Prenatal Diagnosis Centers: Core Functions

Slide 1 - Welcome

Slide notes: Welcome to the Prenatal Diagnosis Centers: 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 Prenatal Diagnosis Centers: Core Functions course provides an overview of the core functions to be performed by PDC 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 PDC users.

Slide 4 - Course Objectives

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

- Navigate to and view specimen records and list views
- Navigate to, and view appointment records, create appointments, add or remove services, and update appointments
- View, monitor, and submit Special Authorization Requests

Slide 5 - PDC Records Lesson Objectives

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

At the end of the lesson, you will be able to navigate to and view specimen records and list views.

Slide 6 - PDC Apps Introduction

Slide notes: After you sign in as per the steps covered in the SIS 2.0 General Functionality module, you will land on the Application Selection window comprising different tiles. You can click the persona tile of PNS - PDC 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. Much of the work that was done on Case records in the previous version of SIS will now be done on Specimen records. After logging into the PDC application, you can view all of the specimens referred to you by the CCCs.

Slide 8 - Specimens Record List Views

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

1. Referred - Specimens List View: This view displays all referred specimens that you need to address daily. This view is your default specimen list view as well as your application landing page. In this view, you will only see specimens in PDC Review status for your PDC with sub-status of Open, which means it has been referred from CCCs.

Slide 9 - Specimens Record List Views (Cont'd)

Slide notes:

2. Follow Up Completed - Specimens List View: This view shows all specimens in PDC Review status with all services provided.
3. No Appointment - Specimens List View: This view shows all specimens that have been referred for which no appointment has been scheduled.

Slide 10 - Tabs in a Specimen Record

Slide notes: To review a referred specimen from the Referred - Specimens list view, select a Specimen record by clicking the Accession Number. 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. Summary tab: Displays the details of any Patient, Specimen, Result, Authorized Services, Special Authorization Requests, Appointments, Clinicians, and Tasks.
2. Pregnancy Information tab: Displays information about a Patient, Case, or Specimen's Interpretation Factors.

Slide 11 - Tabs in a Specimen Record (Cont'd)

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 read-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 12 - 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 tab.

2. The record is locked for field-level edits and will have View Only access. The buttons will be active for their specific use, such as Add New Appointment.

Slide 13 - Specimen Record - Summary Tab: Walkthrough (Cont'd)

Slide notes: The Specimen records will display the following grids and cards containing information specific to each unique specimen.

- Patient Details
- Specimen Event
- Results
- Specimen Details
- Services
- Special Authorization Requests
- Appointments
- All Case Specimens
- Clinician Details
- Tasks

Click any hyperlinked items to navigate to the other related records.

Slide 14 - Specimen Record – Pregnancy Information Tab

Slide notes: From the top of the record, select Pregnancy Information. You can review interpretation factors on the Pregnancy Information tab. From here you can view:

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

Slide 15 - Specimen Record – PNS Interpretation History Tab

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 to see a grid with all the interpretation records for the specimen, with the latest interpretation record on the top.
   The grid should have the following columns:

   - Interpretation ID
   - Date of Interpretation
   - Screening Result

Slide 16 - Specimen Record – PNS Interpretation History Tab (Cont'd)

Slide notes:

2. Click any of the records to navigate to a new page which should display all the Interpretation Factors.
   All fields displayed on the page are Read Only. These fields include:
   - Date of Interpretation
   - Screening Result
   - Patient Interpretation Factors
   - Case Interpretation Factors
   - Specimen Interpretation Factors

Slide 17 - Specimen Record - Related Tab

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 since creation.
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 18 - Specimen Record – New Appointment: Walkthrough

Slide notes: You can schedule new appointments for patient services from the Appointments grid of a Specimen record. Perform the following steps to schedule a new appointment:

1. Navigate to the Appointments grid from the Specimen record.
2. Click the Add New Appointment button on the grid.
3. From the New Appointment page, the appointment will automatically be placed into the Scheduled status and most fields will be auto populated.

Slide 19 - Specimen Record – New Appointment: Walkthrough (Cont'd)

Slide notes

4. Enter the Appointment Date by clicking on the Calendar icon followed by the Appointment Time by clicking on the Clock icon.
5. Click Save & Close to return to the Specimen record. The appointment is now viewable on the Specimen and Case records.

Slide 20 - Specimen Record – New Appointment: Walkthrough (Cont'd)

Slide notes: Please note, only one appointment can be scheduled at a PDC for a specimen at a time. To schedule a second appointment, the first appointment must be in an End State status.

SIS will only allow more than one appointment in the Scheduled status for a given specimen (one at PDC 1 and one at PDC 2, etc.) when a specially authorized service for the same specimen is authorized at a different PDC site than the originally assigned PDC site.

Slide 21 - New Appointment - Scenarios

Slide notes: You will be able to create an additional appointment, if a previous appointment is in either Kept, Cancelled, or No Show statuses, and the answer to the question, has the patient been provided, with all the services they wish to opt, for at this PDC, is No.

You will see an error message, when you try to create an appointment, if all previous appointments are in ‘Kept’ status, and the answer to the question, has the patient been provided, with all the services they wish to opt for, at this PDC, is Yes.

Slide 22 - New Appointment Scenarios (Cont'd)

Slide notes: After you create an appointment, SIS will automatically add all services with Approved authorization service status in Pending appointment service status associated with specimens that have been referred to your PDC for that patient.

These services will remain in Pending until they are given an appointment status of either Provided or Not Provided.

Please note, any authorized service that is a test, that’s dependent on a procedure to perform, such as karyotype services and Microarray, will not display on the appointment record, only on the PSR.

Slide 23 - New Appointment - Scenarios (Cont'd)

Slide notes: SIS will automatically add services in Approved authorization service status and Pending and Not Provided appointment service status, that are referred to a PDC to an appointment that is scheduled after the referral date. Services with a status of Not Provided will be added to an existing appointment, which is in any status other than Kept with the question marked as Yes. Otherwise, a new appointment will be created for that service.

For specially authorized services, an appointment can be scheduled on or after the date of approval of the specially authorized service.

A PDC user can create an appointment after the patient reaches the 24w0d mark if the specimen has any specially authorized service in Pending appointment service status. If the specimen does not have a specially authorized service in Pending appointment service status, then SIS will show an error message when a user tries to create an appointment. cfDNA specimens with appointments for the following services are allowable up to Gestational Age (GA) of 50 weeks, 0 days: GC, GC1 or 2US.

Slide 24 - Updating Appointments - Parameters

Slide notes: The updating appointments parameters are as follows:

If the appointment date and time is updated to a date and time in the future, then SIS will ensure that all the specimens and services in Pending and Not Provided appointment service status are added at the same time.

If an appointment date is changed and the authorized services for that appointment have changed, SIS will create a task for you to review the authorized services for that appointment.

If updating an appointment to a date and time in the past, the user must then place the appointment in an end state status of Kept, Cancelled, or No Show.

Slide 25 - Knowledge Check

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 Appointment Records lesson of this course.

At the end of the lesson, you will be able to navigate to and view appointment records, create appointments, add or remove services, and update appointments.

Slide 27 - Appointments List View

Slide notes: There are two available list views for PDC users.

- All - Appointments - Not all Services Provided List View: Shows all appointments regardless of appointment status, including kept appointments where the patient has not been provided with all desired services.
- Kept - Appointments - All Services Provided List View: Shows all appointments for which the status is Kept and all desired services have been provided to the patient.
- These options are available to take on the list views:
    - Filters allow you to change your view.
    - Refresh ensures the most up-to-date information is being displayed.
    - Export enables you to open a table in Microsoft Excel.

Slide 28 - Types of Appointment Statuses

Slide notes: You can view and update an appointment’s status on the Appointment record. Appointments can have any of the following four statuses.

- Scheduled: The default status of an appointment is Scheduled when it is initially created.
- No Show: The status of an appointment can be changed from Scheduled to No Show if the scheduled appointment date and time has passed and the patient did not turn up.
- Cancelled: The status of an appointment can be changed from Scheduled to Cancelled if the scheduled appointment date and time has not passed and the patient has cancelled.
- Kept: The status of an appointment can be changed from Scheduled to Kept if the scheduled date and time has passed and the patient attended the appointment.

Slide 29 - 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. Navigate through the record to see the fields you wish to view.
3. On this record, you can view the following details:
    - Appointment Details
    - The associated Specimen
    - Authorized Services for that Appointment
    - Screening question: Has the patient been provided with all of the authorized services that the patient wanted?

Slide 30 - Types of Service Records

Slide notes: There are 15 types of service records viewable on an appointment. The service record types are filtered based on the GA range for the desired appointment date. The types of service records are listed below.

Slide 31 - View Authorized Services

Slide notes: You can only view the service records on an Appointment record for which the patient is authorized on the day of the appointment.

All services that are authorized and whose authorization date window overlaps with the appointment date will show up on the Authorized Services grid on the Appointment record. This may include services that are approved when any special authorization requests are completed by GDSP.

Approved services that are not specially authorized are system authorized services.

Slide 32 - View Authorized Services: Scenarios

Slide notes: Of the 15 service records, some may not be displayed on the Appointment record due to specific scenarios. These scenarios only pertain to Specially Authorized services and are mentioned below:

- CVSK is authorized along with CVS in the same Special Authorization Request record
- AMK is authorized along with AM in the same Special Authorization Request record
- MA is authorized along with AM or CVS in the same Special Authorization Request record
- AF is authorized along with AM in the same Special Authorization Request record
- PBK is authorized along with PB in the same Special Authorization Request record

Slide 33 - Appointment Services Statuses

Slide notes: Services can have an Appointment Service Status of Pending, Provided, or Not Provided.

- When a service is initially added to an appointment, it will be in Pending status, pending to be provided at the scheduled date of the appointment.
- If the service is provided to the patient in a scheduled appointment, the appointment service status will be marked as Provided by PDC staff.
- If a service is declined by the patient, then the appointment service status will be marked as Not Provided by the PDC staff.
- For an appointment to be marked as Kept status, all the services in the appointment need to be marked as Provided or Not Provided.
- If an appointment's status is Cancelled or No Show, then the appointment service statuses of the services on the appointment will remain in Pending status.

Slide 34 - Update Appointment Status Scenarios

Slide notes: Changes may be required and are not made until you save edits made to the record. Here are some scenarios you may encounter while updating appointment statuses.

- Change of Status to Scheduled
- Specimen Reinterpretation - Scheduled Status
- Change of Status to Kept
- Change of Status from Kept
- PSR Linked to a Single Specimen
- PSR Linked to Multiple Specimens

Slide 35 - Change of Status to Scheduled

Slide notes: If you want to change the status of an appointment to Scheduled from any other status, ensure the appointment date and time are on or after the referral date while selecting the date and time.

If the selected appointment date and time are before the referral date, you will receive an error message while saving the record.

If two specimens exist on the same Appointment record, SIS considers the referral date of the first referred specimen for the error message.

Slide 36 - Specimen Reinterpretation – Scheduled Status

Slide notes: Any time a reinterpretation is run on a specimen, you can view the system-generated task. It might change the authorized services on the associated appointment in Scheduled status.

Any updates to the authorized services due to a specimen reinterpretation will only impact appointments in other statuses except for Kept.

This will result in a new system-generated task.

When a reinterpretation occurs due to new information learned at the PDC via Genetic Counseling or PDC Ultrasound, it is still important to check and possibly update the patient's appointment service statuses if the new result may change what services remain authorized by GDSP policy.

Slide 37 - Change of Status to Kept

Slide notes: If you want to change the status of an appointment to Kept, ensure that all authorized appointment service statuses are marked as either Provided or Not Provided.

If authorized appointment service statuses are not marked, you will receive an error message while attempting to change the status before saving.

Slide 38 - Change of Status to Kept (Cont'd)

Slide notes: When the status of an appointment is saved as Kept, a question card will appear on the Appointment record. Select either Yes or No to the question and click Save. If Yes, a PSR will automatically be created in Draft status if one does not already exist.

If the answer to all services being provided is Yes, the specimen status will be updated to PDC Review Follow Up Completed for the associated PDC and specimen.

If a new specimen is referred after a PSR has been created and is in Draft status, in order to schedule an appointment for the newly referred specimen, select No as response to the question: Has the patient been provided with all the services they wish to opt for at this PDC?

However, if the PSR is in Invoiced status, then create a new appointment without any changes to the existing Kept appointment. This will eventually lead to the creation of a second PSR. No field is editable in these records.

Slide 39 - Change of Status from Kept

Slide notes: If you update the status of an appointment from Kept to Scheduled, Cancelled, or No Show, then the authorized appointment service statuses for that appointment are automatically updated to Not Provided.

Slide 40 - PSR Linked to Single Specimen

Slide notes: The following will occur in case when a PSR is linked to a specimen when changing from Kept:

If the PSR is linked to a specimen and the updated date and time of the appointment is after the PSR creation date and time, the PSR details will be cleared, and a case note will automatically be added regarding the deletion.

When the PSR details is cleared, SIS will also wipe out the service record details and unlink the specimen from the Appointment record with a new case note regarding the unlinking.

This happens only when:

- There is only one appointment for a specimen
- The appointment is marked Kept by error

The status of the appointment is changed from Kept after filling out the PSR details for the services in the appointment.

Slide 41 - PSR Linked to Multiple Specimen

Slide notes: When the update is changing the status from Kept:

If there are multiple specimens on a PSR, SIS will unlink the related specimen from the PSR record and the specimen's status will be updated from PDC Follow Up Completed to PDC Review - Open.

Slide 42 - Appointment and Test Services Statuses

Slide notes: Any time an appointment is updated, status of the services categorized as tests on a PSR must be the same: Provided or Not Provided. These services are:

- AMK, MA, and AF will have the same status as AM
- CVSK will have the same status as CVS

Slide 43 - Knowledge Check

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

What is the status of the appointment if the scheduled appointment date and time has passed, and the patient did not turn up?

Select the correct option.

Slide 44 - Special Authorization Requests Lesson Objectives

Slide notes: Welcome to the Special Authorization Requests lesson of this course.

At the end of the lesson, you will be able to view, monitor, and submit Special Authorization Requests.

Slide 45 - PDC Special Authorization Requests List View

Slide notes: Special Authorization Request list view filters requests based on certain pre-determined criteria. You can filter the following list view:

- All - Special Authorization Requests List View: This is the only view and displays all requests submitted by your PDC site regardless of status.
  The list view displays the Filter, Refresh, and Export options.

Slide 46 - Create a Special Auth Request

Slide notes: You can click the New Special Authorization Request button on the specimen record's Special Authorization Requests sub-grid to navigate to a New Special Authorization Request record.

If the specimen is already closed and you click the New Special Authorization Request, you will receive an error message.

Slide 47 - Create a Special Auth Request: Walkthrough

Slide notes: Perform the following steps to create a Special Authorization Request:

1. Navigate to the Special Authorization Requests sub-grid in a specimen record.
2. Click the New Special Authorization button.
3. Fill out the Requested by field and click Save from the ribbon. The PDC Assignment field will be automatically populated by SIS to your PDC site if the specimen is referred to you. Upon saving the request, the associated specimen and case records will be shared with the newly assigned PDC.

Slide 49 - Create a Special Auth Request: Walkthrough (Cont'd)

Slide notes: Please note, once all services are set to either Approved or Denied by GDSP, the status will automatically change to Completed. The date the special auth request is in Completed status can be after the date of the specimen reaches the 24w0d GA mark.

The authorization window for specially authorized services is from the date the request becomes Completed to the end of the pregnancy and there is no GA limit of 24w0d for specially authorized services. If a Specimen record has any specially authorized services in Pending appointment service status, then SIS will not close the specimen after the 24w1d GA mark. A GA of 50 weeks 0 days will automatically close the specimen and case.

Slide 50 - PDC Special Authorization Requests – Adding Services: Walkthrough

Slide notes: You can add services to a request, one service at a time. Perform the following steps to add services to a Special Authorization Request:

1. Click the New Services button on the Requested Services grid to access the Quick Create Services form. You will be able to add any service type for approval if that service type has not already been added to the request.
2. Select the service type from the Service Type lookup field.

Slide 51 - PDC Special Authorization Requests – Adding Services: Walkthrough (Cont'd)

Slide notes

3. Click Save & Close on the page ribbon to navigate back to the Special Authorization Request. The service will appear on the Requested Services grid with the Pending authorization service status and the request in Draft status.
4. Once all services have been added, click Save on the page ribbon to save changes, then click the Submit button to submit the request.

Please note, if you try to add another of the same service type that is already an authorized service on an Appointment record that is Scheduled, you will get an error message.

Slide 52 - PDC Special Authorization Requests – Adding Services

Slide notes: Upon submission, the Special Authorization Request record will go from Draft to Submitted status. When this happens, you will no longer be able to edit the request.

This record will remain in your PDC's All Special Authorization Requests list view but will also be added to GDSP's Submitted - Special Auth Requests list view for review. Once reviewed by GDSP and all services have a status other than Pending, the status of the Special Authorization Request will be changed from Submitted to Completed and all the services that are in Approved Authorization Service status will appear in the Special Authorization Service sub-grid on the Specimen record.

Slide 53 - PDC Special Authorization Requests - Submitting Requests (Cont'd)

Slide notes: Any denied services will remain on the request record in Denied Authorization Service Status. The relevant specimen's Case Timeline will show a new case note. You can add attachments and notes in the record's Notes and Attachments tab after submission.

Slide 54 - PDC Special Authorization Requests - Submitting Requests (Cont'd)

Slide notes: When you submit the request, the following will occur:

- SIS will save the changes made to the Special Authorization record before submitting the request.
- If no services are added to the Special Authorization Request record, an error message will display.
- If 1 or more services are added, SIS will complete the submission of the Special Authorization Request record.
- If the specimen is already closed and any service is approved on that Specimen record via Special Authorization Request record, then the Specimen record will be re-opened and its status will be updated to PDC Review. If the specimen previously had an associated appointment, it will be in Open sub-status; if not, it will be in New sub-status.

Slide 55 - Remove Special Authorization Requests: Walkthrough

Slide notes: Follow the given steps to delete a Special Authorization Requests record.

1. Navigate to the Requested Services grid of the required Special Authorization Request.
2. Click the Checkbox button for the required request from the list.
3. Click the Delete Services button in the Authorized Services grid to delete the selected Special Authorization Request. Confirm the delete action in the pop-up to remove the services.

Slide 56 - Knowledge Check

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

What is the authorized window for Specially Authorized Services?

Select the correct option.

Slide 57 - Course Summary

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

Slide 58 - Thank You

Slide notes: You have completed this course.

Press the Exit button to leave the course.