

CancerIQ Navigator Dashboard Functions & Management:

All patients will appear on the Navigator dashboard following completion of the short screening survey.

- The Navigator Dashboard appears in chronological order, so the last patient who completed the intake survey will appear at the top of the dashboard. If a patient who completed the survey is not seen, refresh the dashboard, and he or she will appear at the top of the page.

Cancer IQ Navigator Makenzie Huslig

Screened Patient Registry Filters Actions Search by name or DOB

| ✓ | First Name | Last Name | ID # | DoB | Testi | MRI | Survey Date | Intake | Cell Phone | Last Action | Appt Interest | Appointment | Log Contact |
|---|------------|-----------|------|------------|-------|-----|-------------|--------|-------------|-------------|---------------|-------------|-------------|
| ✓ | John | Walker | fc14 | 1950-01-01 | No | No | 05/10/2021 | Print | 12013450987 | New | ✓ ? X | | Log Contact |
| ✓ | SUZIE | SMITH | 4316 | 1965-01-01 | No | No | 05/10/2021 | Print | 18888888888 | New | ✓ ? X | | Log Contact |

Patient Search:

If your site screens numerous patients, it may be easiest to find patients by searching for them. This can be done in one of three ways.

- 1) Use the searchable Navigator columns to search for a patient using known information.
 - For example, if you know the patient’s last name, you can type their last name at the top of the **Last Name** column, and all patients who were screened with that last name will appear.

Screened Patient Registry Filters Actions Search by name or DOB

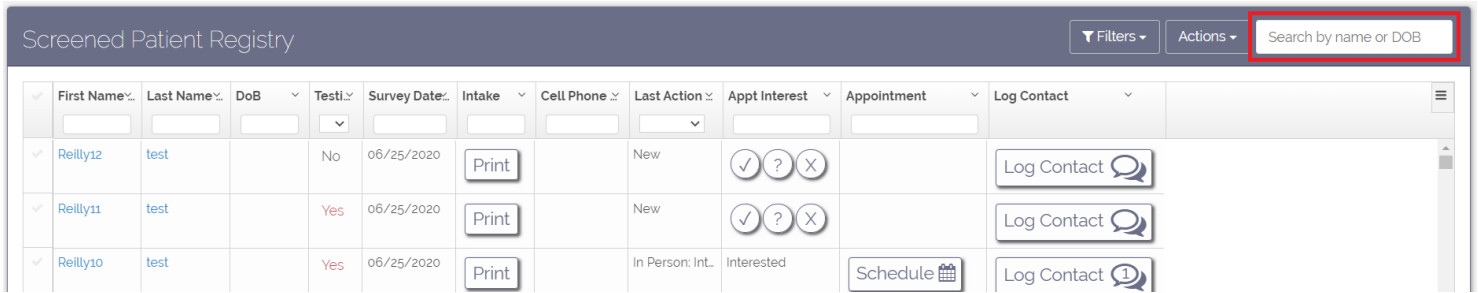
| ✓ | First Name | Last Name | DoB | Testi | Survey Date | Intake | Cell Phone | Last Action | Appt Interest | Appointment | Log Contact |
|---|------------|-----------|-----|-------|-------------|--------|------------|-----------------|---------------|-------------|-------------|
| ✓ | Reilly12 | test | | No | 06/25/2020 | Print | | New | ✓ ? X | | Log Contact |
| ✓ | Reilly11 | test | | Yes | 06/25/2020 | Print | | New | ✓ ? X | | Log Contact |
| ✓ | Reilly10 | test | | Yes | 06/25/2020 | Print | | In Person: Int. | Interested | Schedule | Log Contact |

- 2) Use the filterable Navigator columns to filter a patient using known information.
 - For example, if you know the patient is a new patient, use the dropdown menu at the top of the **Last Action** column and select **New** to view all new patients.

Screened Patient Registry Filters Actions Search by name or DOB

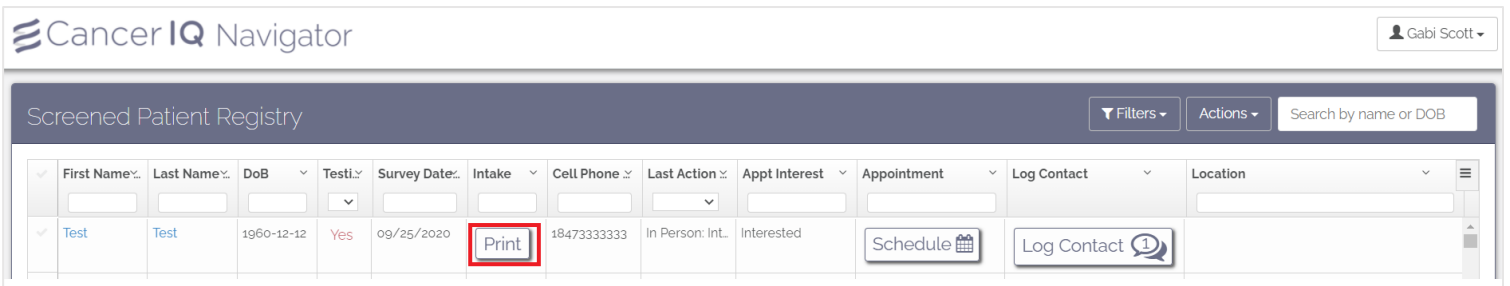
| ✓ | First Name | Last Name | DoB | Testi | Survey Date | Intake | Cell Phone | Last Action | Appt Interest | Appointment | Log Contact |
|---|------------|-----------|-----|-------|-------------|--------|------------|-----------------|---------------|-------------|-------------|
| ✓ | Reilly12 | test | | No | 06/25/2020 | Print | | New | ✓ ? X | | Log Contact |
| ✓ | Reilly11 | test | | Yes | 06/25/2020 | Print | | New | ✓ ? X | | Log Contact |
| ✓ | Reilly10 | test | | Yes | 06/25/2020 | Print | | In Person: Int. | Interested | Schedule | Log Contact |

3) Use the search bar in the upper right-hand corner of the screen to search for a patient using their name or DOB.



Print Intake Form:

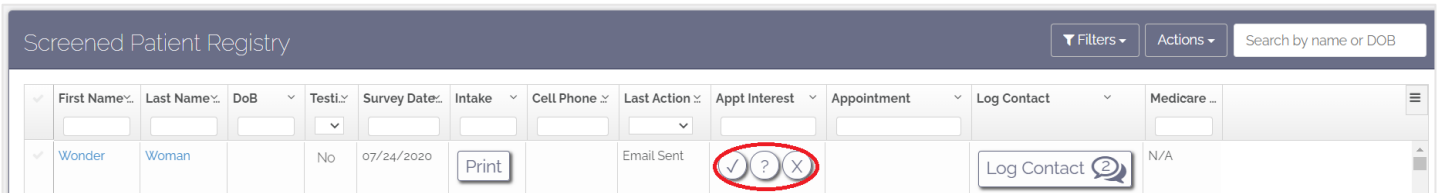
- Find the patient on the dashboard and click the **Print** button in the **Intake** column



Mark Patient Interest:

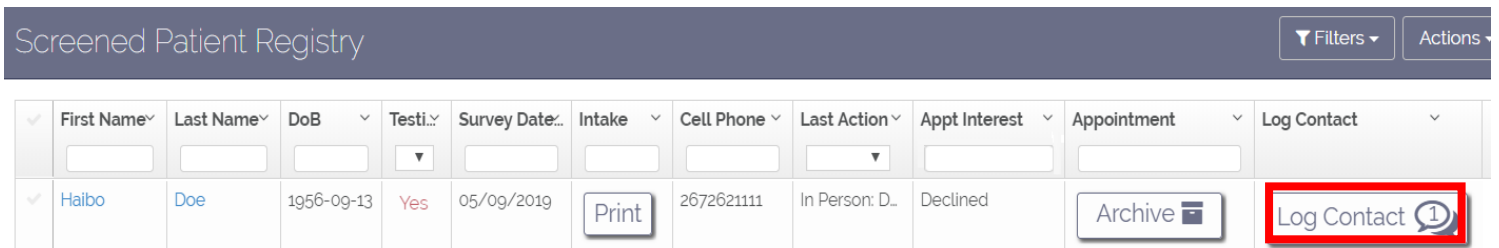
If a patient is identified as high-risk, you will need to indicate their decision in moving forward with genetics.

- Find the patient on the dashboard and mark the appropriate decision in the **Appt. Interest** column
 - The **checkmark** means the patient is **interested** in genetic testing
 - The **question mark** means the patient **needs more time** to consider genetic testing,
 - The **X** means that the patient **declines** genetic testing.



Change Patient Interest:

- Find the patient on the dashboard and click the **Log Contact** button



- In the Contact History box, select **Other**. Choose **Met in Person** in the first drop-down menu. Choose **Patient Declined Appt.** or **Patient is Interested** in the second drop-down menu. Click **Add** when finished.

Contact history for Haibo Doe

How did you contact the patient Haibo Doe?

Call Mail **Other**

Met In Person

Anything you'd like to remember?

Cancel Add

Patient is Interested

Please select reason

Patient is Interested

Patient is Uncertain

Patient Declined Appt.

View/Edit Patient Information in Navigator:

Once a patient is located in the Navigator, you can view the patient’s information that was entered during their screening survey. **To open a patient’s case and view their information**, click on their first or last name displayed in blue text.

Screened Patient Registry

Filters Actions Search by name or DOB

| First Name | Last Name | DoB | Testi | Survey Date | Intake | Cell Phone | Last Action | Appt Interest | Appointment | Log Contact | Medicare |
|------------|-----------|-----|-------|-------------|--------|------------|-------------|---------------|-------------|---------------|----------|
| Wonder | Woman | | No | 07/24/2020 | Print | | Email Sent | ✓ ? X | | Log Contact 2 | N/A |

- This will open the patient’s Screening Results page. **To edit information**, click the pencil button.

Dashboard Screening Results Contact History

Reilly11 test

MRN: N/A

Date of Birth:

Age: N/A

Gender: Female

Adopted: N/A

Race: N/A

Ethnicity: N/A

Ashkenazi: N/A

Intake Results for Reilly11 test

Genetics Referral

N/A

Genetic Testing

Yes

Details

MRI Eligibility

No

Patient Information for Reilly11 test

Personal Cancers

| | | |
|-----------------|-------------------|----|
| Colon or Rectal | Age of Diagnosis: | 45 |
|-----------------|-------------------|----|

- Once all changes have been made, click **Save Changes** in the lower, right-hand corner of the **Edit Patient** box.

The screenshot shows the 'Edit Patient' interface. It is divided into four main sections:

- Personal Cancers:** Contains two entries. The first entry has 'Cancer' set to 'Colon or Rectal' and 'Age of Diagnosis' set to '45'. The second entry has 'Cancer' set to 'Ovarian' and 'Age of Diagnosis' set to '45'. There are red trash icons next to each entry and a blue plus icon to add more.
- Family Cancers:** Contains a single green button labeled 'Add Family Member'.
- Genetic Testing:** Contains three dropdown menus: 'Has Had Genetic Testing' (set to 'No'), 'Family BRCA Testing' (set to 'No'), and 'Family Lynch Testing' (empty).
- Admin Information:** Contains a red 'Cancel' button on the left and a green 'Save Changes' button on the right, which is highlighted with a red rectangular box.

Archive Patients:

Patients who are archived will be removed and unviewable from the dashboard, but their information will still be preserved. A patient who is archived can be viewed or unarchived at any time.

To archive one patient:

- Click anywhere in a patient’s row that displays white area. **(Note: When a patient is selected, the row will highlight in gray and a checkmark will display to the left of the patient’s first name.)**
- Once the patient’s row is highlighted, an Archive button will appear between the Actions drop-down menu and the search bar in the upper right-hand corner of the screen. Click the **Archive** button.

The screenshot shows the 'Screened Patient Registry' interface. At the top right, there are 'Filters', 'Actions', and 'Archive' buttons. The 'Archive' button is highlighted with a red box. Below the buttons is a search bar labeled 'Search by name or DOB'. The table below has columns for 'First Name', 'Last Name', 'DoB', 'Testi.', 'Survey Date', 'Intake', 'Cell Phone', 'Last Action', 'Appt Interest', 'Appointment', and 'Log Contact'. The first row is highlighted in gray and has a checkmark in the first column. The first name is 'Reilly12' and the last name is 'test'. There are also 'Print', 'Log Contact', and status icons (checkmark, question mark, X) visible.

To archive multiple patients:

1. Filter patients that you wish to archive. For example, if you want to archive all average risk patients, select “No” from the dropdown menu in the Testing column to view all average risk patients.

Screened Patient Registry

Filters Actions Search by name or DOB

| First Name | Last Name | DoB | Testi.. | Survey Date | Intake | Cell Phone | Last Action | Appt Interest | Appointment | Log Contact |
|------------|-----------|-----|---------|-------------|--------|------------|-------------|---------------|-------------|-------------|
| Reilly12 | test | | No | 06/25/2020 | Print | | New | ✓ ? X | | Log Contact |

2. Select the checkmark at the top of the checkmark column to select all average risk patients.

Screened Patient Registry

Filters Actions Search by name or DOB

| First Name | Last Name | DoB | Testi.. | Survey Date | Intake | Cell Phone | Last Action | Appt Interest | Appointment | Log Contact |
|------------|-----------|------------|---------|-------------|--------|------------|-------------|---------------|-------------|-------------|
| Reilly12 | test | | No | 06/25/2020 | Print | | New | ✓ ? X | | Log Contact |
| Reilly5 | test | 1960-10-25 | No | 06/25/2020 | Print | | New | ✓ ? X | | Log Contact |

3. Once the patients’ rows are highlighted, an Archive button will appear between the Actions button and the search bar in the upper right-hand corner of the screen. Click the **Archive** button.

Screened Patient Registry

Filters Actions Archive Search by name or DOB

| First Name | Last Name | DoB | Testi.. | Survey Date | Intake | Cell Phone | Last Action | Appt Interest | Appointment | Log Contact |
|------------|-----------|------------|---------|-------------|--------|------------|-------------|---------------|-------------|-------------|
| Reilly12 | test | | No | 06/25/2020 | Print | | New | ✓ ? X | | Log Contact |
| Reilly5 | test | 1960-10-25 | No | 06/25/2020 | Print | | New | ✓ ? X | | Log Contact |

Find Archived Patients:

1. Click the Filters drop-down menu in the upper right-hand corner of the screen.

Screened Patient Registry

Filters Actions Search by name or DOB

| First Name | Last Name | DoB | Testi.. | Survey Date | Intake | Cell Phone | Last Action | Appt Interest | Appointment | Log Contact |
|------------|-----------|-----|---------|-------------|--------|------------|-------------|---------------|-------------|-------------|
| Reilly12 | test | | No | 06/25/2020 | Print | | New | ✓ ? X | | Log Contact |

2. Select Archived Patient to see all patients that have been archived.

Screened Patient Registry

Filters Actions Search by name or DOB

| First Name | Last Name | DoB | Testi.. | Survey Date | Intake | Cell Phone | Last Action | Appt Interest | Appointment | Log Contact |
|------------|-----------|-----|---------|-------------|--------|------------|-------------|---------------|-------------|-------------|
| Reilly12 | test | | No | 06/25/2020 | Print | | New | ✓ ? X | | Log Contact |
| Reilly11 | test | | Yes | 06/25/2020 | Print | | New | ✓ ? X | | Log Contact |

Current Appt. Requests
 In Person: Interested
 Never Opened Email
 Patients Without Email
Archived Patients

Unarchive Patients:

1. Use the steps above to view all archived patients.
2. Select the patient(s) to be unarchived by clicking anywhere in a patient’s row that displays white area. **(Note: To select all archived patients, click the checkmark at the top of the checkmark column.)**
3. Once patients’ rows are highlighted, an Unarchive button will appear between the Actions drop-down menu and the search bar in the upper right-hand corner of the screen. Click the Unarchive button.

Archived Patient Registry

Remove All Filters | Archived Patients | Actions | **Unarchive** | Search by name or DOB

| ✓ | First Name | Last Name | DoB | Testi | Survey Date | Intake | Cell Phone | Last Action | Appt Interest | Appointment | Log Contact |
|---|------------|-----------|------------|-------|-------------|--------|------------|-------------|---------------|-------------|-------------|
| ✓ | Reilly5 | test | 1960-10-25 | No | 06/25/2020 | Print | | New | ✓ ? X | | Log Contact |
| ✓ | Reilly12 | test | | No | 06/25/2020 | Print | | New | ✓ ? X | | Log Contact |