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

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PA DNSG

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Charu Pahwa, IT Project Manager - c-chapahwa@pa.gov
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

<table>
<thead>
<tr>
<th>Disorder</th>
<th>Max # of Days to Update Referral</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAH</td>
<td>within 4 days of referral</td>
</tr>
<tr>
<td>CH</td>
<td>within 4 days of referral</td>
</tr>
<tr>
<td>SCID</td>
<td>within 4 days of referral</td>
</tr>
</tbody>
</table>

• 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

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
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

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
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

- 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
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:
Pending Referrals

- Click “Select” to complete or cancel a referral
Pending Referrals

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

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

* 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

- 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

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

- 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

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

- 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

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

- 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:

<table>
<thead>
<tr>
<th>Disorder</th>
<th>DX Due in</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAH</td>
<td>By day 30 after referral</td>
</tr>
<tr>
<td>CH</td>
<td>By day 30 after referral</td>
</tr>
<tr>
<td>SCID</td>
<td>By day 30 after referral</td>
</tr>
</tbody>
</table>

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

- 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

- 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

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

- 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

- Link to all completed cases
Completed Evaluations

• 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

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

- 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

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

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

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

• 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

- 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

- 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

- 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.
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
• 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

- Enter the document description then Click “Upload”
- File types supported: .doc, .docx, .xls, .xlsx, .pdf, .jpg, .gif and .png
If system accepts the image type and description, you will be prompted to “Submit”
Document Capture - View

- To view an existing document, click 🕵️‍♂️
### Laboratory Results

<table>
<thead>
<tr>
<th>Select</th>
<th>Group</th>
<th>Disorder</th>
<th>Mnemonic</th>
<th>Comment</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>T4 and TSH</td>
<td>T4 (CH)</td>
<td>WNL</td>
<td>Within Normal Limits</td>
<td>Normal</td>
</tr>
<tr>
<td>Select</td>
<td>AA</td>
<td>AA</td>
<td>WNL</td>
<td>Within Normal Limits</td>
<td>Normal</td>
</tr>
<tr>
<td>Select</td>
<td>AA</td>
<td>MSUD</td>
<td>WNL</td>
<td>Within Normal Limits</td>
<td>Normal</td>
</tr>
<tr>
<td>Select</td>
<td>AA</td>
<td>PKU</td>
<td>WNL</td>
<td>Within Normal Limits</td>
<td>Normal</td>
</tr>
<tr>
<td>Select</td>
<td>Gal</td>
<td>GAL</td>
<td>WNL</td>
<td>Within Normal Limits</td>
<td>Normal</td>
</tr>
<tr>
<td>Select</td>
<td>Gal</td>
<td>GALBEU</td>
<td>WNL</td>
<td>Within Normal Limits</td>
<td>Normal</td>
</tr>
<tr>
<td>Select</td>
<td>CAH</td>
<td>CAH</td>
<td>WNL</td>
<td>Within Normal Limits</td>
<td>Normal</td>
</tr>
<tr>
<td>Select</td>
<td>Hgb</td>
<td>HGB</td>
<td>FA</td>
<td>Within Normal Limits</td>
<td>Normal</td>
</tr>
<tr>
<td>Select</td>
<td>BIO</td>
<td>BIO</td>
<td>WNL</td>
<td>Within Normal Limits</td>
<td>Normal</td>
</tr>
<tr>
<td>Select</td>
<td>CF</td>
<td>CF</td>
<td>WNL</td>
<td>Within Normal Limits</td>
<td>Normal</td>
</tr>
<tr>
<td>Select</td>
<td>SCID</td>
<td>SCID</td>
<td>WNL</td>
<td>Within Normal Limits</td>
<td>Normal</td>
</tr>
<tr>
<td>Select</td>
<td>AC</td>
<td>AC</td>
<td>WNL</td>
<td>Within Normal Limits</td>
<td>Normal</td>
</tr>
</tbody>
</table>

*“Select” the test to view the result values*
Lab Demographics

- View only
- Populated from the filter paper

<table>
<thead>
<tr>
<th>Lab Demographics Screen</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Child’s Information</strong></td>
</tr>
<tr>
<td>Newborn ID: 34343453453</td>
</tr>
<tr>
<td>Filter Paper #: 34343453453</td>
</tr>
<tr>
<td>Name: TEST</td>
</tr>
<tr>
<td>Name at Discharge: DLNAME, DNNAME</td>
</tr>
<tr>
<td>Collection Date/Time: 01/02/2010 @ 0000</td>
</tr>
<tr>
<td>Med Rec Number:</td>
</tr>
<tr>
<td>Birth Date/Time: 01/01/2010 @ 0000</td>
</tr>
<tr>
<td>Race: Unknown</td>
</tr>
<tr>
<td>Hispanic:</td>
</tr>
<tr>
<td>Birth Order: Not Multiple Birth</td>
</tr>
<tr>
<td>Birth Weight: 0 grams</td>
</tr>
<tr>
<td>Current Weight:</td>
</tr>
<tr>
<td>Transfused:</td>
</tr>
<tr>
<td>Trans Date/Time:</td>
</tr>
<tr>
<td>Specimen Age: 360</td>
</tr>
<tr>
<td>Specimen Type: Initial Specimen</td>
</tr>
<tr>
<td>Age of Collection: 24</td>
</tr>
<tr>
<td>Date Spec Received: 01/17/2019</td>
</tr>
<tr>
<td>NICU:</td>
</tr>
<tr>
<td>Hyperal:</td>
</tr>
<tr>
<td>Carnidine:</td>
</tr>
<tr>
<td>Meconium Ileus:</td>
</tr>
<tr>
<td>Antibiotics:</td>
</tr>
<tr>
<td>Weeks Gestation:</td>
</tr>
</tbody>
</table>

| **Mother’s/Guardian’s Information** |
| **Mother’s Medical History** |
| Mother’s Name: TEST, Mother’s DOB: |
| Mailing Address: |
| City: |
| State: |
| County: |
| Zip Code: |
| Email Address: |
| Phone: |
| Medical Assistance: |
| Emergency Contact: |
| Emergency Phone: |
| Emergency Contact Info: |
| Guardian’s First Name: |
| Guardian’s Last Name: |

Submitter: Magee Women’s Hospital of UPMC
Address: 300 Hallak Street Pittsburgh PA 15213
Room 4662 LCIC
Phone: (412) 641-1734
Fax: (412) 641-4508

Physician Name: |
Address: LA137-2, None |
City: LN |
State: |
Zip Code: |
Phone: |

Birth Hospital: Magee Women’s Hospital of UPMC
Address: 300 Hallak Street Pittsburgh PA 15213
Phone: (412) 641-1734

Mother’s Medical History:

<table>
<thead>
<tr>
<th>Condition</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thyroid Disease</td>
<td></td>
</tr>
<tr>
<td>Diabetes</td>
<td>No</td>
</tr>
<tr>
<td>On Steroids</td>
<td></td>
</tr>
<tr>
<td>Maternal Hepatitis</td>
<td>UNK</td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
</tbody>
</table>
IP/OP Screening Results

In Patient and Out Patient Hearing Screening results are view only
Click “Select” to view the details
The screening details show date, time, method, results and malformations, if any, for the screen.
CHD Screening Results

- 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

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

<table>
<thead>
<tr>
<th>Select</th>
<th>User ID</th>
<th>User Name</th>
<th>Full Name</th>
<th>Email</th>
<th>Phone</th>
<th>Last Login</th>
<th>Organization</th>
<th>Audits</th>
<th>Reset Password</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>745</td>
<td>SMITH</td>
<td>Joe Smith</td>
<td>LISA.HUDSON@NATOM...</td>
<td>( )</td>
<td></td>
<td></td>
<td>Audit</td>
<td>Reset Password</td>
</tr>
<tr>
<td>Select</td>
<td>746</td>
<td>SGREEN</td>
<td>Sara Green</td>
<td>LISA.HUDSON@NATOM...</td>
<td>( )</td>
<td></td>
<td></td>
<td>Audit</td>
<td>Reset Password</td>
</tr>
<tr>
<td>Select</td>
<td>600</td>
<td>TCU_CAH</td>
<td>TC User CAH Test Staging</td>
<td>DON.LANTONELLI@N...</td>
<td>( )</td>
<td>7/27/2017 3:25:07 AM</td>
<td></td>
<td>Audit</td>
<td>Reset Password</td>
</tr>
</tbody>
</table>
Add Users

- Click “Add New User”
Add Users

- 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

- 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

- 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

- 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

- 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

- 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
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.
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

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

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

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Slide deck created with assistance from the Pennsylvania Department of Health.
CHN List

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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:
  o Your name, your email and phone #
  o Your facility name and diagnostic follow-up disorder
  o Are you an Administrator? Are you a Designee?
  o Training Course Attended
  o 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:
  o 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