Case Coordinators - Unique Actions Course

Slide 1 - Welcome

Slide notes: Welcome to the Case Coordinators - Unique Actions 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 - Unique Actions course provides an overview of the unique actions performed by CCC users on an as-needed basis.

While a specific functionality in SIS depends on a user’s security access, 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:

- Update Clinician Entities and manage Clinician Facilities
- Generate and cancel result mailers, and regenerate results
- Correctly map and associate unparented documents in SIS

Slide 5 - Lesson 1 Objectives

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

At the end of the lesson, you will be able to update Clinician Entities and manage Clinician Facilities.

Slide 6 - Overview of Entity Management

Slide notes: As a CCC user, you will also have access to a dedicated Entity Management application.

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 to you for management:

- Clinicians
- Clinician Facilities

You may update Clinician information and add or update facilities details when necessary. You will have viewing only access to the other entities located in the Left Navigation but editing these is not necessary for primary case management.

Slide 7 - Clinical Entity Management

Slide notes: You can access the Entity Management app by either switching apps, or when first logging in, by selecting the Entity Management App from the application selection screen. Perform the following steps to view the Clinician entities.

1. Select Clinicians from the Left Navigation menu to view the Clinicians list view.
2. The Clinician record will show you the options on the standard ribbon to Save, Save and Close, and to navigate to the previous page.
3. Clinician names will be displayed alphabetically under the Clinician Name field.

Slide 8 - Clinician Entity Editing

Slide notes: Perform the following steps to edit a Clinician Entity.

1. Select Clinicians on the Left Navigation menu in the Entity Management application.
2. Click the Clinician Name of the record you need to update from the list view.
3. You will be navigated to the Clinician record.
4. Make the required updates and click Save or Save & Close to return to the Clinician list view.

Slide 9 - Clinician Entity Editing (Cont’d)

Slide notes: Please note, if Clinician or Clinician Facilities entities were created in the CalGenetic Portal, they cannot be modified in SIS by any user.

CCC users will also be unable to create new Clinician entities and can only edit existing Clinician entities that have been created in SIS by NAPS lab users.

Slide 10 - Clinician Facilities Entity Record Editing

Slide notes: Perform the following steps to edit a Clinician Facilities Entity Record.

1. To make changes to facility information, select Clinician Facilities from the Left Navigation menu.
2. Once on the Clinician Facilities list view, double click the facility you wish to edit.
3. You may also access the associated Clinician Facilities details page from the Clinician record by clicking the Clinician Address ID from the Clinician Address grid.
4. Make the desired changes and click Save or Save & Close to update the record.

Slide 11 - Clinician Address Entity Record Creation

Slide notes: You may create a new facility directly from a Clinician record from the Clinician Addresses grid.

Click the New Clinician Contact button on the grid to reveal the Clinician Facility Quick Create view.

This facility will immediately be associated with the specific Clinician.

Slide 12 - Knowledge Check

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

A Coordinator can create a new clinician facility directly on a clinician entity record.

State whether True or False.

Slide 13 - Lesson 2 Objectives

Slide notes: Welcome to the Result PDF and Mailer Generation lesson of this course.

At the end of the lesson, you will be able to generate and cancel results mailers, and regenerate results.

Slide 14 - Introduction to Results Mailer Generation

Slide notes: Coordinators can cancel and regenerate results from specimen records based on the specimen events they enter or update.

For every screening result, a mailer will be generated to be sent to the Providers. There are many different mailer types for each screening test, specimen adequacy code, and test result. All results mailer PDFs are proofed and approved or rejected by the GDSP staff prior to mailing, and viewable by Coordinators from the specimen record and case timeline.

Slide 15 - PNS Results Record

Slide notes: All associated mailers for a specimen are visible in Specimen Results under the Related tab of a specimen record. All associated mailers will be displayed in a grid. Click the Result ID to view the PNS result details.

1. The following columns are visible from the Specimen Results view:
   - Result ID
   - Result Type
   - Trigger Date
   - File Date
   - Result Status
2. Select a Result ID from the grid to view a PNS Mailer Details page.

Slide 16 - Regenerate Results on cfDNA Specimen

Slide notes: You may be required to regenerate specimen results for a variety of reasons. To regenerate a cfDNA result on demand, perform the following steps:

1. Click the Rerun ISI button on the standard ribbon bar of a Specimen record.
2. SIS will run a check for ISI against adequacy codes only if the specimen is assigned the AA or FF adequacy codes with the following outcomes:
   a. Interpretation history record will be recreated
   b. Mailer will be regenerated
3. An error message will appear if attempting to rerun ISI on a cfDNA specimen with any other adequacy code. To actually reinterpret the specimen, Coordinators must call the associated cfDNA lab.

Slide 17 - Regenerate Results on MSAFP Specimen

Slide notes: To regenerate a MSAFP result on demand, perform the following step:

1. Click the Re-interp button on the standard ribbon bar of a MSAFP specimen.
    - If a change was made to the interpretation factors on the specimen, a reinterpretation will be run.
    - If no changes were made, a reinterpretation will run and a duplicate result will be generated.

Please note, though you may be asked to regenerate a result, Providers have the ability to pull and reprint results from the CalGenetic Portal.

Slide 18 - Regenerating Mailers: Walkthrough

Slide notes: Perform the following steps to regenerate a mailer on demand.

Click the Regenerate Results button on the standard ribbon bar of a Specimen record.

Slide 19 - Regenerating Mailers: Walkthrough (Cont'd)

Slide notes: SIS will generate a Modified results mailer for the specimen with the following rules:

1. If the interpretation factors were not modified or re-interpretation was not performed, and Regenerate Results button is clicked directly, then the File Date of any pending results mailer will be updated to the current date.
2. If there are no pending results mailers, then the latest generated result mailer will be created with a Pending status. The File Date and the Trigger Date will be the current date.
3. If there is a pending results mailer, then the existing pending results mailer will be updated to Cancelled status and a new Pending result will be generated.
4. If there are no test results present on the specimen, the following error message will be displayed:

    A results mailer could not be generated as test results are pending for this specimen.

Please note, though you may be asked to regenerate a result, Providers have the ability to download and reprint results from the CalGenetic Portal.

Slide 20 - Cancel Results

Slide notes: Perform the following steps to cancel a result mailer.

1. Select the Result record from the list.
2. Click the Cancel Result button on the sub grid header of Specimen Results to update the result status as Cancelled.
3. When you select one or more result mailer records with a Pending result status and click on the Cancel Result button, SIS will update the result status as Cancelled.
4. When a result in any status other than pending is selected and the Cancel Result button is clicked, SIS will display an error message.
5. Cancellation will be captured on the timeline.

Slide 21 - Confirmation of Contact

Slide notes: Perform the following steps to view the Confirmation of Contact.

1. On the Specimen Events card under the Summary tab of a Specimen record, you can enter Specimen Events which are categorized by numbers, ex: Specimen Event 21: Clinician told Inadequate Specimen.

Upon selecting specific specimen events, the Confirmation of Contact field will automatically reveal on the card and populate with pre-written text. This will give you an opportunity to enter free text Coordinator Notes in the field immediately below the Confirmation of Contact field.

Slide 22 - Confirmation of Contact (Cont'd)

Slide notes:

2. Click Save on the page ribbon to save your edits and to generate a mailer.
3. To view the action, click the Related tab of the specimen record and select Specimen Results.
4. The new result will be in Pending status in the top row of the grid, as it defaults to show newest first.

Slide 23 - Knowledge Check

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

In which status can you cancel a result?

Select the correct option.

Slide 24 - Lesson 3 Objectives

Slide notes: Welcome to the Link Order Documents lesson of this course.

At the end of the lesson, you will be able to correctly map, and associate unparented documents in SIS.

Slide 25 - Linking Unmatched Documents to a TRF Record

Slide notes: The system should have relevant scanned documents from the Test Requisition Form (TRF). In some cases, the system will not match the scanned documents to the TRF. These are considered unmatched order documents. These will be shown to CCC user under Link Order Documents from the Left Navigation menu. The list view will show all the unmatched documents. You can select each document, view, and attach to a TRF.

Slide 26 - Linking Unmatched Documents - Demonstration

Slide notes: You will be able to match unparented scanned documents to an existing TRF order from a given Link Order Documents record.

Let us see how to attach and save scanned documents.

1. On a TRF form, navigate to the Timeline tab to attach documents via the Paperclip icon.
2. Alternatively, you can select Link Order Documents from the Left Navigation menu of the CCC app.
3. Select a record from the Active Order Documents list view.
4. Lookup an existing PNS Form Number from the Quick Find Search field.
5. Select the record to move the scanned documents from the Active Order Documents record to the TRF record.
6. Once attached, click Save on the command bar.
7. SIS will display a message on the confirmation dialog box asking you to confirm the move.
8. If you confirm the move, then SIS will move the associated Note items to the TRF record.
9. The notes will be deleted from the Link Order Documents record.
10. If you cancel the move, then SIS will clear the PNS Form Number field, so you can enter another PNS Form Number to search.
11. Once confirmed, the Link Order Documents record status should be updated to Inactive and the record will no longer be viewable from the Active Order Documents list view.
12. The record will be moved to the Inactive Order Documents list view.

Slide 27 - Knowledge Check

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

A coordinator can select a document from the Link Order Documents left navigation to link an unparented document to a specific TRF.

State whether True or False.

Slide 28 - Course Summary

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

- Providers have the ability to download and reprint results from the CalGenetic Portal without Coordinator intervention
- Documents may become orphaned. You can attach the documents to a TRF record by linking other documents
- Case Coordinators can only manage entities created in SIS

Slide 29

Slide notes: You have completed this course.

Press the Exit button to leave the course.