# Family History Tool User Guide

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If you have any questions, please email familyhistory@invitae.com.
Creating an account

You can create an account by selecting the “Sign Up” option on the Family History Tool welcome screen.

Sign up

Sign up for an account

With an Invitae account, you’ll be able to:

- Track the status of your order in real time
- View and download results as soon as they’re ready
- Capture family medical history with our Family History Tool
- Access helpful resources and tools

You can create an account even before your healthcare provider orders your test, to get started today.
Retrieving an account password

You can retrieve an account password by selecting “Forgot Password” on the Family History Tool welcome screen.
Starting a new pedigree and sending a patient questionnaire

There are three ways to start a new pedigree:

1. From the Privacy screen that appears after logging in, select “Start New Pedigree.”

2. From the Pedigree List screen, select “Add Pedigree” in the panel on the left.
3. You can also start a new pedigree by sending a questionnaire directly to your patient.

From the Pedigree List screen, select “Questionnaires” at the bottom of the left panel, and then select “Send Questionnaire.”

In the “Send Questionnaire” box, you can either copy the URL and share it with your patient or you can send an email inviting your patient to fill out the questionnaire.

If you choose to send an email, you can personalize it with a photo of yourself or your clinic’s logo. This image will appear at the top of your patient’s questionnaire screen. You can also select whether to send the questionnaire in English or Spanish.
The questionnaire collects the following information: name, gender, DOB, height, weight, racial group, ancestry category, reproductive history, cancer history, previous genetic testing, preventative surgery, and immediate family (including nieces, nephews, cousins, and half-siblings). Your patient has the ability to save progress on the questionnaire and resume entering information at a later time. Once your patient completes the questionnaire, a digital pedigree will automatically be rendered. You will also receive an email notification that the questionnaire has been completed and a checkmark will appear next to that questionnaire in the app.
Importing a pedigree

The web version of the Family History Tool also allows you to import GEDCOM, HL7, and XML pedigree files. After creating a new Family History Tool pedigree using option 1 or 2 above, select “Import Pedigree” from the “Actions” menu on the Pedigree Template screen. You will then be prompted to select the file you would like to upload.

Note: At this time, the import option is only available for the web app.

Select file to upload or drag and drop pedigree file

we are supporting following types of files

- GEDCOM
- Health Level 7
- Progeny
Adding a family member to a pedigree

To add a family member to a pedigree, navigate to the editor window. Click on an individual in the pedigree and select the type of relation you would like to add.

To add twins or other multibirths, click the “Add/edit multibirth” button. This will allow you to toggle multibirths on or off, and select whether the multibirths are identical, fraternal, or unknown.
To add multiple people at once, right-click and the ability to add multiple individuals will display. (If using an iPad, tap and hold.)

To add a partner relationship between two individuals already in the pedigree, select the icon circled in red at right. The tool will allow you to select any other individual as a partner.
To indicate half-siblings, click and hold over the box representing the child while dragging the box elsewhere. Blue and yellow boxes will appear.

To assign the child to a new parent, drag the box representing the child to a blue box.

To reorder siblings, drag the box representing the child to a yellow box.
Editing a relationship

To edit the relationship between individuals, click the line connecting them. From here you can indicate consanguinity and whether they are current or former partners.

To add more complex consanguineous relationships, click on one of the two individuals on the pedigree screen and select the icon circled in red at right. The tool will then allow you to select any other individual as a partner.
Adding ancestry

You can add ancestry to the maternal and paternal branches of a family by clicking on the “Ancestry: Unknown” button at the top of the pedigree template.

You can also add ancestry to a particular individual by clicking on the individual and selecting the “+ Add New Field” button in the panel on the right.
Adding a condition or phenotype to a person

To add a condition, phenotype, ancestry, or country to a particular individual, select the individual (indicated by the dotted box surrounding that individual's symbol) and click the “+ Add New Field” button in the panel on the right.
To change the color of individuals with a specific condition, first make sure they have been labeled as having a condition through the “+ Add New Field” option. Then select the “Config” tab in the bottom right corner, and then in the right panel click on the color you would like to change. This same menu also allows you to toggle between color and black & white. You can also change the condition color directly from the “Person” tab by clicking on the condition color box.
Adding a note

You can apply a note to the entire pedigree by selecting the “Notes” tab in the panel on the right.

You can also apply a note to a specific individual by selecting the “+ Add New Field” button in the panel on the right and clicking the “+ Add Note” button.
Exporting a pedigree

There are two ways to export a pedigree:

1) By clicking the “Download” button on the Pedigree List screen

2) By clicking the “Actions” button from the Pedigree Template screen and selecting “Download Pedigree”
The iPad version offers the ability to email pedigrees; the web version offers the option to email the pedigree or download it as a PDF, PNG, or CSV file. When you download the pedigree using the web version, you can also choose to number generations and individuals within a generation by selecting the “Add individual numbering” option. In addition, you can download a de-identified pedigree by selecting the “De-identify pedigree” option.

In order to print large pedigrees across multiple pages, simply drag the slider bar below the image of the pedigree to the desired number of pages. The font size and layout will adjust accordingly.
Printing a pedigree

To print a pedigree, click the “Actions” button from the Pedigree Template screen and select “Print Pedigree.”
Sharing and collaboratively editing a pedigree

There are two ways to share a pedigree:

1) By clicking the “Share” button on the Pedigree List screen.

2) By clicking the “Actions” button from the Pedigree Template screen and selecting “Share Pedigree.”
In both cases, you will be prompted to enter the email address of the user with whom you would like to share the pedigree.

Once shared, the pedigree appears in that user’s account. You can now both edit the same pedigree simultaneously; any changes to the pedigree are reflected in both accounts.

A revision history audit trail tracks changes made to the pedigree, when, and by whom. This allows users to revert back to an older version of the pedigree if needed.
Duplicating a pedigree and reassigning the proband

There are two ways to create a new pedigree with existing content:

1) By clicking the “Change Proband” button on the Pedigree List screen

2) By clicking “Change Proband” from the “Actions” menu on the Pedigree Template screen
Once you select “Change Proband,” you will be asked to select the new proband for whom a new pedigree will be created. Once you select “Done,” the new pedigree will be created and added to your Pedigree List.

This process will not delete or affect the original pedigree. Please note that any changes made to the new pedigree will not be reflected in the original pedigree.
Configuring display options

You can modify the amount of information displayed on the Pedigree Template screen by clicking the “Config” tab in the panel on the right.

Zoom tools can be found in both the upper left corner and bottom center of the pedigree tool. The “re-layout” option moves individuals into the simplest organization. To override the “re-layout” function, simply click and drag an individual to another location.
Automatic lock screen

To preserve confidentiality, the Family History Tool will automatically lock if inactive for 30 minutes in the web version or 10 minutes in the iPad application. Type in your password to unlock the screen.
Ordering a test

You can order a test from Invitae by clicking the “Order Tests” button on either the Pedigree List or Pedigree Template screens.

This will redirect you to the Invitae catalog. You will be automatically logged in and your patient’s information will already be entered.