Release Notes 4. 20210808

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

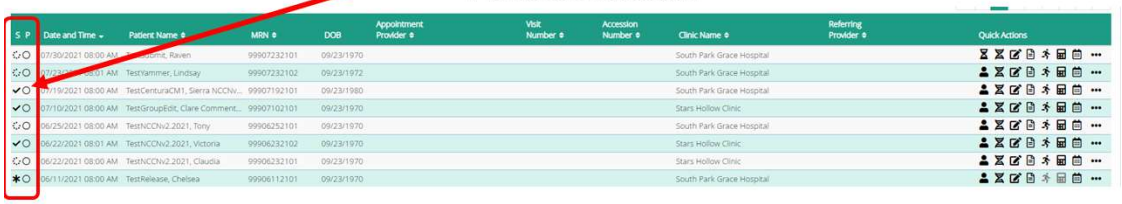
- Updated two commercial gene panels to include gene, RECQL
- Ensured edits made to relative names does not impact patient name

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

v4.210808 Dashboard



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.

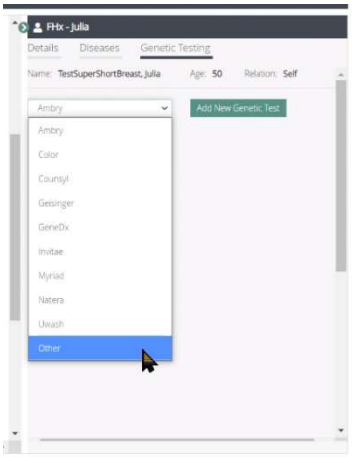
Risk status is significant if you utilize CRA v4 Clinic Reports.

“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”)

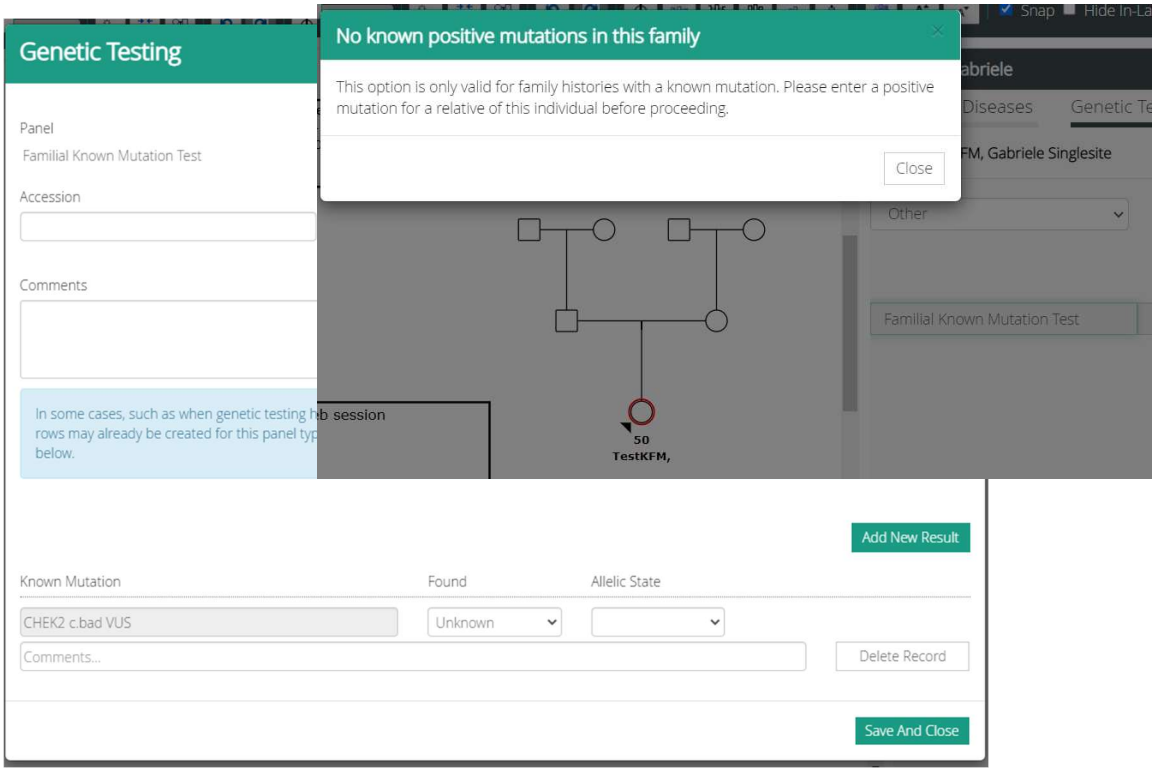
- Open circle indicates “No,” the patient has not previously completed risk assessment.

- 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 affililated 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.



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 form commercial laboratory partners.