Case Coordinators: Core Functions Course

Slide 1 - Welcome

Slide notes: Welcome to the Case Coordinators: Core Functions 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 Case Coordinators Core Functions course provides an overview of the core functions performed by CCC users on a day-to-day basis.

While user-specific functionality in SIS depends on user security accesses, this course introduces the common functionalities available to all CCC users.

Slide 4 - Course Objectives

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

- Access and manage Patient and Case records, Specimen records and List views, and Appointments
- View and export BI reports.

Slide 5 - Lesson Objectives

Slide notes: Welcome to the CCC Records and List Views lesson of this course.

At the end of the lesson, you will be able to access and manage Patient and Case records, Specimen records and List Views, and Appointments.

Slide 6 – CCC Apps Introduction

Slide notes: After you sign in as per the steps covered in the SIS2.0 General Functionality module, you will land on the Application Selection window comprising different tiles. You can click on the persona tile of PNS - CCC to access the landing page to begin your activities.

Slide 7 - Specimen Records

Slide notes: Specimen records contain all the details associated with a specific specimen in SIS. You can access the Specimens page by logging into the CCC application and clicking Specimens from the Left Navigation menu.

Slide 8 - Specimens Record List Views

Slide notes: There are two Specimens list views. You can toggle between these list views to complete specific work goals. They are:

1. Headline - Specimens List View:

This view displays all headline specimen records that you need to address daily. This view is your default specimen list view as well as your application landing page.

2. Follow Up Completed - Specimens List View:

This view shows all specimens in PDC Review status and Follow Up Completed sub-status for your CCC.

Slide 9 - Tabs in a Specimen Record

Slide notes: You can click a specimen's accession number to select the specimen's record from the Headline Specimens list view to review a headline specimen. You can view all information related to that specimen once on the specimen record. The following four tabs will be visible for your action at the top of the 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's Interpretation Factors.

Slide 10 - Tabs in a Specimen Record (Contd.)

Slide notes:

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

Let us now learn about the edits and updates that you can make in the Summary and Pregnancy Information tabs.

Slide 11 - View and Edit a Specimen Record – Summary Tab: Walkthrough

Slide notes: Perform the following steps to view and edit a specimen record's Summary tab:

1. Click the desired accession number or double click the row in the list view to open the specimen record. You will land on Specimen record summary.
2. Edit the required unlocked fields. Most fields have a lock icon which means they are read-only. Fields with a red asterisk must be completed.
3. Click Save to stay on the record or Save & Close to confirm changes and return to the list view. An error message will appear when you try to save and have not completed all required fields.

Slide 12 - View Specimen record – Clinician Details

Slide notes: Specimen record will display the following Clinician Details associated with any specimen.

- Clinician Name - Displays the last name and the first name of the clinician associated with the respective specimen
- Facility Name - Displays the facility name of the clinician
- Facility Address - Displays the complete address of the clinician
- Facility Phone - Displays the associated clinician's phone number
- Facility Fax - Displays the associated clinician's fax
- Clinician Email - Displays the associated clinician's email address, and
- Draw Station Lab - Displays the lab where the specimen was collected from the patient

Click the checkbox next to the Facility Address, Facility Phone, Facility Ext., Facility Fax, and Clinician email fields to confirm if the details entered in these fields are validated.

Slide 13 - View the Specimen Record – Pregnancy Information Tab: Walkthrough

Slide notes: Perform the following steps to view the Pregnancy Information tab of a specimen:

1. Click the desired accession number in the list view to open the specimen record. You will land on Specimen record summary.
2. Click the Pregnancy Information tab.
3. View the required interpretation factors on the Pregnancy Information tab.

You can view the following sections from the tab:

- Patient interpretation factors
- Case interpretation factors
- Specimen interpretation factors

Slide 14 - View the Specimen Record – PNS Interpretation History tab: Walkthrough

Slide notes: The PNS Interpretation History tab is visible on the specimen record to view any initial interpretations and any reinterpretations of that specimen. Perform the following steps to view the PNS Interpretation History tab of a specimen:

1. Click the PNS Interpretation History tab from the specimen record.
2. View the grid with all interpretation records for the specimen with the latest interpretation record on the top from the PNS Interpretation History tab.

The grid should have the following columns:

- Interpretation ID
- Date of Interpretation
- Screening Result
- Updated By

Select an Interpretation ID to navigate to the PNS Interpretation record to view more details.

Slide 15 - View the Specimen Record – Related Tab Audit History and Specimen Results Tabs: Walkthrough

Slide notes: The Related Tab will give access to the Audit History and Specimen Results pages. Perform the following steps to view the Related tab of a specimen:

1. Click the Related tab to view the Audit History and Specimen Results options.
2. Click Audit History to view any actions taken on the specimen record.
3. Click Specimen Results to view any results generated for that specimen.

This view will detail the reviewed and approved screening results that inform Clinician Mailers.

Slide 16 - Edits and Updates in the Summary Tab

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

- Specimen Events
- CCC Assignments
- PDC Assignments
- Create specimen record related tasks

Let us learn about each in detail.

Slide 17 - Updating Specimen Events: Walkthrough

Slide notes: You can use the Specimen Event field under the Specimen Event card of the Summary tab to enter Coordinator notes related to a Confirmation of Contact 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 and 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 18 - TE99- Reversal - Undo previous Specimen Event: Walkthrough

Slide notes: You can see what specimen event has been designated and saved on the specimen record's Specimen Event field. Perform the following steps to Undo a previous specimen event:

1. From the Specimen Event lookup field either click the Magnifying Glass icon or press the Enter key to select 99 - Previous Specimen Event Entered in Error from the list.
2. If the above option is saved on the specimen record, then the following should occur:
   - All tasks generated by saving the previous Specimen event on the Specimen record will be closed.
   - The Specimen record will be reverted to the status prior to entering the erroneous specimen event.
   - The linked Case record will be reverted to the status prior to entering the erroneous specimen event.

Slide 19 - TE99 - Reversal - Undo Previous Specimen Event: Walkthrough (Cont'd)

Slide notes:

Please Note: There must be a specimen event saved within the last three days to be able to save a specimen event 99 or an error message will appear.

Slide 20 - 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 21 - Updating CCC Assignment: Walkthrough (Cont'd)

Slide notes:

Please Note: A warning message will be displayed when you select a CCC code that doesn’t align with the zip code mapping in the system.

If you want to proceed, click Yes, else, click No.

Clicking No will close the message and not save any changes. If yes, the system will create a task requiring you to update the CCC zip code assignment.

Slide 22 - 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
- Reassign the specimen to a different PDC
- Remove the assigned PDC from the specimen record

Let us learn about each in detail.

Slide 23 - Refer the Specimen to a new PDC Site: Walkthrough

Slide notes: When a specimen is referred from a CCC to a PDC site, the specimen status changes from CCC Review to PDC Review. The PDC field will automatically be populated at the time the specimen is in CCC Review. 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 and 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 24 - 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 after a successful update.
- The patient and case records of the specimen will be shared with the PDC site when it is referred to a PDC site.
- The system will authorize the eligible services for the specimen.
- Specimen Event 42 will always refer a specimen to a new PDC site.

Slide 25 - 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:

1. If you have two referable specimens (both cfDNA and MSAFP), then both specimens must be referred to the same PDC site.
2. 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.
3. 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 26 - 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 and 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 has any appointments associated with the specimen.

Please note:

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

Slide 27 - Reassign the Specimen to a new PDC Site: Scenarios

Slide notes: SIS will remove a specimen's association with the current PDC upon reassignment to a new PDC site. This is done by removing the specimen from the current PDC'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 28 - 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 29 - 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 30 - 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 31 - 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 32 - 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 will be removed.

Slide 33 - 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 34 - 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 35 - 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 36 - Reassign the Specimen to a new PDC Site: Scenario 9

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

Slide 37 - Reassign the Specimen to a new PDC Site: Scenarios

Slide notes: If there are no Kept appointments at the PDC site that's removed, the Task for the PDC will be the only record remaining of that patient for the staff associated with that PDC.

The staff will no longer be able to access the specimen, case, or other records associated with the referral.

Slide 38 - 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 until a new PDC site is confirmed near the patient's new location and then assign the new PDC.

Slide 39 - Remove the Assigned PDC Site from Specimen Record: Walkthrough

Slide notes: Perform the following steps to remove the PDC site for a 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 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.

Slide 40 - Interpretations Factors and Reinterpretation

Slide notes: As a case coordinator, you will view and verify specimen, patient, and case-level interpretation factors on the specimen record, so that the specimen has accurate interpretation information. You can trigger re-interpretation on Case, Specimen, or Patient by following these steps:

When you change any interpretation factors on a Specimen Record and click on Save or Save & Close button, a Dialog Box will display to confirm the changes to run a reinterpretation.

When Reinterpretation occurs:

1. Mailers may regenerate and appear on the timeline
2. New screening results may appear on the Results Card of the specimen record
3. Reinterpretation is displayed on the Interpretation History tab

Slide 41 - Edits and Updates in the Pregnancy Information tab

Slide notes: You may want to view and verify specimen, patient, and case-level interpretation factors on the specimen record, so that the specimen has accurate interpretation information. Your day-to-day activities may require you to edit or update the available information in the Interpretation Factors tab of a MSAFP 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 42 - Edits and Updates in the Pregnancy Information tab (Contd.)

Slide notes: However, 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
- cfDNA updates are handled differently and will be covered later

Slide 43 - Reinterpretation Triggers in the Pregnancy Information Tab

Slide notes: Changes on the following interpretation factor fields will trigger a reinterpretation upon clicking Save or Save and Close:

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

Slide 44 - Specimen Records – Pregnancy Information - Reinterpretation

Slide notes: You will be able to view, enter and edit the current dating method and GA on the case interpretation factors card. Update as required to perform re-interpretations.

Whenever the status of a specimen is in PDC Review and a PDC calls a coordinator asking to change an interpretation factor, the coordinator will answer the question, “Was this question due to a PDC recalculation?” with a choice of either Yes or No.

If the screening result changes, then the system will either authorize or revoke services.

Slide 45 - Reassigning CCC: Walkthrough

Slide notes: There may be instances when the CCC assignment needs to be updated. Perform the following steps to update a CCC assignment:

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 and 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 46 - Editing Adequacy Codes: Walkthrough

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

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 screening type, either MSAFP or cfDNA, and appropriately assign adequacy codes from the available list from any of the codes to any of the other codes listed next:

Slide 47 - Editing Adequacy Codes: Walkthrough (Contd.)

Slide notes:

MSAFP:

- A - Adequate specimen
- C - Coordinator to very name discrepancy
- M - Mismatched or mislabeled patient name on tube of blood
- O - Reasons explained by your Prenatal Screening Coordinator

cfDNA:

- AA - Adequate specimen
- CC - Coordinator verification
- MM - Mislabeling mismatch
- OO - Other

Slide 48 - Editing Adequacy Codes: Walkthrough (Cont'd)

Slide notes:

Please note:

- You will be unable to update to or from any other adequacy code or change an inadequate specimen to adequate.
- An update to any adequacy code field will run a reinterpretation in SIS and would update case notes.

Slide 49 - cfDNA Reinterpretation Workflow

Slide notes: The cfDNA reinterpretation workflow requires CCs to call cfDNA labs when patient demographic or any missing information is updated for a PNS Case. Reinterpretation will include regeneration of any outgoing results due to the reinterpretation. You will need to call the associated cfDNA lab to let them know of a needed interpretation factor change. That lab will send either a retransmitted result or a new order, via the clinician, and the following changes will occur:

For a retransmitted result for the same order number - the cfDNA result file will have existing cfDNA Lab Accession Number/Order Number and cfDNA result processing batch will overwrite the information on the Specimen record. The following actions will occur in SIS:

i. SIS will process the new result and override the existing result on the existing specimen
ii. SIS will cancel any existing mailers for this specimen if mailer status is Document Generated and approval status is Pending.
iii. SIS will generate the new result mailer after processing the amended result

If the adequacy code gets updated to CC in Specimen and there won't be an interpretation or new specimen result, then any new results beyond the first result, denoted by a "F", will display with a "C" meaning "corrected". This is an opportunity to enter a new case note.

Please Note: Refer to the GDSP policy on the site specific lab interpretation factors that require updates.

Slide 50 – Knowledge Check

Slide notes: 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 51 - Patient Records

Slide notes: A Patient Record will provide you with all the information of the patient such as demographic details, patient's address, cases, and specimens.

Slide 52 - Patient Records: Walkthrough

Slide notes: The patient record can be accessed in a variety of ways. One of the ways is to access it from the Left Navigation menu. Perform the following steps to view a patient record:

1. Select Specimens from the Left Navigation menu. You will be directed to Headline - Specimens list view.
2. Click the desired patient's name in the Patient Name column to access the patient record. On the Patient Record, you will see the Summary and Related tabs.
3. You may also access patient's records by searching for the patient's name.

The Patient Record page will show a ribbon bar with the options to Save, Save and Close, Refresh for the page to display refreshed data, to navigate Back, and Open the screen in a new window.

Slide 53 - Patient Records – Summary Tab

Slide notes: The Summary tab displays the following information about the Patient:

- Patient Details displays the demographic information of the patient
- Patient Address displays the contact information of the patient
- Cases displays all cases (current and previous pregnancies) associated with the patient. Click the Case ID to navigate to the specific case record to view the case timeline and case notes.
- Specimen displays all specimen associated with the patient. Click the Accession Number to navigate to the specific Specimen record.

Slide 54 - Update Patient Address: Walkthrough

Slide notes: Perform the following steps to view and update the patient address from the patient record:

1. Double click a Patient Address from the Patient Address table on the patient record to navigate to the Patient Address record.
2. Make the required updates to the unlocked fields.
3. Once all changes are made, click the Save and Close button on the top of the record to return to the patient record.

Slide 55 - Patient Records – Related Tab

Slide notes: You can navigate to several records related to the selected patient record. The Related tab provides you access to view the Audit History, Services, Appointments, PNS Mailer Details, and Special Authorization Requests. Perform the following step to view the Patient Record Related tab:

1. Select the Audit History option from the dropdown on the Related tab to see the audit of all the fields of the patient record.

Slide 56 - Case Records and List Views – Navigation

Slide notes: You can navigate to a case record from either the Patient or a Specimen record.

Alternatively, you can search for a specific Case ID from the Global Search bar. Select the Case ID to access the record.

Case records contain three tabs: Summary, Case Timeline, and Related tab that contain the Audit and Service History.

Let us learn about each in detail.

Slide 57 - Case Records – Summary Tab

Slide notes: The case record has all the information related to pregnancy and shows the following grids and cards on the Summary tab:

- Patient Details
- Case Details
- Gestational Age
- Test Results
- Associated Clinicians
- Appointments
- Services
- Special Authorization Requests
- Patient Service Reports (PSR)

Slide 58 - Case Records – Timeline Tab

Slide notes: Click on Timeline at the top of a record to view the Case Timeline. This page displays all the information associated with the case as timeline items. The data on a case timeline captures all the major events on a case, including supporting documents such as case coordinator notes, attachments, results mailers, and PDC summary.

The options available under this tab are as follows:

- Add Timeline Item (+) allows you to add the tasks or case notes
- Search Timeline field allows you to search all timeline items for the case
- Enter a note field allows you to enter a case coordinator note
- The paperclip icon allows you to attach a file to case record

Slide 59 - Navigate to Case Records – Timeline Tab: Walkthrough

Slide notes: Perform the following steps to navigate to and access Case Timeline:

1. Click the Timeline tab on the Case Record to be directed to the Case Timeline. From the main timeline screen, you can add notes and attachments related to the case.
2. Click the Plus icon (+) on the record to add Tasks. You may also add notes to the Timeline via this icon.
3. Click one of these options to navigate to a new page. On this page, you may enter all the desired information and save the record. You can also Filter the timeline data, Collapse and Expand your view, and Sort timeline data.

Slide 60 - Case Records – Related Tab

Slide notes: In the Related tab, select the Audit History from the dropdown to see the audit of all the fields of the case record.

The Audit history provides information that you can view in the following fields:

- Changed Date
- Changed By
- Event
- Changed Field
- Old Value
- New Value

Slide 61 - Case Records – Related Tab (Contd.)

Slide notes: In the Related tab, select Service History from the dropdown to see the services provided that are related to the case.

The Service History provides information that you can view in the following fields:

- PSR ID
- Accession #
- Date of Service
- Service Type
- Provider Name
- PDC Site
- Invoice #
- Special Authorization
- Service ID
- Reverse Payment

Slide 62 - Knowledge Check

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

The Related Tab provides access to which of the following views?

Select all that apply.

Slide 63 - CCC Appointment List Views

Slide notes: The only CCC appointment list view is All - Appointments. Appointments' statuses will be:

- Scheduled
- No Show
- Cancelled
- Completed

You can view and monitor current appointment status for specimens that are related to your specific CCC. Edits and updates on appointment records should not be made by CCC users.

Slide 64 - Appointment Records

Slide notes: Perform the following steps to view an Appointment Record.

1. Select the record from the list view.
2. You will land on the Appointment Record.
3. On this record, you can view the following details:
    - Appointment Details
    - The associated Specimen
    - Authorized Services for that appointment
    - Screening question: if all the desired services were provided.

Slide 65 - Knowledge Check

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

What are the appointment statuses visible for CCC Appointments List Views?

Select all that apply.

Slide 66 - Lesson Objectives

Slide notes: Welcome to the Report Management lesson of this course.

At the end of the lesson, you will be able to locate, view, and export BI reports.

Slide 67 - 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 sit on the page for over one hour with no action, you may need to manually refresh the page to access the most up-to-date information.

To navigate to BI Reports, select BI Reports from the Left Navigation menu. You will land on the BI Reports List Views page.

Slide 68 – CCC BI Reports

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

Report 305: PNS Specimens Late in Transit

Slide 69 - View BI Reports – SIS Export: Walkthrough

Slide notes: You can view BI reports for further analysis 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.

Slide 70 - View 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 71 - 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 72 - Knowledge Check

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 73 - Course Summary

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

Slide 74 - Thank You

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