Managers and Section Admins

Slide 1 - Welcome

Slide notes: Welcome to the GDSP Managers and Section Admins course.

Click the Begin Course button or press Enter on your keyboard to start.

Slide 2 - Course Navigation

Slide notes: You can use the following buttons in the player to navigate this course.

- Click the Rewind button to replay a slide.
- Click the Pause/Play button to pause the slide or to play the paused slide.
- Click the Back button to return to the previous slide.
- Click the Forward button at the end of each slide to move on to the next slide.
- Click the Mute button to mute the audio and then turn it back on, if required.
- Click the Closed Captioning button to view closed captions of the narrative audio.
- Click the Exit button to exit from the course.

You can also view completion status of the topics in the Table of Contents.

Please note at the end of each lesson, there will be a knowledge check to be completed before advancing to the next lesson.

Slide 3 - Course Introduction

Slide notes: The GDSP Managers & Section Admins course provides an overview of the core day-to-day activities for GDSP Managers and Section Admins.

While a specific functionality in SIS depends on user security accesses, this course introduces the common functionalities available to GDSP superusers.

Slide 4 - Learning Objectives

Slide notes: On completion of this course, you will be able to:

- Identify, create, view, and modify Entities.
- Manage Patient and Case records
- Navigate the Specimen records and utilize the list views to complete specific tasks such as add services, edit records, refer specimens, assign to CCC40, and update adequacy codes.

Slide 5 - Learning Objectives (Cont'd)

Slide notes:

- Navigate the Appointment records and utilize the list views to complete specific tasks such as monitoring appointments.
- Navigate to the TRFs and filter the list views to create new eTRFs and assign new specimen adequacy codes.
- View, access, edit, and export a variety of reports including BI reports.

Slide 6 - Entity Management Lesson Objectives

Slide notes: Welcome to the Entity Management lesson.

At the end of the lesson, you will be able to Identify, create, view and modify Entities.

Slide 7 - Introduction to Entity Management

Slide notes: The Entity Management application is used to manage different entities that are involved in the PNS program.

An Entity is an organization or an individual that is part of the program and has specific roles in it.

The following entities are available for management in SIS:

- PDCs
- CCCs
- NAPS, cfDNA, Cytogenetic, and Cytogenomic Labs
- Persons or non-users, clinical persons that are actively providing services
- Clinicians
- Facilities which are Clinicians practice locations

Please note: If Clinician or Clinician Contact entities are created in CalGenetic Portal, they cannot be modified in SIS by any user.

Slide 8 - Entity Management Application

Slide notes: The management process is the same for all the listed entities. Managing users, individuals that log in to SIS and interact with the application, is a different process and will be covered later in the training. For the purposes of this training, we will use PDCs as the example, but remember this process is the same for:

- CCC
- Lab
- Person
- Clinician
- Clinician Contact Entity Management

Slide 9 - Navigate to Entity Management

Slide notes: You have access to a dedicated Entity Management application.

- To access the app, select the Entity Management app tile from the application selection screen.
  Alternatively, if you are currently working in a different app and need to change apps, click the title of the app you are currently working from. You will be redirected to the application screen to select the Entity Management app.
- Upon selecting, you will land on the Clinicians list view.

Slide 10 - Entity List Views

Slide notes: Available list views will be determined by the entity you are managing.

1. Select PDCs from the Left Navigation menu. You will land on the Prenatal Diagnosis Centers list view, which is the default view.
2. Use the dropdown arrow to toggle between different list views.

Slide 11 - View and Modify Records

Slide notes: Perform the following steps to view and modify records:

1. Either double click the row or click the name of the PDC to select a PDC entity record
2. Select a PDC entity record to view or edit the information, such as the address, to ensure that the record is kept up to date.
3. Click Save & Close on the page ribbon to save the changes.

Slide 12 - View and Modify Entity Address Details: Demonstration

Slide notes: Let us see how to view and modify Entity Address Details in SIS 2.0.

1. In a PDC record, scroll down the page to view the associated PDC addresses in Address grid.
2. Click an existing address record in the Address grid. You will be redirected to the PDC address record.
3. You can edit unlocked fields in this record
4. Navigate back to the PDC record to create a new address record.
5. Click the New PDC address button on the PDC address grid.
6. Enter the required information.
7. Click Save & Close to view the address in address grid

Slide 13 - Persons Entity Overview

Slide notes: The Persons entities that you can manage include:

- Consultative Sonologists (Default)
- Amniocentesis Practitioners
- PDC Directors
- Genetic Counselors
- Clinical Geneticists
- Transabdominal CVS Practitioners
- Transcervical CVS Sonologists

You can also update or add license information for Persons from the License grid on a Persons entity record.

Slide 14 - Create New Entity Record: Walkthrough

Slide notes: Perform the following steps to create a new entity record:

1. Click the New button from the page ribbon on either a PDC list view or a PDC entity record to create a new PDC entity record.
2. Enter the required details, identified by the red asterisks.
3. Click Save & Close on the page ribbon to save the changes.

Please note: You cannot create Clinician or Clinician Facility entities.

Slide 15 - SIS User Management: Walkthrough

Slide notes: You can manage and edit the existing SIS users via the Entity Management App. Perform the following steps to manage and edit the existing SIS users:

1. Select SIS Users from the Left Navigation menu.
2. Select the required SIS user entity record from the list.
3. Enter the required information.
4. Click Save & Close on the page ribbon to save the changes.

Slide 16 - Person Relation Record Creation: Walkthrough

Slide notes: Perform the following steps to create a Person Relation record in the Entity Management app:

1. Click the New Person Relation button on the Person Relations grid.
2. In the Person-Relationship section, enter the Person’s role, the associated PDC, and the effective start date. Include the effective end date, if known.
3. Click Save & Close to save the changes. The new connection is now established in SIS.

Slide 17 - Knowledge Check 1

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.

Which of these entities have a unique management process?

Select the correct option.

Slide 18 - General Records Lesson Objectives

Slide notes: Welcome to the General Records lesson.

At the end of the lesson, you will be able to manage Patient and Case records.

Slide 19 - GDSP Dashboard

Slide notes:

After you sign in using the steps previously covered in the SIS 2.0 General Functionality module, you will land on the Application selection window displaying the application tiles available to you.

You can click the PNS - GDSP app tile to access the landing page to begin.

Slide 20 - Types of GDSP Records

Slide notes: Records are pages in SIS with detailed information related to a specific subject. You can access the following types of records from the Left Navigation Menu:

- Patient records: Can be accessed from the selected patient's Patient Details page
- Case records: Can be accessed from the selected case's Case Record page
- Specimen records: Can be accessed from the selected specimen's Specimen page
- Appointments: Can be accessed by selecting the required appointment ID from the Appointments page
- Patient Service Records (PSRs): Can be accessed by selecting the required PSR ID from the PSRs page
- Test Requisition Forms: Can be accessed by selecting the required PNS Form number from the TRFs page.
- Special Authorizations: Can be accessed by selecting the required request ID from the Special Authorization Requests page
- Test Requisition Forms (TRFs): Can be accessed by selecting the required PNS form number from the TRFs page

Slide 21 - Patient Records

Slide notes: GDSP users will be able to navigate to and view the Patient records in SIS.

You can navigate to the Specimens list view and either select the patient's name from the list view or select the patient's name from the specimen record to navigate to the patient record.

If you know the patient's name you can also perform a global or custom search to quickly access the record.

Slide 22 - Patient Records (Cont'd)

Slide notes: Once you have selected a patient record you may view all of the information related to that patient on the summary Tab across the following grids and cards:

Patient details

Patient addresses

Cases related to the patient

Specimens related to the patient

Slide 23 - Create Patient Address: Walkthrough

Slide notes: In some cases, you may need to add or update a Patient Address. Perform the following steps to create a Patient Address record:

1. Click the patient’s hyperlinked name in the Patient Name field of a specimen record to access the patient record.
2. Click the New Patient Address button on the Patient Address grid to navigate to the New Patient Address page.
3. Complete all required fields, which are identified by red asterisks.
4. Once all fields are filled, click the Save & Close button on the top of the form.

You will now see the new address on the patient record along with the previous address. When a new address is added, the previous address will be end-dated with the start date of the new address.

Slide 24 - Case Records

Slide notes: On the case record, you can view the following sections:

- Patient Details
- Case Details
- Appointments
- Services

Slide 25 - Knowledge Check 2

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.

What are the options available to access a patient record?

Select all that apply.

Slide 26 - Specimen Records and List Views Lesson Objectives

Slide notes: Welcome to the Specimen Records and List Views lesson.

At the end of this lesson, you will be able to navigate the Specimen records and utilize the list views to complete specific tasks such as add services, edit records, refer specimens, assign to CCC40, and update adequacy codes.

Slide 27 - Specimen Records

Slide notes: Specimen records contain all the details associated with a specific specimen in SIS.

From within the GDSP application, click Specimens from the Left Navigation menu to access the Specimens page.

Slide 28 - Specimens List Views

Slide notes: There are four Specimens list views. These list views can be toggled between to complete specific work goals. The four list views are:

1. All - Specimens List View: This view displays all specimen records regardless of the specimen status. This view can be accessed by selecting All - Specimens from the dropdown icon next to the current view header.
2. CCC 40 - Specimens List View: This view displays all open specimen records that have been assigned to GDSP for further processing based on their associated adequacy codes. This view can be accessed by selecting CCC 40 - Specimens from the dropdown icon next to the current view header.

Slide 29 - Specimens List Views (Cont'd)

Slide notes:

3. Closed - Specimens List View: This view displays all specimen records that no longer require case management. This view can be accessed by selecting Closed - Specimens from the dropdown icon next to the current view header.
4. Headline - Specimens List View: This view displays all headline specimen records that coordinators need to address. This view can be accessed by selecting Headline - Specimens from the dropdown icon next to the current view header.

Slide 30 - Tabs in a Specimen Record

Slide notes: You can click the hyperlinked accession number of a specimen record from the Specimens page to navigate to a particular specimen record. You will see four tabs in the specimen record:

1. The Summary tab displays the details of any Patient, Specimen, Result, or authorized Services related to the specimen, Clinician and Payor.
2. The Pregnancy Information tab displays information about a Patient, Case, or Specimen Interpretation Factors.

Slide 31 - Tabs in a Specimen Record (Cont'd)

Slide notes:

3. The PNS Interpretation History tab displays a grid with all interpretation records for the specimen, with the latest one at the top. These fields are read-only and non-editable.
4. The Related tab provides an option to view the audit history of a specimen record as read-only fields.

We will now learn about the edits and updates that you can make in the Summary and Interpretation Factors tabs.

Slide 32 - Edits and Updates in the Summary Tab

Slide notes: Your day-to-day activities may require you to edit or update the following information in the Summary tab of a specimen record:

1. Specimen events
2. CCC assignments
3. PDC assignments
4. Services for specimen records
5. Payor information
6. Specimen record related tasks

Let us learn about each in detail.

Slide 33 - Updating Specimen Events: Walkthrough

Slide notes: You can use the Specimen Event field under the Specimen Event section of the Summary tab to enter Coordinator notes. The notes could be related to a Confirmation of Contact (CoC) regarding a specific set of specimen events applicable to that particular specimen.

Complete the following steps to update specimen events:

1. Press Enter or click the Magnifying Glass icon in the Specimen Event field to view a list of specimen events that can be added to a specimen record.
2. Select the required option.
3. Click the Save & Close button on the page ribbon at the top of the record to update the changes. You can also click the Save button if you want to stay on the same screen.

Slide 34 - Updating CCC Assignment: Walkthrough

Slide notes: You can reassign the case to a different CCC from the CCC field in the Specimen Details section of the Summary tab. Perform the following steps to update CCC Assignments:

1. Click the Magnifying Glass icon in the CCC field to get a quick list of Case Coordination Centers that can be assigned to a specimen record.
2. Select the required option.
3. Click the Save & Close button on the page ribbon at the top of the record to update the changes. You can also click the Save button if you want to stay on the same screen.
   A successful update will override the previously assigned CCC.

Slide 35 - Updating CCC Assignment: Walkthrough (Cont'd)

Slide notes: Please Note:

- When you select a CCC code that doesn't align with the zip code mapping in the system, a warning message requesting confirmation will be displayed.
- If you want to proceed, click Yes, or if you don't want to proceed, click No.
- Clicking No will close the message and not save any changes. If you click Yes, the system will create a task requiring you to update the CCC zip code assignment.

Slide 36 - Updating a PDC Assignment

Slide notes: The following actions can be performed using the PDC field under the Specimen Details section of the Summary tab:

- Refer the specimen to a new PDC site
- Reassign the specimen to a different PDC site
- Remove the assigned PDC site from the specimen record

Let us learn about each in detail.

Slide 37 - Refer the Specimen to a New PDC Site: Walkthrough

Slide notes: When a specimen is referred by a CCC to a PDC site, the specimen status changes from CCC Review to PDC Review. At that time, the PDC field will automatically be populated. Examples of when this may occur include a patient relocating in the state, availability of CVS services, or by request due to past positive experiences. Perform the following steps to refer a specimen to a new PDC site:

1. Click the Magnifying Glass icon in the PDC field to get a quick list of Prenatal Diagnosis Centers that can be assigned to a specimen record.
2. Select the required option.
3. Click the Save & Close button on the page ribbon at the top of the record to update the changes or click the Save button to stay on the same screen.

Slide 38 - Refer the Specimen to a New PDC Site: Walkthrough (Cont'd)

Slide notes: Please note:

- The Referral Date will be updated to the Current Date and will be displayed in the new PDC's Referred Specimens List View.
- When a specimen is referred to a PDC center, the patient and case records of the specimen will also be accessible to that PDC site.
- The system will authorize the services for which the specimen is eligible.

Slide 39 - Refer the Specimen to a New PDC Site - Scenarios

Slide notes: The following scenarios may occur when referring a specimen to a new PDC site from the case record:

- If you have two referable specimens (both cfDNA and MSAFP), then both specimens must be referred to the same PDC site.
- If the first specimen is referred to a particular PDC site and the patient has not been provided all the services they opted for, then the second specimen must be referred to the same PDC site as well.
- If you do not select the same PDC site for the second specimen on the specimen record, then an error message requesting that you select the same PDC site will be displayed.

Slide 40 - Reassign the Specimen to a New PDC Site: Walkthrough

Slide notes: You can reassign the specimen to a different PDC site. Perform the following steps to reassign a specimen to a new PDC site:

1. Click the Magnifying Glass icon in the PDC field to get a quick list of Prenatal Diagnosis Centers that can be assigned to a specimen record.
2. Select the required option.
3. Click the Save & Close button on the page ribbon at the top of the record to update the changes or click the Save button to stay on the same screen. SIS will now check if the current PDC site has any appointments associated with the specimen.

Slide 41 - Reassign the Specimen to a New PDC Site: Scenarios

Slide notes: Please note:

- You can reassign the specimen if there are no appointments or if the appointment status is Cancelled / No Show.
- If there are appointments with the scheduled status at the current PDC site, an error message will be displayed.

Slide 42 - Reassign the Specimen to a New PDC Site: Scenarios

Slide notes: SIS will remove a specimen’s association with the current PDC site upon reassignment to a new PDC site. This is done by removing the specimen from the current PDC site’s All Referred Specimens list view and adding it to the new PDC site once it is updated.

Let us learn about these scenarios in detail.

Slide 43 - Reassign the Specimen to a New PDC Site: Scenario 1

Slide notes: If an appointment is in the Kept status, the specimen will continue to be displayed in the Referred Specimen list view of the original PDC site.

Slide 44 - Reassign the Specimen to a New PDC Site: Scenario 2

Slide notes: If a service is in the Provided status, then the service will continue to be displayed with the original PDC site.

Slide 45 - Reassign the Specimen to a New PDC Site: Scenario 3

Slide notes: If a service has been provided by the original PDC site, the original PDC site will continue to have access to the PSR and can submit the services as Provided.

Slide 46 - Reassign the Specimen to a New PDC Site: Scenario 4

Slide notes: If a service is not provided, the service's authorization will be automatically removed by SIS.

Slide 47 - Reassign the Specimen to a New PDC Site: Scenario 5

Slide notes: If no case/specimen of a patient is assigned to the original PDC site, the patient's association with the original PDC site will be removed.

Slide 48 - Reassign the Specimen to a New PDC Site: Scenario 6

Slide notes: If any system generated task is assigned to the original PDC site, it will be marked as Complete.

Slide 49 - Reassign the Specimen to a New PDC Site: Scenario 7

Slide notes: If any Special Authorization Requests are pending from the original PDC site, the services on the request will be marked as Denied.

Slide 50 - Reassign the Specimen to a New PDC Site: Scenario 8

Slide notes: If an authorized service has not been provided by the original PDC site, the system will authorize any eligible services to the new PDC site upon referral.

Slide 51 - Reassign the Specimen to a New PDC Site: Scenario 9

Slide notes: If the referral has been cancelled for a PDC site, the PDC site will not be allowed to create new appointments or update the existing ones.

Slide 52 - Reassign the Specimen to a New PDC Site: Scenarios (Cont'd)

Slide notes: If there are no Kept appointments at the PDC site that's removed, the task for the PDC site will be the only record remaining of that patient for the staff associated with that PDC site. The staff will no longer be able to access the specimen, case, or other records associated with the referral.

Slide 53 - Remove the Assigned PDC Site from Specimen Record

Slide notes: If you remove an existing PDC site and do not select a new PDC site, then the system will change the status from PDC Review to CCC Review and generate a task to the current PDC site informing that the specimen referral is cancelled.

For example: If a pregnant individual is relocating in the state, remove the PDC site assignment until a new PDC site is confirmed near the patient's new location and then assign the new PDC site.

Slide 54 - Remove the Assigned PDC Site from Specimen Record: Walkthrough

Slide notes: If you remove an existing PDC site and do not select a new PDC site, then the system will change the status from PDC Review to CCC Review and generate a task to the current PDC site informing them that the specimen referral is Cancelled. For example: If a pregnant individual is relocating within the state, remove the individual's assigned PDC site until the patient's new address is confirmed. Once the new address is confirmed, assign the new PDC site for the patient. Perform the following steps to remove a specimen's assigned PDC on the specimen record:

1. Hover over the currently assigned PDC site name in the PDC lookup field and click the X icon to remove it.
2. Click the Save & Close button on the page ribbon to update the changes. You can also click the Save button if you want to stay on the same screen.

Slide 55 - Adding Payor Information: Walkthrough

Slide notes: The Summary tab will display Payor Information as the last section in the Specimen record to AR team members and superusers. Perform the following steps to add new Payor information:

1. Click the New Payor Information button at the top of the grid.
2. Enter all required information.
3. Click the Save & Close button on the page ribbon at the top of the record to update the changes. You can also click the Save button if you want to stay on the same screen.

Please note: Superusers can also delete payor information by selecting a record and clicking on the Delete Payor Information button that will be revealed once a record is selected. Admins can neither create nor delete Payor information.

Slide 56 - Editing Payor Information: Walkthrough

Slide notes: The Summary tab will display Payor Information as the last section in the Specimen record. Perform the following steps to edit existing Payor information:

1. Click Payor ID to navigate to the Payor record.
2. Enter all required information.
3. Click the Save & Close button on the page ribbon at the top of the record to update the changes.

Slide 57 - Edits and Updates in the Pregnancy Information tab

Slide notes: Your day-to-day activities may require you to edit or update the available information in the Pregnancy Information tab of a specimen record. You can edit any of the unlocked fields on the following three sections:

- Patient Interpretation Factors
- Case Interpretation Factors
- Specimen Interpretation Factors

Slide 58 - Edits and Updates in the Pregnancy Information tab (Cont'd)

Slide notes: Please Note:

- Screening results or interpretations are associated with specific result mailer types and any changes will impact the generated mailer. So, do so carefully, sparingly, and only when necessary.
- Saving any changes will result in a warning pop-up requesting your confirmation.
- Updates in the Case Interpretation Factors section will flow back to the respective case record and vice versa.

Slide 59 - Editing Adequacy Codes: Walkthrough

Slide notes: In this section, you will learn how to change the adequacy code of a specimen, so that the latest adequacy information is present in the system. Perform the following steps to edit the Adequacy Codes:

1. Click the Pregnancy Information tab at the top of the specimen record.
2. Click Adequacy Code in the Specimen Interpretation Factors section.
3. Use the Adequacy Code lookup field with available options specific to the specimen’s analyte type, either MSAFP or cfDNA, and appropriately select the adequacy code.

Please Note:

An update to an adequacy code will run a reinterpretation in SIS.

Slide 60 - Knowledge Check 3

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.

Which tab displays a grid with all interpretation records for a specimen?

Select the correct option.

Slide 61 - Appointment Records and List Views Lesson Objectives

Slide notes: Welcome to the Appointment Records and List Views lesson.

At the end of the lesson, you will be able to navigate the Appointment records and utilize the list views to complete specific tasks such as monitoring appointments.

Slide 62 - Appointments List View

Slide notes: All - Appointments list view is the only appointment list view available for GDSP users and provides Filter, Refresh, and Export options.

- Filters allow you to change your view.
- Refresh ensures the most up-to-date information is being displayed.
- Export enables you to open a table in Microsoft Excel.

Slide 63 - Types of Service Records

Slide notes: There are 15 types of service records viewable on an appointment. The service record types are filtered based on the GA range for the desired appointment date. The types of service records are listed below.

System Authorized by default but can be Specially Authorized. Specially Authorized only.

Slide 64 - View Authorized Services

Slide notes: You can only view the service records on an Appointment record for which the patient is authorized on the day of the appointment.

- All services that are in Approved service status for a specially authorized request (special authorization request status is Completed) will show up on the Authorized Services grid on a specimen record.
- Approved services that are not specially authorized are system authorized services.

Slide 65 - View Authorized Services: Scenarios

Slide notes: Of the 15 service records, some may not be displayed on the Appointment record due to specific scenarios. These scenarios only pertain to Specially Authorized services and are mentioned below:

- CVSK is authorized along with CVS in the same Special Authorization Request record.
- AMK is authorized along with AM in the same Special Authorization Request record.
- MA is authorized along with AM or CVS in the same Special Authorization Request record.
- AF is authorized along with AM in the same Special Authorization Request record.
- PBK is authorized along with PB in the same Special Authorization Request record.

Slide 66 - Types of Appointment Statuses

- Slide notes: You can view and update an appointment status on the Appointment record. Appointments can have any of the following four statuses:
- Scheduled: The default status of an appointment is Scheduled when it is initially created.
- No Show: The status of an appointment can be changed from Scheduled to No Show if the scheduled appointment date and time has passed and the patient did not turn up.
- Cancelled: The status of an appointment can be changed from Scheduled to Cancelled if the scheduled appointment date and time has not passed and the patient has cancelled.
- Kept: The status of an appointment can be changed from Scheduled to Kept if the scheduled date and time has passed and the patient attended the appointment.

Slide 67 - View and Update Appointment Status: Scenarios

Slide notes: Let us look at the scenarios when viewing and updating appointment statuses:

- Change of Status to Scheduled
- Specimen Reinterpretation - Scheduled Status
- Change of Status to Kept
- Change of Status from Kept
- PSR Linked to a Single Specimen
- PSR Linked to Multiple Specimens

Slide 68 - Change of Status to Scheduled

Slide notes: If you want to change the status of an appointment to Scheduled from any other status, ensure the appointment date and time are on or after the referral date while selecting the date and time.

If the selected appointment date and time are before the referral date, you will receive an error message while saving the record.

If two specimens exist on the same Appointment record, SIS considers the referral date of the first referred specimen for the error message.

Slide 69 - Specimen Reinterpretation – Scheduled Status

Slide notes: Any time a reinterpretation is run on a specimen, you can view the system-generated task. It might change the authorized services on the associated appointment in Scheduled status.

Any updates to the authorized services due to a specimen reinterpretation will only impact appointments in other statuses except for Kept.

This will result in a new system-generated task.

When a reinterpretation occurs due to new information learned at the PDC via Genetic Counseling or PDC Ultrasound, it is still important to check and possibly update the patient’s appointment service statuses if the new result may change what services remain authorized by GDSP policy.

Slide 70 - Change of Status to Kept

Slide notes: If you want to change the status of an appointment to Kept, ensure that all authorized appointment service statuses are marked as either Provided or Not Provided.

If authorized appointment service statuses are not marked, you will receive an error message while attempting to change the status before saving.

Slide 71 - Change of Status to Kept (Contd.)

Slide notes: When the status of an appointment is saved as Kept, a question card will appear on the Appointment record. Select either Yes or No to the question and click Save. If Yes, a PSR will automatically be created in Draft status if one does not already exist.

If the answer to all services being provided is Yes, the specimen status will be updated to PDC Review - Follow Up Completed for the associated PDC and specimen.

If a new specimen is referred after a PSR has been created and is in Draft status, in order to schedule an appointment for the newly referred specimen, select No as response to the question: Has the patient been provided with all the services they wish to opt for at this PDC?

However, if the PSR is in Invoiced status, then create a new appointment without any changes to the existing Kept appointment. This will eventually lead to the creation of a second PSR.

Slide 72 - Change of Status from Kept

Slide notes: If you update the status of an appointment from Kept to Scheduled, Cancelled, or No Show, then the authorized appointment service statuses are automatically updated to Pending status.

Slide 73 - PSR Linked to Single Specimen

Slide notes: The following will occur in case when a PSR is linked to a specimen when changing from Kept:

If the PSR is linked to a specimen and the updated date and time of the appointment is after the PSR creation date and time, the PSR will be deleted, and a case note will automatically be added regarding the deletion.

When the PSR is deleted, SIS will also wipe out the service record details and unlink the specimen from the Appointment record with a new case note regarding the unlinking.

This happens only when:

- There is only one appointment for a specimen
- The appointment is marked Kept by error.

The status of the appointment must be changed to a different status after filling out the PSR for the services in the appointment.

Slide 74 - PSR Linked to Multiple Specimen

Slide notes: When the update is changing the status from Kept:

If there are multiple specimens on a PSR, SIS will unlink the related specimen from the PSR record and the specimen’s status will be updated from PDC Follow Up Completed to PDC Review - Open.

Slide 75 - Appointment and Test Services Statuses
Slide notes: Any time an appointment is updated, the status of the services categorized as tests on a PSR must be the same: Provided or Not Provided. These services are:

- AMK, MA, and AF will have the same status as AM.
- CVSK will have the same status as CVS.
- UG will be marked Provided if it was authorized. Additionally, AM or CVS was provided and either 1US or 2US was not present on the same appointment.
- UG will be marked Provided if it was authorized. Additionally, AM or CVS was provided and either 1US or 2US is marked Not Provided on the same appointment.
- UG will be marked Not Provided if it was authorized. Additionally, AM or CVS was provided and either 1US or 2US is marked Provided on the same appointment.

Slide 76 - Knowledge Check 4

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.

What are the appointment statuses visible for Appointments List Views?

Select all that apply.

Slide 77 - TRFs Lesson Objectives

Slide notes: Welcome to the Test Requisition Forms (TRFs) lesson.

At the end of the lesson, you will be able to navigate to the TRFs and filter the list views to create new eTRFs and assign new specimen adequacy codes.

Slide 78 - Overview of TRF Record

Slide notes: A TRF is a digitized form of a prenatal screening order that was placed with a provider at the provider's facility. This form is the core source of information for all other records in SIS 2.0.

- The TRF records are organized by rows into their own list view. To access the TRF records, select TRF from the Left Navigation menu.
- You will land on the TRFs List View, which is the default view and displays the TRFs without any filters.

Slide 79 - TRF Statuses

Slide notes: The following TRF statuses can be viewed from the TRF landing page by filtering the list by status:

- Specimen Processed: eTRF has created a specimen record in SIS.
- Result Available: SIS has processed the result file for the TRF.

Slide 80 - TRF Records

Slide notes: GDSP users can view TRFs for review purposes, when necessary.

- To view a TRF, select the desired PNS Form number from the list view.
- You will be navigated to that TRF record to review.

Slide 81 - Knowledge Check 5

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.

Which of the following TRF statuses can be viewed from the TRF landing page?

Select all that apply.

Slide 82 - Report Management Lesson Objectives

Slide notes: Welcome to the Report Management lesson.

At the end of the lesson, you will be able to View, access, edit, and export a variety of reports including BI reports.

Slide 83 - Overview of BI Reports

Slide notes: You will be able to access BI Reports in SIS to view and take action as necessary. Available reports will be based on your role and will be refreshed on the hour every hour.

To navigate to the BI Reports, select BI Reports from the Left Navigation menu.

You will land on the BI Reports List Views page. Your default view should be the list view associated with your role which will contain reports available to you.

You can also set the default list view. The available reports specific to each user role are explained next.

Slide 84 - GDSP GDL Reports

Slide notes: The following BI reports are available to GDL users in SIS:

- TRFs Entered Missing Results After Overdue Days
- Count of Cases with Posted Results by Lab
- Specimens Turnaround Time

Slide 85 - GDSP Administrator Reports

Slide notes: The following BI report is available to GDSP Administrator users in SIS:

- Inadequate Specimens with Values Posted

Slide 86 - GDSP Leads Reports

Slide notes: The following BI report is available to GDSP Leads users in SIS:

- Count of Headline Cases

Slide 87 - GDSP Lab Reports

Slide notes: The following BI reports are available to GDSP Labs users in SIS:

- NAPS Monthly Invoice Numbers by Lab
- cfDNA Monthly Invoice Numbers by Lab
- Count of Cases with Posted Results by Lab
- Specimens Awaiting TRF Data Entry

Slide 88 - View BI Reports – SIS Export: Walkthrough

Slide notes: You can view BI reports for further review and utilize them for necessary purposes. Perform the following steps to view BI Reports in SIS 2.0:

1. Hover in the first column of the report you wish to view from the list of BI reports.
2. Click the empty Radio button to select a report.
3. Click the Export Selected Records button to export the report.
4. The report will download to your local machine for offline review, manipulation, and utilization in Microsoft Excel. You will be unable to view the reports directly in the SIS application.

Please Note: If you click the hyperlinked Report Name in the list view, Microsoft Power BI will open online in a new tab containing the report. From here you will have options to view and manipulate the report. BI reports are archived by GDSP for past version access.

Slide 89 - View BI Reports – Power BI: Walkthrough

Slide notes: Perform the following steps to export the report contents to Excel and PDF format using Power BI:

1. Click the Export button on Power BI Report tab that displays the report. Power BI offers other export formats, but the report has only been formatted for PDFs and Excel documents.
2. Once you click on any of the export formats, the export will be ready to be downloaded and saved to your local machine for offline review and utilization.

Slide 90 - BI Report Archiving

Slide notes: Previous versions of BI Reports will be archived in an Azure file share location based on the following schedule:

- Daily at 7:30 A.M. P.T.:
  - Specimens Awaiting TRF Data Entry Report
  - Inadequate Specimens with Values Posted Report
  - Specimens Late in Transit Report
  - Count of Cases with Posted Results by Lab Report
  - TRFs Entered Missing Results After Overdue Days Report
- Monthly, Every First Tuesday, at 7:30 A.M. P.T.:
  - Turnaround Time Report (New Report in SIS 2.0)
  - Count of Headline Cases Report
- Ad Hoc, No Schedule:
  - NAPS Monthly Invoice Numbers By Lab Report
  - cfDNA Monthly Invoice Numbers By Lab Report (New Report in SIS 2.0)

Slide 91 - Knowledge Check 6

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.

Which of the following forms can BI reports be viewed in?

Select all that apply.

Slide 92 - Course Summary`

Slide notes: Let’s summarize. Here are the key takeaways of the course:

Slide 93 - Thank You

Slide notes: You have completed this course. Press the Exit button to leave the course.