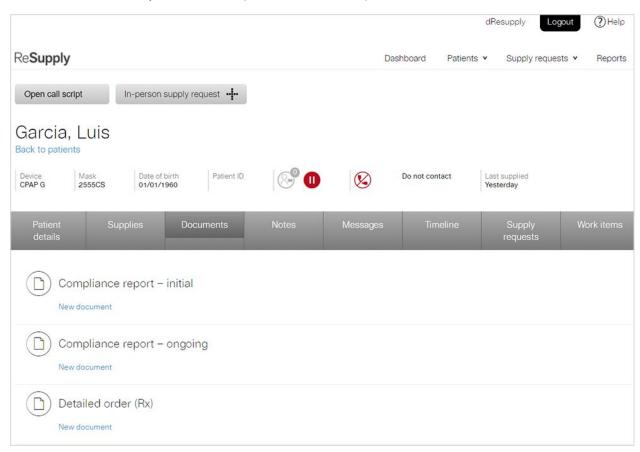
- 1. From the **Patients** menu, select **All patients**.
- 2. Select the patient name from the list.
- Click the Supplies link.
- 4. Next to the item you want to delete, click the X icon.

5. To confirm, click **Yes**.

Note: You cannot delete the patient's mask if it is the only mask listed.

# Documents (Topic)

The **Documents** tab allows you to download, upload, edit and delete a patient's documents.



<sup>\*</sup> Patient identities and data are fictional.

#### Name and description

Document category—identifies the type of document.

**Required document**—a document that is required by the payor.

Document title—displays the document's given title.

Date added—shows when the document was added.

Effective date—displays when the document becomes valid.

Expiry date—shows when a document is no longer valid.

#### Adding/removing documents (How to)

You can modify, add or delete a patient's document from a patient profile.

#### To add the document:

- 1. From the Patients menu, select All patients.
- 2. Select the patient name from the list.
- 3. Click the **Documents** link.
- 4. From the **Documents** tab, click **New document** under the appropriate document category.
- 5. Click **Browse for document** and select the document you want to upload.

Note: You cannot upload files over 10 MB.

- 6. Enter all necessary information—document name, document category, effective from and expiry.
- 7. Click Save.

#### To edit the document:

- 1. From the Patients menu, select All patients.
- 2. Select the patient name from the list.
- 3. Click the **Documents** link.
- 4. From the **Documents** tab, click the document's title under the appropriate document category.
- 5. Click Edit.
- 6. Enter all necessary information—document name, document category, effective from and expiry.
- 7. Click Save.

#### To delete the document:

- 1. From the Patients menu, select All patients.
- 2. Select the patient name from the list.
- 3. Click the **Documents** link.
- 4. From the **Documents** tab, click the document's title under the appropriate document category.
- 5. Click **Delete** and confirm.

## Notes (Topic)

The **Notes** tab assists in gathering information from patients and recording it in ResMed ReSupply. You can add relevant notes to a patient profile.

### To add new notes:

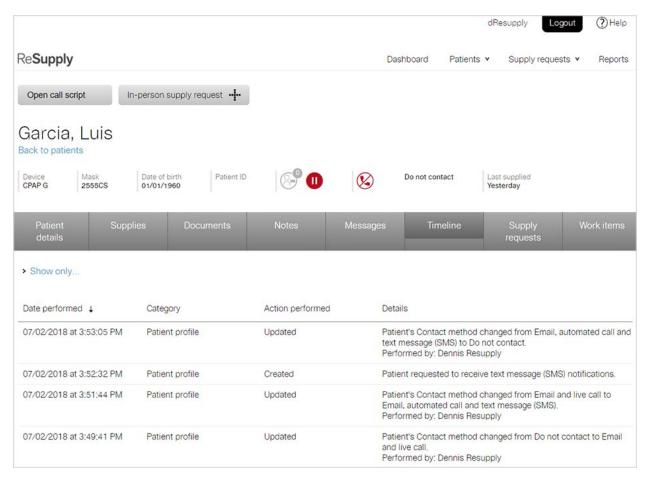
- 1. From the Patients menu, select All patients.
- 2. Select the patient name from the list.
- 3. On the Notes tab, click Add note.
- 4. Enter relevant patient information.

Note: A 500-character limit (including spaces) is set for each note.

- 5. (Optional) Click the red flag icon to flag the patient profile.
- 6. Click Save.

# Timeline (Topic)

The **Timeline** tab assists in tracking all activity associated with a patient profile. Actions performed by a patient, organization administrator, resupply user, client services representative (CSR), solutions delivery specialist (SDS) and ResMed ReSupply are all recorded and can be viewed in the Timeline.



<sup>\*</sup> Patient identities and data are fictional.

## Name and description

Date performed—shows the time and date when an activity was recorded.

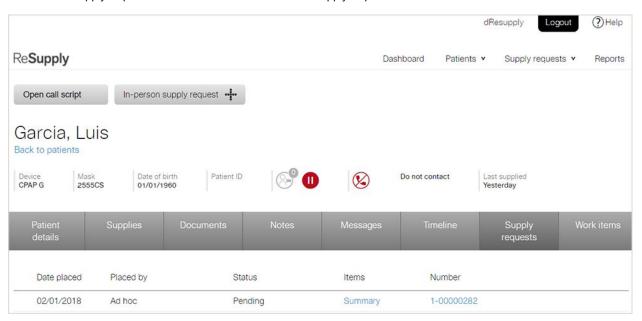
Category—identifies the type of activity that occurred.

Action performed—shows the action performed by a user.

**Details**—provides a summary of who performed the action and displays the current status.

# Supply requests (Topic)

The **Supply requests** tab assists in tracking all supply requests associated with a patient profile. Individual supply requests in addition to supply request summaries can be viewed in the supply requests list.



#### Name and description

Date placed—shows when the supply request was placed.

Placed by—identifies how the supply request was placed.

Status—shows the current status of the supply request.

Items—displays a summary/list of products in the supply request that includes quantity of items, HCPCS, product number and replacement reason.

Number—shows a unique number that identifies the supply request.

### Viewing supply requests (How to)

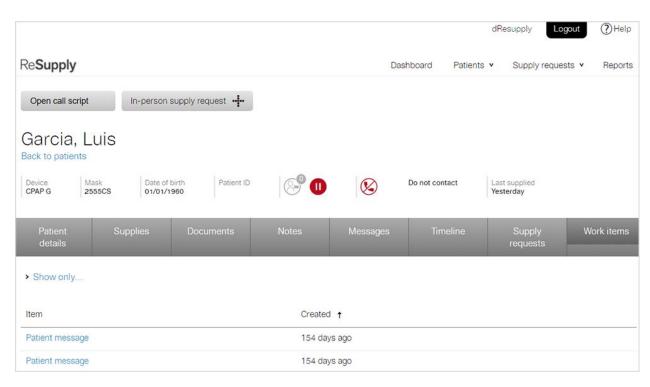
You can view a patient's supply requests from a patient profile.

#### To view the supply requests:

- 1. From the Patients menu, select All patients.
- 2. Select the patient name from the list.
- 3. Click the Supply requests link.
- 4. (Optional) to view individual supply requests, click the supply request number in the Number column.

# Work items (Topic)

The Work items tab allows you access and close work items associated with a patient.



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