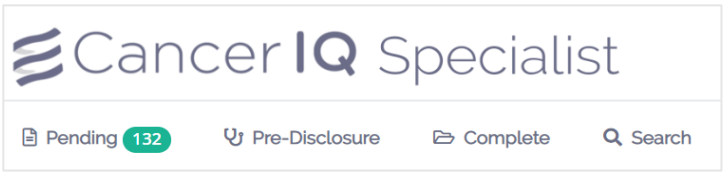
Table of Contents

Navigating the Specialist Dashboards

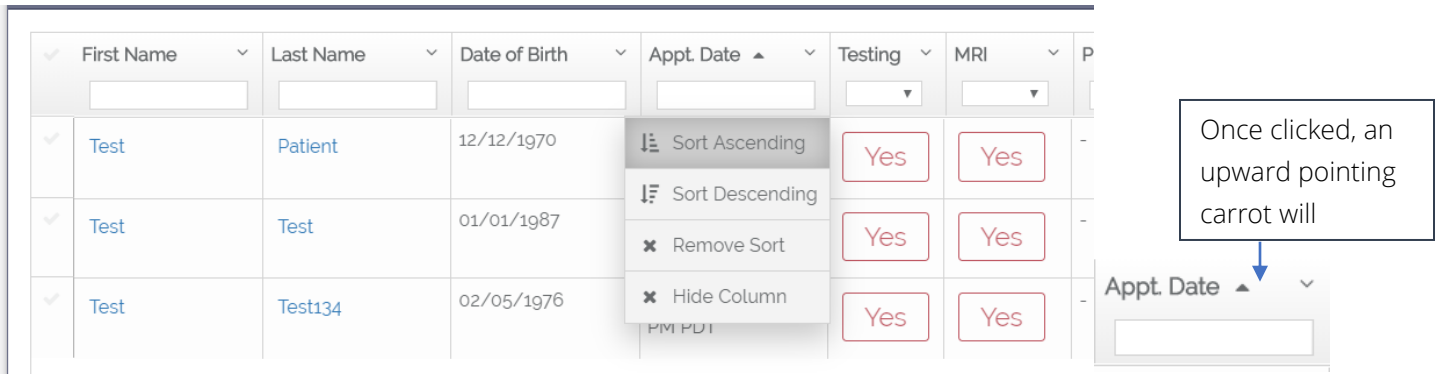
There are **3** different dashboards in CancerIQ Specialist - Pending, Pre-Disclosure, and Complete



- 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:

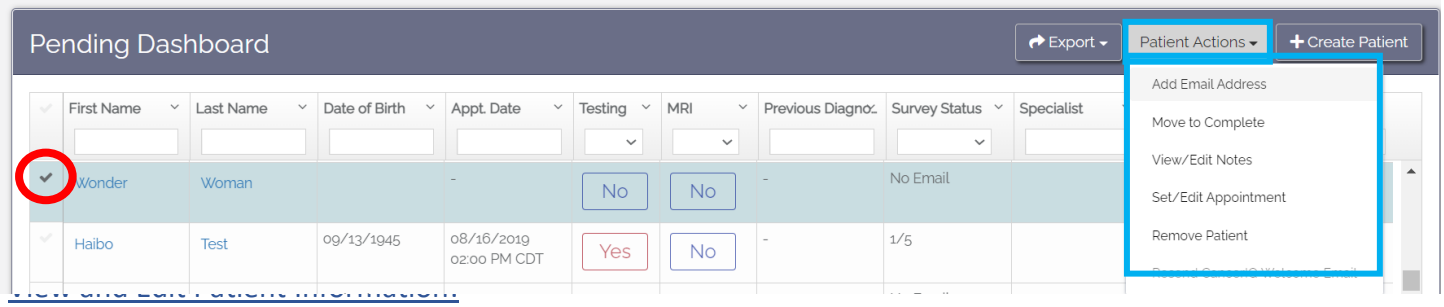
Patients are ordered chronologically based on when they are first moved to this stage. To see the dashboard by a certain column, click on the column and sort accordingly:



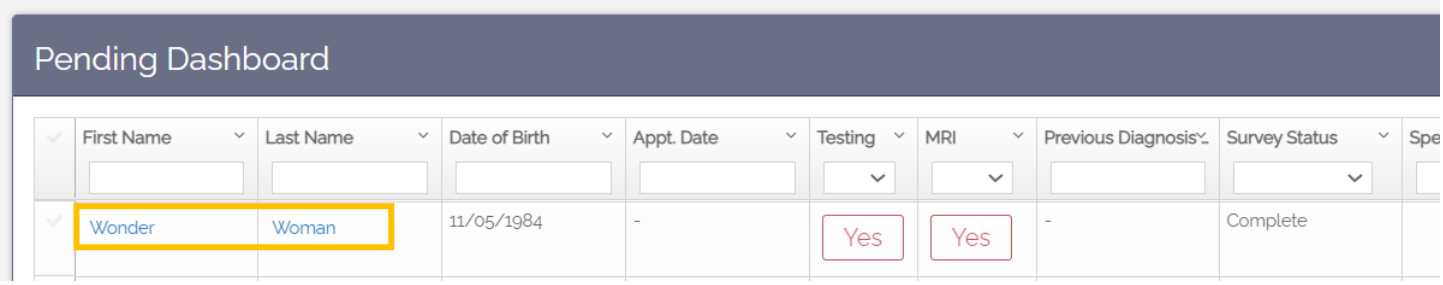
Patient Actions Button:

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

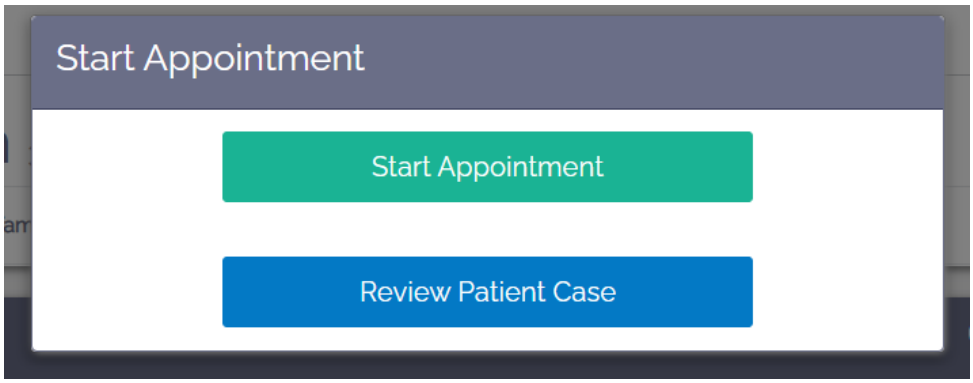


Find the patient on the Specialist dashboard and click on their name to open the Patient Details page.



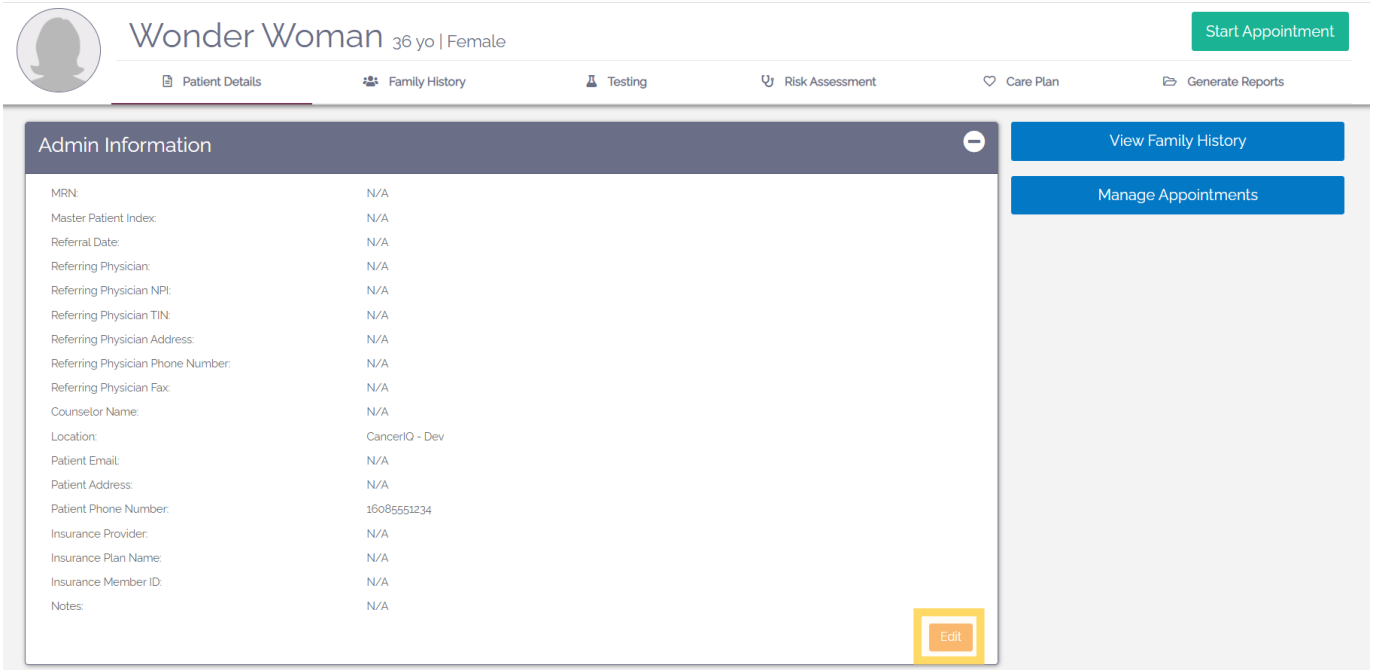
Choose “Start Appointment” or “Review Patient Case” in the pop-up box

- 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.

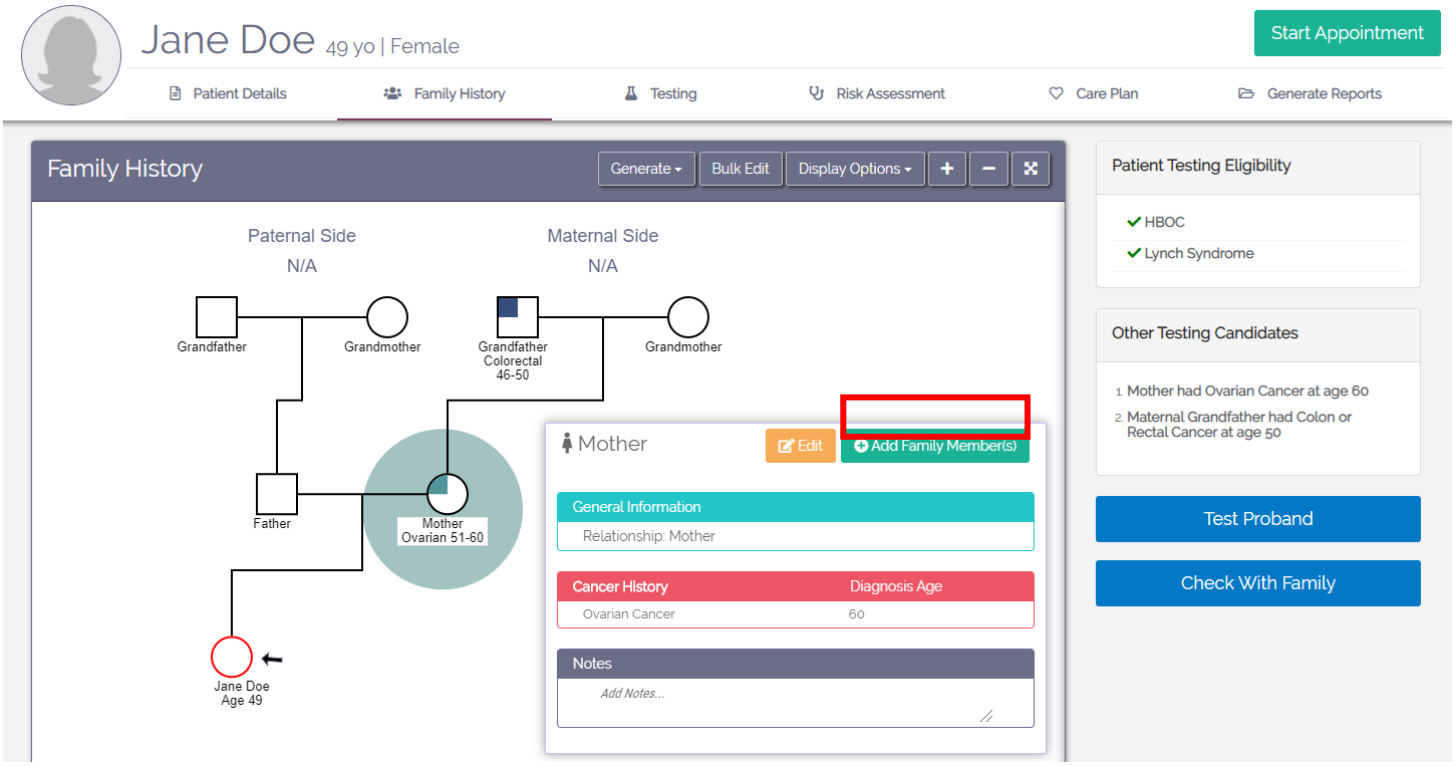
- To edit information on this page, click the orange **Edit** button and click **Save** once finished



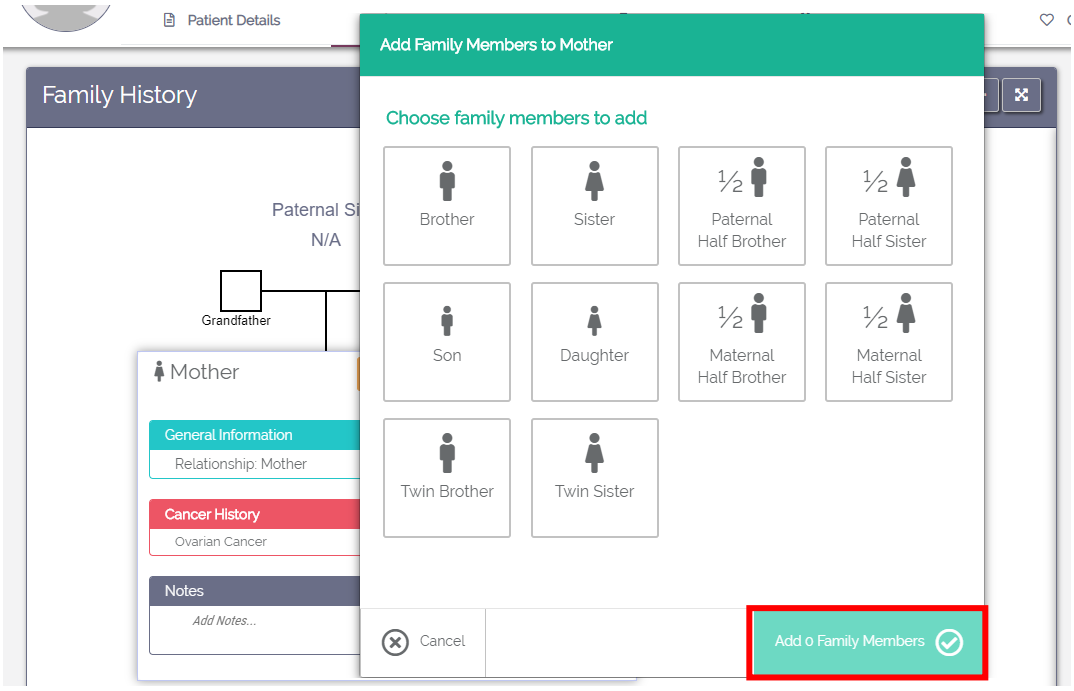
View and Edit Family History:

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

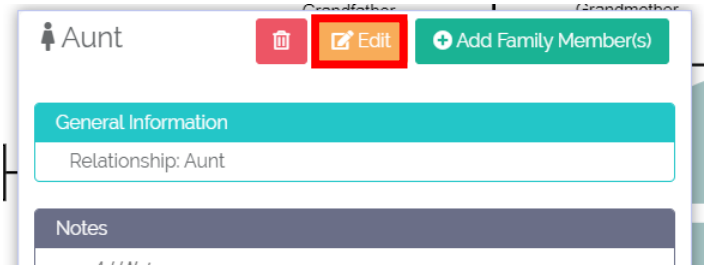
- **To add a family member**, select the relative on the pedigree and click **Add Family Member**



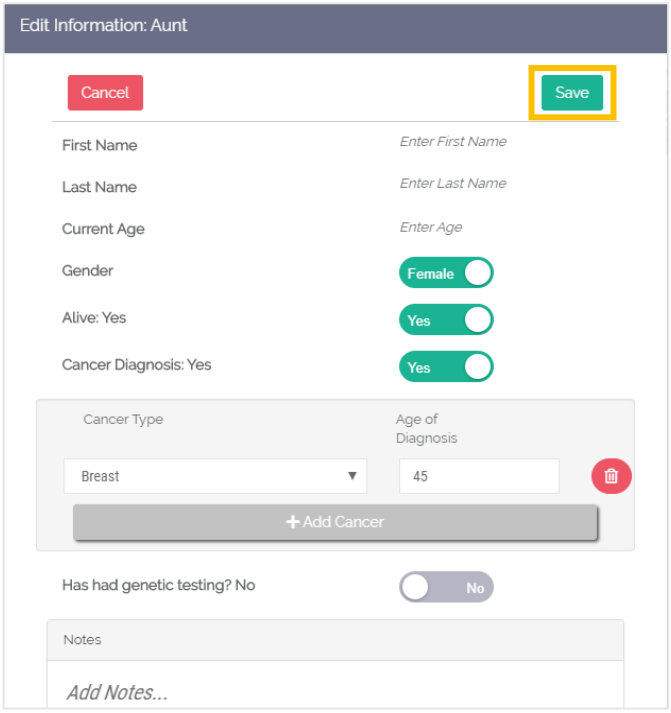
- Select the relative type(s) and number you want to add and click **Add Family Member**.



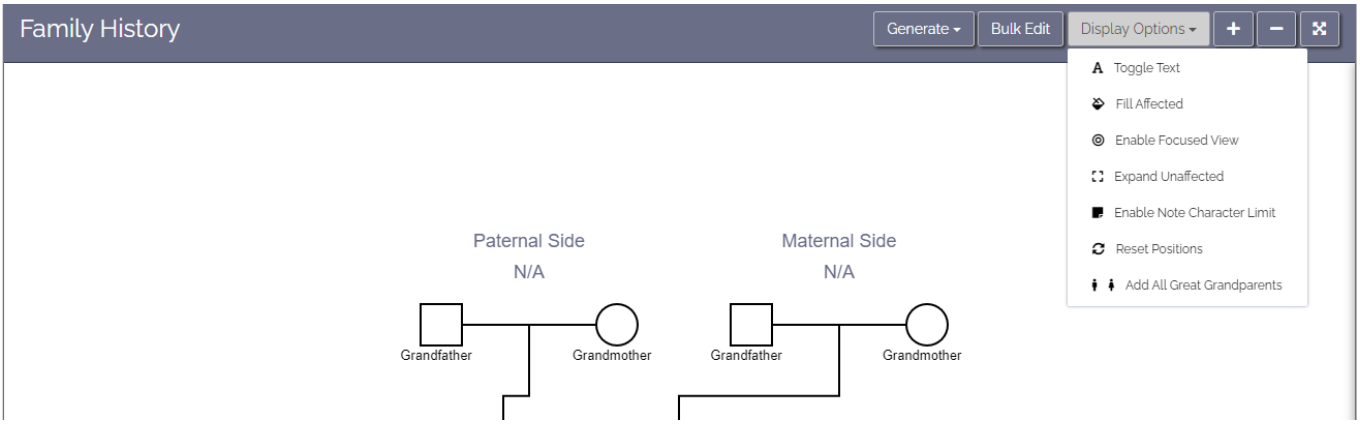
➔ **To edit or add a cancer diagnosis**, select the family member on the pedigree and click **Edit**



- 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:

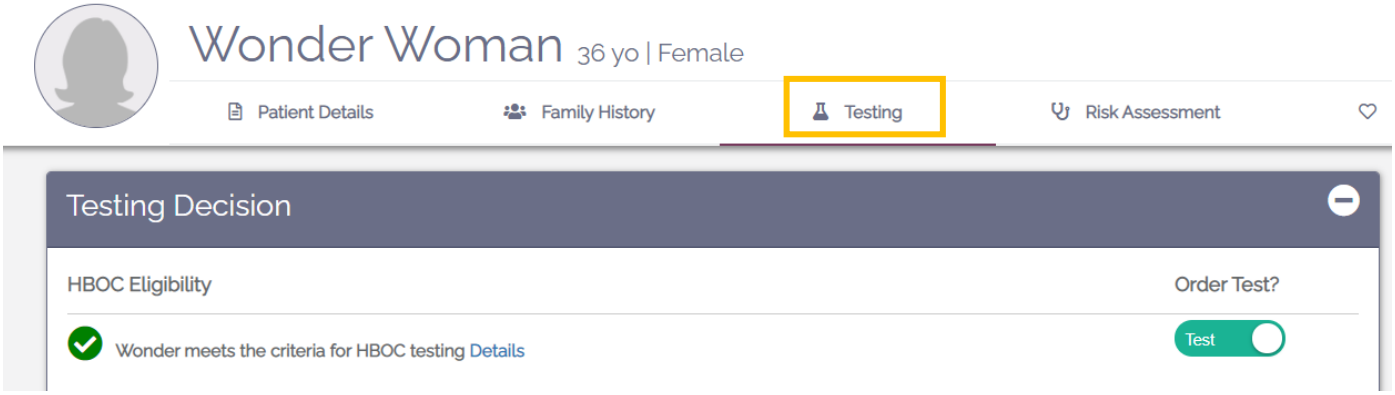


To save or print the pedigree, click "Generate" and select one of the options:

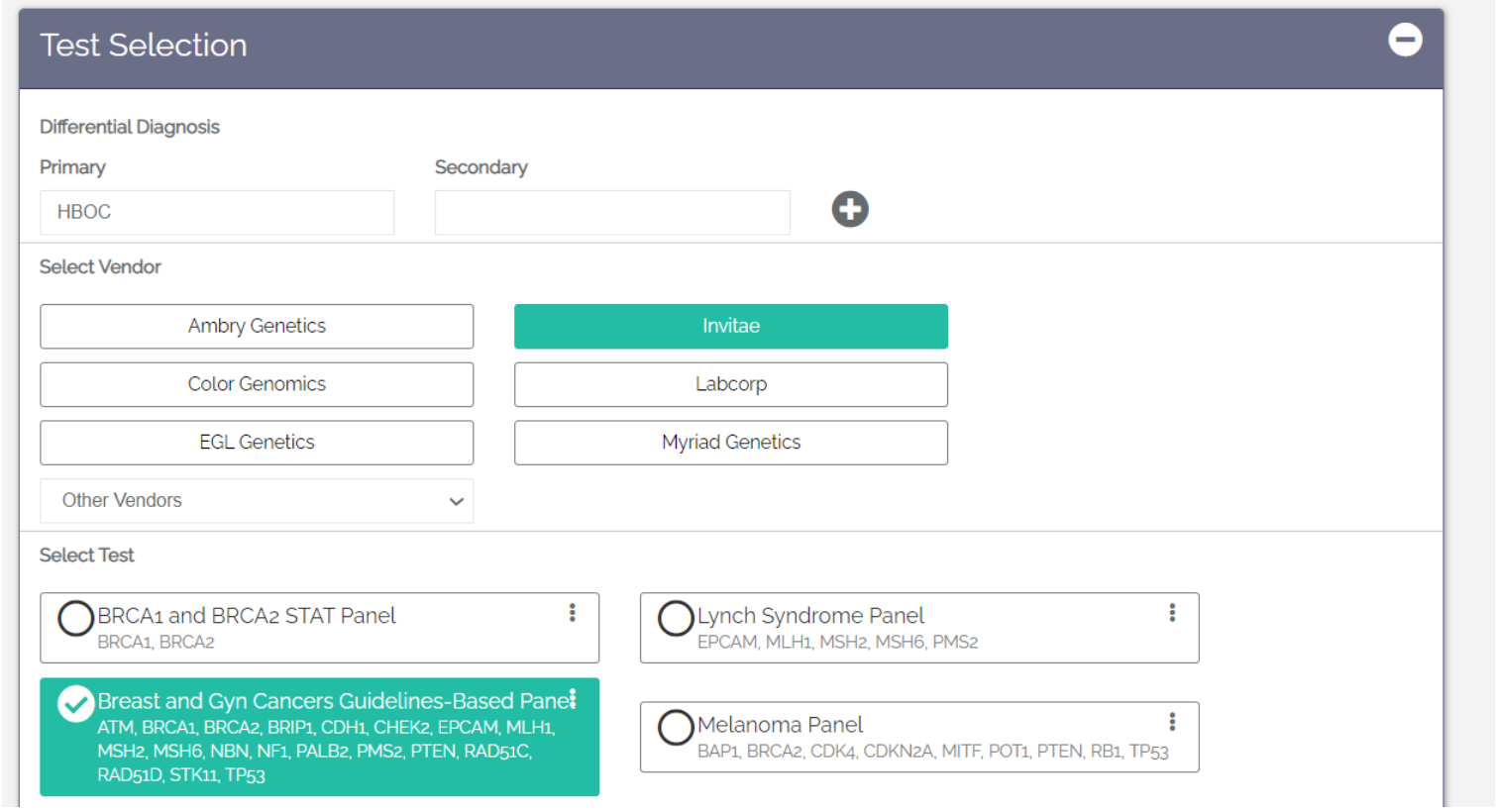
Order Genetic Testing:

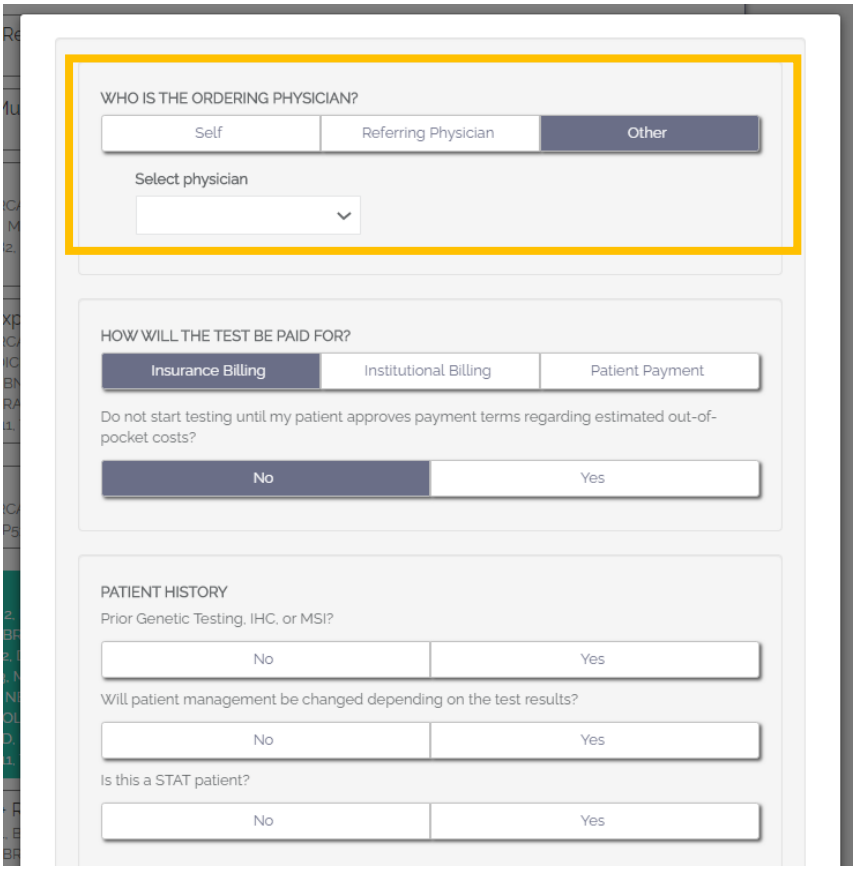
Step 1: To order genetic testing, click on the **Testing** tab

- 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.



- 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

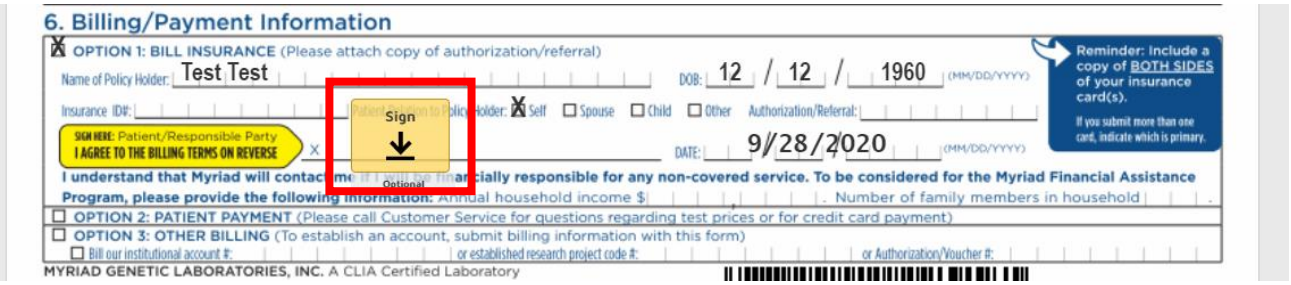




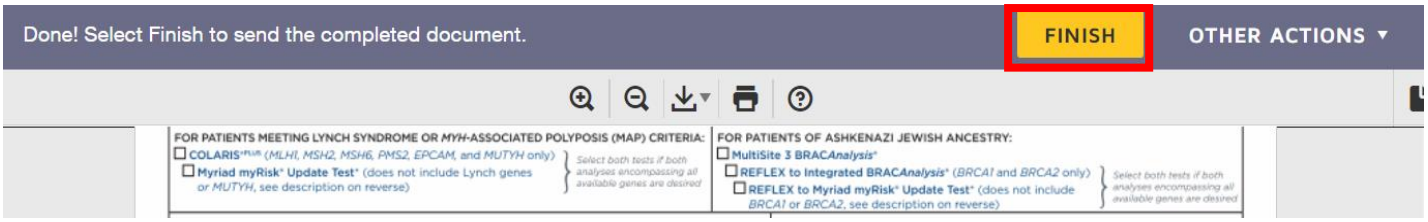
Step 3: If you ordered from **Myriad, Ambry, Invitae, or EGL**: TRF will auto-populate and open DocuSign

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

- 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

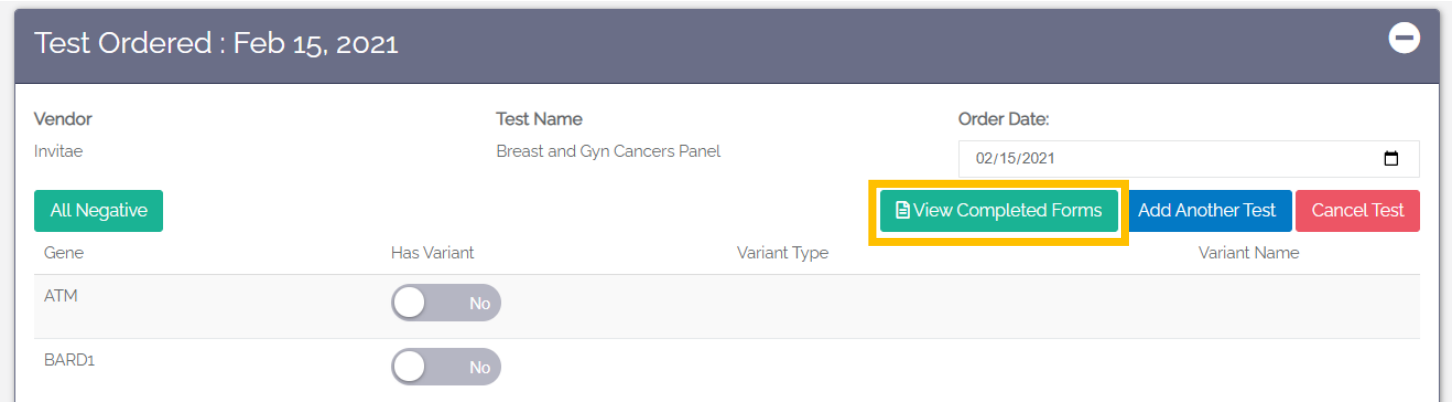


➔ If you do not want to sign electronically, click the yellow **Finish** button



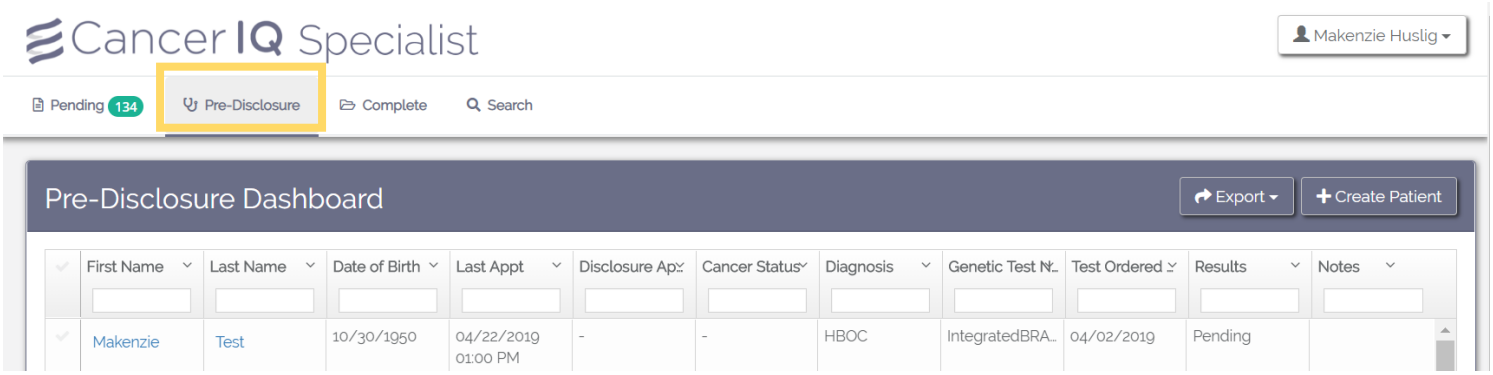
Depending on the lab selected, DocuSign may reload and give you the opportunity to have the provider now sign electronically. **Repeat the steps above according to your preference**.

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.

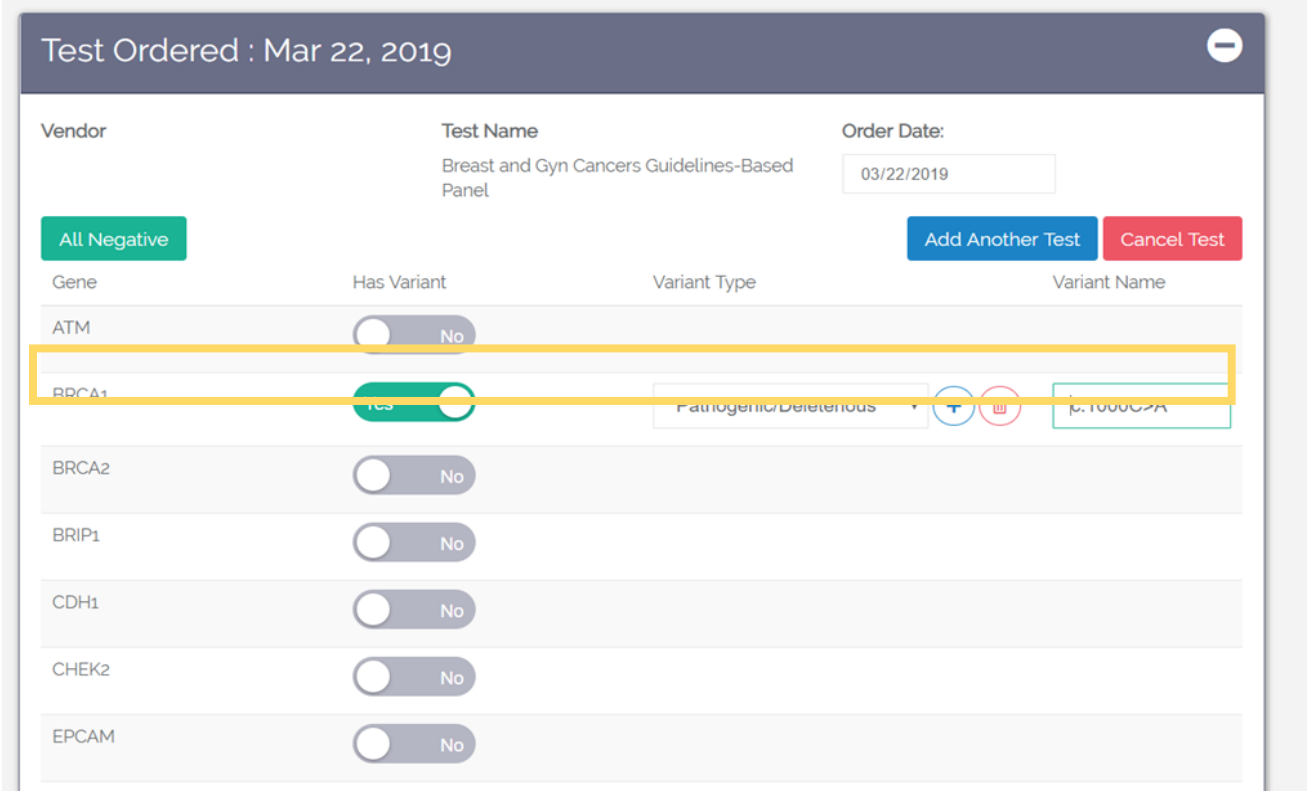


Entering Test Results

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

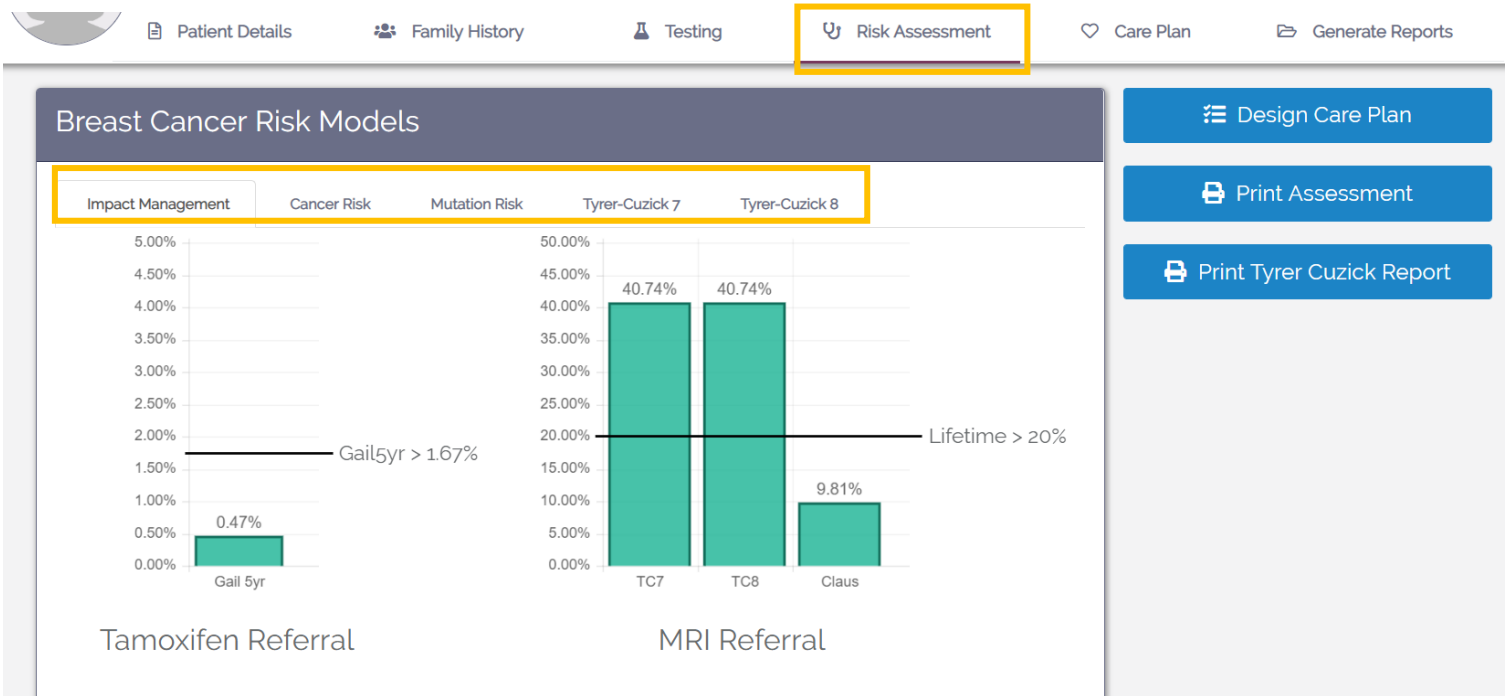


- Scroll to the **Test Ordered** box and enter the patient's genetic testing results.
  - Find the appropriate gene and slide Has Variant to YES
  - Select the variant type and enter the variant name
- Click **Save** at the bottom of the gene list.

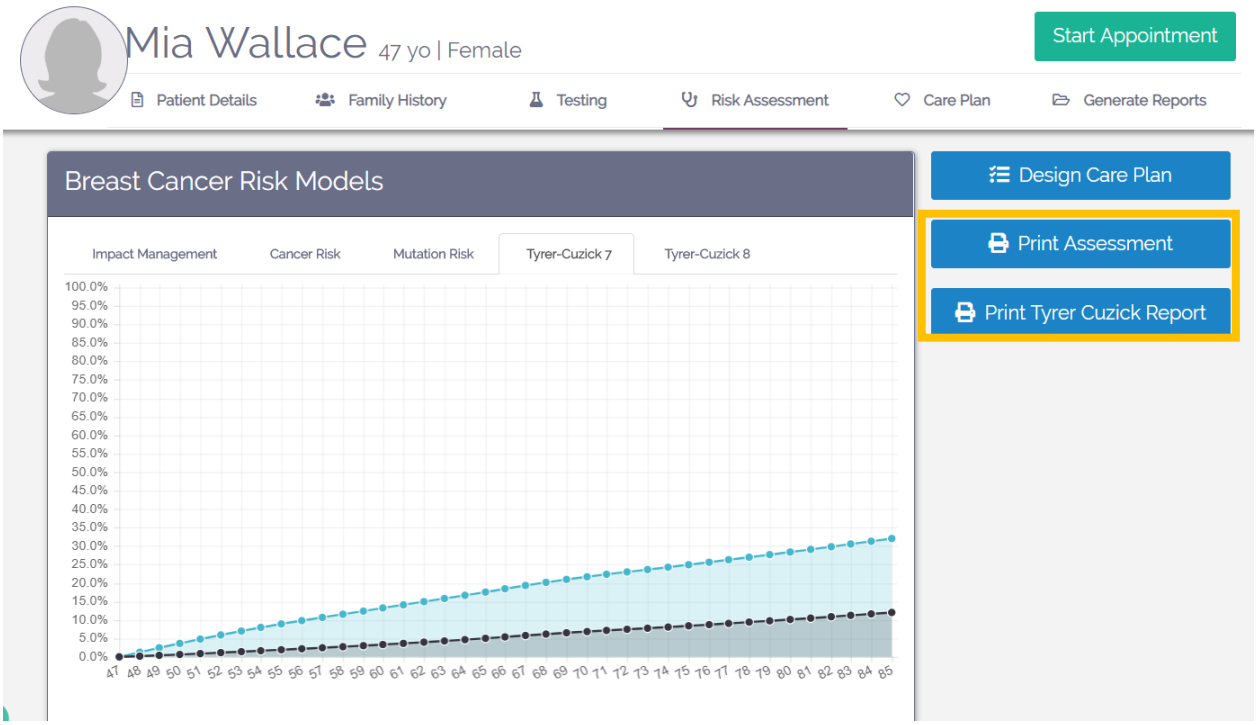


View Patient Risk Models & Assessment

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.



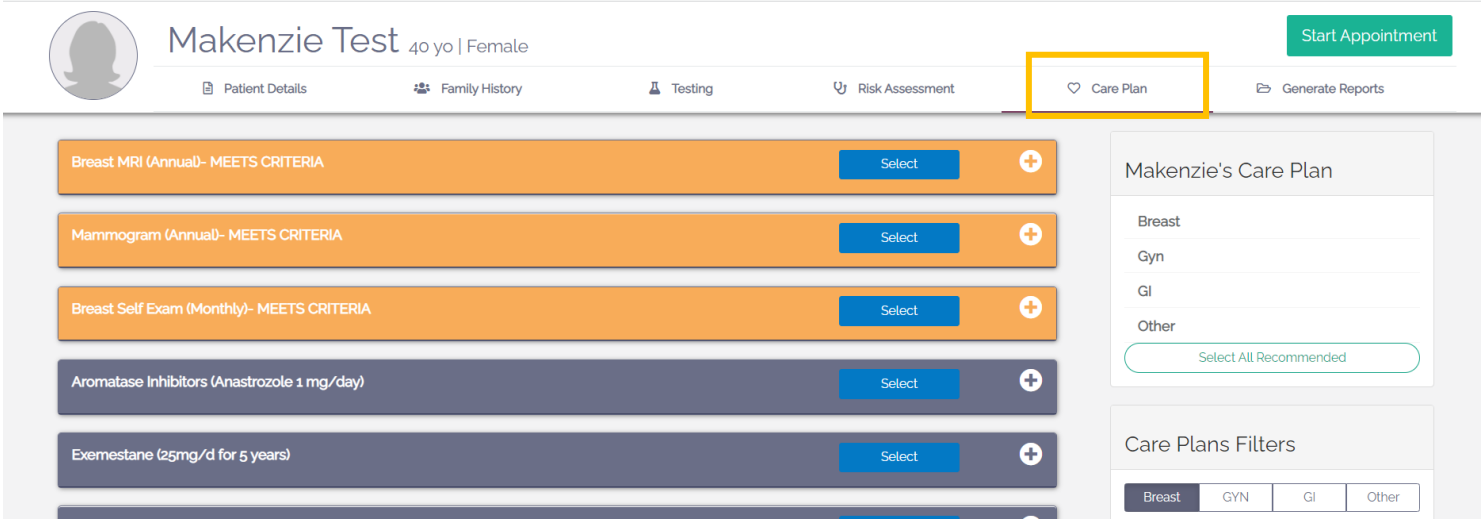
If you would like to download or print a patient's risk assessment, scroll to the top of the page and click the "Print Assessment" or "Print Tyrer-Cusick Report" button.



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.

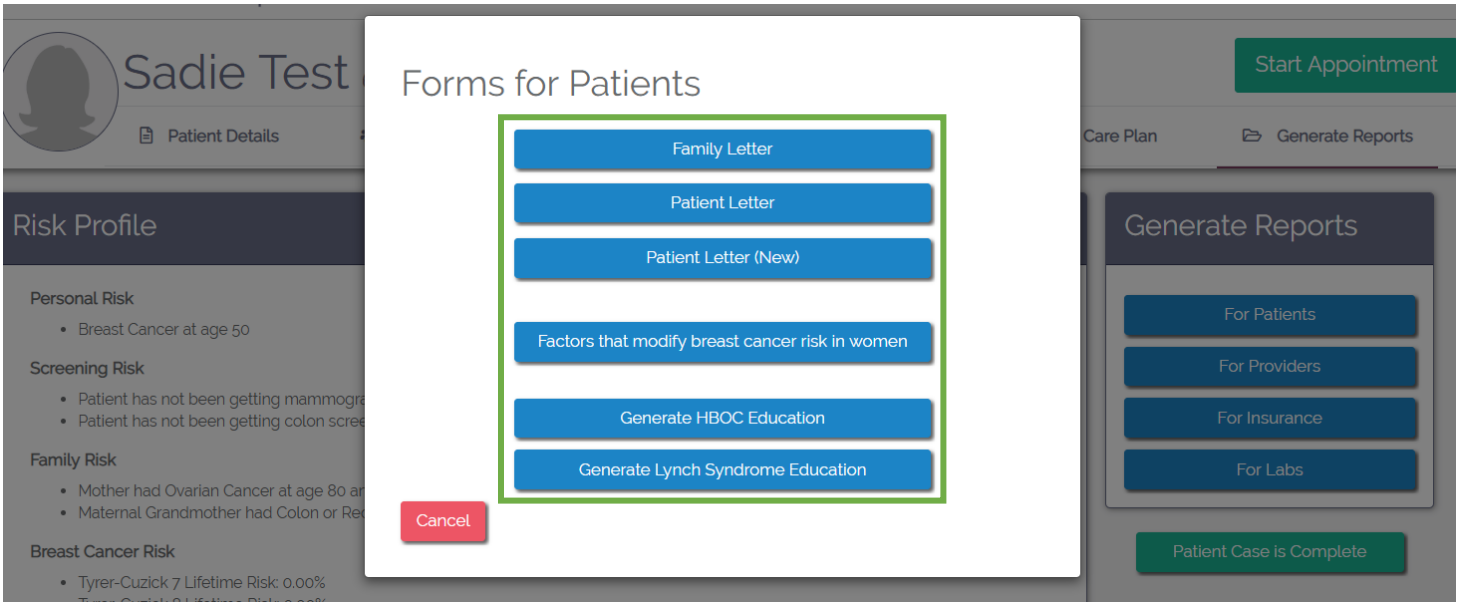
Assigning a care plan to a patient will automatically upload the patient into the CancerIQ Manager for future care plan tracking and automated reminders.

Generating Reports

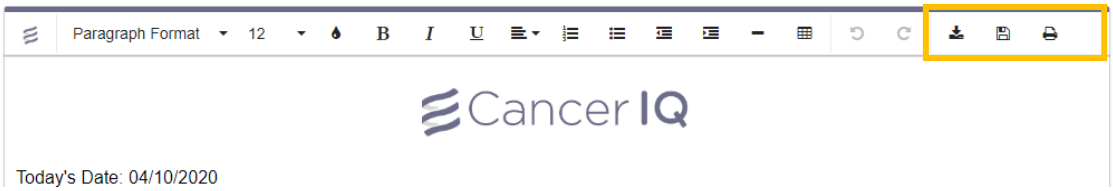
Click the Generate Reports tab to generate documentation, clinical notes, and the MRI referral letter

- 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.

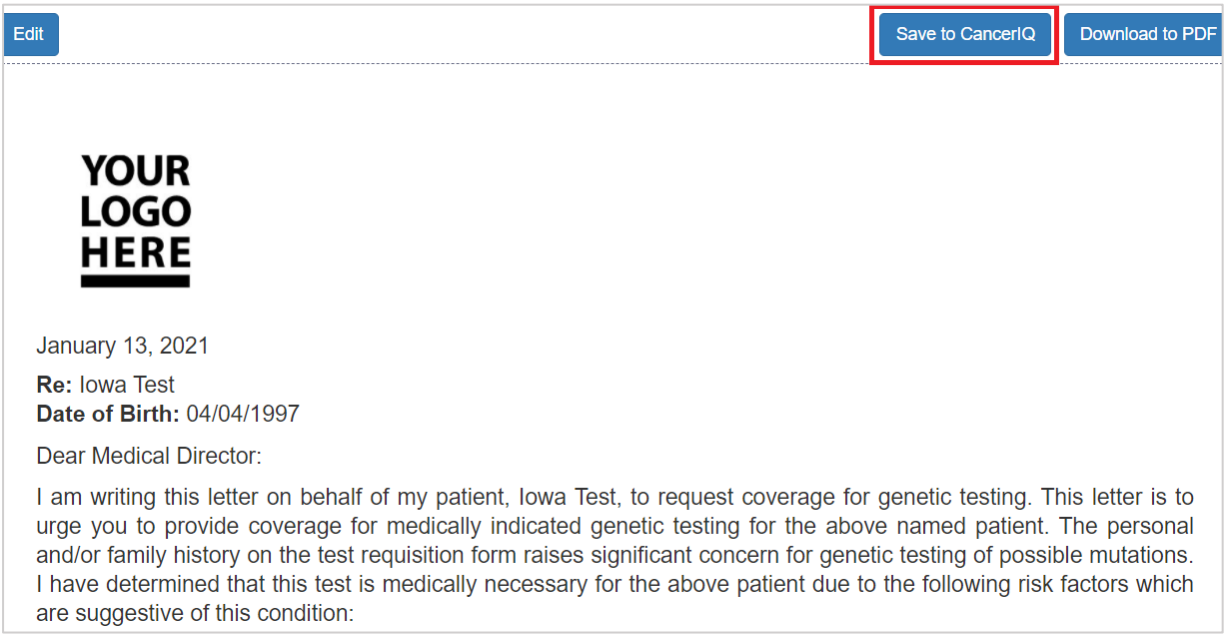


Send and View CancerIQ Letters/Reports in the Cerner Application

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.

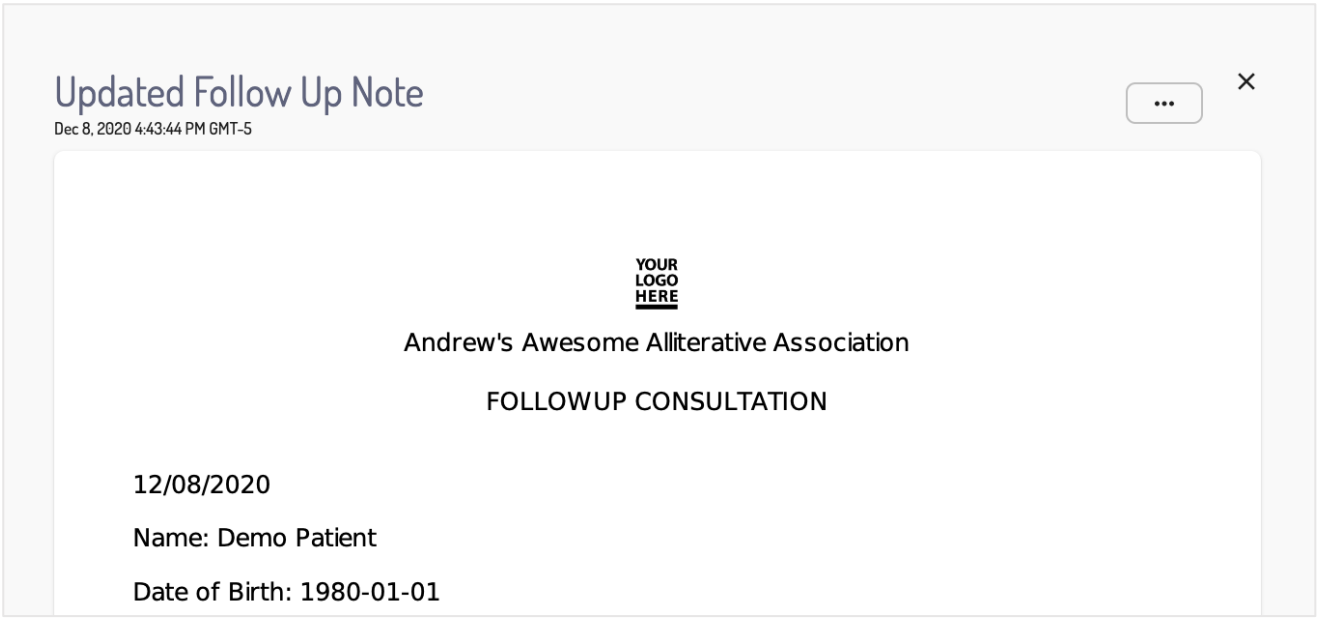
To Send Reports to the Cerner App:

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



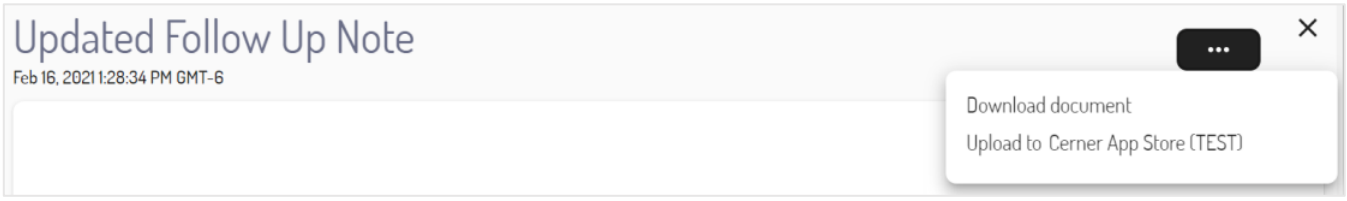
To View Reports to the Cerner App:

- 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.



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**