SIS2.0 Application Introduction and Orientation Course

Slide 1 - Welcome

Slide notes: Welcome to the SIS 2.0 Introduction and Orientation course.
Click the Begin Course button or press Enter on the 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 the course
- 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 SIS 2.0, the updated platform for GDSP's Prenatal Screening Program and its key features.
While user-specific functionality in SIS depends on role-based security accesses, this course introduces the common functionalities available to all SIS users.

Slide 4 - Learning Objectives

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

- Recognize the new SIS 2.0 terminology and describe the features of Microsoft Dynamics 365,
- Define user access rights and security groups, and
- Navigate the SIS application

Slide 5 - Lesson Objectives

Slide notes: Welcome to the SIS 2.0 terminology lesson of this course.
At the end of the lesson, you will be able to recognize the new SIS 2.0 terminology and describe the features of Microsoft Dynamics 365.

Slide 6 - Overview of MS Dynamics 365

Slide notes: Microsoft Dynamics 365 is a cloud-based portfolio of interconnected intelligent business applications.
SIS 2.0 is based on MS Dynamics 365 and will help reduce navigation time, processing time, and time to complete day-to-day activities.

Slide 7 - Features of Microsoft Dynamics 365

Slide notes: In SIS 2.0, you can efficiently navigate the system, enter data, read reports effectively, and more.
The key features of Microsoft Dynamics are:

- Tabbed Browsing
- Intuitive User Experience
- Simple Workflows
- Security, Privacy, and Reliability, and
- Advanced Reporting and Analytics

Slide 8 - Key Changes in Terminology from SIS 1.0 to SIS 2.0

Slide notes: The transition from SIS 1.0 to SIS 2.0 entails change in terminology related to the functionalities used in SIS.
The SIS 1.0 functionalities with key changes in terminology are:
SIS Application, Search, Client Profile, Case Details, Specimen Detail and Interpretation Factors, Test Results, Tracking Events, Alerts, View/Edit Log, Case Notes, Appointment, Services, PSR, Clinician Information, Entities and Address.
We will learn about change in each functionality in this course.

Slide 9 - Key Changes in Terminology from SIS 1.0 to SIS 2.0

Slide 9a - Key Changes: SIS Application

Slide notes: Apps is the term used to identify the tile on the App Selection window when logging into Microsoft Dynamics. Each user has access to the app(s) they need to perform their job functions based on your security access.
In SIS 1.0, there was a single SIS Application. In SIS 2.0, the respective apps will be available as tiles on the App screen based on your security access.
Some users, based on their access, could see icons for more than one app when they log in to SIS 2.0.

Slide 9b - Key Changes: Search Functionality

Slide notes: In SIS 2.0, Global Search and Quick Search functionalities are available.
SIS 2.0 has multiple functionalities to search for any required data:

1. Global Search: Global Search is available on all the apps as a search box at the top of each page (in the Blue-ribbon bar). Different kinds of records can be searched based on their unique identifier or IDs and pre-defined fields.
2. Quick Search: Quick Search is available in the apps and can be used by the users to search for different records in the active list view.

Slide 9c - Key Changes: Client Profile

Slide notes: In SIS 2.0, the Client – View Client Profile functionality is replaced by patient record that uses unique identifier to search for patient records.
Patient record provides a holistic view of the patient, including patient demographic information, patient address, and the related case and specimen records.
You can find a patient record by either:

1. Searching with Patient Name in Global or Custom Search
2. Accessing the Patient Name hyperlink

Slide 9d - Key Changes: Case Details

Slide notes: In SIS 2.0, the Case Overview – Case Summary (PNS) functionality is replaced by case record using unique Case ID to search for records.
A case record provides pregnancy details for the patient and includes all specimens within that case for that patient and includes other details like associated clinicians, appointments, services, and patient service records (PSRs).
You can find a patient record by either:

1. Searching with Case Number in Global or Custom Search
2. Accessing the Case Number hyperlink

Slide 9e - Key Changes: Specimen Detail and Interpretation Factors

Slide notes: In SIS 2.0, the Specimen Case Summary (PNS) Screen is replaced by Specimen Record using Accession Number to search for records.

Specimen Record captures the specimen details of a given case, shifting the work on cases, including referrals and appointments to the specimen level, and displays the associated clinicians, appointments, services, and payor information.

You can access a Specimen Record by either:

1. Searching for the Accession Number in Global or Custom Search
2. Accessing the Accession Number hyperlink

Slide 9f - Key Changes: Test Results

Slide notes: In SIS 2.0, the Test Results – Case Summary functionality is replaced by Results. Test Results display the analysis date and interpretation of specimen and thus are available in the Related tab of the specimen record, where they can be viewed in the tab or be downloaded as a PDF document.

Slide 9g - Key Changes: Tracking Events

Slide notes: In SIS 2.0, the Tracking Events Functionality is replaced by Specimen Events.

Specimen Events are the actions that can be recorded by specific users on specimens. This action is available on specimen records.
Specimen events are now split by specimen type and primarily used by CCC and GDSP users.

Slide 9h - Key Changes: Alerts

Slide notes: In SIS 2.0, the Alerts functionality is replaced by Tasks that uses unique identifier Task ID.
Tasks are items that need to be addressed by a single user or a group (for example: a PDC). These can be both manually and auto generated by the system.
Tasks for a logged in user can be accessed through the Tasks option in the Left Navigation menu.

Slide 9i - Key Changes: View / Edit Log

Slide notes: In SIS 2.0, the View/Edit Log functionality is replaced by Audit History.
Audit History of a record is the log of all the edits done to a particular record. You can access Audit History through the Related tab on respective records. You can also filter the audit history by different fields in the record.
All the records contain an audit history which can be accessed from the record's page, if required.

Slide 9j - Key Changes: Case Notes

Slide notes: In SIS 2.0, Case Notes is replaced by Case Timeline.
Case Timeline contains all the major activities in the lifecycle of a case and the case notes that were either autogenerated or added by SIS users. You can access the case timeline through the Timeline tab on the case record.

Slide 9k - Key Changes: Appointment

Slide notes: In SIS 2.0, the term Appointment is replaced by Appointment Record.
Appointment record captures the details of the patient's appointment for services at the PDC.
You can find an appointment record by either:

1. Searching with Appointment ID in Global Search
2. Accessing the Appointment ID hyperlink

Slide 9l - Key Changes: Services

Slide notes: In SIS 2.0, the term Services is replaced by Service Record.
A service record contains the details of a service that has been authorized for the patient at the PDC, including whether it was provided or not.

Slide 9m - Key Changes: PSR

Slide notes: In SIS 2.0, the term Enter PSR is replaced by PSR Record – Auto Generated by System.
PSR record is a record of all the services provided to the patient at the PDC.
You can find a PSR by either:

1. Searching with PSR ID in Global Search
2. Accessing the PSR ID hyperlink from the case record

Slide 9n - Key Changes: Entities

Slide notes: In SIS 2.0, the Entities functionality is grouped as CCC Entity, PDC Entity, and LAB Entity.
Entities are grouped as:

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

All the entities involved in the PNS Program lifecycle are managed in the Entity Management app.

Slide 9o - Key Changes: Clinician Information

Slide notes: In SIS 2.0, the term Clinician Entity is replaced by Clinician Record.
Clinician record contains the details about the clinician and the facility address where they work.
You can find a clinician record by accessing the Clinician hyperlink.
You can create, manage, or update a clinician entity from Portal or the Clinician tab.
Clinicians can now be assigned to multiple facilities.

Slide 9p - Key Changes: Address

Slide notes: In SIS 2.0, Address is classified into five categories.
Address is classified as:

- Patient Address Record
- Clinician Address Record
- CCC Address Record
- PDC Address Record
- Lab Address Record

Address records for each of the patient, clinician, CCC, PDC and Lab can be accessed in the respective record's page.

Slide 10 - Knowledge Check

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.
Which of the following is the new term replacing Alerts in SIS 2.0?
Select the correct option.

Slide 11 - Lesson Objectives

Slide notes: Welcome to the Security Groups lesson of this course.

At the end of the lesson, you will be able to define user access rights and security groups.

Slide 12 - Security Groups or Teams

Slide notes: A security group is a collection of roles that interact with SIS in a particular manner or clinical specification. The security group you belong to defines the apps and data you have access to.
A user group is a collection of personas that interacts with SIS and works under the same business unit at GDSP.

Slide 13 - User Groups

Slide notes: User Groups are a collection of users that work under the same business unit.
Each SIS user group that is a part of the PNS Program will have specific access permissions based on their role. This includes access to a user-specific app and designated work screens to complete unique job-related activities.
Most user groups are a part of the same security group.
While there are many applications that work together and seamlessly communicate with one another, each user group will have access to their specific app related to their area. For instance, if you work within the Case Coordination Centers (CCCs), you will only be able to view and have access to the CCC app tiles. Likewise, if you work within the Prenatal Diagnosis Centers (PDC), you will only have access to the PDC app.

Slide 14 - Security Group: User Access Rights

Slide notes: User access rights are determined by your security group.
You can only view data assigned to your specific facility location. For example, PDC users will not be able to see information for all PDCs, but rather, only data assigned to their specific PDC. This is to ensure that protected information is only accessed on an as needed basis per user.
Specific user access rights such as create, read, write, append, and delete access ensures protected information is only accessed on an as needed basis.

Slide 15 - Knowledge Check

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.
Which of the following defines a user group?
Select the correct options.

Slide 16 - Lesson Objectives

Slide notes: Welcome to the Screen Navigation lesson of this course.
At the end of the lesson, you will be able to navigate the SIS application.

Slide 17 - Common SIS icons and features: Demonstration

Slide notes
The following key SIS icons and features are available to all user roles:

- Dynamics 365 Ribbon
- Site Map
- Left Navigation Menu
- Home
- Recent
- Pinned
- Column Options
- Filter
- Global Search, and
- Quick Search

You can expand or contract the Left Navigation menu by clicking the Site Map icon.

Slide 18 - Microsoft Dynamics 365 Ribbon

Slide notes: The Microsoft Ribbon is a collection of icons located at the top of each screen in Microsoft Dynamics 365. It is used to search for records, create a new record, create advanced search queries, set up personal options in settings, get help, and view user information. The ribbon also displays the custom actions available for each kind of record.
The following standard buttons are available on the Ribbon:

- The Back Arrow button navigates to the previous page.
- The Save button saves any changes made to the fields in a record. Get in the habit of saving often, as there is no auto-save function. There are many pages in SIS 2.0 that require you to save a record with some information before you can enter the remaining information.
- The Save & Close button saves any changes made to the fields in a record and closes the record. A standard dynamics error message will be displayed if you make any change on a page and try to navigate to any other page without saving it.
- Finally, the Create button creates new records or entities.

Slide 19 - Site Map

Slide notes: The Site Map icon, a stack of three lines on the upper left corner of the Left Navigation menu, compresses or expands the Left Navigation menu, allowing you to either see the icons along with their item labels or just the icons without the labels.
Compressing the Left Navigation menu provides more space to work on the current page. You can use this at your preference.

Slide 20 - Left Navigation Menu

Slide notes: The Left Navigation menu is a collection of items representing the key screens in the current SIS app.
The items available in the Left Navigation menu are based on your role specific security access. You can only view and access the specific Left Navigation menu items related to your logged in user role, which varies by the app used.

Slide 21 - Home

Slide notes: The Home button enables navigation back to the landing page from any screen in SIS.

Slide 22 - Recent

Slide notes: The Recent button in the Left Navigation menu allows you to view the recently visited screens in SIS.
The Recent dropdown icon reveals the ten most recently visited screens, including specific records or list view pages. For example, a specific Specimen Record or Special Authorization request.
It acts like browser history and allows quick navigation.

Slide 23 - Pinned

Slide notes: The Pinned button in the Left Navigation Menu allows you to view your personally pinned screens list in SIS.
The Pinned dropdown icon lists the pinned navigation links of your most frequented screens.
Items can be added to the Pinned list from the Recent list by clicking the Add to Pinned icon next to the label of the item.
You can remove a pin any time by clicking the diagonal pushpin icon next to the item label in either the Recent or Pinned list.

Slide 24 - Column Options

Slide notes: The Column Options icon allows you to edit the columns on the screen. You can use it to easily drag and drop, resize, and reorder the columns.
Once you have reorganized the items, scroll down, and clicked Apply, the screen will automatically refresh to display the information in the customized order.
A horizontal scrollbar will appear and can be used if the width of the columns exceeds the screen width.

Slide 25 - Apply Filter: Demonstration

Slide notes: The Filter icon allows you to customize the displayed order of records in list views. Let us see how to use the Filter functionality in the SIS application.
Navigate to a page via the Left Navigation Menu. For the purpose of this demonstration let us navigate to **All – Specimens** list view. Please note that we learn about list views in the following course.

1. Select Specimens in the Left Navigation menu
2. a. Click the list view dropdown icon
   b. Select All - Specimens from the list view dropdown
3. Click Edit filters.

The Edit filters screen appears.

4. Select the statuses you want to filter by in the Edit filters screen

For this training, let us consider we want to view records with Specimen status equals PDC review created during the last six months.
You can select the desired statuses by removing pre-loaded filtering options in the associated fields.
You can also remove a filter row by clicking the ellipsis next to the fields and selecting Delete.
You can also add a filter row by clicking +Add and selecting Add row from the dropdown. Let us consider, we want to add a filter for records with Specimen Sub-Status as not Open.
Additionally, you can reset any applied filters to default by clicking Reset to default.

5. Click Apply to apply the selected filters

Please note you have an option of saving the result view as a personal view.

- Click the dropdown next to Create view.
- Select Save as new view
- Add Name and Description in the Save as new view pop-up
- Click Save to save this view

You can access your saved views from My Views in list views dropdown.

Slide 26 - Global Search and Quick Search

Slide notes: The Global Search bar is available at the top of every page. The Quick Search bar is available next to the Edit Filters button.
You can utilize this search bar to quickly search SIS for records and other screens in multiple places in the system.
You can utilize the Quick Search bar to search the selected list view for the required records.
This feature will be covered with more details in the next course.

Slide 27 - Cards

Slide notes: A Card is a method to display information in SIS.
Cards organize a single data set into an easy to view format.

Slide 28 - Grids

Slide notes: A Grid is a method to display tabular information in SIS.
Grids are tables that are integrated throughout SIS 2.0 and display one or more data sets as rows organized by columns.

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 are examples of navigation components in SIS 2.0?
Select the correct options.

Slide 30 - Course Summary

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

Slide 31

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