Family History Tool
User Guide
Invitae Family History Tool User Guide

Table of Contents

Creating an Account ....................................................................................................................... Page 3
Retrieving an Account Password ................................................................................................... Page 4
Starting a New Pedigree and Sending a Patient Questionnaire .................................................. Page 5
Adding a Family Member to a Pedigree ..........................................................................................Page 8
Editing a Relationship .................................................................................................................... Page 9
Adding Ancestry ............................................................................................................................ Page 10
Adding a Condition or Phenotype to a Person .............................................................................Page 11
Adding a Note ..................................................................................................................................Page 13
Conducting a Cancer-Focused Risk Assessment ..........................................................................Page 14
Exporting a Pedigree ....................................................................................................................... Page 16
Printing a Pedigree ..........................................................................................................................Page 18
Sharing a Pedigree ..........................................................................................................................Page 19
Configuring Display Options .........................................................................................................Page 20
Automatic Lock Screen .................................................................................................................Page 21
Ordering a Test ................................................................................................................................Page 22

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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.
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 “New 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 personalize the questionnaire with a photo of yourself or your clinic’s logo. This photo will appear at the top of your patient’s questionnaire screen. (Note: At this time, the photo option is only available when using the web app.)
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. Once your patient completes the questionnaire, a digital pedigree will automatically be rendered.

Once your patient has completed the questionnaire, you will receive an email notification and a checkmark will appear next to that questionnaire in the app:
Adding a Family Member to a Pedigree

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

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, right click on one of the individuals and select “+More” button in the “Partners” section. Then select the icon circled in red below. The tool will allow you to select any other individual as a partner.
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 “+ More” button on the “Partners” section. The icon at the bottom with two symbols connected by a line will allow you to select any other individual as a partner.
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, 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.
You can conduct a cancer-focused risk assessment by selecting the “Show Risk Panel” button in the lower left corner of a pedigree:

After accepting the terms of use, clicking on each condition in the leftmost panel will display carrier probability (across all genes), lifetime and five-year risk, as well as a comparison to the average population. The risk model and version used to calculate risk are displayed in the bottom right corner of pop-up window. Note that the risks that appear in the panel are only for the proband:
To improve risk assessment, fill out the pedigree as fully as possible. Anywhere that a red circle with an exclamation mark appears, more information (such as age and gender) would improve the assessment.

Each time you add additional information to the pedigree, the risk assessment is automatically updated.
Exporting a Pedigree

There are two ways to export a pedigree:

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

2) By clicking the “Actions” button from the Pedigree Template screen:
While the iPad version only offers emailing deidentified pedigrees, the web version offers the option of downloading the pedigree as a PDF, PNG or FHD. You can also choose to number generations and individuals within a generation by selecting the “Numbering of Individuals” option:
Printing a Pedigree

There are two ways to print a pedigree:

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

2) By clicking the “Actions” button from the Pedigree Template screen:
Sharing a Pedigree

To share a pedigree, click the “Actions” button from the Pedigree Template screen and select “Share Pedigree.”

You will be asked to enter the recipient’s email address as well as a personal message. This will generate an automated email like the one below. Note that if the recipient already has an Invitae account, you will need to share the pedigree with them at the email address they used to set up their Invitae account for them to receive the pedigree. If they do not yet have an account, they will be prompted to create one using the email address with which you shared the pedigree.

Dear [Recipient],

[Name] has shared a pedigree with you using Invitae’s Family History Tool. In order to access this pedigree, simply log in with your Family History Tool account and click “Accept.” Once you have accepted the pedigree, you will be able to view, save, edit, and share it with others.

Don’t have an account? Don’t worry - you can create one on the spot and the pedigree will automatically be added to your account.

[Open pedigree]

Comments from [Name]

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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.
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.