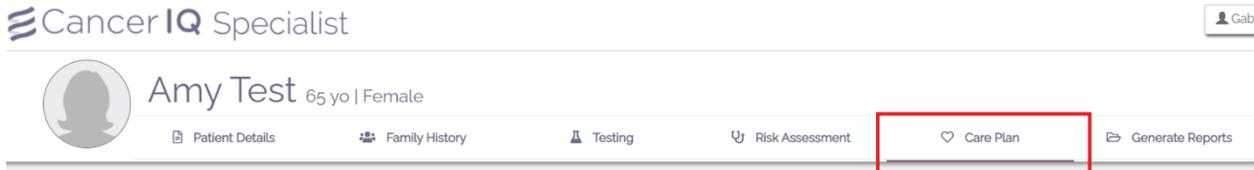


Assigning Care Plans

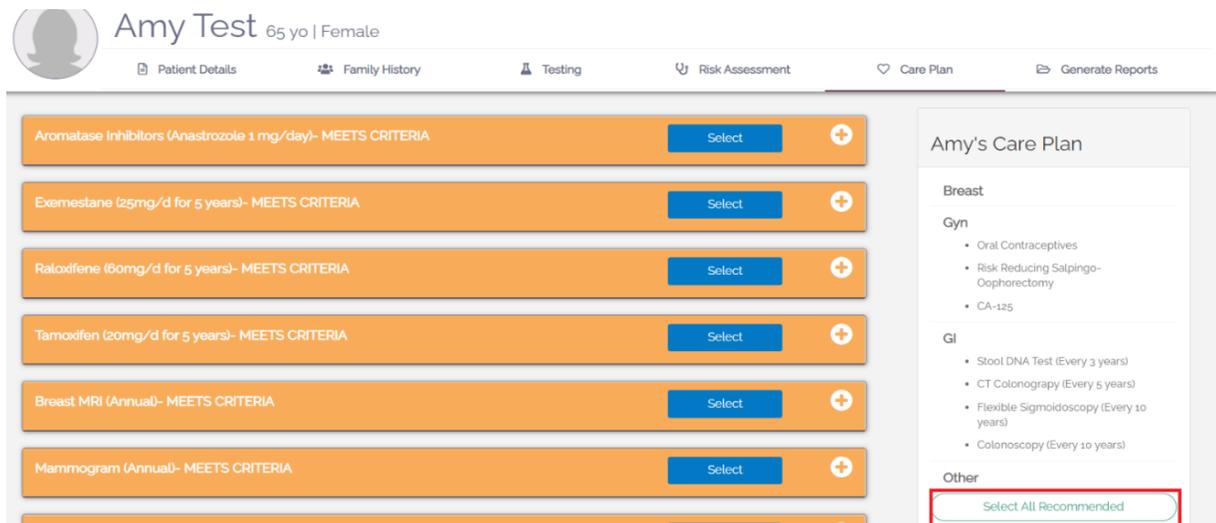
CancerIQ Specialist will automatically recommend patient care plans based on criteria met for each plan. Selecting a care plan for a patient will automatically add the patient to CancerIQ Manager for long-term management.

To add patient care plans, go to CancerIQ Specialist at specialist.canceriq.com and open the desired patient case by clicking on the blue text of the patient’s name. Next, click on the **Care Plans tab** at the top of the page.

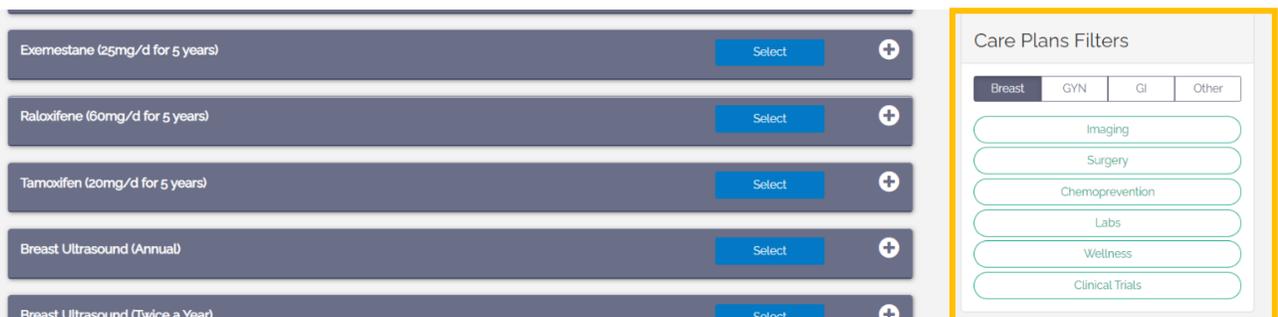


If the care plan is highlighted in orange, the patient is eligible under NCCN guidelines.

- ➔ **To assign the care plan**, click **Select**
- ➔ **To read more or to leave a note** with the recommended care plan, click the **plus sign** to expand the care plan. If you enter a note, be sure to click Save.
- ➔ **To select all eligible care plans**, click **Select All Recommended** on the right side of the page.



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



CancerIQ Manager:

CancerIQ Manager (manager.canceriq.com) gives you the ability to manage your patients recommended management plans over time. This portion of the platform will allow you to send patients email reminders about their management plan and collect real-time data on adherence.

How do patients show up in the Manager?

Any patient who is recommended a care plan using the CancerIQ Specialist Care Plan tab will show up in the CancerIQ Manager.

The Manager Dashboard:

The dashboard will display all of the patients that have been recommended care plans. The columns include:

- **Name:** Displays patients first and last name
- **Care Plans:** Displays recommended care plans and the number of care plans that were recommended
 - The first care plan displayed is either in alphabetical order or the managed plan with the most recent next date
 - The + # will let the provider know how many other care plans were recommended
- **Due:** Displays how many days away the patient is from the “Next date”

The screenshot shows the CancerIQ Manager interface. On the left is a table with columns for Name, Care Plans, and Due. The 'Due' column has an upward arrow icon. The first row is highlighted in pink and shows 'Wonder Woman' with 'Breast MRI (Annual) +23' and '11 days ago'. Other rows include Oscar Cisneros Jr, Stephanie Curry, Haibo TestPatient, Karen Hewlett, Oscar Enrich, Super Woman, Flora Jackson, Jean Grey, Haibo TestMedicare2, Insurance Test Patient, and Betty Williams.

On the right is a detailed view for 'Wonder Woman'. It includes a profile card with a 'W' icon, name, date of birth (12/12/1960), email (sadiesreedman95+wonderwoman@gmail.com), and cell phone (+1 (123) 123-1231). Below this is a 'Care Plans' section with a heart icon and a list of care plans: Breast MRI (Annual), Nutrition Counseling, Genetic Counseling, Double Contrast Barium Enema (Every 5 years), Colonoscopy (Once/ Twice a Year), and Polypectomy. Each care plan has a dropdown arrow and a notification icon.

All of these columns are filterable/searchable. You can search any column by hovering your mouse next to the column you want to search until you see a hamburger menu:

This screenshot is identical to the previous one, but a red rectangular box highlights the hamburger menu icon (three horizontal lines) located in the 'Due' column header of the patient list table.

Cancer IQ Manager		
Name	Care Plans	Due
Wonder Woman	Breast MRI (Annual) +23	Contains mammogram
Insurance Test Patient	Clinical Breast Exam (Twice a Year) +14	N/A

The patient profile that is selected from the dashboard will display on the right side of the screen. The following information will be displayed:

- Patient Name
- DOB
- Email
- Cell Phone
- Selected Care Plans
- Test History
- Risk Scores (Gail, Claus, Tyrer-Cuzick 7, Tyrer-Cuzick 8)

Editing Information:

This information is transferred from the Specialist. If you need to edit any of the information, click the three vertical dots in the upper right corner of the patient’s profile to open the patient in Specialist.

View In Specialist

Test Patient

<p>Gender: Female</p> <p>Date of Birth: 10/10/1990</p> <p>Email: N/A</p> <p>Cell Phone: N/A</p>	<p>Gail Five Year: N/A</p> <p>Claus Lifetime: N/A</p> <p>Tyrer-Cuzick 7 Lifetime: 11.50%</p> <p>Tyrer-Cuzick 8 Lifetime: 11.50%</p>
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Care Plans

Test History

Breast Self Exam (Monthly) ▼

Breast MRI (Annual) ▼

Risk Reducing Prophylactic Mastectomy ▼

Customize Your Management Preferences:

The CancerIQ Manager lets you customize your management settings based on each individual plan you've recommended for the patient. When you click on a patient to open their care plan, you will notice four toggles on the left-hand side.

Manage: This allows you to choose which management options you want to track for the patient.

- Switching the “Manage” toggle to ON will display the additional toggles below and allow you to type a “Next Date”

Next Date: This is the “due date” for the care plan you are managing. This date is **very important** because this is what all of the alerts and reminders cue off of.

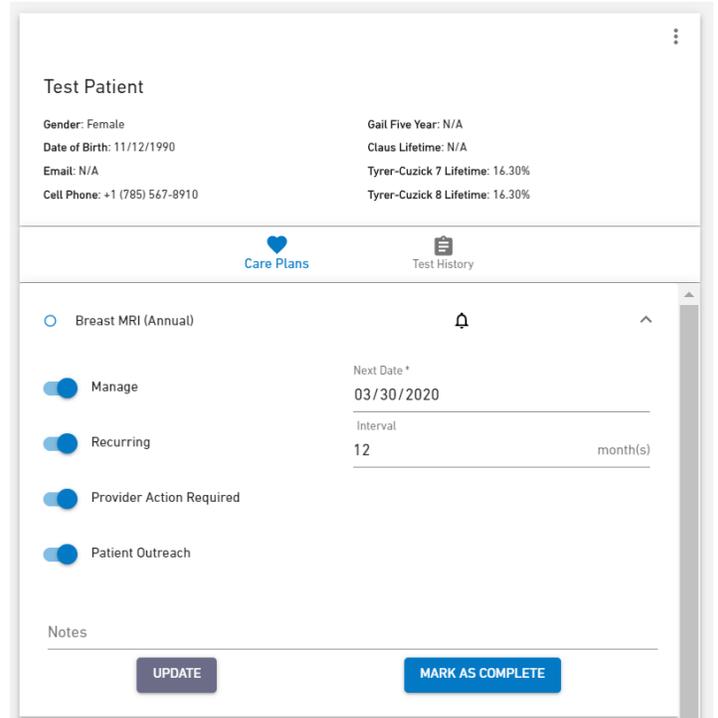
Recurring: If the patient has a recurring management plan, you can toggle this setting on to automatically update the new due date every time the patient completes their appointment.

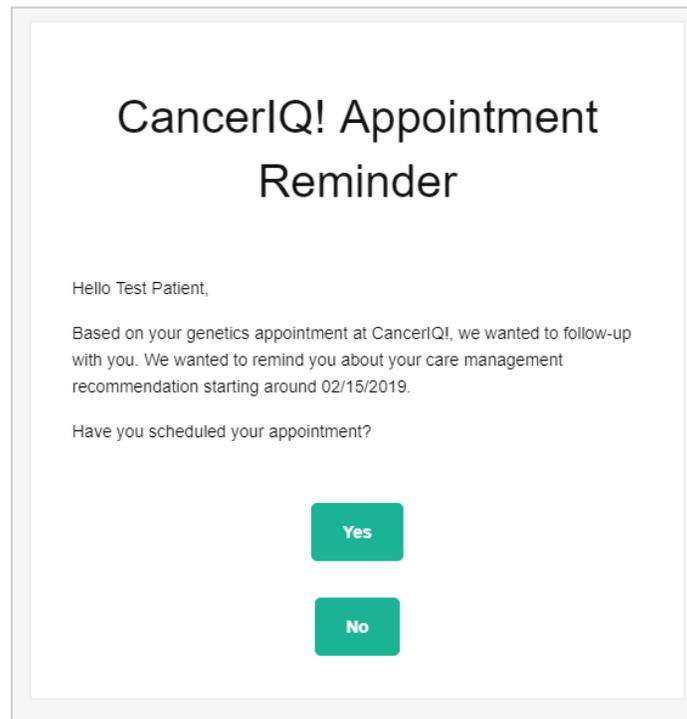
Provider Action Required: If you need to order a referral or complete pre-authorization for the patient, you can set an alert, so the task doesn't fall through the cracks.

- Once you switch the “Provider Action Required” toggle ON, the “Provider Task Complete” button will appear and a bell icon will display on the banner to the right of the care plan name. The bell icon indicates that “Provider Action Required” has been toggled ON.
- Switching this on will also highlight the patient in pink/red and bring them to the top of the dashboard when it is 30 days before the entered “Next Date”

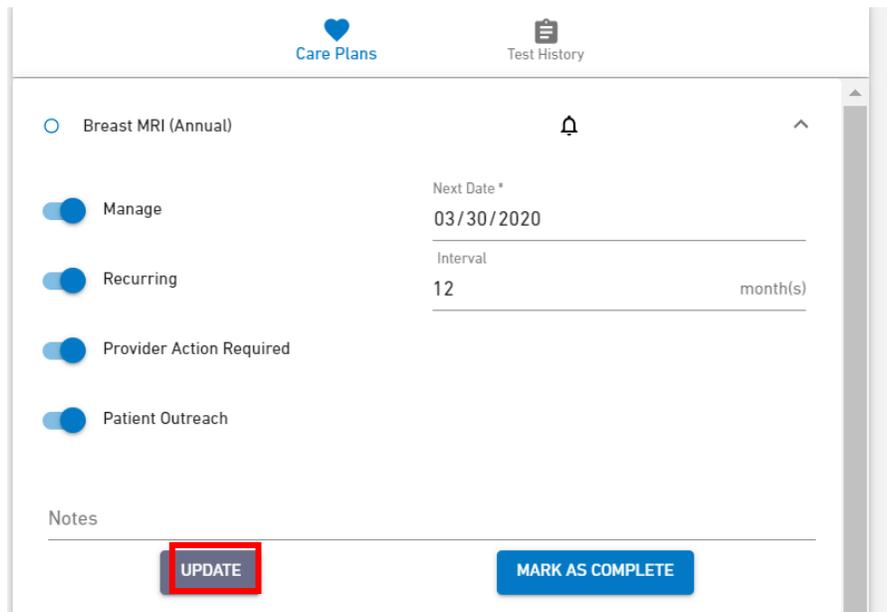
Patient Outreach: You have the option to schedule email reminders that will be sent to the patient 30 days before they are due for their appointment.

- Once you switch the “Patient Outreach” toggle ON, an envelope icon will appear on the banner to the right of the care plan name.
- Switching this on will also highlight the patient in pink/red, bring them to the top of the dashboard, *and* send an email to the patient when it is 30 days before the “Next Date”
- This email allows you to efficiently remind the patient about their appointment and manage their compliance. This way, you have a clear picture of which patients are on track and which ones need a little more help.



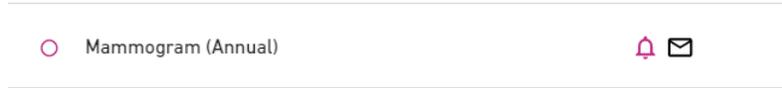


TIP: Anytime you adjust any of the toggles of dates, it is important to click the “Update” button at the bottom of each care plan panel. Clicking “Update” will save the updated information:



Set Alerts and Stay Updated on Your Patient's Progress:

You can easily stay up to date on the patient's progress using the alert system that appears in the banner of each management plan you're tracking.



Provider Action Alerts: Activated when the “Managed” toggle is turned ON, the “Provider Action Required” toggle is ON, and a “Next Date” is entered

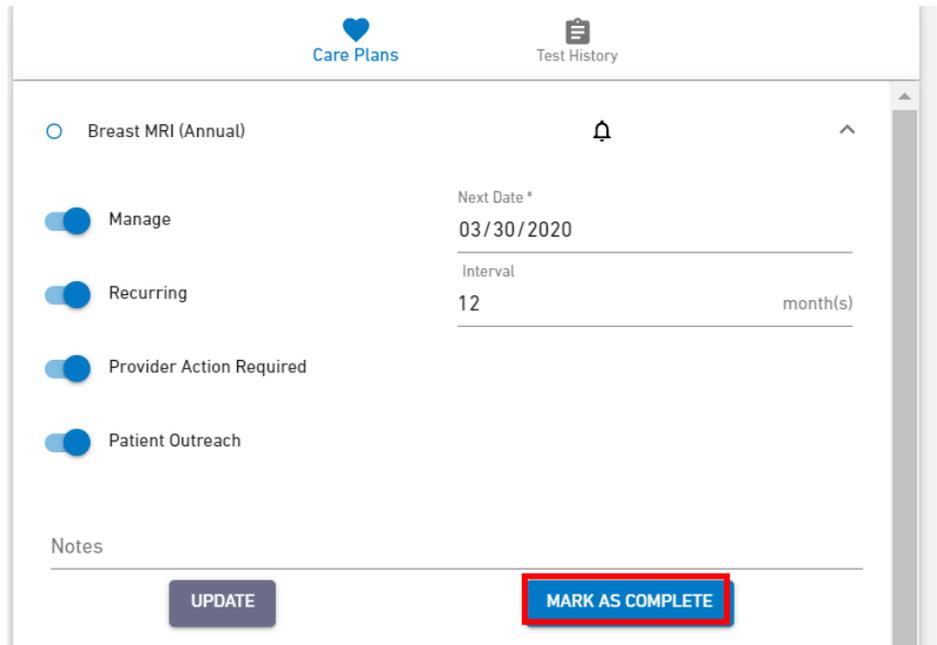
-  Black Bell: No action is required at the moment (not within 30 days of the “Next Date”)
-  Red/Pink Bell: Action IS required (within 30 days of the “Next Date”) – patient would be highlighted in red and moved to the top of the dashboard
-  Green Bell: “Provider Task Complete” button has been clicked

Patient Outreach Email Alerts: Activated when the “Managed” toggle is turned ON, the “Patient Outreach” toggle is ON, and a “Next Date” is entered

-  Black Envelope: Patient email has been scheduled (not within 30 days of the “Next Date”)
-  Red/Pink Paper Airplane: Email has been sent and has not been opened by the patient
 - Care plan is within 30 days of the “Next Date” – patient will be highlighted in red and moved to the top of the dashboard
-  Red/Pink Open Envelope: Email has been opened by the patient and:
 - Patient responded “No” they have not scheduled their appointment (within 30 days of the “Next Date”)
 - OR**
 - Patient has not responded (within 7 days of the “Next Date”) - patient will be highlighted in red and moved to the top of the dashboard
-  Green Open Envelope: Email has been opened by the patient and the patient opened the responded “Yes” they have scheduled their appointment

Mark as Complete:

To clear the alerts and “reset” the patient for the next interval of their care plan, click the “Mark As Complete” button on the bottom of the care plan panel:



Clicking **Mark as Complete** will:

- If it is a recurring care plan, update the “Next Date” by the recurring interval chosen
- Remove the highlight from the dashboard and remove the patient from the top of the list
- The “Due” dashboard column will update the amount of days away the care plan is