

## **v4 Provider or Patient Portal New Features**

- Developed ability for Risk Clinic user to [choose lab of interest as the first step](#) when documenting a genetic test result

## **v4 Provider or Patient Portal Enhancements**

- [Updated v4 Provider Portal dashboard](#) by moving 'Status' and 'Has Previous Assessment' columns and converting values into icons
- Added ability to search as the Risk Clinic user types a gene panel name within the Genetic Testing details form to document a genetic test result
- Enhanced known family mutation test form so a Risk Clinic user can add or remove variants as needed
- Improved the text format on CRA templates for patients who meet NCCN HBOC or Lynch Syndrome guidelines
- Updated appointment feed logic where an appointment is not counted as 'Complete' if the patient completed a Patient Portal questionnaire but later cancels or reschedules.
- Updated Provider Portal dashboard fonts that represent 'More Quick Actions'

## **v4 Provider or Patient Portal Issue Corrections**

- Updated two commercial gene panels to include gene, RECQL
- Ensured edits made to relative names does not impact patient name

## **Tips, Tricks or Training Notes**

- The "Status" and "Has Previous Assessment" columns on the v4 Provider Portal dashboard have moved and the data is represented by icons. The meaning of the data has not changed.

### Previous Dashboard

Date and Time	Patient Name	MRN	DOB	Appointment Provider	Visit Number	Accession Number	Clinic Name	Referring Provider	Status	Has Prev. Assessm...	Quick Actions
05/07/2021 08:05 AM	TestCE754Save, Ashley	99904202106	09/23/1970				Stars Hollow Genetics Clinic		In Progress	No	
05/03/2021 08:06 AM	TestGroupComment, Holly	99904202107	09/23/1970	Who, Doctor			Stars Hollow Genetics Clinic		Completed	No	
05/03/2021 08:04 AM	TestBreastRisk, Genesis	99904202105	09/23/1970				Stars Hollow Genetics Clinic		In Progress	No	
05/03/2021 08:03 AM	TestPrevExisting, Ashley	99904202104	09/23/1970				Stars Hollow Genetics Clinic		Completed	No	
04/09/2021 08:00 AM	TestBreastRisk, LIAE2	99904142101	09/23/1970				Stars Hollow Genetics Clinic		Completed	No	
04/27/2021 08:08 AM	TestBreastRisk, Vanessa	99904202109	09/23/1970	Aggar, Virginia			Stars Hollow Genetics Clinic	Wilens, Nick	New	No	
04/26/2021 08:09 AM	TestBreastRisk, Carla	99904202110	09/23/1970	Who, Doctor			Stars Hollow Genetics Clinic	Yang, Cristina	New	No	
04/23/2021 08:01 AM	TestBreastRisk, Lindsay C64140	99904062102	09/23/1970				South Park's Grace Hospital		In Progress	No	

### v4.210808 Dashboard

S	P	Date and Time	Patient Name	MRN	DOB	Appointment Provider	Visit Number	Accession Number	Clinic Name	Referring Provider	Quick Actions
<input type="checkbox"/>	<input type="checkbox"/>	07/09/2021 08:00 AM	TestP, Sevan	99907232101	09/23/1970				South Park Grace Hospital		
<input type="checkbox"/>	<input type="checkbox"/>	07/09/2021 08:01 AM	TestAmmer, Lindsay	99907232102	09/23/1972				South Park Grace Hospital		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/19/2021 08:00 AM	TestCenturiaCM1, Sierra NCCN...	99907192101	09/23/1980				South Park Grace Hospital		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/10/2021 08:00 AM	TestGroupEdit, Clare Comment...	99907102101	09/23/1970				Stars Hollow Clinic		
<input type="checkbox"/>	<input type="checkbox"/>	06/25/2021 08:00 AM	TestNCCNv2.2021, Tony	99906252101	09/23/1970				South Park Grace Hospital		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	06/22/2021 08:01 AM	TestNCCNv2.2021, Victoria	99906232102	09/23/1970				Stars Hollow Clinic		
<input type="checkbox"/>	<input type="checkbox"/>	06/22/2021 08:00 AM	TestNCCNv2.2021, Claudia	99906232101	09/23/1970				Stars Hollow Clinic		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	06/11/2021 08:00 AM	TestRelease, Chelsea	99906112101	09/23/1970				South Park Grace Hospital		

Users can always hover over the new column headers and icons to reveal their definitions.

"S" column header represents risk status. (The previous column header was "Status")



- Check mark indicates risk assessment is "Completed". The meaning has not changed. Anytime a clinician exits out of the patient record and back to the dashboard or if a patient completes a questionnaire, an appointment status changes to 'Completed'. If the user does not calculate risk and returns to the dashboard, the appointment will also be set to 'Completed.' A patient who declines risk assessment will still be counted as 'Complete' unless staff member actively changes the status through a Quick Action.



- Incomplete circular dots indicate risk assessment is "Incomplete". Previously, this was labelled as 'In Progress'. The meaning has not changed. This may happen if provider is in middle of documenting the record or patient is in midst of completing a questionnaire. This may also happen when a staff uses Quick Action "Mark as Incomplete", or if provider exits out of patient record by closing the browser without returning to the dashboard.



- Asterisk indicates risk assessment is "New". The meaning has not changed. All appointments, either created manually or by an appointment feed, will start as "New". The patient record has not been touched.

Risk status is significant if you utilize CRA v4 Clinic Reports.

"P" column represents whether the appointment is for a patient who had previously completed a risk assessment. (The previous column header was "Previous Risk Assessment")

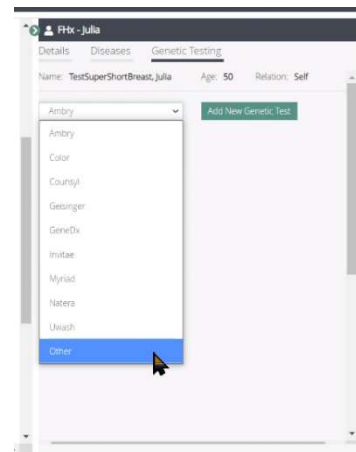


- Open circle indicates "No," the patient has not previously completed risk assessment.

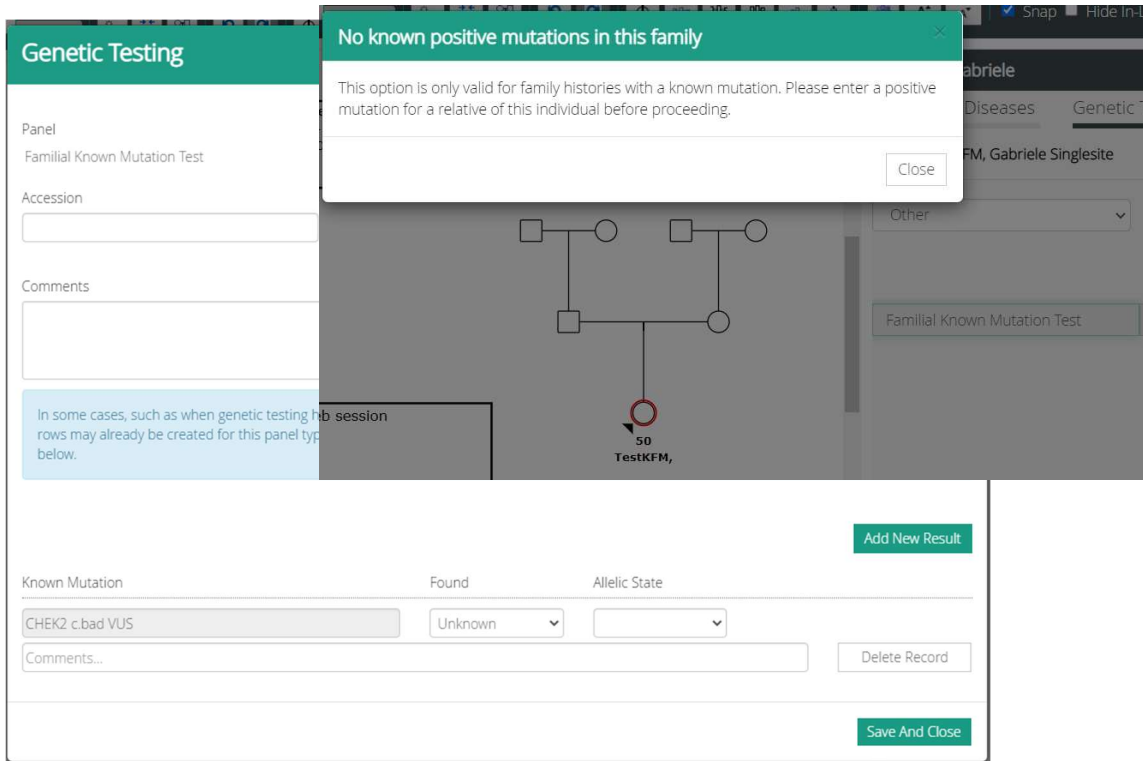


- Closed circle indicates "Yes," the patient has previously completed risk assessment.

- The Genetic Testing feature has moved away from outcome based panels. Risk Clinic users can now select the genetic lab of interest then search through a list of associated panels to document genetic test results. Generic single site or multi-gene panels that are not affiliated with a specific lab will fall under the 'Other' category.



- Risk Clinic users have more flexibility to modify family known mutation (FKM) panels. The clinician can delete variants that may run in the family but was not tested or add variant results that were not entered originally into the Pedigree.



The screenshot displays the 'Genetic Testing' interface. A modal window at the top center reads: 'No known positive mutations in this family. This option is only valid for family histories with a known mutation. Please enter a positive mutation for a relative of this individual before proceeding.' Below the modal is a pedigree chart with a red circle around the proband, labeled '50 TestKFM'. The interface includes a form with the following fields:

- Panel: Familial Known Mutation Test
- Accession: [Empty text box]
- Comments: [Empty text box]
- Known Mutation: CHEK2 c.bad VUS
- Found: Unknown
- Allelic State: [Empty dropdown]
- Comments...: [Empty text box]

Buttons include 'Add New Result', 'Delete Record', and 'Save And Close'. A blue tooltip on the left states: 'In some cases, such as when genetic testing has already been performed, rows may already be created for this panel type below.'

At a minimum, users are still required to document at least one family variant prior to adding a know familial mutation panel for the proband. If not, an error message will appear.

Finally, the update sets the stage for CRA v4 to receive FKM genetic test results from commercial laboratory partners.