

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.

The screenshot shows the ReSupply interface for a patient named Luis Garcia. At the top, there are navigation links for Dashboard, Patients, Supply requests, and Reports. Below this, there are buttons for 'Open call script' and 'In-person supply request'. The patient's name 'Garcia, Luis' is displayed, along with a 'Back to patients' link. Patient details include Device (CPAP G), Mask (2555CS), Date of birth (01/01/1960), Patient ID, and a 'Do not contact' status. A navigation menu at the bottom includes Patient details, Supplies, Documents, Notes, Messages, Timeline, Supply requests, and Work items. The main content area shows a table of supplies with columns for Mask, Headgear, and Cushion. Each category has a table with columns for HCPCS, Last supplied, Prod. No., and Description. Two rows of supply data are visible for Mask and Cushion.

Mask	HCPCS	Last supplied	Prod. No.	Description
Last shipped	A7030	07/04/2018	2555CS1	GS Medical 2555CS

Headgear	HCPCS	Last supplied	Prod. No.	Description
Add headgear				

Cushion	HCPCS	Last supplied	Prod. No.	Description
Last shipped	A7031	07/04/2018	2555CS1	GS Medical 2555CS

[Add cushion](#)

* 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.
3. 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.

The screenshot shows the ReSupply interface for a patient named Luis Garcia. At the top right, there are links for 'dResupply', 'Logout', and 'Help'. Below this is a navigation bar with 'Dashboard', 'Patients', 'Supply requests', and 'Reports'. The main content area has two buttons: 'Open call script' and 'In-person supply request'. The patient's name 'Garcia, Luis' is displayed with a 'Back to patients' link. Below the name is a row of patient information: Device (CPAP G), Mask (2555CS), Date of birth (01/01/1960), Patient ID, a notification icon, a red 'no' icon, 'Do not contact', and 'Last supplied Yesterday'. A horizontal menu below this contains 'Patient details', 'Supplies', 'Documents' (which is selected), 'Notes', 'Messages', 'Timeline', 'Supply requests', and 'Work items'. The 'Documents' section lists three items: 'Compliance report - initial', 'Compliance report - ongoing', and 'Detailed order (Rx)', each with a 'New document' link.

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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.

The screenshot shows the ReSupply interface for a patient named Luis Garcia. At the top, there are navigation links for 'dResupply', 'Logout', and 'Help'. Below this, the 'ReSupply' logo is on the left, and 'Dashboard', 'Patients', 'Supply requests', and 'Reports' are on the right. Two buttons are visible: 'Open call script' and 'In-person supply request'. The patient's name 'Garcia, Luis' is displayed, with a link 'Back to patients'. Below the name, patient details are shown: Device (CPAP G), Mask (2555CS), Date of birth (01/01/1960), Patient ID, and a 'Do not contact' status. A 'Last supplied Yesterday' indicator is also present. A navigation bar at the bottom of the patient profile includes tabs for 'Patient details', 'Supplies', 'Documents', 'Notes', 'Messages', 'Timeline' (which is selected), 'Supply requests', and 'Work items'. Below the navigation bar, there is a 'Show only...' dropdown and a table of activity.

Date performed ↓	Category	Action performed	Details
07/02/2018 at 3:53:05 PM	Patient profile	Updated	Patient's Contact method changed from Email, automated call and text message (SMS) to Do not contact. Performed by: Dennis Resupply
07/02/2018 at 3:52:32 PM	Patient profile	Created	Patient requested to receive text message (SMS) notifications.
07/02/2018 at 3:51:44 PM	Patient profile	Updated	Patient's Contact method changed from Email and live call to Email, automated call and text message (SMS). Performed by: Dennis Resupply
07/02/2018 at 3:49:41 PM	Patient profile	Updated	Patient's Contact method changed from Do not contact to Email and live call. Performed by: Dennis Resupply

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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.

The screenshot shows the ReSupply interface for a patient named Luis Garcia. At the top right, there are links for 'dResupply', 'Logout', and 'Help'. Below this is a navigation bar with 'Dashboard', 'Patients', 'Supply requests', and 'Reports'. The main content area includes buttons for 'Open call script' and 'In-person supply request'. The patient's name 'Garcia, Luis' is displayed with a 'Back to patients' link. Below the name are fields for 'Device' (CPAP G), 'Mask' (2555CS), 'Date of birth' (01/01/1960), and 'Patient ID'. There are also icons for a person, a red 'X', and a red 'P' (Do not contact), along with a 'Last supplied' field showing 'Yesterday'. A horizontal menu below these fields includes 'Patient details', 'Supplies', 'Documents', 'Notes', 'Messages', 'Timeline', 'Supply requests', and 'Work items'. The 'Supply requests' tab is active, showing a table with the following data:

Date placed	Placed by	Status	Items	Number
02/01/2018	Ad hoc	Pending	Summary	1-00000282

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.

dResupply **Logout** [? Help](#)

ReSupply Dashboard Patients ▾ Supply requests ▾ Reports

Open call script In-person supply request

Garcia, Luis

[Back to patients](#)

Device CPAP G	Mask 2555CS	Date of birth 01/01/1960	Patient ID		Do not contact	Last supplied Yesterday
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Patient details	Supplies	Documents	Notes	Messages	Timeline	Supply requests	Work items
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[> Show only...](#)

Item	Created ↑
Patient message	154 days ago
Patient message	154 days ago

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