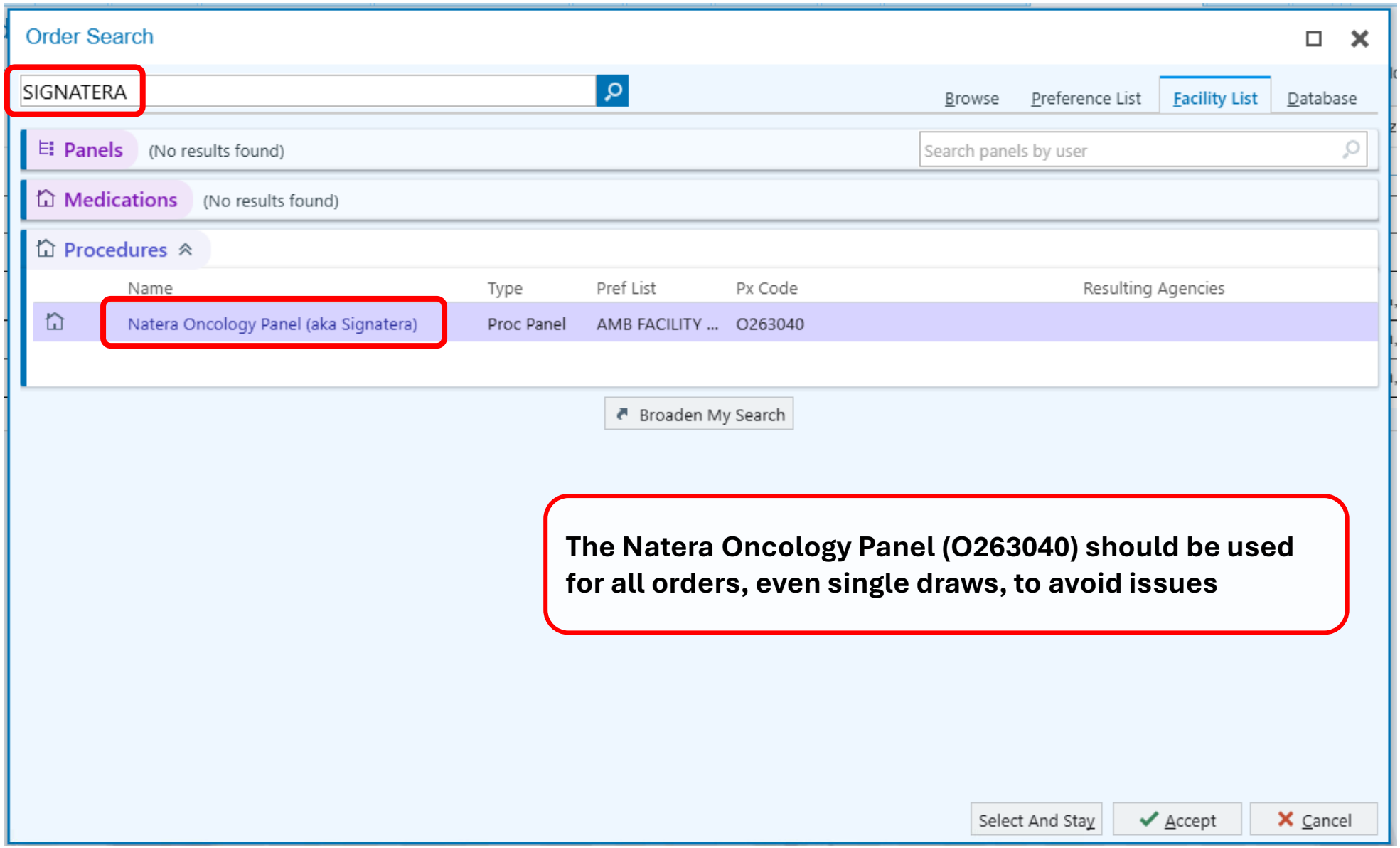
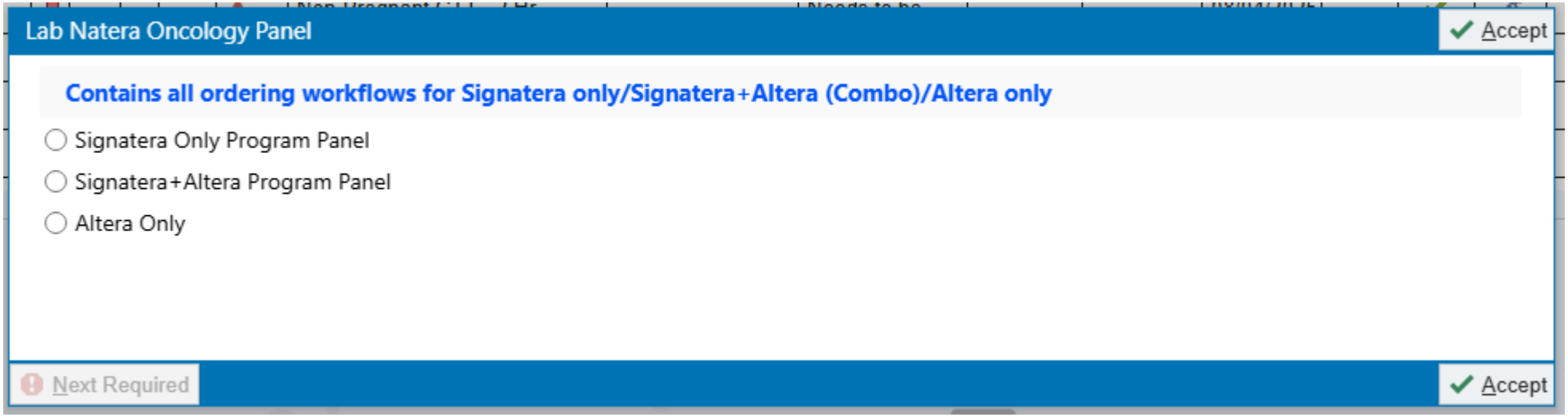
Placing Epic Orders for Signatera and Altera

Begin by searching for Natera Oncology, Signatera, or O263040 to pull up the order panel:

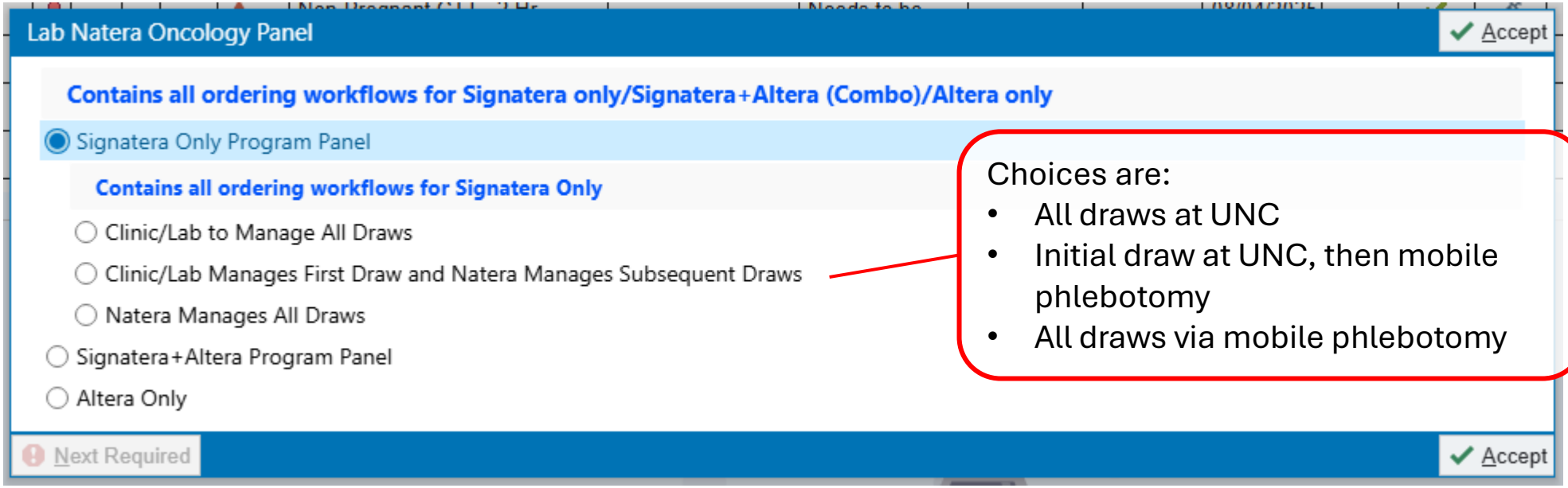


The Natera Oncology Panel (O263040) should be used for all orders, even single draws, to avoid issues

Choose test selection:



Next, choose draw method(s)***:

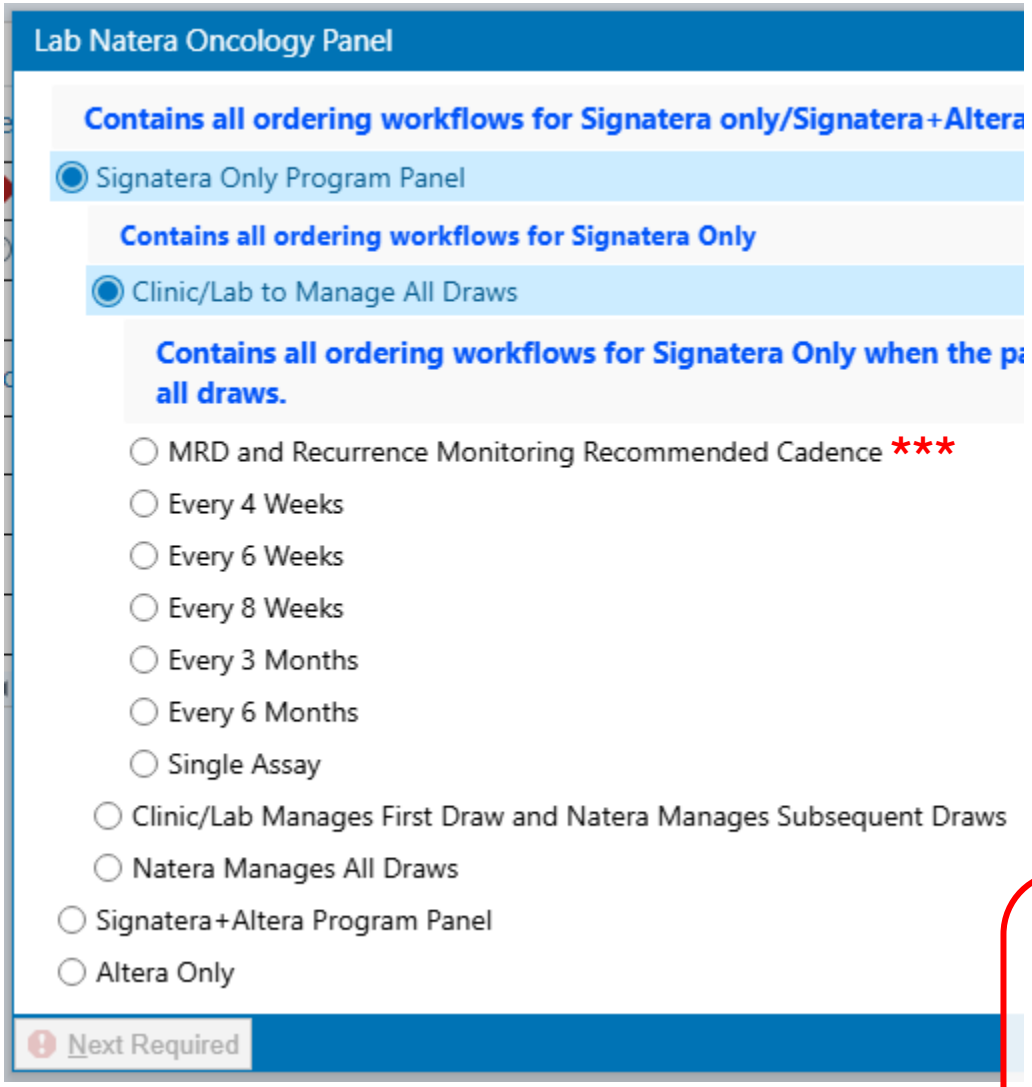


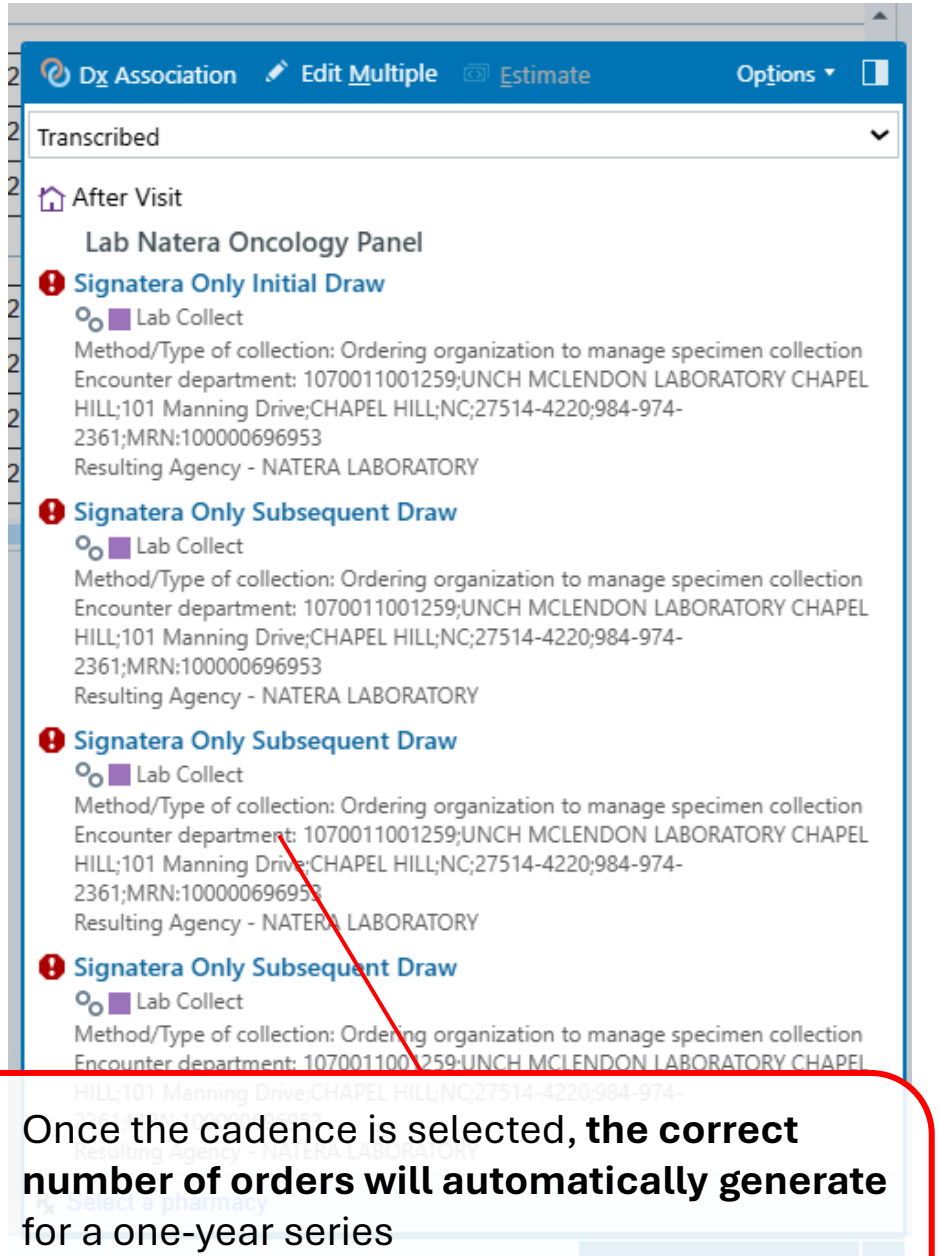
Choices are:

- All draws at UNC
- Initial draw at UNC, then mobile phlebotomy
- All draws via mobile phlebotomy

***** see page 10 for when draws alternate between UNC and Natera collection in a year or for custom cadences**

Next choose the desired cadence or single assay:

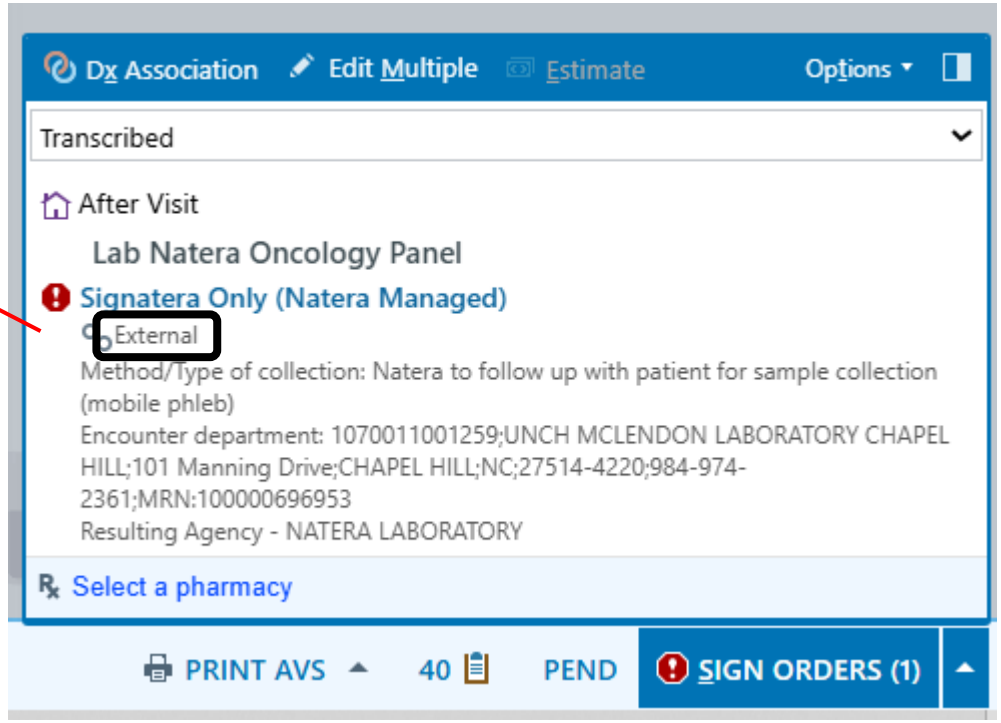


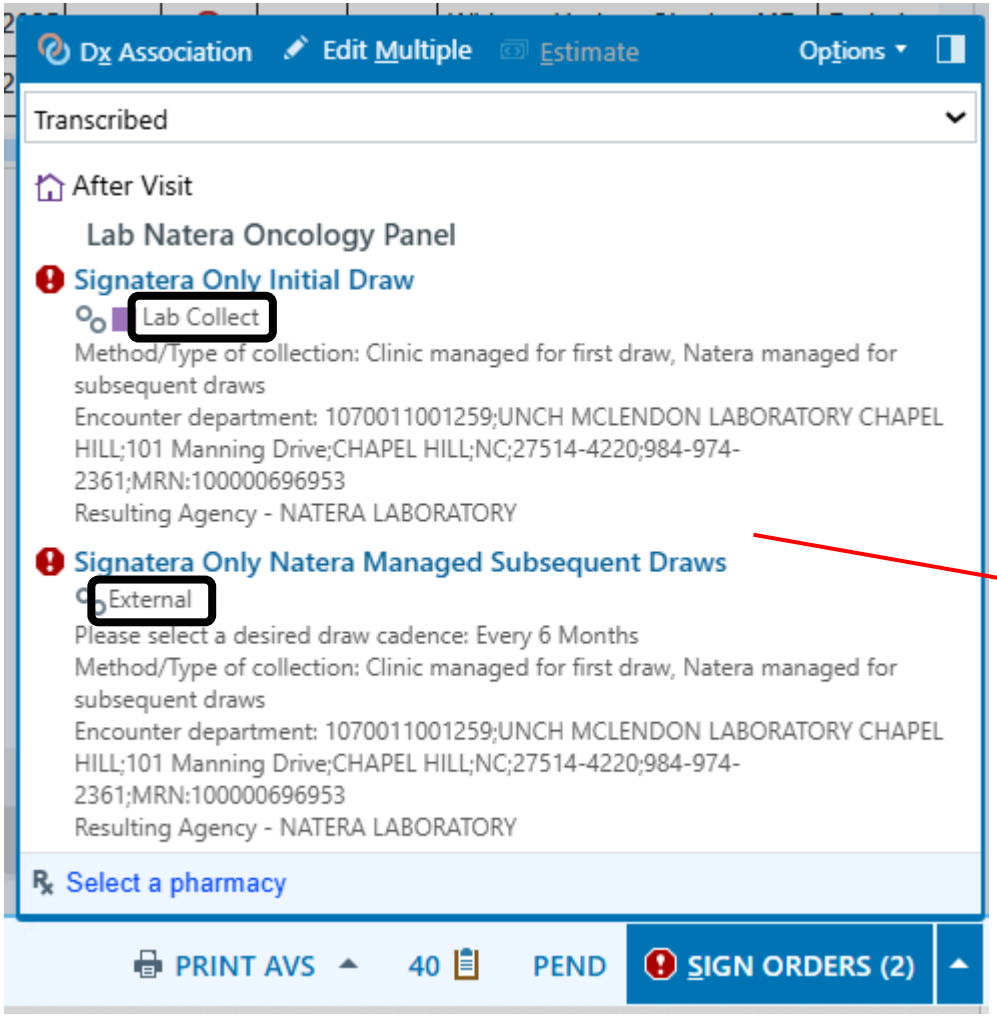


- Once the cadence is selected, **the correct number of orders will automatically generate** for a one-year series
- This example shows four orders, corresponding to every 3 months for all UNC draws
- More examples on the next page

***** see page 11 for guidance on MRD and Recurrence Monitoring Recommended Cadence**

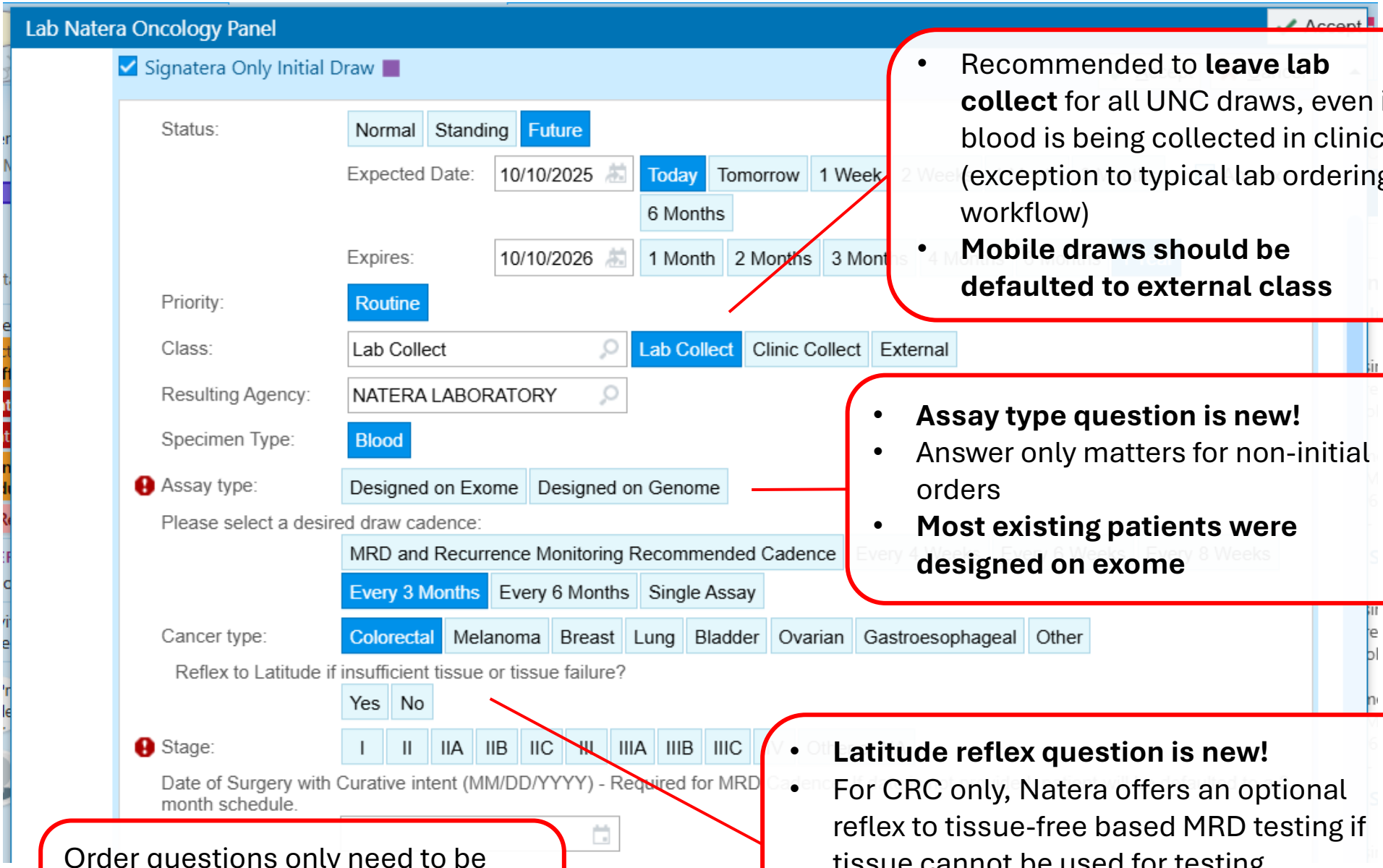
- When **Natara Manages All Draws** is selected, one order will appear with **external class** defaulted
- With the updated version, **only one order is needed for a series of mobile draws**, and results will be sent back as mobile draws are completed along the selected cadence





- For **initial draw at UNC then Natera Managed**, two orders will always generate regardless of cadence selection
- The **first order** corresponds to the initial UNC draw (defaulted **to lab collect**)
- The **second order** corresponds to all subsequent mobile draws (defaulted to **external class**), like the one order for Natera Manages All Draws
- Single assay is not a choice, given this method implies having subsequent draws

Once test and cadence have been selected, answer order questions (generally defaults should be left alone, especially cadence):



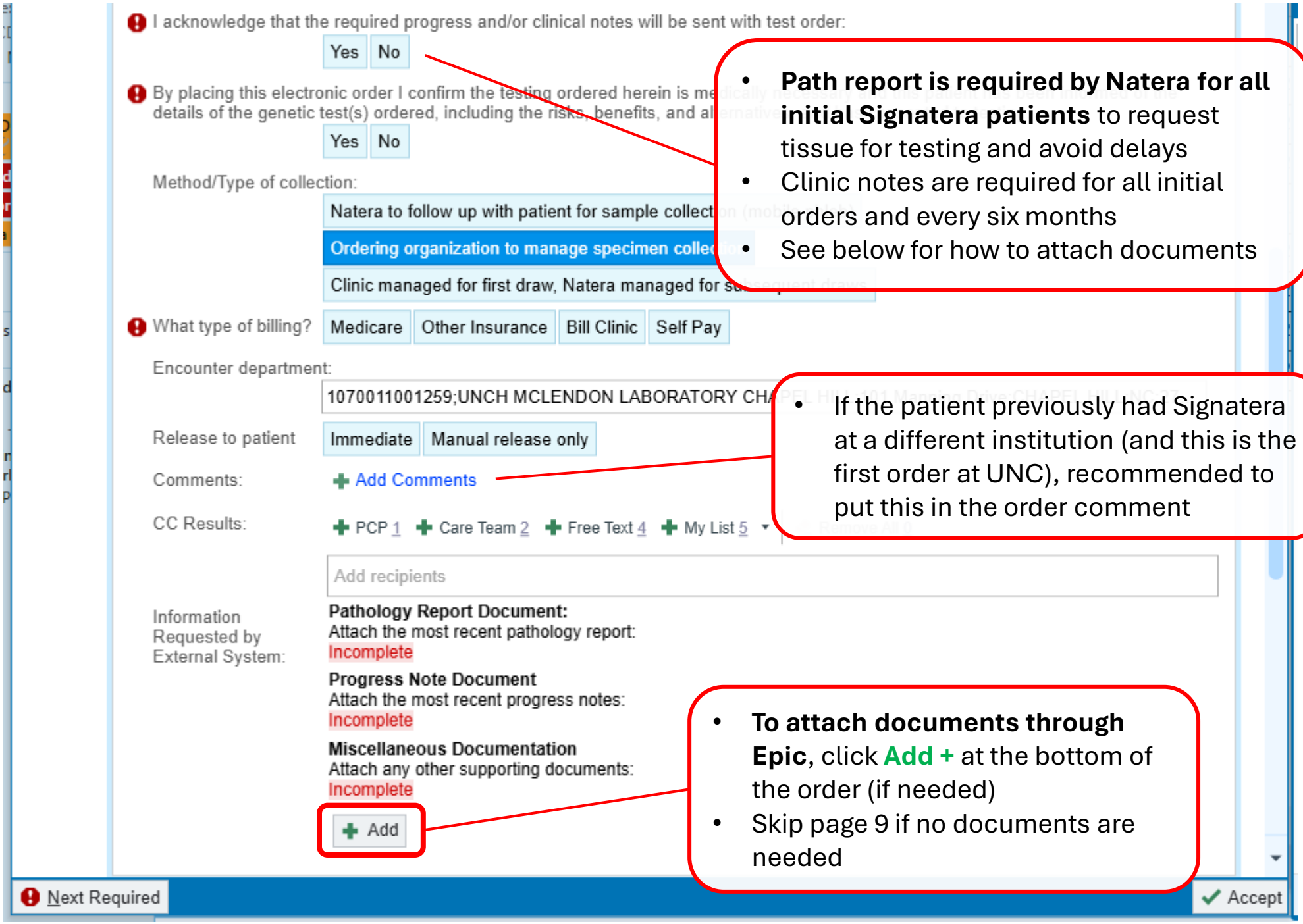
- Recommended to **leave lab collect** for all UNC draws, even if blood is being collected in clinic (exception to typical lab ordering workflow)
- **Mobile draws should be defaulted to external class**

- **Assay type question is new!**
- Answer only matters for non-initial orders
- **Most existing patients were designed on exome**

- **Latitude reflex question is new!**
- For CRC only, Natera offers an optional reflex to tissue-free based MRD testing if tissue cannot be used for testing
- **Note: CRC is not a default**, unlike the other selections depicted here

Order questions only need to be answered **once** per panel. Answers will carry over to all subsequent orders (if applicable).

Order questions (continued) and attaching documents:



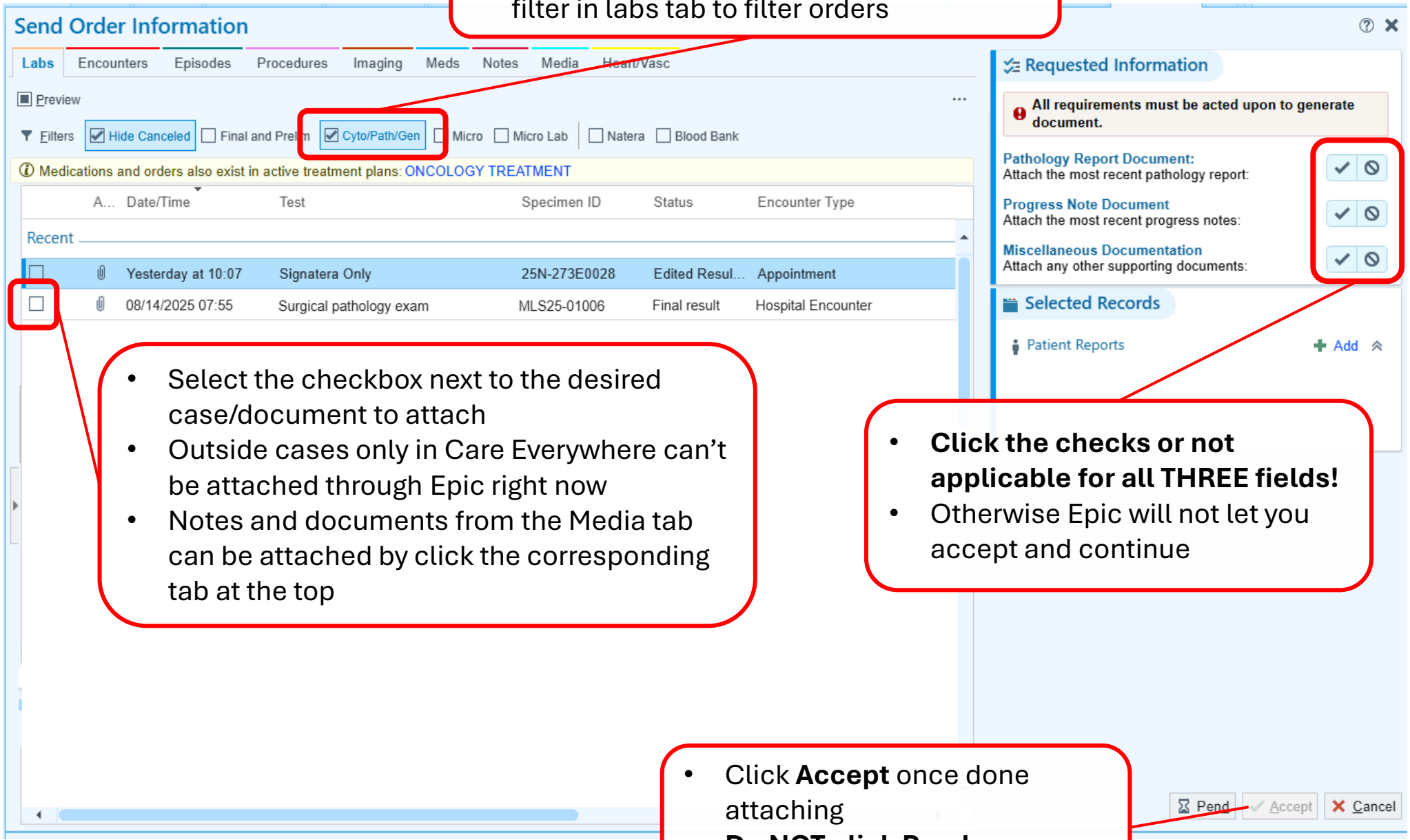
- **Path report is required by Natera for all initial Signatera patients** to request tissue for testing and avoid delays
- Clinic notes are required for all initial orders and every six months
- See below for how to attach documents

- If the patient previously had Signatera at a different institution (and this is the first order at UNC), recommended to put this in the order comment

- **To attach documents through Epic**, click **Add +** at the bottom of the order (if needed)
- Skip page 9 if no documents are needed

Attaching documents (current view), see next page for upcoming version:

- Starting with the **path report** (first Signatera draw only), click cyto/path/gen filter in labs tab to filter orders



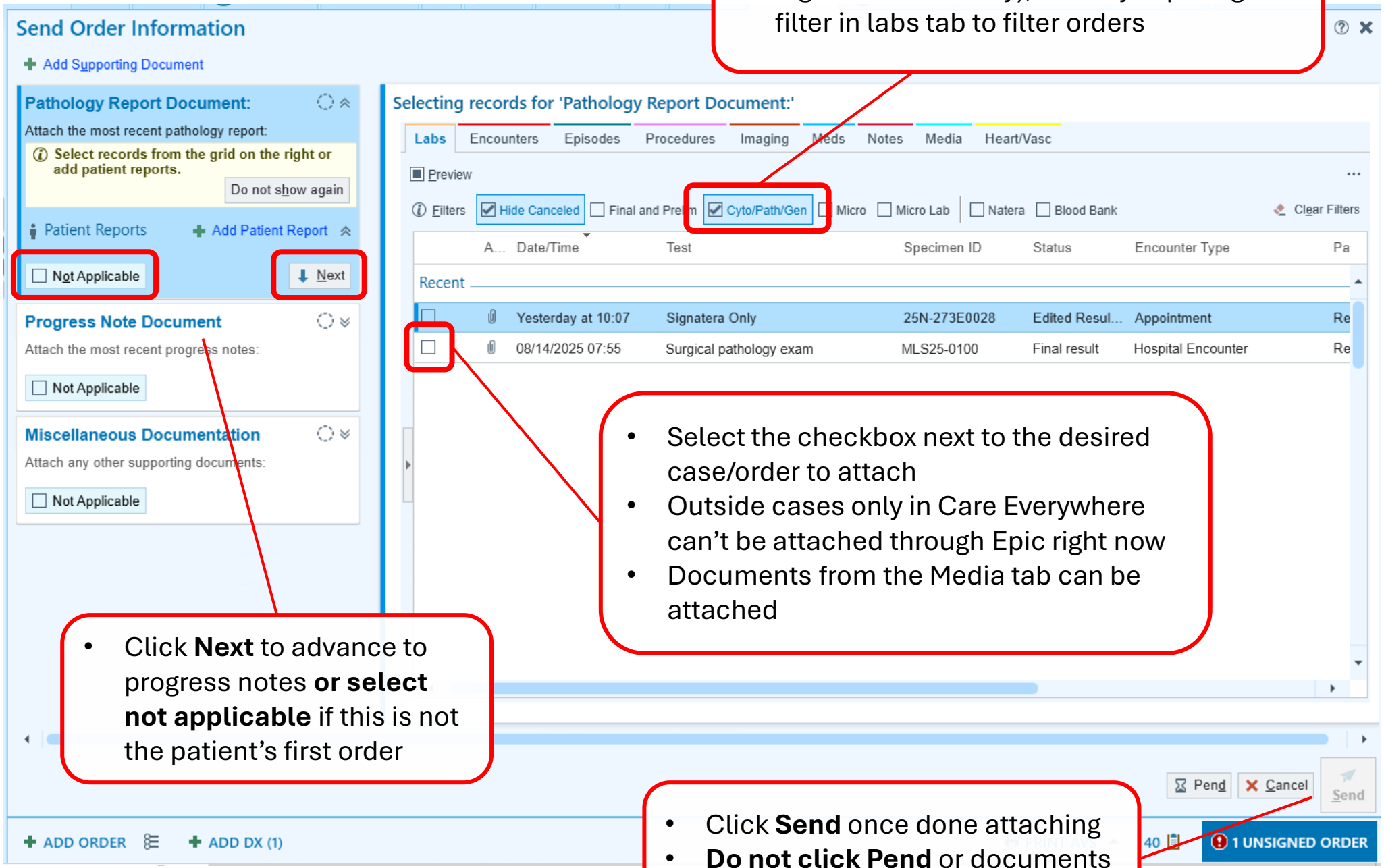
- Select the checkbox next to the desired case/document to attach
- Outside cases only in Care Everywhere can't be attached through Epic right now
- Notes and documents from the Media tab can be attached by click the corresponding tab at the top

- **Click the checks or not applicable for all THREE fields!**
- Otherwise Epic will not let you accept and continue

- Click **Accept** once done attaching
- **Do NOT click Pend** or documents will not transmit

Attaching documents (upcoming Epic upgrade):

- Starting with the **path report** (first Signatera draw only), click cyto/path/gen filter in labs tab to filter orders

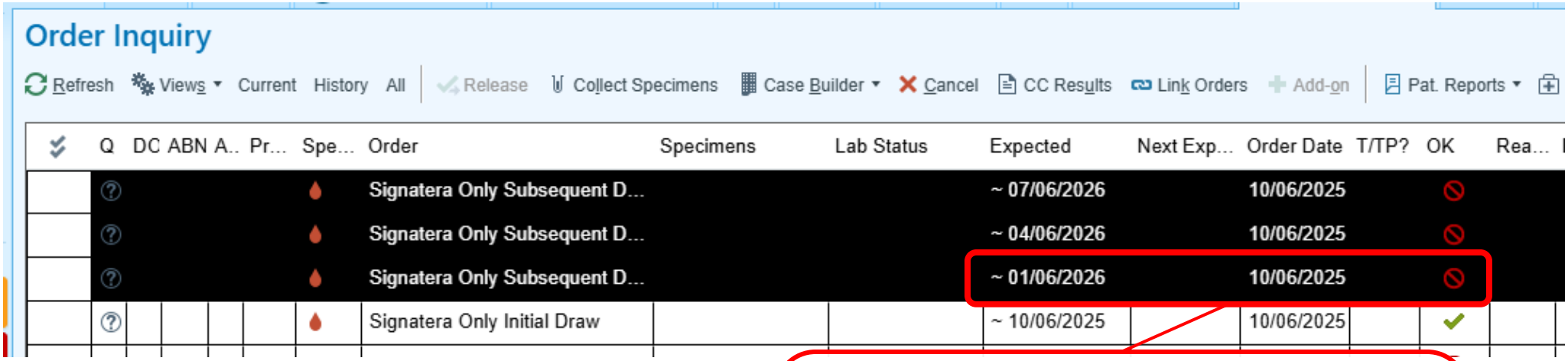


- Select the checkbox next to the desired case/order to attach
- Outside cases only in Care Everywhere can't be attached through Epic right now
- Documents from the Media tab can be attached

- Click **Next** to advance to progress notes **or select not applicable** if this is not the patient's first order

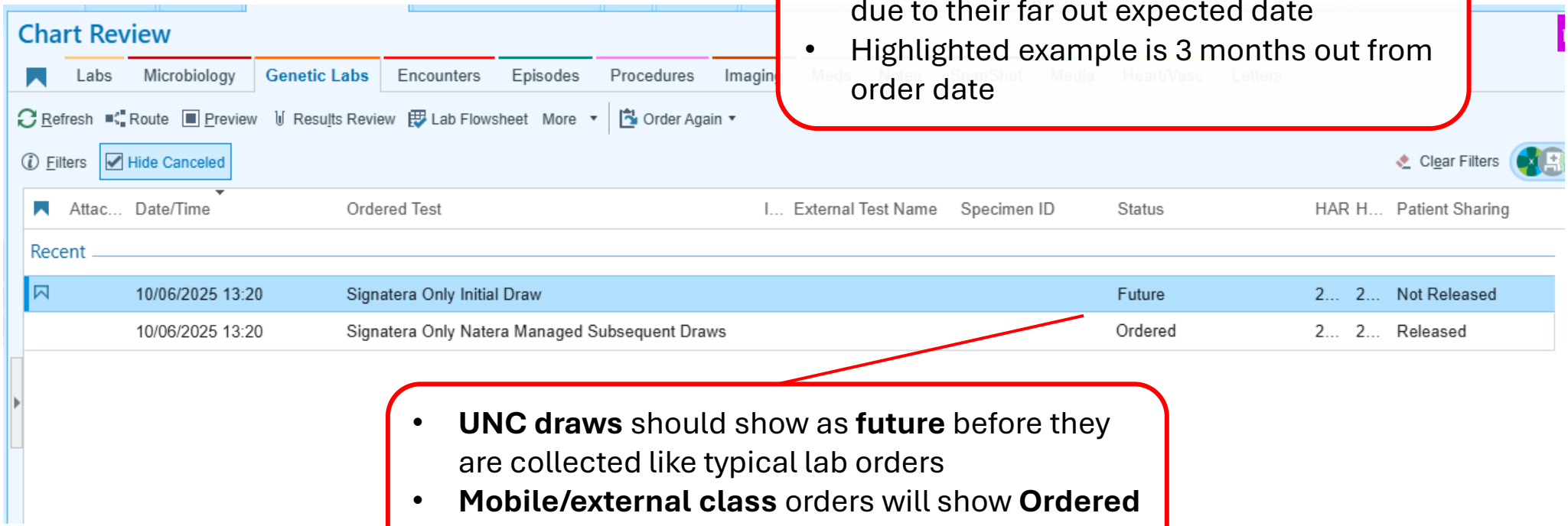
- Click **Send** once done attaching
- **Do not click Pend** or documents will not transmit

Once done attaching (if needed) and answering order questions, sign orders as per usual with lab orders. Example of order inquiry:



- Subsequent draws (UNC/lab collect) will show as not ok to collect in order inquiry due to their far out expected date
- Highlighted example is 3 months out from order date

Example of chart review:



- **UNC draws** should show as **future** before they are collected like typical lab orders
- **Mobile/external class** orders will show **Ordered** status in chart review under genetics labs

Nuances and changes to Signatera draw schedules:

- If a draw is being **changed from UNC collection to mobile** after orders have been placed, the corresponding Epic order needs to be changed to external class with Natera managed draw selected for method/type of collection.
  - Existing orders can be modified in order review, or they can be cancelled with a new single draw placed.

- If a draw is being **changed from mobile to UNC collection**, a new single draw with clinic/lab managed draw selected will need to be placed in Epic.
  - If the mobile draw being changed was in the portal, this will need to be cancelled in the portal.

- If draws will **alternate between UNC and mobile**, place a panel order that is closest to the intended schedule and modify the orders as needed per above.
  - For example, if you want to do initial draw at UNC, then mobile in 3 months, then UNC again in 6 months, and mobile again in 9 months, you should place a panel order with every 3 months for cadence, initial draw at UNC then Natera managed. Then later place a single order for the UNC draw at 6 months, following how to change a draw from mobile to UNC collection.

- If draws will follow a **custom cadence** (not one of the established cadence choices), placing a single draw order at the desired time of each draw is best.

Nuances and changes to Signatera draw schedules (continued):

- The **MRD and Recurrence Recommended Monitoring Cadence** corresponds to 4 draws in the first 6 months after surgery, every 3 months between 6 months and 2 years after surgery, and every 6 months 2 years after surgery
  - When **ordering in Epic for UNC only draws for this cadence**, the panel defaults to six draws (4 in the first 6 months and 2 every 3 months), which is the correct schedule only when the patient has just had surgery
    - **If the surgery was between 6 months and 2 years ago**, do not choose this cadence and instead choose every 3 months for cadence, otherwise too many orders will generate (6 instead of 4) and with the wrong spacing/expected dates (first 4 draws will not be spaced every 3 months)
    - **If the surgery was greater than 2 years ago**, again avoid choosing this cadence and instead choose every 6 months (or every 3 months if more draws are desired)
  - **This is not an issue for initial draw at UNC then mobile or all mobile draws**, since there will only be one order for the subsequent mobile draws

- Due to limitations with Epic, **multiple primary patients** will only have one set of orders and results in Epic through the interface
  - Epic will only prompt one set of tubes to be collected (despite needing two for these patients), so advance notification/awareness is needed for UNC collection
  - Two sets will be drawn by mobile phlebotomists for these patients, even with one Epic order since there will be two orders in Natera's system

General Information:

- Initial Signatera draws require 2 Streck tubes and a purple/EDTA tube, while subsequent draws only required 2 Streck tubes. It is **recommended to draw all 3 tubes** each time to avoid issues.
  - Multiple primary patients require 4 Streck tubes (see page 10)
  - Streck tubes should not travel through the tube station since they are glass and will break coming from the carriers
  - Referral Testing will handle shipping samples to Natera

- Try to place Epic orders as close as possible to the first draw date of the series, otherwise expected draw dates may be incorrect

- Series should be **renewed** in Epic rather than the Natera portal

- If orders get off cadence, it is recommended to cancel all subsequent orders to return to the intended cadence (orders need to be cancelled or expected dates adjusted in Epic for UNC draws)

- Orders placed in Epic should receive results through the interface automatically, rather than needing manual uploads in the media tab

- Outside of clinic, Signatera can be collected at main phlebotomy in the medical center, Eastowne, and Hillsborough