SIS2.0 General Functionality Course

Slide 1 - Welcome

Slide notes: Welcome to the SIS 2.0 General Functionality 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.

Slide 3 - Course Introduction

Slide notes: This course provides an overview of General Functionality in SIS 2.0 for all users.

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

Slide 4 - Course Objectives

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

- Define and identify List Views.
- Demonstrate steps to view, sort, filter, and toggle between different List Views.
- Define records for workflows including Case Timeline, Audit Log, and PNS Interpretation History.
- Utilize different search methods like Custom Search, Global Search, Quick Find View, and Advanced Find.
- Illustrate steps to access, view, create, update, and search tasks in Task Management.

Slide 5 - Lesson 1 Objectives

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

At the end of the lesson, you will be able to define and identify List Views.

Slide 6 - Introduction to List Views

Slide notes: List Views are pages that display records in a list format. These views enable you to find, organize, and access records related to Prenatal Screening (PNS) in SIS 2.0.

In this lesson, you will learn to sign in and navigate to a variety of List Views in the new system.

Slide 7 - Application Selection Window

Slide notes: Signing into the SIS 2.0 application will redirect you to the Application Selection Window. The window comprises all the SIS 2.0 applications used by different user roles.

The application tiles visible on your screen is based on your user role.

Slide 8 - Signing In: Walkthrough

Slide notes: To access the Application Selection Window, follow the steps to sign into the SIS 2.0 application.

- Navigate to SIS 2.0 using the link shown on screen
- Enter your Username and Password in the respective fields.
- Click Sign In. You will land on the apps page displaying the warning message to agree to the State of California's authorized use of the system.
- Click I Agree to be redirected to the Application Selection Window displaying the available tiles. The application tiles visible on your screen is based on your user role.

Slide 9 - Signing in: Walkthrough (Contd.)

Slide notes:

- Click your related application tile to access your application.
- You will land on the landing page. If you are a Lab user, you will land on All-TRF List View.
- Select the User Persona on the top left of the screen to return to the App Selection Window. This allows you to quickly toggle between the apps that are assigned to you based on your security roles.

Slide 10 - Navigating to List Views

Slide notes: Most of the Left Navigation menu items, when selected, will bring you to that item's list views. For the purpose of this training, we will focus on Specimens.

- Select Specimens from the Left Navigation menu to navigate to one of the several possible specimen-related List Views.

You will view a list of data on the screen organized in a large grid. This table of data is called a List View. An easy identifier of a List View is a large grid with the absence of a Save button. Click the Refresh button to update the List Views table with the latest information.

Slide 11 - Knowledge Check

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.
Which of the following options is not true about a List View?
Select the correct option.

Slide 12 - Lesson 2 Objectives

Slide notes: Welcome to the Filtering and Sorting List Views lesson of this course.
At the end of the lesson, you will be able to demonstrate steps to view, sort, filter, and toggle between different List Views.

Slide 13 - Introduction to Filtering and Sorting Views

Slide notes: This lesson will help you to filter and sort the various list views available within the new system. This lesson comprises the following topics:
Toggle between List Views, sort, filter, and alter List Views.

Slide 14 - Toggle List Views

Slide notes: An item may have multiple List Views that you can toggle between containing different sets of information.
Let us see how to toggle between different List Views in SIS 2.0.

- Click the Dropdown icon next to the List View Title to see all the available List Views for that item.
- Select one of the list views from the dropdown.
- You will be redirected to the particular List View selected.
- Right click on any of the hyperlinks on a List View. A dropdown will appear.
- Select Open link in new tab to open the record details in a new tab.
- You may also choose to work out of multiple tabs at this point. This is called Tabbed Browsing.
- You can also adjust the column width by dragging the border of column header towards the right.

Slide 15 - Sort List Views

Slide notes: The default sort order for each List View can be changed using the following steps.

- Select a header from the top of a column.
- Select an option available from the dropdown to sort the data as per the requirements.

Slide 16 - Alter List Views - Edit Columns

Slide notes: You can also edit a column of a List View for your current session by performing the following steps.

- Click the table icon called the Edit Columns above the List View grid. The side panel will be displayed to help you change the order of the columns in your view.
- On the Edit Columns panel, rearrange the column headers to your desired order.
- Click Apply to view the changes.

This view will be held until you navigate away from this page unless you open the page in a new tab.

Slide 17 - Alter List Views - Add Columns

Slide notes: You can also add columns to the view by performing the following steps.

- On the Edit Columns panel, click Add Columns to navigate to the Add Columns Window.
- Select the column headers in the available list and click Close. You will be redirected to the Edit Column panel.
- Click Apply to see the added columns in the view. This view will be held until you navigate away from this page unless you open the page in a new tab.

While the functionality exists to add columns, you will mostly need the columns included in your default view.

Slide 18 - Alter List Views - Reset Columns

Slide notes: You can reset the view to default at any time by performing the following steps.

- On the Edit Columns panel, click Reset to Default.
- This view will disappear if you navigate away from the list view. However, you can now work out of multiple tabs or windows simultaneously to maintain your custom views. Again, this is called Tabbed Browsing.

Slide 19 - Filter List Views through Filter By option

Slide notes: Perform the following steps to filter the list view as per the various filter options available.

- Select Filter By from the same column header dropdown to filter the data.
- A small filtering window will be displayed.
- Select the filter parameter from the drop-down list and enter the search criteria.
- Click Apply. Results matching your filter will be shown in the List View grid.

Slide 20 - Filter List View through Funnel

Slide notes: You can use more complex filtering through the Funnel Icon by performing the following steps.

- Click the filter icon named Edit Filters above the list view column headers.
- The Edit Filters form will appear on screen allowing you to enter the desired filtering parameters. This option allows you to enter more levels of refined filtering parameters and criteria.

Slide 21 - Filter List View through Quick Find Views

Slide notes: You can also filter the List Views using quick find views method by performing the following steps.

To quickly find specific information, you can utilize Search This View field above the List View grid. Each list views' search function can only search for pre-defined criteria and will not be able to search data in all columns of that list view. For example, on the All-Specimens List View, you can search for specific accession numbers, but patient names will not yield any results.

Slide 22 - Quick Find Views: Search Parameters

Slide notes: You can use the following search parameters to filter the List Views in quick find view.

Specimen - search by Accession Number

Tasks - search by Task ID

Appointment - search by Appointment ID

Result Proof Review - search by Batch ID or Result ID

PSR - search by PSR ID

Invoices - search by Invoice ID

Reverse Payment PSRs - search by PSR ID

Special Authorization - search by Special Authorization Request ID

Searching for data in columns outside of these identified parameters will not yield any search results.

Slide 23 - Knowledge Check

Slide notes: You have successfully completed this lesson.

Let us check your knowledge with a quick quiz.

Which of the following options can be used to filter a list view in SIS 2.0?

Select the correct options.

Slide 24 - Lesson 3 Objectives

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

At the end of the lesson, you will be able to define records for workflows, including Case Timeline, Audit Log, and PNS Interpretation History.

Slide 25 - Introduction to Record Management

Slide notes: In this lesson, you will learn about the building blocks of SIS 2.0 - Records. Records contain all the information housed in the system and are the core resource for the most workflows.

The main records that most SIS 2.0 users will be interacting with are the Patient Record, Case Record and Specimen Record.

These records will always be linked to one another for easy transitions for related information. A specimen record will always be tied to a patient and case record. The only difference between these records is the data that they contain, and the other records that they link to, which can be determined by the name of that record.

Slide 26 - Core Records

Slide notes: Every List View has rows of data. Each row may contain multiple interconnected or related records.

- Double click the record row in a list view or click one of the hyperlinks in the record row to navigate to the respective links' record.
- You can also access records from any hyperlink location in the system (identified by blue text), most notably other records.

Slide 27 - Patient Records - Summary Tab

Slide notes: Perform the following steps to view the Patient Records.

- You can see the Patient Details card with the name of the patient hyperlinked at the top of the specimen record. Click the Patient Name to navigate to the patient record associated with this specimen record.
- On the patient record, you will land on the Summary tab containing information related to that specific patient. You can view the Patient Details card, Patient Address, Cases, and Specimens grid.

Slide 28 - Patient Records - Related tab

Slide notes: In the Related tab, you will have access to any related Services, Appointments, Special Authorization Requests, Mailer details, and Potential Matches, from the tabs at the top of the record.

Slide 29 - Case Records - Summary Tab

Slide notes: Summary tab is a way to see a holistic view of pregnancy details, the different sections that users can view based on their role and responsibility. This tab includes the Case card with the hyperlinked Case ID number. Perform the following steps to view information in the Case Record.

- Click the Case ID Number to navigate to the Case Record.
- On the Case Record, you will see the information related to that specific case on the cards and grids including: Patient Details card, Case Details card, Gestational age card, Test Results grid, Associated Clinicians grid, Appointments grid, Services grid, Special Authorization Requests grid, and Patient Service Reports grid.

Slide 30 - Case Records - Additional Tabs

Slide notes: You can also view other tabs such as the Timeline tab, related PNS Mailer Details, and Audit History, which can be selected from the Related tab.

Slide 31 - Case Timeline

Slide notes: Let us see how to navigate and access Case Timeline.

- 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.
- Click the plus icon (+) on the record to add Tasks.
- The email and fax activity options will not perform any actions in SIS, so please disregard their use.
- You may also add Notes to the timeline via this icon.
- 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 32 - Audit Log

Slide notes: You can access Audit History from the Specimen, Patient, and Case records under the Related tab of each record. This Audit Log will display the actions taken on each of the records it is associated with over the lifetime of the record to date.

Slide 33 - Specimen Records - Summary Tab

Slide notes: Let us see how to navigate and access Specimen records.

- From the All-Specimen List View, click a hyperlinked Accession Number from the grid to navigate to the specific Specimen records.
- On this record, you will see a number of cards and grids containing information related to the specimen on the Summary tab.
- Scroll down or across the page from the scroll bar on the right to see different cards and grids.
- The specimen record will show you Patient Details card, Specimen Event card, Results card, MSAFP Results card, Specimen Details card, Services grid, Special Authorization Requests grid, Appointments grid, All Case Specimens grid, Clinician Details card, Tasks grid, and Payor Information grid.

Slide 34 - Specimen Records - Additional tabs

Slide notes: There are also additional tabs on the record including Pregnancy Information, PNS Interpretation History, and a Related tab which contains views such as CCC Workload, Audit History, and Specimen Results.

Slide 35 - Specimen Records - Pregnancy Information Tab

Slide notes: Perform the following steps to navigate through the Pregnancy Information tab of Specimen Records.

From the Pregnancy Information tab, you can see the Patient, Case, and Specimen Interpretation Factors card.

Slide 36 - Specimen Records - PNS Interpretation History Tab

Slide notes: On the PNS Interpretation History tab, you can view if a reinterpretation has been conducted on that specimen. Perform the following steps to navigate through the PNS Interpretation History tab of Specimen Records.

This tab will show the history of all SIS screening results related to that specimen including the initial interpretation and any subsequent reinterpretations that may occur.

The current interpretation will appear at the top of the list. The current results will also show on the Results card of the Specimen record.

Slide 37 - Specimen Records - Related Tab

Slide notes: Perform the following steps to navigate through the Related tab of Specimen Records.

- The Related tab shows three options - CCC Workload, Audit History, and the Specimen Results.
- The CCC Workload tab shows the history of CCC associations related to that specimen.
- The Audit Log will show a record of every action taken on the fields of that specimen record to date.
- Lastly, the Specimen Results page will display any screening result that the specimen has undergone.

Slide 38 - Knowledge Check

Slide notes: You have successfully completed this lesson.

Let us check your knowledge with a quick quiz.

Which of the following are the primary records that users will interact with SIS 2.0?

Select the correct option.

Slide 39 - Lesson 3 Objectives

Slide notes: Welcome to the Search Methods lesson of this course.

At the end of the lesson, you will be able to utilize different search methods, like Custom Search, Global Search, Quick Find View, and Advanced Find in SIS 2.0 application.

Slide 40 - Introduction to Custom Search

Slide notes: Custom Search is a method that allows for targeted searching based on the specific desired record type that you are searching for in SIS.

Custom Search results will only return information that you have access to view. This feature is not a part of all the apps in SIS 2.0.

Slide 41 - Custom Search - New Search

Slide notes: Perform the following steps to use Custom Search method to search results.

- Select Search from the Left Navigation menu. You will land on the Custom Search screen with the Search card and the Search Results grid.
- On Custom Search Results screen, enter the search parameters and click the Search button. Any search results will appear in the Search Results section.

Slide 42 - Custom Search - New Search

Slide notes:

- Click Reset button to clear all the search parameter fields along with the search results.
- Searches can be conducted based on partial entries on the Last Name and First Name fields only. The partial search will display results, only if searching using the following options: Begins with and Ends with.

Slide 43 - Custom Search - View Search - Demonstration

Slide notes: Let us see how to use Custom Search to view search results in SIS.

- When there is a search result, click the Last Name to navigate to the Patient record.
- You will be redirected to the Patient record displaying the Patient Details.
- Click an Accession Number on the search result.
- You will be redirected to the Specimen record.
- Click the PNS Form number to navigate to the related TRF record.
- If there are no search results found, No Search Results Found message will appear below the search results grid.
- Please note that your search results will be limited to the data that you have access.
- In case you need multiple results outputs in Custom Search, this is a good instance to use Tabbed Browsing.

Slide 44 - Introduction to Global Search

Slide notes: The second search method we will cover in this course is Global Search. This search method will help you quickly find the information in SIS 2.0 without navigating through list views and records. The search field is conveniently located at the top of the application page no matter what screen you are viewing.

Search across SIS for any records containing the search criteria entered that could be related to a number of different records. This is a less targeted searching approach.

Slide 45 - Global Search

Slide notes: Perform the following steps to Global Search.

Click Search field with the Magnifying Glass icon on the blue Microsoft Dynamics ribbon.

Slide 46 - Global Search: Search Parameters

Slide notes: Enter the search parameters in the search field. You can search for records based on any or the combination of the specified search parameters mentioned below.

- Search for Patient Record by Patient Last Name or First Name
- Search for Specimen Record by Accession Number or TRF.
- Search for Case record by Case ID.
- Search for Appointment record by Appointment ID.
- Search for Special Authorization Requests by Request ID.
- Search for Task record by Task ID.
- Search for PSR record by PSR ID.

Searching data in other columns than the criteria mentioned on the screen will not yield any search results.

Slide 47 - Global Search - Search Related Results

Slide notes: Suggested or related results will appear underneath the search field according to the information entered. Perform the following steps to search related results.

- Select one of the options from the results appearing to be redirected to the selected record.
- In case the desired results do not appear in the dropdown, you can also select Show More Results For your search data or press Enter on your keyboard to navigate to the search results page.
- Any matching results will appear on a new Search Results page displaying Top Results and record-specific organized results.

Slide 48 - Filter Global Search Results

Slide notes: Perform the following steps to use the Quick Search method.

- If there are many results, click the collapsed Filters side panel to apply filters or sorting criteria to refine your results.
- Select the desired option to reflect the desired results in the results view.

Slide 49 - Quick Find Views

Slide notes: You can also search results using Quick Find Views method by performing the following steps.

To quickly find specific information, you can utilize Search This View field above the List View grid. Each list view search function can only search for pre-defined criteria and will not be able to search data in all columns of that List View. For example, on the All-Specimens List View, you can search for specific accession numbers, but patient names will not yield any results.

Should the three other search methods not satisfy your search needs, feel free to utilize the Advanced Find button for advanced and complex queries.

Slide 50 - Knowledge Check

Slide notes: You have successfully completed this lesson.

Let us check your knowledge with a quick quiz.

Which of the following are the valid options to Search data in SIS 2.0?

Select the correct options.

Slide 51 - Lesson 5 Objectives

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

At the end of the lesson, you will be able to:

Illustrate steps to access, view, create, update, and search tasks in Task Management.

Slide 52 - Introduction to Tasks List Views

Slide notes: Tasks will help you to stay on track with different work activities by allowing you to see not only what work items are coming up but also what has been completed.

In SIS 2.0, tasks also help to bring any important changes with specific record to user's attention. For example, a task notifying that the specimen has been reassigned to a different PDC or CCC.

Tasks can be either system generated, or user created.

Slide 53 - Open Tasks List Views

Slide notes: Perform the following steps to access various Task List Views.

- Select Tasks from the Left Navigation menu to access the Task List View. This view is also accessible via Global Search or other records like Specimen records via the Task ID. The Task List can be accessed in two different views:
    - Open - Tasks List View - The sort order for this view is set as ascending by due date (determined by creation date) as a default view. This view shows all of the open tasks associated with your specific log in. You will have Filter, Refresh, and Export options on this view.

Slide 54 - Closed Tasks List Views

Slide notes:

- Closed - Task List View - This view shows all of your closed or completed tasks.
  Click the Downward Arrow next to the List View title. Select Closed - Tasks List View from the dropdown to view the closed or completed tasks.
  You can sort the list view Filter, Refresh, and Export options. The default sort order for this view is set as descending by completed date.

Slide 55 - Task Creation from Left Navigation menu

Slide notes: You can also create a New Task from the Left Navigation menu.

Let us see how to use this functionality in SIS.

- Click New Task button on the ribbon to land on the New Task Record page.
- Enter the details in the following fields:
  - Subject: The title of the task.
  - Description: Information that will provide more details around the task.
  - Assigned To: Displays the user to whom the task is assigned to.
  - Regarding: A related record such as a Specimen, Patient, Case, PSR, Appointment, Special Authorization, TRF, etc.
- This will set the task status to Open and assigned to you as shown by your name in the Assigned To field.
- You may assign tasks to others by entering their information in the Assigned To field.
- On the Regarding field, you can open a Look Up Search menu to link the task to a particular record within certain record tables that you have access to.
- After all of the required information is entered, click Save & Close.
- You will be redirected to the Open - Tasks List View page. Click the newly created task to land on the New Task Record page.
- Click Mark Complete option on the Standard Ribbon Bar to update the activity status as complete on the Task Record.

Slide 56 - Task Creation from Specimen Record

Slide notes: You can also create a task specifically related to a specimen from the Specimen Record's Tasks section.

Perform the following steps to create task from Specimen Record.

- Select Specimens from the Left Navigation menu.
- Double click a Specimen from the list to navigate to the respective Specimen Record. Scroll down the window to move to the Task section.
- Click New Task to open the Quick Create Task side window allowing you to create a task automatically regarding the specimen as identified by the accession number.

Slide 57 - Update Tasks

Slide notes: Perform the following steps to update tasks.

- Select the task record from the Open - Tasks list view to update the task.
- Edit the fields and click Save at the top of the page.

Slide 58 - Task Completion

Slide notes: Perform the following steps to complete a task.

- When you have completed a task, you can navigate to Open - Tasks List View.
- Click the desired Task ID to open the task record and select Mark Complete from the standard top ribbon.

As soon as the task is marked complete, it will be added to your Closed - Tasks List View and will show the completed date. Tasks cannot be reopened and are read only once closed.

Slide 59 - Knowledge Check

Slide notes: You have successfully completed this lesson.

Let us check your knowledge with a quick quiz.

Which of the following is a valid option to enter a New Task in SIS 2.0?

Select the correct option.

Slide 60 – Course Summary

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

- You can customize your view by filtering, sorting, managing columns and toggling between different list views
- The customization view will disappear if you navigate away from the list views
- While you can access many different records, you will mainly access the primary records - Patient, Case, and Specimen
- You can utilize different search methods available in SIS 2.0 like Custom Search, Global Search, Quick Find View, and Advanced Find
- Tasks will help direct work actions and stay organized.

Slide 61

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