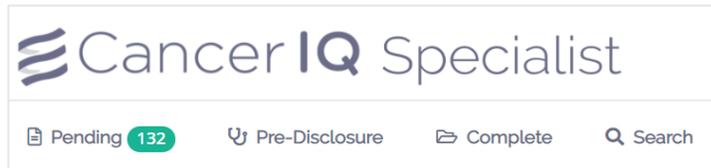


## Table of Contents

Navigating the Specialist Dashboards.....	2
Sorting a Dashboard:.....	2
Patient Actions Button:.....	2
View and Edit Patient Information: .....	2
View and Edit Family History: .....	4
Order Genetic Testing:.....	6
Entering Test Results.....	9
View Patient Risk Models & Assessment.....	10
Assign Care Plans .....	11
Generating Reports.....	12
Send and View CancerIQ Letters/Reports in the Cerner Application .....	13
To Send Reports to the Cerner App: .....	13
To View Reports to the Cerner App: .....	13
To Save Reports in Cerner Chart:.....	14
Move Patient Case to Complete .....	15

Navigating the Specialist Dashboards

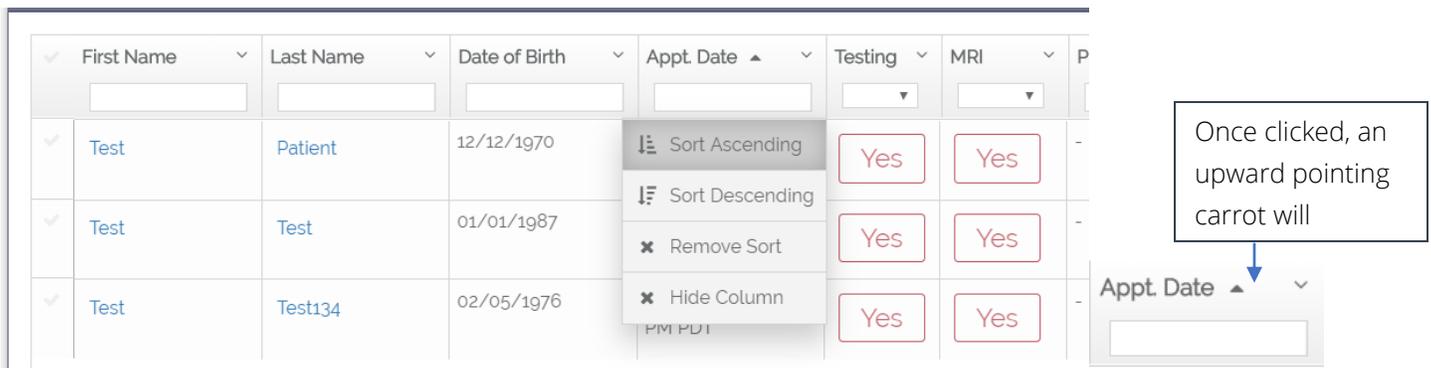
There are 3 different dashboards in CancerIQ Specialist - Pending, Pre-Disclosure, and Complete



- When a patient is marked as Interested after screening, they are automatically placed in Pending
- If a test is ordered, the patient is automatically moved to Pre-Disclosure
- The patient will move to the Complete dashboard when they are marked as complete
- You can search across all three dashboards using the Search tab

Sorting a Dashboard:

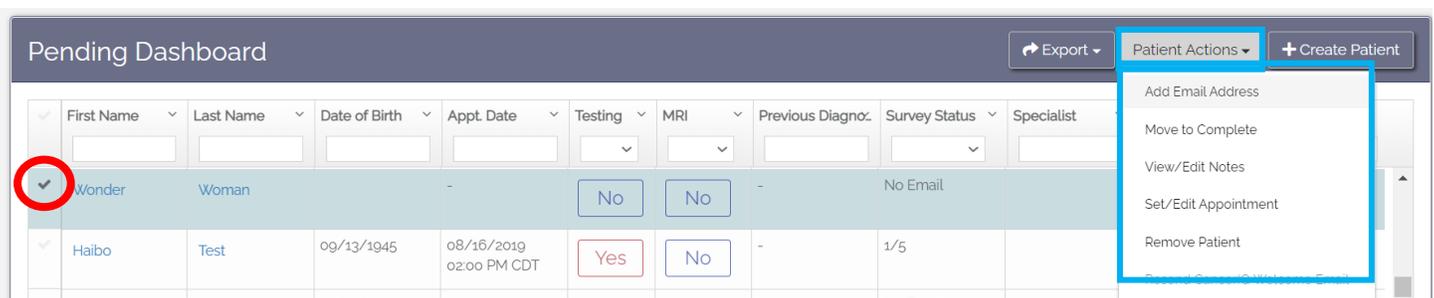
Patients are ordered chronologically based on when they are first moved to this stage. To see the dashboard by a certain column, click on the column and sort accordingly:



Patient Actions Button:

The Patient Actions button will allow you to add an email address, set/edit appointment time, and move patients to complete from the dashboard.

➔ To open the Patient Actions button, click to the left of the patient to highlight their row



Find the patient on the Specialist dashboard and click on their name to open the Patient Details page.

Pending Dashboard									
✓	First Name	Last Name	Date of Birth	Appt. Date	Testing	MRI	Previous Diagnosis	Survey Status	Spe
✓	Wonder	Woman	11/05/1984	-	Yes	Yes	-	Complete	

Choose “Start Appointment” or “Review Patient Case” in the pop-up box

- ➔ If the patient is present, we suggest clicking Start Appointment to help track no-show rates



From the **Patient Details** page, you can edit, add, or verify patient information.

- ➔ To edit information on this page, click the orange **Edit** button and click **Save** once finished

**Wonder Woman** 36 yo | Female

Start Appointment

📄 Patient Details
👤 Family History
🧪 Testing
📊 Risk Assessment
📄 Care Plan
📄 Generate Reports

Admin Information

-

MRN:	N/A
Master Patient Index:	N/A
Referral Date:	N/A
Referring Physician:	N/A
Referring Physician NPI:	N/A
Referring Physician TIN:	N/A
Referring Physician Address:	N/A
Referring Physician Phone Number:	N/A
Referring Physician Fax:	N/A
Counselor Name:	N/A
Location:	CancerIQ - Dev
Patient Email:	N/A
Patient Address:	N/A
Patient Phone Number:	16085551234
Insurance Provider:	N/A
Insurance Plan Name:	N/A
Insurance Member ID:	N/A
Notes:	N/A

Edit

View Family History

Manage Appointments

[View and Edit Family History:](#)

Click the **Family History** tab to view and edit the patient’s family cancer history

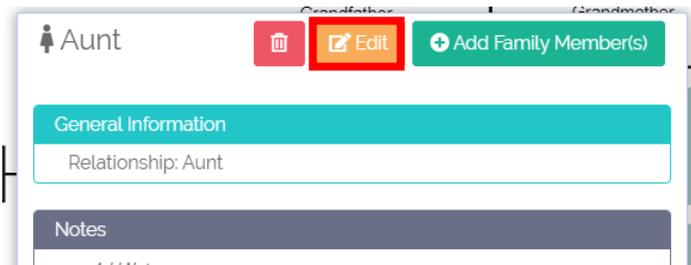
➔ **To add a family member**, select the relative on the pedigree and click **Add Family Member**

The screenshot shows the 'Family History' interface for Jane Doe, 49 yo | Female. The pedigree chart displays the maternal side with a maternal grandfather having Colorectal Cancer (46-50) and a mother having Ovarian Cancer (51-60). Jane Doe is shown as the daughter of the mother. A red box highlights the 'Add Family Member(s)' button in the pop-up for the mother. On the right, there are sections for 'Patient Testing Eligibility' (HBOC, Lynch Syndrome) and 'Other Testing Candidates' (Mother had Ovarian Cancer at age 60, Maternal Grandfather had Colon or Rectal Cancer at age 50).

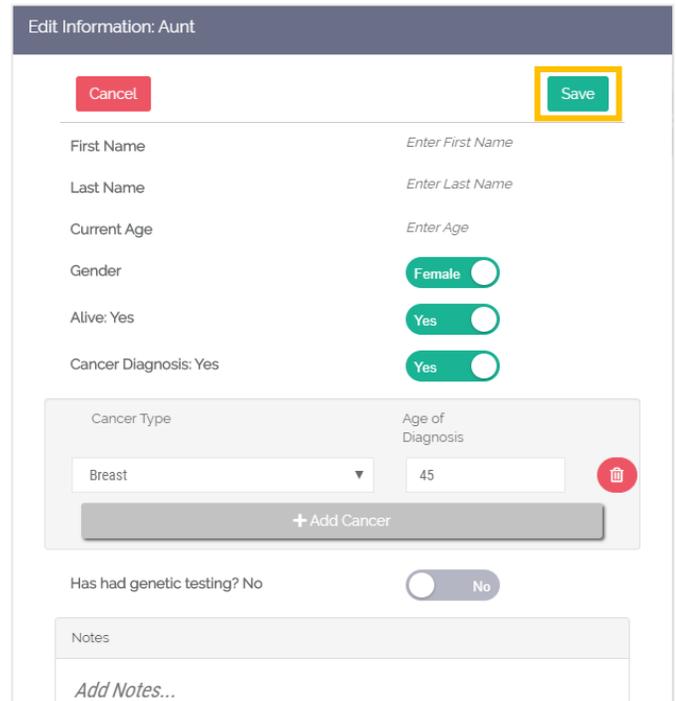
➔ **Select the relative type(s) and number you want to add and click Add Family Member.**

The screenshot shows the 'Add Family Members to Mother' dialog box. It contains a grid of relationship options: Brother, Sister, Paternal Half Brother, Paternal Half Sister, Son, Daughter, Maternal Half Brother, Maternal Half Sister, Twin Brother, and Twin Sister. A red box highlights the 'Add 0 Family Members' button at the bottom right.

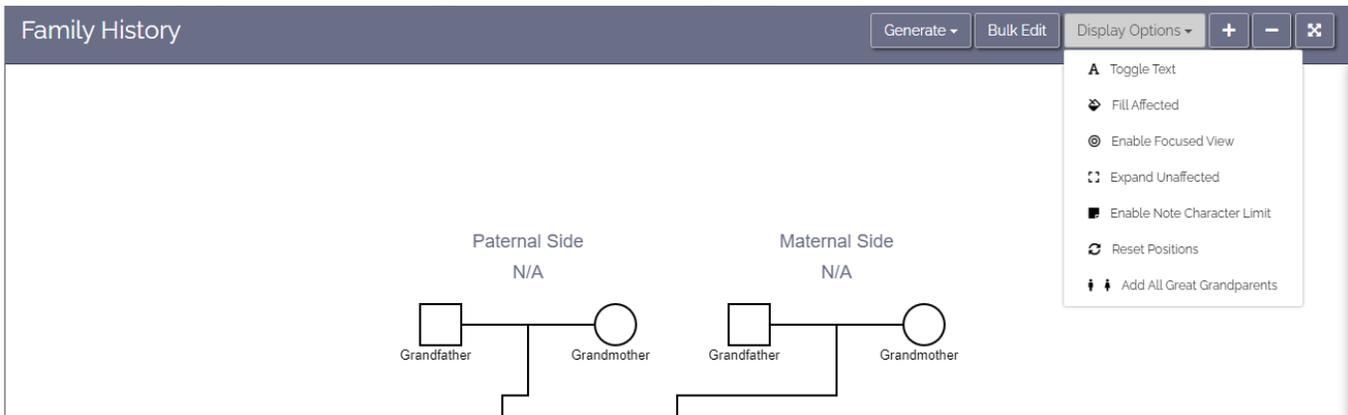
→ To edit or add a cancer diagnosis, select the family member on the pedigree and click **Edit**



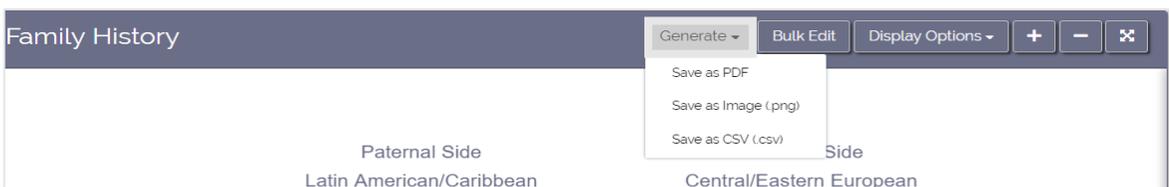
- Slide Cancer Diagnosis On/Off
- Enter a Cancer Type and Age of Dx
- You can also leave a note, edit/add name or age, and mark alive/deceased from this window
- Click **Save** when finished



Use the **Display Options** menu to toggle between different pedigree views:



To save or print the pedigree, click “Generate” and select one of the options:



Order Genetic Testing:

**Step 1:** To order genetic testing, click on the **Testing** tab

- **Note:** If you can't click on the tab, go to Family History and click the large blue button on the right-side that says "Patient Date is Complete" to unlock test ordering.

Wonder Woman 36 yo | Female

Patient Details   Family History   **Testing**   Risk Assessment

**Testing Decision**

HBOC Eligibility Order Test?

Wonder meets the criteria for HBOC testing [Details](#)  Test

- From the Testing page, scroll down to the Test Selection box and select your vendor
  - Next, select the test to be ordered from the options listed under "Select Test".
    - Click the text box to generate a TRF
    - Click the three vertical dots in the text box to Skip TRF and log the test as ordered

**Test Selection**

Differential Diagnosis

Primary: HBOC      Secondary:  +

Select Vendor

Ambry Genetics      **Invitae**      Color Genomics      Labcorp

EGL Genetics      Myriad Genetics

Other Vendors

Select Test

BRCA1 and BRCA2 STAT Panel  
BRCA1, BRCA2

Lynch Syndrome Panel  
EPCAM, MLH1, MSH2, MSH6, PMS2

**Breast and Gyn Cancers Guidelines-Based Panel**  
ATM, BRCA1, BRCA2, BRIP1, CDH1, CHEK2, EPCAM, MLH1, MSH2, MSH6, NBN, NF1, PALB2, PMS2, PTEN, RAD51C, RAD51D, STK11, TP53

Melanoma Panel  
BAP1, BRCA2, CDK4, CDKN2A, MITF, POT1, PTEN, RB1, TP53

WHO IS THE ORDERING PHYSICIAN?

Self Referring Physician Other

Select physician

HOW WILL THE TEST BE PAID FOR?

Insurance Billing Institutional Billing Patient Payment

Do not start testing until my patient approves payment terms regarding estimated out-of-pocket costs?

No Yes

PATIENT HISTORY

Prior Genetic Testing, IHC, or MSI?

No Yes

Will patient management be changed depending on the test results?

No Yes

Is this a STAT patient?

No Yes

**Step 3:** If you ordered from **Myriad, Ambry, Invitae, or EGL:** TRF will auto-populate and open DocuSign

- Click the check mark that you agree, and then click the yellow “Continue” button

Please read the Electronic Record and Signature Disclosure.

I agree to use electronic records and signatures.

**CONTINUE** OTHER ACTIONS ▾

- Next, you will have the option to sign electronically for the patient or provider. If you would like to use electronic signature, scroll through the document and click **Sign**. Click the yellow **Finish** button in the top-right corner when complete

**6. Billing/Payment Information**

**OPTION 1: BILL INSURANCE** (Please attach copy of authorization/referral)

Name of Policy Holder: Test Test DOB: 12 / 12 / 1960 (MM/DD/YYYY)

Insurance ID#: \_\_\_\_\_

Signature: Test Test (Patient/Responsible Party)  Self  Spouse  Child  Other

Authorization/Referral: \_\_\_\_\_ DATE: 9/28/2020 (MM/DD/YYYY)

**Sign** (Optional)

**Reminder: Include a copy of BOTH SIDES of your insurance card(s).** If you submit more than one card, indicate which is primary.

I understand that Myriad will contact me if I am financially responsible for any non-covered service. To be considered for the Myriad Financial Assistance Program, please provide the following information: annual household income \$ \_\_\_\_\_ Number of family members in household \_\_\_\_\_

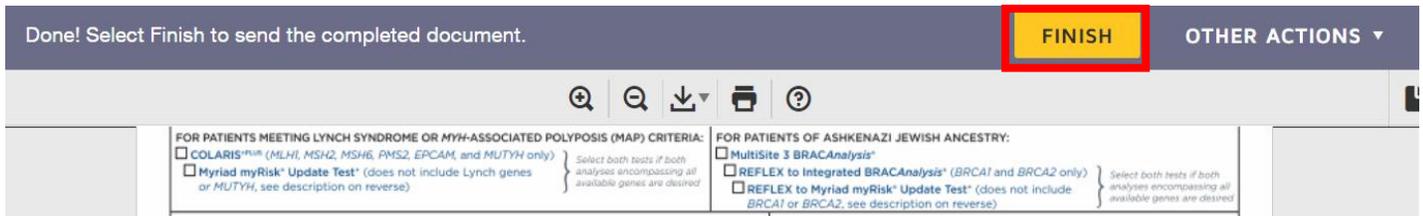
**OPTION 2: PATIENT PAYMENT** (Please call Customer Service for questions regarding test prices or for credit card payment)

**OPTION 3: OTHER BILLING** (To establish an account, submit billing information with this form)

Bill our institutional account #: \_\_\_\_\_ or established research project code #: \_\_\_\_\_ or Authorization/Voucher #: \_\_\_\_\_

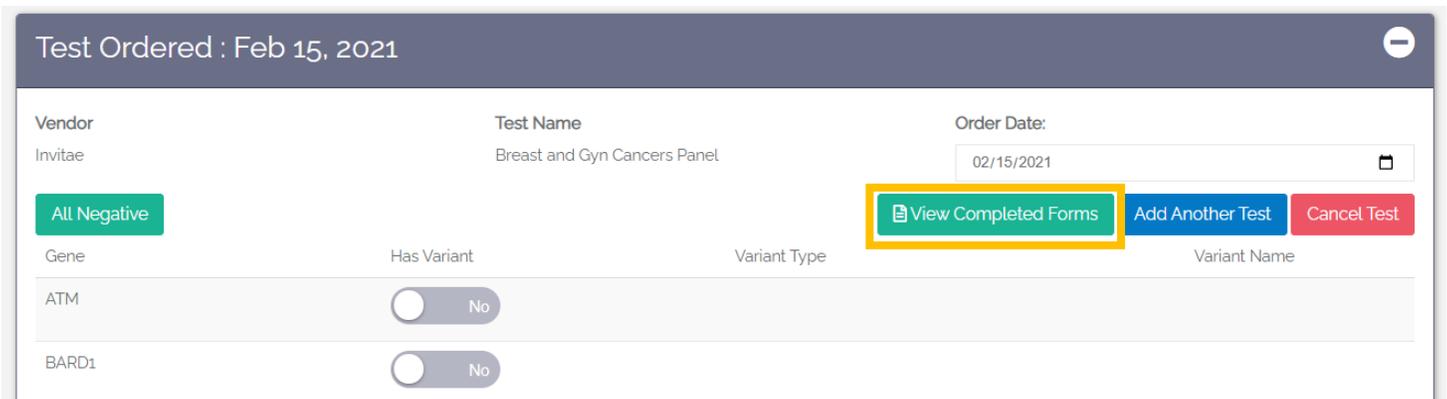
MYRIAD GENETIC LABORATORIES, INC. A CLIA Certified Laboratory

➔ If you do not want to sign electronically, click the yellow **Finish** button



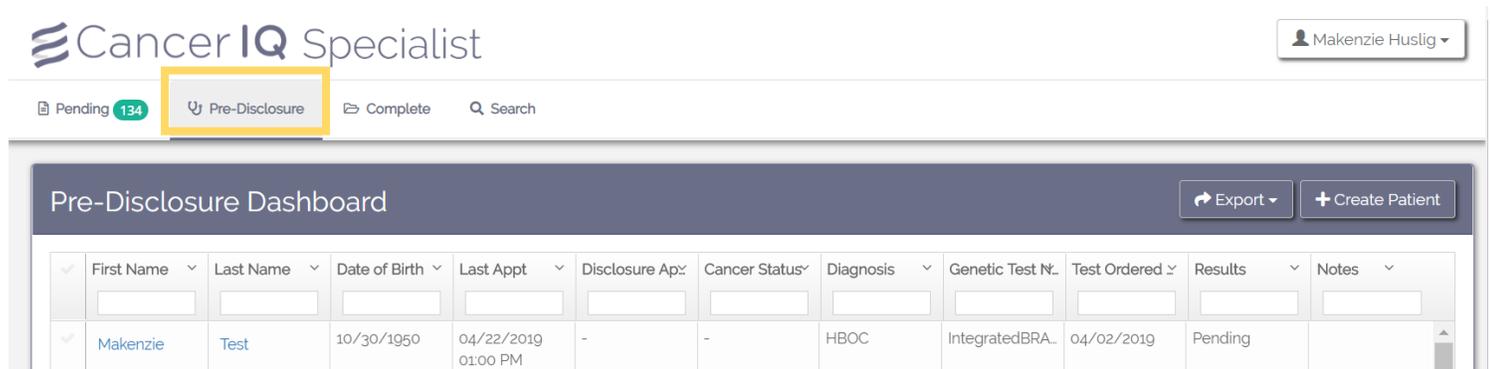
Depending on the lab selected, DocuSign may reload and give you the opportunity to have the provider now sign electronically. **Repeat the steps above according to your preference.**

**Step 4:** After clicking Finish, you will return to the CancerIQ Testing page. Scroll down to the Test Ordered Window and click **View Completed Forms** to download and print the completed TRF.



Entering Test Results

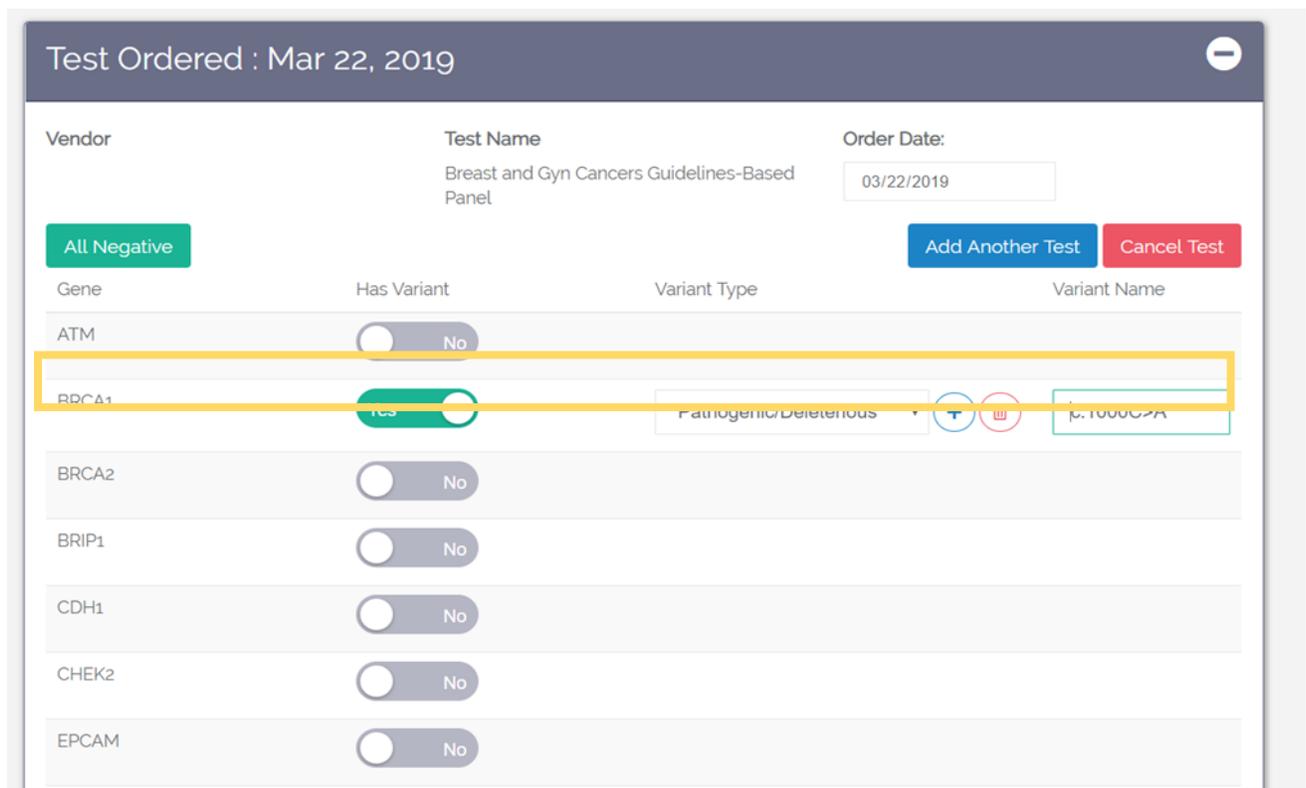
→ Find the patient on the Pre-Disclosure dashboard and click on their name



→ Scroll to the **Test Ordered** box and enter the patient’s genetic testing results.

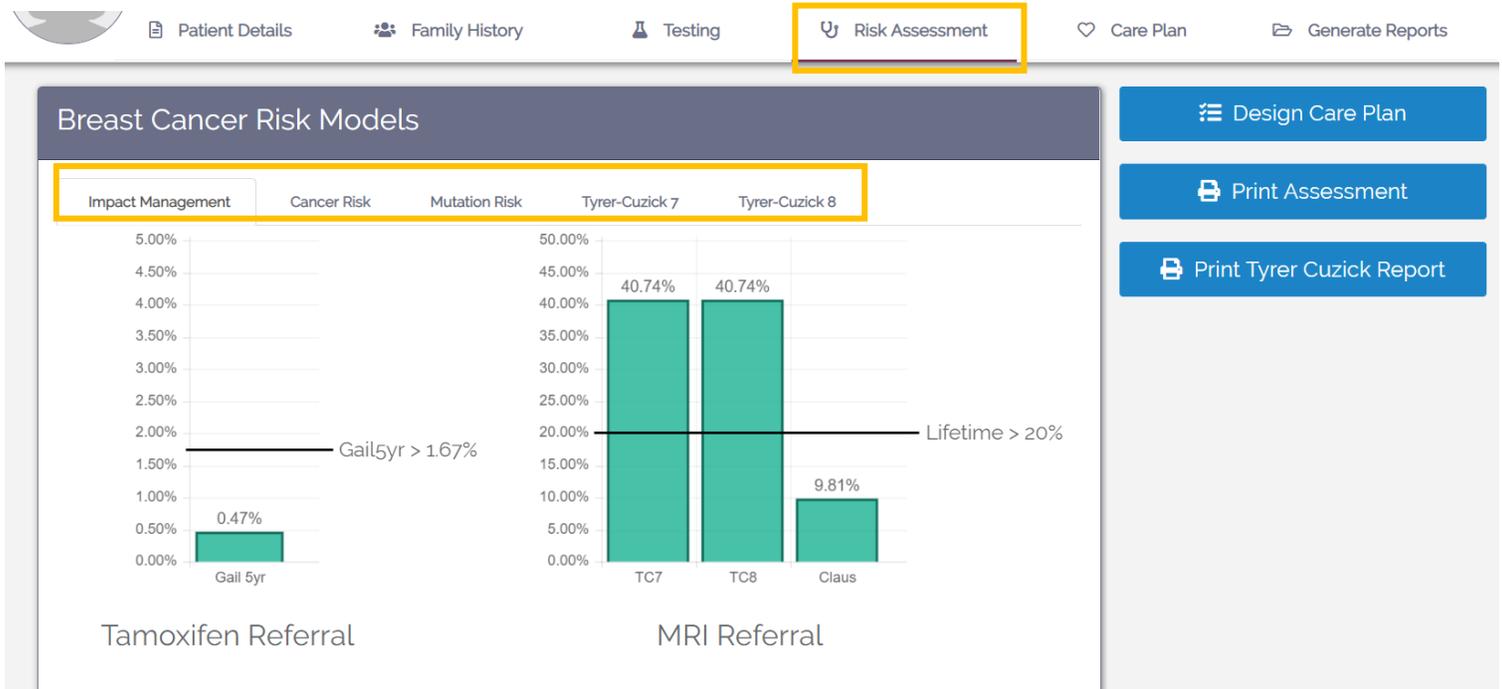
- Find the appropriate gene and slide Has Variant to YES
- Select the variant type and enter the variant name

→ Click **Save** at the bottom of the gene list.

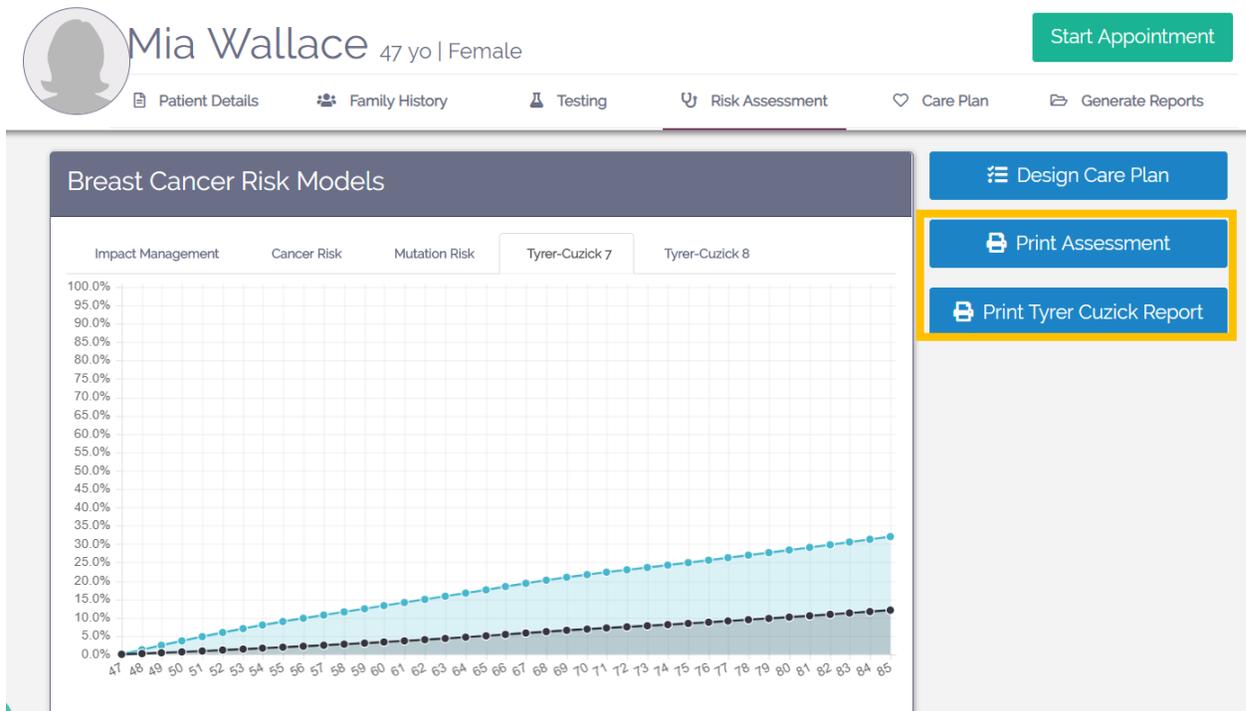


[View Patient Risk Models & Assessment](#)

Click on the Risk Assessment tab to view risk models calculated for the individual patient. You can click between the different risk models by clicking each of the tabs.



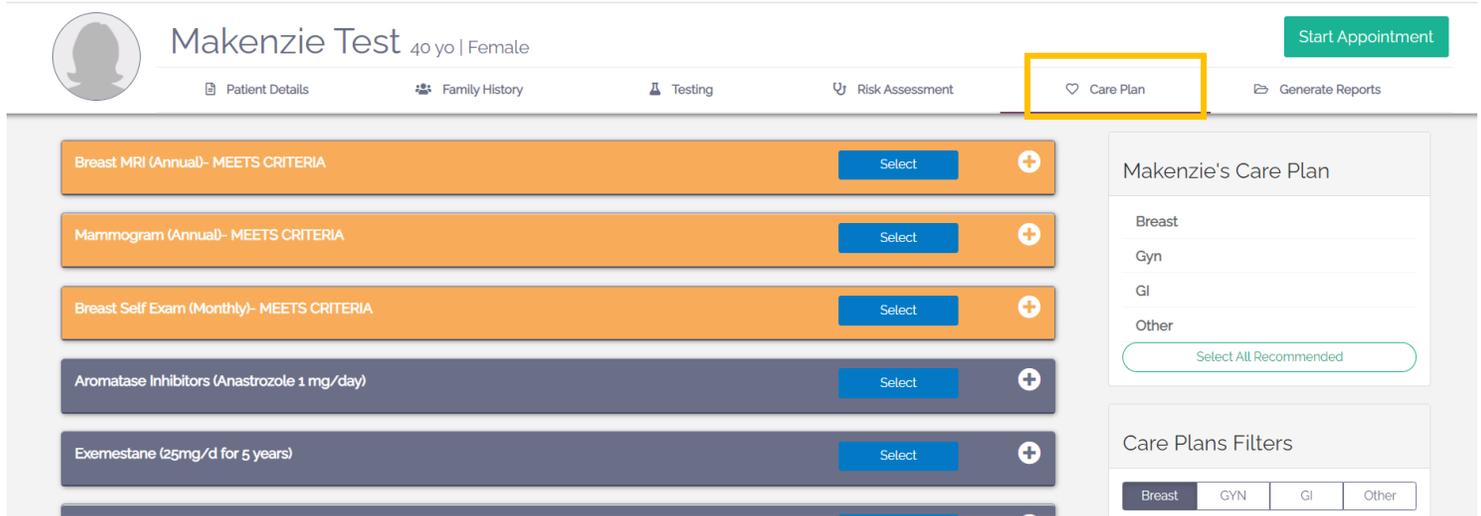
If you would like to download or print a patient’s risk assessment, scroll to the top of the page and click the “Print Assessment” or “Print Tyrer-Cusick Report” button.



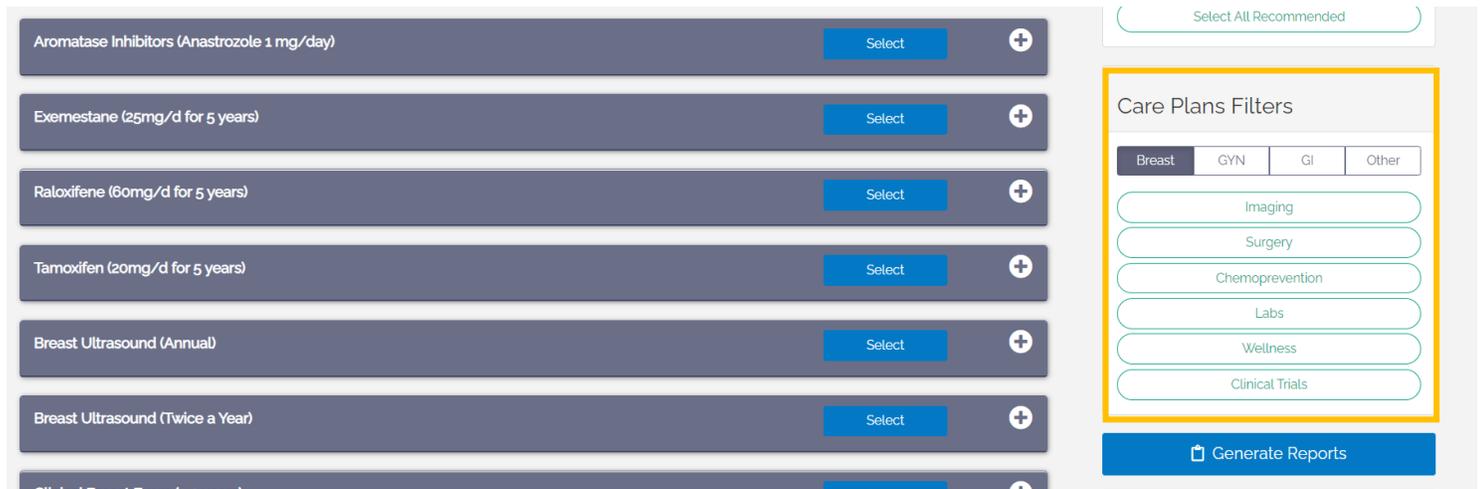
Assign Care Plans

Click the Care Plans tab to recommend medical management changes

- ➔ Click **Select** to assign the care plan
  - Note: If the care plan is orange, the patient is eligible based on NCCN Guidelines
- ➔ Click the **+** sign to open the care plan details and add a note



➔ To view care plan options by category, you can click one of the options under “Care Plan Filters”



Selected care plans will display in the “Patient’s Care Plan” panel and in CancerIQ reports generated for patient and provider.

Assigning a care plan to a patient will automatically upload the patient into the CancerIQ Manager for future care plan tracking and automated reminders.

Generating Reports

Click the Generate Reports tab to generate documentation, clinical notes, and the MRI referral letter

➔ Click the **For Patients** folder to generate:

- Patient Letters
- Family Letter
- Patient Education
- Patient Data Summary

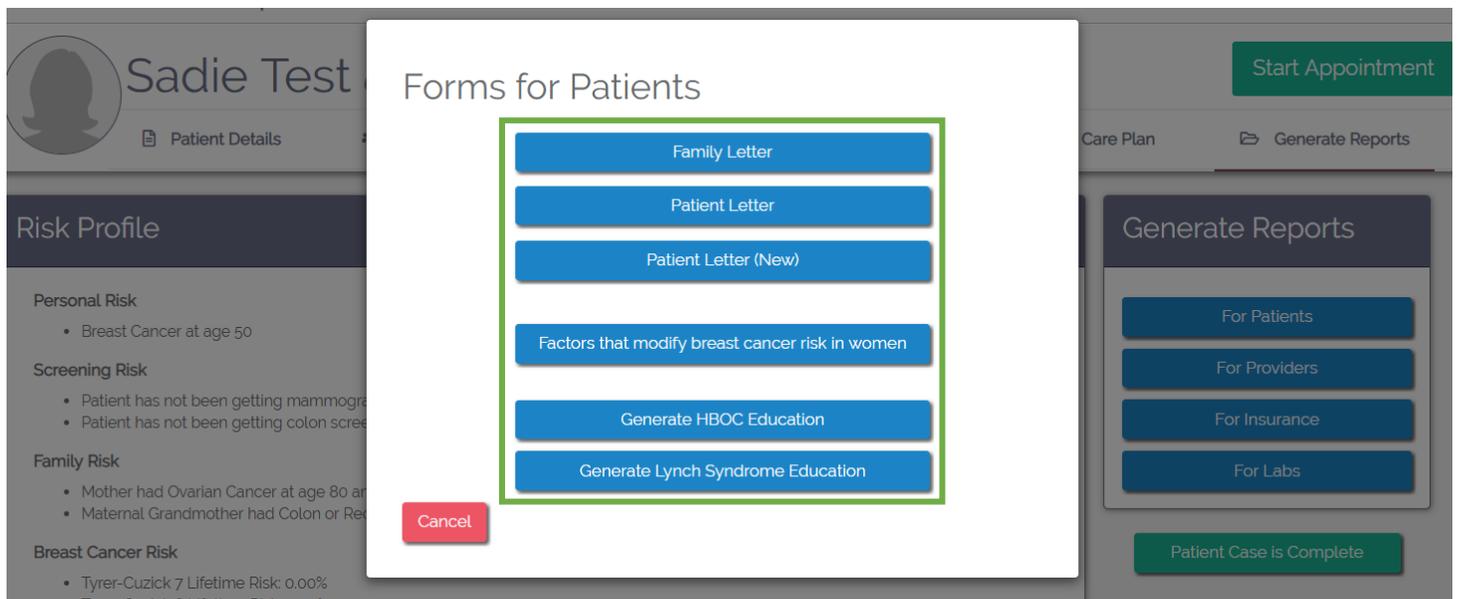
➔ Click the **For Providers** folder to generate:

- Initial Consult Note
- Follow Up Consult Note

➔ Click **For Insurance** to generate an LMN or Breast MRI Referral



To generate a report, click one of the blue buttons in the box. Select a report from the pop-up list.



Reports will be auto-populated using the patient’s information in CancerIQ. They can be edited, saved, downloaded, printed, or copy/pasted into your EMR.



Send and View CancerIQ Letters/Reports in the Cerner Application

All CancerIQ letter and report templates must be generated in the CancerIQ Specialist. Once generated, these versions are viewable from the CancerIQ Cerner Integration App.

**To Send Reports to the Cerner App:**

- ➔ Generate and edit the desired template from the CancerIQ Specialist. Once the template is edited (if applicable), select **Save to CancerIQ** in the Specialist.

Edit
Save to CancerIQ
Download to PDF

**YOUR  
LOGO  
HERE**

January 13, 2021  
**Re:** Iowa Test  
**Date of Birth:** 04/04/1997

Dear Medical Director:

I am writing this letter on behalf of my patient, Iowa Test, to request coverage for genetic testing. This letter is to urge you to provide coverage for medically indicated genetic testing for the above named patient. The personal and/or family history on the test requisition form raises significant concern for genetic testing of possible mutations. I have determined that this test is medically necessary for the above patient due to the following risk factors which are suggestive of this condition:

**To View Reports to the Cerner App:**

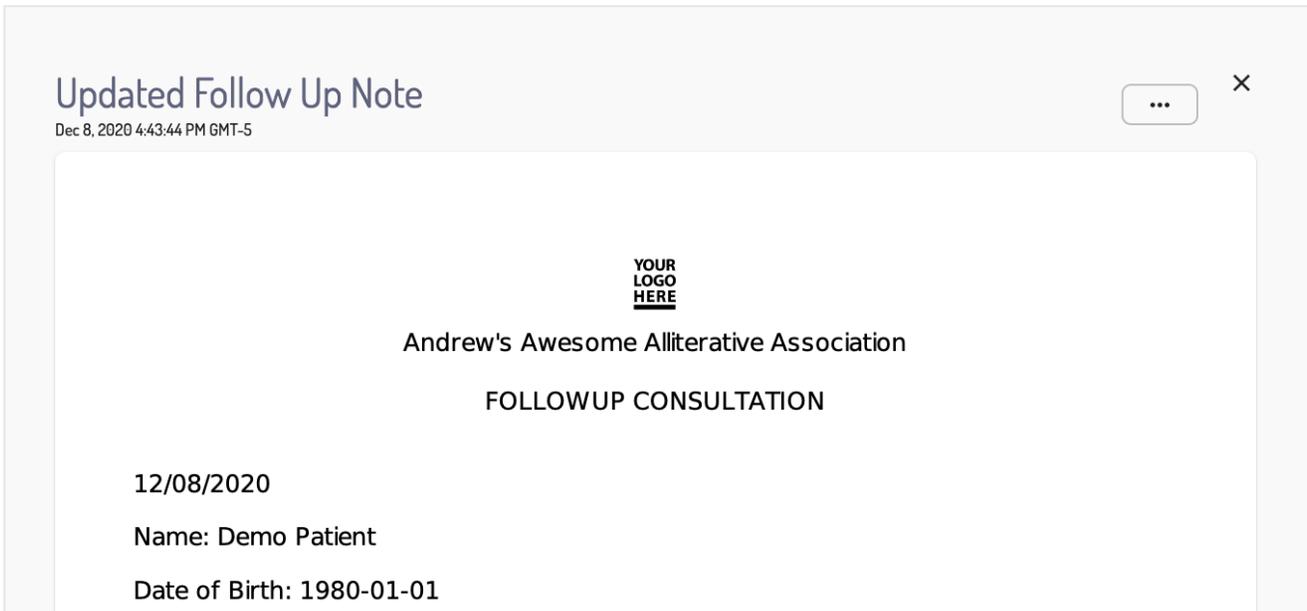
- ➔ Open the CancerIQ Cerner Integration App, find the desired patient, open the patient case, and select **View Documents** in the upper right-hand corner of the screen.
  - All documents generated and saved in the CancerIQ Specialist will appear on this list.
  - Note: You cannot edit documents directly in the Cerner Integration App.

**Iowa Test**

Date of Birth: 4/04/1997

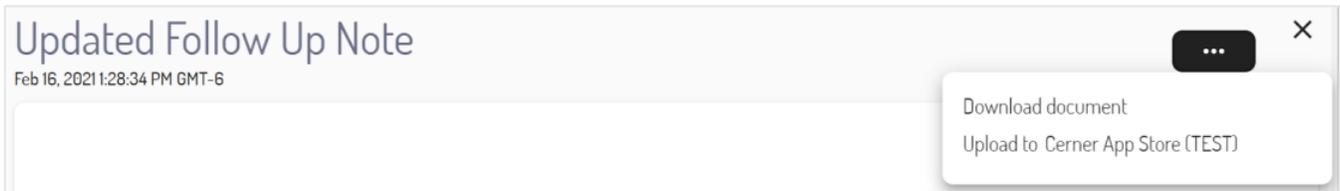
Patient Decision: Interested ▼

VIEW DOCUMENTS



**To Save Reports in Cerner Chart:**

- ➔ From the view menu, click the 3 dots in the upper right-hand corner
  - Select the option to upload to your EMR (options may look different than example below)



## Move Patient Case to Complete

A patient should be moved to the Complete dashboard when they are finished with the process. Patients can be moved to complete in two ways:

- A. Click the **Patient Case is Complete** button from the patient’s Generate Reports page
- B. You can also move patients to Complete from the Pending or Pre-Disclosure dashboard
  - To do so, find the patient on one of the dashboards and click on their row to highlight it
  - Click the **Patient Actions** button and select **Move to Complete**

