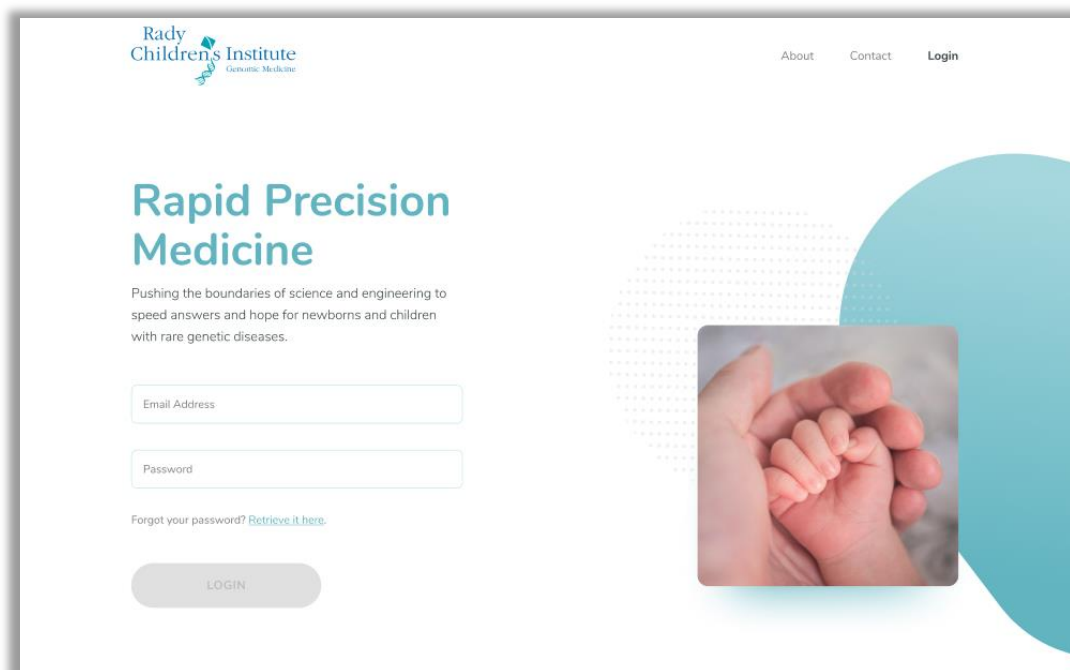


# PORTAL QUICK START GUIDE

Portal v3.0



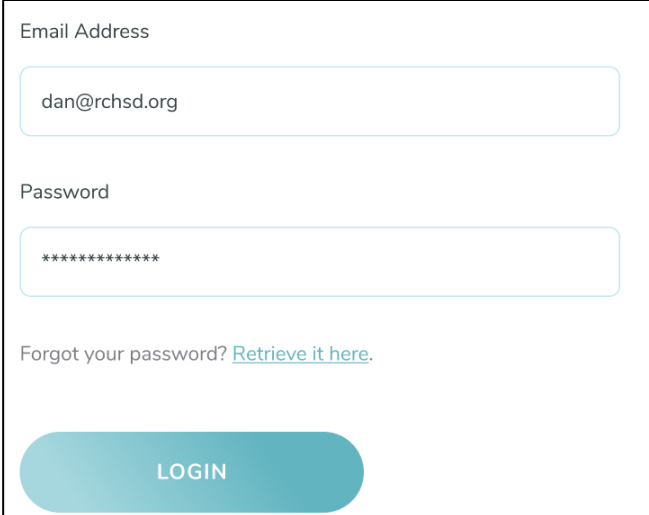
## Overview

This document is intended as a quick reference guide for subject enrollment and order dashboard. For more details, please refer to the comprehensive *Portal User Guide*:

[https://portal.radygenomiclab.com/pdf/RCIGM\\_Portal\\_UserGuide3.0.pdf](https://portal.radygenomiclab.com/pdf/RCIGM_Portal_UserGuide3.0.pdf)

## Logging into the Portal

- Once your account is created, you will receive an email notice from Microsoft with login instructions (refer to multi-factor authentication guide: [https://portal.radygenomiclab.com/pdf/RCIGM\\_Portal\\_Multifactor\\_Authentication3.0.pdf](https://portal.radygenomiclab.com/pdf/RCIGM_Portal_Multifactor_Authentication3.0.pdf))
- Follow the instructions to register your account with Microsoft and select your method of receiving confirmation codes (note, this is for non-RCHSD users only)
- Navigate to the portal and if necessary, click the forgot password link if you need to reset your portal password
- **NOTE:** the Portal is only compatible with Chrome, which you can download from Google if you do not already have it installed.



Email Address

dan@rchsd.org

Password

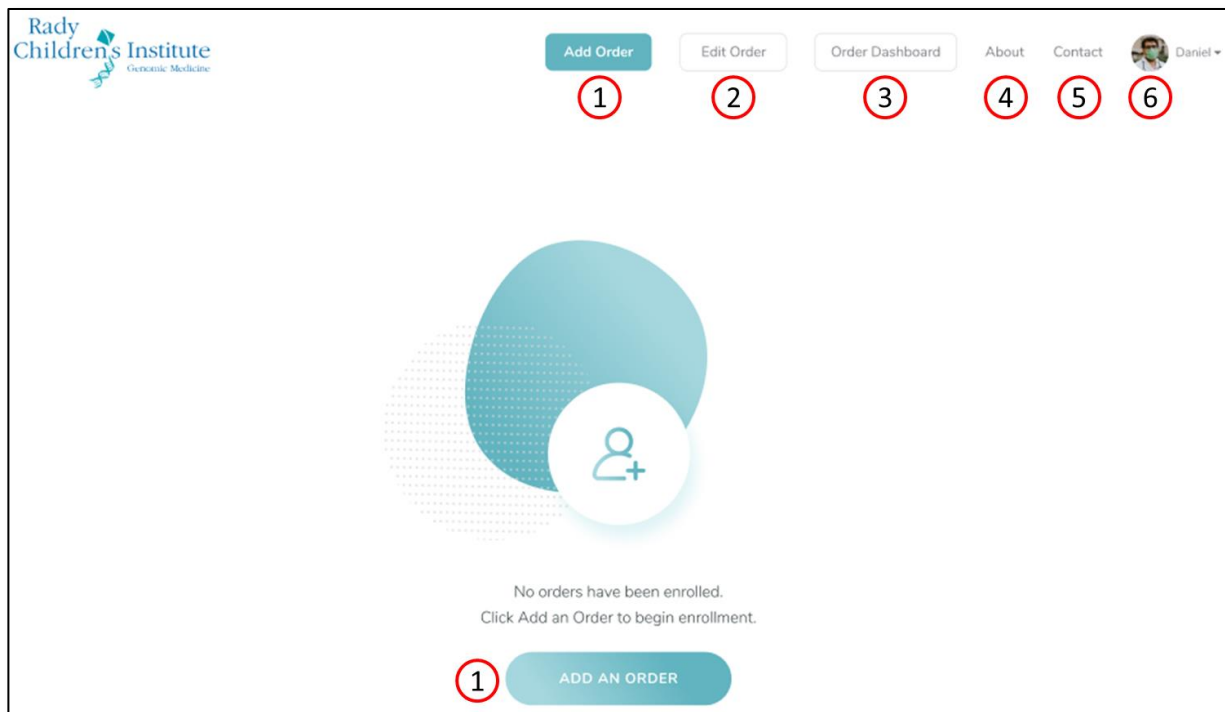
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Forgot your password? [Retrieve it here.](#)

LOGIN


## Site Navigation

- Clicking **Add Order** (1) launches the workflow to enroll subjects. This will be used for both research and fee-for-service enrollments
- Clicking **Edit Order** (2) allows you search for and select an existing case
- Clicking **Order Dashboard** (3) navigates to a page that includes:
  - A list of individuals enrolled in an order (grouped by family/case)
  - Status of orders
  - Ability to search across orders based on user access
  - Ability to download reports when they become available
- Clicking **About** (4) navigates to Rady Children’s Institute for Genomic Medicine home page
- Clicking **Contact** (5) navigates to a Contact Form page where you can enter any questions, concerns, or comments you have on the Portal or RCIGM
- **User Profile** (6): The menu item displays the first letter of the name associated with your user profile The following submenu options are available when the profile menu item is clicked:
  - *Manage Account* allows you to change personal information or your Portal password. Note: To change e-mail and/or institute information, please contact RCIGM. (May come in future release... will update when we know for certain)
  - *Log Out* logs you out of the Portal and navigates to the Home page.



- The following are available within the footer of each page:
  - The *Contact* section provides a phone number and email address to reach out to RCIGM as well as the hours of operation
  - *Terms of Service* navigates to a page detailing the terms of service agreed upon when initially logging into the Portal (there is one for research and one for clinical/ffs).

- *HIPAA compliance statement* navigates to a page that outlines details related to the Portal security and HIPAA compliance.
- *Contact Us/Submit a Problem* leads to the issue form mentioned above
- *What is WGS?* Leads to information about genomic testing and the team at RCIGM
- *Guides & Training* will lead to a section of our Resources page that provides user guides and links to training videos
- *Licenses & Forms* will lead to a section of our Resources page that provides CAP certification, CLIA accreditation, and state license information.

<p><b>CONTACT</b></p> <p>Hours: 9am to 5pm PST (Mon-Fri)          Email: <a href="mailto:RCIGM_rWGS@rchsd.org">RCIGM_rWGS@rchsd.org</a>          Phone: (858) 966-8127          After hours &amp; weekends: (858) 900-5979</p>	<p><b>SERVICE</b></p> <p>Home          Terms of Service          HIPAA Compliance Statement          Contact Us/Submit a Problem</p>	<p><b>RESOURCES</b></p> <p>What is WGS?          Guides &amp; Training          Licenses &amp; Forms</p>	 <p>9487427</p>
<p>© Copyright 2021 Rady Children's Institute for Genomic Medicine</p>			<p>Portal Version: 3.0.0</p>

## Enrollment Workflow (Add Order)

Clicking *Add Order* navigates to the first stage of the enrollment workflow (Order Information). You can move through each stage by entering required information then clicking the Save & Continue buttons.

### Order Information

On the **Order Information** page, select the site/study where the order will be created, Family ID\*, Order Type, and how many family members are expected to have samples sent to the lab.

- \*Family ID is not required. It can be any identifier used within the site or study organization to reference the family being enrolled and is typically a Research ID.

### Register Individual

On the **Register Individual** page, enter relevant details for the subject(s) being enrolled. If individual or sample information is not yet ready for family members, you can click the checkbox 'I'll add this information later' and proceed with just the proband and add family details later.

### Clinical Information

On the **Clinical Information** page, enter relevant clinical information for the subject(s) being enrolled and upload clinical notes or files for the subject. Note, clinical notes are not required to ship a sample but it is strongly encouraged to add clinical notes as soon as possible.

### Sample Details

On the **Sample Details** page, enter physician and Ordering Provider details, then sample details such as sample type. For each sample you will be sending, you will need to click the Add Sample button (i.e. if

there are 2 samples for proband, you will click the add sample button twice and complete 2 sample forms for that individual)

- If the sample type is DNA (extracted), a popup appears to confirm that the testing was done by a CLIA certified laboratory and the CLIA laboratory name must be entered.
- **NOTE:** Once a sample has been accessioned, details for the samples entered can no longer be edited. Contact RCIGM to update any details that were entered incorrectly.

## Sign & Print

On the **Sign & Print** page you can do the following:

- The ordering provider, representative thereof, or another authorized signer like a genetic counselor can provide his/her electronic signature here which will automatically be applied to the requisition form (electronic signing is optional).

Electronic Signature


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The undersigned person (or representative thereof) certifies as follows:

- 1) I am a licensed medical professional authorized to order genetic testing;
- 2) appropriate informed consent by the patient and/or parent/guardian has been obtained and documented;
- 3) testing as ordered is medically necessary; and
- 4) all information on this Test Requisition Form is true and correct to the best of my knowledge.

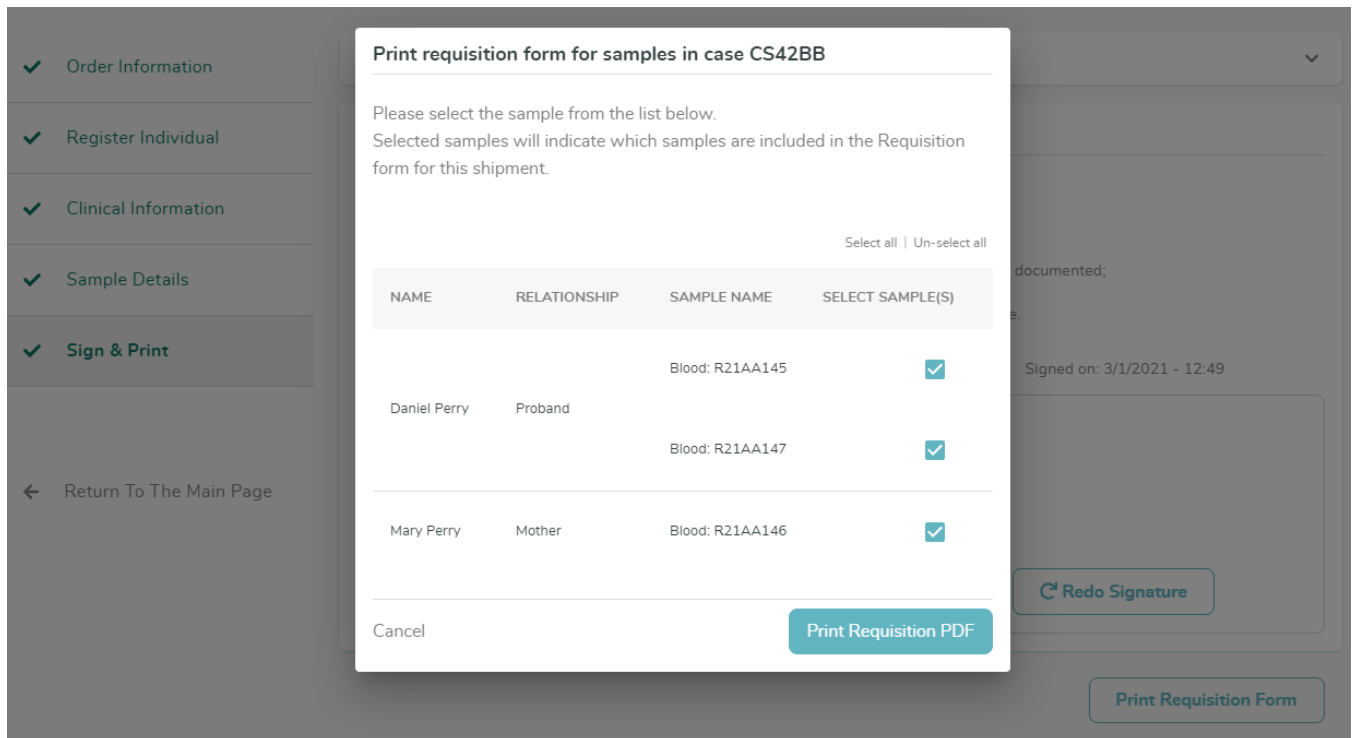
Ordering Provider Signature Signed on: 04/22/21 - 16:53 PM

Draw your signature here



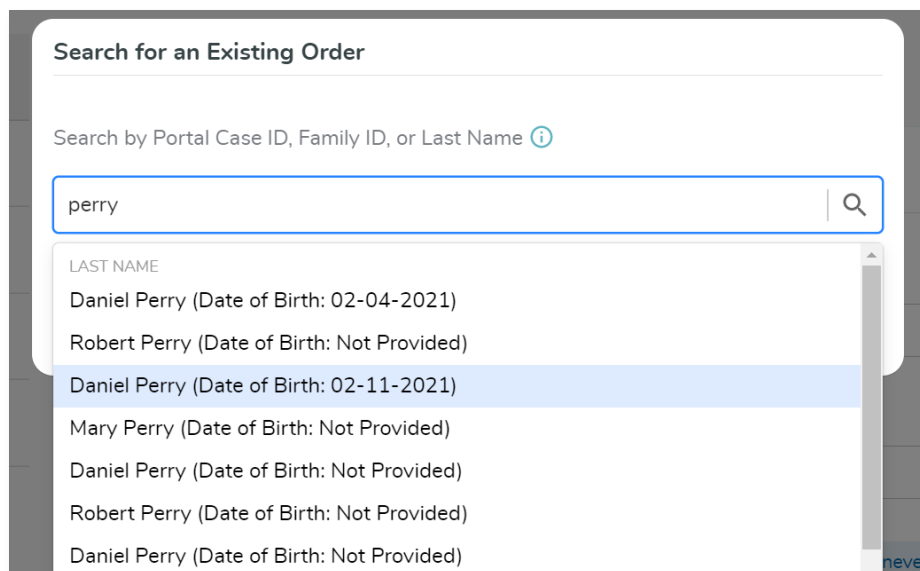
[Redo Signature](#)

- If any details need to be edited or added, you can return to that stage of the workflow by clicking the left navigation panel.
  - To enroll another subject, click **Register Individual** in the left panel
- Once all information is validated, click **Print Requisition Form** to select samples that will be included in the shipment and generate a requisition form to print and send with the samples



## Edit Order

- To edit a previously created order or enroll a subject into an existing case, click the *Edit Order* button as mentioned above.
  - A popup box is opened to search for the existing case based on the system-generated case ID, the user-specified family ID, or last name.
  - As you type, there will be suggestions of matching cases/families that you can click.



- Click *Edit this Order* to pick the case and close the popup

**Search for an Existing Order**

Search by Portal Case ID, Family ID, or Last Name ⓘ

Daniel Perry (Date of Birth: 02-04-2021) x | 🔍

PORTAL CASE ID: CSBC5B | FAMILY ID:

Daniel Perry	Proband	02-04-2021
ID #1: firstID1 ID #2: secondID2	Mother	

Cancel Edit this Order

## Order Dashboard

Clicking *Order Dashboard* navigates to a page with the following features:

- A list of all families and individuals enrolled in the study (grouped by family) (1)
- Global search across studies based on user access (2)
- Ability to download reports as they become available (3)
- Ability to expand rows to see more detail about each individual (4)

Rady Children's Institute  
Genomic Medicine

Add Order Edit Order **Order Dashboard** About Contact Daniel

Search Orders here 🔍 (2) Refresh

PORTAL CASE ID: CS51AR9 | FAMILY ID: TEST 123  
ORDER TYPES: RGWS PROBAND TRIO UCSFMB\_CLINSVCS

Name	Relationship	Enroll Date	Status	Report Status	Details
Narayanan Veeraraghavan	Proband	02/12/2020 - 2:38 pm	Registered	Preliminary - Download (3)	(4)
Eliza Veeraraghavan	Mother	02/03/2020 - 5:12 pm	Completed	No Report Uploaded	(+)
Father	Father	02/12/2020 - 2:38 pm	Accessioned	No Report Uploaded	(+)

PORTAL CASE ID: CA28OP1 | FAMILY ID: TEST FAMILY  
ORDER TYPES: RGWS PROBAND ONLY, DNA ISOLATION AND HOLD RCHSD\_CLINSVCS

Name	Relationship	Enroll Date	Status	Report Status	Details
Richard Richardson	Proband	11/10/2020 - 10:33 am	Rejected	No Report Uploaded	(+)

- Clicking the + sign on any row will provide additional detail about that individual including links to download reports, clinical notes, and raw genomic data (if available)
- Clicking Edit Individual takes you back to the workflow where you can edit details

The screenshot displays a web interface for managing clinical data. On the left, a table lists individuals with columns for Relationship, Enroll Date, Status, Report Status, and Details. The table is divided into sections by Family ID (MILY ID). The first section, 'REFLEX TO TEST FAMILY MEMBERS', includes a Father, Mother, and Proband, all with 'Registered' status. The second section, 'PERRY123 ONLY', includes a Proband with 'Registered' status. The third section, 'OSFCHOL\_CLINVSVC', includes a Mother and Proband, both with 'No Sample' status. A right-hand panel provides detailed information for the selected individual, including personal details, clinical information, and sample details for two samples.

Relationship	Enroll Date	Status	Report Status	Details
Father	4/23/2021 - 11:34 AM	Registered	No Report Uploaded	+
		Registered	No Report Uploaded	
Mother	4/23/2021 - 11:25 AM	Registered	No Report Uploaded	+
Proband	4/23/2021 - 11:10 AM	RWGS: Completed	Report(s) Available	+
		Registered	No Report Uploaded	

Relationship	Enroll Date	Status	Report Status	Details
Proband	4/22/2021 - 3:54 PM	Registered	No Report Uploaded	+

Relationship	Enroll Date	Status	Report Status	Details
Mother	4/22/2021 - 1:13 PM	No Sample	No Report Uploaded	+
Proband	4/22/2021 - 1:07 PM	No Sample	No Report Uploaded	+

Relationship	Enroll Date	Status	Report Status	Details
Mother	4/22/2021 - 1:13 PM	No Sample	No Report Uploaded	+
Proband	4/22/2021 - 1:07 PM	No Sample	No Report Uploaded	+

Relationship	Enroll Date	Status	Report Status	Details
Mother	4/22/2021 - 1:13 PM	No Sample	No Report Uploaded	+
Proband	4/22/2021 - 1:07 PM	No Sample	No Report Uploaded	+

ENROLLED 4/23/2021 - 11:10 AM  
**CS014F / r2018-000**  
 NCH\_rWGS

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**INDIVIDUAL DETAILS**

Name: Diana Soler  
 Relationship: Proband  
 Date of Birth: 8/20/2003 - 12:00 AM  
 Individual ID: IN7282  
 Medical Record No: 00000000

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**CLINICAL INFORMATION**

Clinical Notes: [Clinical Note\(s\) Available](#)  
 Affected Status: Affected

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**SAMPLE #1 DETAILS**

Sample Name:  
 Sample Type: Blood  
 Date Collected: 4/23/2021 - 12:30 PM  
 Status: **RWGS: Completed**  
 Report Status: [Report\(s\) Available](#)

---

**SAMPLE #2 DETAILS**

Sample Name:  
 Sample Type: Blood  
 Date Collected: 4/23/2021 - 12:30 PM  
 Status: **Registered**  
 Report Status: No Report Uploaded

[Edit Individual](#)