



Progeny 10

Web User Guide

Progeny 10 Full User Guide -Table of Contents

This user guide will allow users to follow a list of topics to learn how to use the Progeny Clinical application through your web browser.

The Table of Contents below are hyperlinked to the topics within this document.

Contents

Progeny 10 Full User Guide -Table of Contents	1
Progeny 10: TOP NEW FEATURES	5
IDENTIFYING AT RISK PATIENTS	6
Getting Started.....	7
Using the Manual	7
Logging Into the Progeny Web Client	7
Login screen	7
Alternative Starting Screens	8
Patients View	8
1. PATIENTS ACTION MENU	8
1. ONLY PROBANDS.....	9
2. INVITE PATIENT	9
3. NEW PATIENT.....	10
Dashboard View	12
Pedigrees Dashboard	13
User Profile	13
Help	14
Navigation Bar.....	14
Window Panes	15
Smart list	16
Smart Search	17
Actions Menu	17
Pedigree Screen	18

TOOLBAR	18
INDIVIDUAL MENU	24
RELATIONSHIP LINE MENU	24
RIGHT-CLICK MENU	25
ONE – CLICK ADD	26
DATA FIELDS.....	26
CANCER LEGEND	26
SUBTEXT	27
PROBAND	27
Cancer Risk Assessment.....	27
FEATURES:.....	29
RISK ASSESSMENT RESULTS	31
Individual Dashboard	31
Creating Individuals.....	32
Copying Individuals	33
Moving Singlets to Pedigrees.....	33
Deleting Individuals.....	33
Individual Datasheet Screen	34
Applying Individual Datasheet Formats.....	34
Data Field Types	34
Invites – Family History Questionnaire	36
Invite Status	36
1. SELECT QUESTIONNAIRE.....	37
2. INVITE STATUS	37
3. INVITED BY	37
4. INVITED WITHIN.....	37
5. STARTED WITHIN	37
6. COMPLETED WITHIN.....	37
7. QUERY FORMATS	37
8. INVITE PATIENT	39
9. ACTIONS MENU.....	44

Edit Questionnaires.....	45
1. SAVE	46
2. NEW QUESTIONNAIRE	46
3. DELETE QUESTIONNAIRE	46
4. COPY QUESTIONNAIRE.....	46
5. GENERAL SETTINGS.....	46
6. EMAIL SETTINGS.....	46
7. STATUS ACTIONS.....	47
8. LOGIN SCREEN.....	47
9. PROFILE PAGE	47
10. CONSENT PAGE	47
11. DATASHEET	48
12. FAMILY BUILDER	48
13. ADDITIONAL FAMILY	48
14. FAMILY TABLE	48
15. FINAL NOTES	48
16. SUMMARY PAGE	48
17. RELATIVES INVITES	49
18. SUBMIT PAGE.....	49
Email Templates.....	50
Formats	51
Pedigrees.....	51
Individuals	52
Spreadsheets.....	54
Orders	56
Registering	56
Ordering Genetic Tests	56
Order Status.....	57
Smart Search	58
Actions Menu	58
Link Order to Patient.....	59

Patient Letter Generator.....	60
Creating a New Letter Template.....	60
Letter Generator Buttons.....	60
Creating Patient Letters	63
Patients Screen	63
Pedigree Viewer	63
Individual Datasheet	63
Spreadsheets and Queries	64
BUILDING SPREADSHEETS.....	65
BUILDING QUERIES	66
ORDER OF OPERATIONS FOR A QUERY:.....	66
LOGICAL OPERATORS.....	67
RUNNING SPREADSHEETS.....	69

Progeny 10: TOP NEW FEATURES

LETTER GENERATION

Create letter templates that include database fields and quickly generate letters, notes, and reports for any patient.

PROGENY APP

Use our free iPad application to access your database allowing more flexible and personal contact with your patients.

EMR HYPERLINK

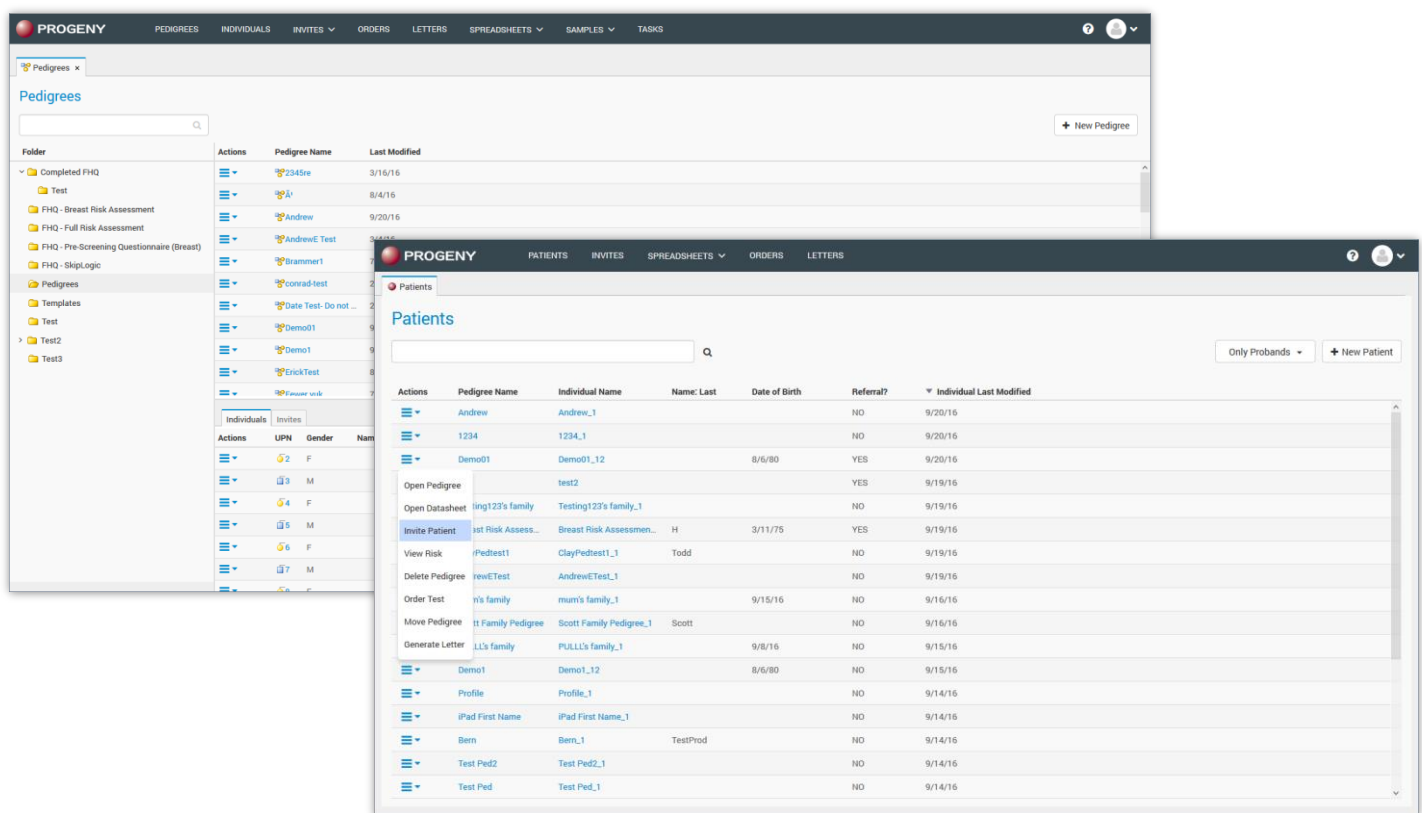
Embed a Pedigree Hyperlink in a Patient's Record.

NEW INTERFACE DESIGN

Our updated modern design looks great and makes it easier and more intuitive to navigate.

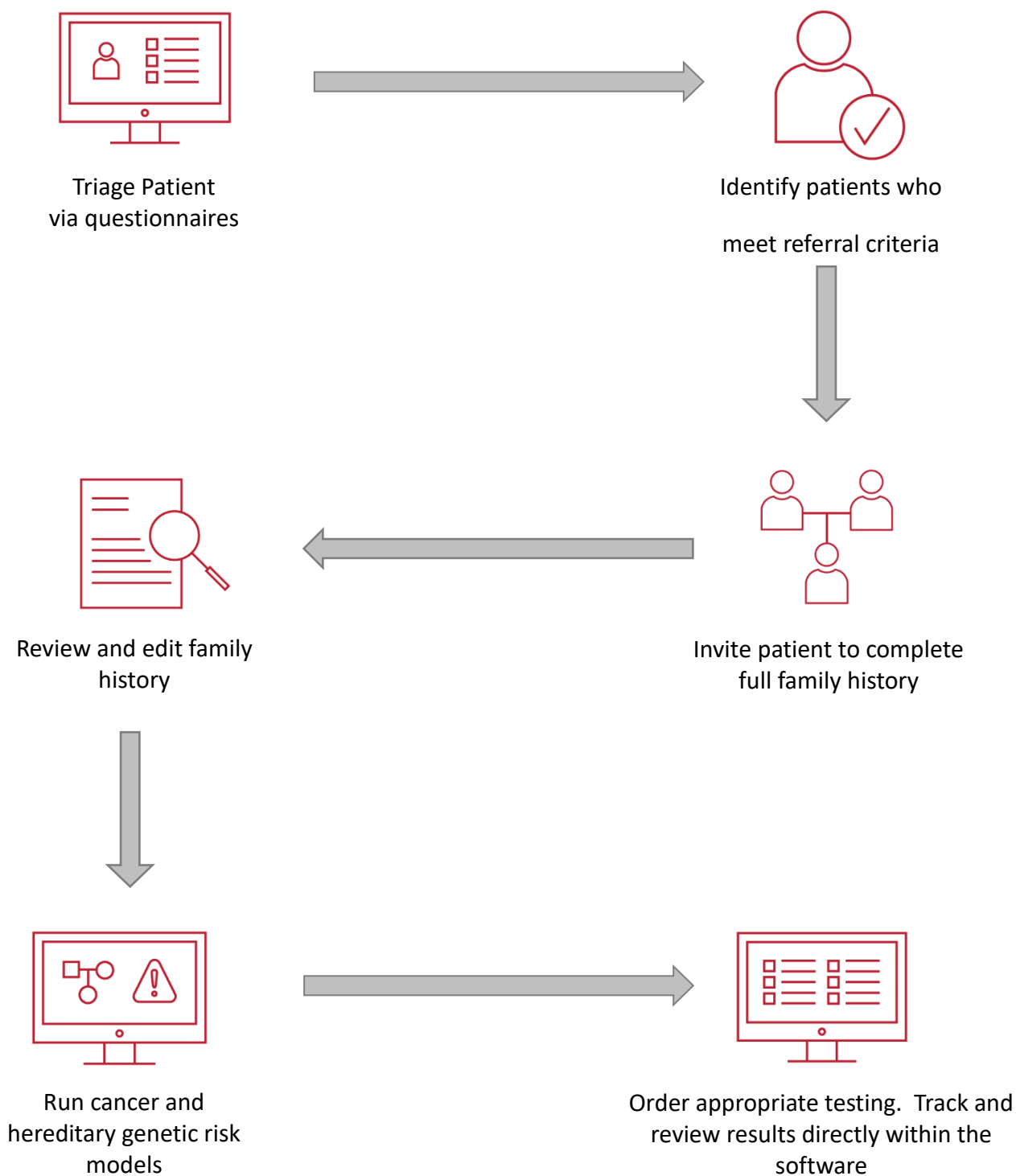
SPEED

Upgraded database engine provides faster and more reliable performance.



Progeny 10 has a new look and feel - making it easier for you to read, find, and navigate screens.

IDENTIFYING AT RISK PATIENTS



Getting Started

Using the Manual

Welcome to the Progeny Software User Guide. The purpose of this User Guide is to answer your questions and guide you through the procedures necessary to use the Progeny Clinical application. You will find this User Guide easy to use where you can simply look up the topic in the table of contents and select the topic to link directly to that page.

Logging Into the Progeny Web Client

Trial user?

Open your web browser and go to <http://cloudtrial.progenygenetics.com>

Use your provided credentials to log in. Default password is set to **Cloud2016**. You will be prompted to change this at your first login. During your first log in, please be sure to update your profile with first name, last name, and email address

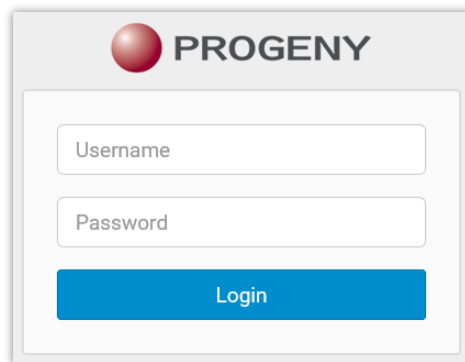
Keep in mind!

This profile information will be required for support and unlocking accounts after unsuccessful logins. All password resets will be sent to the email stored in this profile. If this information is not entered, the account will remain locked and you will need to create a new account

Already Have an Account?

The login URL, username, and password should be provided to you by your Progeny administrator

Login screen

The image shows a login screen for Progeny. At the top, there is a red sphere icon followed by the word "PROGENY" in bold, uppercase letters. Below this, there are two input fields: "Username" and "Password". At the bottom of the form is a blue button with the word "Login" in white text.

Fill in your **Username** and **Password**

If you have more than 1 database,
use the dropdown to choose your database.

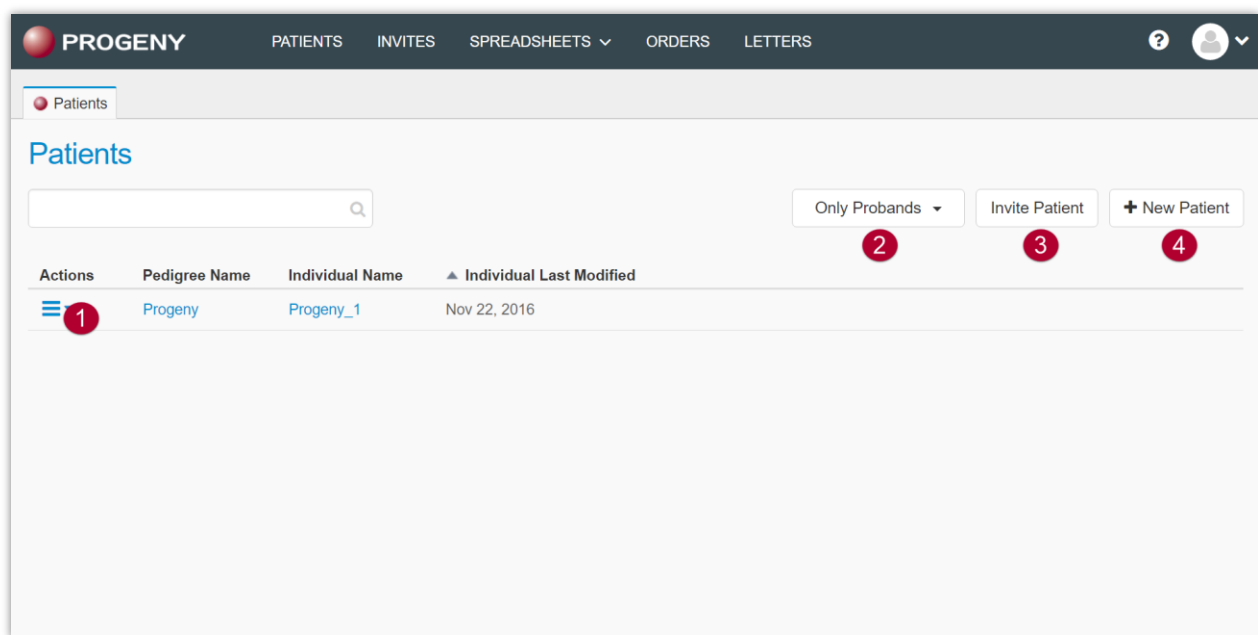
Need Immediate Assistance?

Contact support at support@progenygenetics.com or call **1-800-PROGENY**

Alternative Starting Screens

Progeny has three different views that you can log into: the Full, the Patients, and the Dashboard views. This manual focuses on the Full Client view as it has access to the most functions of all three views.

Patients View



This view has the ability to create patients, build and run spreadsheets, and send and review FHQ (Family History Questionnaire) invitations.

1. PATIENTS ACTION MENU
2. ONLY PROBANDS
3. INVITE PATIENT
4. NEW PATIENT

1. PATIENTS ACTION MENU

Actions Menu provides quick access to functions within the application for your clinical workflow. This is located within your Patients screen.

- **Open Pedigree** – Opens the Pedigree for this Individual patient.

- **Open Datasheet** – Opens the Individual Datasheet for this patient.
- **Invite Patient** – Sends an invitation to a patient using the (FHQ) Family History Questionnaire module for the patient to fill out their family history and design their pedigree on their own time.
- **View Risk** – Open the Risk calculations screen (BRCAPro, MMRPro, PancPro, MelaPro, Tyrer-Cuzick, Premmm, Gail, and Claus) associated to the selected patient.
- **Delete Pedigree** – Deletes the selected Pedigree and ALL of the associated Individuals within the Pedigree. Note, deleting this is permanent, take caution with this step.
- **Order Test** – Initiates the Order Test confirmation screen to place a genetic test order from Ambry Genetics.
- **Move Pedigree** – Opens a prompt screen to move the selected Pedigree and all of the Individuals to a different folder directory.
- **Generate Letter** – Opens the Letter Generator tool to generate custom letters for patients

Patients						
				Only Probands ▾		
Actions	Pedigree Name	Individual Name	Date of Birth	Gail 5 Year Breast Risk	MelaPro 5 Year	
☰ ▾	18	18_1	2/16/81	0.2	0.2	
☰ ▾	19	19_1	7/16/87		0	
☰ ▾	20	20_1	12/20/13			

Click on the Pedigree name or number to open the Pedigree or click the Individual Name/number to view the Individual Datasheet.

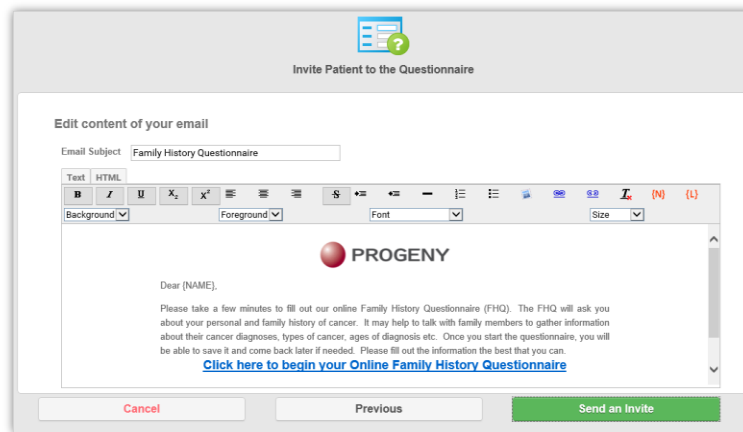
1. ONLY PROBANDS

Click the dropdown option to choose to view all Individuals in the database or only the Probands.

2. INVITE PATIENT

Progeny helps the clinicians to send invitations to patients via email or link.

Sending a questionnaire to a new patient



An automated way to have your patients fill out their own Family History Questionnaires on their own time, then submit the Pedigree information directly to your database.

1. From the Patients screen, click Invite Patient button to begin the new patient invitation
2. Choose to Invite new Patient
 - a. This quick start only covers invitations for New Patients, not existing patients in the database
3. Select a Questionnaire you want to send the patient invitation to
 - a. Breast Risk Assessment
 - b. Full Risk Assessment
 - c. Pre-Screening
4. Choose the Folder Name where the Pedigree will be saved
5. Give your patient a Family Name (pedigree name)
6. Choose the Gender of the Proband for this family
7. Enter an Email address for the recipient (Proband) who will be filling out the questionnaire
8. Edit the content of your email if necessary
9. Send Invite to Patient

3. NEW PATIENT

Adding a new patient and creating the Pedigree

Click the +New Patient button at the top right of the screen to open a new patient builder wizard, then follow the steps to design a Pedigree for the Proband patient.

1. Adding a New Pedigree
 - a. Choose your folder where the pedigree is saved
Note: the folder may be pre-selected or grayed out due to security permissions on your user account
 - b. Give the Pedigree a name
2. Choose the Gender of the Proband and click next to build the rest of the family

3. Click the Draw Now button to manually draw the family members, or click next and add all family members via relatives table for quick entry. Click next to construct the Pedigree. Below is a built Pedigree image of the process described above.

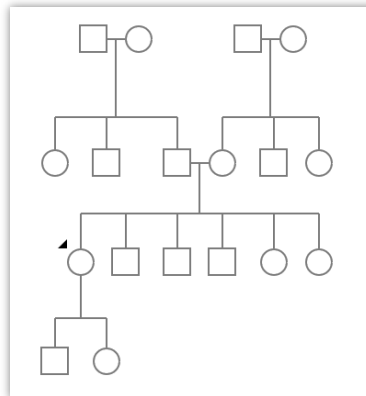
Folder Name: Pedigrees
Pedigree Name: Smith Family
Gender: ☐ Male ☒ Female

Cancel Draw Now Next

Enter the number for each Proband relative

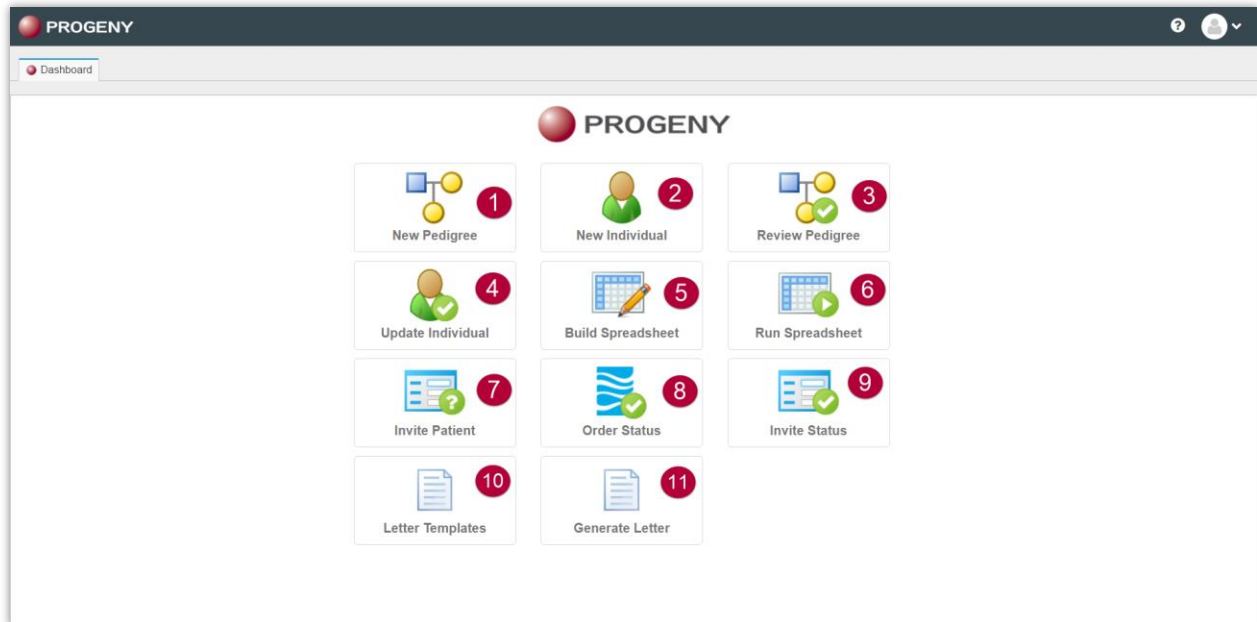
Brothers	3
Sisters	2
Sons	1
Daughters	1
Paternal Uncles	1
Paternal Aunts	1
Maternal Uncles	1
Maternal Aunts	1

Cancel Previous Next



Congratulations! You've just successfully created a Pedigree using Progeny!

Dashboard View

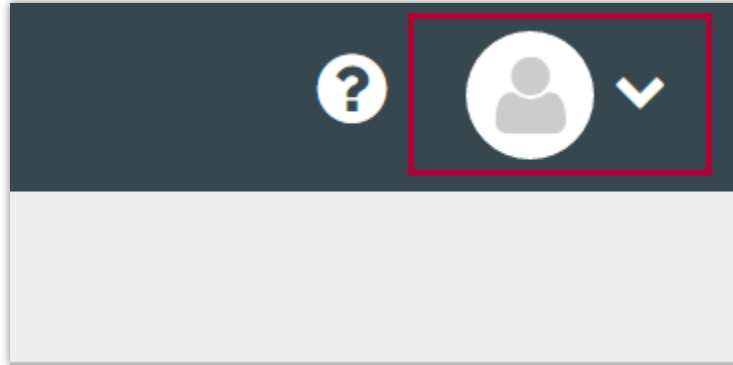


This view has buttons that can be clicked to perform the action displayed. This view is better for users who are new to Progeny. Different modules will be displayed based on the user's permissions.

- 1.** NEW PEDIGREE
- 2.** NEW INDIVIDUAL
- 3.** REVIEW PEDIGREE
- 4.** UPDATE INDIVIDUAL
- 5.** BUILD SPREADSHEET
- 6.** RUN SPREADSHEET
- 7.** INVITE PATIENT
- 8.** ORDER STATUS
- 9.** INVITE STATUS
- 10.** LETTER TEMPLATES
- 11.** GENERATE LETTER

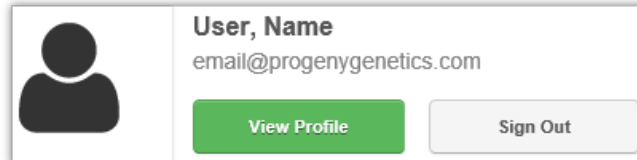
Pedigrees Dashboard

User Profile



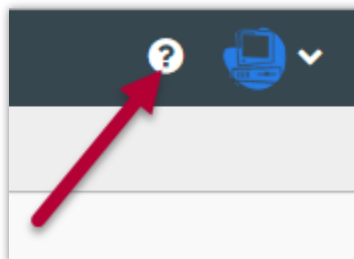
Users in Progeny can manage their basic user profile. On the upper right side of the page, click the drop-down arrow next to the image and select View Profile or you can also click the image.

If a name and email has already been entered for a user account, it will then be displayed. Users can also sign out of Progeny by clicking 'Sign Out'. 'View Profile' opens another window with the profile information.



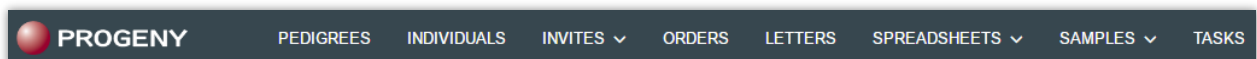
Here the user can view/edit their first and last name, email address, and their profile picture. Users can also change their password by checking the 'Change Password' checkbox and entering their old password, new password, and confirm new password.

Help



If you need additional assistance with using progeny, there is a help button next to the login logo that can be clicked which then opens the Progeny User Guides web-page. From that page you can review the different user guides as well as other help sections such as contacting support and reviewing the knowledge base.

Navigation Bar



The different modules in Progeny are displayed on the top of the page. Access to certain modules will only be available depending on your institution's licensing with Progeny as well as the user permissions for your user account. Use the tool bar by clicking on a module to open the tab to that specific module.

Some modules will have a drop down to click so that additional actions pertaining to that model can be displayed.

Pedigrees – opens the Pedigrees module to review pedigrees in the database.

Individuals – opens the Individuals module to review individuals in the database.

Invites: Invite Status – opens the Invites module to review invitations.

Invites: Edit Questionnaires – opens the Edit Questionnaires module to customize the FHQs.

Invites: Email Templates – opens the Email Templates module to edit the FHQ email templates.

Orders – opens the Orders module to review the order status for Ambry genetic tests.

Letters – opens the Letters module to edit letter templates.

Spreadsheets: Individual Spreadsheets – opens the Individual Spreadsheets module to create and load spreadsheets for the individual level.

Spreadsheets: Pedigree Spreadsheets - opens the Pedigree Spreadsheets module to create and load spreadsheets for the Pedigree level.

Spreadsheets: Sample Spreadsheets - opens the Sample Spreadsheets module to create and load spreadsheets for the Sample level.

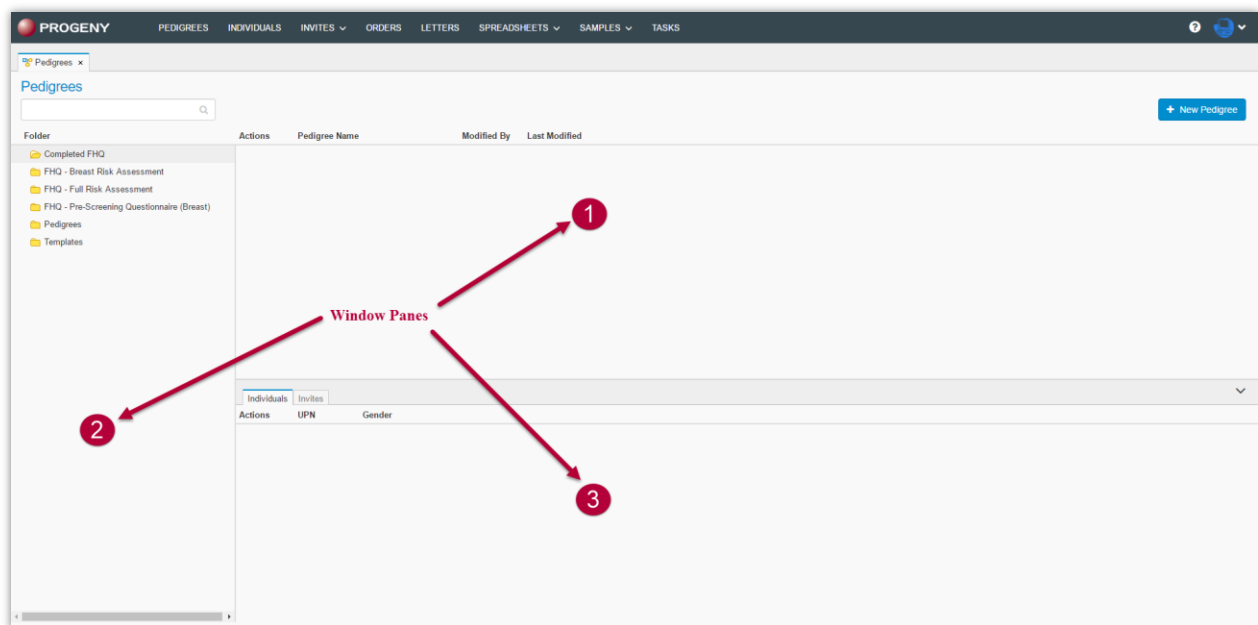
Samples - Samples – opens the Samples module.

Samples - Containers – opens the Containers module.

Samples - Inventory – opens the Inventory module.

Tasks – opens the Tasks module.

Window Panes



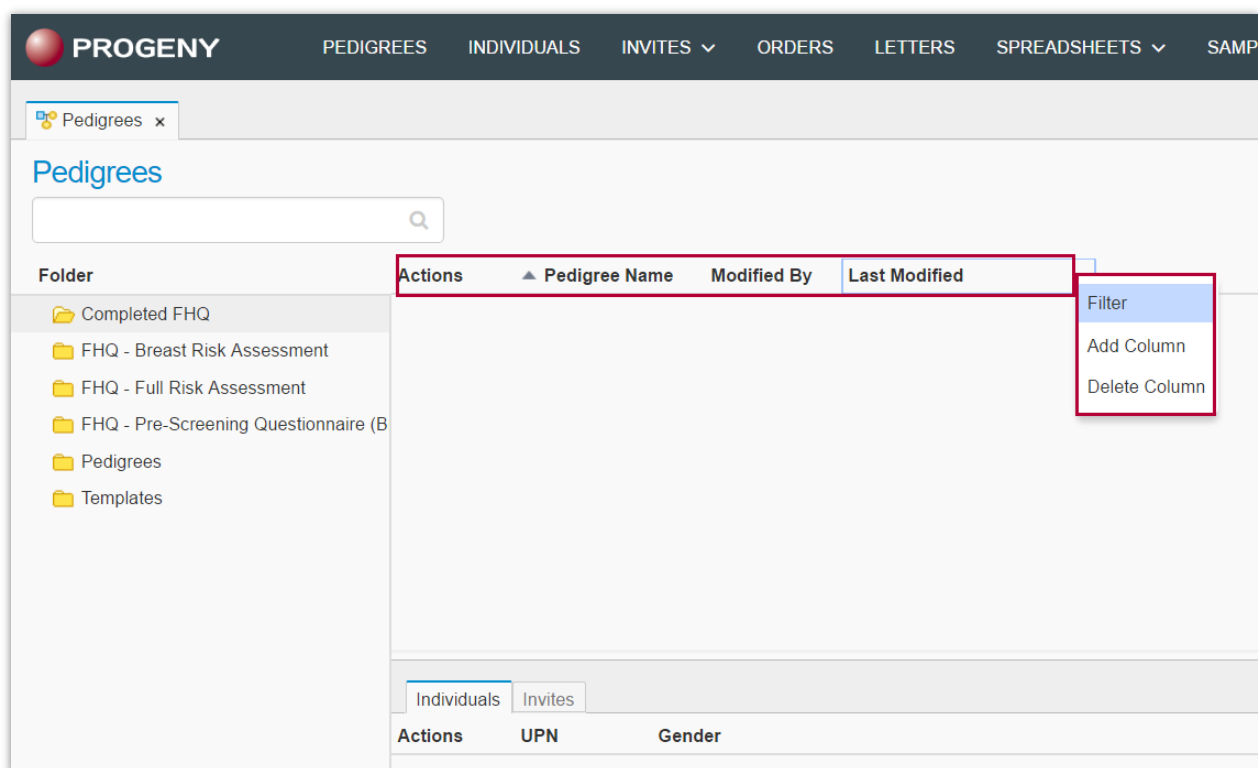
Progeny has three main window panes. The left vertical pane displays the folder organization for a particular functional area in a Windows Explorer-style structure. Click on a folder in the pane to open the folder. As folders and sub-folders are opened in this pane, detailed information about the folder's

content is displayed in the upper and lower horizontal panes on the right (information is displayed in the bottom pane when an item is highlighted in the upper pane).

The folders displayed in the left pane will correspond with the module selected (pedigrees, individuals, or samples, for instance). The panes to the right correspond to parent items on top and sub items below. For example, if the user is in the Pedigrees module and highlights a pedigree, all of the individuals attached to that pedigree are displayed in the lower-right pane. Likewise, if the user is in the Individuals module and highlights an individual then all samples attached to that individual are displayed in the lower-right pane.

Smart list

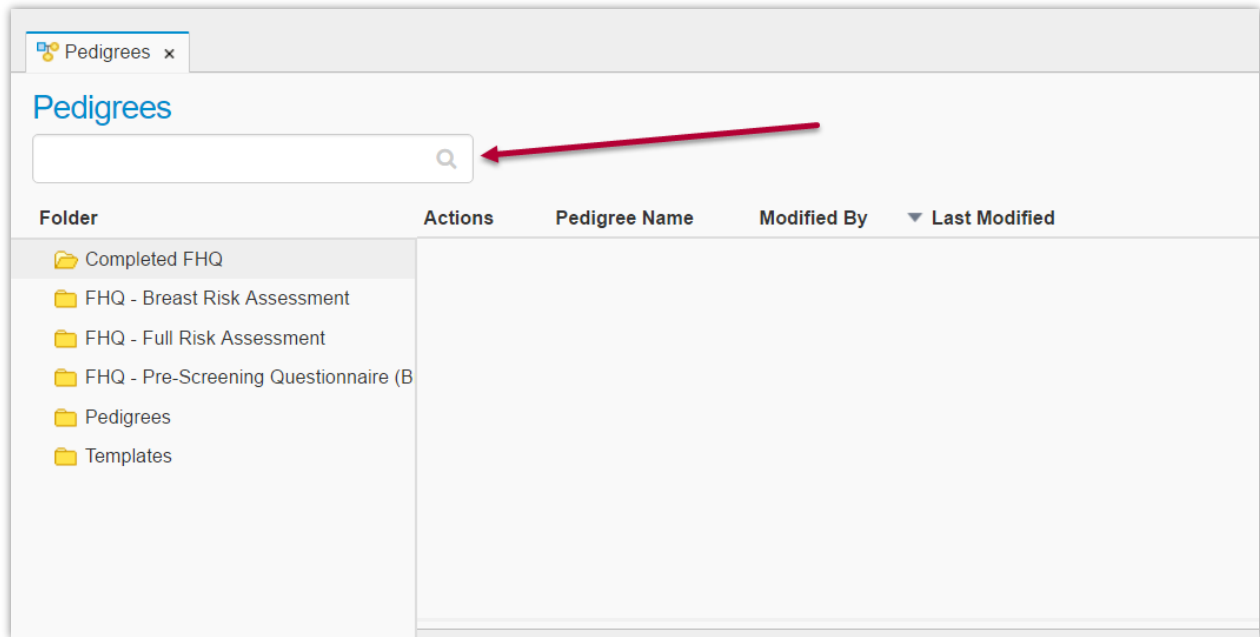
A list of uniquely chosen data fields to display on the main screen for quick view. These fields are used to search the data quickly from the smart search feature. The search results only display the data found in the fields on the smart list.



1. **Filter** – Filters the view by any field in the smart list so that you can specify the type of filter for that column.
2. **Add Column** – Smart list allows you to add any field within the database to this quick view list.
3. **Delete Column** – Deletes any column from the list.

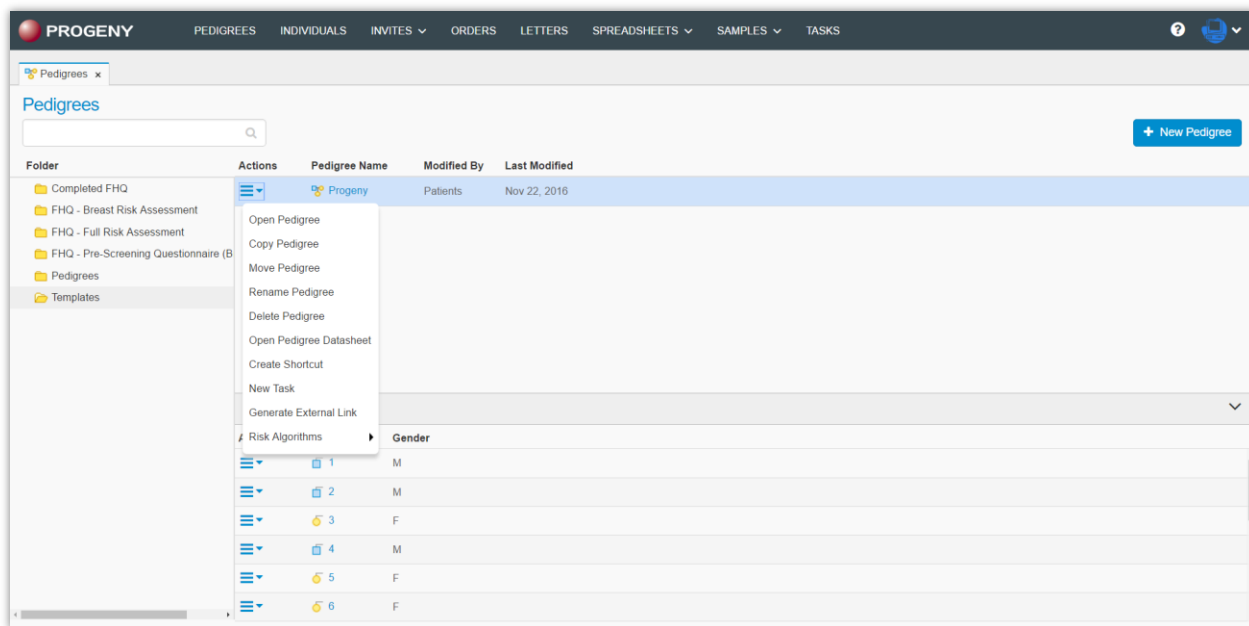
Smart Search

Searches only the data that is displayed in the columns in your smart list (Smart List details). The search is limited to the exact order of the characters in the string. The asterisk (*) is a wildcard that can be used to extend the search.



Actions Menu

Actions Menu provides quick access to functions within the application for your clinical workflow.



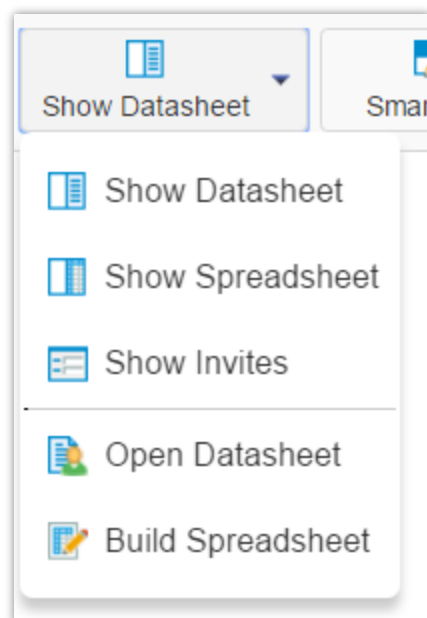
- **Open Pedigree** - opens the pedigree canvas for that pedigree.
- **Copy Pedigree** - creates a copy of the pedigree in the specified folder.
- **Move Pedigree** - moves the pedigree to another folder location.
- **Rename Pedigree** - renames the pedigree with another option to rename individuals.
- **Delete Pedigree** - deletes a pedigree and the individuals in that pedigree from the database.
- **Open Pedigree Datasheet** - opens the pedigree datasheet based on the default datasheet for that pedigree.
- **Create Shortcut** - creates a shortcut of the specified pedigree in a specified location so that changes can be made to the shortcut without touching the original pedigree with an option to open the shortcut pedigree once saved.
- **New Task** - allows the creation of a task in relation to the pedigree.
- **Generate External Link** - generates an external link to view the pedigree.
- **Risk Algorithms** - exports pedigrees to the specified risk file format.

Pedigree Screen

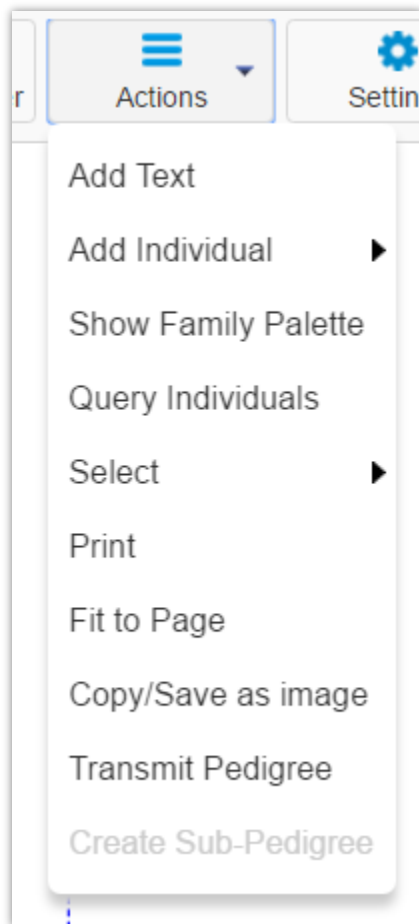
TOOLBAR



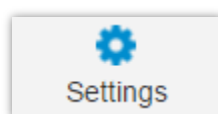
- **Save** – saves the current pedigree and any changes that were made.



- **Show Datasheet/Hide Datasheet** – displays or hides the datasheet in split view for an individual when that individual is selected.
- **Show Spreadsheet/Hide Spreadsheet** - displays or hides a selected/default spreadsheet for the current pedigree.
- **Show Invites/Hide Invites** – displays or hides the invite pane for the individuals on the pedigree.
- **Open Datasheet** – opens the datasheet in full view for the selected individual.
- **Build Spreadsheet** – builds/loads a spreadsheet for the current pedigree.
- **Smartdraw** – applies the Smartdraw feature to redraw the pedigree depending on the customized Smartdraw settings.
- **Show/Hide Risk** – opens the Risk Assessment tool. [Click here for more details](#)
- **Order Test** – opens the Ambry Order iframe to order genetic tests for the selected individual.
 - **Continue with Order** – regular Ambry test order as in AP2.
 - **Continue with Pre-verification** – submits pre-verification for insurance before placing the complete order.
 - **Map Fields** – used to map the basic fields for the Ambry TRF.
- **Generate Letter** – generates a letter for the selected individual based on the letter template selected.
- **Actions** – different actions to perform.



- **Add Text** – adds a customized pedigree text.
- **Add Individual** – adds a male or female to the pedigree canvas.
- **Show Family Palette** – displays the family palette to add individuals to the pedigree.
- **Query Individuals** – displays the individuals on the pedigree based on the specified query.
- **Select** – selects the specified family relationship on the pedigree.
- **Print** – prints the pedigree based on the selected orientation, page size, and print settings.
- **Fit to Page** – fits the pedigree on the pedigree canvas based on the selected orientation, page size, and margins.
- **Copy/Save as image** – opens the image in an iframe to allow right clicking to copy/save the pedigree as an image.
- **Transmit Pedigree** – transmits the pedigree to an EMR (if configured).
- **Create Sub-pedigree** – creates a sub pedigree of the selected individual(s) in the specified folder.
- **Settings** – different options for customizing the pedigree display, pedigree dimensions, Smartdraw options, and formats.



- **Pedigree Display** – customizes the display on the pedigree canvas.

The image shows a 'Pedigree Settings' dialog box with a sidebar on the left containing four categories: 'Pedigree Display' (selected), 'Pedigree Dimensions', 'Smartdraw Options', and 'Formats'. The main area is divided into two sections. The top section contains a grid of 12 checkboxes arranged in three columns. The bottom section contains four input fields: 'Proband Arrow Position' (a dropdown menu set to 'Upper Left'), 'Icon Subtext Font' (a dropdown menu set to 'Times New Roman' with a font size of '8' next to it), 'Header' (a text box containing 'Disney'), and 'Footer' (an empty text box). A 'Close' button is located in the bottom right corner.

Pedigree Display Settings		
☐ Show Grid	☒ Show Symbols Legend	☐ Show Invite Status
☒ Snap To Grid	☒ Show Subtext Legend	☐ Show Linkage Settings
☒ Show Page Breaks	☒ One Click Add	☒ Use Hooks
☒ Show Header	☒ Auto Draw	☐ Show Blue ID #
☒ Show Footer	☒ Show Haplotypes	☒ Show Date

Proband Arrow Position: Upper Left

Icon Subtext Font: Times New Roman 8

Header: Disney

Footer:

Close

- **Show Grid** – displays a grid on the pedigree canvas.
- **Snap To Grid** – snaps the individuals on the pedigree to the edges of the grid lines.
- **Show Page Breaks** – displays the print boundaries as dashed blue lines.
- **Show Header** – displays the header on the pedigree canvas.
- **Show Footer** – displays the footer on the pedigree canvas.
- **Show Symbols Legend** – displays the symbols legend for the specified symbol format.
- **Show Subtext Legend** – displays the subtext legend for the specified subtext format.
- **One Click Add** – activates the one-click add features (the yellow triangles around an individual when selected).
- **Auto Draw** – automatically runs Smartdraw on the pedigree when new individuals are added to the pedigree.
- **Show Haplotypes** – displays a colored-coded legend for markers that are displayed on a pedigree.
- **Show Invite Status** – displays the invite status for individuals on the pedigree.
- **Show Linkage Settings** – displays the linkage sample status on the pedigree (Sample/Plate/Genotype) and indicates whether an individual has been “Included in Analysis”.
- **Use Hooks** – enables the hooks feature to improve the visual appearance of intersecting relationship lines.
- **Show Blue ID #** - displays the numerical order, from left to right, for each individual in their generation.
- **Show Date** – displays the date in the upper left corner of the pedigree canvas.
- **Proband Arrow Position** – changes the position of the proband arrow on the pedigree canvas.
- **Icon Subtext Font** – changes the font and font size for the pedigree subtext.

- **Header** – changes the header text.
- **Footer** – changes the footer text.
- **Pedigree Dimensions** – changes the dimensions for the pedigree.

Pedigree Settings
✕

Pedigree Display

Pedigree Dimensions

Smartdraw Options

Formats

Line Width

1

Scale

100

Icon Size

27

Sibling Line Height

39

Y-Subtext Spacing

29

Individual Space

55

x

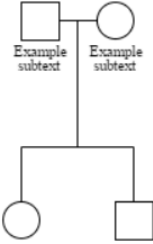
143

Grid Space

7

x

27



Close

- **Line Width** – changes the width of the relationship lines.
- **Scale** – changes the magnification level of the pedigree.
- **Icon Size** – changes the size of the individual icons.
- **Sibling Line Height** – changes the height of the sibling relationship line.
- **Y-Subtext Spacing** – changes the vertical spacing for the subtext.
- **Individual Space** – changes the spacing between individuals.
- **Grid Space** – changes the width and height of the grid.
- **Smartdraw Options** – customizes the options for the Smartdraw feature.

Pedigree Settings [X]

- Pedigree Display**
 - ☒ Keep Spouses Together
 - ☒ Line Up Generations
 - ☒ Conserve Left Space
 - ☒ Force Father Left
 - ☒ Redraw Pedigree
- Pedigree Dimensions**
- Smartdraw Options**
- Formats**

[Close]

- **Keep Spouses Together** – lines up spouses evenly next to each other.
- **Line Up Generations** – lines up individuals on the same generation horizontally.
- **Conserve Left Space** – moves the pedigree as far left on the pedigree canvas.
- **Force Father Left** – keeps the father of a relationship to the left of the mother.
- **Redraw Pedigree** – redraws the pedigree to best fit on the pedigree canvas.

Pedigree Settings [X]

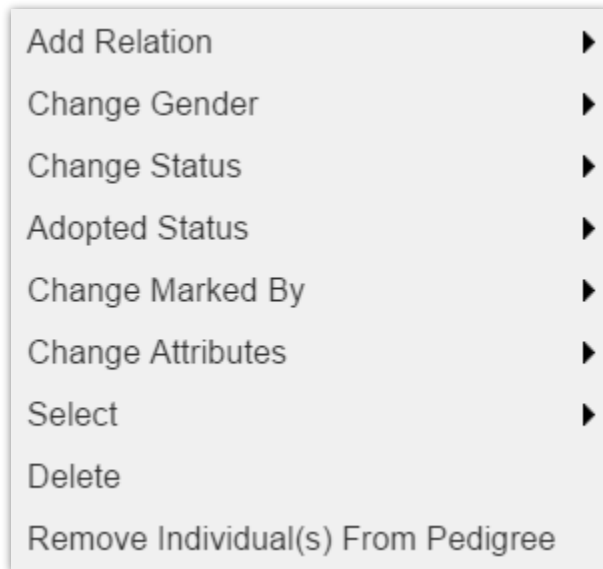
- Pedigree Display**
 - Symbols**: Cancer
 - Subtext**: Select format
 - Fields**: Select format
 - Markers**: Select format
- Pedigree Dimensions**
- Smartdraw Options**
- Formats**

[Close]

- **Formats** – select the different formats for the symbols, pedigree fields, markers, and subtext.

INDIVIDUAL MENU

Displayed by right-clicking on an Individual.



Add Relation – adds a relationship to the selected individual.

Change Gender – changes the gender of the selected individual.

Change Status – changes the vital status.

Adopted Status – changes the adopted status.

Change Marked By – adds a (*) (+) (-) symbol to the selected individual.

Change Attributes – additional options to change proband, no issues, infertile, SAB (spontaneous abortion), and enter a customized Icon Text.

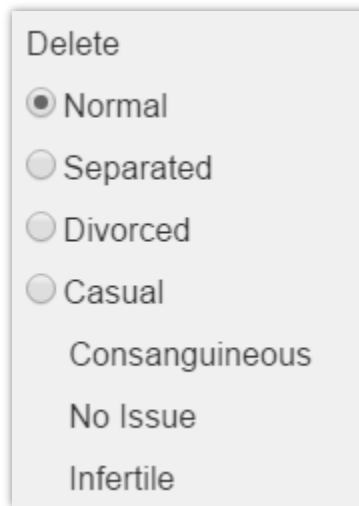
Select – selects the specified family relationship(s).

Delete – permanently deletes the individual from the database.

Remove Individual(s) From Pedigree – removes the individual from the pedigree and prompts which location to save the individual.

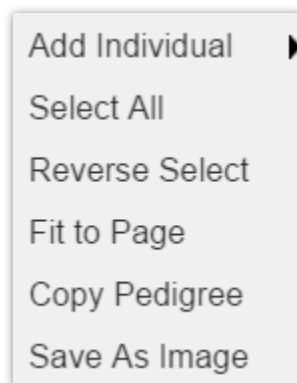
RELATIONSHIP LINE MENU

1. Select the relationship line between two individuals, you will see two yellow boxes on opposite sides of the line, connecting the two individuals
2. Right-click the selected line
3. Choose your menu option here



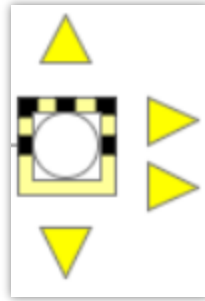
RIGHT-CLICK MENU

Right click with your mouse anywhere on the empty space of the Pedigree screen to open the right-click menu.



- **Add Individual** – adds a male or female to the pedigree.
- **Select All** – selects all individuals on the pedigree.
- **Reverse Select** – selects everyone that is not selected and de-select those that were selected.
- **Fit to Page** – fits the pedigree on the specified page orientation as well as paper size along with additional options for adjusting the margins.
- **Copy Pedigree** – allows copying of the pedigree to paste elsewhere.
- **Save As Image** – allows saving the pedigree as an image file.

ONE – CLICK ADD



Top arrow – left click to add a father and right click to add a mother.

Top right arrow – left click to add a brother, right click to add a sister, and hold ctrl and click to add a twin.

Bottom right arrow – left or right click to add a spouse.

Bottom arrow – left click to add a son and right click to add a daughter.

DATA FIELDS

Data Fields that are displayed on the Pedigree are also called Pedigree Drop Fields. These fields are Pedigree level and usually displays data about the pedigree. Pedigree Drop Fields are very dynamic and customizable.

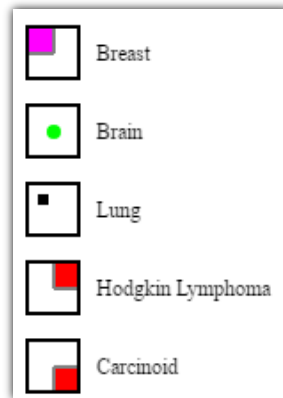
Custom Pedigree Header
10/31/16

Paternal Ancestry
Vietnamese

Maternal Ancestry
Czech

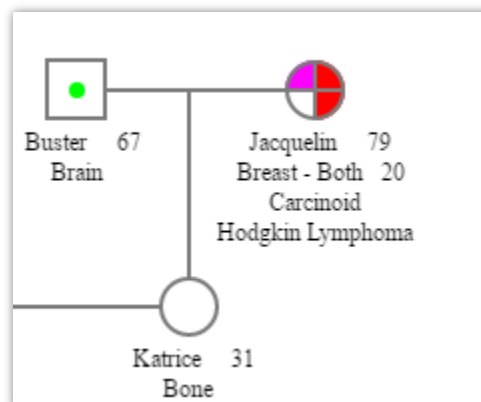
CANCER LEGEND

This legend auto populates as you add cancers and/or other disease that are predefined with custom Pedigree symbols. Pedigree symbols can be customized and used with various data fields to display symbols on the Pedigree. To add a cancer to an Individual, see Individual Datasheet for more details.



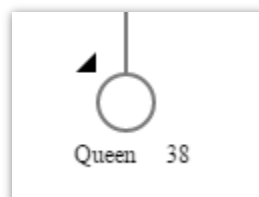
SUBTEXT

This text is found under each Individual and can be edited via the Individual Datasheet. Subtext can be customized to display data on the Pedigree from any fields within your Individual Datasheet.



PROBAND

Person serving as the starting point for the genetic study of a family is the Proband and is marked with a black arrow on the Pedigree.

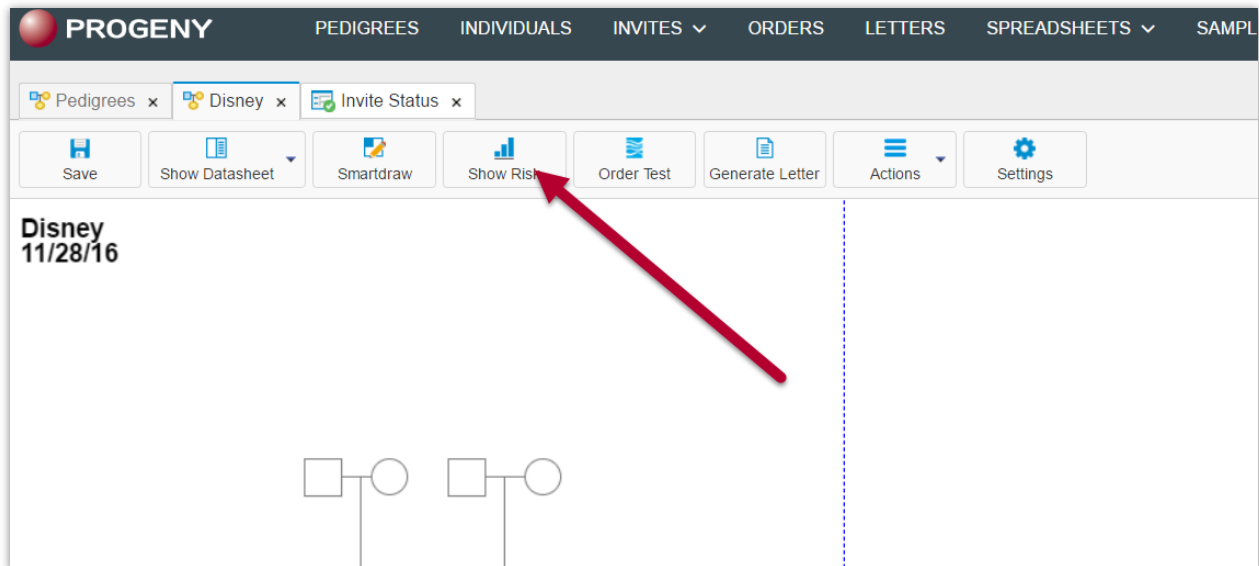


Cancer Risk Assessment

Did you know that you can run validated hereditary cancer risk assessment models at the touch of a button without re-entering data and generate custom queries and spreadsheets on this data?

Progeny Clinical includes validated risk assessment models to calculate 5-year and lifetime cancer risk, as well as gene mutation probabilities for any member of the pedigree. Any missing or invalid data required to run these models are automatically identified for you. Risk calculations can be easily saved and timestamped, or generated as a .pdf at any time.

First, Click Show Risk button on the Pedigree Toolbar to open the risk Models screen:



Risk Assessment Settings

Display the following risk assessment models:

☒ BRCAPro

☒ MelaPro

☒ MMRPro

☒ Tyrer-Cuzick

☒ PancPro

☒ Premm

☒ Gail

☒ Claus

Only models that have been configured can be chosen. [Configure Risk Models](#)

Risk Threshold:

% Cancer

% Mutation

Reporting:

☒ Display data inputs

☒ Do not show this dialog again

Cancel

Continue

- The available risk models include BRCAPro, MMRPro, PancPro, MelaPro, Tyrer-Cuzick, Premm, Gail, and Claus.
- **Risk Threshold** - specifies what risk calculation percent will be highlighted in red once that threshold is reached.
- **Display data inputs** – displays the data input in the PDF viewer for the results.
- **Do not show this dialog again** – specifies that the only way to reach the risk settings is by clicking the cog wheel.

RISK ASSESSMENT RESULTS

Validation Errors 1				Cancer Risk 8			Mutation Probabilities 15	
The following individuals include invalid data required to run selected risk models.								
ID#	FIRST NAME	LAST NAME	VALIDATION					
1	Russ		Missing Age Skin					
				BREAST	5YR	LIFE	BRCAPRO	%
				CLAUS	NA	NA	BRCA1	7.3%
				GAIL	1.5%	7.2%	BRCA2	0.4%
				BRCAPRO	2.4%	8.7%	ANY	7.7%
				TYRER-CUZICK	2.2%	10.5%	TYRER-CUZICK	
				OVARIAN			BRCA1	0.0%
				BRCAPRO	1.1%	3.9%	BRCA2	0.1%
				COLORECTAL			ANY	0.2%
				MMRPRO	0.4%	2.4%	MMRPRO	
				ENDOMETRIAL			MLH1	0.0%
				MMRPRO	0.4%	1.3%	MSH2	0.0%
				MELANOMA			MSH6	0.0%
				MELAPRO	Validation Error		ANY	0.1%
				PANCREATIC			MELAPRO	Validation Error
				PANCPRO	0.1%	1.0%	PANCPRO	
							ANY	0.6%
							PREMM	
							MLH1	0.3%
							MSH2	0.3%
							MSH6	0.3%
							ANY	1.0%

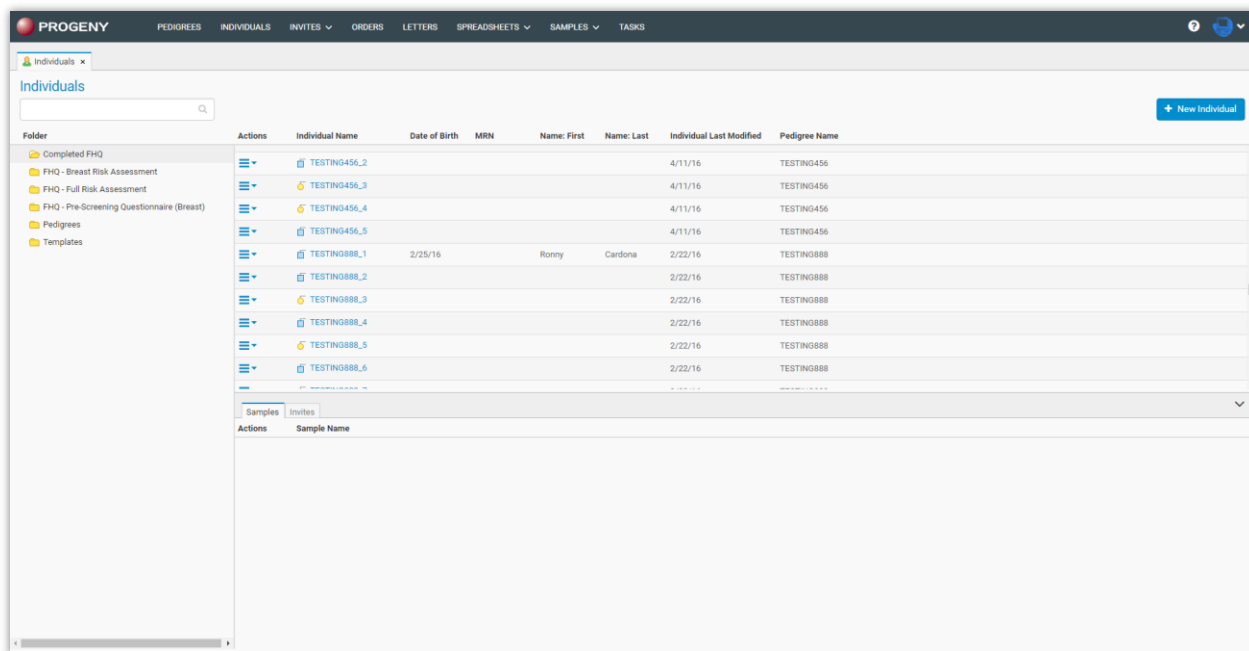
Validation Errors – Show if you have bad or missing data in the cancer table. Displayed in red on the Cancer Risk and/or Mutation Probabilities (Ex: missing age at breast cancer)

Cancer Risk – 5 year and Life

Mutation Probabilities – All mutation probabilities are displayed here.

Individual Dashboard

An individual is a single, distinct entity for which data is collected according to an approved protocol. Managing individuals in Progeny Clinical consists of creating, copying, moving, and deleting individuals, and modifying the individual datasheet.



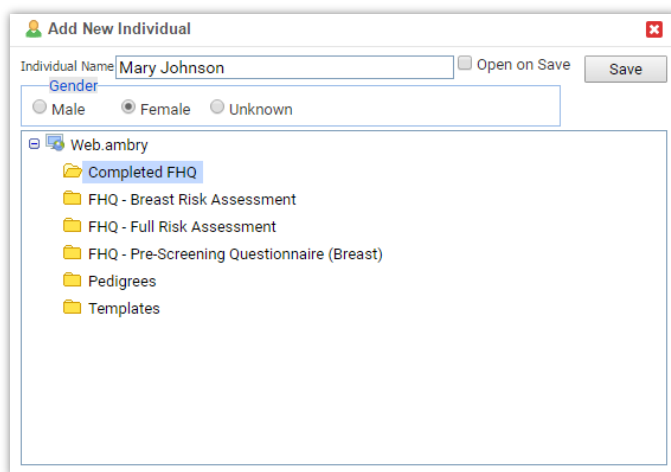
Creating Individuals

To add individuals to your database without attaching them to a pedigree, select the Individuals module from the Navigation Bar. An individual who is not contained in a pedigree is referred to as a singlet. After creating a singlet, the singlet can be moved to an existing pedigree or to a new pedigree.

On the Individuals dashboard, click the + New Individual button.

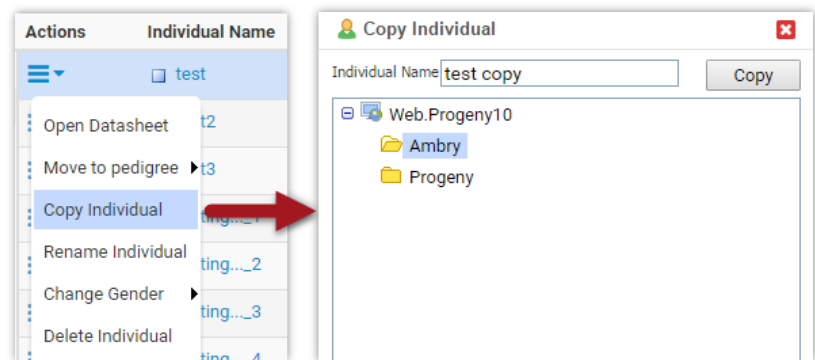


The Add New Individual dialogue box opens. Enter the name for the new individual, select the gender for the individual, then select the data folder to which the individual is being added. A message indicates the individual was successfully created.



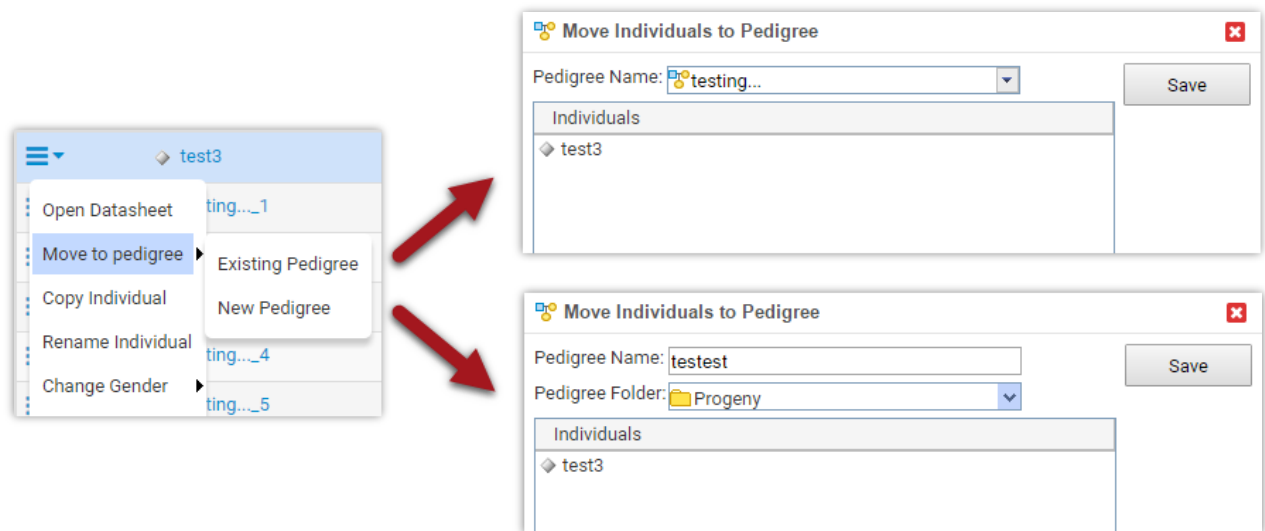
Copying Individuals

Users can copy an individual between data. Copying an individual leaves the original individual in its original data folder while putting a copy (or duplicate) of the individual in the new destination folder. Any edits made to the copied individual are not reflected in the original individual.



Moving Singlets to Pedigrees

Users can move a singlet to a new or existing pedigree. Moving a singlet to an existing pedigree moves the singlet from its original data folder to the destination folder of the pedigree. Moving a singlet to a new pedigree allows the user create a new pedigree in a specific folder with that individual as the proband.



Deleting Individuals

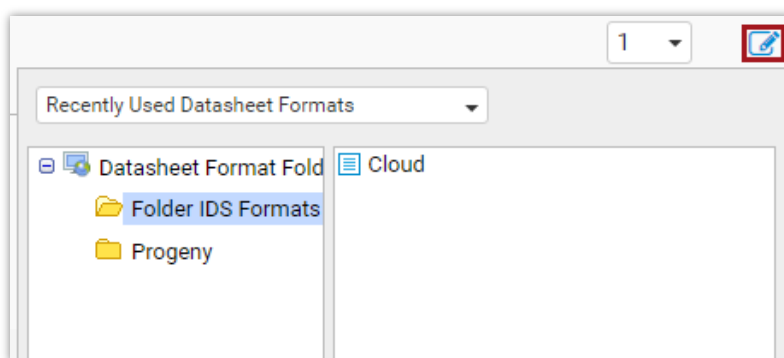
Only singlets are able to be deleted from the Individuals Dashboard. Click on the Actions menu next to the singlet and select Delete Individual. To delete an individual in a pedigree, navigate to the Pedigree Screen by selecting Open Pedigree in the Actions menu next to the individual. Right-click on the icon of the individual to be deleted and select Delete. A message appears asking if you are sure you wish to delete the selected individual. Click Yes. The individual is then deleted.

Individual Datasheet Screen

The individual datasheet is used to enter and store information about individuals in the Progeny database. An Individual datasheet can contain individual database fields, pedigree database fields, and marker database fields. Datasheets are built from within the Progeny Desktop (Fat) client then saved as a format (similar to a template). This format can now be applied to other individuals or folders within Progeny.

Applying Individual Datasheet Formats

Click an individual in the Individuals module or double click an individual in a pedigree. The datasheet opens up. In the upper right corner of that window is a blue icon that looks like a pencil and paper. Select the containing folder then the desired format. Once selected the individual datasheet opens up this format.



Data Field Types

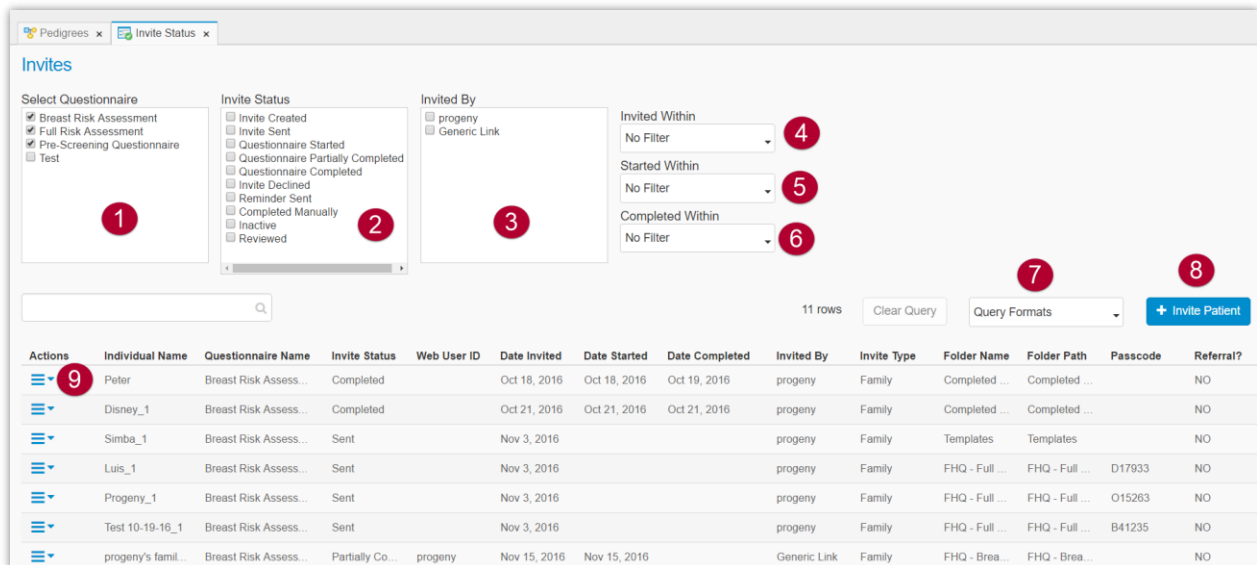
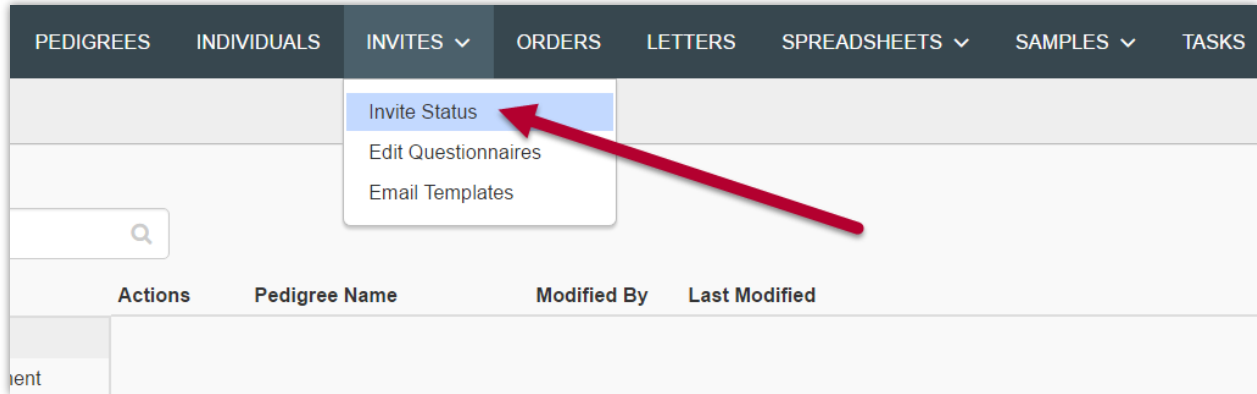
Progeny Web client does not allow users to create, modify, or delete database fields. Configuring fields is an administrator function that must be managed in the Progeny Desktop client by a Progeny

administrator. When an administrator creates a database field in the Progeny Desktop Client a field type is specified. The field type determines the type of data that a user can enter into the field (text, numeric, date, etc.) or determines how the field functions in the database. The table below lists the field types that are available in a Progeny database, the icon used to represent the field type, and a description of each field.

Field Type	Description
Text	Alphanumeric characters (all digits and printable characters) up to a maximum of 32,000 characters.
Date	M/D/YY or M/D/YYYY
Numeric	The digits 0-9. Negative numbers and decimals allowed.
Yes/No	Checkbox field that holds a value of either 1 (to indicate Yes) or 0 (to indicate No).
Dropdown	Displays a list of pre-defined list of items from which the user can select one item.
Image	Allows for the display of an image in an allowed format in the field.
Table	The field is to be included in a table. The field does not have a pre-defined value.
Lookup Table	The field is to be included in a table. The fields have pre-defined values.
Computed	No data entry is allowed in this field. Instead, a non-editable value is displayed in the field. The value that is displayed is automatically calculated based on the expression, function, or constant assigned to the field or values that are contained in other fields.
Summary	Provides summary information for a given column on a per pedigree basis. The summary can be an average, a total count, a minimum value, a maximum value, or a sum total.
Table Summary	A computed field that summarizes the data for a given column in a given table.
Hyperlink	Links to an external document, website, and so on.

Invites – Family History Questionnaire

Invite Status



1. SELECT QUESTIONNAIRE
2. INVITE STATUS
3. INVITED BY
4. INVITED WITHIN
5. STARTED WITHIN
6. COMPLETED WITHIN
7. QUERY FORMATS
8. INVITE PATIENT

9. ACTIONS MENU

1. SELECT QUESTIONNAIRE

Here you select the questionnaire(s) to view all invitations for the selected questionnaire(s) in the view pane at the bottom of the page.

2. INVITE STATUS

You can sort the view of invitations to view invitations with the specified status.

Invite Created – the invitation has been created successfully.

Invite Sent – the invitation has been sent successfully.

Questionnaire Started – the questionnaire link, either through email or generic link, has been clicked to link to the questionnaire login/new user page.

Questionnaire Partially Completed – the questionnaire has been started and the user has clicked on the 'Save, Finish Later' button in the questionnaire.

Questionnaire Completed – the questionnaire has been completed.

Invite Declined – when the terms of use has not been accepted or the consent page has been set for your questionnaire.

Reminder Sent – a reminder has been sent.

Completed Manually – an invite status was set to 'Completed Manually'.

Inactive - an invite status was set to 'Inactive'.

Reviewed - an invite status was set to 'Reviewed'.

3. INVITED BY

Here you can sort the view of the invitations based on a specific user that sent the invitation.

4. INVITED WITHIN

You can filter the view of invitations by the amount of weeks/days that the patient was invited within.

5. STARTED WITHIN

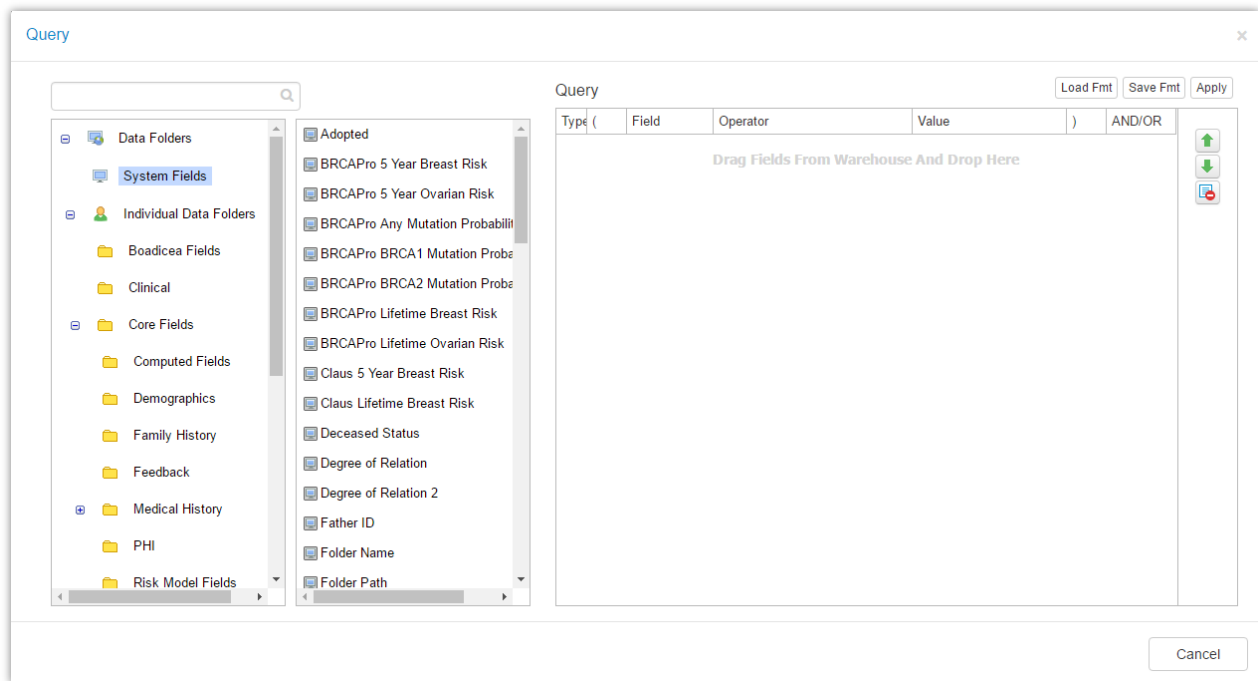
You can filter the view of invitations by the amount of weeks/days that the questionnaire was started within.

6. COMPLETED WITHIN

You can filter the view of invitations by the amount of weeks/days that the questionnaire was completed within.

7. QUERY FORMATS

You can filter the view of the invitations even further by selecting the Query Formats drop-down and selecting to either load a saved query format or create a new query.



You are able to select any field in the database by using the folders on the left pane and then drag to drop the field into the right Query pane. Once you have the field in the Query pane, you can then specify the operator and value. This Query pane allows the creations of complex queries which can include multiple fields with different values as well as using 'AND/OR' to specify multiple conditions.

	(	Name: First	equals	Bob	OR
		Name: Last	equals	Jackson	) AND
		Date of Birth	is less than	Dec 5, 1985	

Once you are completed with specifying the query filter, you can then choose to save the format which will then open another window asking to select the folder to save the format in, give the format a name, delete a format from the selected folder, delete the selected format folder if it is empty, and optionally, give the format a description. After the format is saved, you can then click Apply to run the query to filter the invitations view.

Spreadsheet Format

Enter New Format Name

Enter New Format Description

Save

New Folder...

Delete Folder

Delete Format

Web.10Cloud

Progeny

Format Name	Description
-------------	-------------

8. INVITE PATIENT

Here you can click to invite a patient to fill out the FHQ. The first step would be to select which questionnaire to send to the patient.

Invite Patient to the Questionnaire

×

Select a Questionnaire you want to invite patients to

Questionnaire Name	Datasheet Format Name	E-mail Template Name
 Breast Risk Assessment	Breast Risk Assessment	Invite Email
 Full Risk Assessment	Full Risk Assessment	Invite Email
 Pre-Screening Questionnaire	Pre-Screening (Breast)	Invite Email

Cancel

Previous

Next

Invite Patient to the Questionnaire

×

Who would you like to invite?

New Patient

☐ New Patient

Existing patient or relative

☐ Individual

☐ Members of one family

☐ Patients who meet specific criteria

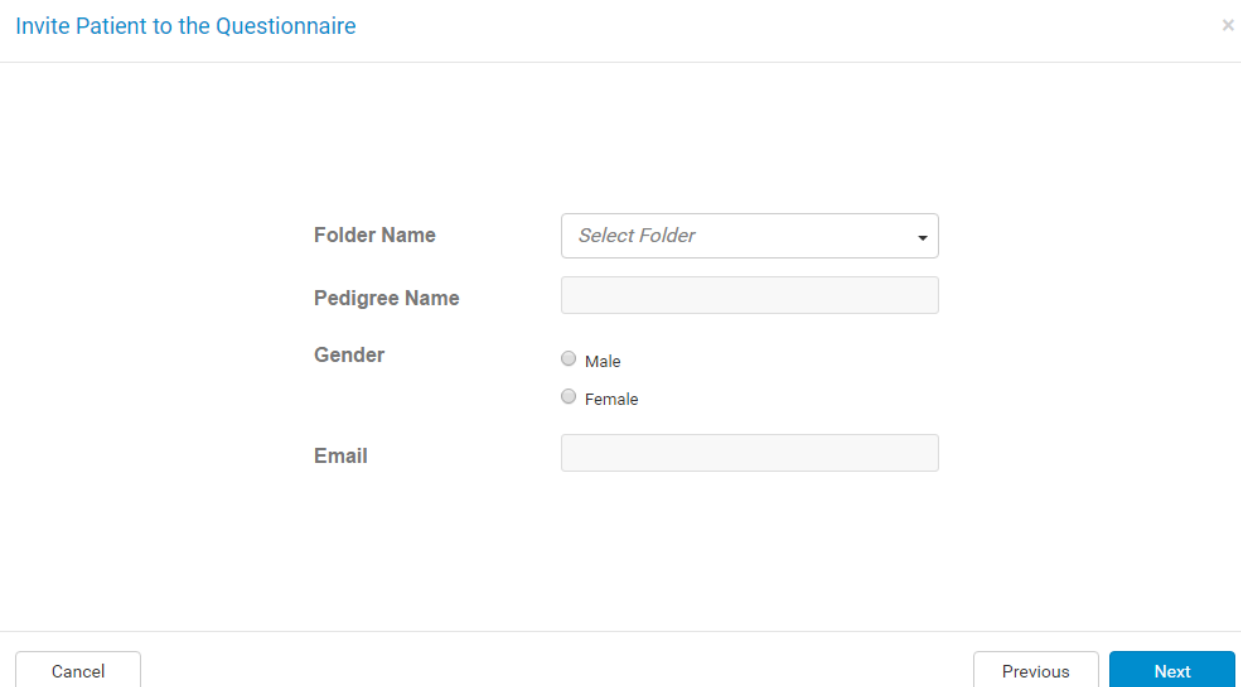
Cancel

Previous

Next

Invite new Patient – invites a new patient that is not in the Progeny database.

You will then be asked which folder to save the pedigree in, the name of the pedigree, the gender of the proband, and the email to send the questionnaire to.



The screenshot shows a dialog box titled "Invite Patient to the Questionnaire" with a close button (X) in the top right corner. The dialog contains four input fields: "Folder Name" with a dropdown menu showing "Select Folder", "Pedigree Name" with a text input field, "Gender" with two radio buttons labeled "Male" and "Female", and "Email" with a text input field. At the bottom, there are three buttons: "Cancel", "Previous", and "Next".

Invite Existing Patient or Relative – invites a patient or relative that is already in the database.

Once you select the questionnaire to send, you will then have to select either an individual, members of one family, or patients who meet specific criteria.

Individual – an individual in the database that is not part of a pedigree, also called a singlet.

Invite Patient to the Questionnaire

×

Select Individuals To Invite

Search for Individual

Individual Name

First Name

Last Name

Phone Number

Email

Pass Code

Peter Pan

Peter

Pan

Tarzan

1-2 of 2

Cancel

Previous

Next

Members of one family – here you can select a member of a family to be invited.

Invite Patient to the Questionnaire

×

What is the Name of the Existing Pedigree From Which To Invite Individuals?

Search for Pedigrees

Pedigree Name

Modified By

Last Modified

Roar

progeny

Nov 7, 2016 2:06:26 F

Risk Test

progeny

Dec 13, 2016 4:09:59

Test

progeny

Dec 9, 2016 9:21:28 A

Ryan

progeny

Dec 14, 2016 11:15:3

Guerrero Family

progeny

Dec 9, 2016 4:48:35 F

Ptest

progeny

Dec 15, 2016 8:26:24

Cancel

Previous

Next

Patients who meet specific criteria – here you can filter the database by the specified query so that you can invite patients that meet the criteria in the query. You would first select the query format, then make changes to the query, if necessary, which will then display all individuals that matches the query where you can select the one(s) to invite to the questionnaire.

Invite Patient to the Questionnaire

Select existing query format you wish to use to search for Individuals or click Next to create a new query

Search for Spreadsheets

Web.10Cloud

Progeny

Format Name	Description
Birth	Date of Birth

Cancel

Previous

Next

At the end of inviting a patient, you can then edit the email before it is sent to the customer. Here you can make last minute changes to the template before it is sent. Note that this will not overwrite the saved Invite Template.

Lock Invite – locks the invitation so that it cannot be accessed.

View Invite History – shows a history log of the invites status.

Open Pedigree – opens the pedigree for the individual.

Open Datasheet – opens the datasheet for the individual.

Generate Letter – generates a letter for the individual.

Edit Questionnaires

On this tab, you can edit the configuration for the different questionnaires inside of Progeny.

1. Save 2. New Questionnaire 3. Delete Questionnaire 4. Copy Questionnaire

Questionnaire Name	Datasheet Format Name	E-mail Template Name
Breast Risk Assessment	Breast Risk Assessment	Invite Email
Full Risk Assessment	Full Risk Assessment	Invite Email
Pre-Screening Questionnaire	Pre-Screening (Breast)	Invite Email

5. General settings 6. Email Settings 7. Status Actions 8. Login Screen 9. Profile Page 10. Consent Page 11. Datasheet 12. Family Builder 13. Additional Family 14. Family Table 15. Final Notes 16. Summary Page 17. Relatives Invites 18. Submit Page

Questionnaire Name: Full Risk Assessment Questionnaire Type: ☐ Individual ☒ Family

Questionnaire Language: English - United States Make passcode protected: ☒

Configuration Folder: FHQ - Full Risk Assessment Make Gender Required: ☒

Generic Link: https://localhost:8443/FHQ?genlink=HJwxFZk_IUFEglbXYsjLlbpwBvJJBS8V5bvKvmO9w%3D

Help text:
Text HTML
B I U X₂ X²
Background Foreground Font Size
If you have questions about how to answer your family history questionnaire, please use the contact information to contact Support. Please note that support for the Family History Questionnaire is only available during normal business hours (8am-4pm EST).
Phone: (800)776-4369
Email: support@progenygenetics.com

1. SAVE

2. NEW QUESTIONNAIRE

3. DELETE QUESTIONNAIRE

4. COPY QUESTIONNAIRE

5. GENERAL SETTINGS

6. EMAIL SETTINGS

7. STATUS ACTIONS

8. LOGIN SCREEN

9. PROFILE PAGE

10. CONSENT PAGE

- 11. DATASHEET**
- 12. FAMILY BUILDER**
- 13. ADDITIONAL FAMILY**
- 14. FAMILY TABLE**
- 15. FINAL NOTES**
- 16. SUMMARY PAGE**
- 17. RELATIVES INVITES**
- 18. SUBMIT PAGE**

1. SAVE

Saves any changes that are made to the questionnaire(s).

2. NEW QUESTIONNAIRE

Creates a new questionnaire that can be customized.

3. DELETE QUESTIONNAIRE

Deletes the selected questionnaire.

4. COPY QUESTIONNAIRE

Copies the selected questionnaire and all its settings to a new questionnaire.

5. GENERAL SETTINGS

Questionnaire Name – The name for the questionnaire.

Questionnaire Type – Individual questionnaires ask about the individual while family questionnaires ask about the family.

Questionnaire Language – the language for the questionnaire.

Make passcode protected – enables a second factor for authentication in which a passcode is generated for the FHQ and has to be given to each patient that is sent the questionnaire so that they can begin.

Configuration Folder – the folder that is configured with the specified FHQ.

Make Gender Required – makes the gender field required for the questionnaire when being filled out.

Generic Link – link that is automatically created so that the FHQ can be opened using the URL in a browser.

Help Text – help text that will be displayed when patients click the ‘Help’ button throughout the questionnaire.

6. EMAIL SETTINGS

Invitation Email – the invitation email template.

Submit Email – the submit email template.

Unfinished Email – the unfinished email template.

Reminder Email – the reminder email template.

Turn on Automated Reminders – enables the option to set up automated reminders.

Remind Every – you can choose to send a reminder for the specified days/weeks.

Max Number of Reminders to Send – you can specify the maximum amount of reminders that can be automatically send.

Remind Once – you can choose to send a reminder once for the specified days/weeks.

Before This Date – you can specify a field in the database that points to a date so that the Remind Once function can be applied before the date field.

7. STATUS ACTIONS

This section covers actions that take place once an invitation has the status manually set to 'Reviewed'

Send Email – sends the specified email template.

Who to Email – specified to whom the email template will be sent to.

- **Patient** – sends the email template to the patient.
- **Staff** – sends the email template to the email that is specified in 'Email to notify' from the Web Data Capture Configuration in the Progeny web configuration back-end.
- **Both** – sends the email template to both the patient and the staff.

Move To Folder – moves the pedigree/individual to the specified folder.

Transmit Pedigree PDF to EMR – if an EMR has been set up with your database, this enables the pedigree to be transmitted to the EMR.

8. LOGIN SCREEN

Login Page Title – the title for the login page.

Login Page Instructions – instructions for the login page.

Sign Up Page Instructions – instructions for the sign up page.

9. PROFILE PAGE

Add Profile Page – specifies if the profile page will be added to the questionnaire.

Profile Page Title – the title for the profile page.

Datasheet Format Name – the datasheet format for the profile page.

10. CONSENT PAGE

Add Consent Page – specifies if the consent page will be added to the questionnaire.

Consent Page Title – the title for the consent page.

Datasheet Format Name – the datasheet format for the consent page.

11. DATASHEET

Datasheet Page Title – the title for the datasheet of the questionnaire.

Datasheet Format Name – the datasheet format for the questionnaire.

Disable datasheet styles – disables the styles that are configured for the specified datasheet. You can specify which format to use for the Editor Style, Editor Label Style, and Added Text Style.

12. FAMILY BUILDER

Family Builder Page Title – the title for the family builder page.

Family Builder Page Instructions – instructions for the Family Builder Page.

Show Only When Conditions Below is True – you can specify to show the family builder page by the condition that is specified.

13. ADDITIONAL FAMILY

Add Nieces and Nephews Page – specifies if the niece and nephew page will be added to the questionnaire.

Nieces and Nephews Page title – the title for the Nieces and Nephews Page.

Nieces and Nephews Page Instructions - instructions for the Nieces and Nephews page.

Add Cousins Page – specifies if the Cousins Page will be added to the questionnaire.

Cousins Page title – the title for the Cousins page.

Cousins Page Instructions - instructions for the Cousins Page.

Add Half-Siblings Page – specifies if the Half-Siblings page will be added to the questionnaire.

Half-Siblings Page title – the title for the Half-Siblings page.

Half-Siblings Page Instructions – instructions for the Half-Siblings Page.

14. FAMILY TABLE

Family Table Page title – the title for the Family Table page.

Family Table Instructions – the instructions for the Family Table page.

15. FINAL NOTES

Add Final Notes Page – specifies if the Final Notes page will be added to the questionnaire.

Final Notes Page title – the title for the Final Notes page.

Page Instructions – the instructions for the Final Notes page.

16. SUMMARY PAGE

Show pedigree upon completion – specifies whether to show the pedigree on the summary page and whether to display it for all members who fill out the questionnaire or only the Proband of the family.

Show data editors – specify if the data editors are shown on the summary page. These editors enables changing information on the summary page.

Summary Page title- the title for the Summary page.

Summary Page Instructions – the instructions for the Summary page.

Empty Summary Page title – the title for the Empty Summary Page.

Empty Summary Page Instructions – the instructions for the empty Summary page. This page will be displayed if the patient does not agree to the terms of use page.

17. RELATIVES INVITES

Add Family Invites Page – specifies if the Family Invites page will be added to the questionnaire.

Invites Page title – the title for the Invites page.

Invites Page Instructions – the instructions for the Invites page.

Add phone number column – adds a phone number column.

Send email invite immediately – send the invite immediately.

Use email template – uses the specified email template for relatives.

Invite to Questionnaire – specifies the questionnaire to be sent for the relatives.

18. SUBMIT PAGE

Submit Page Title – the title for the Submit page.

Submit Page instructions – the instructions for the submit page.

Lock on submit – locks the questionnaires once they have been submitted. This prevents accessing the questionnaire again and changing information.

Move on submit – moves the pedigree to the target folder once a questionnaire has been submitted.

Email Templates

This is where all the email templates are saved.

PROGENY PEDIGREES INDIVIDUALS INVITES ▾ ORDERS LETTERS SPREADSHEETS ▾ SAMPLES ▾ TASKS

Pedigrees x Email Templates x

Save New Template Delete

Template Name	Subject	Body	Modified
☒ Invite Email	Family History Questionnaire	Family History Questionnaire InvitationDear (NAME),Schedule HerePlease take a few minutes to fill out	2015-10-20
☒ Reminder Email	Family History Questionnaire Rem	Dear (NAME),This is a reminder that you have not completed your Family History Questionnaire. When	2015-10-20
☒ Submit Email	Family History Questionnaire Sub	Family History Questionnaire CompletionCongratulations!You have successfully completed your Family	2015-10-20
☒ Unfinished Email	Family History Questionnaire	Family History Questionnaire ContinuationDear (NAME),Thank you for starting your Family History Que	2015-10-20

Template Name

Email Subject

Body

Text HTML

B I U X² x³ [Align Left] [Align Center] [Align Right] [Justify] [List Bulleted] [List Numbered] [Link] [Unlink] [Color] [Background Color] [Font Size]

Foreground Background Font Size



Dear (NAME)

[Schedule Here](#)

Please take a few minutes to fill out our online Family History Questionnaire (FHQ). The FHQ will ask you about your personal and family history of cancer. It may help to talk with family members to gather information about their cancer diagnoses, types of cancer, ages of diagnosis etc. Once you start the questionnaire, you will be able to save it and come back later if needed. Please fill out the information the best that you can.

[Click here to begin your Online Family History Questionnaire](#)

If you have any questions, please contact us at:

Locked (RB Approved)

Each email template can be customized with the Template Name, Email Subject, and the email Body. There are four templates that are included with the FHQ and are listed below:

Invitation Email – the template that is used for sending invitations.

Submit Email – the template that is used when questionnaires are submitted by patients.

Unfinished Email – the template that is used when a questionnaire has not been completed.

Reminder Email – the template that is used when a reminder has been manually sent for a questionnaire.

There are also additional options on the top of the Email Templates page.

Save – saves any changes made to any of the email templates.

New Template – creates a new email template.

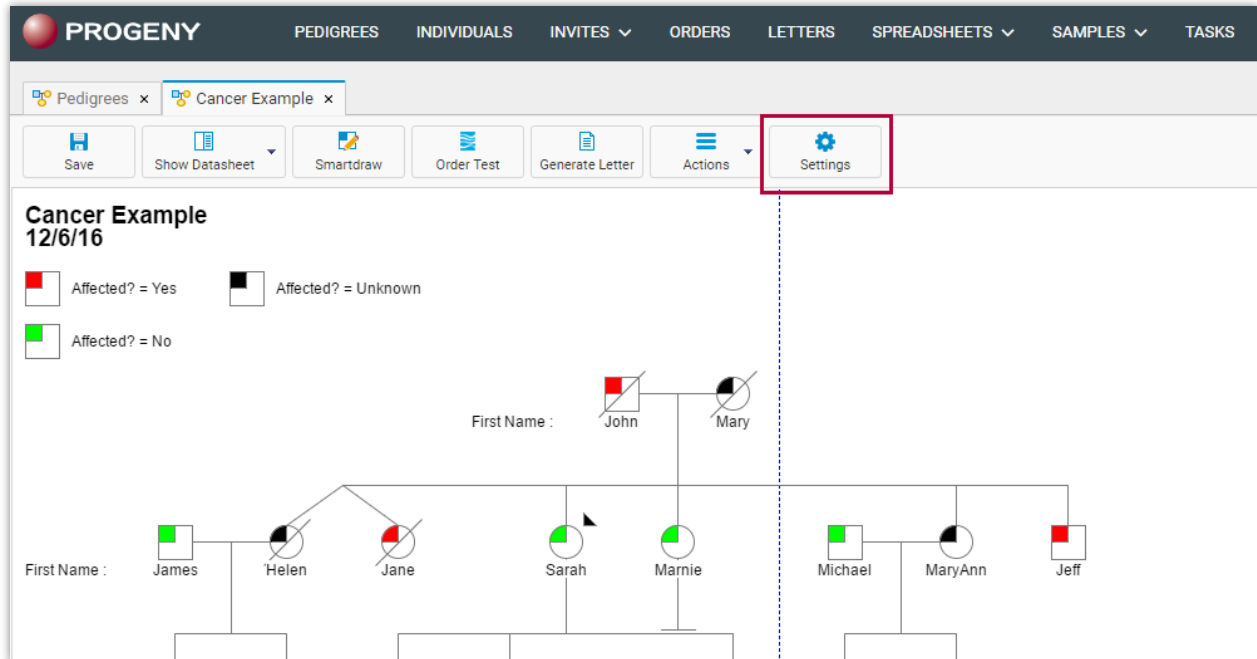
Delete – deletes an email template.

Formats

After an administrator has configured the necessary templates for datasheets, subtext, and icons, each configuration can be saved as an individual format. Retrieve this saved format by selecting it in the following ways:

Pedigrees

From the Pedigree canvas, select Settings.



Then select Formats in the window that opens up.

The image shows a 'Pedigree Settings' dialog box with a sidebar on the left and a main content area on the right. The sidebar contains four items: 'Pedigree Display', 'Pedigree Dimensions', 'Smartdraw Options', and 'Formats'. The 'Formats' item is highlighted with a red rectangular box. The main content area has four dropdown menus arranged in a 2x2 grid. Each dropdown menu has a red circle with a white number next to it. The top-left dropdown is labeled 'Symbols' and has 'Cardiovascular Pedigrees' selected, with a red circle containing the number '1' next to it. The top-right dropdown is labeled 'Subtext' and also has 'Cardiovascular Pedigrees' selected, with a red circle containing the number '2' next to it. The bottom-left dropdown is labeled 'Fields' and has 'Select format' selected, with a red circle containing the number '3' next to it. The bottom-right dropdown is labeled 'Markers' and also has 'Select format' selected, with a red circle containing the number '4' next to it. A 'Close' button is located in the bottom right corner of the dialog box.

Pedigree Settings

Pedigree Display

Pedigree Dimensions

Smartdraw Options

Formats

Symbols

Cardiovascular Pedigrees 1

Subtext

Cardiovascular Pedigrees 2

Fields

Select format 3

Markers

Select format 4

Close

The types of available formats are:

- 1) Symbols to select types of icons that appear.
- 2) Text that appears below the individuals in the pedigree.
- 3) Show certain fields on the pedigree canvas itself.
- 4) Select which genotype marker formats are used.

Individuals

Select the pen and pad at the top right.

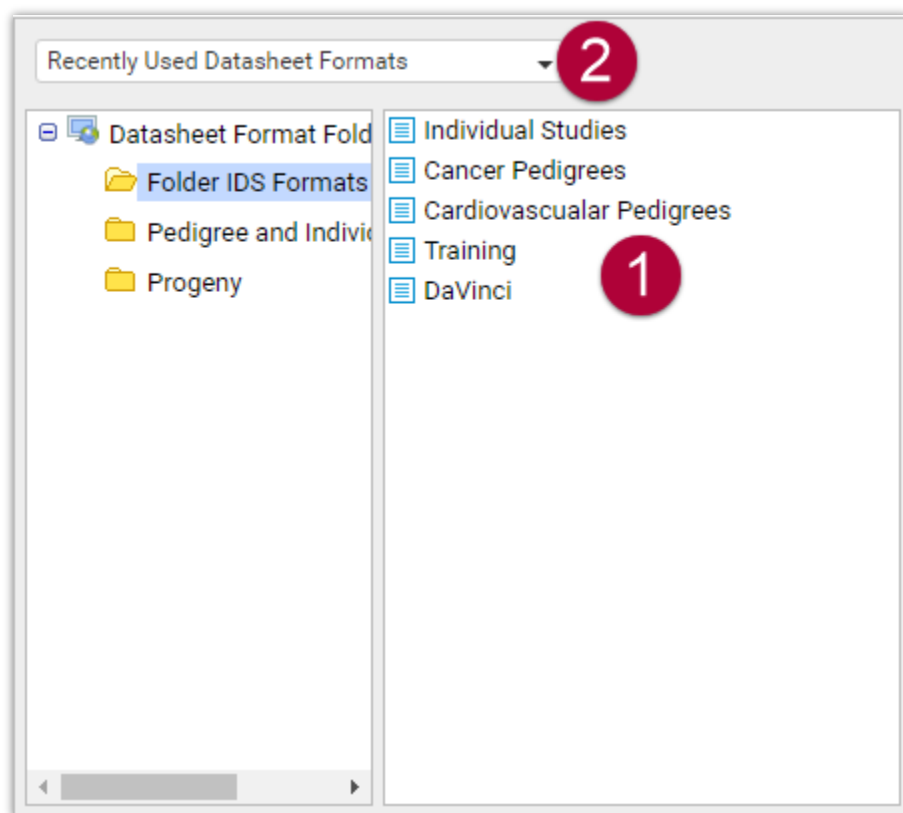
4 ▾



Consent Status

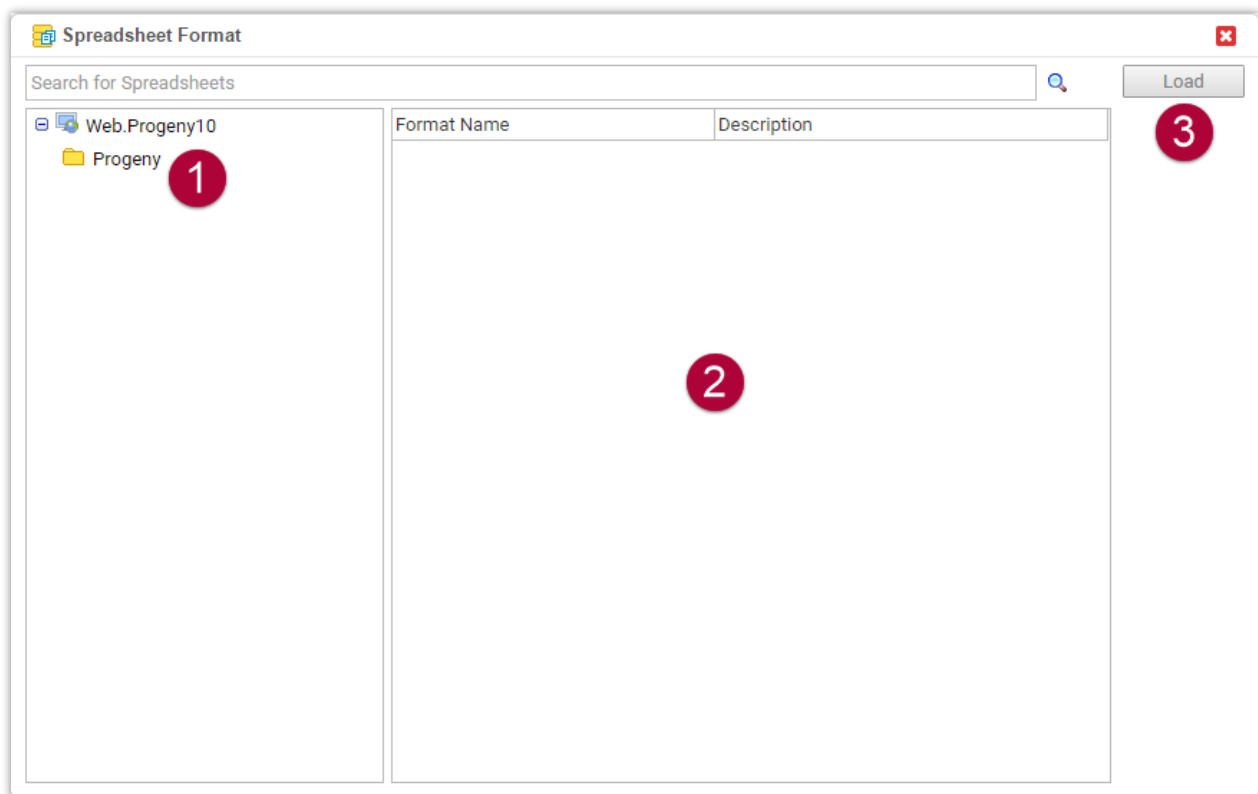
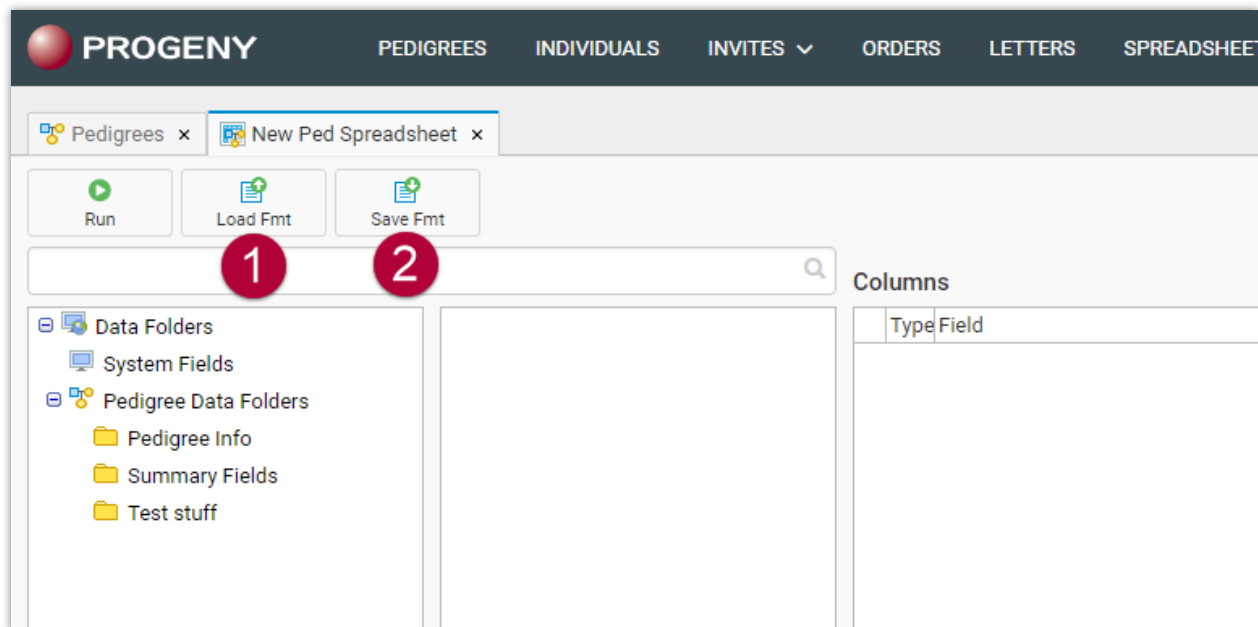
Consent Form Received?	Yes
Medical Release Received?	No
Contact Status?	OK

Select the folder containing the format you want for the datasheet from section 1.
Select recently used formats from section 2.



Spreadsheets

While creating a new Spreadsheet you can either save or load a format by selecting Load or Save format at the top.



Select the folder containing the Format you wish to use in section 1, select the Format in section 2, and then select load in section 3.

Orders

Progeny has integrated the ability to order genetic tests from Ambry Genetics through Ambry Port 2.0 (AP2). Through Progeny, web users can:

- complete an insurance Pre-Verification form
- order genetic tests
- check the status of orders
- view the genetic test results report
- save the genetic test results report as a file on your computer

This eliminates the necessity to switch to another application for these tasks.

Registering

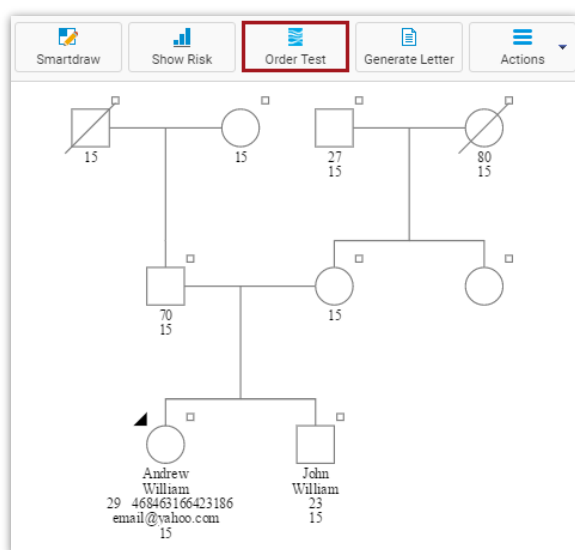
To be able to use the order feature, clinicians need to complete a brief registration form at <http://www.progenygenetics.com/support/ambryorder>, shown below:

Within a day you will receive credentials for ordering genetic tests from within Progeny.

Please contact Progeny Support at support@progenygenetics.com for assistance inputting your credentials into Progeny.

Ordering Genetic Tests

After you have received and inputted your AP2 credentials, you are ready to place genetic test orders. Just select an individual on the pedigree you want to order a test for and click the **Order Test** button.



Undo Redo Print **Order Test** Generate Letter

Patient Info Medical History Cancer History Testing Patient Entered Date

Patient ID William, A 468463166423186 Relationship to Proband Proband Individual Last Name 12/7/16

Name: First Andrew Date of Birth 4/7/87
Middle Name Est Age/Age at Death
Name: Last William Date of Death
Suffix Current Age/Age at Death 29
MRN 468463166423186 Cause of Death

Address Address
City City State MH Zip Code 11111
Email Address email@yahoo.com
Phone - Preferred Cell/Alt Phone Number

The selected individual's information will be populated into the mapped fields and a current view of the pedigree, which will accompany the **Test Request Form (TRF)**, will be displayed.

Order Test - Patient Confirmation

You have selected to order tests for the individual highlighted in yellow below. Verify your data before proceeding. By continuing, you will be leaving the Progeny application and going to a secure web-based application operated by Ambry Genetics for the purpose of ordering laboratory services for the individual you have identified. Please note that only the data shown below will be transferred to Ambry Genetics for purposes of treatment, payment and health care operations.

*Organization

*First Name

*Last Name

*Date of Birth

Phone

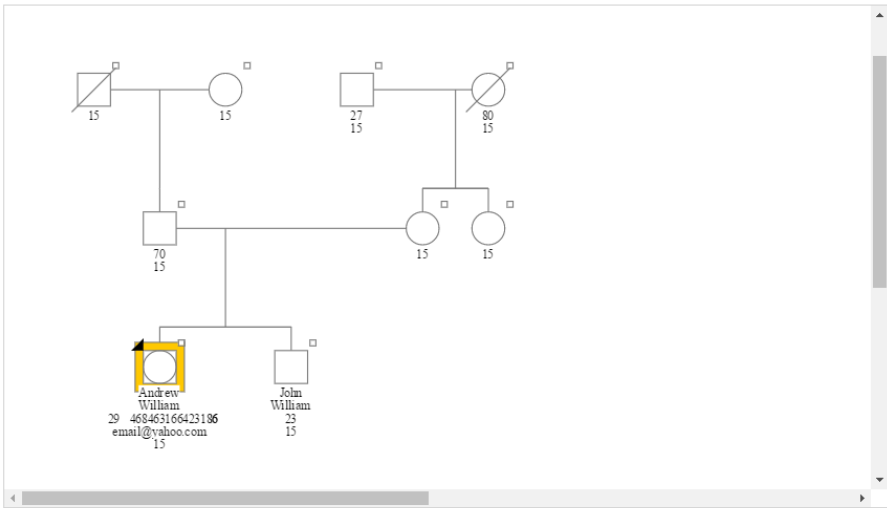
Address

City

State

Postal Code

Editing the information above will update the corresponding data fields within Progeny.
Click below to modify mapped fields.



Ambry Genetics

In order to assist in expediting insurance processing, click the **Continue with Preverification** button and complete the requested information. The status of benefits will be verified by Ambry Insurance Verification Department for all insurance samples before processing. Otherwise click the **Continue with Order** button to complete the **Test Request Form (TRF)**. Validation requisites will be displayed in the left column of the TRF.

Order Status

After you have placed an order you may check its status and, when completed, view its results on the **Orders** screen by clicking on the **Orders** module on the top navigation bar.

Actions	Order ID	Accession #	Patient	DOB	Panel	Test	Organization Name	Status	Submission Date	Results
	P403224		Andrew William	04/07/1987	5862	BRCA1 del/dup	PROGENY TEST ORG 1 (17245)	SUBMITTED	12/07/2016	
	P198413		Sean John	02/10/2016	8822	ColoNext	PROGENY TEST ORG 1 (17245)	SUBMITTED	08/16/2016	
	P198413		Sean John	02/10/2016	8838	BRCA1/2 seq a...	PROGENY TEST ORG 1 (17245)	SUBMITTED	08/16/2016	
	P234555		John Smith	03/09/2016	1048	HBB seq and d...	PROGENY TEST ORG 1 (17245)	SUBMITTED	06/24/2016	
	P234046		Test Test	01/01/1971	5862	BRCA1 del/dup	PROGENY TEST ORG 1 (17245)	SUBMITTED	06/23/2016	
	P234058		Test Test	05/31/2016	8838	BRCA1/2 seq a...	PROGENY TEST ORG 1 (17245)	SUBMITTED	06/23/2016	
	P198549		Jamie LHeureux	03/09/1980	8836	BRCPlus	PROGENY TEST ORG 1 (17245)	REPORTED	06/20/2016	
	P231736		Guy Test	06/01/2016	5862	BRCA1 del/dup	PROGENY TEST ORG 1 (17245)	SUBMITTED	06/16/2016	
	P229879		Test3 Test3	06/16/2016	5896	BRCA1/2 seq	PROGENY TEST ORG 1 (17245)	REPORTED	06/10/2016	
	P227182		Test Test	06/16/2016	1048	HBB seq and d...	PROGENY TEST ORG 1 (17245)	SUBMITTED	06/02/2016	
	P225708		Scar Lion	06/14/1945	1048	HBB seq and d...	PROGENY TEST ORG 1 (17245)	SUBMITTED	05/27/2016	

Smart Search

Searches only the data that is displayed in the columns in your smart list (Smart List details). The search is limited to the exact order of the characters in the string. The asterisk (*) is a wildcard that can be used to extend the search.

Actions	Order ID	Accession #	Patient	DOB	Panel	Test
	P403224		Andrew William	04/07/1987	5862	BRCA1 del/dup
	P198413		Sean John	02/10/2016	8822	ColoNext
	P198413		Sean John	02/10/2016	8838	BRCA1/2 seq a...
	P234555		John Smith	03/09/2016	1048	HBB seq and d...
	P234046		Test Test	01/01/1971	5862	BRCA1 del/dup
	P234058		Test Test	05/31/2016	8838	BRCA1/2 seq a...

Actions Menu

Actions Menu provides quick access to functions within the application for your clinical workflow. It only appears for orders submitted within Progeny, and allows you to open the pedigree or datasheet associated with the order.

 PROGENY PEDIGREES INDIVIDUALS INVITES ▾ ORDERS LETTERS SPREADSHEETS ▾ SAMPLES ▾						
Pedigrees x Orders x Orders						
Actions	Order ID	Accession #	Patient	DOB	Panel	Test
 Open Pedigree Open Datasheet	P403224		Andrew William	04/07/1987	5862	BRCA1 del/dup
	P413		Sean John	02/10/2016	8838	BRCA1/2 seq and del/dup
	P413		Sean John	02/10/2016	8822	ColoNext
	P234555		John Smith	03/09/2016	1048	HBB seq and del/dup
	P234058		Test Test	05/31/2016	8838	BRCA1/2 seq and del/dup
	P234046		Test Test	01/01/1971	5862	BRCA1 del/dup

Link Order to Patient



Link Order to Patient, accessed by clicking the link icon in the Actions column, allows you to link orders not placed through Progeny with patients in your database.

Link Order to Patient

Name: John Smith
Order ID: P234555

Name: First	Name: Last	Pedigree Name	Individual Name
Clinical	Patient		Clinical Patient
			Jamie0316
Engelbert	Humperdink		Engelbert Hu...
			Jonathan Doe
			Jamie0330d
			Ronny
			Test Why
Auto	Reminder		AutoReminder

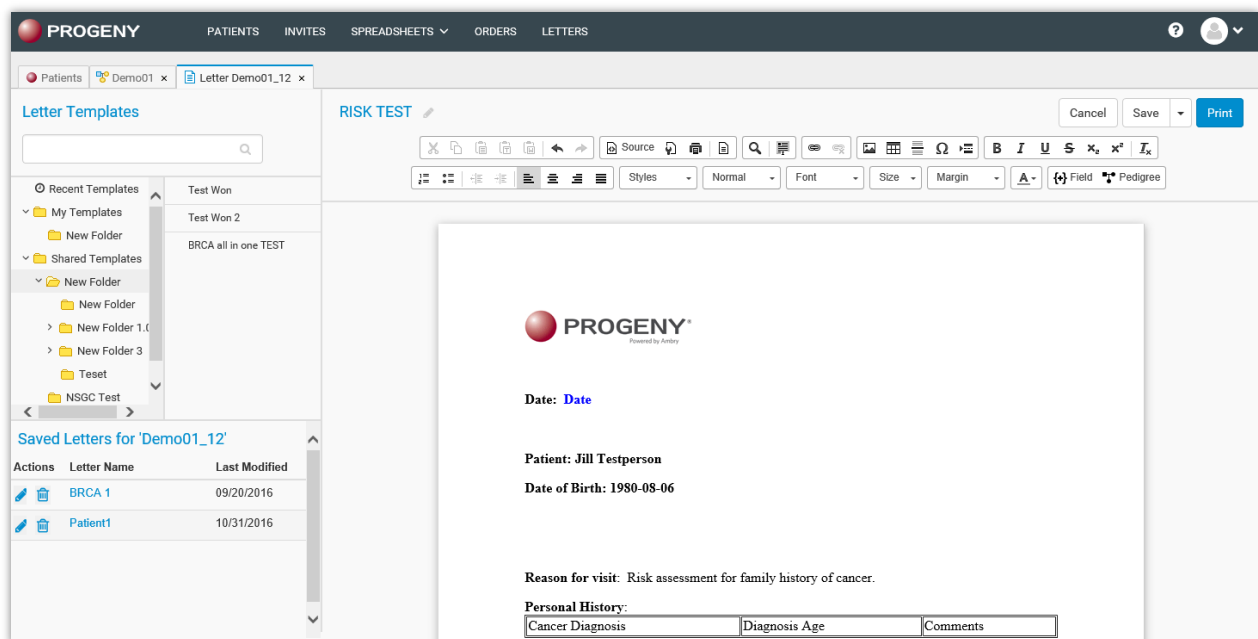
Cancel

Save

Patient Letter Generator

Creating a New Letter Template

The Letters option on the navigation tool bar opens up a Letter Templates tab. Here you can create, edit, and delete customized Letter Templates. The templates use an extensive editor that allows you to implement a variety of different styles, special characters, images, and links. Progeny also has two custom buttons in the editor: Field and Pedigree. Field will allow you to input any custom or system field placeholder from the database and Pedigree will allow you to add a resizable placeholder for the pedigree image in the template. These letters can then be generated for any individual in the database. They can also be modified and saved to a specific individual.



Letter Generator Buttons

-  Cut: deletes and copies selection to clipboard (Ctrl+X)
-  Copy: copies selection to clipboard (Ctrl+C)
-  Paste: pastes contents of clipboard
-  Paste as plain text: pastes contents of clipboard as the unformatted default format of the letter
-  Paste from Word: pastes contents from Microsoft Word
-  Undo: cancels the last change made and restores the letter to its previous state (Ctrl+Z)
-  Redo: reverts the last undo operation (Ctrl+Y)

-  **Source** Source: allows editing of html source code
-  Document Properties: displays window with General, Design, Meta Tags, and Preview options
-  Print: allows printing of letter
-  Templates: displays window of pre-defined forms with page layout, text formatting and styling
-  Find: displays window that allows searching and replacing multiple occurrences of text
-  Select All: selects all contents of the letter (Ctrl+A)
-  Link: displays window that allows adding of hyperlinks, anchors, and email addresses
-  Unlink: removes a link when cursor is placed in a link or part of a link is selected
-  Image: displays window that allows setting of configuration options that define image source, size, display properties, and other advanced properties
-  Table: displays window that allows setting of configuration options that define size, display properties, and other advanced properties
-  Insert Horizontal Line: adds a horizontal rule from one side of the letter to another at the location of the cursor
-  Insert Special Character: displays a window that allows choosing of a symbol from a set containing Latin letters, numbers (including fractions), currency symbols, punctuation, arrows, and mathematical operators
-  Insert Page Break for Printing: adds a separation, at the location of the cursor, between physical pages when printed
-  **B** Bold: bolds text (Ctrl+B)
-  *I* Italic: italicize text (Ctrl+I)
-  U Underline: underlines text (Ctrl+U)
-  ~~S~~ Strikethrough: strikes text through
-  x_2 Subscript: sets a character that is slightly smaller than the text that surrounds it below the baseline
-  x^2 Superscript: sets a character that is slightly smaller than the text that surrounds it above the baseline
-  ~~I_x~~ Remove Format: removes text styling from selected text to display default formatting
-  $\begin{matrix} 1= \\ 2= \end{matrix}$ Insert/Remove Numbered List: creates or removes a numbered list

 Insert/Remove Bulleted List: creates or removes a bulleted list

 Decrease Indent: decreases the indentation of a block-level element containing the cursor by one tabulator length

 Increase Indent: increases the indentation of a block-level element containing the cursor by one tabulator length

 Align Left: aligns paragraph with the left margin and rags text on the right side

 Center: aligns paragraph symmetrically along the vertical axis and rags text on both sides

 Align Right: aligns paragraph with the right margin and rags text on the left side

 Justify: aligns paragraph with the right margin and rags text on the left side

 Formatting Styles: allows selection of a number of pre-defined block and inline styles from a drop-down list

 Paragraph Format: allows selection of a number of pre-defined block-level styles from a drop-down list

 Font Name: allows selection of a number of typefaces that are applied to text

 Font Size: allows selection of a number of font sizes that change how big or small the text is

 Paragraph Margin: allows selection of a number of line spacing margins that change how much space is between each line in a paragraph

 Text Color: allows selection of a number of colors for text

 Add Field: displays a Field Chooser window that allows adding field placeholders from the database

 Add Pedigree: adds a resizable placeholder for the pedigree image

Creating Patient Letters

Access the generate letter screen to create letters for your patients using various methods.

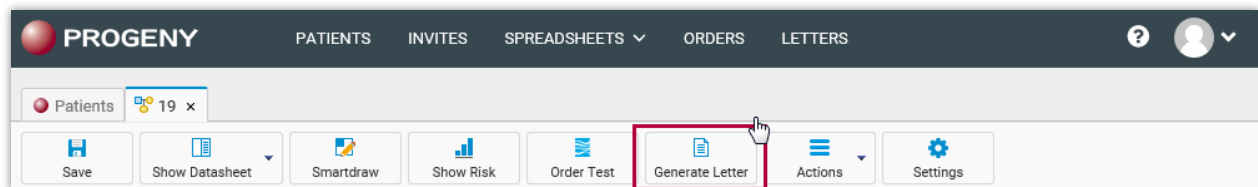
Patients Screen

On the Patient dashboard, click the **Actions Menu** dropdown, then choose Generate Letter.

Actions	Pedigree Name	Individual Name	Date of Birth	Gail 5 Year Breast Risk	MelaPro 5 Year Melanoma Risk
	18	18_1	2/16/81	0.2	0.2
Open Pedigree		19_2	7/30/78		0.2
Open Datasheet		20_1	12/20/13		
Invite Patient		21_1	3/15/01		
View Risk		22_1	4/16/69		
Delete Pedigree		23_4	11/19/41	1.8	0.3
Order Test		24_1	3/9/59		
Move Pedigree		25_1	3/15/83		
Generate Letter		26_1	1/11/99		

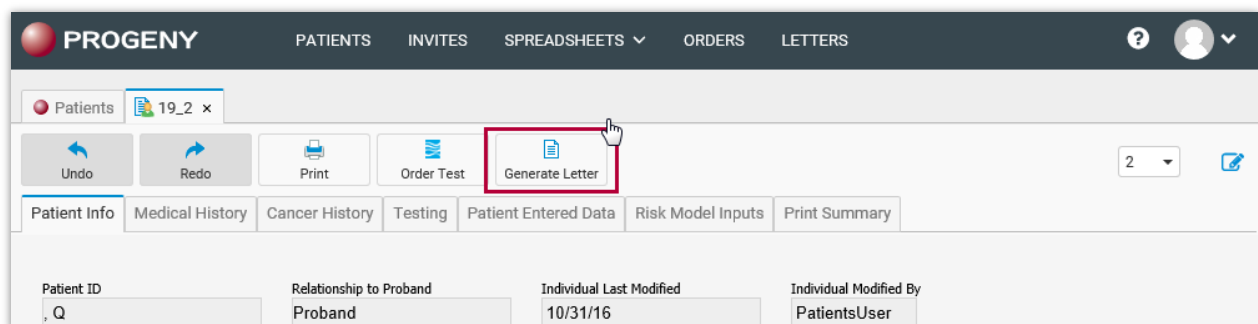
Pedigree Viewer

Click the Generate Letter button at the top toolbar menu for the Pedigree.



Individual Datasheet

Click the Generate Letter button on the Individual Datasheet toolbar menu.



Spreadsheets and Queries

Spreadsheets and Queries are used for searching for specific field data and displaying the results in a spreadsheet. You can search either your Individual level fields or your Pedigree level fields.

INDIVIDUALSINVITES ▾ORDERSLETTERS

SPREADSHEETS ▾SAMPLES ▾TASKS

Individual Spreadsheets
Pedigree Spreadsheets
Sample Spreadsheets

Actions	Pedigree Name	Pedigree Created By	Modified By	Last Modified
---------	---------------	---------------------	-------------	---------------

New SpreadsheetDel Spreadsheet

Web.Progeny10
Progeny

RunEditFormat Name

▶ Patient History

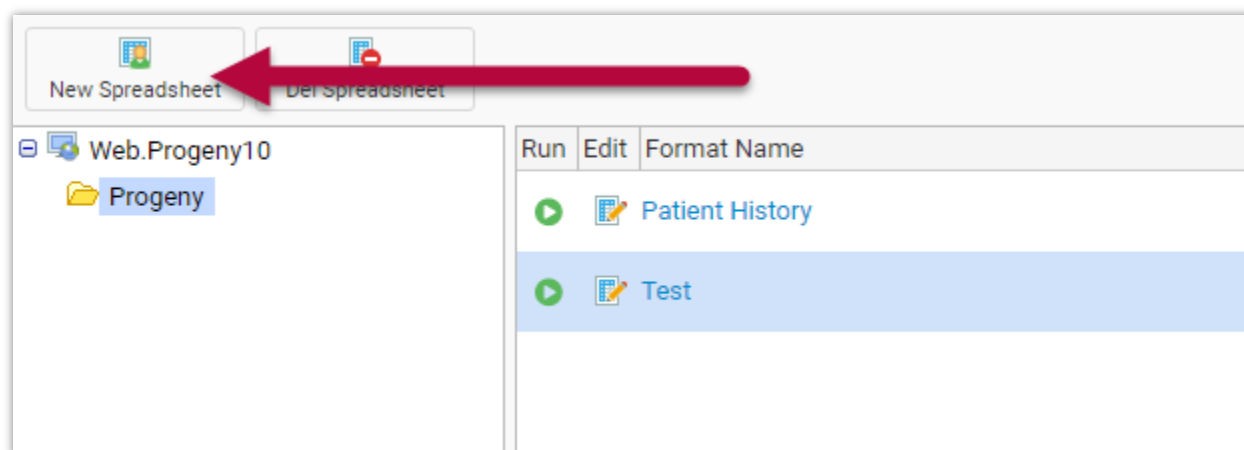
▶ Test

INDIVIDUALSINVITES ▾ORDERSLETTERS

SPREADSHEETS ▾SAMPLES ▾TASKS

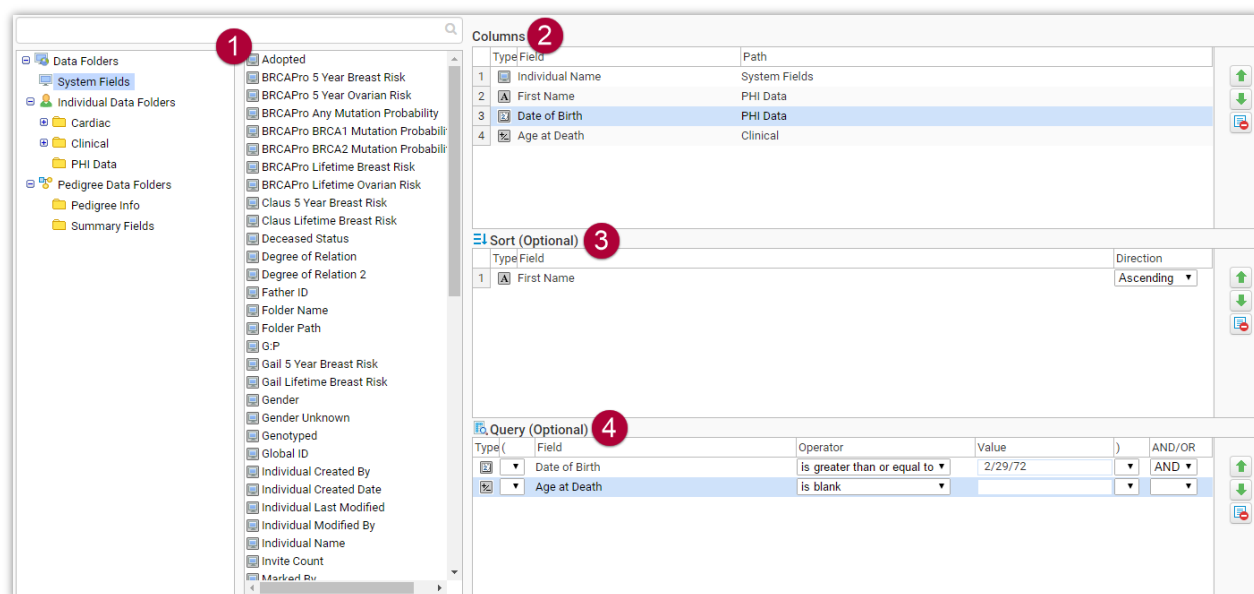
Individual Spreadsheets
Pedigree Spreadsheets
Sample Spreadsheets

Actions	Pedigree Name	Pedigree Created By	Modified By	Last Modified
☰ ▾	🔗 Cancer Example	progeny	progeny	9/3/13



BUILDING SPREADSHEETS

From these levels you can select which fields you wish to query, add logical operators to your search, and specify how the results are sorted. This is a powerful tool which can be used to perform broad and general, or granular and specific queries of your database. After you build a query it can be saved as a format, then re-run or edited as needed.



- **Query Panes** – The four panes on a query screen are for building the query.
- **Section 1** – The Fields pane which lists the fields of your database. You can search for fields in this pane by typing a portion of the field name into the search field atop the Fields pane.
- **Section 2** – The Columns pane is used to list the columns (fields) you wish displayed on the results spreadsheet. The top to bottom ordering of fields in this pane will reflect as left to right columns on

the spreadsheet results. You can change the order of the spreadsheet results columns by moving each field up or down in the Columns pane.

- **Section 3** – The Sort pane determines the sort order of your query results. Drag fields from the Fields pane into this pane or use the Add to sort icon on a Column field to copy the field into the Sort pane.
- **Section 4** - The Query pane is where you can add specific conditions to a field, e.g. Last Name equals Smith.

BUILDING QUERIES

To build a Spreadsheet Query first select the level (Individual or Pedigree) you wish to query as shown above.

1. Select which field(s) you want shown on the spreadsheet results - You can use the search field to quickly find the field you are looking for. Just type in any portion of the field name and click the magnifying glass icon on the right side of the search field.
2. Drag the field into the Columns and/or Query panes.
3. From the fields you have dragged into the Columns pane use the icons available in the mouse over menu to add it to the Sort or Query panes.
4. Specify whether you would like to sort in ascending (default) or descending order. You may sort by several fields. The first field will be the primary sort column, the second field the secondary, and so on.
5. Configure the logical operators, values, Boolean operators, and parentheses (to apply an order of operations) in the Query pane.

ORDER OF OPERATIONS FOR A QUERY:

When carrying out a multiple fields query, use parentheses to define the order of operations for a query. The order of operations determines the queries that must be carried out first in a series of queries. For example, the below image shows a query that first sorts individuals who were diagnosed with breast cancer at the age of 65. The query then sorts individuals who were diagnosed with colon cancer. Because this query uses the OR operator, the query returns individuals who meet either query criteria.

Query (Optional)					
Type (	Field	Operator	Value	)	AND/OR
 (	Cancer History.Cancer Diagnosis	equals	Breast	)	AND
)	Cancer History.Diagnosis Age	equals	65	)	OR
)	Cancer History.Cancer Diagnosis	equals	Colon	)	

At this point you can save this custom query as a format so you can quickly select it in the future to run it again. See the section Selecting, Editing, and Saving Query Formats below.

LOGICAL OPERATORS

The following logical operators are available to target your search results:

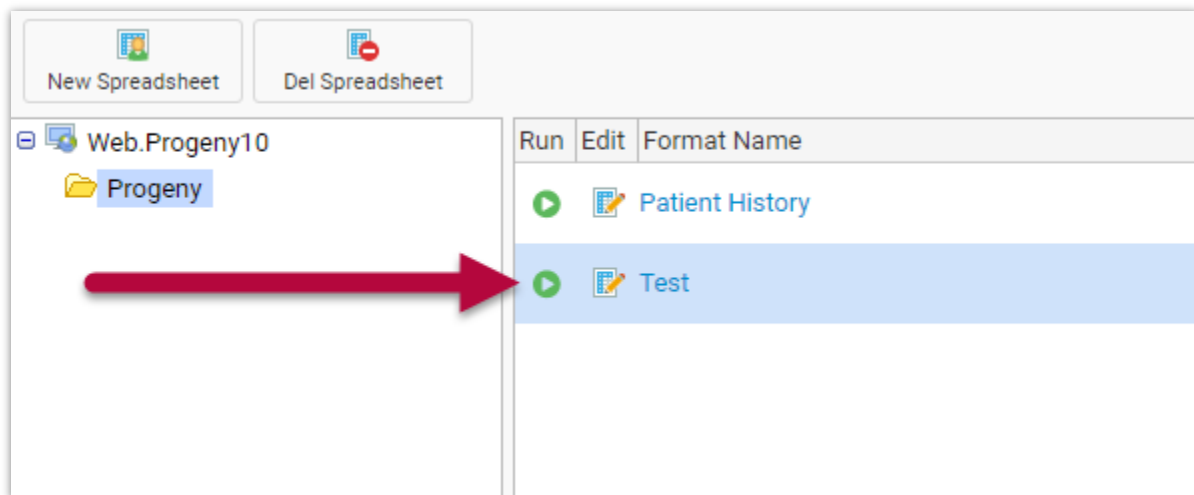
Operator	Description
begins with	Search for an item where the specified field contains data that begins with the search criteria. For example, if the query field for individuals is the Weight field, and you specify Weight begins with 17, then only those individuals for whom the weight begins with a 17 (17 or 170-179) are returned in the search.
contains	Search for an item where the specified field contains any instance of the search criteria. For example, if the query field for individuals is the Weight field, and you specify Weight contains 75
does not begin with	Search for an item where the specified field contains data that does not begin with the search criteria. For example, if the query field for individuals is the Weight field, and you specify Weight does not begin with 17, then only those individuals for whom the weight does not begin with a 17 (0-16, 18 -169, and so on) are returned in the search.
does not contain	Search for an item where the specified field does not contain any instance of the search criteria. For example, if the query field for individuals is the Weight field, and you specify Weight does not contain 75, then all individuals who have a weight in which 75 does not appear (0-74, 76-174, 176274, and so on) are returned in the search.
does not end with	Search for an item where the specified field contains data that does not end with the search criteria. For example, if the query field for individuals is the Weight field, and you specify Weight does not end with 75, then only those individuals for whom the weight does not end with a 75 (074, 76-174, 176-274, and so on) are returned in the search.
does not equal	Search for an item that meets any criteria other than the specified value For example, if the query field for individuals is the Weight field, and you specify Weight $\neq$ 175, then only those individuals whose weight does not equal 175
ends with	Search for an item where the specified field contains data that ends with the search criteria. For example, if the query field for individuals is the Weight field, and you specify Weight ends with 75, then only those individuals for whom the weight ends with a 75 (75, 175, 275, and so on) are returned in the search.
equals	Search for an exact match. For example, if the query field for individuals is the Weight field, and you specify the search criteria as Weight = 175, then only those individuals whose weight is exactly 175 are returned in the search.

in	Allows for comma separated values to be entered into a field so that multiple items can be searched and returned in the search results. For example, if the query field for individuals is the Weight field, and you specify Weight in 75, 80, 85, 90, then all individuals whose weight is exactly 75, 80, 85, or 90 are returned in the search. Note: You can copy and paste a list of values from .csv file into a query of this type.
is blank	Search for an item where the specified field contains absolutely no data. For example, if the query field for individuals is the Weight field, and you specify Weight is blank, only those individuals for whom data has not been entered into the Weight field are returned in the search. Note: A zero (0) is an actual data value. This means that if a zero (0) has been entered into the Weight field for an individual, then the individual is not returned in the search.
is greater than	Search for an item that is greater than the specified value. For example, if the query field for individuals is the Weight field, and you specify Weight > 175, then only those individuals whose weight is greater than 175 are returned in the search.
is greater than or equal to	Search for an item that is greater than the specified value or is an exact match for the specified value. For example, if the query field for individuals is the Weight field, and you specify Weight $\geq$ 175, then those individuals whose weight is exactly 175 or greater are returned in the search.
is less than	Search for an item that is less than the specified value. For example, if the query field for individuals is the Weight field, and you specify Weight < 175, then only those individuals whose weight are less than 175 are returned in the search.
is less than or equal to	Search for an item that is less than the specified value or is an exact match for the specified value. For example, if the query field for individuals is the Weight field, and you specify Weight $\leq$ 175, then those individuals whose weight is exactly 175 or less are returned in the search.
is not blank	Search for an item where the specified field contains any valid data. For example, if the query field for individuals is the Weight field, and you specify Weight is not blank, all individuals for whom data has been entered into the Weight field are returned in the search. Note: A zero (0) is an actual data value. This means that if a zero (0) has been entered into the Weight field for an individual, then the individual is returned in the search.
is not in	Allows for comma separated values to be entered into a field so that multiple items can be searched and excluded from the search results. For example, if the query field for individuals is the Weight field, and you specify Weight is not in 75, 80, 85, 90, then all individuals whose weight is not exactly 75, 80, 85, or 90 are returned in the search. Note: You can copy and paste a list of values from .csv file into a query of this type.
	A pattern matching search based on the keyword "like." An underscore (_) is used to match exactly one character, and the percent sign (%) is used to indicate any number of characters. For example, if the query field for individuals is the Weight field, then to search for all individuals whose weight is

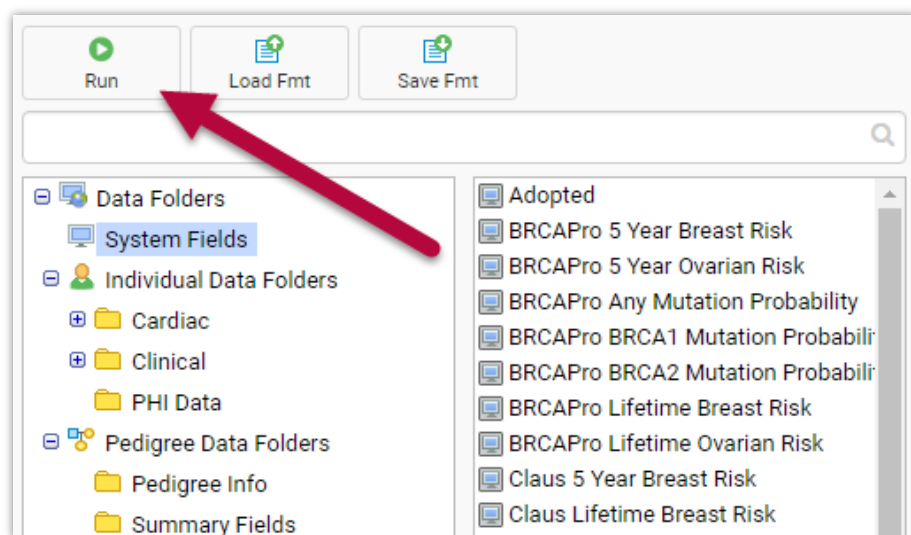
is not like	not like 75, select “is not like” as the operator and enter %75 in the Value field. The % indicates that any number of characters can come before 75, for example, 0 -74, 176 - 184, 186 - 274, and so on. Note: You can use the % anywhere in the search criteria, for example, 75% or 7%5.
like	A pattern matching search based on the keyword “like.” An underscore (_) is used to match exactly one character, and the percent sign (%) is used to indicate any number of characters. For example, if the query field for individuals is the Weight field, then to search for all individuals whose weight is like 75, select “like” as the operator and enter %75 in the Value field. The % indicates that any number of characters can come before 75, for example, 75, 175, 275, and so on. Note: You can use the % anywhere in the search criteria, for example, 75% or 7%5.

RUNNING SPREADSHEETS

Run the spreadsheet by clicking the green circle next to it from the list of all Spreadsheets.



Or by clicking “Run” in the upper left while modifying the Spreadsheet.



Need further assistance?
Our Support Team is here to help!

support@progenygenetics.com
(800)-PROGENY
(800)776-4369 x1

