NAPS Labs Application Course

Slide 1 - Welcome

Slide notes: Welcome to the NAPS Labs Application 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: This course provides an overview of the core day-to-day activities for NAPS Labs users. While specific functionality in SIS depends on user security accesses, this course introduces the common functionalities available to all NAPS Labs users.

Slide 4 - Course Objectives

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

- Describe Test Requisition Form records and list views
- Identify how to process electronic orders
- Identify how to process manual orders
- Identify how to create clinician entities and associated facilities records
- Identify how to view and export BI reports

Slide 5 - Lesson Objectives

Slide notes: Welcome to the TRF Records and List Views lesson of this course.
At the end of the lesson, you will be able to describe TRF records and list views.

Slide 6 - Access NAPS Labs Application

Slide notes: To access the NAPS Labs Application, you need to first sign into the SIS Application by following the steps previously covered in the SIS General Functionality course.
You will be navigated to the NAPS landing page, All - TRFs List View, where you will need to agree to the California Terms of Use. You will only see TRFs associated with your lab site.

Slide 7 - Overview of TRF Record

Slide notes: A Test Requisition Form, or PNS Order Form, is the receipt of a prenatal screening order that was placed with a provider at a provider's facility. This form is the core source of information for all other records in SIS 2.0.
These records are organized by rows into their own list view which is accessible by selecting TRF from the Left Navigation menu.

Slide 8 - TRF Statuses

Slide notes: TRF records will always have a status assignment and may travel through different statuses at different times. The following statuses are available in TRF records:

- The Draft status filters manual or all-paper TRF entry records that are open.
  All fields are editable in these records.
- The Submitted status filters TRF records for which data entry is complete and are submitted to be processed in a nightly batch to create the Specimens records in SIS.
  All non-portal fields are editable in these records.
- The Specimen Received status filters electronic TRF records for which a specimen is received at the lab.
  All fields that were entered at a NAPS Lab will be editable, until picked up by the nightly batch.
- The Specimen Processed status displays both electronic and manual TRF records which have been processed in a nightly batch to create the Specimens records in SIS.
  No field is editable in these records.
- The Resulted status filters Specimens records for which SIS has processed a result.
  No field is editable in these records.
- The Not Received status filters TRF records that do not have specimens received by the lab but have been created in the Portal. No action is needed in these records.
  After being visible in the Portal for up to 21 weeks of GA with no specimen received, the status will change to Not Received and will disappear from Portal view but will be viewable on All - TRFs List View.

Slide 9 - TRF List Views

Slide notes: The TRF list views display TRF records according to which status they are in.
The TRF list views are the following:

1. All - TRFs
2. Draft - TRFs
3. Specimen Received - TRFs
4. TRFs Submitted Today

These list views can be toggled between to complete specific work goals. Let us learn about each in detail.

Slide 10 - All - TRFs List View

Slide notes: All - TRFs List View is the default view and displays all TRF records regardless of the status.

Slide 11 - Draft - TRFs List View

Slide notes: Draft - TRFs List View displays all TRF records with Draft status.
To access this view, click Draft - TRFs from the dropdown icon next to the current view header.

Slide 12 - Specimen Received - TRFs List View

Slide notes: Specimen Received - TRFs List View displays all TRF records with Specimen Received status.
You can select this view to link a specimen to an e-TRF.
To access this view, click Specimen Received - TRFs from the dropdown icon next to the current view header.

Slide 13 - TRFs Submitted Today List View

Slide notes: TRFs Submitted Today List View displays all TRFs for MSAFP specimens submitted on that calendar day.

Slide 14 - Knowledge Check

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.
Which TRF status will prevent you from making any edits?
Select the correct option.

Slide 15 - Lesson Objectives

Slide notes: Welcome to the Process Electronic Orders lesson of this course.
At the end of the lesson, you will be able to identify how to process electronic orders.

Slide 16 - Overview of Electronic Orders

Slide notes: Electronic orders are orders placed from the Portal which are directly saved into SIS database. These e-TRFs, or electronic TRFs, are available for retrieval at the time of accessioning. A Clinician enters the TRF information at the time the prenatal screening order is placed.

You can search for this information in SIS by scanning the barcode on the order receipt once it is received at the lab with the specimen.

These records are accessible by selecting Complete Electronic PNS Order from the Left Navigation menu.

Slide 17 - Link Electronic TRFs: Demonstration

Slide notes: Let us see the steps to link electronic TRFs in the SIS application.

1. Receive Specimen in mail with Paperwork (external from SIS):

   Along with the specimen, you will receive an e-TRF order printout with a pre-printed barcode highlighting a TRF "S" number and patient's consent to the screening. To generate the TRF record in SIS, link this electronic order confirmation page of the specimen to its e-TRF. Click Complete Electronic PNS Order from the Left Navigation menu to start linking electronic orders.

2. Search TRF Number:

   On the Complete Electronic PNS Order page, you can search for the e-TRF. Click Scan or Enter TRF Number field. Scan the e-TRF bar code from the printout. The patient details will automatically be populated after the TRF number is entered or scanned.

   Please note, specific NAPS labs will be able to enter the External Patient Identifier in place of the TRF number.

3. Link TRF to Accession Number:

   Click Scan or Type Accession Number field. Scan the accession number from the accession number label barcode in the top right of the paper order receipt. You may also enter the original Visual Accession number in the field. Upon entering either format of the accession number, SIS will populate the Visual Accession number field in the original format. If entering in a visual accession format, the fields will be identical. If entering the updated format, SIS will reformat the number to match the visual accession format. The SIS accession number field will also auto-populate upon entry in the Scan or Type Accession Number field.

   Select the appropriate Adequacy Code. Please refer to the list of adequacy codes to fill in the correct adequacy status.

   Next, enter Blood Draw Facility Name, Blood Draw Facility Phone Number, Blood Draw Date and Collector's Initials.

4. Confirm consent and Insurance card (PHI):

   Review and confirm that patient consent and insurance information was received. You can process the specimen and assign the designated adequacy code, even if consent was not received by your lab, and the e-TRF will be assigned to GDSP program staff for further processing.

5. Saving the record:

   Once everything is verified and the accession is complete, click the Save and 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. Once you save the record, the status will change to Specimen Received, and the e-TRF record will no longer be editable. An error message will appear if information is missing in a required field.

Slide 18 - Reading New Format Accession Numbers

Slide notes: Once the accession number is saved on a specimen record, SIS will split the accession number to populate the six fields that the accession number is comprised of.
These are analyte type, year, Julian date, lab center code, sequential generation, and check digits. For example, if the accession number is S-21-079-62-001-14, then the split will be as follows:
To understand the Julian Date, count the days from January 1 of that calendar year. For example, 079 is March 20th. Be mindful of Julian dates in leap years.

Slide 19 - Reading Visual Format Accession Numbers

Slide notes: You are also permitted to enter the original visual accession number format into SIS.
For example, if the accession number is 079-14-001/S-2021-62, then the split will be as follows:
To understand the Julian Date, count the days from January 1 of that calendar year. For example, 079 is March 20th. Be mindful of Julian dates in leap years.

Slide 20 - Knowledge Check

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.
Which type of Test Requisition Forms will NAPS Labs users interact with?
Select the correct option.

Slide 21 - Lesson Objectives

Slide notes: Welcome to the Process Manual Orders lesson of this course.
At the end of the lesson, you will be able to identify how to process manual orders.

Slide 22 - Overview of Manual Orders

Slide notes: For orders placed by clinicians that do not have the electronic portal or need to place a paper order due to a variety of technological issues, you will need to manually enter the data from the paper order form into SIS.
To process a manual order, you can enter and submit a TRF record from a manually submitted paper TRF on behalf of a Provider.

Slide 23 - Manual Paper TRF entry: Demonstration

Slide notes: Let us see the steps to manually enter paper TRF records in the SIS application.

1. Open new TRF form:
   Click Enter a Paper Screening Order from the Left Navigation menu to start entering the record. A new, blank TRF form will open with Draft status.
2. Enter required information:
   Click Scan or Type Accession Number field. Scan the accession number from the accession number label barcode.
   Click Clinician Search field to lookup an existing clinician record by name or medical number associated to them. Select the associated clinician record. The clinician details will automatically be populated after the clinician record is selected. If clinician record does not exist, then create a new clinician record and then search. Steps to complete this will be covered in a later lesson.
   Once you select the appropriate clinician then the Facility Name field will appear on the TRF.
   Click Facility Name field to lookup an existing facility record by name. Facilities will be filtered according to those associated with the provider selected. Select the associated facility record. The facility details will automatically be populated after selection. If facility record does not exist, then create a new facility record for the provider entity and then search. Steps to complete this will be covered in a later lesson.
   Enter all data as it appears on the TRF, including patient demographic, medical, and billing information, as well as patient decline of research if selected, specimen adequacy status and blood collection information.
   If the only information received is the minimum allowable data, e.g., patient’s last name and date of birth, then assign the appropriate MSAFP adequacy code as determined by GDSP. When this adequacy code is selected and saved, the TRF will be assigned to GDSP program staff for further processing.
3. Confirm consent and Insurance card (PHI):
   Review and confirm that patient consent and insurance information was received. You can process the specimen and assign the designated adequacy code even if consent was not received by your lab, and the e-TRF will be assigned to GDSP program staff for further processing.
4. Saving the record:
   The status will be Draft until the form is saved after entering all the required information. Once everything is verified and the accession is complete, click the Save and Close button on the page ribbon to update the changes and to change the TRF status to Specimen Received.
   You can also click the Save button if you want to stay on the same screen. After saving, a TRF “S” number will be generated and the TRF will be viewable in the Specimen Received – TRFs List View and the TRF record will no longer be editable apart from the accession number field.
   An error message will appear if information is missing in a required field.

Slide 24 - Knowledge Check

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.
When entering a manual all-paper TRF, SIS will only display facility name as an option while searching for a clinician facility that are:
Select the correct options.

Slide 25 - Lesson Objectives

Slide notes: Welcome to the Entity Creation lesson of this course.
At the end of the lesson, you will be able to identify how to create clinician entities and associated facilities records.

Slide 26 - Overview of Entity Creation

Slide notes: You can add clinician entities, associated facility records, and license records.
This will be done on quick forms or Quick create on the page ribbon.
Please note, if any of these entities were created in the Portal by providers, they cannot be modified by other users.

Slide 27 - Create Clinician Entities: Demonstration

Slide notes: Let us see the steps to create a clinician entity in the SIS application.

1. Click Enter a Paper Screening Order from the Left Navigation menu
2. Click the magnifying glass icon in the Clinician Search field in the Lookup Existing Clinician tab
3. Click New Clinician
4. A form to add new clinician record will appear. Enter the required details
5. Click Save and Close to save the record
6. The new clinician record will now be available as a selection in the Clinician Search field

Slide 28 - Create Facility Records: Demonstration

Slide notes: Let us see the steps to create a facility record in the SIS application.

1. Click Enter a Paper Screening Order from the Left Navigation menu
2. Click the magnifying glass icon in the Facility Name field in the Lookup Facility tab
3. Click New Clinician Contact/Facility
4. A form to add new facility record will appear. Enter the required details
5. Click Save and Close to save the record
6. The new facility record will now be available as a selection in the Facility Name field

Slide 29 - Knowledge Check

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.
Which of the following actions can be performed by users once a clinician entity or facility record is successfully created?
Select the correct option.

Slide 30 - Lesson Objectives

Slide notes: Welcome to the NAPS BI Reports lesson of this course.
At the end of the lesson, you will be able to identify how to view and export BI reports.

Slide 31 - Overview of BI Reports

Slide notes: You can access BI Reports in SIS to view and export, as necessary. The reports will be based on your role and will be refreshed on the hour. If you have the BI Report list views open for over an hour with no action, you may need to manually refresh the page to access the most up-to-date information.
The following BI reports are available to NAPS Labs users in SIS:

- Specimens Awaiting TRF Data Entry
- Count of Cases with Posted Results by Lab
- NAPS Monthly Invoice Numbers by Lab
- PNS TRFs Values Posted by Analyte Lab Julian Date report

Slide 32 - View and Export BI Reports: Walkthrough

Slide notes: Perform the following steps to access BI reports.

1. Click BI Reports from the Left Navigation menu.
2. Select the report you need to view with a radio button.
3. Click Export Selected Records button on the ribbon 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.

Slide 33 – View and Export BI Reports – SIS Export: Walkthrough (Contd.)

Slide notes:

5. 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 34 - 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.
2. Select the PDF or MS Excel option as required. Power BI offers other export formats as well, but the report has only been formatted to cater to only PDF and Excel exporting.
3. 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 35 - Knowledge Check

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.
Which of the following actions can be performed on BI Reports?
Select the correct options.

Slide 36 - Course Summary

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

Slide 37

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