



**PHASER Operations Guide**

**Version 4.0**

**August 13, 2020**



U.S. Department  
of Veterans Affairs



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## Introduction

This document provides instructions for the following four areas of PHASER program operations. The terms *PGX lab test*, *PHASER test*, and *pharmacogenomic test* are used interchangeably. If you have questions or suggestions please email [michael.naglich@va.gov](mailto:michael.naglich@va.gov).

1. Package and ship lab specimens to Sanford Health Labs in Sioux Falls, SD.
2. Process tests results returned by Sanford Health Labs.
3. Monitor site operations using the Corporate Data Warehouse (CDW) PGx order report and periodic Health Factor audit reports.
4. The use of the VA-PGX-L listserv for PHASER project communications.

## Roles and Responsibilities

This section describes the general roles and responsibilities of project team members involved in PHASER operations. Each PHASER location is free to manage these roles in whatever way works best for them. In some locations the Site Coordinator is responsible for entering PGx results. In other locations lab staff perform this function, or there may be several people assigned to enter results. Roles are usually assigned during PHASER implementation but they may change over time. See the **PHASER Implementation Guide** for details.

Role	Responsibilities
PHASER Project Office	<ul style="list-style-type: none"><li>Responsible for national PHASER deployment and support. Project Office contacts are listed in <b>Appendix A – PHASER Contacts</b> on page 17.</li><li>Receive PHASER results from Sanford health for all VA PHASER sites and distribute them to the appropriate destinations.</li><li>Distribute a weekly report to each site of their cumulative of PHASER lab orders. This information is extracted from the VA Corporate Data Warehouse (CDW) and delivered as an Excel workbook.</li></ul>
Sanford Health Lab	<ul style="list-style-type: none"><li>Provide custom-printed PGx requisition forms and shipping kits to PHASER sites. See Error! Reference source not found. on page <b>Error! Bookmark not defined.</b> for details.</li><li>Receive PGx specimens from the VA, analyze them, and return results.</li><li>Provide phone support via the Client Support Line at 1-877-392-1234 or 605-328-5439.</li></ul>
VA Lab	<ul style="list-style-type: none"><li>Maintain a stock of specimen kits and requisition forms as described below in Error! Reference source not found. on page <b>Error! Bookmark not defined.</b>.</li><li>Ship specimens to Sandford Health as described below in <b>Ordering More PHASER Supplies</b> on page 5.</li><li>Process PGx orders in the VistA lab package.</li><li>Load a copy of the PGx PDF result report from Sanford Health into VistA Imaging.</li></ul>
VA Site Champion	The person with overall leadership responsibility for PHASER clinical implementation at a given VA location. They work with executives, perform clinical education for providers, and work with the Site Coordinator to deploy PGx testing and manage operations at their location.
VA Site Coordinator	The person responsible for working with the Site Champion to deploy PHASER at a given location and manage operations. They are also the primary contact for the PHASER Project Office for dissemination of technical updates and other changes to the PHASER project over time.
VA Test Result Entry	One or more people designated to record PGx test results in VistA/CPRS and mail a copy of the results to Veterans. <b>Note:</b> A VistA/CPRS user must be in the <b>PGX AUTHORIZED STAFF</b> user class in order to enter PGX results. Assigning this user class is normally done by your site CAC.



## Ordering More PHASER Supplies

When more shipping kits or requisitions are needed, email your request to [PhaserSupplies@SanfordHealth.org](mailto:PhaserSupplies@SanfordHealth.org). Include the following information. Once your order has been placed allow 5-7 days for delivery.

- Your name and contact information.
- The name of your VA location.
- Specify the quantity of kits you need (4, 8, 12). Kits are shipped in quantities of 4.

## Shipping Kit Contents

Each shipping kit contains:

- 1 – Foil pouch
- 20– Biohazard zipper bag with small absorbent pads
- 1 – 6x12 absorbent material (white)
- 2 – ice packs
- 1 – FedEx shipping label
- 1 – 10x10 cardboard slat
- Instruction sheet

## Packing Instructions

Specimens should be shipped within 24 hours of being drawn. See **Specimen Shipping FAQ's** on page 6 for additional information.

1. Each sample requires one 3-7mL (13x75-13x100 mm) EDTA tube labeled with an accession label that includes patient's full name, DOB, and date and time of collection. The minimum required sample volume is 1.0 mL. Sanford Health is not able to process tubes larger than 13x100mm.
2. Complete one Sanford Requisition form per sample with the information listed below. The patient's SSN also needs to be included with each sample on a printed document. That can be a printed label on the specimen tube or an accession report from the VistA lab package, whatever is most convenient provided the SSN is printed and not hand-written.

Each requisition form is stamped with a unique sample code. Do not use photocopies. Follow instructions given above in the section titled **Ordering More PHASER Supplies** if you need more requisition forms or other PHSAER supplies.

- Patient name with last name first, such JONES, WILLIAM.
- Patient DOB

- For the **Chart No** use first initial of last name + last 4 of SSN. For example, WILLIAM **J**ONES with an SSN of 111-55-**6789** would have a chart number of **J6789**.
- The patient's SSN also needs to be included with each sample on a printed document.

**Note:** A printed label with the above information can be applied to the form in lieu of filling it out by hand.

3. Follow any location procedures you have for recording information for your records before shipping specimens.



4. Pack specimens and their paperwork in a Sanford Thermopak box following these steps:

- a) Open white box and foil pouch. Remove supplies.
- b) One patient per bag. (Use separate bags for each patient).
- c) Paperwork for that patient should be placed in the side pocket of the biohazard, zipper bag. If baggie does not have side pocket, please place requisitions in a separate bag.
- d) Ensure all sample bags are zipped shut and placed at the bottom of the foil pouch.
- e) Place white absorbent material on top of samples.
- f) Place two frozen ice packs on top of absorbent material.
- g) Close foil pouch by folding it into itself. PLEASE DO NOT TAPE THIS POUCH.
- h) Place 10x10 cardboard slat on top of the foil pouch.
- i) Close white box and seal with tape.
- j) Affix pre-printed FedEx label.
- k) Follow your facility's SOP for FedEx pickup.

5. Place the pre-printed FedEx Air bill on top of the box. The shipping destination is:

**Sanford Medical Center Lab,  
1500 W. 22nd Street,  
Suite 1536,  
Sioux Falls, SD 57105**

9. Arrange FedEx pickup. Ideally, send out Monday through Thursday, with no holiday the next day, for Overnight/Next day delivery. **Note:** Please do not ship specimens if the next day is a holiday. Contact the Sanford Health Client Support Line at 1-877-392-1234 or 605-328-5439 if you have questions.

## Specimen Shipping FAQ's

Q: How often should we ship samples?

A: Ship samples within 24 hours of being drawn.

Q: How long are samples viable?

A: Samples should be kept refrigerated. If necessary, samples can be held up to 48 hours before being shipped to the lab for processing, but that should be exception. Samples should be within 24 hours.

Q: Do samples require refrigeration?

A: Yes. Samples must be refrigerated. Samples must be shipped with the cold packs in the shipping container, regardless of time of year. If being transported from a CBOC to the central lab at the Medical Center, please transport in a cooler accompanied by cold packs until transition to central lab custody. Do not let samples come into direct contact with ice packs or frozen items.

Q: How many samples can be shipped together?

A: Package one patient specimen per bag. (Use separate bags for each patient). Paperwork for that patient should be placed in the side pocket of the biohazard, Ziplock baggie. If the generic biohazard Ziplock bag used doesn't have a self-contained outer sleeve for paperwork enclosure, put the paperwork in a separate Ziplock bag. Paperwork should always be kept dry and protected from potential contamination in the event of tube breakage.

Q: How do I order more Thermopak boxes or paper requisition forms?

A: See **Ordering More PHASER Supplies** on page 5.

Q: When should I re-order Sanford Thermopak boxes or paper requisition forms?

A: Plan to have enough on hand to handle one week's worth of samples and shipments. Supplies are shipped FedEx ground and could take as many as 5-7 days to receive at your location

Q: What if we run out of supplies?

A: See **Ordering More PHASER Supplies** on page 5.

## PHASER Test Result Processing Overview

The steps involved in the current process are illustrated below in Figure 1 - PGx Result Processing Overview. Most of the work is done manually, with each PHASER location establishing the process that works best for them. This is expected to change to an automated process that is consistent across PHASER sites late in 2020.

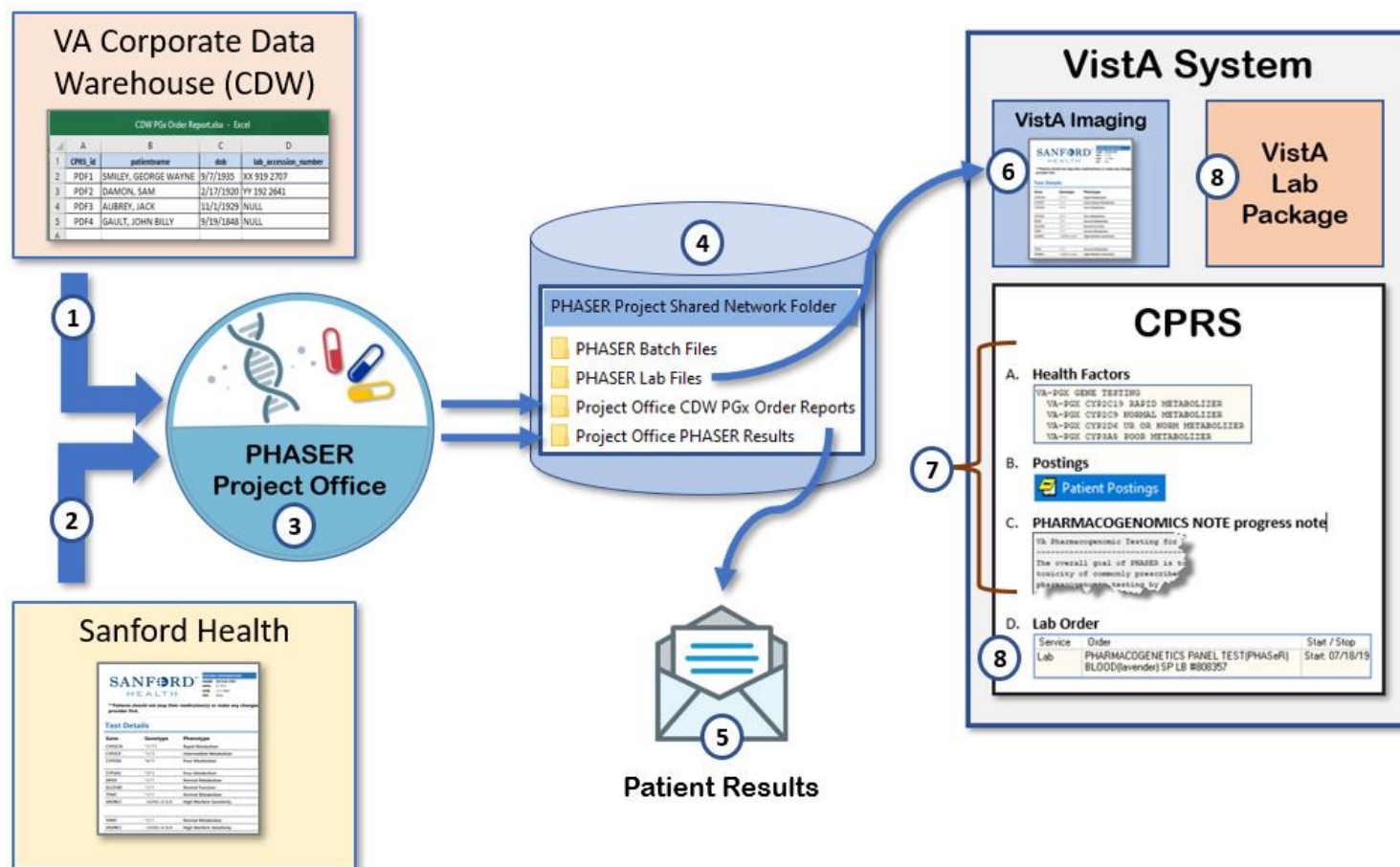


Figure 1 - PGx Result Processing Overview

### Illustration Key

1. Sanford Health sends PGx test results as one or more PDF files attached to an encrypted secure email. Each PDF file contains results for one patient. Secure emails from Sanford Health are sent to specific individuals designated by each PHASER site.
2. Every week a summary report of PGx orders from the VA Corporate Data Warehouse (CDW) is distributed. Audit reports of any discrepancies in Health Factor entries are also distributed periodically. Both reports are sent to specific individuals designated by each PHASER site.
3. Each site determines who is responsible for receiving and processing the PDF files from Sanford Health, the Order Report, and the Health Factor audit. It is some combination of lab staff, the Site Coordinator, and one or more individuals designated to enter results in CPRS. In some cases, all 3 jobs are performed by one person.

4. Lab staff will usually load the PDF files into VistA Imaging.
5. Lab staff usually complete PGx orders in the VistA Lab package when results are received from Sanford.
6. The PHASER reminder dialog is used to enter PGx into VistA/CPRS in the form of both a progress note and a set of Health Factors. A person must be in the **PGX AUTHORIZED STAFF** user class in order to enter results.
7. The person who enters PGx results notified the order provider by making them an additional signer for the CPRS progress note.
8. A cover letter, summary of results from Sanford Health, and a post-test brochure are prepared for each Veteran who was tested.
9. Results are sent via mail to each Veteran.

## PHASER Test Result Process Steps

Step numbers correspond to labels shown above in Figure 1 - PGx Result Processing Overview.

### Step 1 – Receive Results from Sanford Health

During initial PHASER implementation, specific individuals are designated to receive PDF results from Sanford Health via secure email. They receive a test secure email from Sanford Health and establish their personal password for opening encrypted emails from Sanford. You can change who receives results at any time by having your Site Coordinator contact the PHASER Project Office at one of the numbers listed in **Appendix A – PHASER Contacts** on page 17.

PGx results are sent to the originating VA location as they become available, normally a week to 10 days after the specimens have been shipped. Sanford Health sends a single secure email that goes to all people at that location who were designated to received results. An example is shown below. In this case, Jennifer Chapman and Michael Naglich were designated to receive results from Sanford

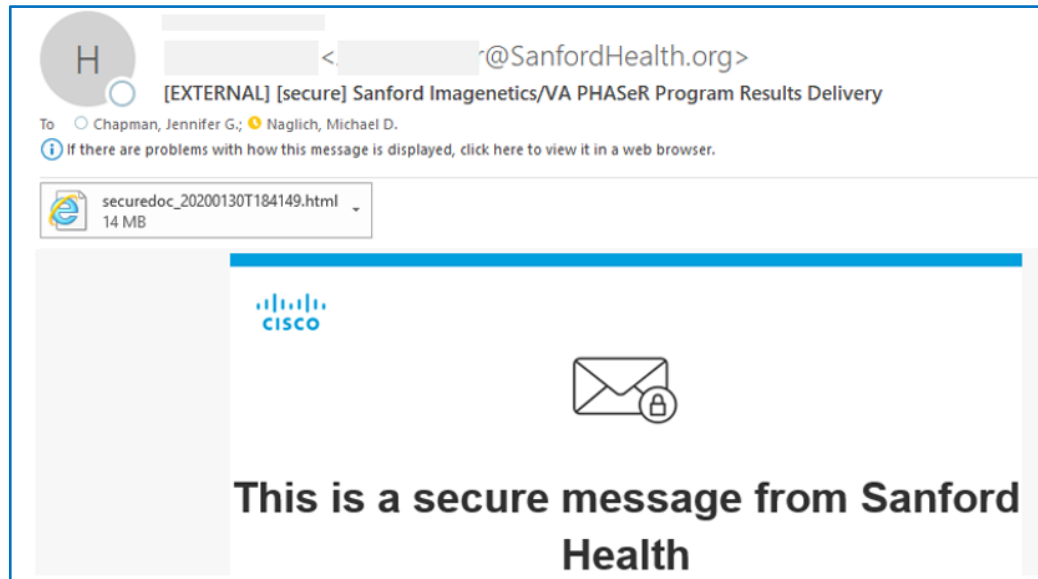


Figure 2- Secure Email Example

It is up to each PHASER site to decide which individual is responsible for processing each secure email. This includes deciding where the individual result PDF's are stored. Step (1) is complete when the secure email has been opened and the PGx PDF result files it contains have been detached to a local drive where they can be accessed for further processing.

### Step 2 – Process the PGx Order and Audit Reports

Every week a summary report of PGx orders from the VA Corporate Data Warehouse (CDW) is distributed. Audit reports of any discrepancies in Health Factor entries are also distributed periodically. Both reports are sent to specific individuals designated by each PHASER site. A list of column names and their uses can be found in **Appendix B** – on page 18. Among the columns are Quality Improvement (QI) flags that indicate potential problems. The Site Coordinator should check this report weekly to identify potential problems and monitor site performance.

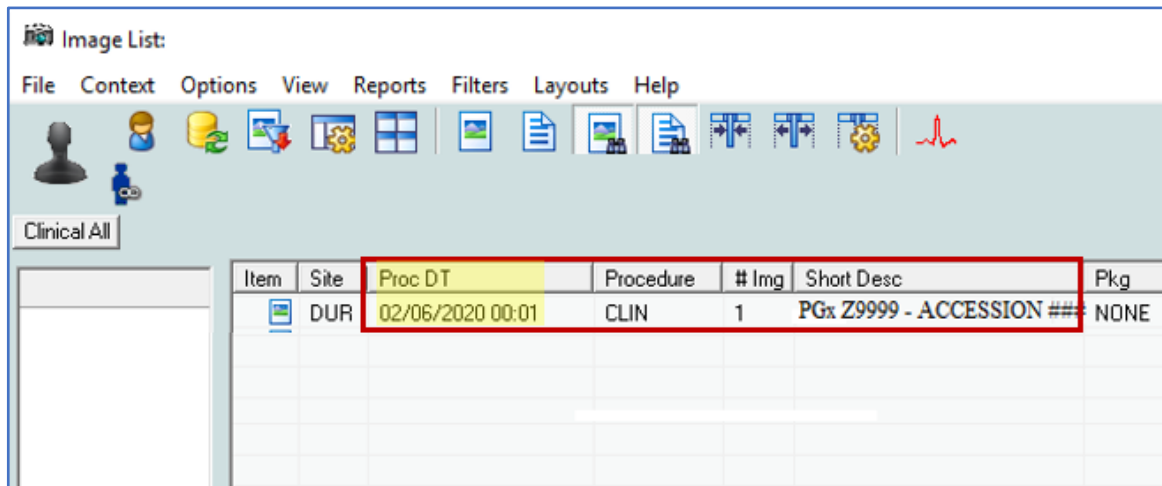
Every month the PHASER Project Office audits the results entered manually in CPRS against the results reported in the PDF files from Sanford Health. If discrepancies are found the PHASER Project Office will contact the Site Coordinator directly to have them corrected.

### Step 3 – Staff Responsibilities

This portion of the diagram is intended to indicate the 3 distinct roles that perform following Steps (4) through (9). Each role requires different skills and has different responsibilities. In some case, one person will perform all 3 roles, in other cases the work will be divided among several people.

### Step 4 – Load the PDF Report into VistA Imaging

In this step a copy of the complete PDF report is loaded into VistA Imaging using the VistA Imaging Capture Client. Use of the Capture Client requires special VistA keys and training. At some locations this step is performed by the Health Information Management (HIM) department. In other locations it may be performed by lab staff or the Site Coordinator. Note the **Proc DT** field. Step (5) on page 13 shows where this date is recorded in the progress note. It is intended to help providers locate the full report in VistA Imaging. Some locations also include special text in the **Short Desc** field to distinguish PGx reports from other documents in VistA Imaging. Step (4) is complete when the PDF file has been loaded.



Item	Site	Proc DT	Procedure	# Img	Short Desc	Pkg
	DUR	02/06/2020 00:01	CLIN	1	PGx Z9999 - ACCESSION ###	NONE

Figure 3 - PGx PDF in VistA Imaging

## Step 5 – Complete the PGx Order in the Lab Package

This step is almost universally performed by lab staff, and it is usually done at the same time the PDF is loaded into VistA Imaging.

## Step 5 – Complete the PGx Order in the Lab Package

This step is almost universally performed by lab staff, and it is usually done at the same time the PDF is loaded into VistA Imaging.

## Step 6 – Enter Results in CPRS

It is important to be sure the PDF has been loaded into VistA Imaging before proceeding with this step. If that has not been done, there is a risk that a provider may see summary results in CPRS but, when they attempt to find the full report, will become frustrated and upset that it is not available in VistA Imaging.

At the time this document was written there were two different PGx reports. One for an 8-gene test and one for an 11-gene test. The 8-gene test is in the process of being phased out, but for now you may receive either report, depending on when the lab specimen was submitted. The difference between the 2 reports is addressed below in a series of sub-steps.

### Step 6a – Open the Report

You will need to refer to test details on the Sanford report for this step. The information you will need from the 11-gene report is shown below. The 8-gene report is the same, there are just 3 fewer genes listed. All examples in the remainder of this document will show the 11-gene report. The 3 pieces of information you need from this report are the Patient Information shown in the upper right-hand corner, the list of genes, and the list of corresponding phenotypes for that patient.

SANFORD <sup>TM</sup> HEALTH			
PATIENT INFORMATION			
NAME: Mxillor			
MRN: M9999			
DOB: 3/8/1981			
SEX: Female			
<b>**Patients should not stop their medication(s) or make any changes to their medication(s) without consulting with their provider first.</b>			
Test Details			
Gene	Genotype	Phenotype	Alleles Tested
CYP2C	g.96405502G>A G/G	Low Sensitivity	g.96405502G>A
CYP2C19	*1/*1	Normal Metabolizer	*2, *3, *4, *4B, *5, *6, *7, *8, *17
CYP2C9	*1/*1	Normal Metabolizer	*2, *3, *5, *6, *8, *11
CYP2D6	*1/*17	Normal Metabolizer	*2, *3, *4, *4M, *6, *9, *10, *17, *29, *41, *5 (gene deletion), XN (gene duplication)
CYP3A5	*1/*1	Normal Metabolizer	*3, *6, *7
CYP4F2	c.1297G>A G/G	Homozygous for the G allele (rs2108622)	c.1297G>A
DPYD	Activity Score: 2	Normal Metabolizer	1905+1G>A, 1679T>G, 2846A>T
IFNL3	rs12979860 C/C	Favorable Genotype Response	rs12979860
SLCO1B1	*1/*1	Normal Function	388A>G, 521T>C
TPMT	*1/*1	Normal Metabolizer	*2, *3A, *3B, *3C, *4
VKORC1	-1639G>A G/G	Low Warfarin Sensitivity	-1639G>A

Figure 4 - Sample 11-Gene Report



## Step 6b – Login to VistA/CPRS

Now that you have the PGx results, login to VistA/CPRS and perform the following steps in preparation for entering this patient's phenotype results for the 11 genes that were tested. As stated above, entering 8-gene results are the same, there are just 3 fewer genes. The following example is based on the steps followed at the Durham VA Hospital pilot site. They can be adapted as necessary at your location.

1. Select the patient listed on the PDF report. Their VA CPRS MRN is listed in the report Patient Information section as shown above in **Figure 4 - Sample 11-Gene Report**. Verify the patient's name, DOB, and the last 4 digits of their SSN.

VistA CPRS in use by: Naglich, Michael D (vista.durham.med.va.gov)

File Edit View Tools Help

ZZTEST,TEST (OUTPATIENT) Visit Not Selected No PACT assigned at any VA locati  
000-00-9742 Jan 01,1995 (25) Current Provider Not Selected

Active Problems Allergies / Adverse Reactions  
\$ Costochondritis

Provider & Location for Current Activities

Encounter Provider  
Naglich, Michael D - OPERATIONS RESEARCH ANALYST  
Nag, Uttara - RESIDENT  
Naggie, Susanina - ATTENDING PHYSICIAN  
Naglich, Michael D - OPERATIONS RESEARCH ANALYST  
Nagrani, Sohan R

Encounter Location  
DUR-PHASER Feb 13, 20 13:48

Clinic Appointments Hospital Admissions **New Visit**

Visit Location  
DUR-PHASER  
DUR-PCIS-X  
DUR-PRECISION-ONCO E-CONSULT-  
DUR-PRIMARY CARE-VVC  
DUR-PRIME-PC-GAP  
DUR-PRIME-PCMH-INT-PAIN GRP  
DUR-PRIME-PCMH-INT-WELLNESS C

Date/Time  
NOW

☐ Historical Visit: a visit that occurred at some time in the past or at some other location (possibly non-VA) but is not used for workload credit.

OK Cancel

Click OK when you have filled in all the information.

MST Screening DUE NOW

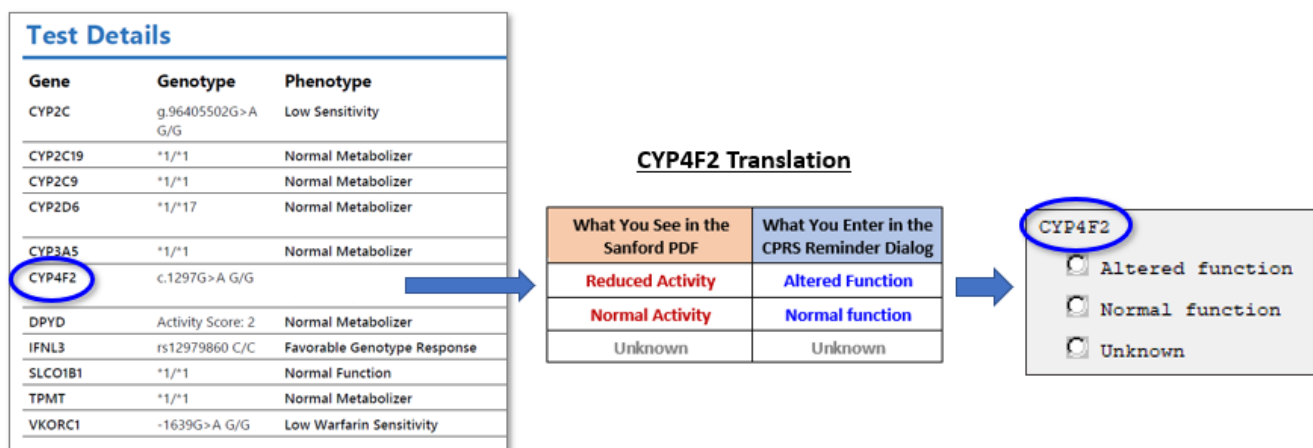
2. Click the Visit button (it displays 'Visit Not Selected' at this point) and choose the **New Visit** tab create a new visit. The person entering results is the encounter provider. Use an administrative clinic, one that is not associated with billable activity and does not require a medical diagnosis for a visit, as the visit location. Date/Time is set to NOW.

- Click the **Notes** tab, select **New Note**, and choose PHARMACOGENETICS NOTE from the list of note titles


- The PHASER reminder dialog appears. **Important Note:** Despite best efforts to ensure that Sanford Health report results exactly match the PHASER reminder dialog, there is one case where they do not. The exception is a discrepancy between PDF results reported for the **CYP4F2** gene, and how those results are entered in the PHASER reminder dialog. The following illustration shows how to handle this discrepancy. Results for the other 10 genes reported will exactly match between the PDF and the reminder dialog.

## PGx Gene CYP4F2

### Manual Translation Required When Entering Results in CPRS



- Verify the patient's consent decision has been documented. Select either the 8-gene or 11-gene radio button, depending on the type of report you are working with. In this example we will select **11 gene panel**.


Reminder Dialog Template: PHARMACOGENETICS NOTE

VA Pharmacogenomic Testing for Veterans (PHASER)

The overall goal of PHASER is to improve the efficacy and reduce the

To learn more about the PHASER program or access the PHASER CPRS User Guide, please visit: <https://tinyurl.com/PHASER-provider-SharePoint>

Records indicate that this patient has already agreed to undergo pharmacogenomic testing as part of the PHASER program.

Pharmacogenomic testing typically does not need to be repeated.

Potential reasons to reorder the PHASER panel are if the original order was not completed or there are new genes on the PHASER panel that would impact patient care.

☐ Check here to request repeat testing

Record 8 gene or 11 gene panel test results:

☐ 8 gene panel

☐ 11 gene panel

If you do not see this message, the patient's consent decision has not been documented as required. Contact the ordering provider and request them to document the patient's consent decision

If you do not see these radio buttons, contact your local CAC and ask them to add you to the PGX AUTHORIZED STAFF user class.

6. x

7. Select the **11 gene panel** radio button. The genes and phenotypes for that panel are displayed. Refer to the PDF report from Sanford Health and set the appropriate phenotype for each gene as shown below. Set the **PROC DT** to the date on which the result PDF was loaded into VistA Imaging. This will make it easier

for them to find the full report.

Reminder Dialog Template: PHARMACOGENETICS NOTE

Record 8 gene or 11 gene panel test results:  
☐ 8 gene panel  
☒ 11 gene panel

LOCATION OF FULL RESULTS REPORT: The full test results including impacted medications, individual genotypes, and drug-gene interactions can be found in VistA Imaging under the following PROC DT date: Feb 13, 2020

CYP2C  
☐ High sensitivity  
☒ Low sensitivity  
☐ Unknown

CYP2C19  
☐ Intermediate metabolizer  
☒ Normal metabolizer  
☐ Poor metabolizer  
☐ Rapid metabolizer  
☐ Ultrarapid metabolizer  
☐ Unknown

Select Date/Time

February 14, 2020

OK  
Cancel

Use the calendar control to set the PROC DT field indicating when the result PDF was loaded into VistA Imaging

Test Details

Gene	Genotype	Phenotype
CYP2C	g.96405502G>A G/G	Low Sensitivity
CYP2C19	*1/*1	Normal Metabolizer
CYP2C9	*1/*1	Normal Metabolizer
CYP2D6	*1/*17	Normal Metabolizer

Etc.

8. Enter phenotype results for all the genes on the panel and double-check your work. If everything is correct press **Finish** to proceed. If you want to abandon the note without saving anything, click **Cancel** and then delete the blank progress note in CPRS. If you click Finish and notice there are errors in the note, contact your local CAC or HIM specialist to have them corrected.

Etc.

Unknown

VKORC1  
☐ High warfarin sensitivity  
☒ Intermediate warfarin sensitivity  
☐ Low warfarin sensitivity  
☐ Unknown

Note: These Health Factors are saved in VistA when the Finish button is pressed. If you delete the progress note after pressing Finish the Health Factors remain and must be removed by a CAC or HIM specialist.

VA Pharmacogenomic  
The overall goal of toxicity of commonly pharmacogenomic test health record utilizing clinical decision support to guide interpretation and use of test results. Intended users of this template are individuals with permissions to conduct the consent process, place

Health Factors: VA-PGX 11 GENE PANEL (Historical), VA-PGX CYP2C HIGH SENSITIVITY (Historical), VA-PGX CYP2C19 NORMAL METABOLIZER (Historical), VA-PGX CYP2C9 POOR METABOLIZER (Historical), VA-PGX CYP2D6 POOR METABOLIZER (Historical), VA-PGX CYP3A5 UNINFORMATIVE (Historical), VA-PGX CYP4F2 NORMAL FUNCTION (Historical), VA-PGX DPYD POOR METABOLIZER (Historical), VA-PGX IFNL3 UNINFORMATIVE (Historical), VA-PGX SLCO1B1 POOR FUNCTION (Historical), VA-PGX TPMT POOR METABOLIZER (Historical), VA-PGX VKORC1 INTERMED WARFARIN SENS (Historical)

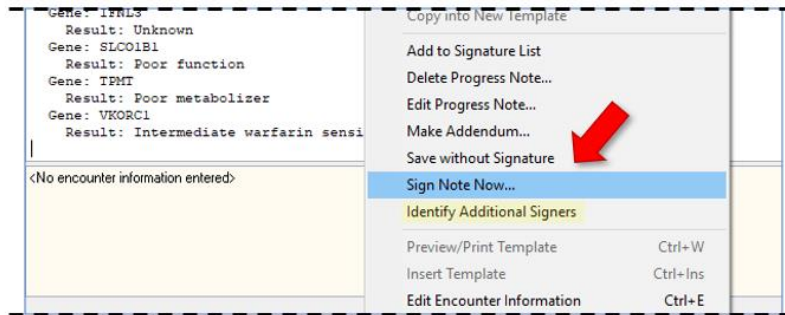
\* Indicates a Required Field

Press Finish to save to save your work and continue.

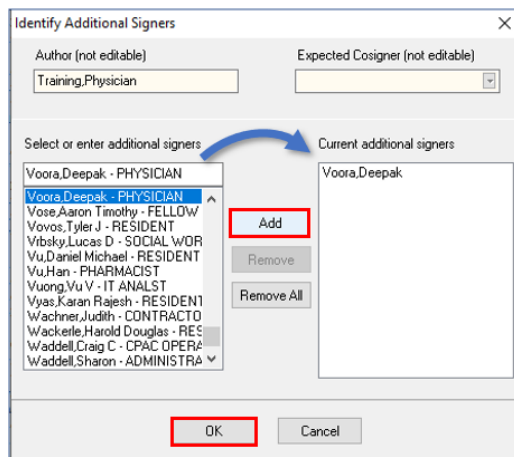
Press Cancel to abandon the progress note without saving anything.

Finish  
Cancel

9. Right-click your mouse, choose **Sign Note Now** from the context menu, and sign the note using your electronic signature.



10. Right-click your mouse again, choose **Identify Additional Signers**, and add the ordering provider as shown below. You can find the ordering provider for each PGx order in the weekly CDW PGx order report. See **Appendix B** – on page 18 for a complete list of data available in that report.



## Step 7 – Ordering Provider Notified in CPRS

When the ordering provider next displays the **Patient Selection** dialog box in CPRS they will see a notification for a PHARMACOGENETICS NOTE that requires their signature as shown in the example below.

**Patient Selection**

**Patient List**

☒ Default: 6AM  
☐ Providers  
☐ Team/Personal  
☐ Specialties

☐ Clinics  
☐ Wards  
☐ All

**Patients (6AM)**

Balbh,Harth Ptryh	A6018-1
Budh,Sexzt P	A6015-1
Buhpdyfxy,Hudj Fxuky	A6016-1
Cuxp,Bhyhse llah	A6030-1
Gluuhu Fhuini I ahnoluhu	A6019-1
A-Kstehyl Zlun	
Aa-Bellackv,Jrusdt T	
Aa-Belsdk,Tyl Z	

**Patient Demographics**

OK  
Cancel

Save

**Notifications**

Info	Patient	Location	Urgency	Alert Date/Time	Message
	VDAADYHT, (V1791)		Moderate	02/11/2020@07:44	UNSIGNED PHARMACOGENETICS NOT
	NK\HT,CKE (N9111)		Moderate	02/10/2020@11:26	UNSIGNED PHARMACOGENETICS NOT

Process Info Process All Process Forward Show Comments Remove

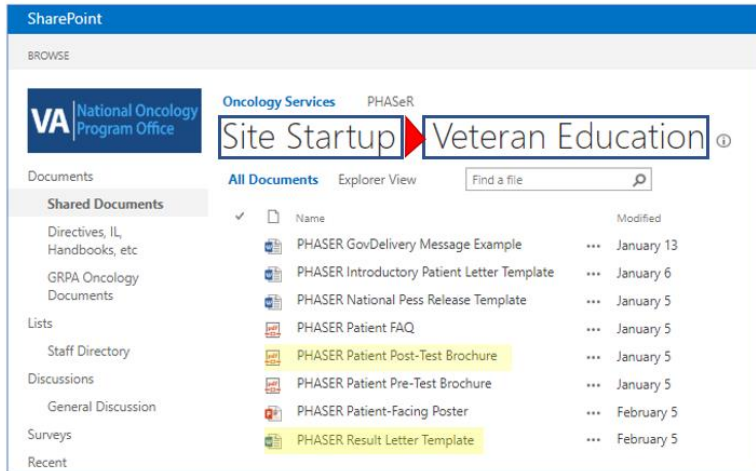
Example of 2 progress notes for which this provider was made an **Additional Signer**.

## Step 8 – Prepare to Mail Patient Results

After the result PDF is loaded to VistA Imaging, the results have been entered into CPRS, and the ordering provider has been notified, the last step is mailing results to the Veteran. The following 3 documents are mailed to each Veteran that was tested. Templates are available on the PHASER SharePoint site at [tinyurl.com/PHASER-provider-SharePoint](https://tinyurl.com/PHASER-provider-SharePoint) as shown below.

1. Summary of PGx test results (pages 2 and 3 of the 11-gene report).
2. PHASER post-test brochure. Have a supply of these printed in color.
3. Cover letter that has been customized for your location. A generic template to get you started is provided on the PHASER SharePoint site. See

4. **Appendix C – Preparing Cover Letters with MS Word Mail Merge** on page 20 for information on printing cover letters for a group of results.



### Step 9 – Mail Results

The information described above is folded and placed in a business size envelope with the Veteran's name and mailing address showing in the envelop window. These envelopes are standard VA Stationary items and can be ordered in bulk in the same way as other office supplies. Remember to include your mailstop on the return address. Seal the envelopes and drop in the mail for delivery. Note: some VA's have mailroom facilities to prepare mailings, seal envelopes, and perform other functions. Work with your local mailroom to find the solution that is best for you.



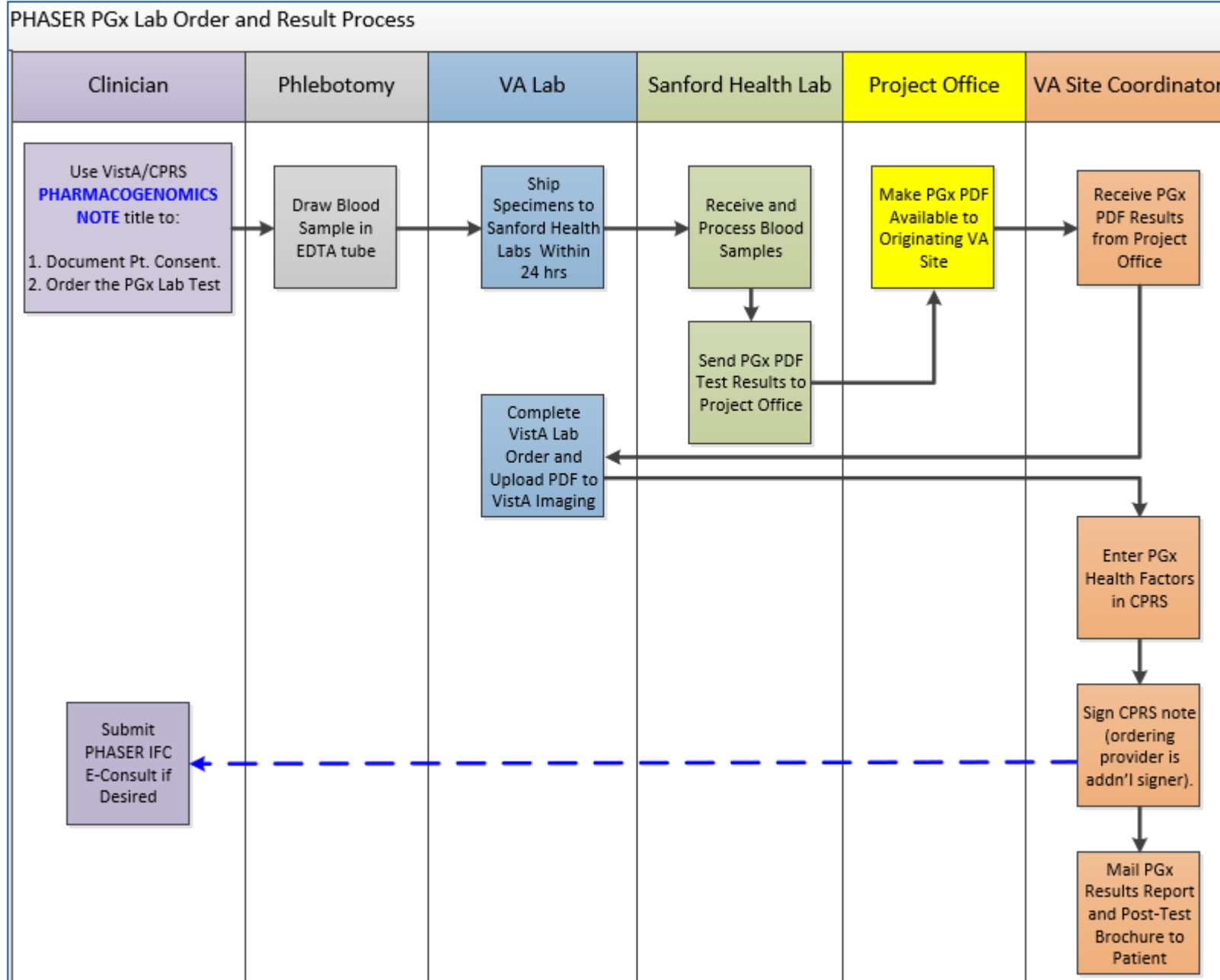
## Appendix A – PHASER Contacts

Please contact any of VA PHASER Project Office staff listed below if you have other question.

Role	Name	Phone	Email
VA PHASER National Clinical Champion, Durham VA PHASER Site Champion	Deepak Voora, MD	919-286-0411 X-175214	deepak.voora@va.gov
VA PHASER National Deployment Coordinator	Mike Naglich	919-225-3733	michael.naglich@va.gov
VA PHASER Pharmacy Program Manager	Pharm.D., M.S., BCOP, FASHP	919-286-0411 X-172213	jill.bates@va.gov
VA PHASER National Project Manager	Jennifer Chapman	919-286-0411 X-176181	jennifer.chapman2@va.gov
VA PHASER Project Coordinator	Hope McFarland	tbd	hope.mcfarland@va.gov

## Appendix B – PHASER Workflow Diagram

This is a general overview of the workflow involved in ordering and shipping tests, and receiving and processing sent to the PHASER project office by Sanford Health.

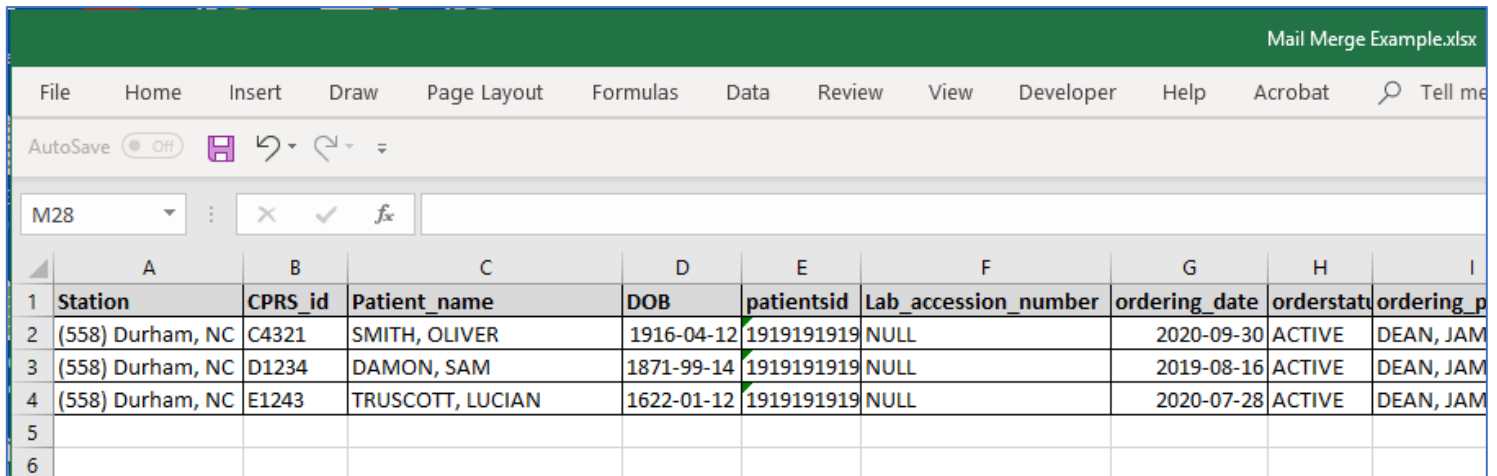




## Appendix C – Preparing Cover Letters with MS Word Mail Merge

This example assumes you have results for C4321, D1234, and E1243 that you want to mail. Start by extracting the associated rows from your weekly CDW PGx order report, including the header row with column names, and saving them in an Excel file. That file is named **Mail Merge Example.xlsx** in this case. The second file you will need is the MS Word template for your cover letter. This example uses file **PHASER Result Letter Template.docx** that is available on the PHASER SharePoint site [tinyurl.com/PHASER-provider-SharePoint](http://tinyurl.com/PHASER-provider-SharePoint).

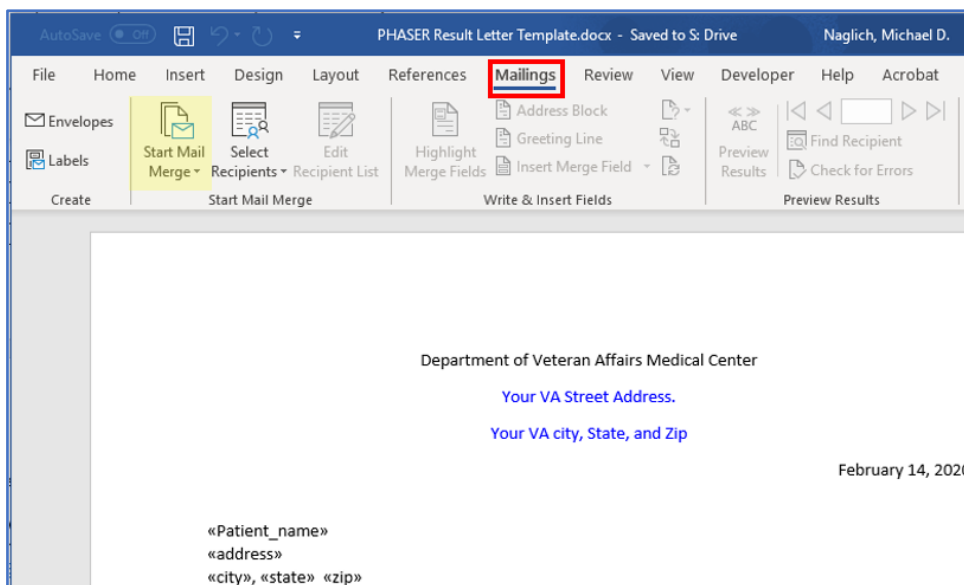
**Note:** details of inserting merge fields into a Word document and other detail are not covered. This is intended to be a simple example requiring as little customization as possible or somebody who is unfamiliar with the Mail Merge feature.



	A	B	C	D	E	F	G	H	I
1	Station	CPRS_id	Patient_name	DOB	patientsid	Lab_accession_number	ordering_date	orderstatus	ordering_p
2	(558) Durham, NC	C4321	SMITH, OLIVER	1916-04-12	1919191919	NULL	2020-09-30	ACTIVE	DEAN, JAM
3	(558) Durham, NC	D1234	DAMON, SAM	1871-99-14	1919191919	NULL	2019-08-16	ACTIVE	DEAN, JAM
4	(558) Durham, NC	E1243	TRUSCOTT, LUCIAN	1622-01-12	1919191919	NULL	2020-07-28	ACTIVE	DEAN, JAM
5									
6									

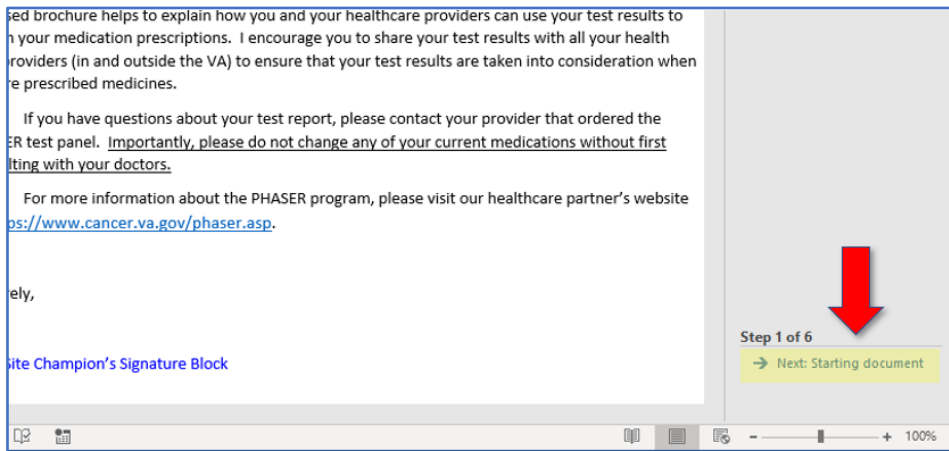
Figure 5 - Sample Data from CDW PGx Order Report

1. Extract information for the results you want to mail and save them in an Excel file as described above.
2. Prepare the Word file with your cover letter. You can use **PHASER Result Letter Template.docx** from the PHASER SharePoint if you want to practice.
3. Open file **PHASER Result Letter Template.docx** in Word. Click **Mailings** and then **Start Mail Merge**.

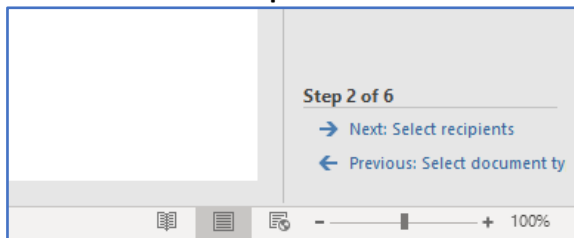


4. Choose **Step-by-Step Mail Merge Wizard**.

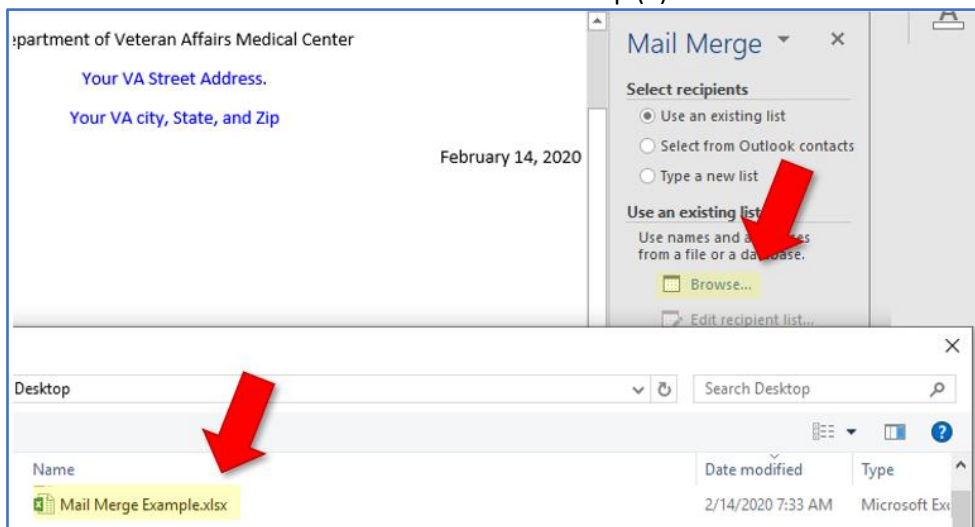
- Wizard steps are shown in the lower right-hand corner of your screen. Click **Next: Starting document** to proceed.



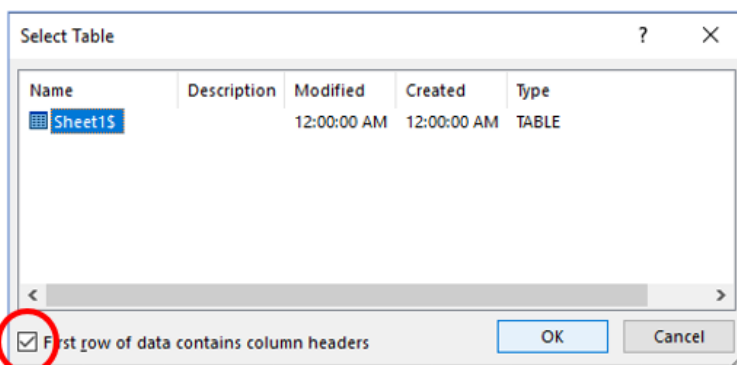
- Click **Next: Select Recipients**.



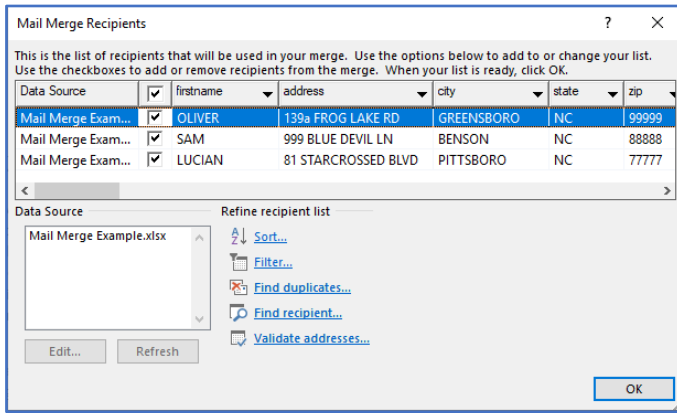
- Click **Browse** and select the Excel file created in Step (1).



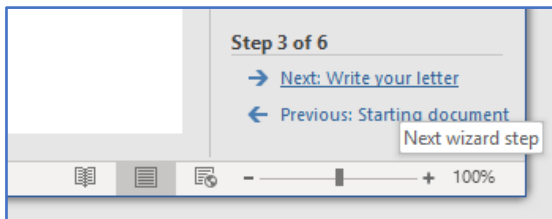
- Click **OK** to continue.



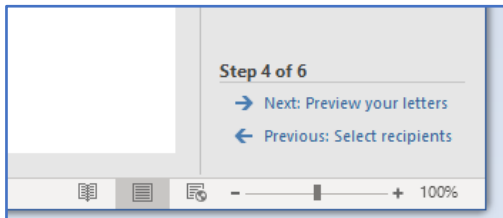
9. Click **OK** to continue.



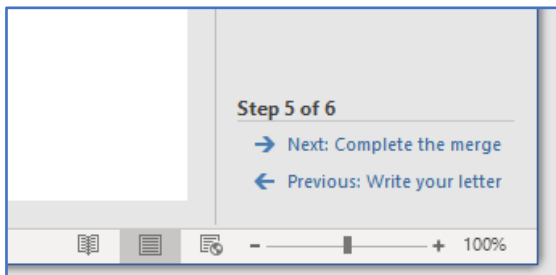
10. Click **Next: Write your letter** to continue.



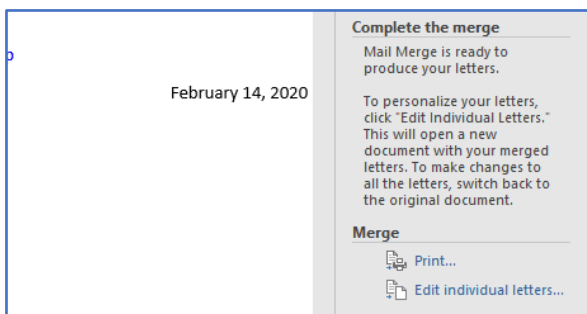
11. Click **Next: Preview your letters** to continue.



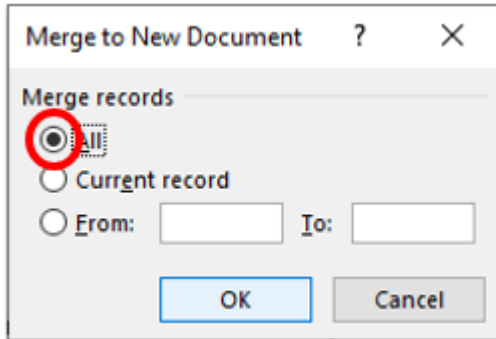
12. Click **Next: Complete the merge** to continue.



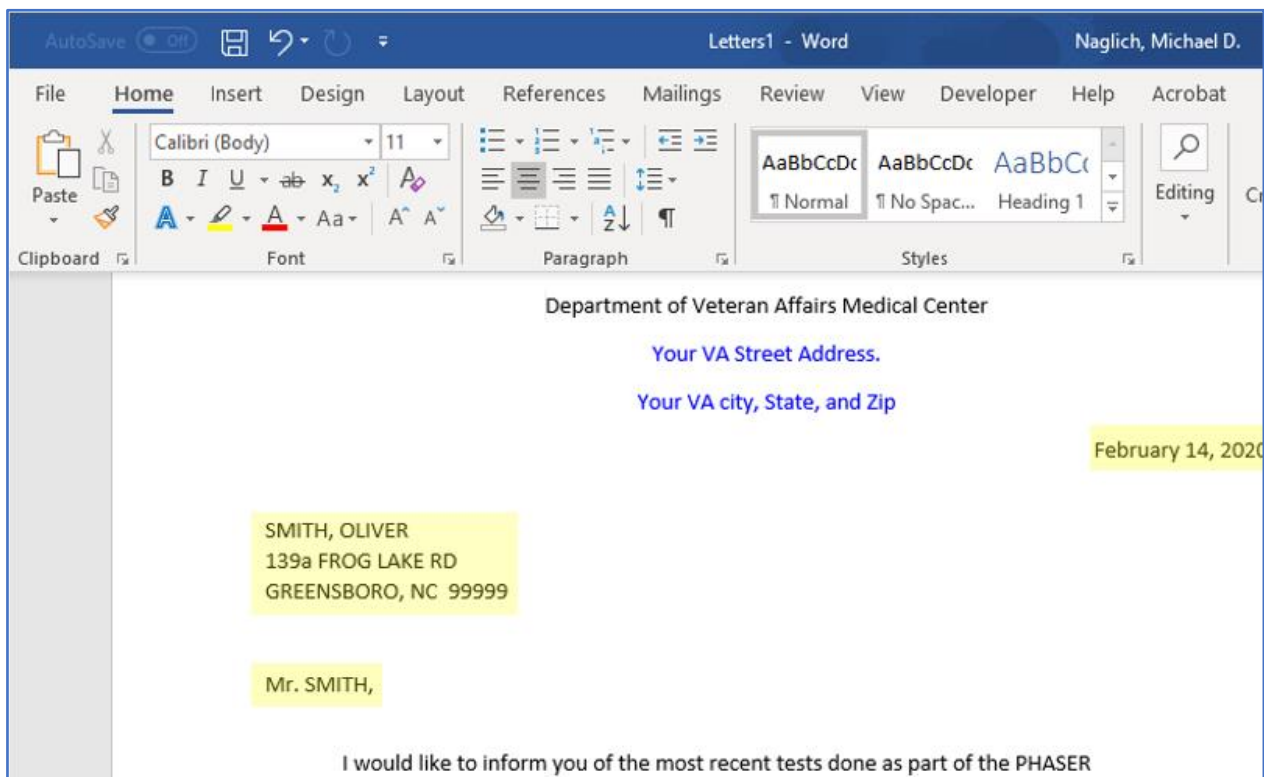
13. Click **Edit individual letters** to continue.



14. Make sure **All** is checked and click **OK** to continue.



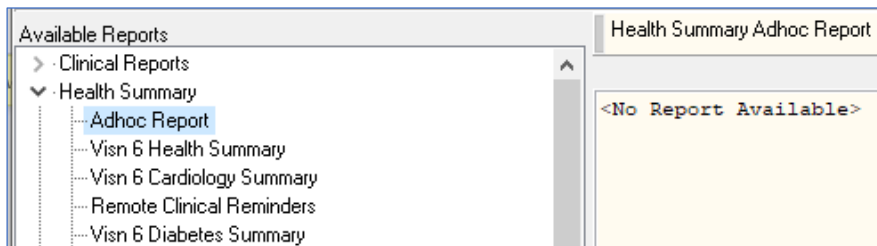
15. Your letters are ready to print. Names and addresses have all been filed in. You can either save the file or quit without saving it.



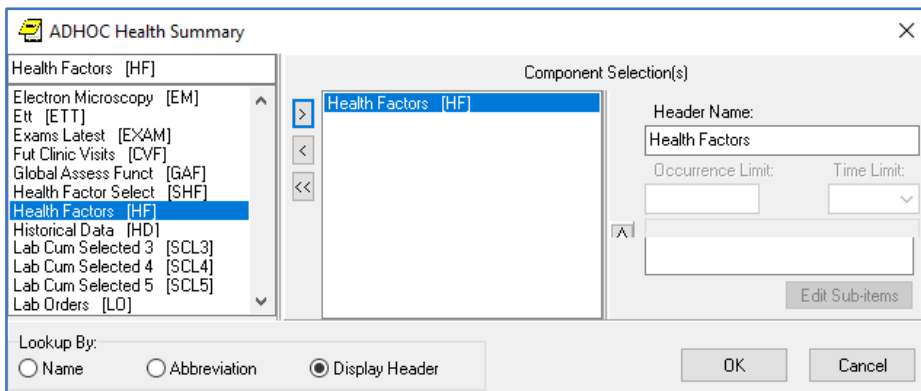
## Appendix D – Viewing Health Factors in CPRS

Follow these steps to check Health Factor settings for a Veteran in CPRS. Think of a Health Factor as a special type of information saved in the electronic health record that can be checked by other Vista/CPRS computer programs to get specific information about that Veteran. For example, Health Factors record the result for each gene reported by the PGx lab test. Other computer programs, such as those related to prescribing medications, can check PHASER PGx Health Factors that may affect if or how certain medications are prescribed, so it is very important to ensure they are accurate.

1. Login to Vista/CPRS and select the patient you want to check. You do not need to select a visit in this case.
2. Select the **Reports** tab.
3. Under Available Reports choose **Health Summary** and then **Adhoc Report**.



4. Choose the **Health Factors** report and click **OK**. The list of available reports varies at each VA facility. You may not have a report titled 'Health Factors (HF)' but there will be some type of similar report. Look for a report that ends with '**(HF)**'.



5. PHASER Health Factors are prefixed with the identifier 'VA-PGX'. The example below shows Health Factors for an 8 gene panel, plus Health Factors that were set for patient education and patient consent. Health Factors are set automatically by the PHASER reminder dialog. Any error require assistance from a CAC or HIM specialist to correct. Please contact the PHASER Project Office if you have questions. Contact information is listed in **Appendix A – PHASER Contacts** on page 17.

Health Summary Adhoc Report		
<b>VA-PGX GENE TESTING</b>		
VA-PGX CYP2C19 RAPID METABOLIZER		02/12/2020
VA-PGX CYP2C9 NORMAL METABOLIZER		02/12/2020
VA-PGX CYP2D6 UR OR NORM METABOLIZER		02/12/2020
VA-PGX CYP3A5 POOR METABOLIZER		02/12/2020
VA-PGX DPYD NORMAL METABOLIZER		02/12/2020
VA-PGX PROVIDER EDUCATION		01/07/2020
VA-PGX SLCO1B1 NORMAL FUNCTION		02/12/2020
VA-PGX TESTING ACCEPTED		01/07/2020
VA-PGX TPMT NORMAL METABOLIZER		02/12/2020
VA-PGX VKORC1 NORMAL WARFARIN SENS		02/12/2020