

# PA Case Management System (iCMS) SaaS Implementation

## Pediatric Immunology & Endocrinology Treatment Centers Training

## What is iCMS?

- Internet Case Management System (iCMS), a web-based software application
- Used by the Pennsylvania Department of Health's Division of Newborn Screening and Genetics (DNSG) for case management, tracking and managing the follow-up of newborn filter paper and point-of-care (POC) screening results for infants born/residing in PA
- Developed and supported by Neometrics, a division of Natus



## Service Vendor

- Neometrics, a Division of Natus, incorporated in 1978
- Based in Hauppauge, NY
- Staff has over 100 years of experience in newborn screening and data management
- Market leader in newborn screening software for:
  - Testing, reporting and case management
  - Electronic data transfer (via HL7)
  - Federal reporting





# Implementation Coordinator and Trainer

**Lisa Hudson**, Applications Systems Analyst II and Certified HL7 Control Specialist, has over 20 years of public health systems experience

Responsibilities include:

- Provide assistance and training to existing clients (users and IT staff)
- Provide technical expertise on application, network and database issues
- Create user manuals, documentation and training materials
- Training

**Lisa Hudson**

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## PA DNSG

**Kelly Holland**, Public Health Program Director - [kholland@pa.gov](mailto:kholland@pa.gov)

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# Training Plan

- Complete Webinar Training
- Answer Webinar Review Questions
- Submit Answers and Request for Login
- Go Live!

# Implementation Goals

Provide a *single comprehensive* data system that:

- supports the newborn metabolic, hearing and critical congenital heart defects (CCHD) screening follow-up programs
- supports unlimited DOH and external users, with different scopes and levels of access based on their roles
- provides fast and accurate identification of infants and their newborn screening results
- provides a secure interface for exchanging protected health information (PHI) with the contracted laboratories, submitters and treatment centers
- increases timeliness and efficiency of follow-up and reporting

# Implementation Plan

- ✓ **Phase I:** Laboratories are able to send newborn filter paper screening data to iCMS, using HL7 messaging. DOH users are able to perform newborn screening follow-up activities and run reports in iCMS. An ad-hoc reporting tool is also provided for DOH to build custom reports, as needed.
- ✓ **Phase II:** Treatment Centers (TCs) are provided access to iCMS for *specified* diagnostic follow-up activities and hospitals, midwives and birthing centers are able to manually enter or electronically submit hearing screening data to iCMS.

## Current Phase

- **Phase III:** Audiologists, Cardiologists and other health care professionals working with the newborns are provided access to iCMS for *specified* in-patient and out-patient diagnostic evaluation follow-up activities.





## Phase III Objectives

- Bring the Pennsylvania newborn screening and genetics program ***ahead*** of other newborn screening and genetics programs across the country.
- Eliminate the need for the current email of workbooks between state and all Health Care Professionals (HCP)s.
- Provide HCPs and other outside providers direct access to referred cases for easy and quicker reporting of diagnostic results, leading to timely follow-up and treatment.

## Data Entry Learning Objectives

- Be able to access and log into the PA iCMS
- Be able to search and find a newborn in the system
- Use PA iCMS to view the results from newborn's screenings
- Use PA iCMS to view a newborn's case information, such as, contacts, appointments, referrals, diagnoses etc.
- Use PA iCMS to track and complete referrals
- Use PA iCMS to track and complete diagnostic evaluations
- Learn how to create user accounts in PA iCMS for other users
- Be prepared to train other users on how to use the system
- Feel comfortable using PA iCMS

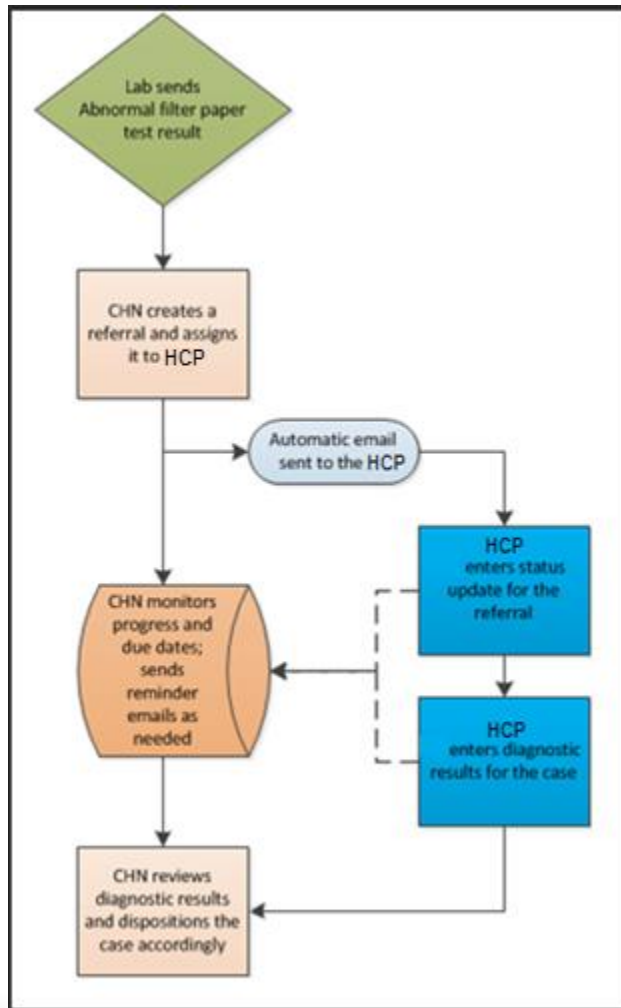


## iCMS Concepts

- Work grids
- PHI and emails (trusted sender Neometrics.com)
- Individual logins

# Let's Get Started...

# Referral-Diagnosis Work Flow



## Current Process

- CHN creates a referral in iCMS and emails a workbook to the HCP
- HCP submits status information via email and CHN enters it into iCMS
- HCP submits diagnostic workbook via email and CHN enters it into iCMS

## To-Be Process

- CHN creates the referral in iCMS and an automatic email notification is sent to the HCP
- HCP completes the referral or cancels it in iCMS
- HCP enters the diagnostic results directly in iCMS

# New Referral-Diagnosis Work Flow

- The MS Excel workbooks will no longer be needed
- HCPs will have direct access to the system, to provide status update and enter diagnostic results for assigned cases
- HCPs will be notified by an automatic email when a new referral is assigned to their facility
- Expected response time for status updates and final diagnosis will vary based on the disorder

Disorder	Max # of Days to Update Referral
CAH	within 4 days of referral
CH	within 4 days of referral
SCID	within 4 days of referral

- HCP users will have the ability to log into iCMS at any time to access new and pending referrals, cases that need final diagnosis and completed cases for their facility



# Referral Email

From: customersupport@neometrics.com  
To:  
Cc:  
Subject: Newborn Screening Referral from PA DOH

You are receiving this email because a referral was made to your facility for a condition listed on the Pennsylvania Newborn Screening Panel. Please log into the Pennsylvania Department of Health's newborn screening case management system, iCMS, to view the case details.

You must update the referral in iCMS with initial contact and initial assessment information. Once a diagnosis is determined, you must enter the Diagnostic Results in the system, no later than ten business days following the date of diagnosis.

Please do not hesitate to contact the Newborn Screening Follow-up Program with any questions or concerns, by calling 717.783.8143.

[Click here](#) to access this information.

*Healthcare practitioners, including physicians and surgeons, and healthcare facilities, including birthing centers and hospitals, are required to report final diagnoses of certain diseases in the newborn child to the Pennsylvania Department of Health, Bureau of Family Health, Division of Newborn Screening and Genetics; (see 35 P.S. §521.16; 28 Pa. Code §27.1; 28 Pa. Code §27.30; 28 Pa. Code §27.21a; and effective July 1, 2009 35 P.S. §623).*

## **NEWBORN SCREENING & FOLLOW-UP PROGRAM**

Pennsylvania Department of Health Bureau of Family Health | Division of Newborn Screening and Genetics  
625 Forster Street, Seventh Floor East | Harrisburg, PA 17120  
Phone: 717-783-8143

- Referral creation will send an automatic email to all affiliated designees
- “[Click here](#)” will open the iCMS login page
- Please Note the email is from: [customersupport@neometrics.com](mailto:customersupport@neometrics.com)



## Defining Users, Affiliations and Designees

- HCP + Disorder identifies the provider
- Every user is affiliated to the provider(s)
- Every user is assigned a role that limits what they can see and do
- Not every user is a designee
- Designees receive the referral emails (Limit 5)
- Administrator users for a provider can configure new users for that provider



# Login



Pennsylvania Department of Health  
Bureau of Family Health | Division of Newborn Screening and Genetics  
625 Forster St. | Seventh Floor East, Health and Welfare Building | Harrisburg, PA 17120  
Phone: 717-783-8143 or 877-724-3258 Fax: 717-724-6995  
Web: www.health.pa.gov



## iCMS Browser Requirements

Please enable Compatibility Mode for this site. (IE Users)  
Ensure iCMS is set as a Trusted Site. (IE Users)  
Download and Open the Quick Patch to update your browser.  
Make sure your browser's Popup Blocker is turned off.  
It's recommended to turn off header/footer for letter printing.

User Name

Password

Login

[Forgot your password?](#)

**Supported Web Browsers: IE v10 and higher**

**User Tip: TURN OFF the pop up blocker on first login**

**If you forget or misplace your password:  
Click "Forgot your Password?"  
You have 5 attempts before you are locked out.**

**Add 'nbs.pa.gov' to the list of trusted sites on your workstation onsite.**

URL For Production:

<https://nbs.pa.gov/toolbar/login.aspx>

IE must be run in compatibility mode:

Tools -> Compatibility View Settings

Add this website -> Click "Add"

## Password Criteria

- Passwords must have 8 characters including an uppercase, lowercase, numeric and a symbol
- Password can not be one that was previously used within last 180 days
- Users can only change their password 1 time every 15 days
- HCP Administrators can reset a user's password at any time
- Temporary password is good for 14 days
- Password reset is required every 60 days

# User Terms and Conditions

- Users must agree to these terms and conditions to access iCMS

## Attention



### Pennsylvania Internet Case Management System

#### User Terms and Conditions

By using the Pennsylvania Internet Case Management System (PA iCMS), you attest to the following:

#### AUTHORIZED ACCESS

- 1) I attest that the information I provided during registration is my own and is true and accurate to the best of my knowledge.
- 2) I attest that I am legally authorized to access the PA iCMS.
- 3) I understand that PA iCMS usernames and passwords are assigned to individuals and not to facilities. All authorized users must have their own accounts using their own credentials. Usernames and passwords cannot be shared. Any violations of username and password security may result in revocation of direct access.
- 4) I understand that I am only permitted to use the PA iCMS for the reasons explicitly stated in the Infant Hearing Education Assessment, Reporting and Referral (IHEARR) Act, 11 P.S. §§ 871-1 et seq.; the Newborn Child Testing Act, 35 P.S. §§ 621 et seq.; 28 Pa. Code Chapter 28; and, the Newborn Child Pulse Oximetry Screening Act, 11 P.S. §§ 878.1 et seq.
- 5) I agree to report any suspected breach or unauthorized access of the system to the Pennsylvania Newborn Screening Program immediately.

#### CONFIDENTIALITY

- 6) I understand that the data from the PA iCMS is protected patient health information and any information accessed must be treated as confidential as required by the authority cited in paragraph 4 above.
- 7) I understand that any person who unintentionally or intentionally makes an unauthorized disclosure of information from the PA iCMS may be subject to civil and criminal penalties.
- 8) I agree to abide by all rules and regulations set forth in the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and any subsequent amendments.

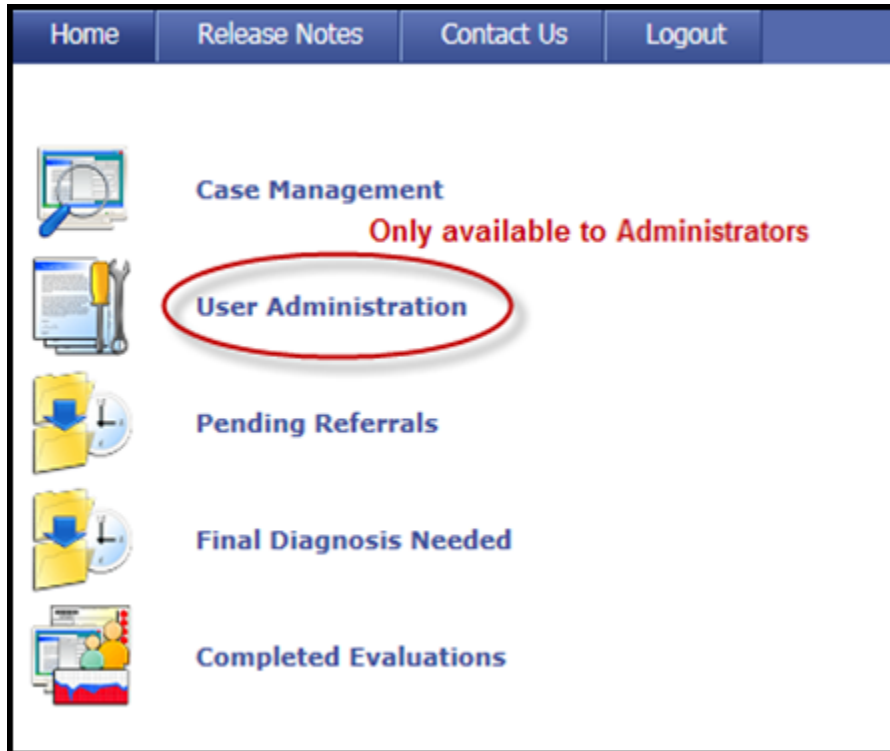
#### GENERAL TERMS AND CONDITIONS

- 9) I accept the above conditions and certify that I am a healthcare professional authorized to access the PA iCMS.

☒ Agree
 ☐ Do Not Agree

Submit

# Landing Page



## Top Toolbar:

- **Home (Landing Page)** – Daily tasks and system options
- **Release Notes** – Training Materials
- **Contact Us** – Newborn Screening home page
- **Logout** – Exit out of iCMS

## Pending Referrals



- Link to all new and pending referrals
- Records based on role and affiliation, so users only see babies/referrals assigned to their facility for their disorders

# Pending Referrals

**Search Filter**  
Enter the required search criteria below.

Start Date  End Date

Pending Referrals - By Referral Date

Drag a column header here to group by that column

Select	Med Rec #	Newborn Id	Infant Last N	Infant First N	Name at Disch	DOB	Gender	Birth Order	Mother Last Na	Mother First Name	Submitter Hosp	Referral Date	Referral Type	Status Due D	CHN
Select		PA1				03/14/20	Female	Not Multiple Bir			Gentle Delivery	03/27/2019	SCID - Immunolo	03/31/2019	Angela Collins
Select	595	PA1				03/04/20	Male	Second Multiple			Geisinger-Wyon	03/27/2019	SCID - Immunolo	03/31/2019	Janine Strick

- Displays all referrals assigned to the HCP and disorder, awaiting an update
- Defaults to referrals created in the past 90 days
- Overdue cases highlighted in yellow
- Use the filter options on the top to change the default settings



# Pending Referrals

Pending Referrals - By Referral Date

Export to Excel

Filter on a specific value entered into the column

Sort the column in ascending order by clicking on the column header. Click the column twice to sort descending

Drag a column header here to group by that column

Select	Med Rec #	Newborn Id	Infant Last N	Infant First N	Name at Disch	DOB	Gender	Birth Order	Mother Last Na	Mother First Name	Submitter Hosp	Referral Date	Referral Type	Status Due D	CHN
Select		PA15K	PEAO			03/14/20	Female	Not Multiple Bir	PEACH		Gentle Delivery	03/27/2019	SCID - Immunolo	03/31/2019	Angela Collins
Select		PA16K	MAGA			03/04/20	Male	Second Multiple	MAGA		Geisinger-Wyon	03/27/2019	SCID - Immunolo	03/31/2019	Janine Strick

Click the arrow on the column to see the available values to filter

Click the Key to select other filter options

Filter options: (All), Female, Male

Sort options: Begins with, Contains, Ends with, Equals, Doesn't equal, Is less than, Is less than or equal to, Is greater than, Is greater than or equal to

- The filter and sorting options described for this grid can be used throughout iCMS
- The “Export to Excel” will take all data displayed on the grid and create an excel file. This option also appears on all iCMS grids. When selected, a popup message will display at the bottom of the screen:

Do you want to open or save **Export\_8\_5\_2017\_2\_49\_PM.xls** from 10.24.3.131?

Open

Save

Cancel



# Pending Referrals

**Search Filter**  
Enter the required search criteria below.

Start Date  End Date

Pending Referrals - By Referral Date

Drag a column header here to group by that column

Select	Med Rec #	Newborn Id	Infant Last N	Infant First N	Name at Disch	DOB	Gender	Birth Order	Mother Last Na	Mother First Name	Submitter Hosp	Referral Date	Referral Type	Status Due D	CHN
Select		PA150081036	PEACHY	KATE		03/14/20	Female	Not Multiple Bir	PEACHY	NANCY	Gentle Delivery	03/27/2019	SCID - Immunolo	03/31/2019	Angela Collins
Select	5952553	PA160124475	MAGANA B			03/04/20	Male	Second Multiple	MAGANA	CYNDEY	Geisinger-Wyom	03/27/2019	SCID - Immunolo	03/31/2019	Janine Strick

- Click “Select” to complete or cancel a referral



# Pending Referrals

<b>Newborn ID:</b> 34343453453	<b>Infant Name:</b> DLNAME, DFNAME	<b>Gender:</b> Female
<b>Case Status:</b> Closed	<b>Mother's Name:</b> TEST,	<b>Date of Birth:</b> 01/01/2019 @ 00:00
<b>Birth Order:</b> Not Multiple Birth	<b>Mother DOB:</b>	<b>Birth Weight:</b> 0 grams
<b>Filter Paper #:</b> 34343453453	<b>Submitter Name:</b> Magee Womens Hospital of UPMC	<b>Results Released:</b> 01/22/2019
<b>Hyperal:</b>	<b>Birth Facility:</b> Magee Womens Hospital of UPMC	<b>PCP:</b>
<b>Transfused Date:</b>	<b>MRN #:</b>	<b>PCP Phone:</b>
<b>Gestation Age:</b>	<b>Collection Date:</b> 01/02/2019 @ 00:00	<b>Hearing Date:</b>
<b>Pulse Ox Date:</b>	<b>Pulse Ox Result:</b> Unknown	<b>Reason:</b>

Edit Referral

\* Referral Type
SCID - Immunology/Infectious

\* Disorder

\* Referred To
TC02IMMUNO

Alfred I. duPont Hospital for Children - IMMUNOTC  
1600 Rockland Road,  
Wilmington, DE 19803

\* Referral Date
4/17/2019

\* Person Completing Referral
scid

\* Date Referral Completed
4/17/2019

\* Time Referral Completed
15:58

\* Referral Received
☐

OR

\* Referral Cancelled
☐

\* Referral Cancelled Reason

Edit Save Cancel

[Return to Referrals Grid](#)

- The referral opens in edit mode
- Red asterisks (\*) indicate mandatory fields
- Blue asterisks (\*) indicate conditionally mandatory fields

## Pending Referrals

Home	Contact Us	Search	Logoff	Screen 1 of 1	< Prev	1	Next >
<div> <div> Case Information  Demographics (C)  Appointments  Referrals  Note Book  Document Capture  Dried Blood Spot  Laboratory Results </div> <div> Newborn ID: 34343453453  Case Status: Closed  Birth Order: Not Multiple Birth  Filter Paper #: 34343453453  Hyperal:  Transfused Date:  Gestation Age:  Pulse Ox Date: </div> <div> Infant Name: DLNAME, DFNAME  Mother's Name: TEST,  Mother DOB:  Submitter Name: Magee Womens Hospital of UPMC  Birth Facility: Magee Womens Hospital of UPMC  MRN #:  Collection Date: 01/02/2019 @ 00:00  Pulse Ox Result: Unknown </div> <div> Gender: Female  Date of Birth: 01/01/2019 @ 00:00  Birth Weight: 0 grams  Results Released: 01/22/2019  PCP:  PCP Phone:  Hearing Date:  Reason: </div> </div>							
							Cancel Retry

The header of a case has several components:

- The center, blue banner identifies the infant
- The left-side navigation menu includes links for other case details
- The top-right corner allows for system navigation
  - **Cancel** - Return to the previous screen
  - **Retry** - Return to the grid from where you selected the case
  - **Prev** and **Next** - Allow you to view additional filter papers for the case

# Pending Referrals

**Edit Referral**

\* Referral Type: SCID - Immunology/Infectious

\* Disorder: [Empty]

\* Referred To: TC02IMMUNO  
Alfred I. duPont Hospital for Children - IMMUNOTC  
1600 Rockland Road,  
Wilmington, DE 19803

\* Referral Date: 4/17/2019

\* Person Completing Referral: scid user

\* Date Referral Completed: 4/17/2019

\* Time Referral Completed: 15:58

\* Referral Received: ☐

OR

\* Referral Cancelled: ☐

\* Referral Cancelled Reason: [Empty]

Buttons: Edit, Save, Cancel

Referral Cancelled Reason dropdown options:  
Baby not seen  
Family transferred  
Expired  
Parent refusal  
Normal Rescreen

[Return to Referrals Grid](#)

- \* Mandatory data for Save
- \* Conditionally mandatory
- Option drop-down
- Calendar drop-down

Auto-filled

Select Referral Received OR  
Referral Cancelled and Reason  
Cancelled

- Click “Save” to update the referral
- Click “Cancel” to exit the record without updates

# Pending Referrals

Referral Received OR Referral Cancelled: This field is required

Edit Referral

\* Referral Type SCID - Immunology/Infectious

\* Disorder

\* Referred To TC02IMMUNO

Alfred I. duPont Hospital for Children - IMMUNOTC  
1600 Rockland Road,  
Wilmington, DE 19803

\* Referral Date 5/6/2019

\* Person Completing Referral Doni test

\* Date Referral Completed 5/6/2019

\* Time Referral Completed 00:00

\* Referral Received ☐

OR

\* Referral Cancelled ☐

\* Referral Cancelled Reason

Save

- If mandatory data is missing or incorrect, error message(s) will display at the top of the screen when you click “Save”
- Fill in the required details correctly and click “Save” again

# Accepting A Referral

Edit Referral

\* Referral Type
SCID - Immunology/Infectious

\* Disorder

\* Referred To
TC08IMMUNO

The Milton S. Hershey Medical Center Penn State Medical Center - IMMUNOTC  
500 University Drive,  
Hershey, PA 17033

\* Referral Date
5/8/2019

\* Person Completing Referral
Daniel LaGonterle

\* Date Referral Completed
5/13/2019

\* Time Referral Completed
17:29

\* Referral Received
☒

OR

\* Referral Cancelled
☐

\* Referral Cancelled Reason

Edit
Save
Cancel

- Check the “Referral Received” box
- Click “Save”
- A Dx record will be created and listed on the Final Diagnosis Needed Grid

# Cancelling A Referral

**Edit Referral**

\* Referral Type: SCID - Immunology/Infectious

\* Disorder: [Dropdown]

\* Referred To: TC02IMMUNO  
 Alfred I. duPont Hospital for Children - IMMUNOTC  
 1600 Rockland Road,  
 Wilmington, DE 19803

\* Referral Date: 4/17/2019

\* Person Completing Referral: scid user

\* Date Referral Completed: 4/17/2019

\* Time Referral Completed: 15:58

\* Referral Received: ☐

OR

\* Referral Cancelled: ☒

\* Referral Cancelled Reason: Baby not seen

[Edit] [Save] [Cancel]

Baby not seen  
 Family transferred  
 Expired  
 Parent refusal  
 Normal Rescreen

- To cancel a referral check the Referral Cancelled check box
- Select a Referral Cancelled Reason from the dropdown
  - Baby Not Seen
  - Family Transferred
  - Expired
  - Parent Refusal
  - Normal Rescreen
- Click “Save” to update
- The state will receive an action indicating referral cancelled – no further steps needed for the user
- The DX will not be created or if one already exists , it will no longer appear on the Final Diagnosis Needed grid

# Completed Referrals

Referrals								
Select	Referral Date	Referral Type	Referred To	Phone #	Completed By	Completed On	Status	
Select	05/06/2019	SCID - Immunology/Infectious Disease	Alfred I. duPont Hospital for Children - IMMUNOTC	(302) 651-4000	Doni test	05/06/2019	Pending	
Select	04/17/2019	CAH - Endocrinology CAH	Albert Einstein Medical Center - ENDOTC	(215) 456-8706	Daniel LaGonterie	05/16/2019	Cancelled	
Select	04/17/2019	CH - Endocrinology CH	Albert Einstein Medical Center - ENDOTC	(215) 456-8706	Daniel LaGonterie	04/17/2019	Completed	
Select	04/17/2019	SCID - Immunology/Infectious Disease	Alfred I. duPont Hospital for Children - IMMUNOTC	(302) 651-4000	scid	04/17/2019	Completed	
Select	02/27/2019	SMA - Spinal Muscular Atrophy	Clinic for Special Children- SMATC	(717) 547-3350	Kelly Holland	02/27/2019	Completed	
Select	02/26/2019	SCID - Immunology/Infectious Disease	The Milton S. Hershey Medical Center Penn State Medical Center - IMMUNOTC	(717) 531-8521	Daniel LaGonterie	04/17/2019	Completed	

- Once saved, the screen is redirected back to the Referrals summary page
- The referral status will be updated to “Completed”
- The referral will be removed from the “Pending Referrals” grid and added to the “Final Diagnosis Needed” grid
- To view and edit a referral, click “Select” next to it
- Pending or Cancelled are the other referral status types

# Final Diagnosis Needed



**Case Management**



**User Administration**



**Pending Referrals**



**Final Diagnosis Needed**



**Completed Evaluations**

- Link to completed referrals for which a final diagnosis has not been entered yet



# Final Diagnosis Needed

**Search Filter**  
Enter the required search criteria below.

Start Date: 4/16/2018 End Date: 4/17/2019

Filter Results

Final Diagnosis Needed – By Referral Date

Export to Excel Items Overdue

Drag a column header here to group by that column

Select	Med Rec #	Newborn Id	Infant Last Name	Infant First N	Name at Discharge	DOB	Gender	Birth Order	Birth Hospital	Mother Last	Mother First	DBS Submitter	Referral Com	Referral Type	CHN
Select	444236	506	ACE	B BOY		05/14/2005	Female		Moses Taylor Hospital			Moses Taylor Hospital	12/10/2018	SCID - Immunology	Abby Bond
Select	00003006858	PA1	KROI		DFN	10/10/2018	Female	Not Multiple	Paoli Memorial Hospital			Paoli Memorial Hospital	2/26/2019	SCID - Immunology	TC USER SCID
Select	45464646546	DA1	TES1	SMS	DFN	01/02/2019	Female	Not Multiple	Albert Einstein Medical Center			EF Albert Einstein Medical Center	3/7/2019	SCID - Immunology	QA Test
Select		PA1	PRIC		CAR	11/02/2018	Male	Not Multiple	Geisinger Holy Spirit Hospital			Geisinger Holy Spirit Hospital	3/12/2019	SCID - Immunology	Janine Strick
Select	10631827	PA1	DAV			06/04/2018	Male	Not Multiple	Lehigh Valley Health Network			Lehigh Valley Health Network	4/1/2019	SCID - Immunology	Karen Friese
Select	10141359	PA1	DOR		COS	09/05/2018	Female	First Multipl	Holy Redeemer Hosp. & Medical Ctr.			Holy Redeemer Hosp. & Medical Ctr.	4/15/2019	SCID - Immunology	Janine Strick
Select		343	TES1		DFN	01/01/2019	Female	Not Multiple	Magee Womens Hospital of UPMC			Magee Womens Hospital of UPMC	4/17/2019	SCID - Immunology	Kate Withjack

- Lists all completed referrals that are awaiting a final diagnosis
- Defaults to cases requiring a final diagnosis within the past 366 days
- Use the filter options on the top to change the default settings
- Click “Select” to view and edit a record

## Final Diagnosis Needed

- Final Diagnosis is expected to be updated within the requirements below:

Disorder	DX Due in
CAH	By day 30 after referral
CH	By day 30 after referral
SCID	By day 30 after referral

- The diagnosis forms will match the workbook previously emailed to you by the CHN

# Final Diagnosis Needed

**Edit SCID Diagnostic Results**

\* Diagnosis Date  
 ▼

\* Diagnosis  
 ▼

If other, please specify

**Confirmatory Testing**

Confirmatory Testing Date  
 ▼

Treatment Start Date  
 ▼

\* Was the CD3 T cell level tested?  
 ▼

\* What was the CD3 T cell level?  
 ▼

\* Was proliferation to PHA test done?  
 ▼

\* Proliferation to PHA:  
 ▼

\* Was Maternal engraftment documented?  
 ▼

\* Was a mutation analysis performed in the genes known to be associated with SCID?  
 ▼

- Diagnostic Results form opens in edit mode
- There is a separate form for each disorder type, and it matches the current workbook format
- Mandatory field indicators (\* and \*) and drop-downs function the same way as they do on the “Edit Referral” form

# Final Diagnosis Needed

**\* Were variants detected in the genes known to be associated with SCID?**

▼

**\* Allele 1:**

▼


**\* Allele 2:**

▼

**\* Was 22q11 deletion ruled out?**

▼

Created Date  
04/17/2019  
Created By  
scid

Final Diagnosis ☐ 

Edit

Save

Cancel

- If it is the final diagnosis, check the box
- Click “Save” to update the Dx result
- Click “Cancel” to exit without saving changes
- If unable to save, scroll to the top of the screen for warnings and errors
- If you have any additional comments, add it to the Notebook

[Return to SCID Diagnostic Results Grid](#)

**Note:** To cancel a diagnostic result, go to the “Edit Referral” screen and cancel it.

## Final Diagnosis Needed

<b>Newborn ID:</b> 34343453453	<b>Infant Name:</b> DLNAME, DFNAME	<b>Gender:</b> Female
<b>Case Status:</b> Closed	<b>Mother's Name:</b> TEST,	<b>Date of Birth:</b> 01/01/2019 @ 00:00
<b>Birth Order:</b> Not Multiple Birth	<b>Mother DOB:</b>	<b>Birth Weight:</b> 0 grams
<b>Filter Paper #:</b> 34343453453	<b>Submitter Name:</b> Magee Womens Hospital of UPMC	<b>Results Released:</b> 01/22/2019
<b>Hyperal:</b>	<b>Birth Facility:</b> Magee Womens Hospital of UPMC	<b>PCP:</b>
<b>Transfused Date:</b>	<b>MRN #:</b>	<b>PCP Phone:</b>
<b>Gestation Age:</b>	<b>Collection Date:</b> 01/02/2019 @ 00:00	<b>Hearing Date:</b>
<b>Pulse Ox Date:</b>	<b>Pulse Ox Result:</b> Unknown	<b>Reason:</b>

SCID Diagnostic Results							
	Evaluation Status	Diagnosis Date	Referral Date	Diagnostic Provider	SCID Results	Created Date	Created By
Select	Completed	04/17/2019	04/17/2019	Alfred I. duPont Hospital for Children - IMMUNOTC	Classic Severe Combined Immunodeficiency	04/17/2019	scid

- If “Final Diagnosis” was checked, the “Evaluation Status” will be updated to “Completed”, else it will stay as “In Progress”
- The record will be removed from the “Final Diagnosis Needed” grid and added to the “Completed Evaluations” grid
- To view and edit a record, click “Select” next to it

# Completed Evaluations

Home Release Notes Contact Us Logout



Case Management



User Administration



Pending Referrals



Final Diagnosis Needed



Completed Evaluations

- Link to all completed cases

# Completed Evaluations

**Search Filter**  
Enter the required search criteria below.

Start Date  End Date

Completed Evaluations – By Diagnosis Date

Drag a column header here to group by that column

Select	Med Rec #	Newborn ID	Infant Last Name	Infant First Name	Name at Discharge	DOB	GENDER	Birth Order	Birth Hospital	Mother Last Name	Mother First Name	Referral Completion	Referral Type	DX Date	CHN
<a href="#">Select</a>	386	PA1				12/15/2018	Male	Not Multiple Bir	Evangelical Community Hospit			4/17/2019	Immunology/Infecti	4/17/2019	TC USER SCID
<a href="#">Select</a>		343				1/1/2019	Female	Not Multiple Bir	Magee Womens Hospital of UF			4/17/2019	Immunology/Infecti	4/17/2019	Kate Withjack
<a href="#">Select</a>	263	PA1				11/14/2017	Female	First Multiple	Hershey Medical Center			4/3/2019	Immunology/Infecti	4/3/2019	TC USER HGB
<a href="#">Select</a>	MD	PA1				8/1/2018	Male	Not Multiple Bir	St. Marys Medical Ctr. - Langh			4/2/2019	Immunology/Infecti	4/2/2019	Janine Strick
<a href="#">Select</a>	263	PA1				10/22/2018	Female	Not Multiple Bir	Waynesboro Hospital			4/2/2019	Immunology/Infecti	4/2/2019	TC USER SCID
<a href="#">Select</a>	383	PA1				10/25/2018	Male	Not Multiple Bir	Evangelical Community Hospit			4/2/2019	Immunology/Infecti	4/2/2019	TC USER SCID

- Allows quick review of completed cases
- Lists only the records that have the “Final Diagnosis” checkbox marked
- By default displays records with a final diagnosis date in the past 30 days
- To view a record, click “Select” next to it

# Case Management



**Case Management**



**User Administration**



**Pending Referrals**



**Final Diagnosis Needed**



**Completed Evaluations**

- Allows users to search for specific cases based on selected criteria



## Case Management

Newborn ID	<input type="text"/>	Mother's First Name	<input type="text"/>
Filter Paper #	<input type="text"/>	Mother's Last Name	<input type="text"/>
Medical Record #	<input type="text"/>	Mother's DOB	<input type="text" value="v"/>
Infant Last Name	<input type="text"/>	Mother's Phone #	<input type="text"/>
From Date of Birth	<input type="text" value="v"/>	Birth Facility	<input type="text" value="..."/>
To Date of Birth	<input type="text" value="v"/>	Submitter's Name	<input type="text" value="..."/>
Gender	<input type="text" value="v"/>	Case Status	<input type="text" value="v"/>
Birth Certificate #	<input type="text"/>		

- To find a record, enter a value in one or more of the fields and click “Search”
  - A combination of fields can be used, e.g. Infant Last Name and DOB
  - Wildcard cards can also be used, e.g. Infant Last Name as “SM\*”
- Click “Reset” to clear the search
- If the search returns more than 10,000 records, a warning message will be displayed

# Case Management

Newborn ID  
Filter Paper #  
Medical Record #  
Infant Last Name  
From Date of Birth  
To Date of Birth  
Gender  
Birth Certificate #

Mother's First Name  
Mother's Last Name  
Mother's DOB  
Mother's Phone #  
Birth Facility  
Submitter's Name  
Case Status

Search
Reset

Filter Paper(s)

Export to Excel

Drag a column header here to group by that column

Select	Newborn ID	Filter Paper #	Med Rec #	Infant Last Name	Last Name at C	DOB	Gender	Mother First Na	Mother Last Na	Mom DOB	Phone	Birth Facility	Submitter Nam	Status
Select	DA123456TE...	DA123456TE...	45464646546	TESTING	DLNAME	1/2/2019	Female	SMA MOTHER	TESTING			Albert Einstein Medical Center	Albert Einstein Medical Center	Open
Select	34343453453	34343453453		TEST	DLNAME	1/1/2019	Female		TEST			Magee Womens Hospital of UPMC	Magee Womens Hospital of UPMC	Open
Select	PA170063618	PA170063618	971132225	WELSH	DLNAME	4/1/2019	Female	STEPHANIE	WELSH	1/24/1994		Magee Womens Hospital of UPMC	Magee Womens Hospital of UPMC	Open

- Click “Select” to view a record from the search results
- If the baby is not found, try alternate criteria

# Case Management

Birth Facility

Submitter's Name

Export to Excel

Select	ID#	Type	Description	Last Name	First Name	Cases	Address	Address 2	City	Zip Code
<input type="text"/>	<input type="text"/>	Hosp/IP Prov	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Select</b>	H178	Hosp/IP Prov	Geisinger Bloomsburg Hospital	Geisinger Bloomsburg Hospital		5540	549 E Fair Street		Bloomsburg	17815

☒ [Type] Equals 'Hosp/IP Prov'

Cancel

- To search by Birth Facility or Submitter, click the ellipsis
- Click “Select” from the list displayed of your affiliated sites

# Case Management

Home	Contact Us	Search	Logoff	Screen 1 of 1	< Prev	1	Next >
<div> <div> Case Information <ul style="list-style-type: none"> <li>Demographics (C)</li> <li>Appointments</li> <li>Referrals</li> <li>Note Book</li> <li>Document Capture</li> <li>Dried Blood Spot <ul style="list-style-type: none"> <li>Laboratory Results</li> <li>Lab Demographics</li> <li>SCID Diagnostic Results</li> </ul> </li> <li>Point of Care - Hearing <ul style="list-style-type: none"> <li>IP/OP Screening Results</li> </ul> </li> <li>Point of Care - CHD <ul style="list-style-type: none"> <li>CHD Screening Results</li> </ul> </li> </ul> </div> <div> <p><b>Newborn ID:</b> 34343453453      <b>Infant Name:</b> DLNAME, DFNAME      <b>Gender:</b> Female</p> <p><b>Case Status:</b> Open      <b>Mother's Name:</b> TEST,      <b>Date of Birth:</b> 01/01/2019 @ 00:00</p> <p><b>Birth Order:</b> Not Multiple Birth      <b>Mother DOB:</b>      <b>Birth Weight:</b> 0 grams</p> <p><b>Filter Paper #:</b> 34343453453      <b>Submitter Name:</b> Magee Womens Hospital of UPMC      <b>Results Released:</b> 01/22/2019</p> <p><b>Hyperal:</b>      <b>Birth Facility:</b> Magee Womens Hospital of UPMC      <b>PCP:</b></p> <p><b>Transfused Date:</b>      <b>MRN #:</b>      <b>PCP Phone:</b></p> <p><b>Gestation Age:</b>      <b>Collection Date:</b> 01/02/2019 @ 00:00      <b>Hearing Date:</b></p> <p><b>Pulse Ox Date:</b>      <b>Pulse Ox Result:</b> Unknown      <b>Reason:</b></p> </div> <div> Cancel Retry </div> </div>							

The header of a case has several components:

- The center, blue banner identifies the infant
- The left-side navigation menu includes links for other case details
- The top-right corner allows for system navigation
  - **Cancel** - Return to the previous screen
  - **Retry** - Return to the grid from where you selected the case
  - **Prev** and **Next** - Allow you to view additional filter papers for the case

## Case Menu

Case Information	⬆
◦ Demographics (C)	
◦ Appointments	
◦ Referrals	
◦ Note Book	
◦ Document Capture	
Dried Blood Spot	⬆
◦ Laboratory Results	
◦ Lab Demographics	
◦ Metabolic Diagnostic Results	
◦ Hemoglobin Diagnostic Results	
◦ Cystic Fibrosis Diagnostic Results	
◦ CH Diagnostic Results	
◦ CAH Diagnostic Results	
◦ SCID Diagnostic Results	
Point of Care - Hearing	⬆
◦ IP/OP Screening Results	
Point of Care - CHD	⬆
◦ CHD Screening Results	

- **Demographics** – current demographic data for the case
- **Appointments** – all appointments for the case
- **Referrals** – all referrals for the case
- **Notebook** – all notes for the case
- **Document Capture** – lab reports and other case documents; .doc, .docx, .xls, .xlsx, .pdf, .jpg, .gif and .png files
- **Laboratory Results** – filter paper results
- **Lab Demographics** – demographics from the filter paper
- **Diagnostic Results** – only the diagnostic results your affiliated disorders for the case will display
- **IP/OP Screening Results** – all hearing screening results
- **CHD Screening Results** – all CHD screening results

# Case Demographics

**Patient Information**

\* Newborn ID 9434945453

DBS CHN Kate Withjack

POC-Hearing CHN Kate Withjack

POC-CHD CHN Kate Withjack

Infant Last Name TEST

Infant First Name BG

Infant Last Name at Discharge

Infant First Name at Discharge

Gender Female

☒ White

☐ Black

☐ Asian

☐ Native Indian/Alaskan

☐ Other

☐ Hawaii/Pacific Island

☐ Not Indicated

☐ Hispanic Origin

☐ Multiple Races

Newborn Hispanic No

Birth Order Not Multiple Birth

\* Date of Birth 1/1/2019

Birth Time 0000

Birth Weight 0

Medical Record Number

Medical Assistance

Transfused

Transfused Date

Antibiotics

AKA Last Name

AKA First Name

Hyperal

Carnitine Supplement

NICU

Guardian's First Name

Guardian's Last Name

**Mother's Information**

Mother Last Name TEST

Mother First Name MOM

Mother Initial

Street Address 1 MAIN STREET

Zip Code 15213

City Pittsburgh

State PA

Mother's County ALLEGHENY

Home Phone ( ) -

Cell Phone ( ) -

Work Phone ( ) -

Work Extension

Mother DOB

Email Address

**Emergency Contact**

Emergency Contact

Emergency Contact # ( ) -

Emergency Contact Info

**Birth Hospital Information**

Birth Hospital ID 111

Magee Womens Hospital of UPMC  
300 Halket Street, Room 4662 LCIC  
Pittsburgh PA - 15213

- Displays the most recent demographic information in view-only mode
- If you have more recent demographic information, please email it to the CHN assigned to this case

# Appointments

Appointments

Appointment Type

Appointment Date

Appointment Time

Provider

Reason Not Seen

Entered By

Date Created

Modified By

Date Updated

No data to display

Add New Appointment

- If a future follow-up appointment is required, it should be entered when it is confirmed with the family
- To add or view, click the Appointments tab from the left-navigation menu
- To add a new appointment, click “Add New Appointment”

# Appointments

**Update Appointment**

Entered By scid  
Date Created Apr 18 2019 10:53AM  
Sequence 4

\* Appointment Type DBS Other  
\* Appointment Date 5/1/2019  
Appointment Time 17:00  
Provider ID TC02IMMUNO

Alfred I. duPont Hospital for Children - IMMUNOTC  
1600 Rockland Road  
Wilmington DE 19803

Provider Name  
Provider Phone ( ) -  
Reason Not Seen  
Comments

[Edit](#) [Save](#) [Cancel](#)

[Return to Appointments Grid](#)

Appointment Type	Appointment Date	Appointment Time	Provider	Reason Not Seen	Entered By	Date Created	Modified By	Date Updated
DBS Other	05/01/2019	17:00	Alfred I. duPont Hospital for Children - IMMUNOTC		scid	04/18/2019 10:53:13	scid	04/18/2019 10:53:13

[Add New Appointment](#)

- Select the appointment type “DBS Other”, then enter the appointment date and other data as needed
- The provider defaults to your facility
- Click “Save” to update and the appointment will be added to the grid



# Notebook

Notebook Entries

	Date Created	Last Modified	Entered By	Follow Up Type
No data to display				

Add Note

- The notebook is where you can add any comments related to the case
- To add or view, click the Note Book tab from the menu
- To add a new note, click “Add Note”

# Notebook

- Select the note type “DBS”, then enter the note
- Click “Spell Check” if needed
- Click “Save” to update and the note will be added to grid

Notes

\* Follow up type: DBS

This is a note from the case

Spell Check

Save Cancel Delete

Return to Notes Grid

Notebook Entries				
	Date Created	Last Modified	Entered By	Follow Up Type
Select	5/6/2019 5:59:05 PM	5/6/2019 6:00:07 PM	TC Admin SCID Test Staging	DBS
This is a note from the case				
Add Note				

# Document Capture - Add

**Document Capture**

Drag a column header here to group by that column

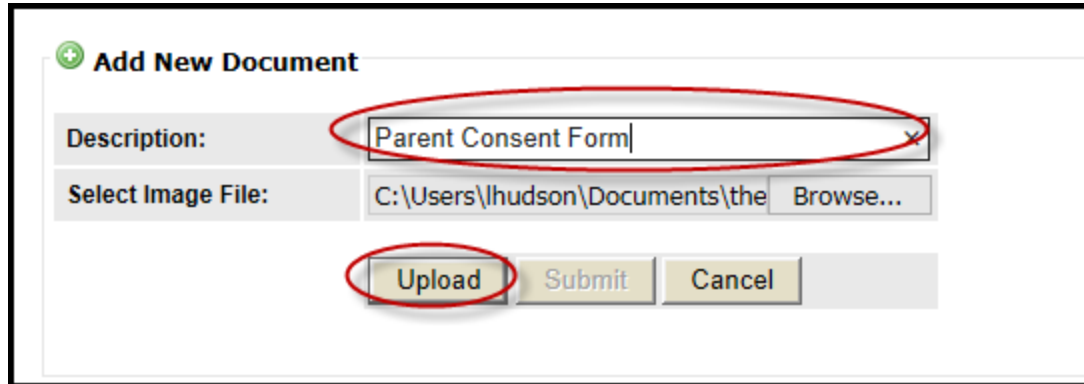
View Document	Comment	▼	Saved by	▼	Date Saved	▼	Select
	<input type="text"/>		<input type="text"/>		<input type="text"/>		

No data to display

Add New File Delete Selected

- Click “Add New File” to add a scanned document to the case
- Click “Browse” to open search window to locate your document
- Click “Open” from the search window when the file is selected

## Document Capture - Add



**+ Add New Document**

Description: Parent Consent Form

Select Image File: C:\Users\Ihudson\Documents\the Browse...

Upload Submit Cancel

- Enter the document description then Click “Upload”
- File types supported: .doc, .docx, .xls, .xlsx, .pdf, .jpg, .gif and .png

## Document Capture - Add

**Add New Document**

Description:

Select Image File:

File has been uploaded successfully. Please click the 'Submit' button to store the file in the database so you can view it later.


Image preview is not available for this type of document!


- If system accepts the image type and description, you will be prompted to “Submit”


## Document Capture - View

### Document Capture

Drag a column header here to group by that column

View Document	Comment	Saved by	Date Saved	Select
	Parents Consent Form	TCA_CAH	08/05/2017	<input type="checkbox"/>

 Add New File

 Delete Selected

- To view an existing document, click 

# Laboratory Results

Select	Group	Disorder	Mnemonic	Comment	Status
Select	T4 and TSH	T4 (CH)	WNL	Within Normal Limits	Normal
Select	AA	AA	WNL	Within Normal Limits	Normal
Select	AA	MSUD	WNL	Within Normal Limits	Normal
Select	AA	PKU	WNL	Within Normal Limits	Normal
Select	Gal	GAL	WNL	Within Normal Limits	Normal
Select	Gal	GALBEU	WNL	Within Normal Limits	Normal
Select	CAH	CAH	WNL	Within Normal Limits	Normal
Select	Hgb	HGB	FA	Within Normal Limits	Normal
Select	BIO	BIO	WNL	Within Normal Limits	Normal
Select	CF	CF	WNL	Within Normal Limits	Normal
Select	SCID	SCID	WNL	Within Normal Limits	Normal
Select	AC	AC	WNL	Within Normal Limits	Normal

Select	Testcode	Testnam	Value
Select	00053	T4 CH	16.10

- “Select” the test to view the result values

# Lab Demographics

Lab Demographics Screen	
Child's Information	Submitter / Physician
<b>Newborn ID</b> 34343453453 <b>Filter Paper #</b> 34343453453 <b>Name</b> TEST, <b>Name at Discharge</b> DLNAME, DFNAME <b>Collection Date / Time</b> 01/02/2019 @ 0000 <b>Med Rec Number</b> <b>Birth Date / Time</b> 01/01/2019 @ 0000 <b>Sex</b> Female <b>Race</b> Unknown <b>Hispanic</b> <b>Birth Order</b> Not Multiple Birth <b>Birth Weight</b> 0 grams <b>Current Weight</b> <b>Tranfused</b> <b>Trans Date/Time</b> <b>Specimen Age</b> 360 <b>Specimen Type</b> Initial Specimen <b>Age of Collection</b> 24 <b>Date Spec Received</b> 01/17/2019 <b>NICU</b> <b>Hyperal</b> <b>Carnitine</b> <b>Meconium Ileus</b> <b>Antibiotics</b> <b>Weeks Gestation</b>	<b>Submitter</b> Magee Womens Hospital of UPMC <b>Address</b> 300 Halket Street Pittsburgh PA 15213 <b>Room</b> 4662 LCIC  <b>Phone</b> (412) 641-1734 <b>Fax</b> (412) 641-4508  <b>Physician Name</b> <b>Address</b> LA137-2, None <b>City</b> LN <b>State</b> <b>Zip Code</b> <b>Phone</b>  <b>Birth Hospital</b> Magee Womens Hospital of UPMC <b>Address</b> 300 Halket Street Pittsburgh PA 15213 <b>Phone</b> (412) 641-1734
Mother's / Guardian's Information	Mother's Medical History
<b>Mother's Name</b> TEST, <b>Mother's DOB</b> <b>Mailing Address</b> <b>City</b> <b>State</b> <b>County</b> <b>Zip Code</b> <b>Email Address</b> <b>Phone</b> <b>Medical Assistance</b>  <b>Emergency Contact</b> <b>Emergency Phone</b> <b>Emergency Contact Info</b>  <b>Guardian's First Name</b> <b>Guardian's Last Name</b>	<b>Thyroid Disease</b> <b>Diabetes</b> No <b>On Steriods</b> <b>Maternal Hepatitis</b> UNK <b>Other</b>

- View only
- Populated from the filter paper



# IP/OP Screening Results

IP Screening Results						
	Screening Type ▼	Screening Order ▼	Result ▼	Screening Provider ▼	Screen Date ▼	Error ▼
<a href="#">Select</a>	Inpatient Hearing	First	L - ABR: Pass, R - ABR: Pass	Magee Womens Hospital of UPMC	01/02/2019	No
OP Screening Results						
	Screening Type ▼	Screening Order ▼	Result ▼	Screening Provider ▼	Screen Date ▼	Error ▼
No data to display						

- In Patient and Out Patient Hearing Screening results are view only
- Click “Select” to view the details

## IP/OP Screening Details


Screen No.	1
Screen Type	Inpatient
* Screening Provider	H1 <span>×</span> <span>...</span> Magee Womens Hospital of UPMC 300 Halket Street, Room 4662 LCIC Pittsburgh PA 15213
Screener	LH
* Date of Screening	1/2/2019
Time of Screening	0000
Date Screening Results Received	4/18/2019

* Result Left Ear	Pass	* Result Right Ear	Pass
* Screening Method Left	ABR	* Screening Method Right	ABR
Malformation Left Ear		Malformation Right Ear	
Family Notified Date		PCP Notified Date	
Data Entry Error	<input type="checkbox"/>		

- The screening details show date, time, method, results and malformations, if any, for the screen

# CHD Screening Results

CHD Screening Results										
	Sequence	Pulse Ox Results	Date Time	Reason	Created By	Date Created	Modified By	Date Modified	Final Result	
	367011	Unknown			HL7 Import User	01/29/2019 13:41:13	HL7 Import User	01/29/2019 14:32:53	Yes	

### Edit CHD Screening Results

\* Pulse Ox

Date

Time

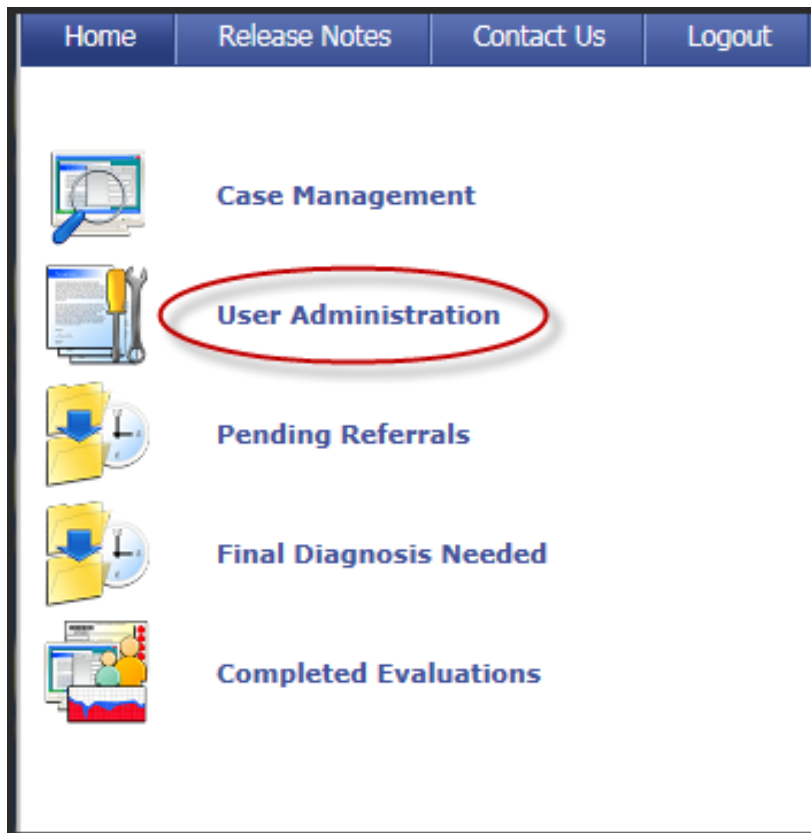
If not performed reason ☐ refused ☐ transferred ☐ <24 hrs. ☐ postnatal echocardiogram performed ☐ prenatal fetal echocardiogram

☐ birth weight < 1500 grams ☐ Other

Final Result ☒

- CHD results are view only
- Click “Select” to view the details

# User Administration



HCP Administrators  
can:

- Create New Users
- Unlock Users
- Reset Passwords

# User Administration

Add New User

Status: Active Inactive Locked

Drag a column header here to group by that column

Select	User ID	User Name	Full Name	Email	Phone	Last Login	Organization	Audits	Reset Password
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Select	745	JSMITH	Joe Smith	LISA.HUDSON@NAT...	( ) -			Audit	Reset Password
Select	746	SGREEN	Sara Green	LISA.HUDSON@NAT...	( ) -			Audit	Reset Password
Select	680	TCU_CAH	TC User CAH Test Staging	DONI.ANTONELLI@N...	( ) -	7/27/2017 3:25:07 AM		Audit	Reset Password

- Lists all users in your affiliated facilities
- Has color coded entries for active, inactive and locked users

# Add Users

Add New User

Status: Active Inactive Locked

Drag a column header here to group by that column

Select	User ID	User Name	Full Name	Email	Phone	Last Login	Organization	Audits	Reset Password
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Select	680	TCU_CAH	TC User CAH Test Staging	DONI.ANTONELLI@N...	( ) -	7/27/2017 3:25:07 AM		Audit	Reset Password

- Click “Add New User”

# Add Users

< Prior

Next >

User ID

Roles

Affiliations

Designee

User Information

\* User Name

JSMITH2

\* Full Name

Joe Smith

x

\* Indicates required field

Save

Cancel

- Enter the user name and full name
- Use the first name initial + last name as the user name
- If the username already exists, add a number at the end, e.g. JSMITH2
- Maximum length is 10
- Click “Next” to Continue

## Add Users



< Prior   Next >

User ID   **Roles**   Affiliations   Designee   User Information

**Roles**   ☒ Treatment Center User - SCID

Save   Cancel

- Select the user's role, which should be limited to:
  - “Treatment Center User” + Disorder
  - Then click “Next”
- Note that HCP Admins can only create HCP users with the same disorder



## Add Users

< Prior **Next >**

User ID Roles **Affiliations** Designee User Information

**Affiliations**

#	ID	Description
No data to display		

Page 1 of 0 (0 items) < Prev Next >

**Providers**

\* Do NOT press Enter while filtering affiliations or your screen will refresh and data will be lost.

#	ID	Description
	TC02IMMUNO	Alfred I. duPont Hospital for Children - IMMUNOTC

**Add**

Save Cancel

- Select the user's affiliations by clicking "Add" then click "Next"
- HCP Admins can only create users with the same affiliations
- If affiliated to multiple sites, "Add" each one to the new user

## Add Users

< Prior   Next >

User ID   Roles   Affiliations   **Designee**   User Information

**Designees**

Drag a column header here to group by that column

#	ID	Description

No data to display

**Providers**

Drag a column header here to group by that column

#	ID	Description

**Add**   TC02IMMUNO   Alfred I. duPont Hospital for Children - IMMUNOTC

Save   Cancel

- If the user should receive the Referral email, add the provider as a Designee then click “Next”
- There is no limit to the number of users per facility, however it is suggested you have 2 to 5 designees

# Add Users

< Prior   Next >

User ID   Roles   Affiliations   Designee   **User Information**

\* Indicates Mandatory Field

Phone ( ) -

Fax ( ) -

\* Email joe.smith@childhosp.org

Title

Organization

Address

City

\* State PA

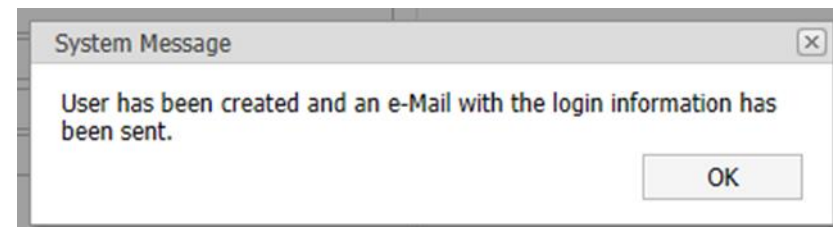
\* Zip Code 19019

Active ☒

**Save**   Cancel

- Enter the mandatory information including the Organization
- Click “Save”

If the configuration for the user account is correct, a confirmation message will display



# Add Users

The items below require attention:

- It is required to select at least one affiliate.

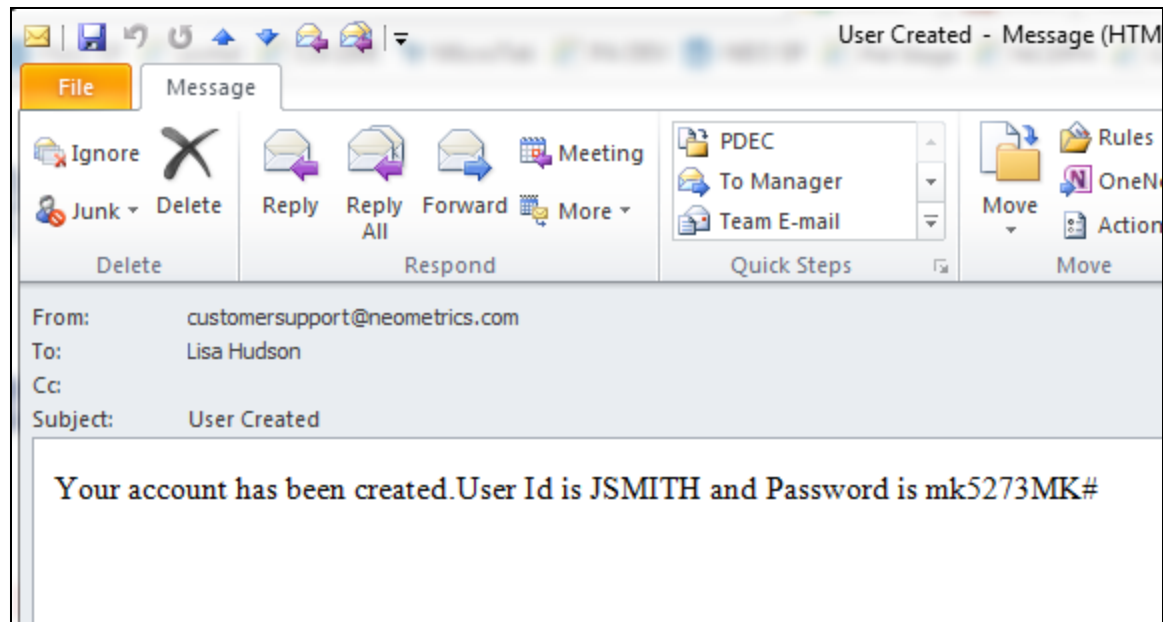
←

User ID	Roles	Affiliations	Designee	User Information
<p>* Indicates Mandatory Field</p> <p>Phone ( ) -</p> <p>Fax ( ) -</p> <p>* Email joe.smith@childhosp.org</p> <p>Title</p> <p>Organization</p> <p>Address</p> <p>City</p> <p>* State PA</p> <p>* Zip Code 19019</p> <p>Active <input checked="" type="checkbox"/></p>				

Save Cancel

- If any required data is missing, a red prompt will display on the top of the “User Information” Tab
- Enter the missing data, and click “Save” again

## Add Users



- An email will automatically be sent to the new user with their user name and initial temporary password
- The users will have 14 days to setup their new password and security question or the HCP Administrator will need to reset the password for them
- Email is sent from [customersupport@neometrics.com](mailto:customersupport@neometrics.com)

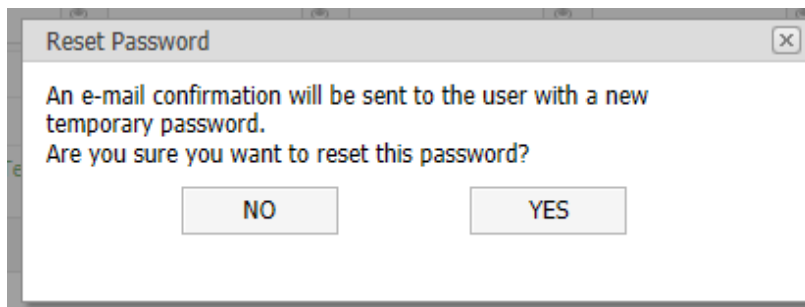
# Reset Password

Add New User

Status: Active Inactive Locked

Drag a column header here to group by that column

Select	User ID	User Name	Full Name	Email	Phone	Last Login	Organization	Audits	Reset Password
Select	1721	da_hspuser	Doni HSP User Test	DONI.ANTONELLI@N...	( ) -	7/10/2017 1:32:56 PM		Audit	Reset Password



- Click “Reset Password” to reset the password for a user
- A prompt will confirm the reset and an email will be sent to the user with their new temporary password

# Unlock User

Add New User

Status: Active Inactive Locked

Drag a column header here to group by that column

Select	User ID	User Name	Full Name	Email	Phone	Last Login	Organization	Audits	Reset Password
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Select	1721	da_hspuser	Doni HSP User Test	DONI.ANTONELLI@N...	( ) -	7/10/2017 1:32:56 PM		Audit	Reset Password
Select	1748	jsmith2	John Smith	LISA.HUDSON@NATU...	( ) -			Audit	Reset Password

- If a user has incorrectly entered their password 5 times or their password has expired, the user is locked out and they must notify their admin user to get “unlocked”
- Click “Select” to view the user details
- Click through the configuration tabs until you get to the “User Information” tab

# Unlock User

< Prior
Next >

User ID
Roles
Affiliations
Designee
**User Information**

\* Indicates Mandatory Field

Phone ( ) -

Fax ( ) -

\* Email DONI.ANTONELLI@NATUS.COM

Title

Organization

Address

City

\* State NY

\* Zip Code 11788

Active ☐

Save
Cancel

- Check the “Active” box
- Click “Save”



# Inactivate User

< Prior Next >

User ID Roles Affiliations **User Information**

\* Indicates Mandatory Field

Phone ( ) -

Fax ( ) -

\* Email LISA.HUDSON@NATUS.COM

Title

Organization

Address

City

\* State PA

\* Zip Code 99999

Active ☒ ←

Save Cancel

- On the User Information tab, uncheck the “Active” box
- Select “Save”

Status: Active Inactive Locked

Drag a column header here to group by that column

Select	User ID	User Name	Full Name	Email	Phone	Last Login	Organization	Audits	Reset Password
Select	745	JSMITH	Joe Smith	LISA.HUDSON@NAT...	( ) -			Audit	Reset Password
Select	746	SGREEN	Sara Green	LISA.HUDSON@NAT...	( ) -			Audit	Reset Password

## Questions



**Lisa Hudson**

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866-639-3439

## CHN List

Abby Bond – [abbond@pa.gov](mailto:abbond@pa.gov)

Angie Collins – [angcollins@pa.gov](mailto:angcollins@pa.gov)

Janyce Hobart – [jahobart@pa.gov](mailto:jahobart@pa.gov)

Karen Frieese – [kfrieese@pa.gov](mailto:kfrieese@pa.gov)

Debra Smeltz – [desmeltz@pa.gov](mailto:desmeltz@pa.gov)

Kate Withjack – [kwithjack@pa.gov](mailto:kwithjack@pa.gov)

Note: All grids identify the CHN assigned to the record

# Webinar Review Questions

## #1

How are you notified that you were assigned a referral?

- a. Phone
- b. Fax
- c. Email

## #2

True or False:

You can share your login with your co-workers ?

# Webinar Review Questions

## #3

How do you reset your password?

- a. Click the “Forgot Password” button on the landing page
- b. Call the state for assistance
- c. Email the password police

## #4

What are the three grids on your landing page called?

- a. Open Referrals, Open Diagnostics, and Closed Cases
- b. Nina, Pinta and Santa Maria
- c. Pending Referrals, Final Diagnosis Needed and Completed Evaluations

## Webinar Review Questions

### #5

What do you do to acknowledge and complete a referral assigned to your facility?

- a. Check “Referral Received” on the referral
- b. Enter a note in the notebook
- c. Call your CHN
- d. All of the above

### #6

What do you do when you are assigned a referral, but the baby does not come to your facility?

- a. Check “Referral Cancelled” and the Reason on the referral
- b. Enter a note in the notebook
- c. Call your CHN
- d. All of the Above

## Webinar Review Questions

### #7

How do you communicate with a CHN about a particular case?

- a. Call your CHN
- b. Enter a note in the notebook
- c. Email your CHN with the baby information and specific details

### #8

Where can you attach a scanned form to the baby's case ?

- a. Appointments
- b. Notebook
- c. Document Capture

## Webinar Review Questions

**#9**

Where can you view the DBS filter paper results?

- a. Laboratory Results
- b. Document Capture
- c. Both a and b

**#10**

Can you find any baby born in the state by searching in Case Management ?

- a. Yes- you have access to every baby
- b. No- you can only access a case if a referral was assigned to you or you performed any testing on the baby
- c. No- you only see babies that you completed evaluations for



# Webinar Review Questions

## #11

True or False:

You can revise a diagnostic form that you have previously entered ?

## #12

Who can add user logins and unlock users for your facility?

- a. Your facility administrator
- b. The state
- c. Both a and b

# HCP Responsibilities

## Next Steps:

- Create Email with the following:
  - Your name, your email and phone #
  - Your facility name and diagnostic follow-up disorder
  - Are you an Administrator ? Are you a Designee?
  - Training Course Attended
  - Provide your answers to the 12 Webinar questions

If you don't have the answers, send email to the address below to request copy of this slide deck
- Send Email with a request for login to the address below:
  - RA-TCNBSAdmin\_Fax@pa.gov

## Going Live!

URL: <https://nbs.pa.gov/toolbar/login.aspx?msg=16>

Make sure to:

- TURN OFF Pop Up Blocker  
Tools -> Pop Up Blocker -> Turn Off Pop Up Blocker
- Turn ON Compatibility View Setting  
Tools -> Compatibility View Settings -> Add
- Add pa.gov to your list of Trusted Sites  
Tools -> Internet Options -> Security -> Sites -> Add
- Supported Web Browser: IE v10 or Higher
- If you receive a HTTP 400 or 440 error – clear your cookies and try again