# Genetic Disease Laboratory (GDL)

Slide 1 - Welcome

Slide notes: Welcome to the Genetic Disease Lab 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 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 the core day-to-day activities for GDSP GDL staff. While specific functionality in SIS depends on user security accesses, this course introduces the common functionalities available to GDL Staff.

Slide 4 - Learning Objectives

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

- Describe the different record types and their specific functions, including Specimens, Patient, and Case
- View, access, edit, and export BI reports

Slide 5 - Lesson Objectives

Slide notes: Welcome to the General Records lesson. At the end of the lesson, you will be able to describe the different record types and their specific functions, including Specimens, Patient, and Case.

Slide 6 - GDSP User Access: Walkthrough

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 your available application tiles.

1. As a GDL user, click the user App PNS - GDSP to access the landing page to begin.

Slide 7 - Introduce Patient Records

Slide notes: GDL users will be able to navigate to and view the Patient records in SIS. To do this,

1. Navigate to the Specimens list view and either select the patient name from the list view or select the specimen record.
2. Select the Patient Name to navigate to the patient record.
3. If you know the patient name you can also perform a global search to quickly access the record.

For GDL staff, you will have read-only access to Patient records.

Slide 8 - View Patient Address: Walkthrough

Slide notes: Perform the following steps to view a Patient Address record:

1. On the Summary tab, scroll down to the Patient Address card.
2. Double click the patient address from the card.
3. You will now see the full patient address details.

Slide 9 - Case Records

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

- Patient Details
- Case Details
- Appointments
- Services

Slide 10 - Specimen Records: Walkthrough

Slide notes: Specimen records contain all the details associated with a specific specimen in SIS. You have full read access across the PNS program to view Specimen records.
After logging into the GDSP application, click Specimens from the Left Navigation menu to access the Specimens page.

Slide 11 - 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:

- All - Specimens List View
- CCC 40 - Specimens List View
- Closed - Specimens List View
- Headline - Specimens List View

Slide 12 - Specimens Record List Views: All - Specimens

Slide notes:

- The All - Specimens List View displays all specimen records regardless of the specimen status.
- To access this view, select All - Specimens from the dropdown icon next to the current view header.

Slide 13 - Specimens List Views: CCC 40 - Specimens

Slide notes:

- The CCC40 - Specimens view displays all open specimen records that have been assigned to GDSP users for further processing based on their associated adequacy codes.
- To access this view, select CCC 40 - Specimens from the dropdown icon next to the current view header.

Slide 14 - Specimens Record List Views: Closed - Specimens

Slide notes:

- The Closed - Specimens List view displays all specimen records that no longer require case management.
- To access this view, select Closed - Specimens from the dropdown icon next to the current view header.

Slide 15 - Specimens Record List Views: Headline - Specimens

Slide notes:

- The Headline - Specimens List view displays all headline specimen records that coordinators need to address.
- To access this view, select Headline - Specimens from the dropdown icon next to the current view header

Slide 16 - Tabs in a Specimen Record

Slide notes: Click the hyperlinked accession number of a specimen record from the Specimens page to navigate to a particular specimen record. You have view-only access to the following specimen records. You will see four tabs in the specimen record:

- Summary
- Pregnancy Information
- PNS Interpretation History
- Related

Slide 17 - Tabs in a Specimen Record: Summary

Slide notes: The Summary tab displays the details of any patient, specimen, result, or authorized services related to the specimen, clinician, and payor.

Slide 18 - Tabs in a Specimen Record: Pregnancy Information

Slide notes: The Pregnancy Information tab displays information about a patient, case, or specimen's interpretation factors.

Slide 19 - Tabs in a Specimen Record: PNS Interpretation History

Slide notes: 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 read-only and cannot be edited.

Slide 20 - Tabs in a Specimen Record: Related

Slide notes: The Related tab displays and provides an option to view the audit history or the Specimen Results of a specimen.
Let us now learn about the edits and updates that you can make in the Summary and Interpretation Factors tabs.

Slide 21 - View Access in the Summary Tab

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

- Specimen Events
- CCC Assignments
- PDC Assignments
- Services on a specimen record

Let us learn about each in detail.

Slide 22 - Viewing Specimen Events

Slide notes: Perform the following steps to view a Specimen Event:

1. In the specimen record, scroll down to the Specimen Event section.
2. Here, you can view the Specimen Event, Confirmation of Contact, and the Coordinator Notes.

Slide 23 - View Interpretation Factors Tab

Slide notes: Your day-to-day activities may require you to view the available information in the Interpretation Factors tab of a specimen record. You can view the following for the PNS Program:

- Patient Interpretation Factors
- Case Interpretation Factors
- Specimen Interpretation Factors of the Interpretation Factors tab

Note: Each Screening result or interpretation is associated with a specific result mailer type.

Slide 24 - View Adequacy Codes: Walkthrough

Slide notes: In this section, you will learn how to view the Adequacy Code of a specimen. Perform the following steps to view the Adequacy Code:

1. Click the Pregnancy Information tab at the top of the specimen record.
2. Click Adequacy Code in the Specimen Interpretation Factors section.

3. You can now view the Adequacy Code details.

Slide 25 - Knowledge Check 1

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 26 - Lesson Objectives

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

Slide 27 - 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 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 28 - GDSP GDL Reports

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

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

Slide 29 - GDSP Administrator Reports

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

- Inadequate Specimens with Values Posted

Slide 30 - GDSP Leads Reports

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

- Count of Headline Cases

Slide 31 - GDSP Lab Reports

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

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

Slide 32 - 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 33 - 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 34 - Knowledge Check 2

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 35 - Course Summary

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

Slide 36 - Thank You

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