GDSP PNS Logistics Unit

Slide 1 - Welcome

Slide notes: Welcome to the SIS training for GDSP PNS Logistics Unit staff and admins!
Click the Begin Course button or press Enter on the 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: The PNS Logistics Unit course provides an overview of the core day-to-day activities for GDSP PLOG staff. While a specific functionality in SIS depends on user security accesses, this course introduces the common functionalities available to GDSP PLOG staff.

Slide 4 - Learning Objectives

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

- Manage Patient and Case records, navigate to each type of record, and perform the required actions based on your role
- Manage Specimen records, list views, interpretation factors and adequacy codes, manage specimen events, and create specimen record related tasks
- View appointment list views and monitor their status
- Navigate to TRF list views and filter to view them

Slide 5 - Learning Objectives (Contd.)

Slide notes:

- Access and export BI reports
- Manage Entities in SIS
- Review results proofs and approve or reject mailers

Slide 6 - General Records Lesson Objectives

Slide notes: Welcome to the General Records lesson. At the end of the lesson, you will be able to Manage Patient and Case records, navigate to each type of record, and perform the required actions based on your role.

Slide 7 - GDSP Dashboard

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.

As a PLOG user, click on the PNS - GDSP app tile to access the landing page to begin.

Slide 8 - Types of GDSP Records

Slide notes: Records are pages in SIS with detailed information related to a specific subject. You can access the following types of records:

- Patient records: Can be accessed from the selected patient's Patient Details page
- Case records: Can be accessed from the selected case's Case Record page
- Specimen records: Can be accessed from the selected specimen's Specimen page
- Appointments: Can be accessed by selecting the required Appointment ID from the Appointments page
- TRFs: Can be accessed by selecting the required PNS Form number from the TRFs page

Slide 9 - Patient Records

Slide notes: You can navigate to the Specimens list view and either select the patient's name from the list view or the specimen record to navigate to the patient record.

If you know the patient's name you can also perform a global or custom search to quickly access the record.

On the patient record, you can view the following sections:

- Patient Details
- Patient Address
- Cases
- Specimens

Slide 10 - Create Patient Address: Walkthrough

Slide notes:

1. Click the patient's hyperlinked name in the Patient Name field of a specimen record to access the patient record.
2. Click the New Patient Address button on the Patient Address grid to navigate to the New Patient Address page.
3. Complete all required fields, which are identified by red asterisks.
4. Once all fields are filled, click the Save & Close button on the top of the form.

You will now see the new address on the patient record along with the previous address. When a new address is added, the previous address will be end-dated with the start date of the new address.

Slide 11 - Case Records

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

- Patient Details
- Case Details
- Appointments
- Services

Slide 12 - Knowledge Check 1

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.
What are all the options available to access a patient record?
Select all that apply.

Slide 13 - Specimen records and List Views Lesson Objectives

Slide notes: Welcome to the Specimen Records and List Views lesson
At the end of the lesson, you will be able to Manage Specimen records, list views, interpretation factors and adequacy codes, manage specimen events, and create specimen record related tasks.

Slide 14 - Specimen Records

Slide notes: Specimen records contain all the details associated with a specific specimen in SIS.

Slide 15 - Specimens List Views

Slide notes:

1. All - Specimens List View: This view displays all specimen records regardless of the specimen status. This view can be accessed by selecting All - Specimens from the drop-down icon next to the current view header.
2. CCC 40 - Specimens List View: This view displays all open specimen records that have been assigned to GDSP for further processing based on their associated adequacy codes. This view can be accessed by selecting CCC 40 - Specimens from the drop-down icon next to the current view header.

Slide 16 - Specimens List Views (Cont'd)

Slide notes:

3. Closed - Specimens List View: This view displays all specimen records that no longer require case management. This view can be accessed by selecting Closed - Specimens from the drop-down icon next to the current view header.
4. Headline - Specimens List View: This view displays all headline specimen records that coordinators need to address. This view can be accessed by selecting Headline - Specimens from the drop-down icon next to the current view header.

Slide 17 - Tabs in a Specimen Record

Slide notes:

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 Interpretation Factors.

Slide 18 - 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 one 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.

We will now learn about the edits and updates that you can make in the Summary and Interpretation Factors tabs.

Slide 19 - Updates in the Summary Tab

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

1. Specimen events
2. CCC assignments
3. Payor information
4. Specimen Record related tasks

Let us learn about each in detail.

Slide 20 - Updating Specimen Events: Walkthrough

Slide notes: You can use the Specimen Event field under the Specimen Event section of the Summary tab to enter Coordinator notes. The notes could be related to a Confirmation of Contact (CoC) 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 & 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 21 - 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.

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.

Slide 22 - Viewing Payor Information: Walkthrough

Slide notes: The Summary tab will display Payor Information as the last section in the Specimen record. You will have view access to all details and can scroll to view the details. Perform the following steps to view existing payor information:

1. Click the Payor ID in the Payor Information grid of the Summary tab to navigate to the Payor record.
2. Scroll to the Payor Information section to view the Insurance Policy details.

Slide 23 - Edits and Updates in the Pregnancy Information tab

Slide notes: Your day-to-day activities may require you to edit or update the available information in the Pregnancy Information tab of a specimen record. You can edit any of the unlocked fields on the following three sections:

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

Please Note:

- Screening results or interpretations are associated with specific result mailer types and any changes will impact the generated mailer.
- 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.

Slide 24 - Editing Adequacy Codes: Walkthrough

Slide notes: In this section you will learn how to change the adequacy code of a specimen, so that the latest 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 analyte type, either MSAFP or cfDNA, and appropriately assign adequacy codes.

Slide 25 - Knowledge Check 2

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 - Appointments Lesson Objectives

Slide notes: Welcome to the Appointments lesson. At the end of the lesson, you will be able to view appointment list views and monitor their status.

Slide 27 - Appointments List View

Slide notes: All - Appointments list view is the only appointment list view available for GDSP users and provides Filter, Refresh, and Export options.

- 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.

Slide 29 - Knowledge Check 3

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.
What are the appointment statuses visible for Appointments List Views?
Select all that apply.

Slide 30 - TRFs Lesson Objectives

Slide notes: Welcome to the Test Requisition Forms (TRFs) lesson. At the end of the lesson, you will be able to navigate to TRF list views and filter to view them.

Slide 31 - Overview of TRF Record

Slide notes: A TRF is the digitized form of a prenatal screening order that was placed with a provider at the provider's facility. This form is the core source of information for all other records in SIS 2.0.

- The TRF records are organized by rows into their own list view. To access the TRF records, select TRF from the Left Navigation menu.
- You will land on the TRFs List View, which is the default view and displays the TRFs without any filters. x

Slide 32 - TRF Statuses

Slide notes: The following TRF statuses can be viewed from the TRF landing page by filtering the list by status:

- Specimen Processed: eTRF has created a specimen record in SIS
- Result Available: SIS has processed the result file for the TRF

Slide 33 - Link Unmatched Documents to a TRF Record: Demonstration

Slide notes: You can match unparented scanned documents to an existing TRF order from a given Link Order Documents record. Let us see the steps to link unmatched documents to a TRF record.

1. Navigate to the Timeline tab to view the attached documents of a TRF form.
2. Click Link Order Documents from the Left Navigation Menu.
3. Select the desired record from the Active Order Documents List View.
4. Lookup an existing TRF number to move the scanned documents from the Active Order Documents record to the TRF record.
5. Click Save on the page ribbon to update the changes.
6. SIS will display a message on the confirmation dialog box to confirm the move. If you click Yes, SIS will move the associated note items to the TRF record and the notes will be deleted from the Link Order Documents record.

The Link Order Documents record will be updated to Inactive and the record will no longer be viewable in the Active Order Documents List View and will be moved to the Inactive Order Documents List View. If you click No, SIS will clear the TRF field so you can search another TRF number.

Slide 34 - Knowledge Check 4

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.
Which of the following is not a specimen order status?
Select the correct option.

Slide 35 - Report Management Lesson Objectives

Slide notes: Welcome to the Report Management lesson. At the end of the lesson, you will be able to access and export BI reports.

Slide 36 - 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 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 37 - GDSP GDL Reports

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

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

Slide 38 - GDSP Administrator Reports

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

- Inadequate Specimens with Values Posted

Slide 39 - GDSP Leads Reports

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

- Count of Headline Cases

Slide 40 - GDSP Lab Reports

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

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

Slide 41 - 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 42 - 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 43 - Knowledge Check 5

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 44 - Entity Management Lesson Objectives

Slide notes: Welcome to the Entity Management lesson. At the end of the lesson, you will be able to manage Entities in SIS.

Slide 45 - Introduction to Entity Management

Slide notes: 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 a part of the program and has specific roles in it.
The following entities are available for management in SIS:

- PDCs
- CCCs
- NAPS, cfDNA, Cytogenetic, and Cytogenomic Labs
- Persons or non-users, clinical persons that are actively providing services

- Clinicians
- Facilities which are Clinicians' practice locations

Please note: If Clinician or Clinician Contact entities are created in CalGenetic Portal, they cannot be modified in SIS by any user.

Slide 46 - Overview of Entity Management

Slide notes: The management process is the same for all the listed entities. Managing SIS Users is a protected process that will not be covered in this course.

For the purposes of this training, we will use CCCs and PDCs as examples, but remember this process is the same for:

- Lab
- Person
- Clinician
- Clinician Facilities.

Slide 47 - Navigate to Entity Management

Slide notes: You have access to a dedicated Entity Management application.

1. Select the Entity Management app tile from the application selection screen.
2. Alternatively, if you are currently working in a different app and need to change apps, click the title of the app you are currently working from. You will be redirected to the application selection screen to select the Entity Management app.
3. Upon selecting, you will land on the Clinician list view.

Slide 48 - Entity List Views

Slide notes: Available list views will be determined by the entity you are managing.

1. Select CCCs from the Left Navigation menu. You will land on the Case Coordinator Centers list view, which is the default view.
2. Use the dropdown arrow to toggle between different list views.

Slide 49 - View and Modify Entity Address Details: Demonstration

Slide notes: Let us see how to view and modify Entity Address Details in SIS 2.0.

1. In a PDC record, scroll down the page to view the associated PDC addresses in address grid
2. Click an existing Address Record in the Address grid. You will be redirected to the PDC address record. You can edit unlocked fields in this record.
3. Navigate back to the PDC record to create a new address record.
4. Click the New PDC Address button on the PDC address grid.
5. Enter the required information.
6. Click Save & Close to view the address in address grid.

Slide 50 - Persons Entity Overview

Slide notes: The Persons entities that you can manage include:

- Consultative Sonologists
- Amniocentesis Practitioners
- PDC Directors
- Genetic Counselors
- Clinical Geneticists
- Transabdominal CVS Practitioners
- Transcervical CVS Sonologists

You can also update or add license information for Persons from the License grid on a Persons entity record.

Slide 51 - View and Modify Records: Walkthrough

Slide notes: Perform the following steps, to view and modify records:

1. Either double click the row or click the name of the CCC to select a CCC entity record.
2. Select a CCC entity record to view or edit the information, such as the address, to ensure that the record is kept up to date.
3. Click Save & Close on the page ribbon to save the changes.

Please note: Unlike PLOG users, CCC 40- only users cannot create records.

Slide 52 - Creating New Entity Record: Walkthrough

Slide notes: Perform the following steps to create a new entity record.

1. Click the New button from the page ribbon on either a CCC list view or a CCC entity record to create a new CCC record.
2. Enter the required details, identified by the red asterisks.
3. Click Save & Close on the page ribbon to save the changes.

Slide 53 - Person Relation Record Creation: Walkthrough

Slide notes: Perform the following steps to create a Person Relation record in the Entity Management app:

1. Click Persons from the Left Navigation menu. You will land on the Consultative Sonologists list view.
2. Select the required option.
3. Navigate to the Person Relations grid and click the New Person Relation button.
4. In the Person-Relationship section, enter the Person's role, the associated PDC, and the effective start date. Include the effective end date, if known.
5. Click Save & Close to save the changes. The new connection is now established in SIS.

Slide 54 - Knowledge Check 6

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.
Which of these entities has a unique management process?
Select the correct option.

Slide 55 - Mailer Review and Management lesson. Objectives

Slide notes: Welcome to the Mailer Review and Management lesson. At the end of the lesson, you will be able to review results proofs and approve or reject mailers.

Slide 56 - Introduction to Results Mailer Generation

Slide notes: For every screening result, a mailer will be generated that will be sent to the ordering Provider.
There are different mailer types for different analyte types and the content of the mailer is determined by the results, positive or negative.

Slide 57 - PNS Result Mailer Navigation: Walkthrough

Slide notes: Perform the following steps to navigate to the PNS Results:

1. Click the Related tab of the specimen record.
2. Select Specimen Results from the Related tab to navigate to the Related Results Mailer page. Any associated mailers, if they have been created, will be displayed here in a grid.
3. The following columns will be visible in the PNS Results page:
    - Result ID
    - Result Type
    - Trigger Date
    - File Date
    - Result Status
4. Click the Result ID to view the PNS Result details.

Please note: Mailers must be checked every day before 10 A.M. Pacific Time.

Slide 58 - Review Mailer Proofs: Walkthrough

Slide notes: Each day before 10 A.M. you will need to review and approve or reject the result mailers generated in SIS by mailer type. Mailer types are categorized by specimen type, either MSAFP or cfDNA, and screening result, either Negative or Positive. This review is conducted to ensure accuracy and financial responsibility of GDSP, as well as ensure timely delivery of mailer results to Providers. Perform the following steps to review and approve / reject mailers.

1. Select the Result Proof Review link from the Left Navigation menu.
2. A list of individual mailer results will be displayed that have a Proofing Status as Pending under the Result Batches Pending Review List View.
3. Click the individual Result ID and navigate to the Timeline tab of the Patient's PNS Result record.
4. Click the hyperlinked attachment to view the PDF version of the mailer for review.
5. Repeat until all mailers in the batch have been reviewed. Once the review is complete you are ready to either approve or reject each mailer in that batch.

Slide 59 - Approval of Mailers: Demonstration

Slide notes: Let us see how to approve a result in SIS 2.0.

1. Hover on the Result Proof Review List and select a record from the list.
2. Click the blank Radio button.
3. Click the Approve button that appears on the standard ribbon bar. A warning message will be displayed asking for confirmation to approve all the results in the selected mailer type.
4. Click the Yes button on the popup to approve all the results of that mailer type.
5. All results that have been approved will be removed from the Result Mailer Types Pending Review List view. These results will be viewable in the Approved/Rejected Mailer Types list view.
6. Click the Result ID of the Approved Mailer Result to navigate to the PNS Result record. When a mailer type is approved, the Proofing Status field will be set to Approved in the corresponding results records, and the Proofing Status field will be set to Review Completed in the corresponding batch record, if all mailer types in that batch are set to either approved or rejected.

   SIS will capture your username and date when the result was approved in the Reviewed By and Reviewed Date fields.

   Approved mailers will be sent daily by mailer type to be printed offsite.

Slide 60 - Rejection of Mailers

Slide notes: Let us see how to reject a result in SIS 2.0.

1. Hover over the Result Proof Review List and select a record from the list.
2. Click the blank Radio button.
3. Click the Reject button from the ribbon bar. A warning message will be displayed asking for confirmation to reject all the results in the selected mailer type. A textbox label will ask you the Reason for Rejection as a mandatory field to fill.
4. Enter the text detailing the reason for rejection.
5. Click Yes on the popup to reject all the results of the same mailer type within that batch. If you click No on the popup all the results of the same mailer type within any given batch will not be rejected.
6. The Reason for Rejection field will show on the result records that were rejected.

Once a mailer type is rejected, the Proofing Status field will be set to Rejected in the corresponding results records, and the proofing status will be set to Review Completed in the corresponding batch record if all mailer types in that batch are set to either Approved or Rejected.
SIS will capture your Username and Date when the result was Approved or Rejected on the result record. This data will be captured in the Reviewed By and Reviewed Date fields, respectively.

Slide 61 - Mailer Address Exception List

Slide notes: You will need to ensure that exceptions are resolved to not block the mailer approval process. When information is not valid, SIS will prevent the processing of associated mailers until the data is corrected and valid. You will be able to review the exception records in a variety of ways.
You can resolve exceptions from the Clinician Addresses tab in the Left Navigation menu.

Slide 62 - Resolving Address Exception Records: Walkthrough

Slide notes: Perform the following steps to resolve address exception records from Mailer Proof Review.

1. Select Result Proof Review from the Left Navigation menu.
2. Click the Batch ID of the desired mailer batch to view the Batch Log record.
3. Scroll to the Batch Log Exception grid of a batch log record to view any exceptions related to the records in the batch, including bad addresses.
4. To resolve, click the Batch Log Exception ID to view the exception.

Slide 63 - Resolving Address Exception Records: Walkthrough (Cont'd)

Slide notes:

5. On the Batch Log Exception page, you will be able to navigate to the Clinician Entity record by clicking on the Clinician Name on the Record card at the bottom of the page.
6. This will navigate you to the clinician address record where you can update the fields of the address and click the Valid Address checkbox to confirm validation of the address.
7. Click Save or Save & Close.

Once the address has been corrected and validated, the associated mailer will be picked up with the next batch.

Slide 64 - Resolving Address Exceptions from Results Proof Review

Slide notes: Let us see how to resolve address exception records from Clinicians' Addresses in SIS 2.0.

1. Select Clinician Addresses from the Left Navigation menu. You will land on the Invalid Clinician Contacts list view.
2. Select an Invalid Clinician Address record.
3. Update the address to correct.
4. Mark the Valid Address checkbox to confirm the address has been validated by you.
5. Click Save & Close on the page ribbon to save the updated address.

This process can be done at any time to prevent address exceptions from occurring ahead of reviewing and approving mailer types.

Slide 65 - Cancelling Results Mailers

Slide notes: Let us see how to cancel the result mailers in SIS 2.0.

1. Select a Result record from the list.
2. Click the Cancel Result button on the sub grid header of the Specimen Results.
   The Result Status will be updated as Cancelled.

When the result in any status other than Pending is selected, and the Cancel Results button is clicked, SIS will display the error message highlighting that only the result mailers in Pending status can be cancelled.

Slide 66 - Confirmation of Contact: Walkthrough

Slide notes: Perform the following steps to view and generate 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 of Inadequate MSAFP Specimen.
   Upon selecting specific specimen events, the Confirmation of Contact field will automatically populate with text. This will give you an opportunity to enter free text Coordinator Notes in the field immediately below.

Slide 67 - 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 68 - Knowledge Check 7

Slide notes: You have successfully completed this lesson of this course. Let’s check your knowledge with a quick quiz.
Which of the following options can be used to resolve mailer address exception records in SIS 2.0?
Select all that apply.

Slide 69 - Course Summary

Slide notes: Let us look at the key takeaways from this course.

Slide 70 - Thank You

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