PROGENY®
Powered by Ambry

Progeny 10

Web User Guide

Contents

Progeny 10: Top New Features

Letter Generation

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

EMR Hyperlink

Embed a Pedigree Hyperlink in a Patient's Record.

New Interface Design

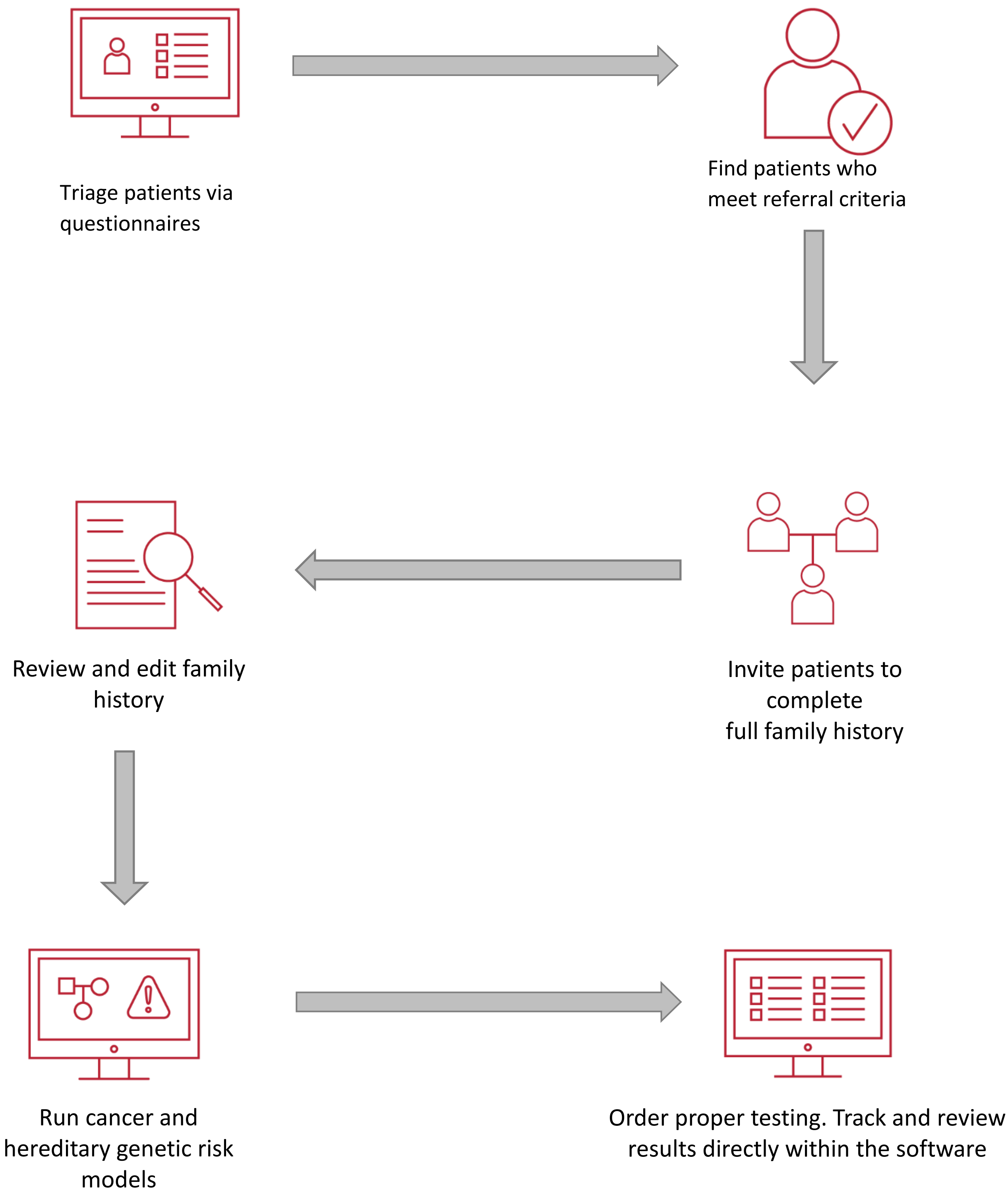
Our updated modern design looks great and makes it easier and more intuitive to navigate.

Speed

Upgraded database engine gives a faster and more dependable performance.

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

Identifying at-risk Patients



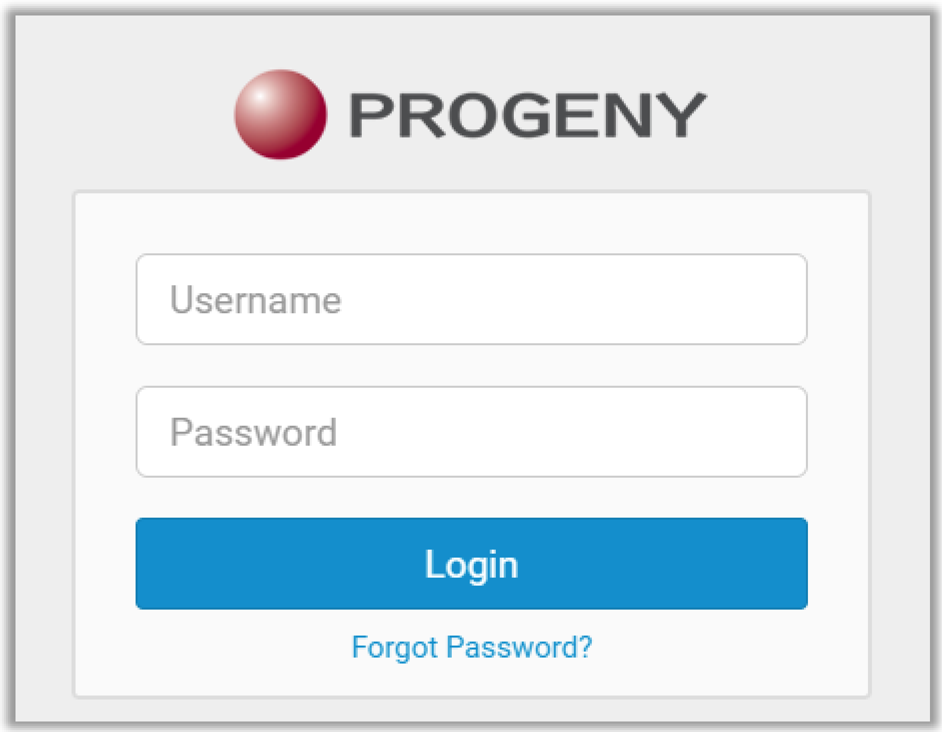
Getting Started

Using the Guide

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

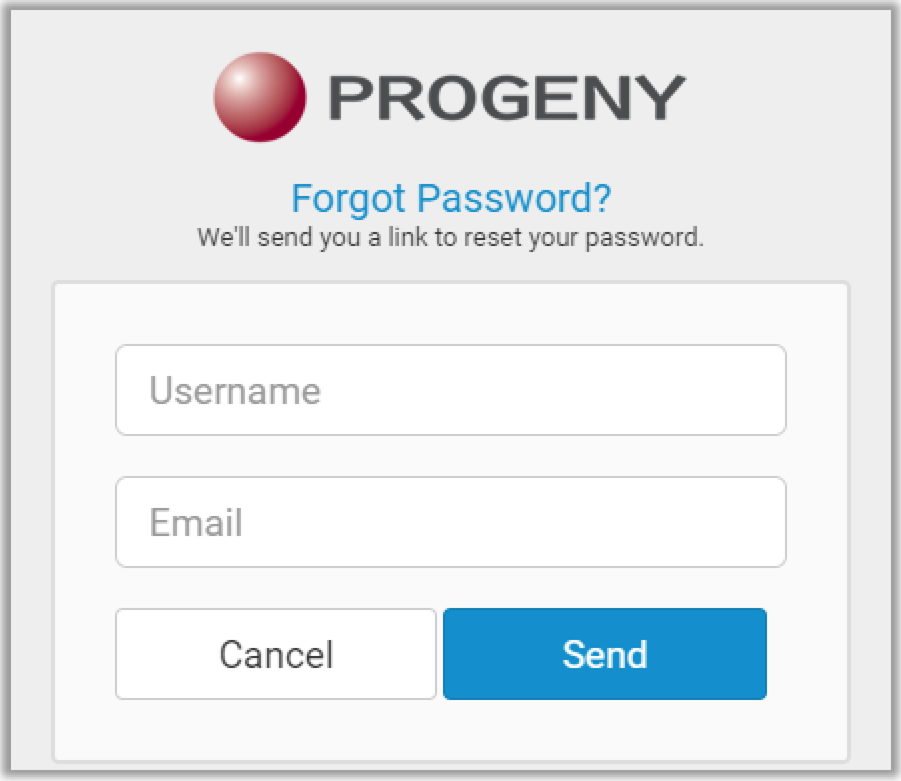
Login screen



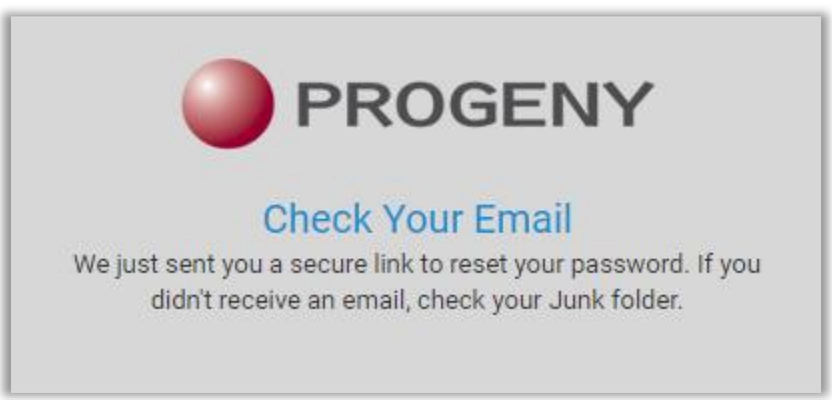
Your Progeny administrator should have provided you with the login URL, username, and password. Enter your **Username** and **Password** to log into your Progeny database.

Forgot Password

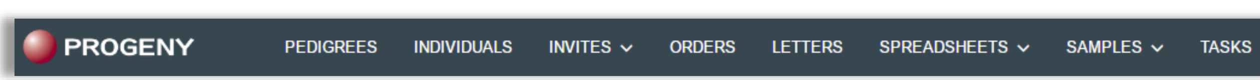
The **Forgot Password?** link can be used to reset your password.



The username must be entered along with the email address associated with the user account to proceed with the reset. Once the information is entered and **Send** is clicked, another page will be displayed, shown below.



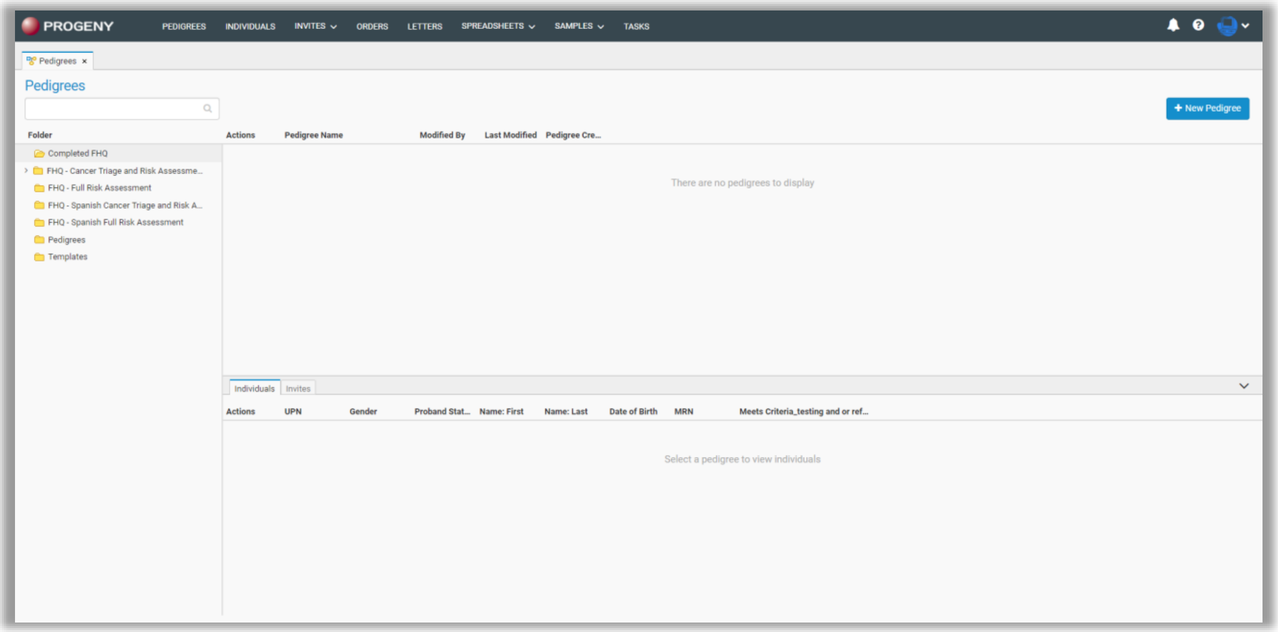
Navigation Bar



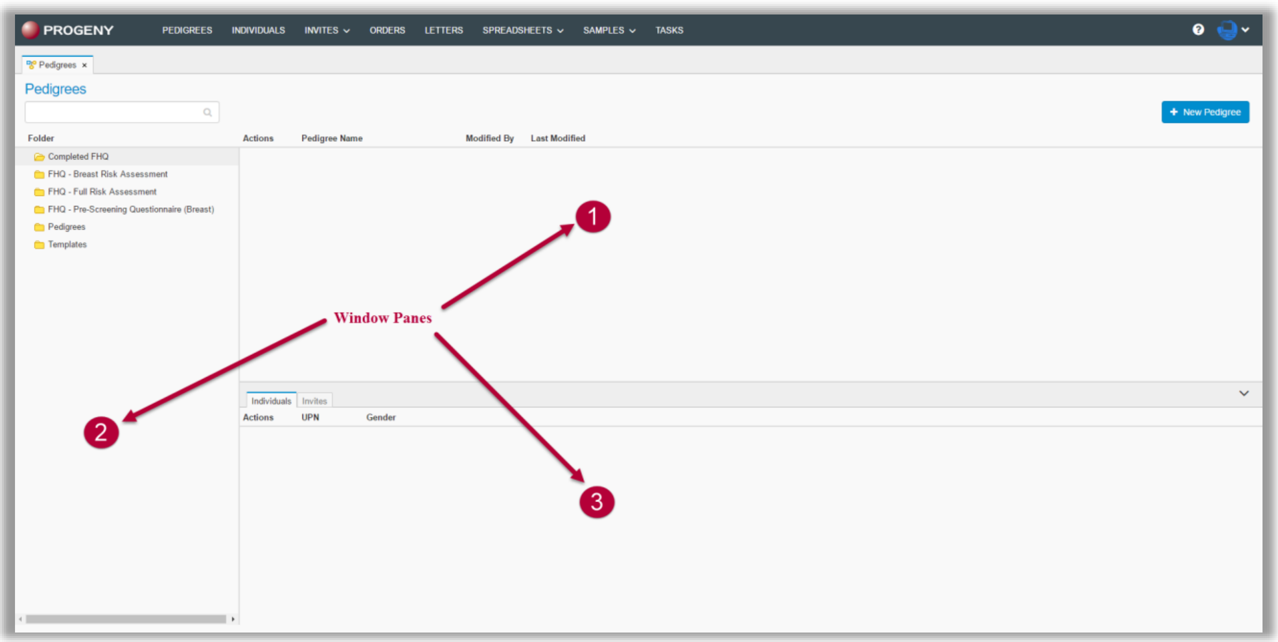
The top of the page displays the different modules in Progeny. Access to certain modules will only be available depending on your institution's licensing with Progeny as well as the user permissions for your user account. Use the toolbar by clicking on a module to open the tab to that specific module. Some modules will have a drop down to click so that other sections in that module 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 send and manage invitations.
    - **Edit Questionnaires** – opens the Edit Questionnaires module to customize the FHQs (Family History Questionnaires).
    - **Email Templates** – opens the Email Templates module to edit the FHQ email templates.
- **Orders** – opens the Orders module to review the orders for the 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.
    - **Pedigree Spreadsheets** - opens the Pedigree Spreadsheets module to create and load spreadsheets for the Pedigree level.
    - **Sample Spreadsheets** - opens the Sample Spreadsheets module to create and load spreadsheets for the Sample level.
- **Samples - This will not be reviewed in the guide since this is no longer offered.**
    - **Samples** – opens the Samples module to manage samples.
    - **Containers** – opens the Containers module to manage the different sample containers.
    - **Inventory** – opens the Inventory module to view the samples in their respective containers.
- **Tasks** – opens the Tasks module to schedule takes. **This will not be reviewed in the guide since this is no longer offered.**

Pedigrees Module



Windowpanes

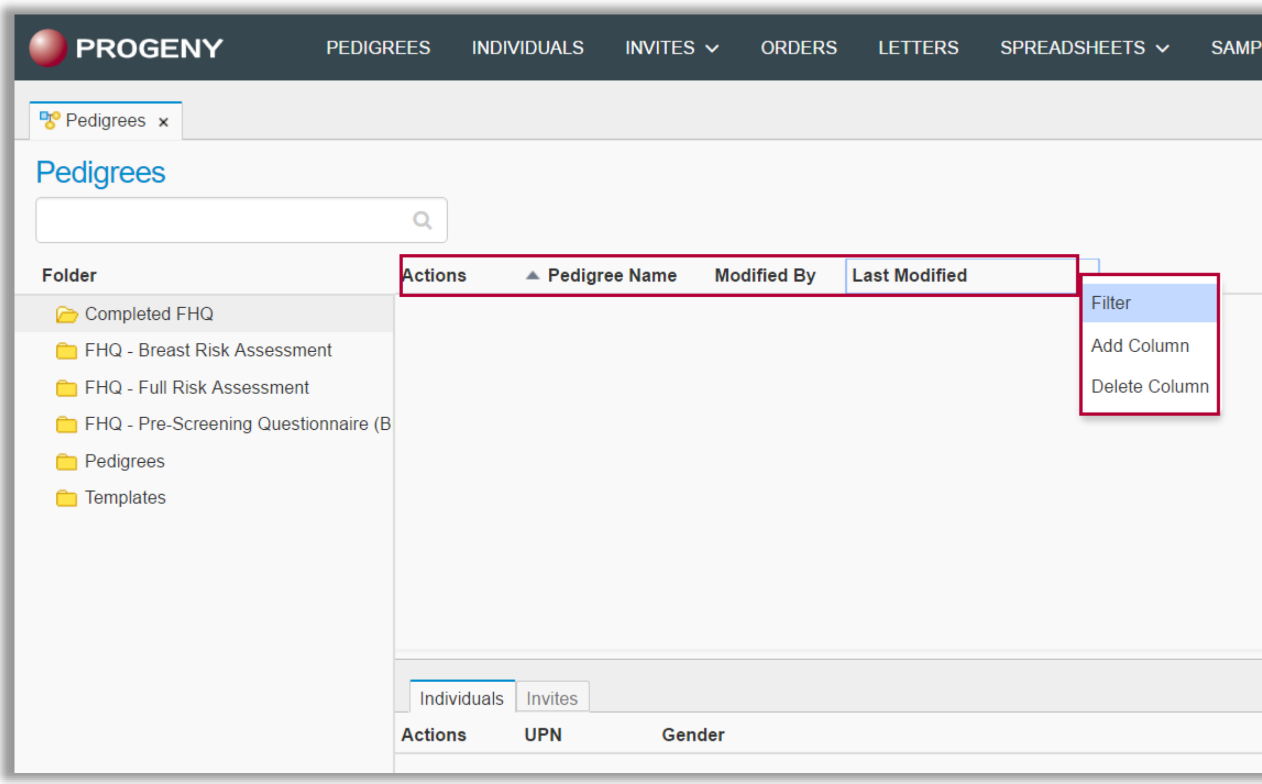


Progeny has three main windowpanes. The left vertical pane displays the folder organization for a functional area in a Windows Explorer-style structure. Click on a folder in the pane to open the folder. As folders and sub-folders are opened in this pane, detailed information about the folder's contents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

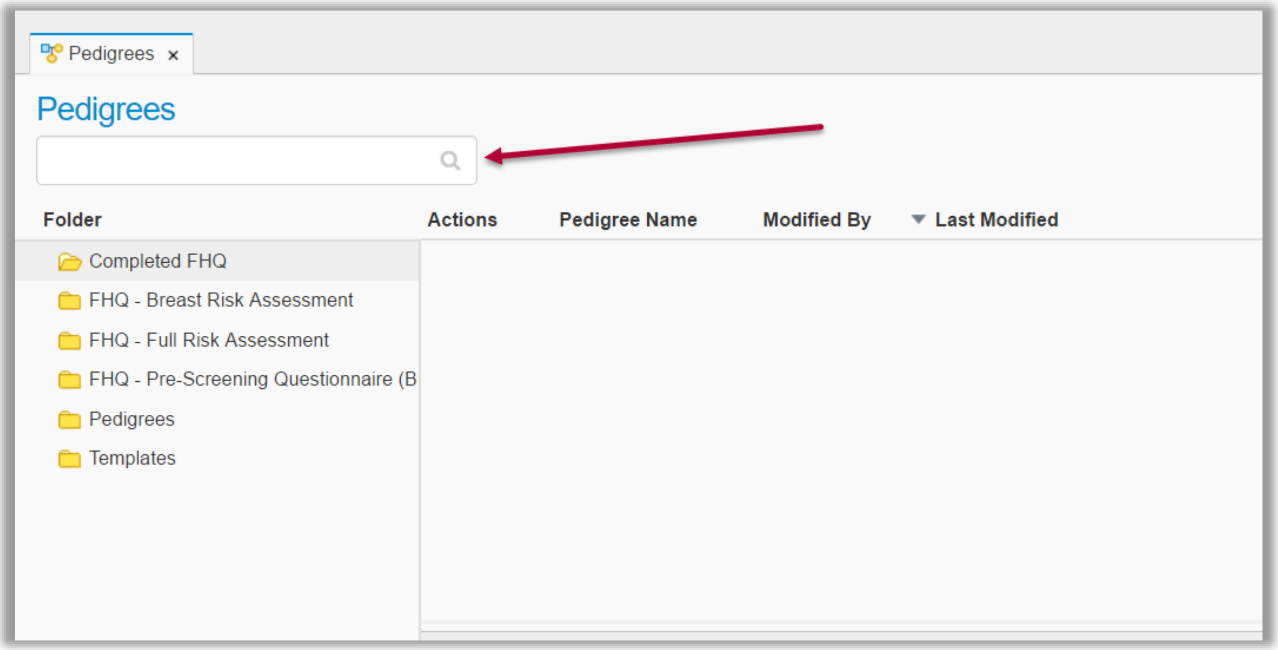
A row of uniquely chosen data fields to display on the main screen for a quick view. These fields are used to search the data quickly from the smart search feature. The search results only display the data found in the fields on the smart column.



1. **Filter** – Filters the view of any field in the smart column so that you can specify the criteria for that column.
2. **Add Column** – allows you to add any field in the database as a column.
3. **Delete Column** – deletes a column from the view.

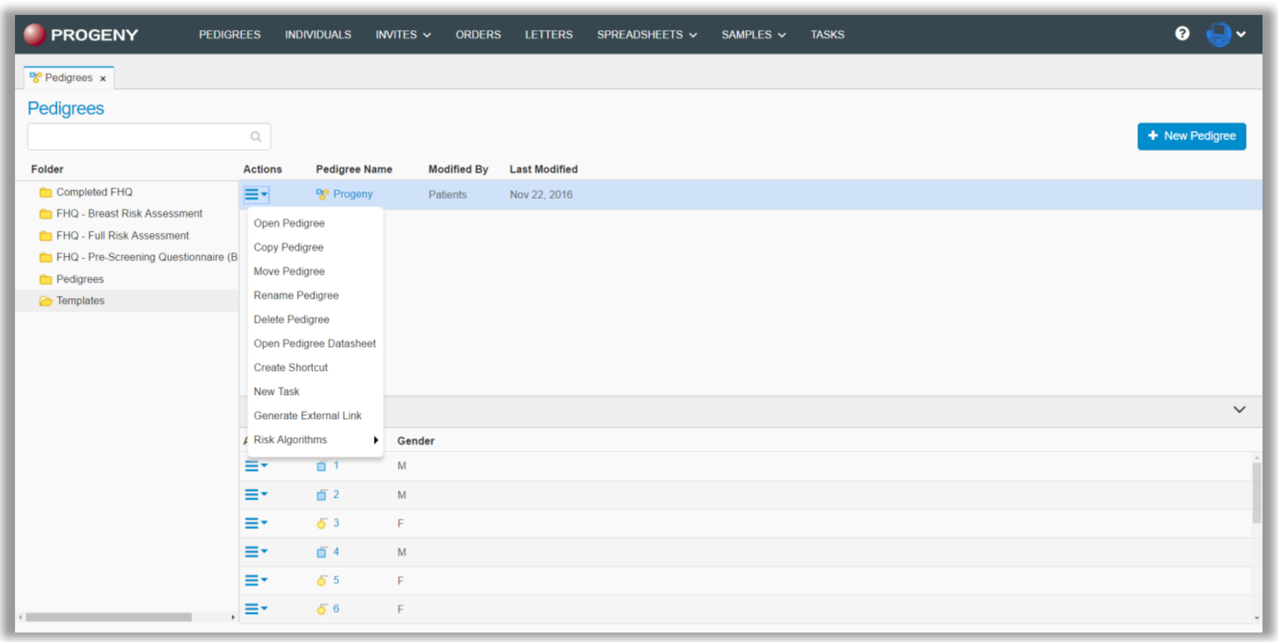
Smart Search

Searches only the data that is displayed in the columns in your smart column. 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

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

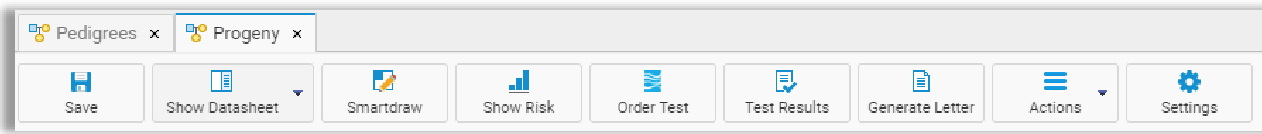


- **Open Pedigree** - opens the pedigree.
- **Copy Pedigree** - creates a copy of the pedigree in the specified folder.
- **Move Pedigree** - moves the pedigree to another folder.
- **Rename Pedigree** - renames the pedigree.

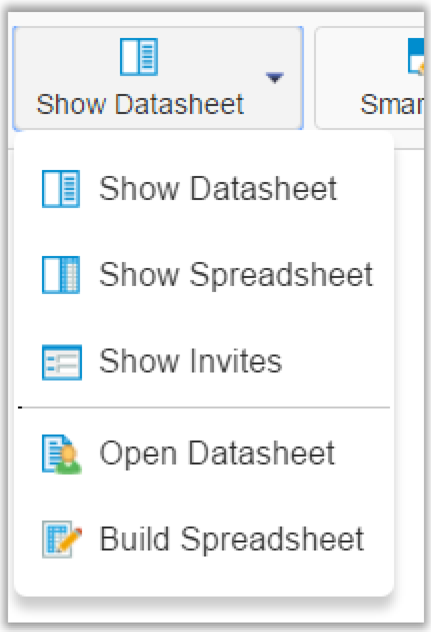
    - **Rename Individual Names** - also renames the individual names.
- **Delete Pedigree** - removes the pedigree and the individuals in that pedigree from the database.
- **Open Pedigree Datasheet** - opens the pedigree datasheet for that pedigree.
- **Create Shortcut** - creates a shortcut of the pedigree in a specified location so that changes can be made to the shortcut which also reflects on the original pedigree.
    - **Open on Save** - opens the shortcut pedigree immediately after it is created.
- **New Task** - allows the creation of a task in relation to the pedigree.
- **Generate External Link** - generates a web URL link to view the pedigree.
- **Risk Algorithms** - exports pedigrees in a format for the specified Risk Algorithm
    - **CAGene**
    - **Boadicea**
    - **BRCAPro**

Pedigree View

Toolbar

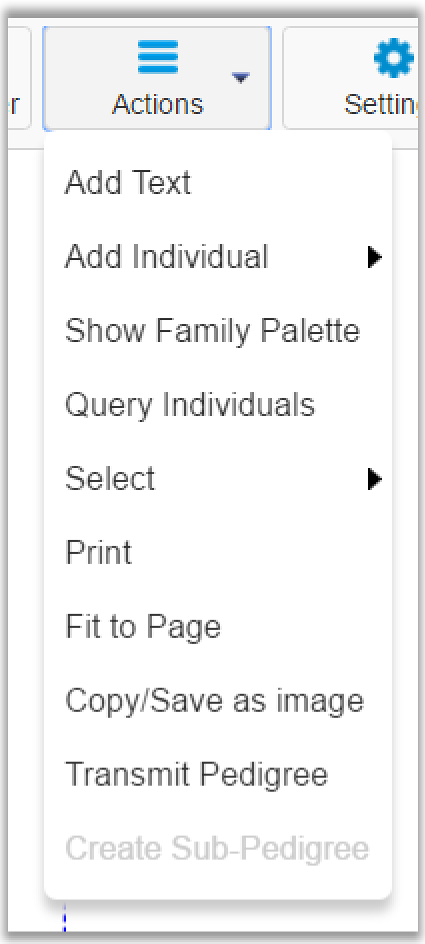


- **Save** – saves the current pedigree and any changes that were made.



- **Show Datasheet/Hide Datasheet** – shows or hides the split view datasheet for the selected individual.
- **Show Spreadsheet/Hide Spreadsheet** - shows or hides a selected/default spreadsheet for the current pedigree.

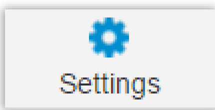
- **Show Invites/Hide Invites** – shows or hides the invite pane for the individuals on the pedigree.
- **Open Datasheet** – opens the datasheet in full view for the selected individual.
- **Build Spreadsheet** – builds/loads a spreadsheet for the current pedigree.
- **Smartdraw** – applies the Smartdraw 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** – sends pre-verification for insurance before placing the complete order.
    - **Map Fields** – used to map the basic fields for the Ambry TRF.
- **Test Results -** opens the new Test Results Module where genetic testing data can be entered.
- **Generate Letter** – generates a letter for the selected individual based on the letter template selected.
- **Actions –** shows a menu of different actions to perform.



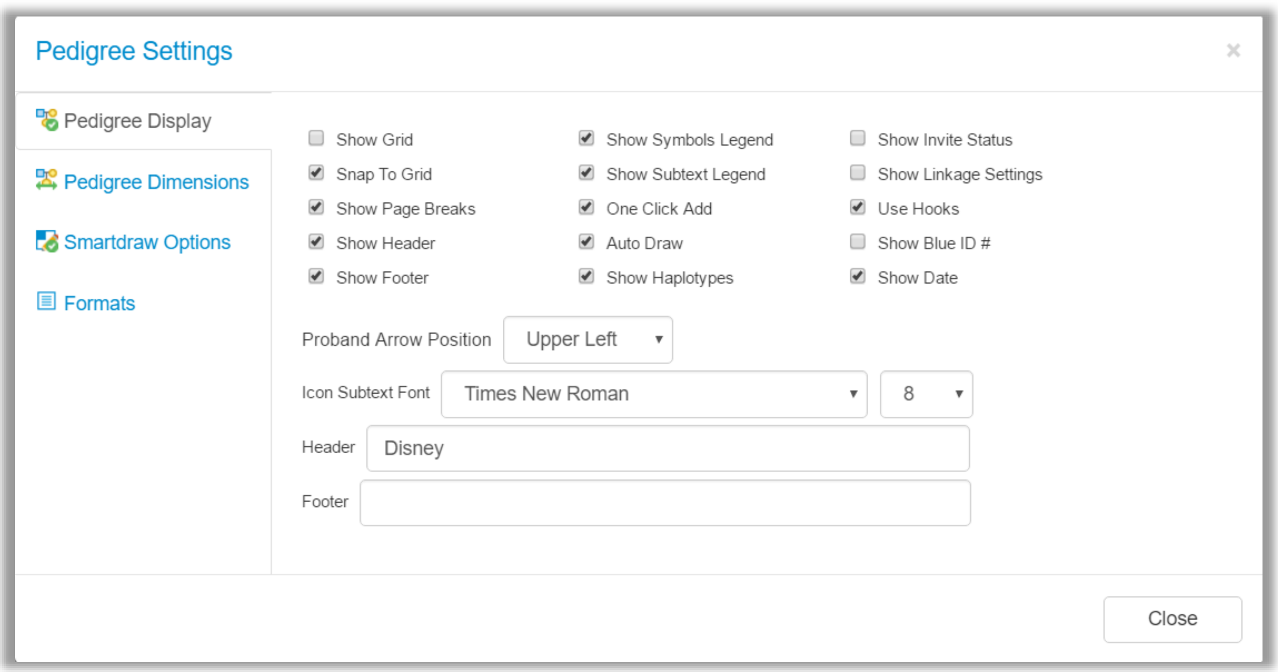
    - **Add Text** – adds a customized pedigree text.
    - **Add Individual** – adds a male or female to the pedigree canvas.
    - **Show Family Palette** – displays the family palette to add individuals to the pedigree.
    - **Query Individuals** – displays the individuals on the pedigree based on the 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.



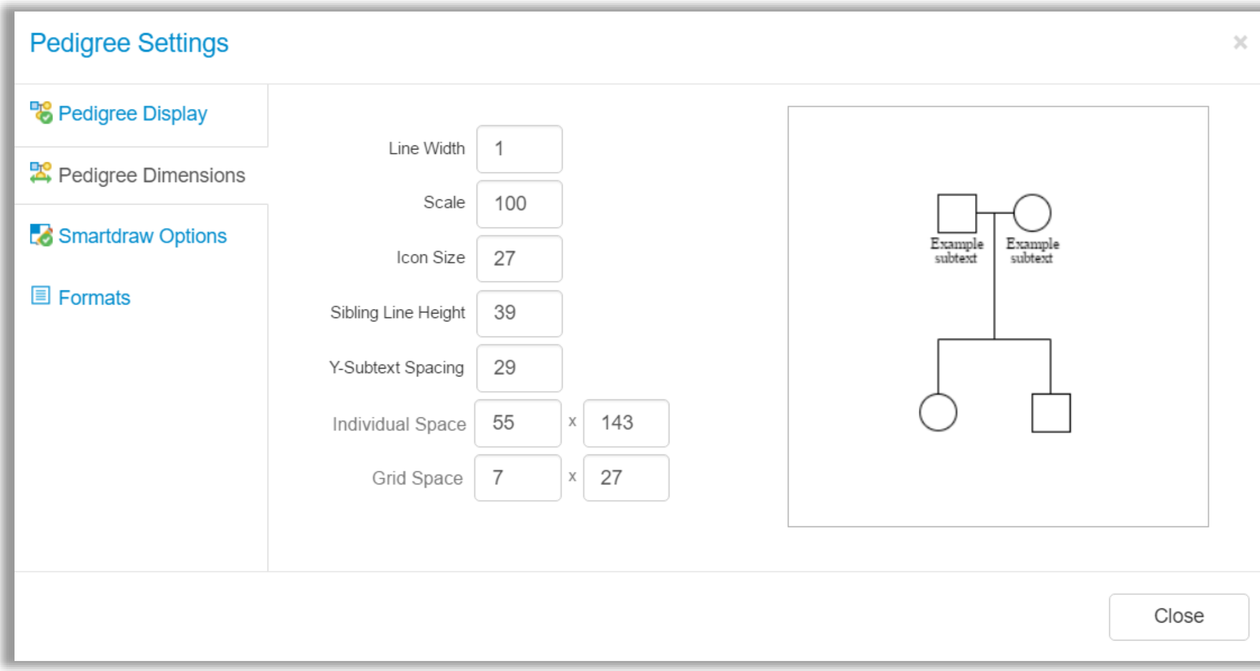
- ○ **Pedigree Display –** customizes the display on the pedigree canvas.



- ▪ **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).

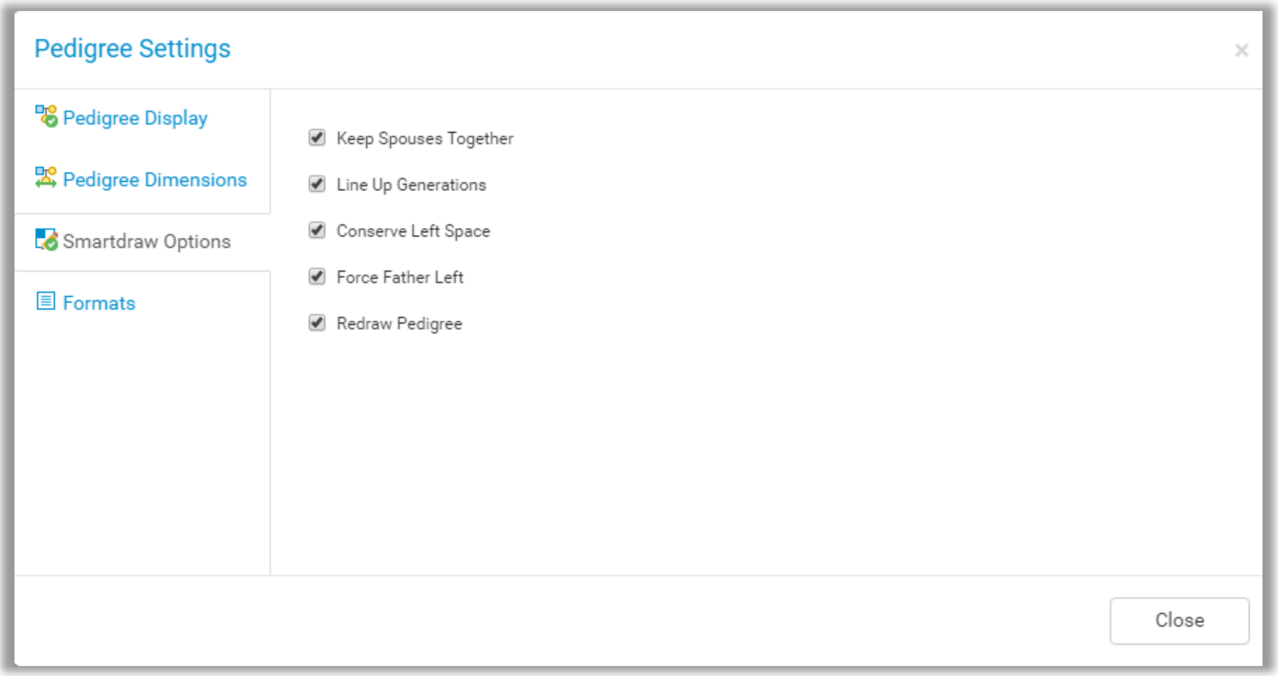
- **Auto Draw** – automatically runs Smartdraw on the pedigree when new individuals are added to the pedigree.
- **Show Haplotypes** – displays a colored-coded legend for markers that are displayed on a pedigree.
- **Show Invite Status** – displays the invite status for individuals on the pedigree.
- **Show Linkage Settings** –displays the linkage sample status on the pedigree (Sample/Plate/Genotype) and shows 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 everyone 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 of the pedigree.

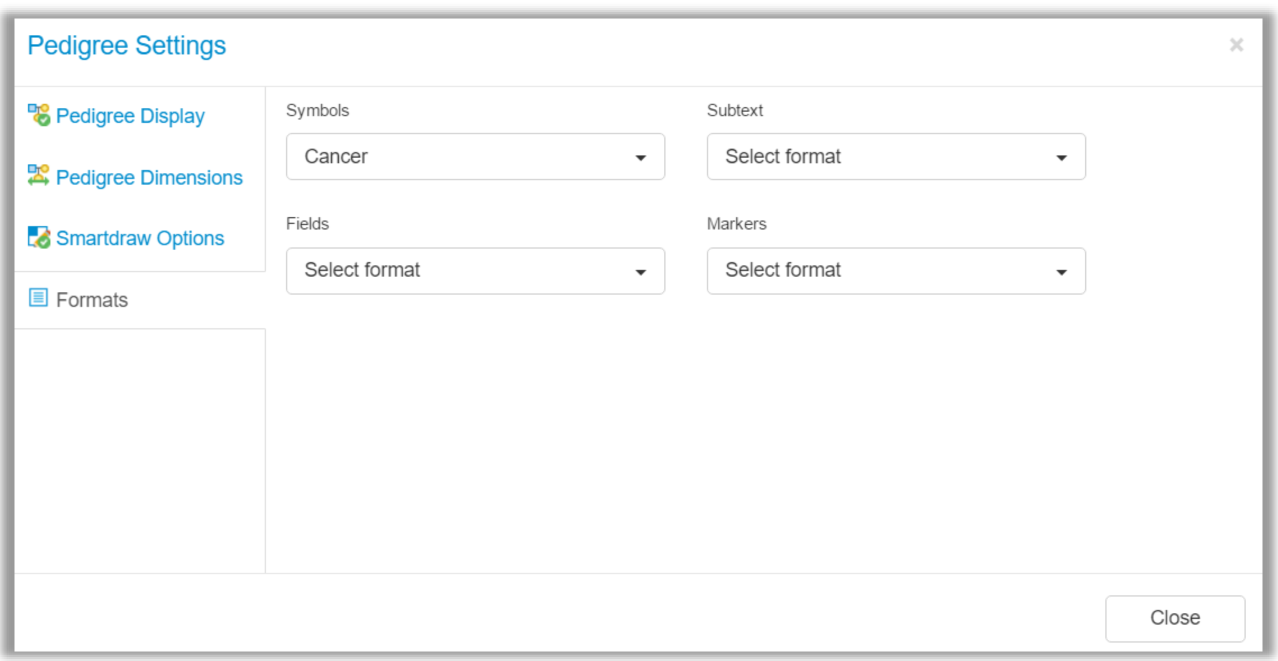


- **Line Width** – changes the width of the relationship lines.
- **Scale** – changes the magnification level of the pedigree.
- **Icon Size** – changes the size of the individual icons.
- **Sibling Line Height** – changes the height of the sibling relationship line.
- **Y-Subtext Spacing** – changes 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.



  - **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.



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

Individual Right-click Menu

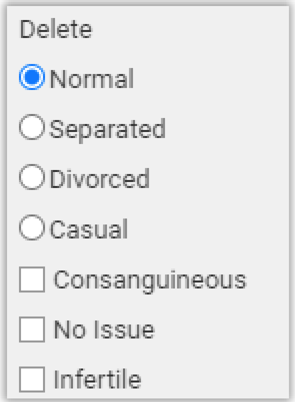
Displayed by right-clicking on Individual on the pedigree.

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

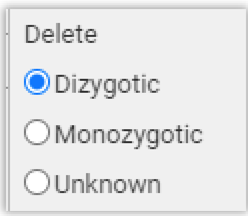
Relationship Line Menu

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 (only applies to spouse or twin relationship lines).

- Spouse options

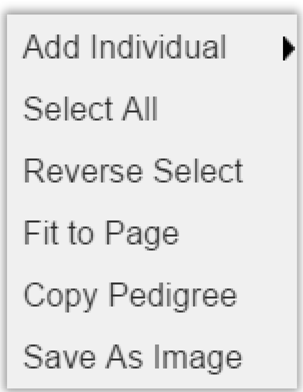


- Twin options



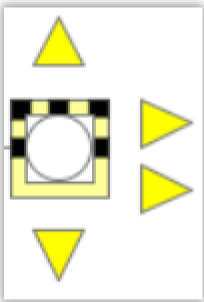
Pedigree Canvas Right-click Menu

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 other 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



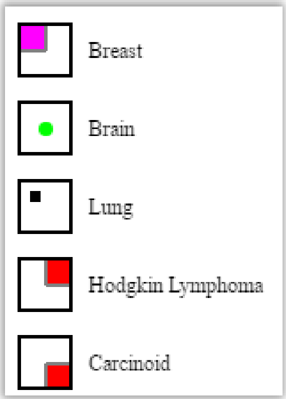
- **Top arrow –** left click to add a father and right click to add a mother.
- **Top right arrow** – left click to add a brother, right click to add a sister, and hold ctrl and click to add a twin.
- **Bottom right arrow** – left or right click to add a spouse.
- **Bottom arrow** – left click to add a son and right click to add a daughter.

Pedigree Data Fields

Data Fields 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.

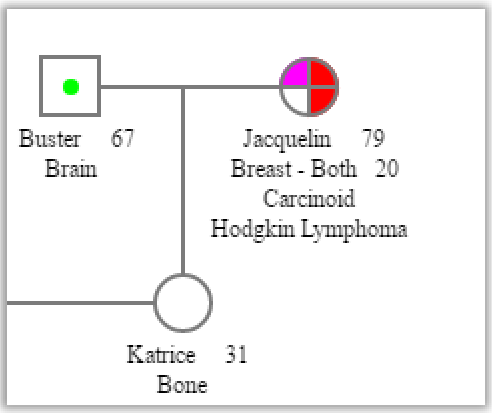
Symbols Legend

This legend auto-populates as you add cancers and/or disease that are predefined within the 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.



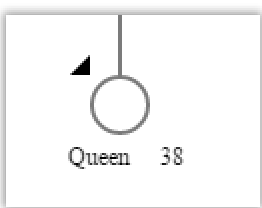
Subtext

This text is found under everyone and can be edited in the Individual Datasheet. Subtext can be customized to display data on the pedigree from any fields in the database.



Proband

The 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.

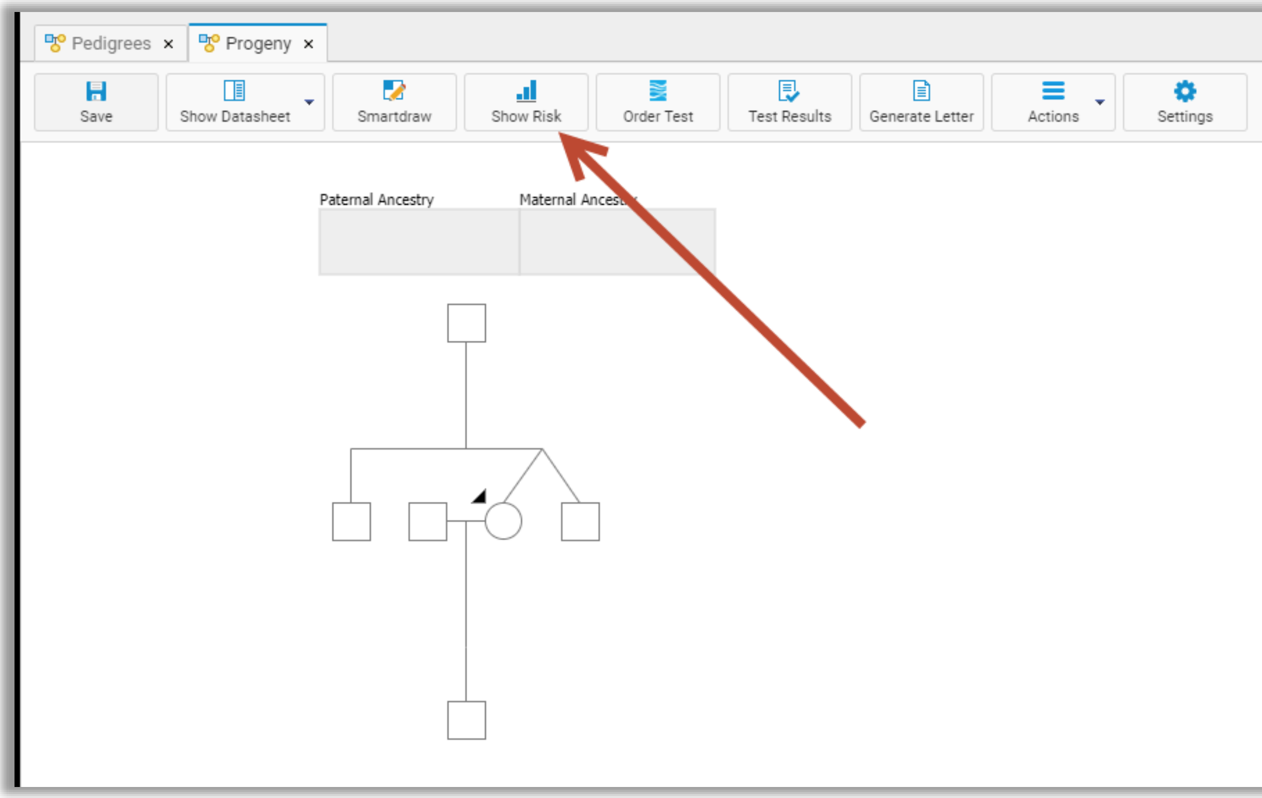


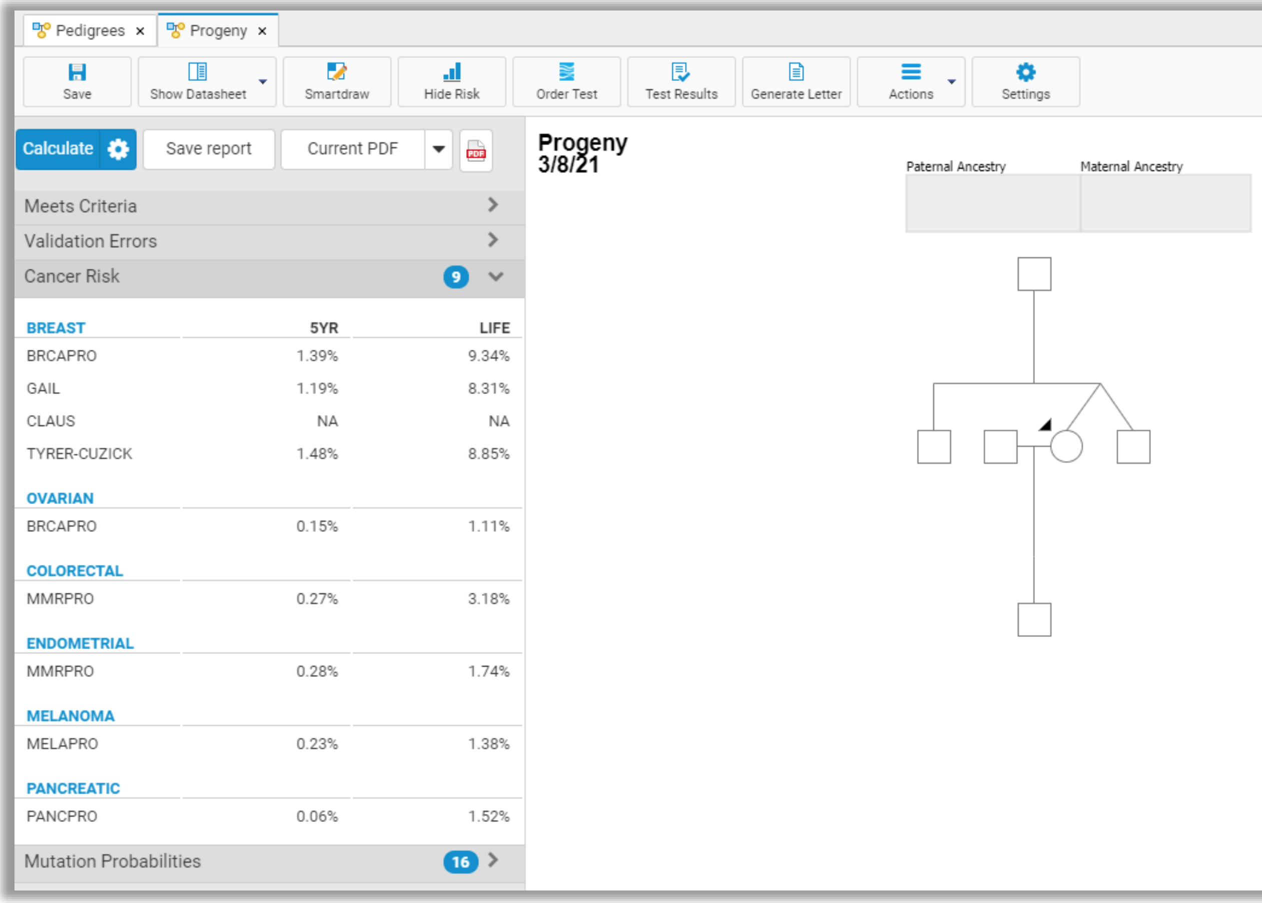
Cancer Risk Assessment

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 needed to run these models are automatically showed for you. Risk calculations can be easily saved and timestamped or generated as a .pdf at any time.

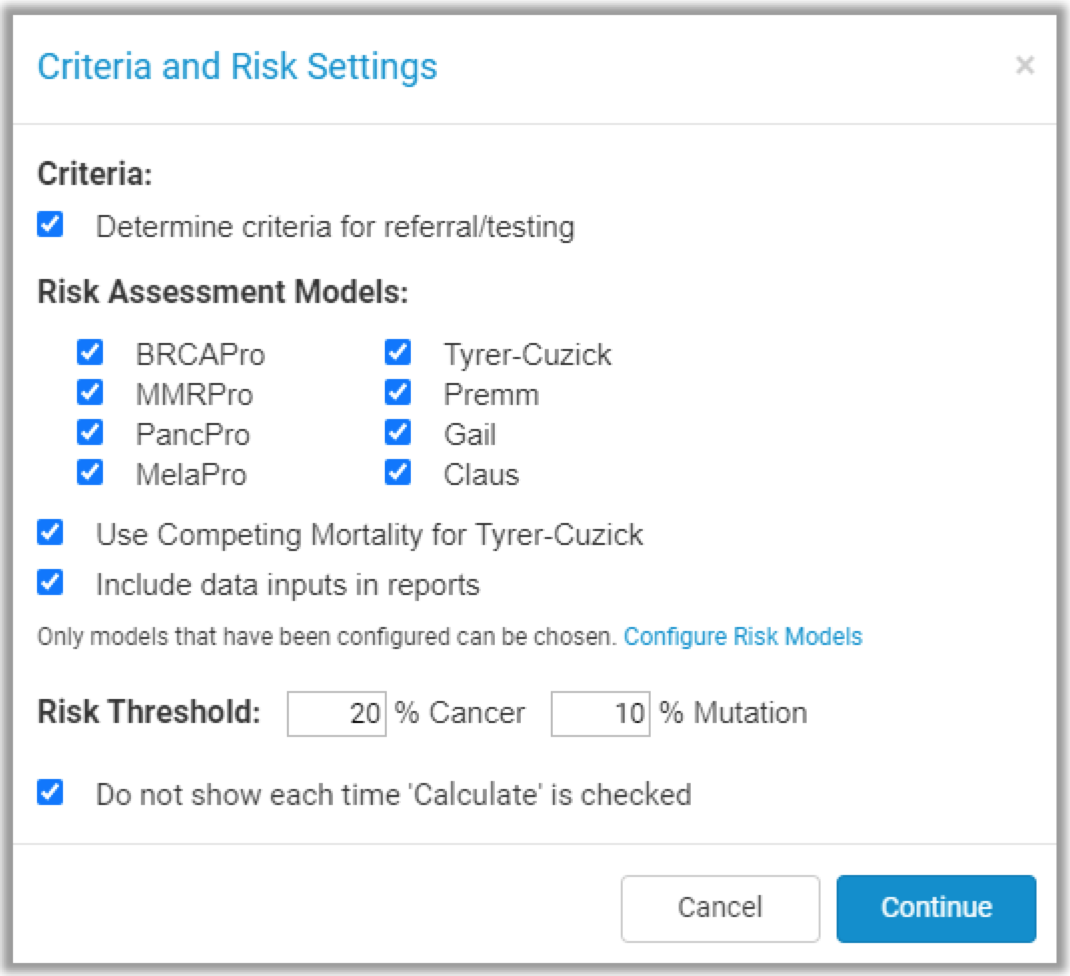
First, Click Show Risk button on the Pedigree Toolbar to open the Risk Models screen:





Features:

- The cogwheel is used to customize which risk models to run.
- **Calculate** - calculates the configured risk model(s).
- **Save Report/Delete Report** – saves/deletes the risk report which can also be downloaded and/or printed as a PDF.
- The available risk models include BRCAPro, MMRPro, PancPro, MelaPro, Tyrer-Cuzick, Premm, Gail, and Claus.



- **Use Competing Mortality for Tyrer-Cuzick** - uses the additional feature for the Tyrer-Cuzick risk model which includes other risk factors in the calculation.
- **Include data inputs in reports** – displays the data inputs that are used for the calculation in the PDF report.
- **Risk Threshold** - specifies what risk calculation percent will be highlighted in red once that threshold is reached.
    - **Cancer**
    - **Mutation**
- **Do not show each time 'Calculate' is checked** – specifies that the only way to reach the risk settings is by clicking the cog wheel instead of showing the settings every time the Calculate button is clicked.

Risk Assessment Results

Meets Criteria

Proband does not meet criteria.

Validation Errors

Cancer Risk 9

BREAST	5YR	LIFE
BRCAPRO	1.39%	9.34%
GAIL	1.19%	8.31%
CLAUS	NA	NA
TYRER-CUZICK	1.48%	8.85%
OVARIAN		
BRCAPRO	0.15%	1.11%
COLORECTAL		
MMRPRO	0.27%	3.18%
ENDOMETRIAL		
MMRPRO	0.28%	1.74%
MELANOMA		
MELAPRO	0.23%	1.38%
PANCREATIC		
PANCPRO	0.06%	1.52%

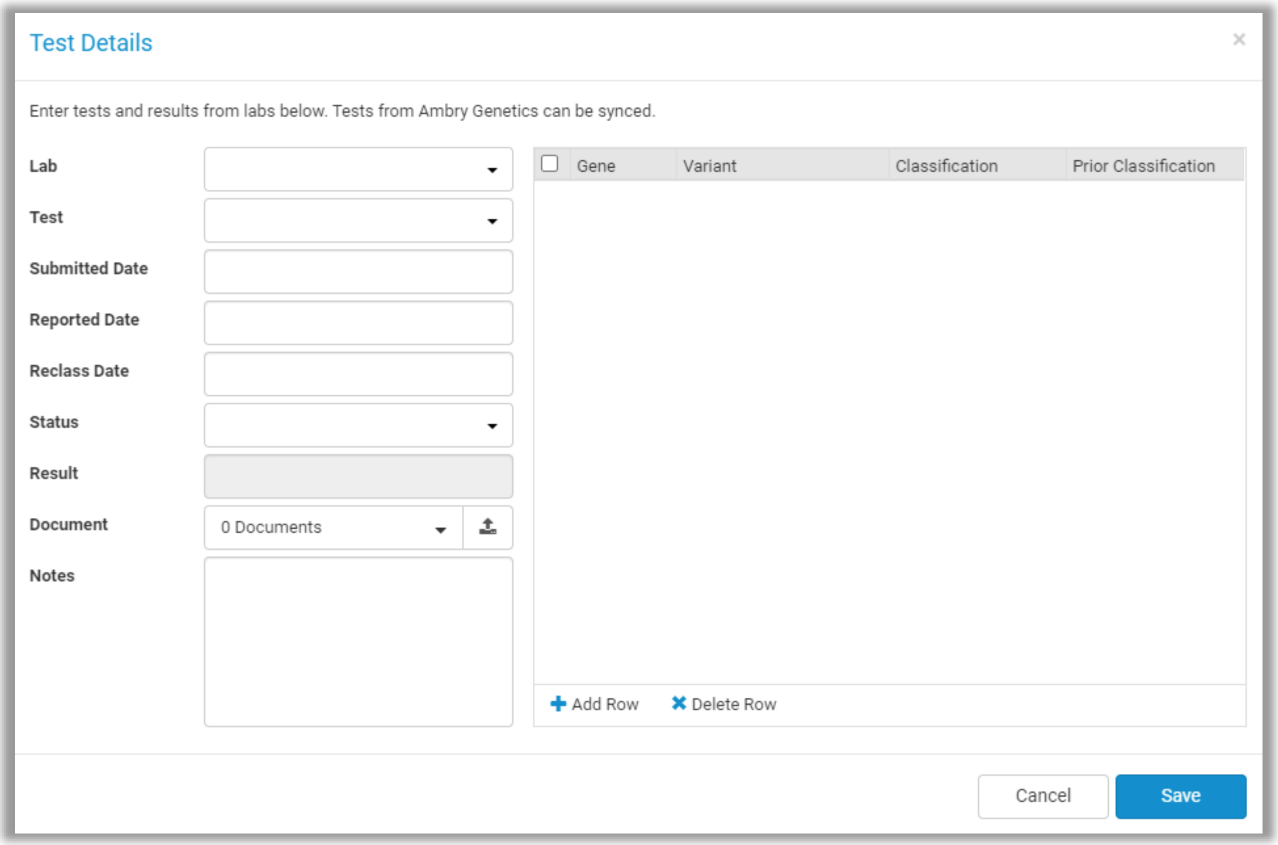
Mutation Probabilities 16

BRCAPRO	%
BRCA1	0.06%
BRCA2	0.09%
ANY	0.14%
TYRER-CUZICK	
BRCA1	0.03%
BRCA2	0.08%
ANY	0.11%
MMRPRO	
MLH1	0.05%
MSH2	0.06%
MSH6	0.02%
ANY	0.14%
MELAPRO	
ANY	0.01%
PANCPRO	
ANY	0.65%
PREMM	
MLH1	0.30%
MSH2	0.33%
MSH6	0.33%
ANY	0.96%

- **Meets Criteria -** displays if the patient meets criterial for referral/testing.
- **Validation Errors** – shows if you have missing or invalid data for an individual.
- **Cancer Risk** – 5-year and lifetime cancer risk
- **Mutation Probabilities** – All mutation probabilities are displayed here.

Test Results

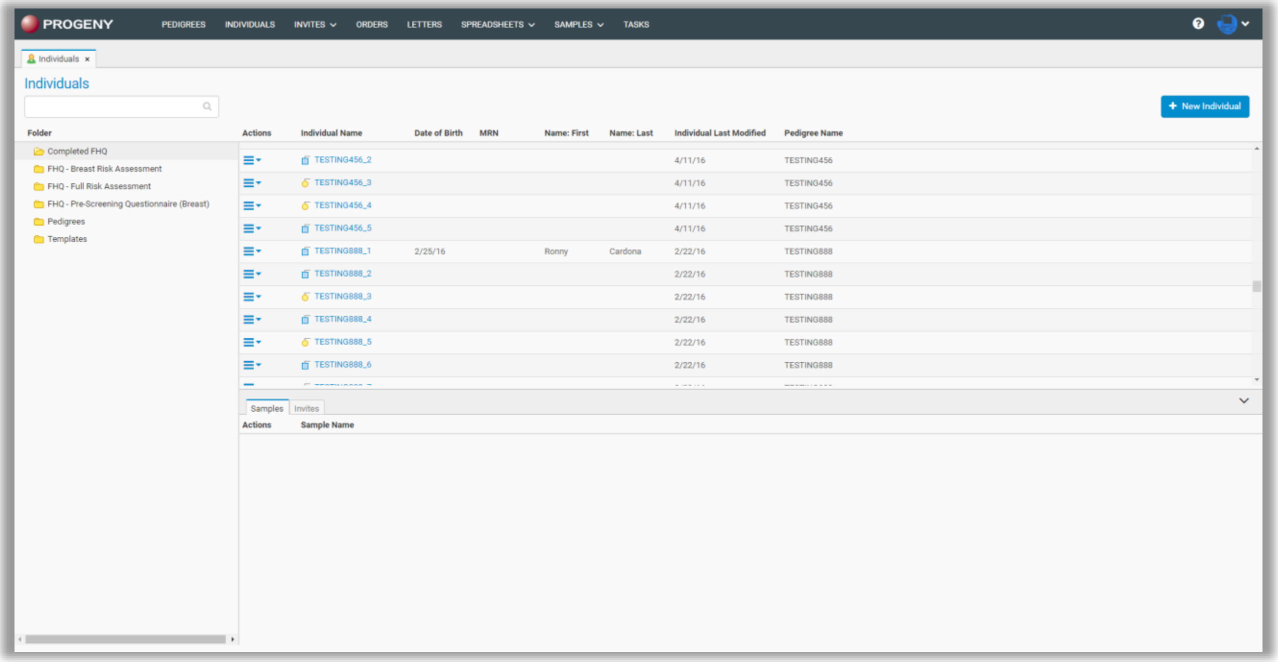
The Test Results module is used to track the Genetic testing information for patients.



- **Lab** - the lab for where the testing took place.
- **Test** - the panel or name of the test.
- **Submitted Date** - date the test was submitted.
- **Reported Date** - date the test results were reported.
- **Reclass Date** - date of reclassification of the gene(s).
- **Status** - the status of the test.
- **Result** - the results of the test.
- **Document** - documents can be attached that are related to the test.
- **Notes** - notes regarding the test.
- **Genes** - the genes that were tested. Genes can be manually removed and added using the Add Row and Delete Row buttons.

Individuals Module

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

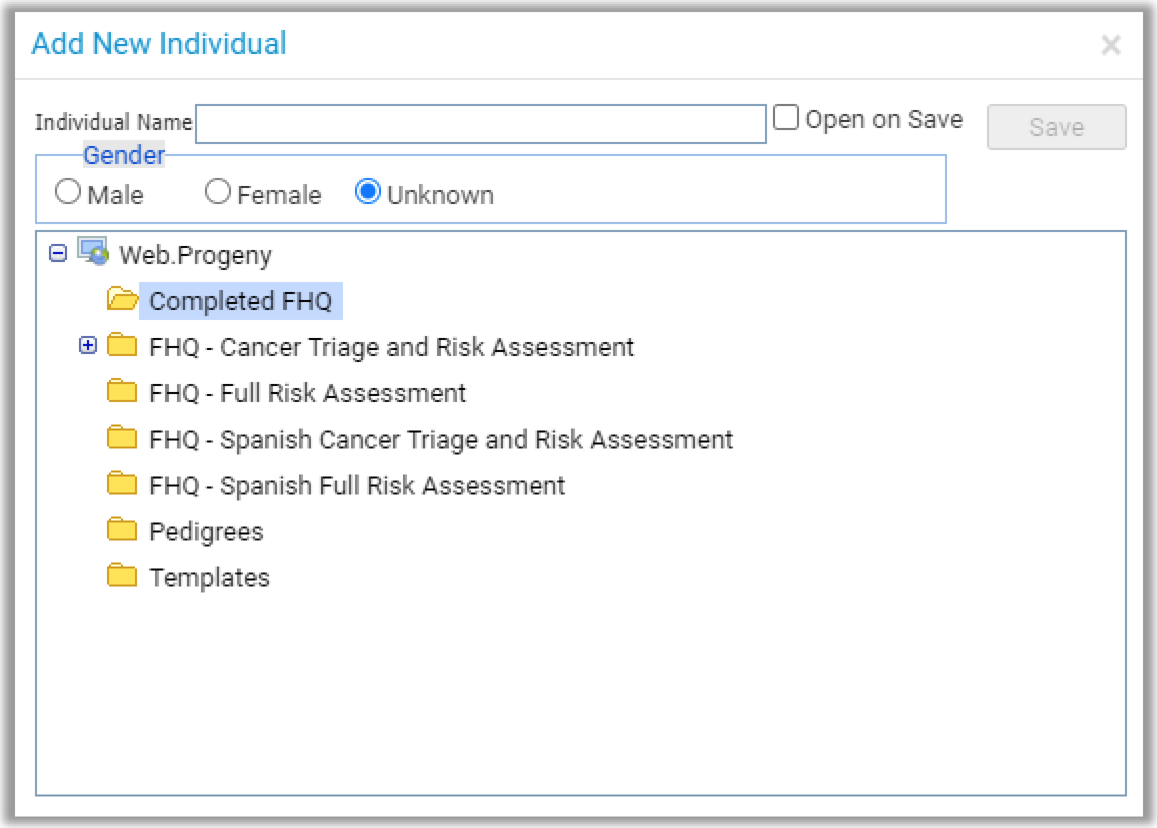


Creating Individuals

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 part of 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.

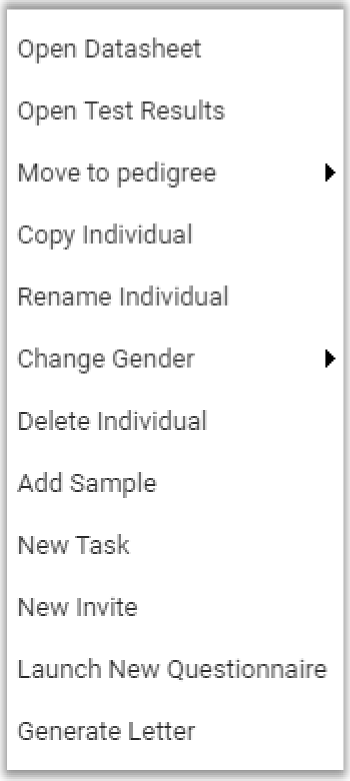
On the Individuals dashboard, click the New Individual button.

The Add New Individual dialogue box opens. Enter the name of the new individual, select the gender for the individual, then select the data folder to which the individual is being added. A message shows the individual was successfully created. You can also choose to open the individual's datasheet immediately after they are created.



Actions Menu

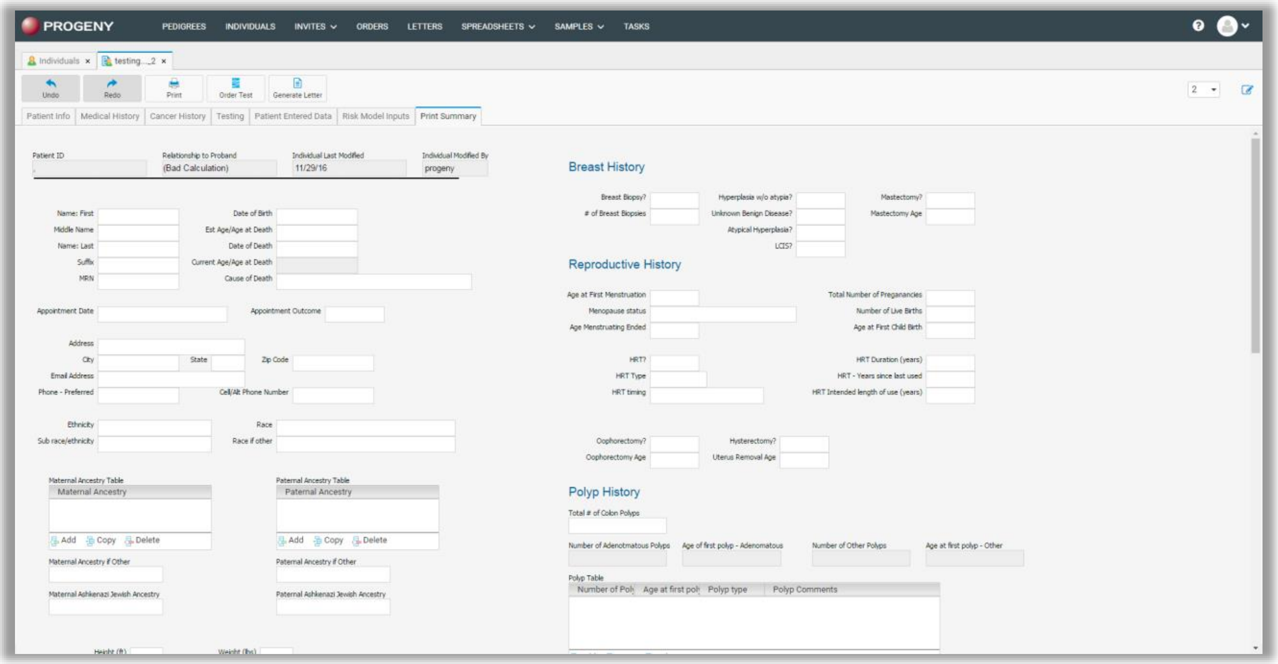
Some of the action menu items can only be shown for a Singlet individual as opposed to individuals already attached to a pedigree.



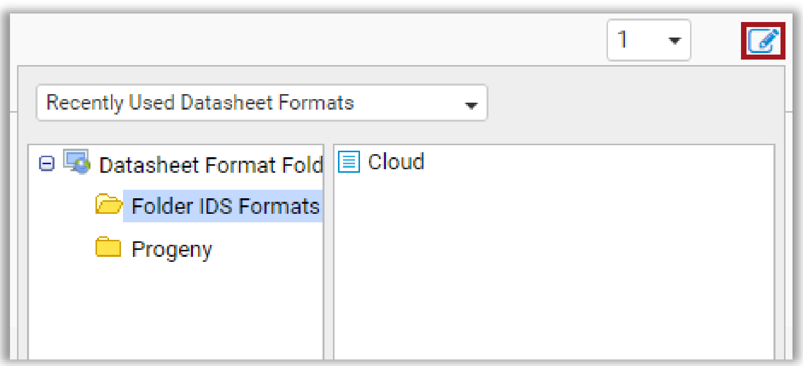
- **Open Datasheet** - opens the datasheet for the individual.
- **Open Test Results** - opens the Test Results for the individual.
- **Move to pedigree** - moves the individual to a pedigree.
    - **Existing Pedigree**
    - **New pedigree**
- **Copy Individual** - copies the individual.
- **Rename Individual** - renames the individual.
- **Change Gender** - changes the individual’s gender.
- **Delete Individual** - delete the individual from the database.
- **Add Sample** - adds a sample for the individual.
- **New Task** - creates a new task for the individual.
- **New Invite** - send a new invitation.
- **Launch New Questionnaire** - launches a new invitation for the individual where the clinician can complete it.
- **Generate Letter** - generates a letter for the individual.

Individual Datasheet Screen

The individual datasheet is used to enter and store information about individuals in the Progeny database. An Individual datasheet can have 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 (like 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. 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 this format.

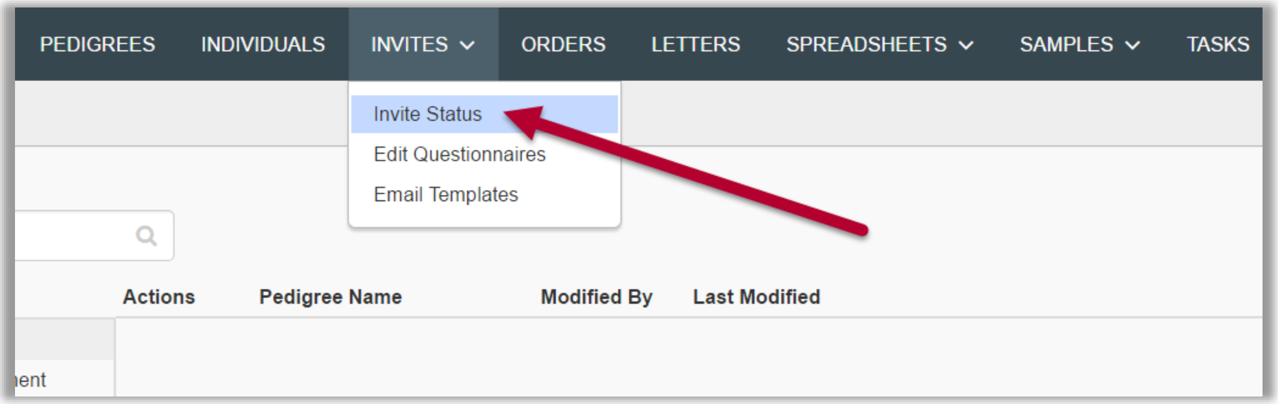
Data Field Types

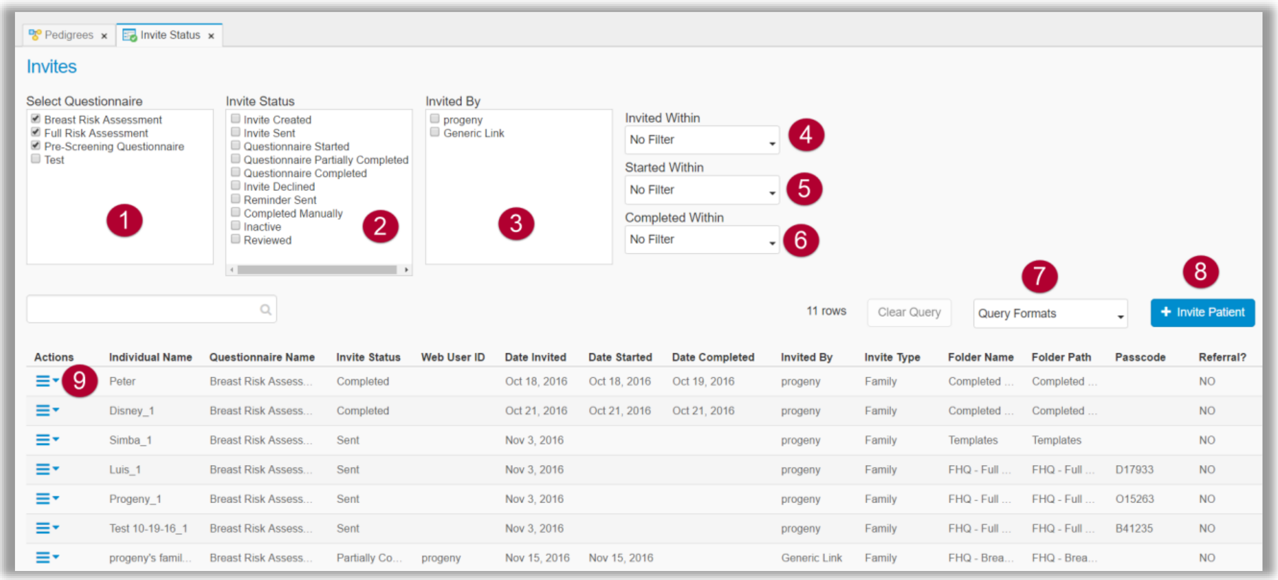
Progeny Web client does not allow users to create, change, or remove database fields. Configuring fields is an administrator function that must be managed in the Progeny Desktop client by a Progeny administrator. When an administrator creates a database field in the Progeny Desktop Client a field type is specified. The field type determines the type of data that a user can input 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 show Yes) or 0 (to show 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	Gives 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.
Table Summary	A computed field that summarizes the data for a given column in each table.
Hyperlink	Links to an external document, website, and so on.

Invites – Family History Questionnaire

Invite Status

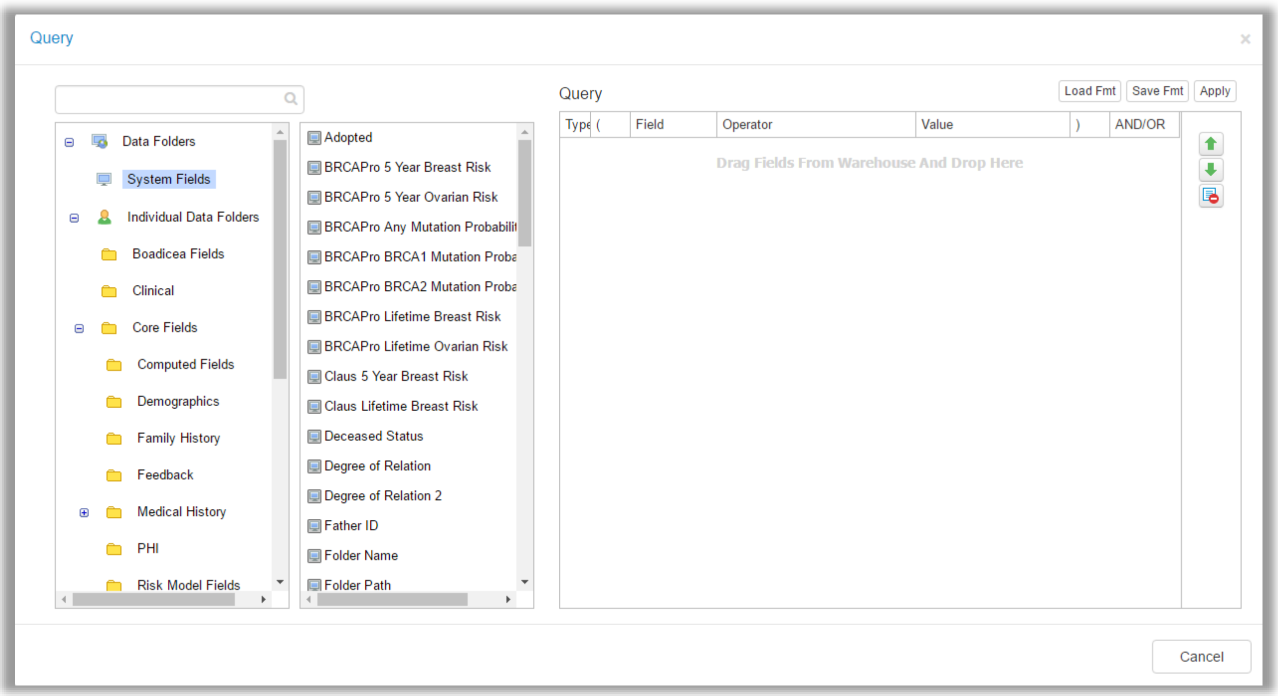




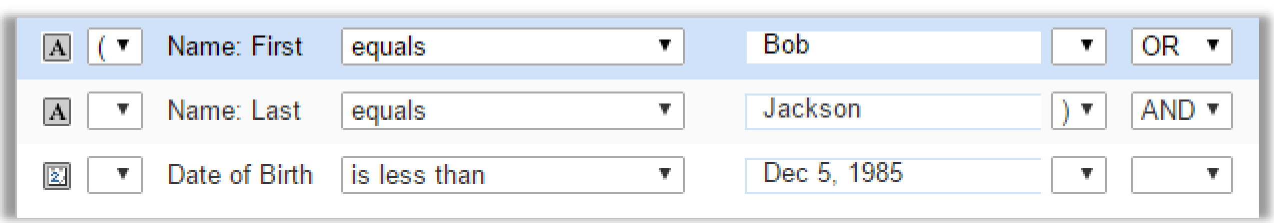
1. Select Questionnaire - Here you select the questionnaire(s) to view all invitations for the selected questionnaire(s) in the view pane at the bottom of the page.
2. Invite Status -You can sort the view of invitations to view invitations with the specified status.
    - **Invite Created** – the invitation 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 that was manually set to ‘Completed Manually’. Inactive - an invite status was set to ‘Inactive’.
- **Inactive** - an invite status that has been manually set to ‘Inactive’.
- **Reviewed** - an invite status that has been manually set to ‘Reviewed’.

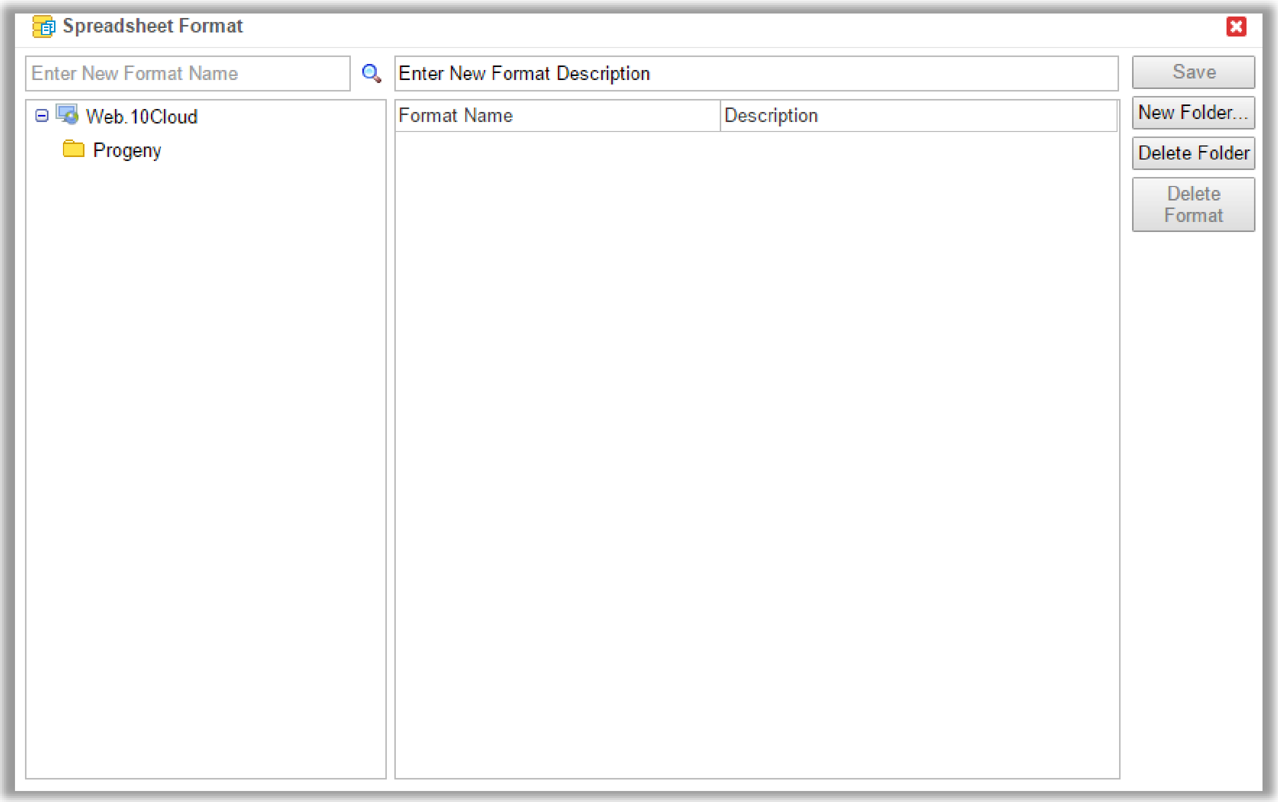
3. Invited By - Here you can sort the view of the invitations based on a specific user that sent the invitation.
4. Invited Within - You can filter the view of invitations by the number of weeks/days that the patient was invited within.
5. Started Within - You can filter the view of invitations by the number of weeks/days that the questionnaire was started within.
6. Completed Within - You can filter the view of invitations by the number 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.



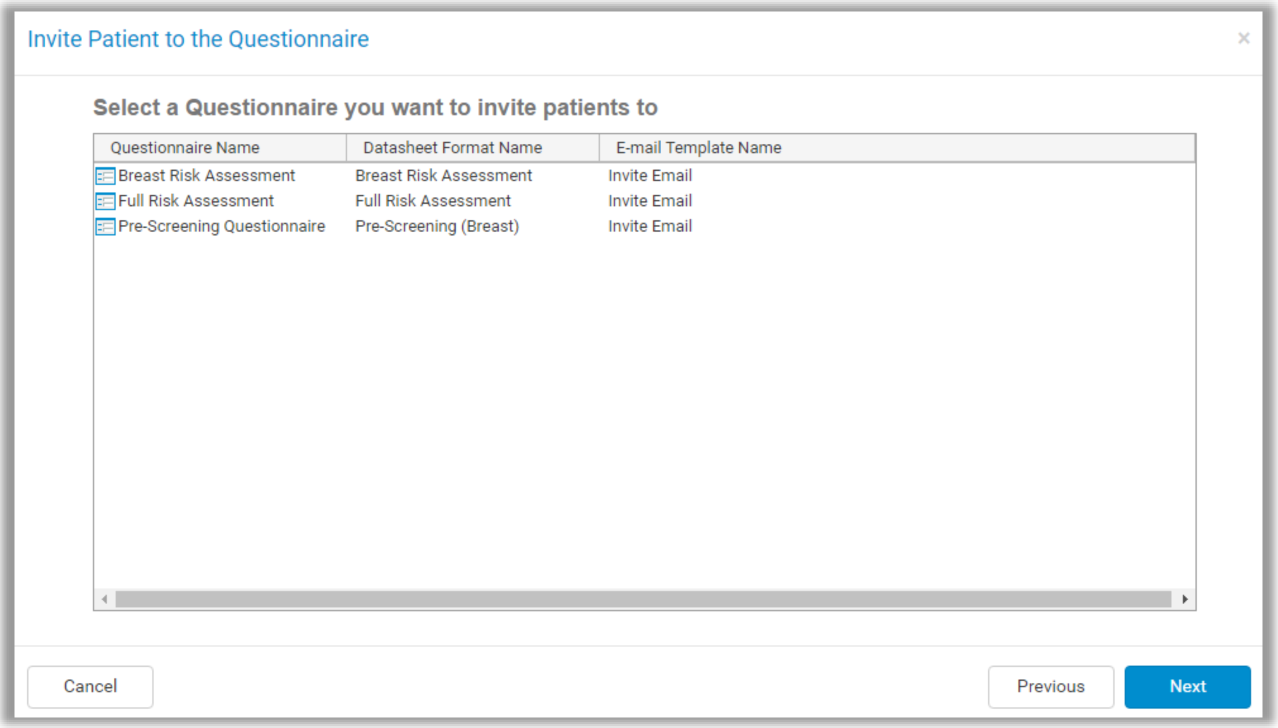
You can select any field in the database by using the folders in the left pane and then drag to drop the field into the right Query pane. Once you have the field in the Query pane, you can then specify the operator and value. This Query pane allows the creations of complex queries which can include multiple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

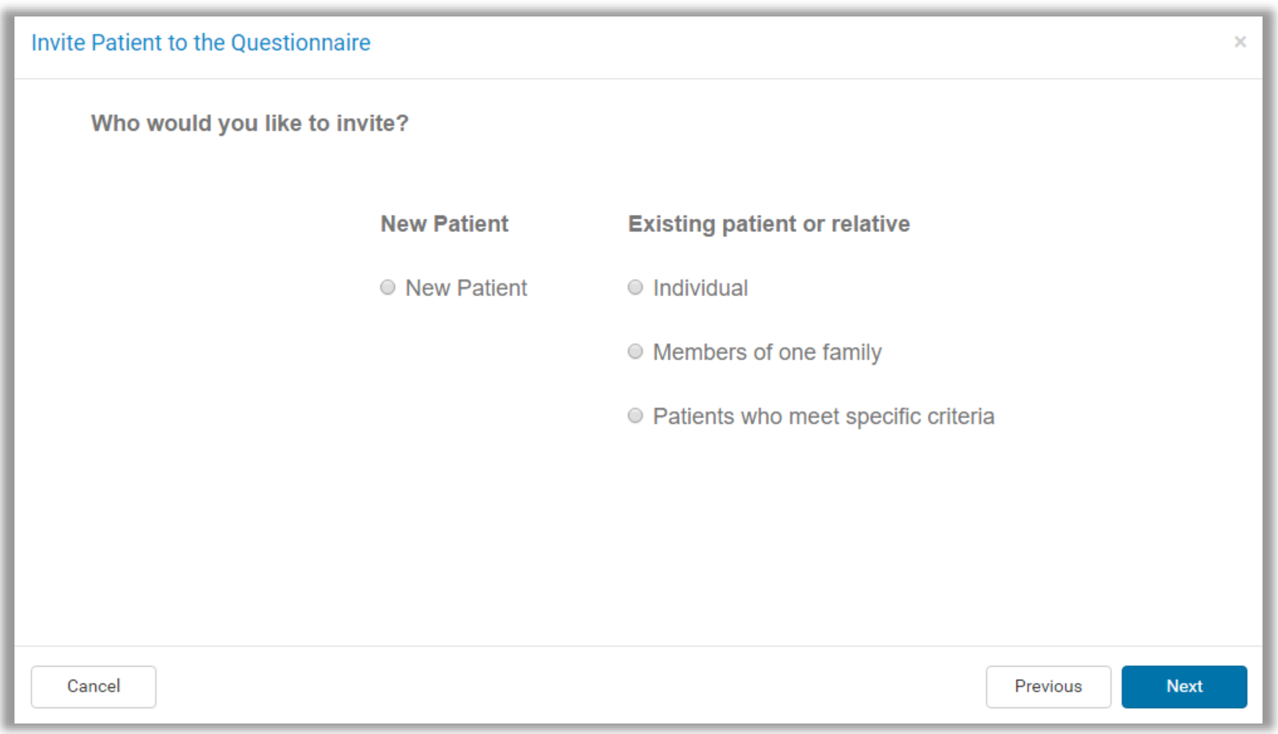


Once you are completed with specifying the query filter, you can then choose to save the format which will then open another window asking to select the folder to save the format in, give the format a name, delete a format from the selected folder, delete the selected format folder if it is empty, and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

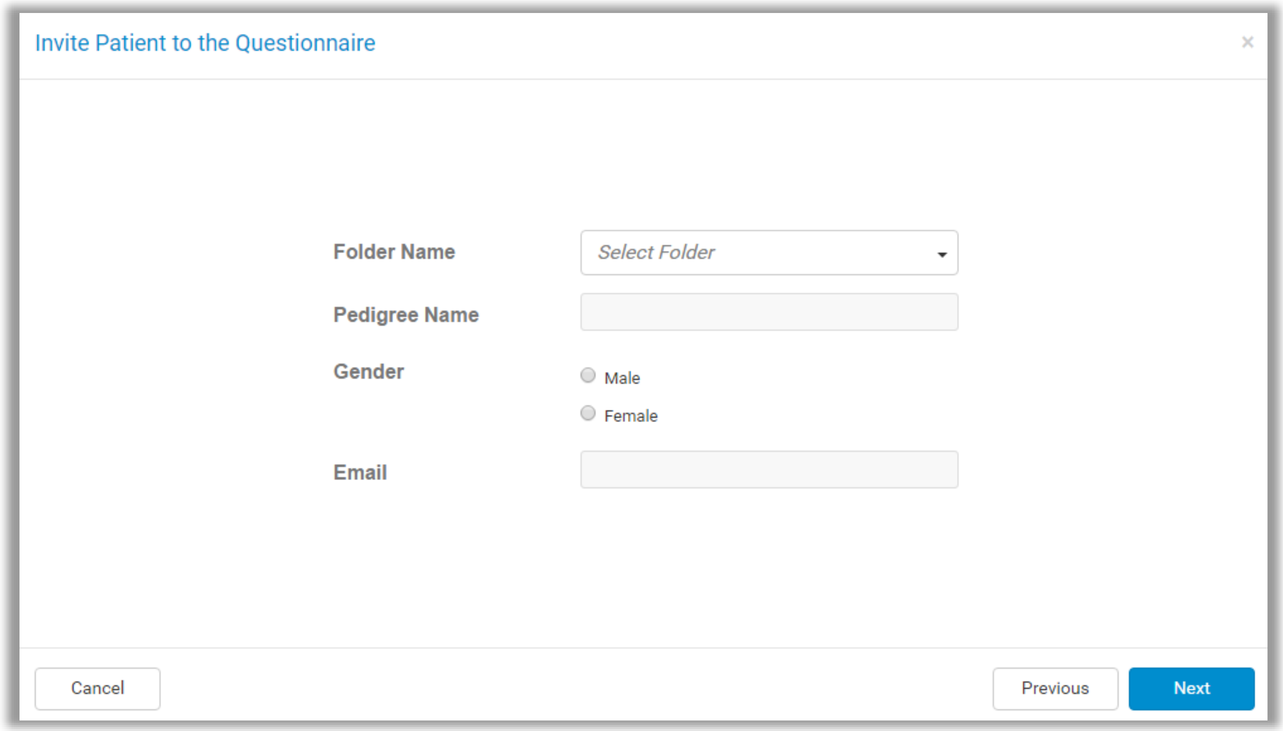


8. Invite Patient - Here you can click to invite a patient to fill out the FHQ. The first step would be to select which questionnaire to send to the patient.


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
Existing patient or relative
New Patient
Individual
Members of one family
Patients who meet specific criteria
Cancel
Previous
Next

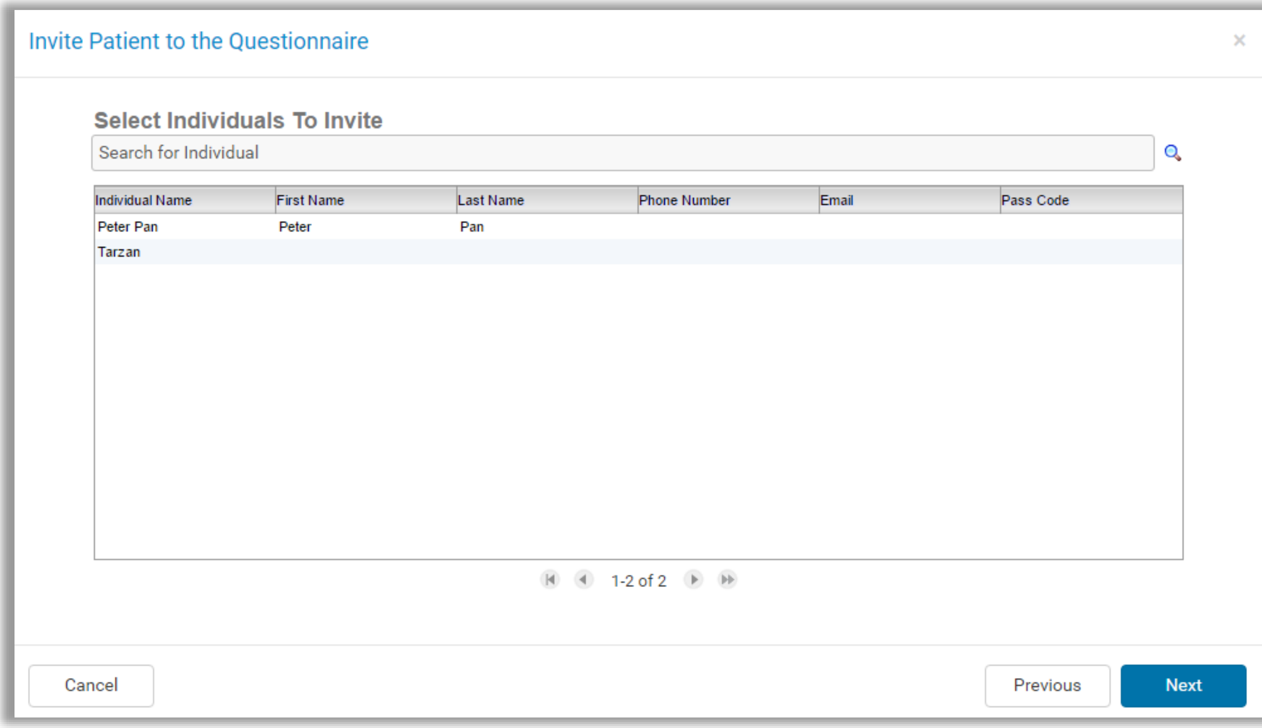
Invite new Patient – invites a new patient that is not in the Progeny database.
You will then be asked which folder to save the pedigree in, the name of the pedigree, the gender of the proband, and the email to send the questionnaire to.



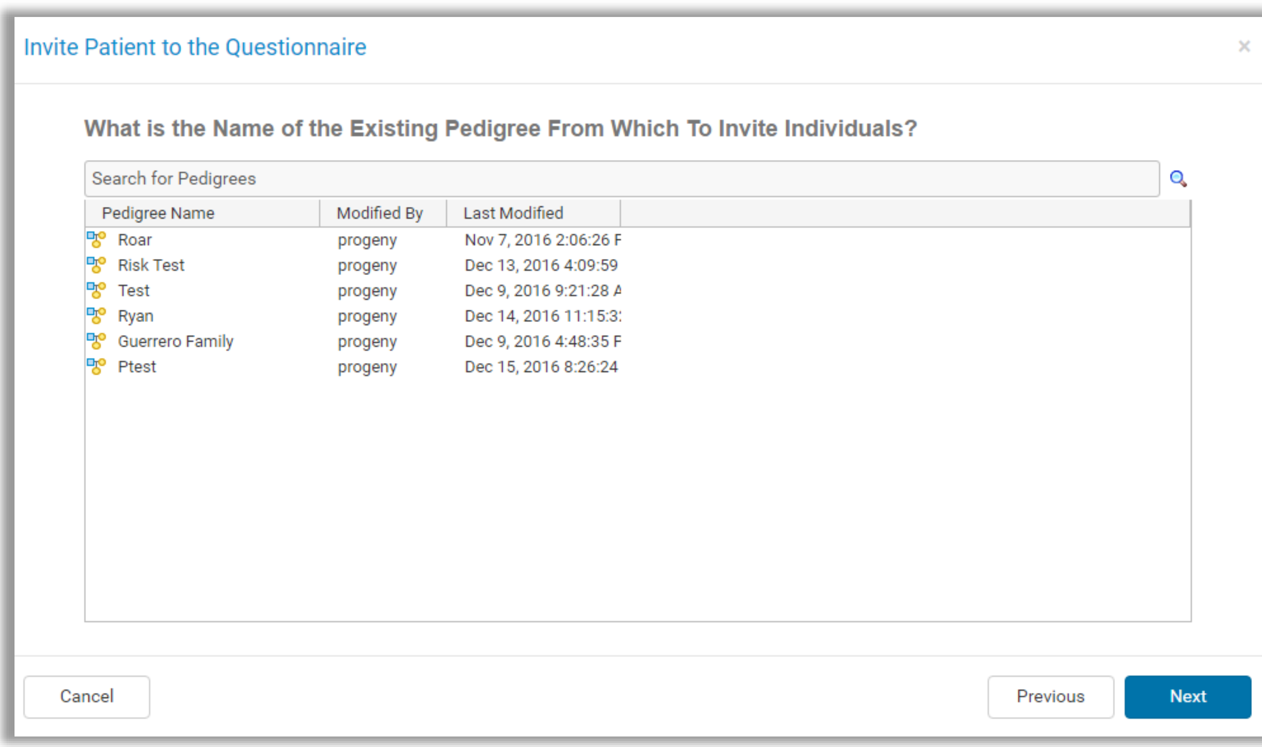
Invite Existing Patient or Relative – invites a patient or relative that is already in the database.

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.

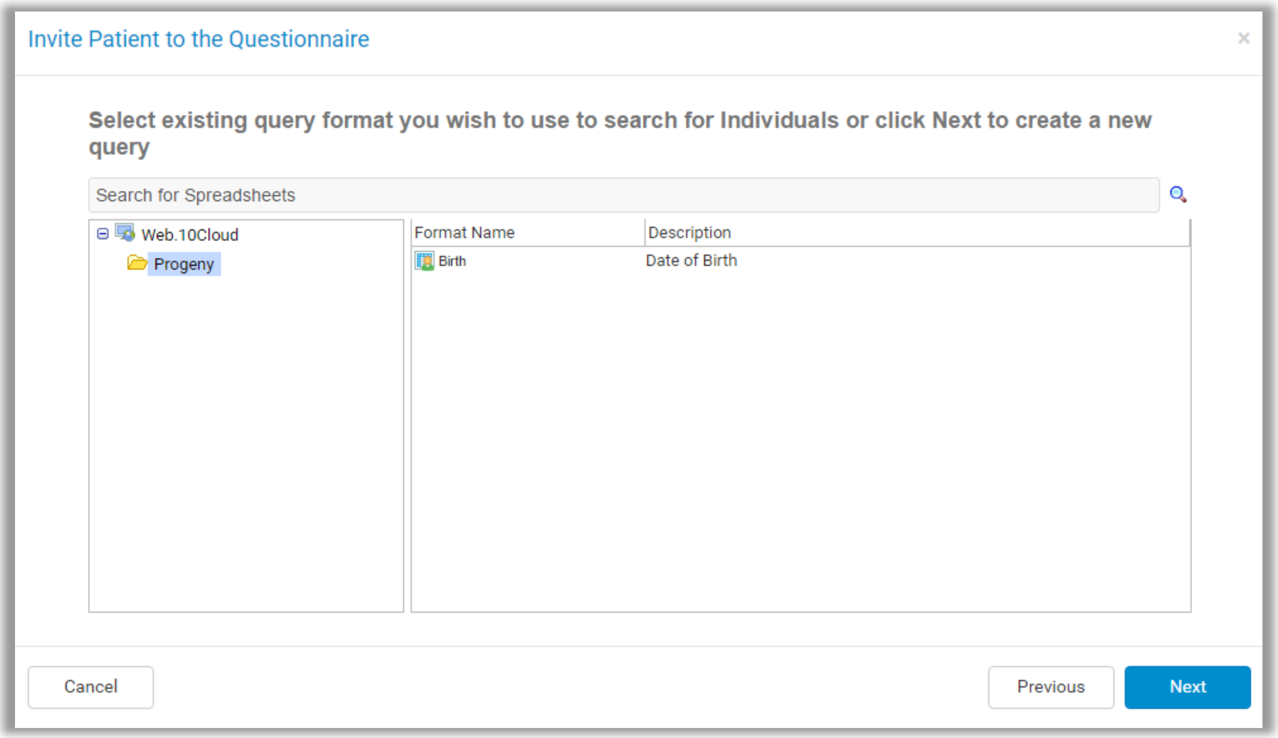
- **Individual** – an individual in the database that is not part of a pedigree, also called a singlet.



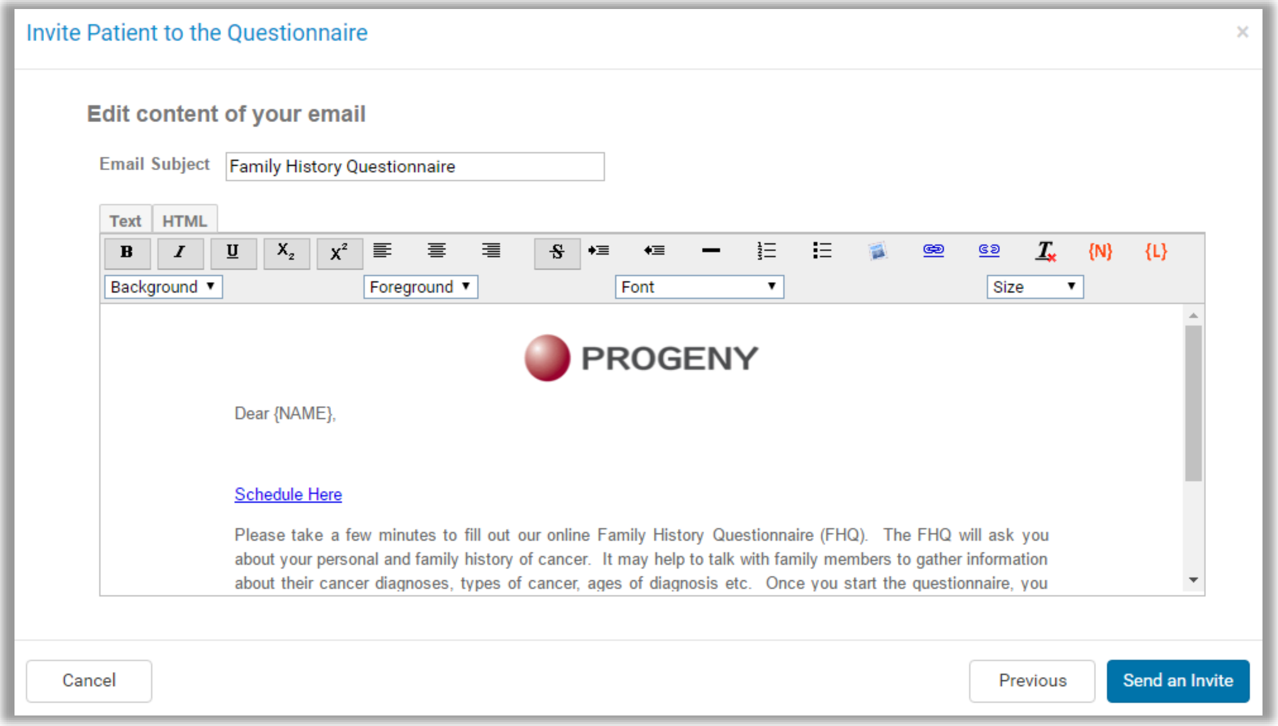
- **Members of one family** – here you can select a member of a family to be invited.



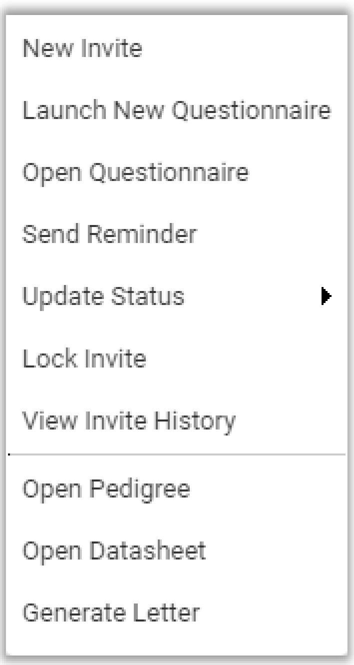
- **Patients who meet specific criteria** – here you can filter the database by the specified query so that you can invite patients that meet the criteria in the query. You would first select the query format, then update the query, if necessary, which will then display all individuals that match the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



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.



9. Actions Menu - The actions menu gives a quick way to perform common actions for the individual.

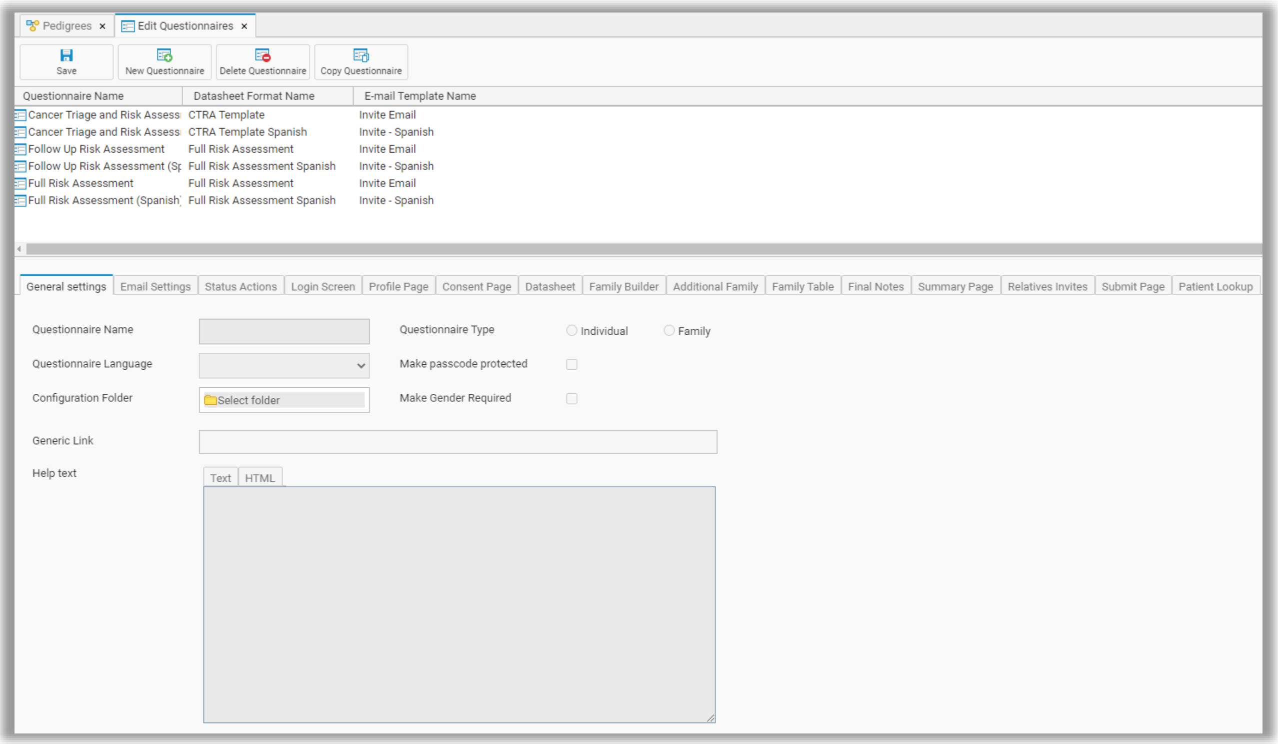


- **New Invite** – sends a new invitation to the individual.
- **Launch New Questionnaire** - launches a new questionnaire for the patient so that the clinician can complete it.

- **Open Questionnaire** - opens a specific questionnaire for the clinician to complete.
- **Send Reminder** – sends a reminder email to the individual.
- **Update Status** – manually change the status of the questionnaire to Completed Manually, Inactive, or Reviewed.
- **Lock/Unlock Invite** – locks/unlocks the invitation for the patient.
- **View Invite History** – shows a history log of the invite.
- **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** - 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 of the questionnaire.
    - **Questionnaire Type** – Individual questionnaires ask about the individual while family questionnaires ask about the family.
    - **Questionnaire Language** – the language of the questionnaire.

- **Make passcode protected** – enables a second factor for authentication in which a passcode is generated for the FHQ and must 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 needed for the questionnaire when being filled out.
- **Generic Link** – a 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 choice 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 number of reminders that can be automatically sent.
    - **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 to 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** – specifies who 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 of the login page.
    - **Login Page Instructions** – instructions on the login page.
    - **Sign Up Page Instructions** – instructions on 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 of the profile page.
    - **Datasheet Format Name** – the datasheet format for the profile page.

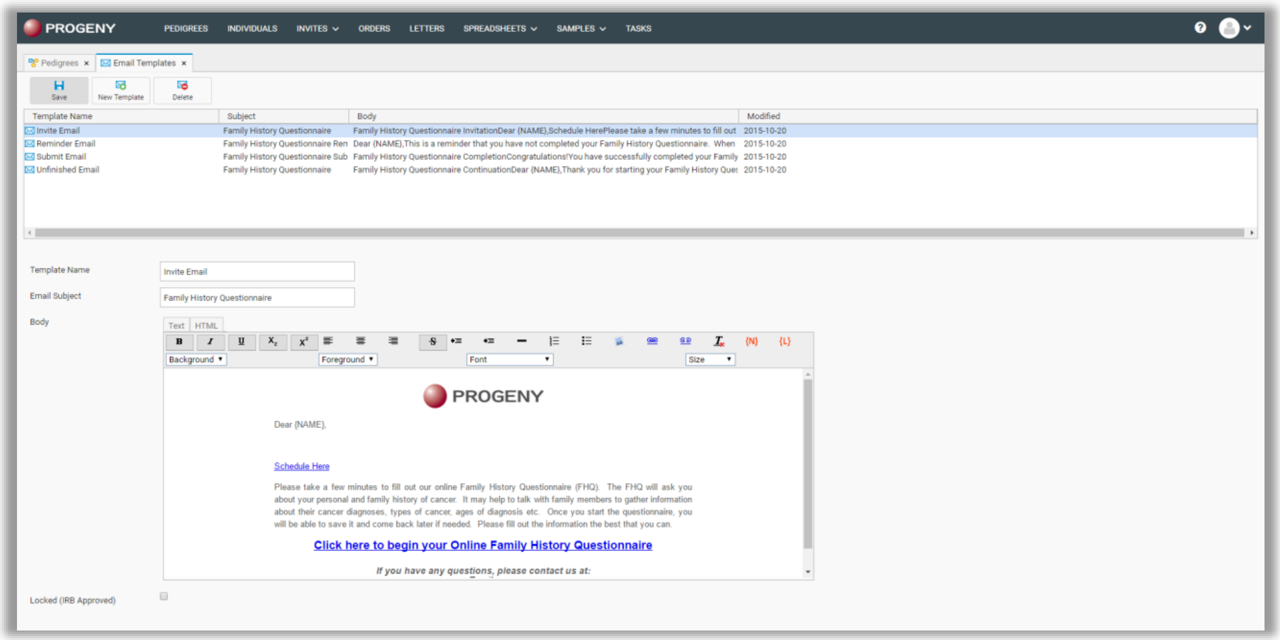
10. **Consent Page**
    - **Add Consent Page** – specifies if the consent page will be added to the questionnaire.
    - **Consent Page Title** – the title of the consent page.
    - **Datasheet Format Name** – the datasheet format for the consent page.
11. **Datasheet**
    - **Datasheet Page Title** – the title of 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 of 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 of 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 of the Half-Siblings page.
    - **Half-Siblings Page Instructions** – instructions for the Half-Siblings Page.
14. **Family Table**
    - **Family Table Page title** – the title of 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 enable changing information on the summary page.
    - **Summary Page title**- the title of the Summary page.
    - **Summary Page Instructions** – the instructions on the Summary page.

- **Empty Summary Page title** – the title of 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 of 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 at once.
    - **Use email template** – uses the specified email template for relatives.
    - **Invite to Questionnaire** – specifies the questionnaire to be sent to the relatives.
18. **Submit Page**
    - **Submit Page Title** – the title of the Submit page.
    - **Submit Page instructions** – the instructions on 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.
    - **Run risk on submit** - runs the specified risk models and saves the results for the patient.
19. **Patient Lookup -** enables the ability for patients to look up their account and continue with their questionnaire.
    - **Patient Lookup Title** - the title for the Patient Lookup page.
    - **Unique Patient ID** - the unique value to identify patients.
    - **Unique Patient ID Display Heading** - a custom name for the unique value field.
    - **Date of Birth** - the date of birth field.
    - **Date of Birth Display Heading** - a custom name for the Date of birth.
    - **Allow Patient to Create New Records** - allows patients to create a new questionnaire profile.
    - **Patient Lookup Link** - the URL for the patient lookup page.

Email Templates

This is where all the email templates are saved.



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 patients submit questionnaires.
- **Unfinished Email** – the template that is used when a questionnaire has not been completed.
- **Reminder Email** – the template that is used when a reminder email is sent for a questionnaire.

There are also more 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** – removes an email template.

Orders

Progeny has integrated the ability to order genetic tests from Ambry Genetics through Ambry Port. 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 cuts the necessity to switch to another application for these tasks.

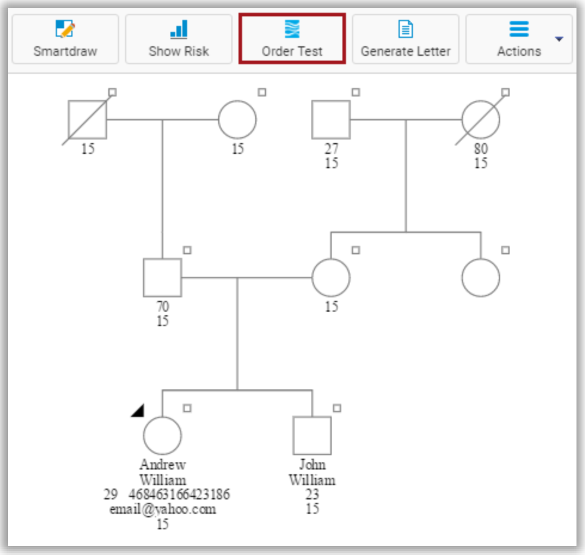
Registering

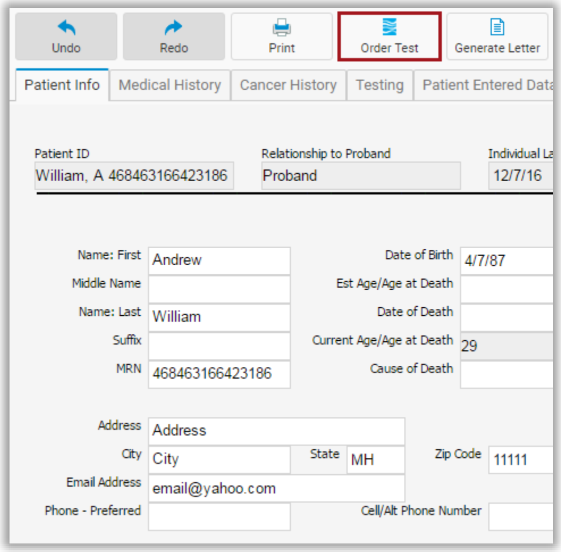
To be able to use the order feature, clinicians need to complete a brief registration form at http://www.progenygenetics.com/support/ambryorder, shown below:

Within a day you will receive credentials for ordering genetic tests from within Progeny.
Please contact Progeny Support at support@progenygenetics.com for help entering your credentials into Progeny.

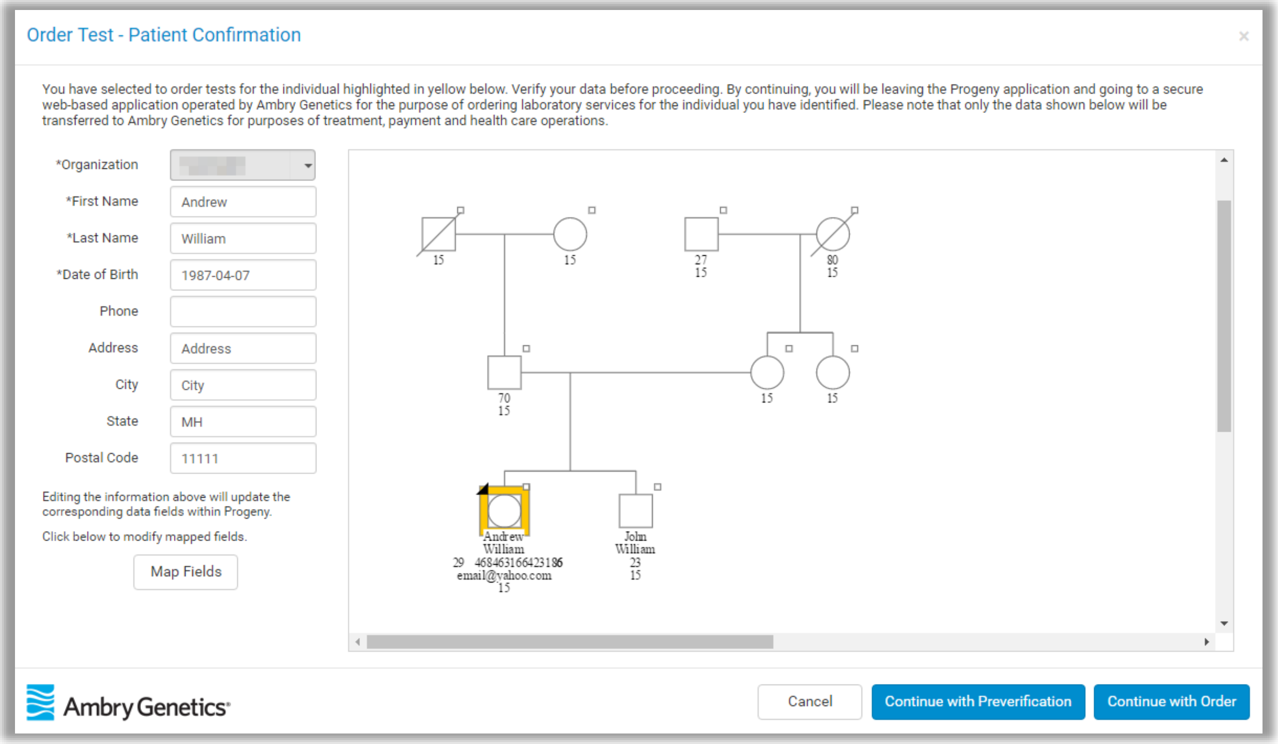
Ordering Genetic Tests

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.





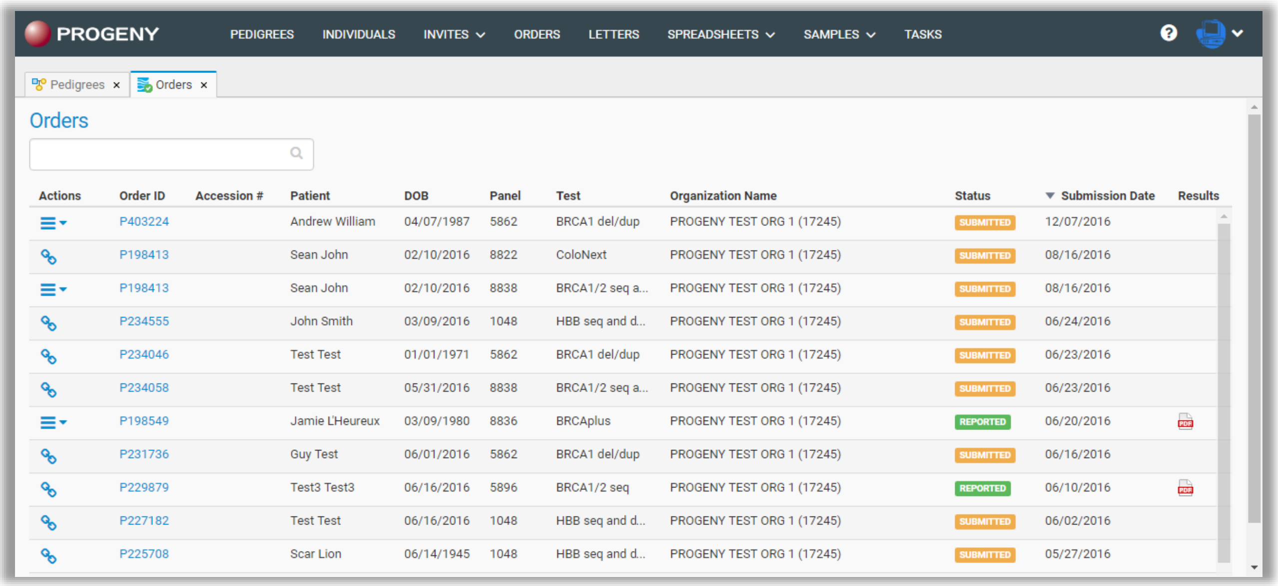
The selected individual's information will be populated into the mapped fields and a current view of the pedigree, which will go with the **Test Request Form** (TRF), will be displayed.



To help in expediting insurance processing, click the **Continue with Preverification** button and complete the requested information. The Ambry Insurance Verification Department will verify the benefits status 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.

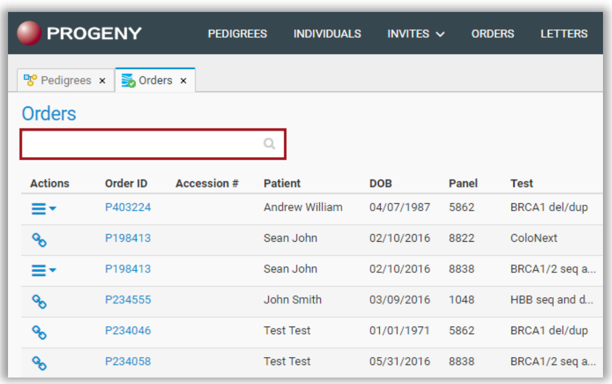
Order Status

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.



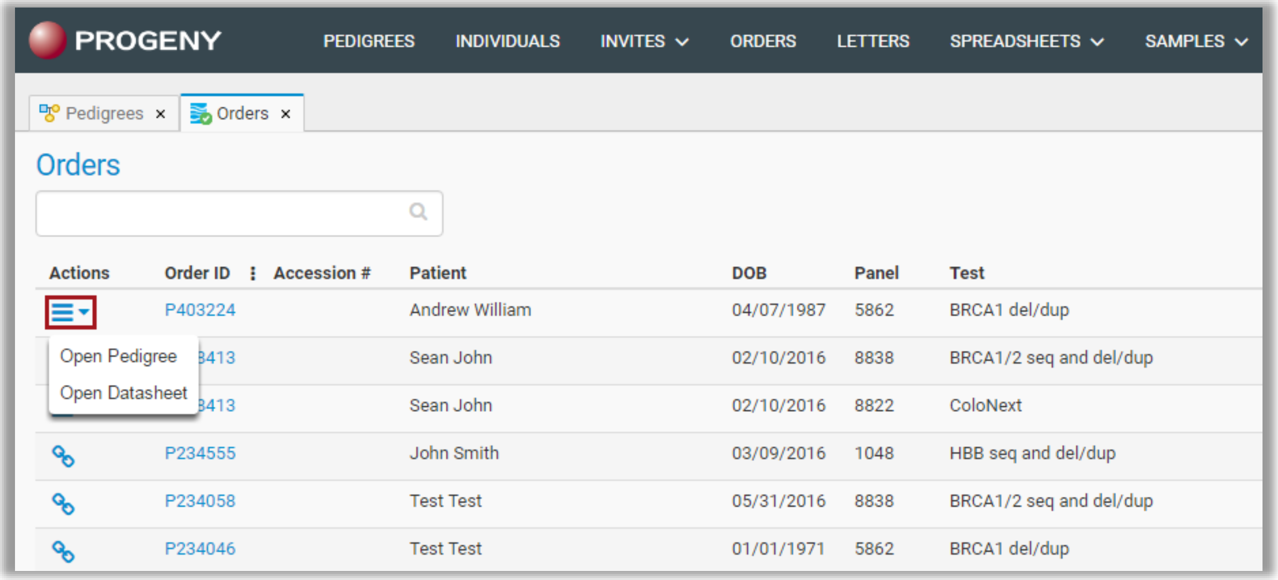
Smart Search

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.



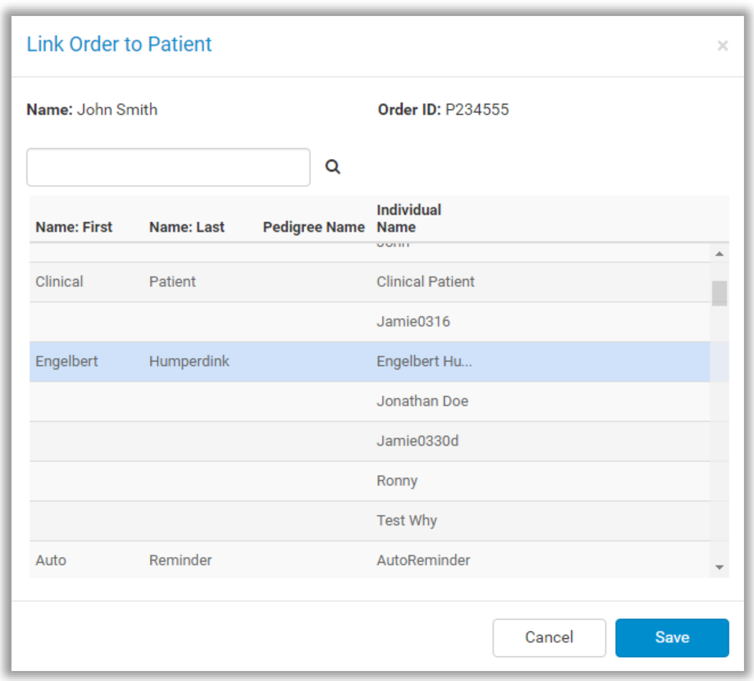
Actions Menu

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



Link Order to Patient

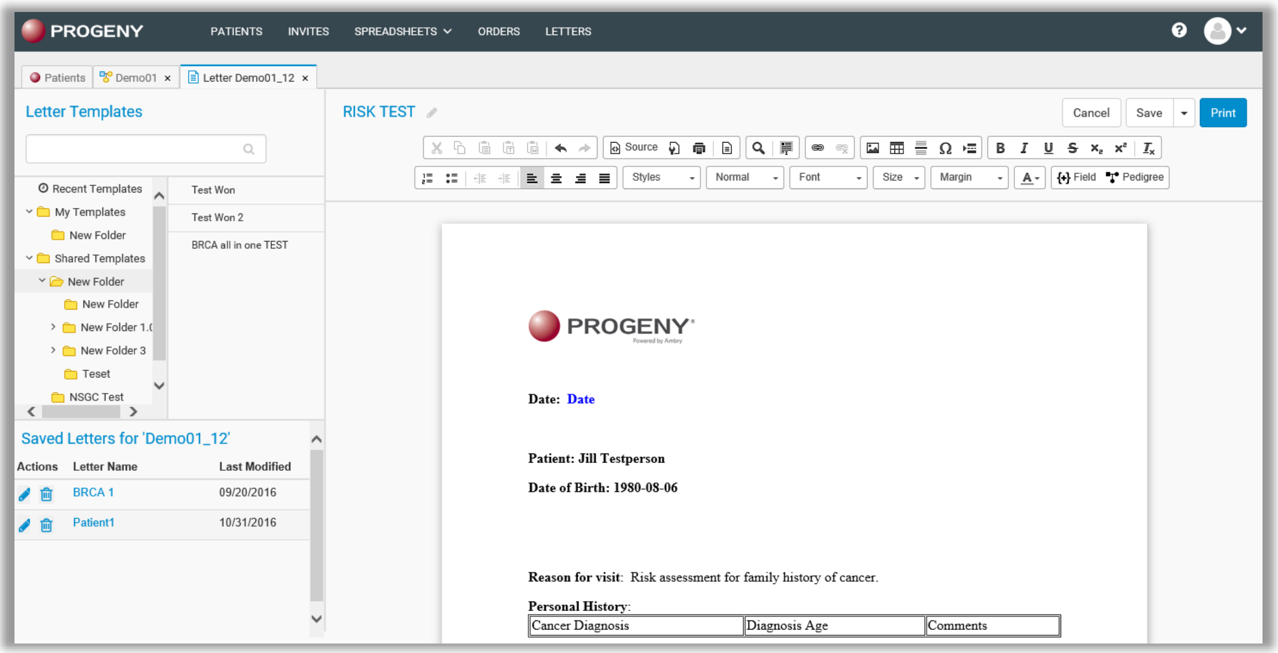
Link Order to Patient, accessed by clicking the link icon in the Actions column, allows you to link orders not placed through Progeny with patients in your database.



Letters

Creating a New Letter Template

The Letters choice on the navigation toolbar opens a Letter Templates tab. Here you can create, edit, and remove customized Letter Templates. The templates use an extensive editor that allows you to implement a variety of assorted styles, special characters, images, and links. Progeny also has two custom buttons in the editor: **Field** and **Pedigree**. The **Field** button 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 changed and saved to a specific individual.



Letter Generator Buttons

	Cut - removes and copies the choice to the clipboard (Ctrl + X)
	Copy - copies selection to clipboard (Ctrl+C)
	Paste - pastes contents of the clipboard
	Paste as plain text - pastes contents of the 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 the 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 the cursor is placed in a link or part of a link is selected
	Image - displays window that allows the 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
Ω	Insert Special Character - displays a window that allows the choice of symbols 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
	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 having the cursor by one tabulator length.
	Increase Indent - increases the indentation of a block-level element having 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.

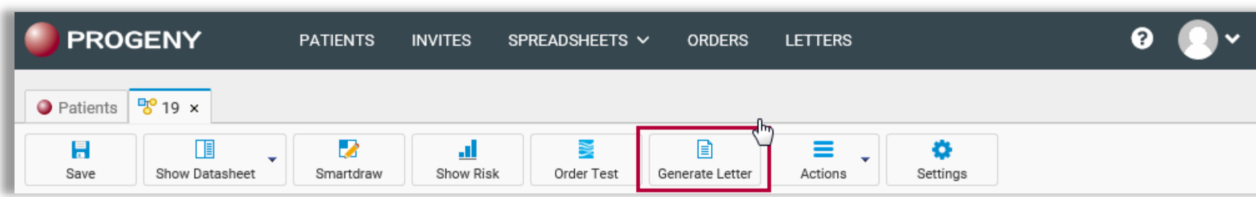
	Align Right - aligns paragraph with the right margin and rags text on the left side.
	Justify - aligns paragraph with the right margin and rags text on the left side.
Normal	Paragraph Format - allows the choice of several pre-defined block-level styles from a drop-down list.
Arial	Font Name - allows the choice of several typefaces that are applied to text.
16	Font Size - allows the choice of several font sizes that change how big or small the text is
0.00	Paragraph Margin - allows the choice of several line spacing margins that change how much space is between each line in a paragraph
A	Text Color - allows the choice of several colors for text
A	Background Color - changes the background color of the text.
{+} Field	Add Field - displays a Field Chooser window that allows adding field placeholders from the database
Pedigree	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.

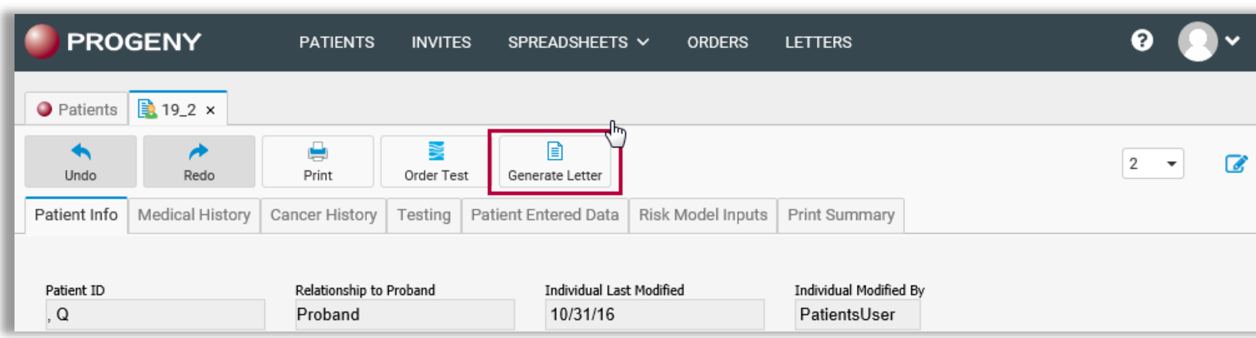
Pedigree Viewer

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



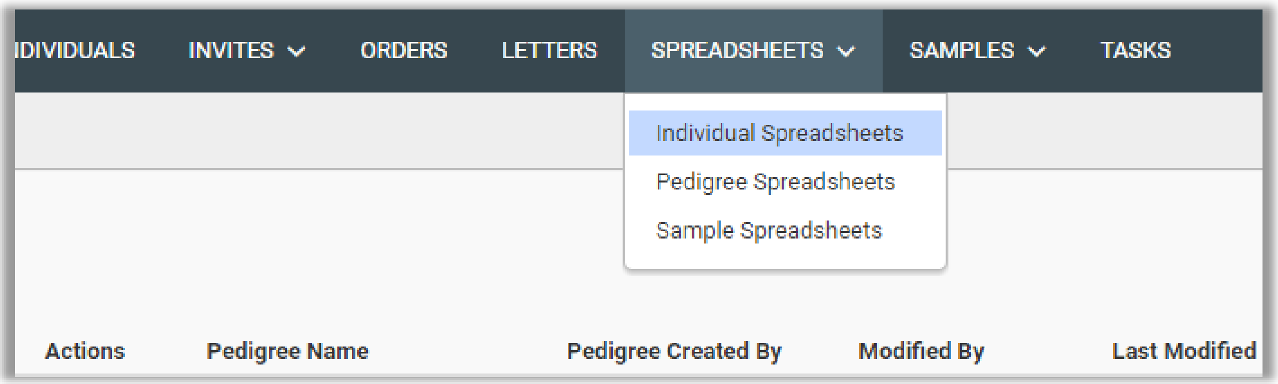
Individual Datasheet

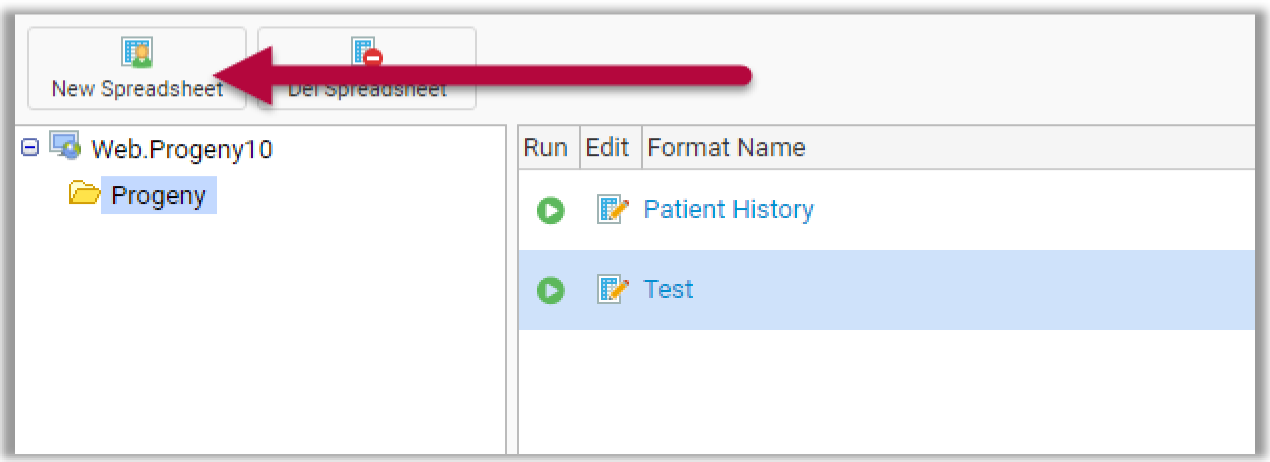
Click the Generate Letter button on the Individual Datasheet toolbar menu.



Spreadsheets and Queries

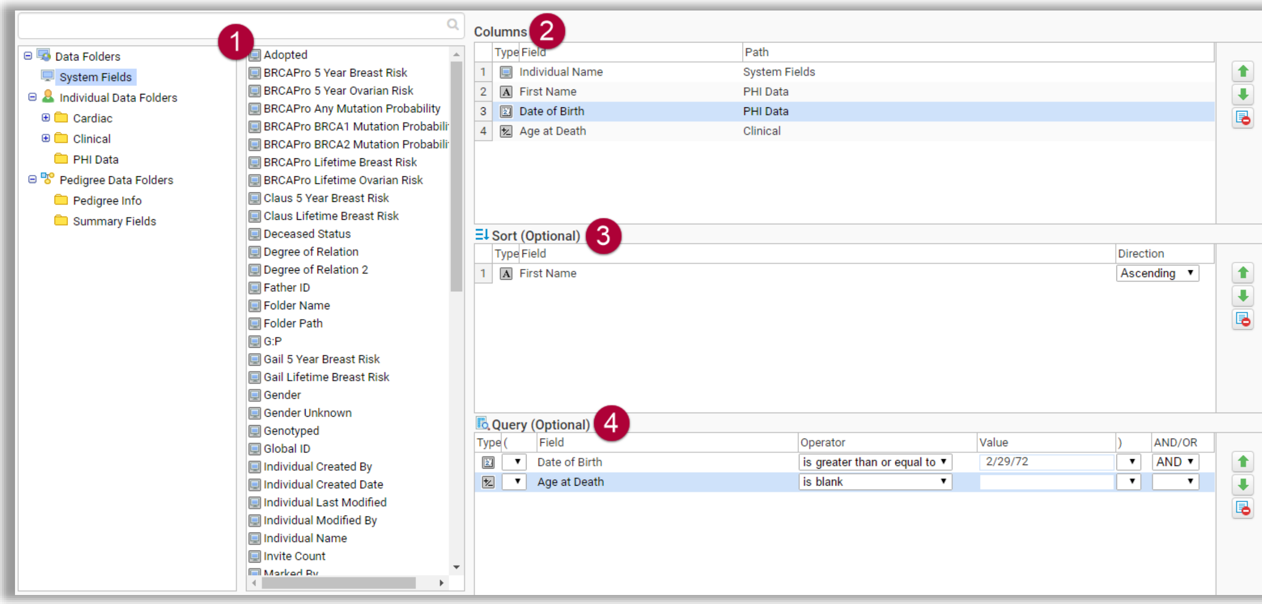
Spreadsheets and Queries are used for searching for specific field data and displaying the results in a spreadsheet. You can search either your Individual level fields, Pedigree level fields, or Sample level fields.





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 part 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., the Last Name equals Smith.

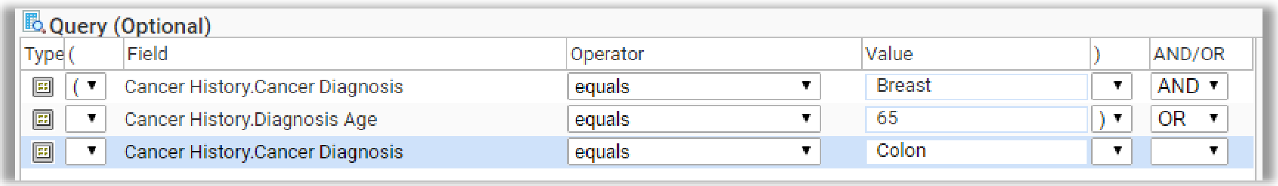
Building Queries

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 to be shown on the spreadsheet results - You can use the search field to quickly find the field you are looking for. Just type in any part 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 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 multiple fields. The first field will be the primary column to sort by, 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 conducted 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.



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:

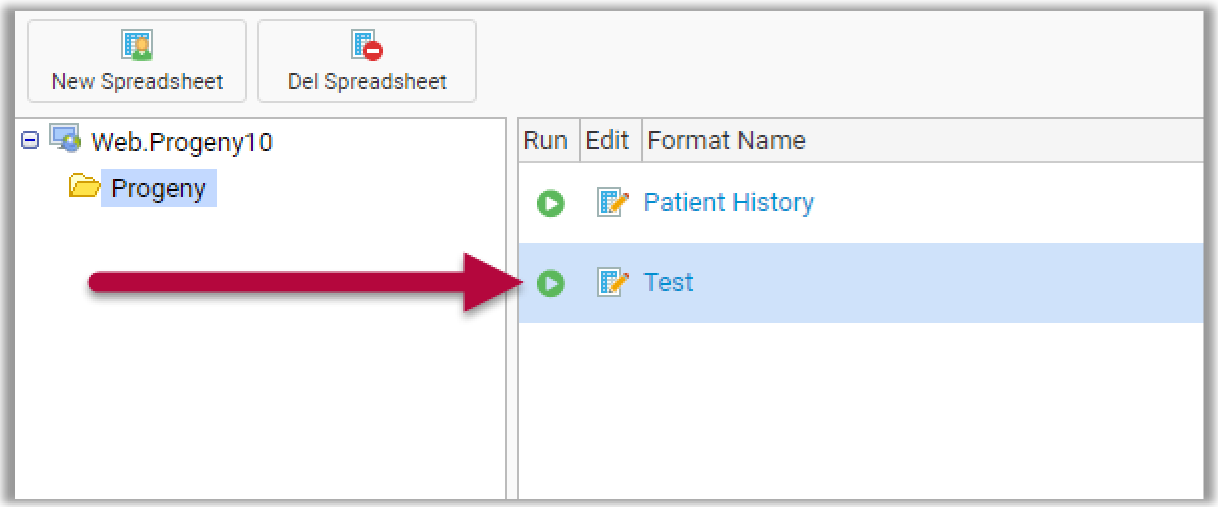
Operator	Description
begins with	Search for an item where the specified field has data that begins with the search criteria. For example, if the query field for individuals is the Weight field, and you specify Weight begins with 17, then only those individuals for whom the weight begins with a 17 (17 or 170-179) are returned in the search.
contains	Search for an item where the specified field has an instance of the search criteria. For example, if the query field for individuals is the Weight field, and you specify Weight has 75
does not begin with	Search for an item where the specified field has 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 have any instance of the search criteria. For example, if the query field for individuals is the Weight field, and you specify Weight does not have 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 has 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 ≠ 175, then only those individuals whose weight does not equal 175.
ends with	Search for an item where the specified field has 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 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 a .csv file into a query of this type.
is blank	Search for an item where the specified field has absolutely no data. For example, if the query for individuals is the Weight field, and you specify Weight is blank, only those individuals for whom data has not been inputted the Weight field are returned in the search. Note: A zero (0) is an actual data value. This means that if zero (0) has been entered in 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 ≥ 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

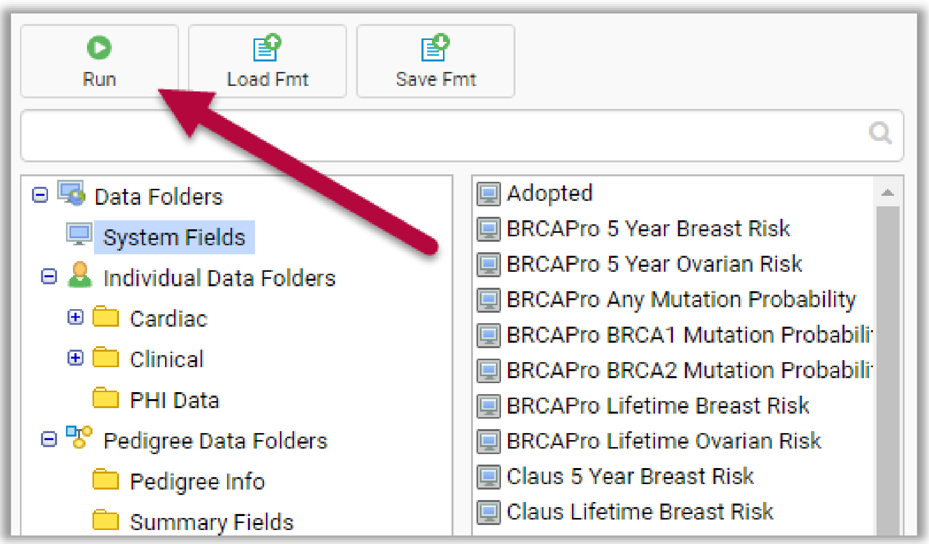
	Weight field, and you specify Weight ≤ 175, then those individuals whose weight is exactly 175 or less are returned in the search.
is not blank	Search for an item where the specified field has any valid data. For example, if the query field for individuals is the Weight field, and you specify Weight is not blank, all individuals for whom data has been entered in the Weight field are returned in the search. Note: A zero (0) is an actual data value. This means that if zero (0) has been entered in 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 in 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 a .csv file into a query of this type.
is not 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 show 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 not like 75, select "is not like" as the operator and enter %75 in the Value field. The % shows 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 show 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 % shows 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.

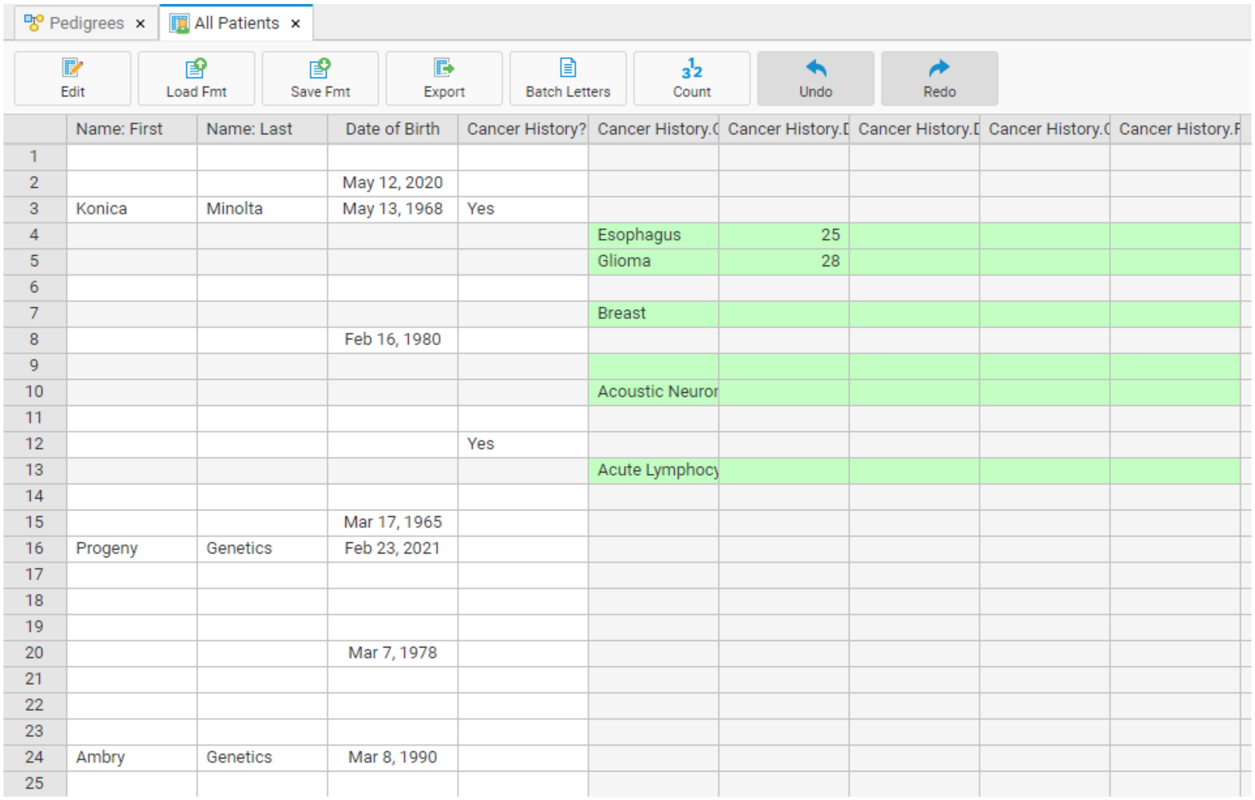


Or by clicking “Run” in the upper left while changing the Spreadsheet.



Results View

After the spreadsheet is ran, you will then see the results. At the top of the results, you will see some additional buttons for different actions.



	Name: First	Name: Last	Date of Birth	Cancer History?	Cancer History.C	Cancer History.D	Cancer History.D	Cancer History.C	Cancer History.F
1									
2			May 12, 2020						
3	Konica	Minolta	May 13, 1968	Yes					
4					Esophagus	25			
5					Glioma	28			
6									
7					Breast				
8			Feb 16, 1980						
9									
10					Acoustic Neuror				
11									
12				Yes					
13					Acute Lymphocy				
14									
15			Mar 17, 1965						
16	Progeny	Genetics	Feb 23, 2021						
17									
18									
19									
20			Mar 7, 1978						
21									
22									
23									
24	Ambry	Genetics	Mar 8, 1990						
25									

- Edit - edits the current format.
- Load Fmt - loads a different spreadsheet format.
- Save Fmt - saves the current spreadsheet format.
- Export - export the spreadsheet results into another format.
  - Settings - format for the type of file/format to export the results in
    - Text (Tab Delimited) - text file with a tab separator between the data.
    - Text (Comma Delimited) - text file with a comma separator between the data.
    - Text (Other) - text file with a custom data separator.
    - Excel (xls) - old excel format.
    - Excel (xlsx) - new excel format.
  - Newline Handling for Text Fields - only applies when exporting into a Text file format.
    - Retain newlines in formatted cells - when a text field has data where there are line breaks, spaces, or tabs, this keeps the data as a single data point. Ex. Progeny Genetics will be kept as “Progeny Genetics” in the exported file.
    - Convert newlines to spaces - converts the line breaks to spaces in the file output.
    - Export newlines without any formatting - exports the dataset including line breaks, as is.
  - Options
    - Include Column Headings - includes the field names in the export.
    - Export Table Rows Only - exports only the table data.

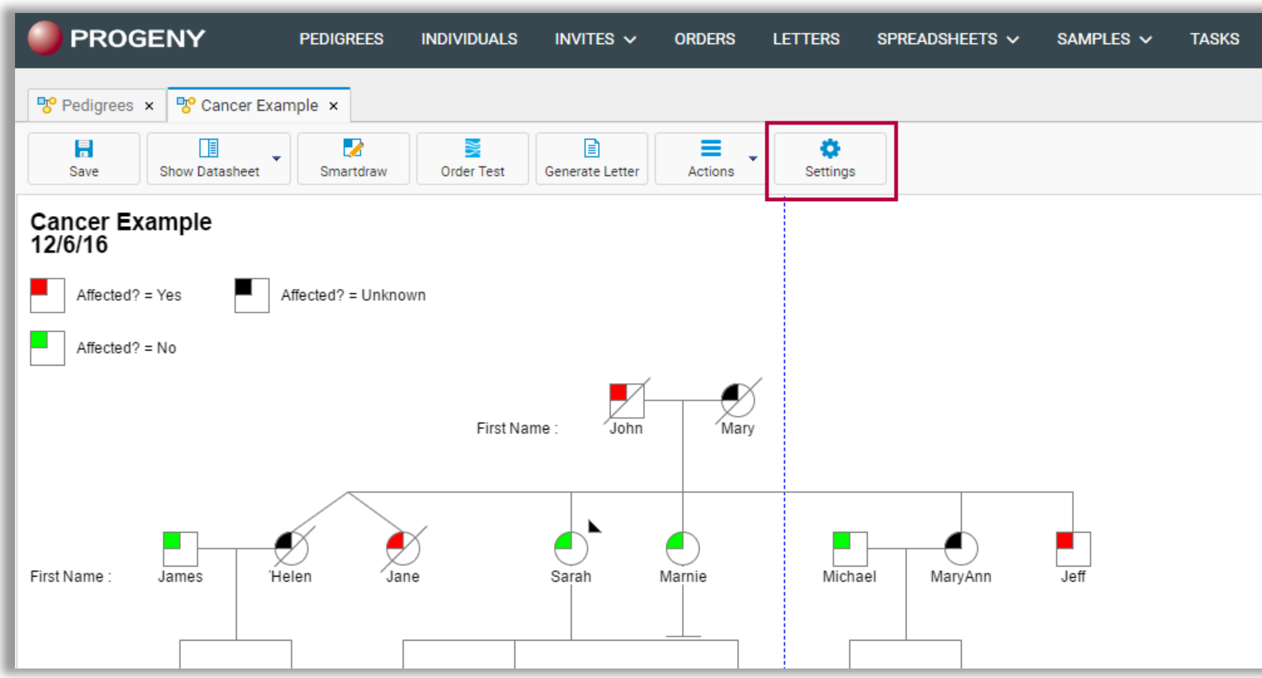
        - Export One Row Per Individual - exports one row per individual, even when there are multiple rows due to multiple table rows.
- Batch Letters - generates letters for all the individuals in the result. This brings you to the Letters module to select the letter template.
- Count - counts the number of individuals in the result.
- Undo - undo the last change made in the results view.
- Redo - redo the last change made in the results view.

Formats

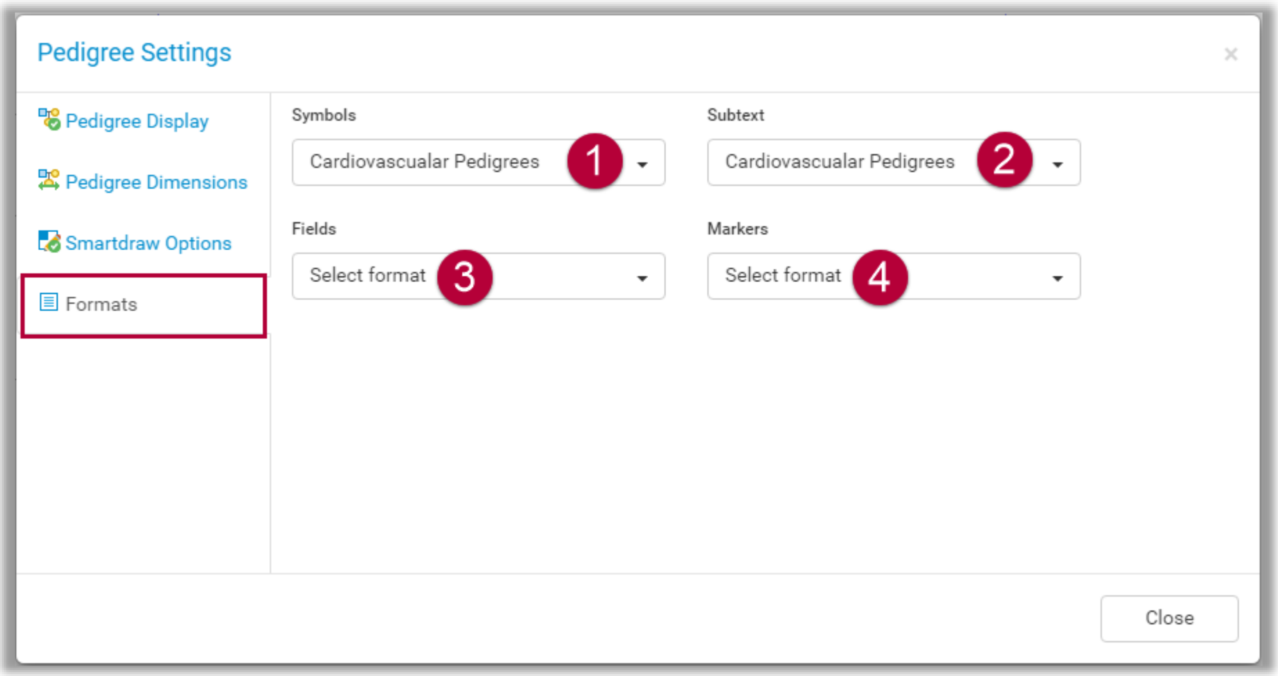
After an administrator has configured the necessary templates for datasheets, subtext, and icons, each configuration can be saved as an individual format. Retrieve this saved format by selecting it in the following ways:

Pedigrees

From the Pedigree canvas, select Settings.



Then select Formats in the window that opens.

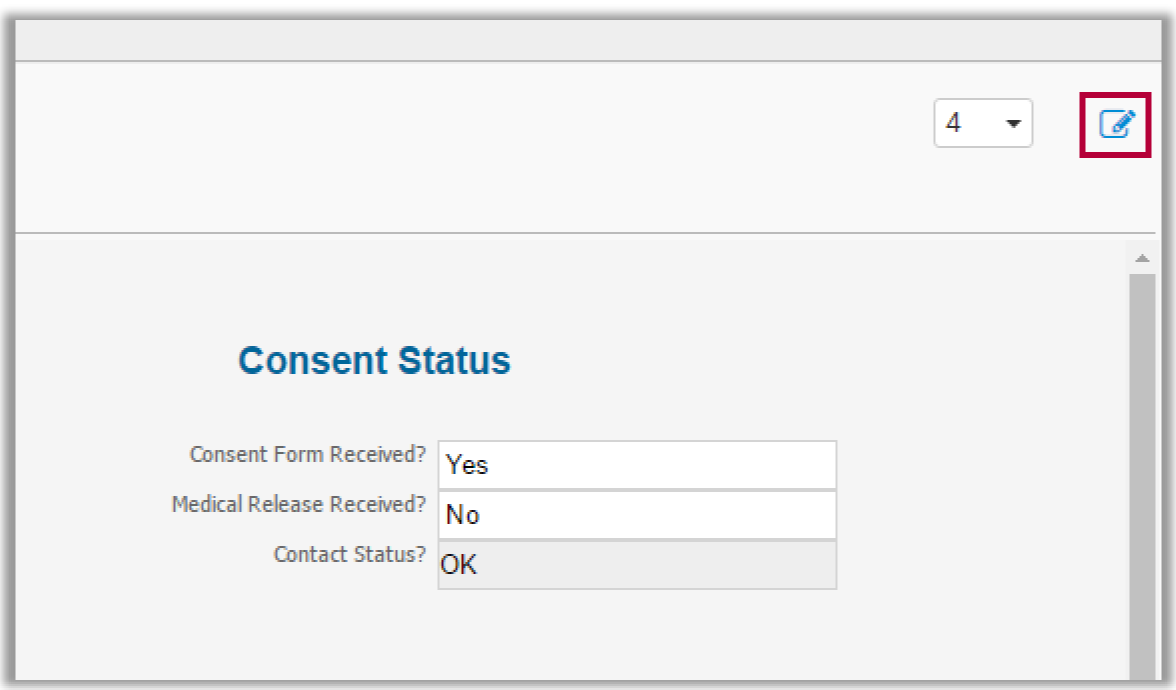


The types of available formats are:

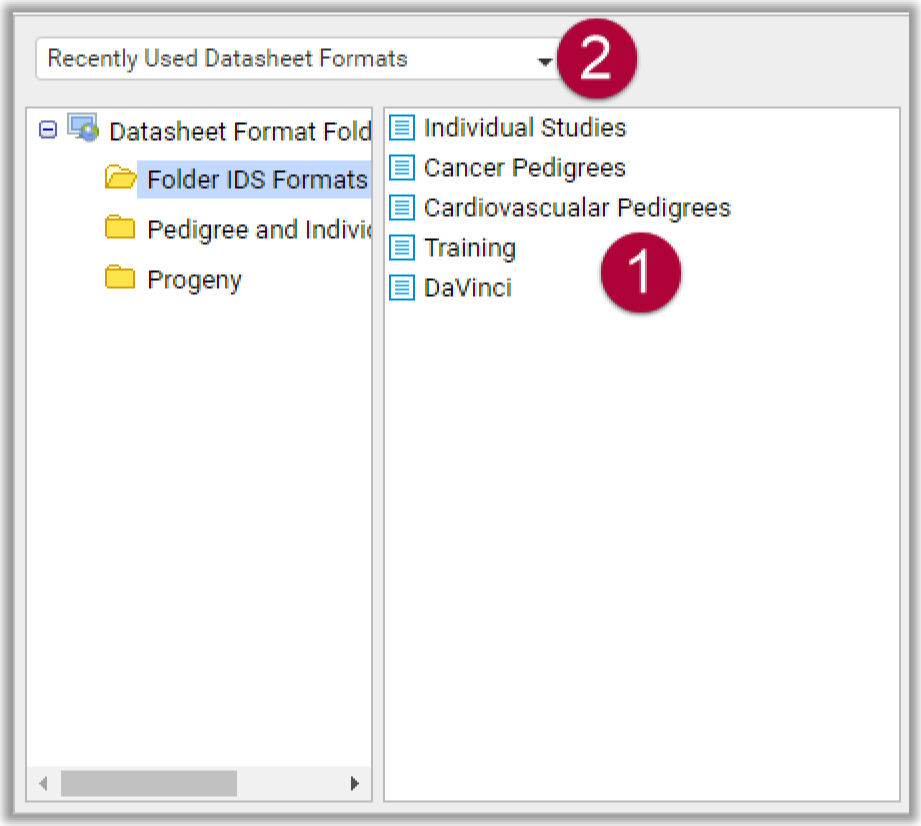
1. Symbols to select types of icons that appear.
2. Text that appears below the individuals in the pedigree.
3. Show certain fields on the pedigree canvas itself.
4. Select which genotype marker formats are used.

Individuals

Select the pen and pad at the top right.

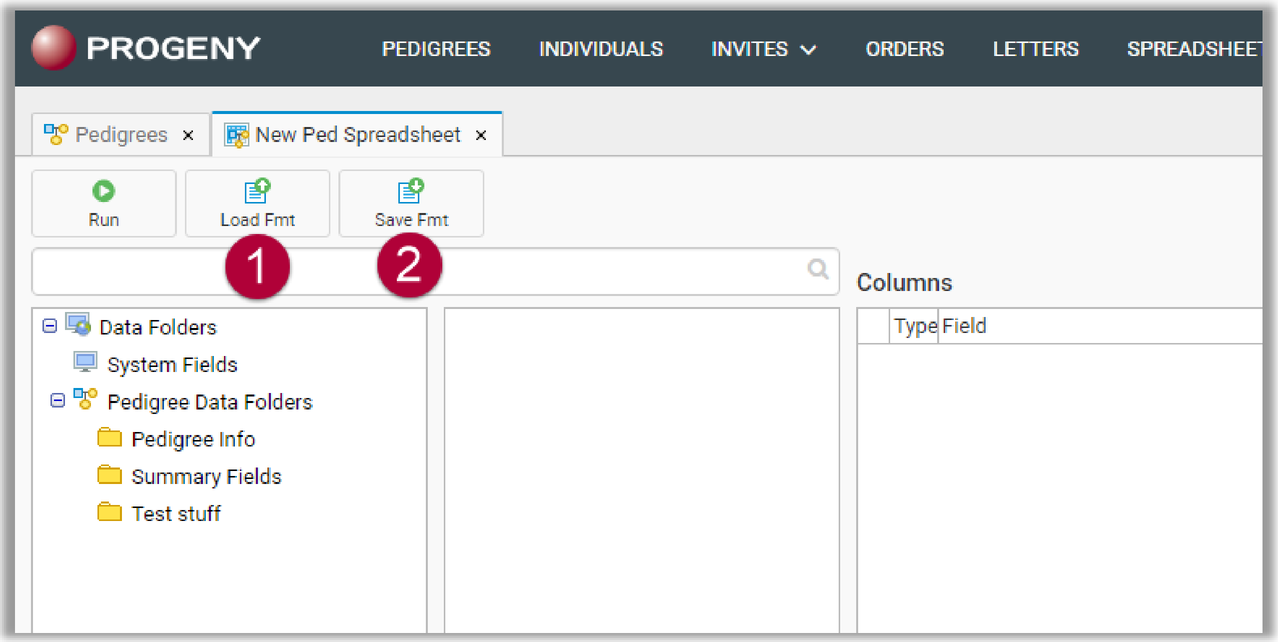


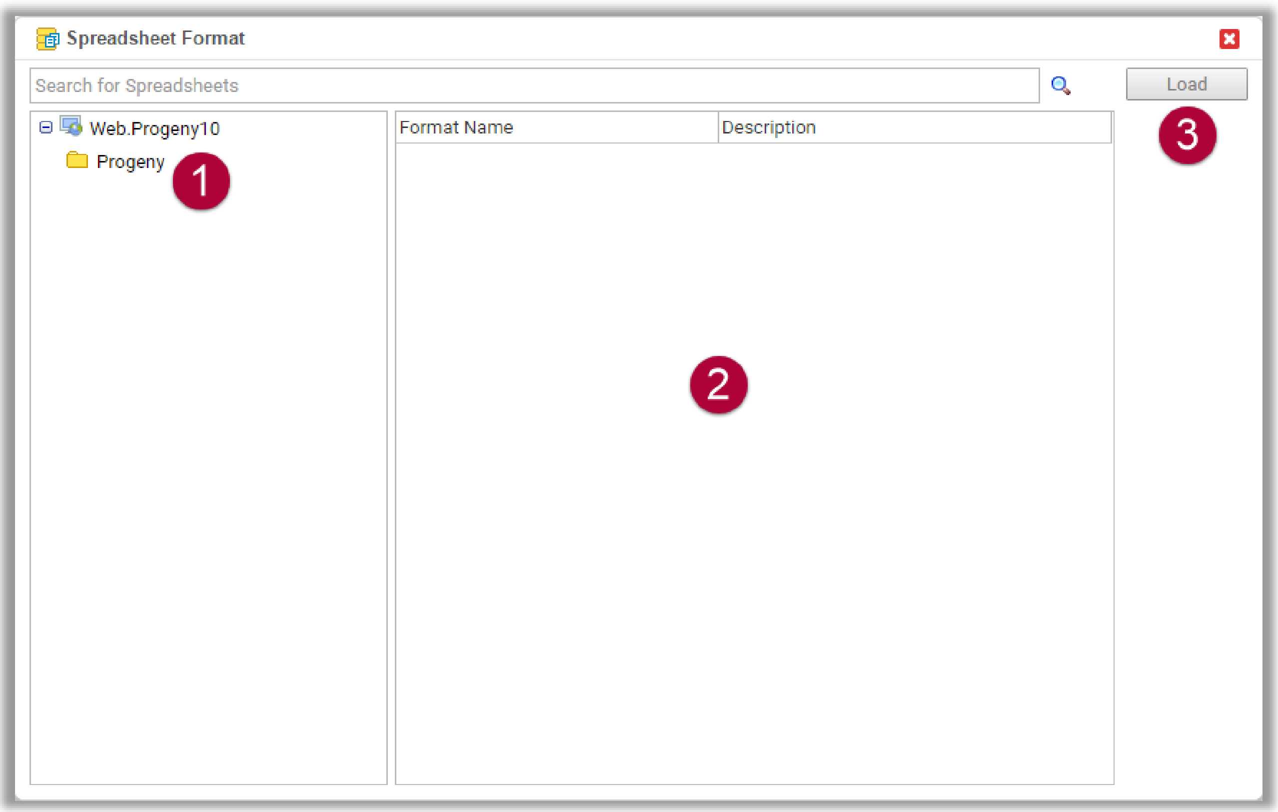
Select the folder having the format you want for the datasheet from section 1.
Select recently used formats from section 2.



Spreadsheets

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



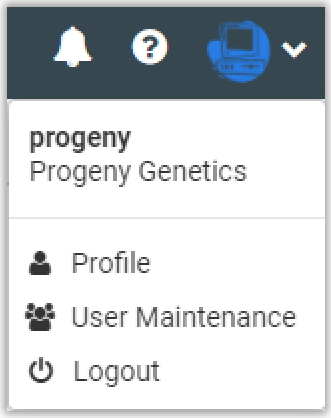


Select the folder having the Format you wish to use in section 1, select the Format in section 2, and then select load in section 3.

User Profile

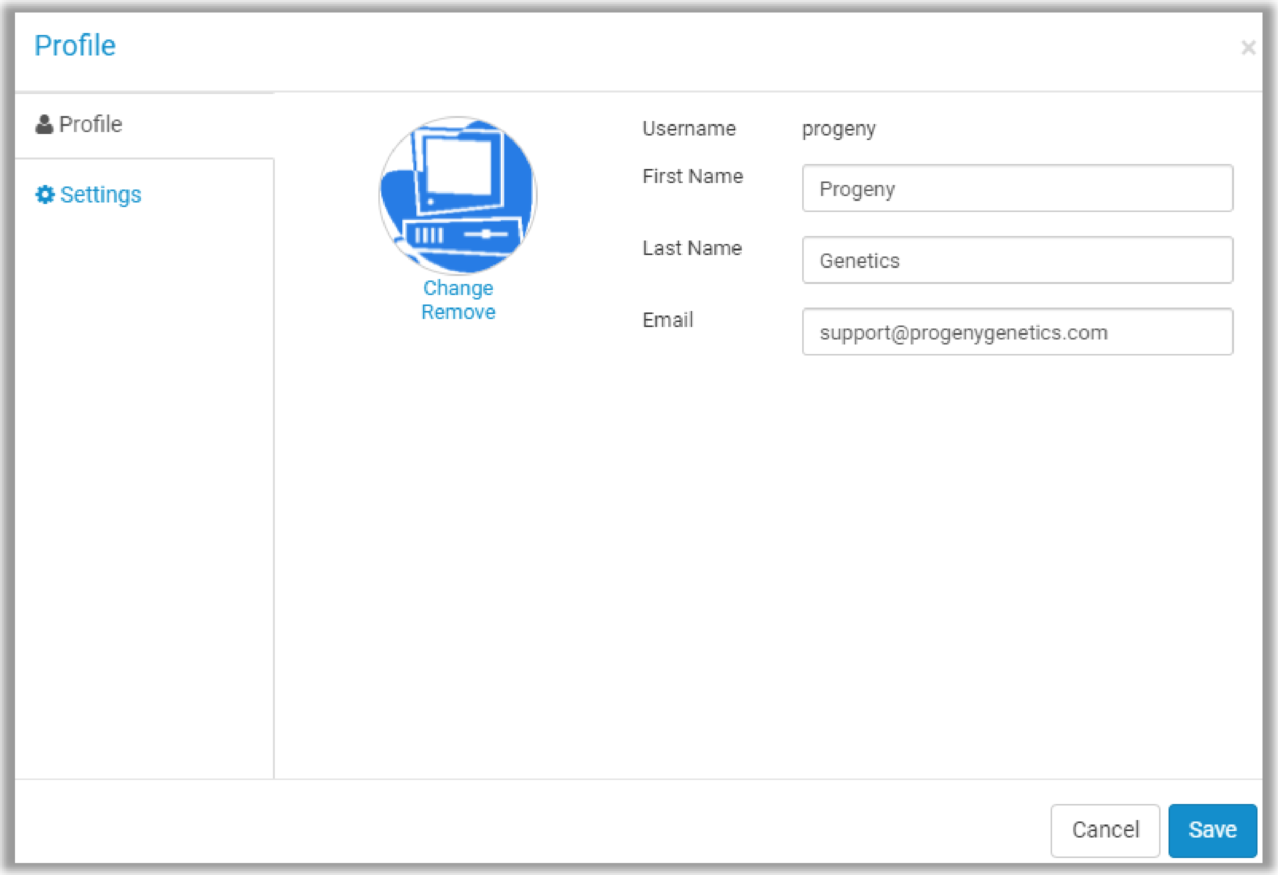
On the upper right corner of the page, click the drop-down arrow next to the image or you can also click the image to see a **Profile** drop-down menu.

The user's username and name (if entered) will be displayed.

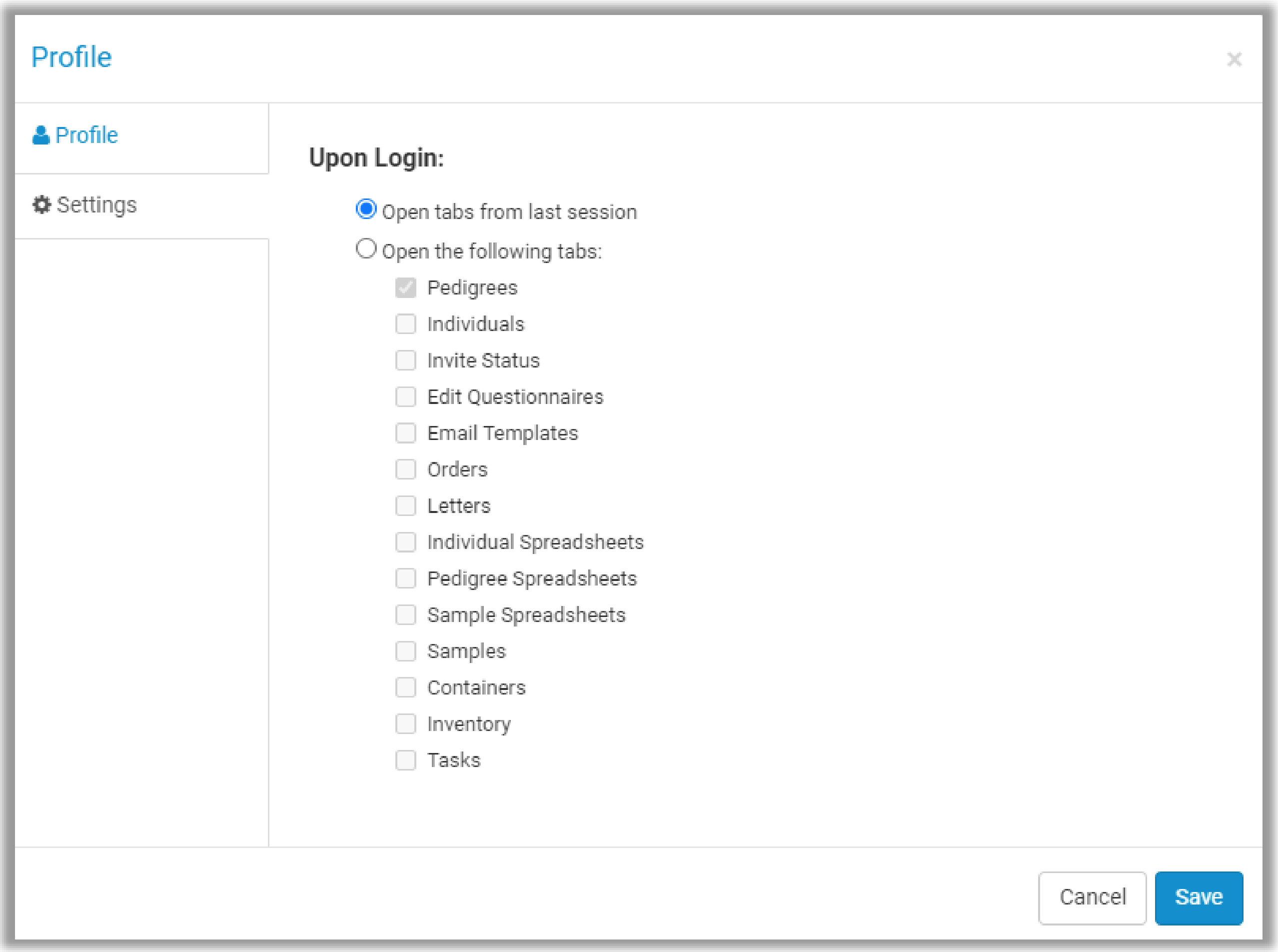


Profile

Clicking **Profile** allows the user to manage their basic user profile.



Here the user can edit their first and last name, email address, and their profile picture.

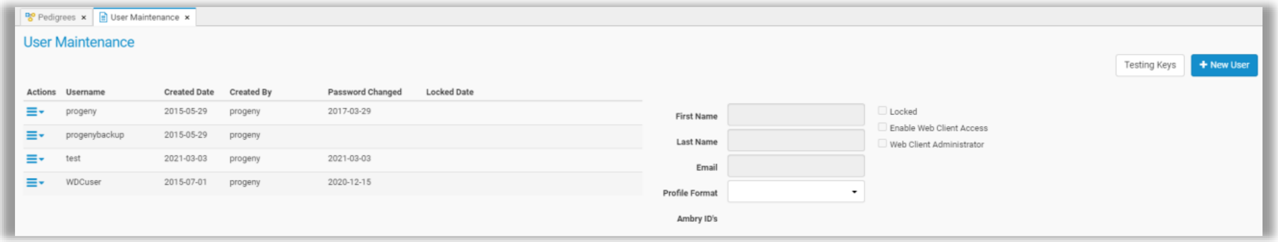


On the **Settings** tab, the user can choose how Progeny is displayed when they log in.

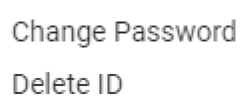
- **Open tabs from last session** - Opens the same tabs that were left opened in their last Progeny session.
- **Open the following tabs:** - Opens the selected tabs/modules.
    - Pedigrees - the Pedigrees module.
    - Individuals - the Individuals module.
    - Invite Status - the Invite Status module.
    - Edit Questionnaires - the Edit Questionnaire templates module.
    - Email Templates - the Email Templates module.
    - Orders - the Ambry Orders module.
    - Letters - the Letter templates module.
    - Individual Spreadsheets- the Individual Spreadsheets.
    - Pedigree Spreadsheets - the Pedigree Spreadsheets.
    - Sample Spreadsheets - the Sample Spreadsheets.
    - Samples - the Samples module.
    - Containers - the Containers module.
    - Inventory - the Inventory module.
    - Tasks - the Tasks module.

User Maintenance

Only administrative users will be able to see this option. This is used for managing the users in the database.

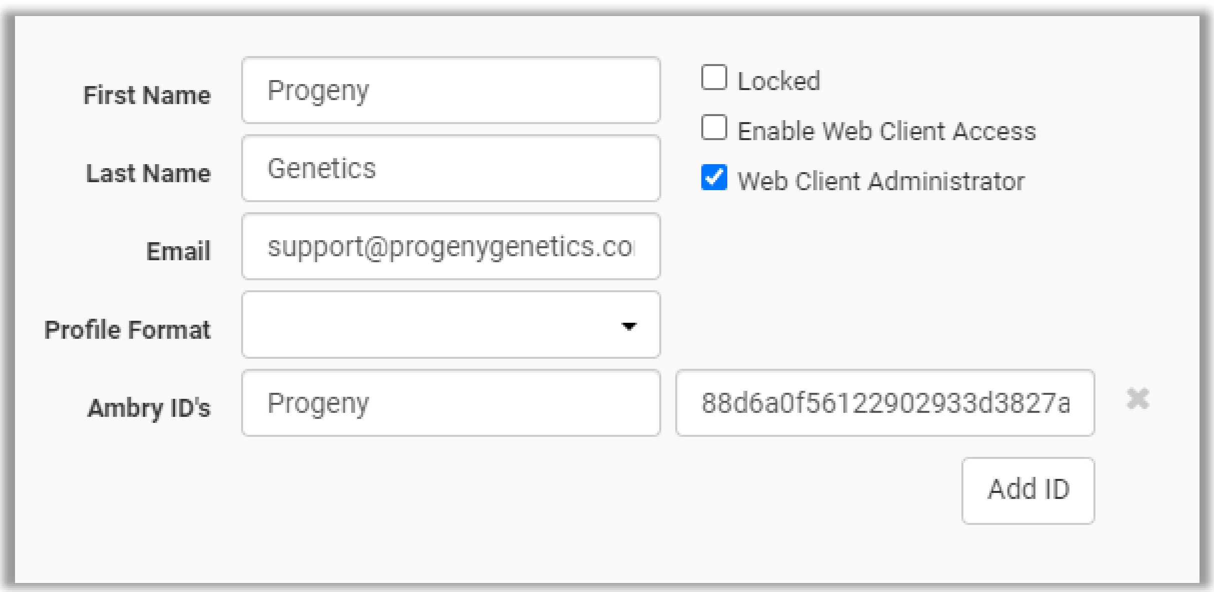


Use the Actions drop-down icon to display additional options for the user.



- **Change Password** - changes the password for the user.
- **Delete ID** - deletes the user account from the database.

By selecting a user from the left-hand side, additional information for that user will be displayed on the right-hand side.



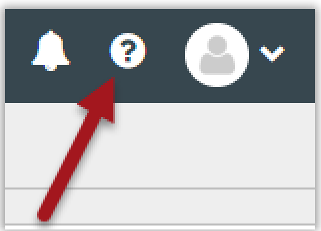
- **First Name** - the first name of the user
- **Last Name** - the last name of the user
- **Email** - the email address of the user. This is necessary if the user wants to be able to use the Reset Password functionality on the login page.
- **Profile Format** - the Profile format for the user. These formats are managed in the Desktop client.

- **Ambry ID's** - the Ambry ID for linking your Ambry Account to your Progeny account. This is necessary for ordering Genetics Tests from Ambry through Progeny.
- **Locked** - used to manually lock/unlock a user.
- **Enable Web Client Access** - enables a user to access Progeny from the Web client. Normally, users have access to the Desktop client but would need this enabled to have access to the Web client.
- **Web Client Administrator** - makes a user a Web administrator, which gives them access to the User Maintenance section.

Logout

Here the user can choose to log out of Progeny.

Help



If you need more help with using progeny, there is a help button next to the login logo that can be clicked which opens the Progeny Learning Center webpage. From that page, you can review articles, videos, and user guides.

That webpage that is opened is http://www.progenygenetics.com/learning-center/

Contact Us

Need further help? Check out our Learning Center at http://www.progenygenetics.com/learning-center/

Our Support Team is here to help! You can reach us at the contact information below.

Email: support@progenygenetics.com
Phone: 1(800)-PROGENY
Support: 1(800)776-4369 x1
Accounts: 1(800)776-4369 x2
Sales: 1(800)776-4369 x3

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