# 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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# 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
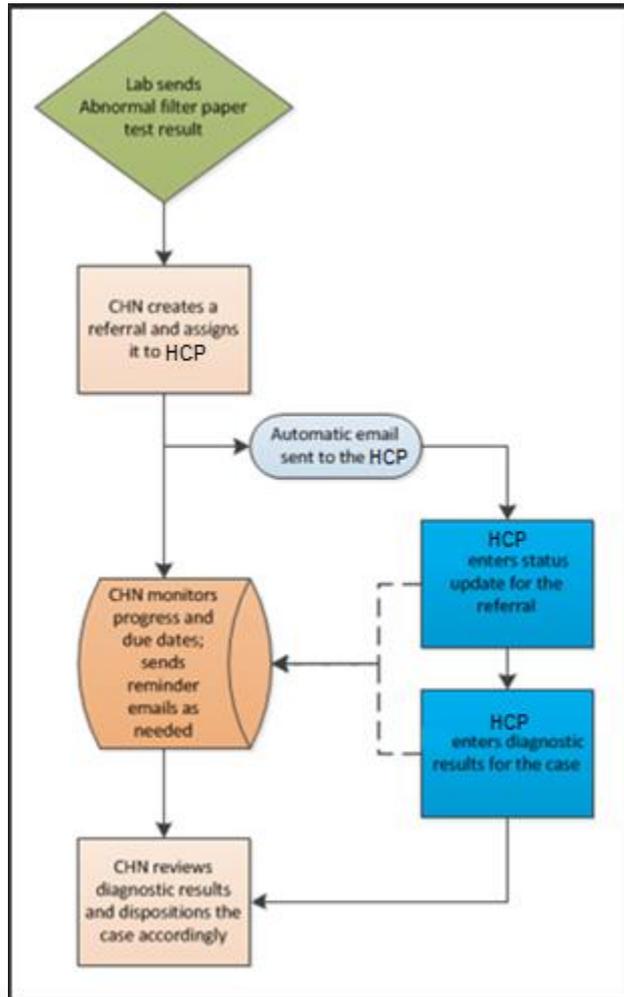


**Current Process**

- 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

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# 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

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# 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

# Pending Referrals



- 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



- 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

**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 user ✕ |
| * Date Referral Completed | 4/17/2019 ⌄ |
| * Time Referral Completed | 15:58 |
| * Referral Received | ☐ |
| **OR** | |
| * Referral Cancelled | ☐ |
| * Referral Cancelled Reason | ⌄ |

Baby not seen
Family transferred
Expired
Parent refusal
Normal Rescreen

Edit    Save    Cancel

**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

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# 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

**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 LaGonterie |
| * 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

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# 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

**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

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# Final Diagnosis Needed

| Home | Release Notes | Contact Us | Logout | |

**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



- 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

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# 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

| | Newborn ID: | 34343453453 | Infant Name: | DLNAME, DFNAME | Gender: | Female |

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

**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

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# 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



- 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

| Home | Release Notes | Contact Us | Logout | |

Case Management

User Administration

Pending Referrals

Final Diagnosis Needed

Completed Evaluations

- 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

**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** – <u>only</u> 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
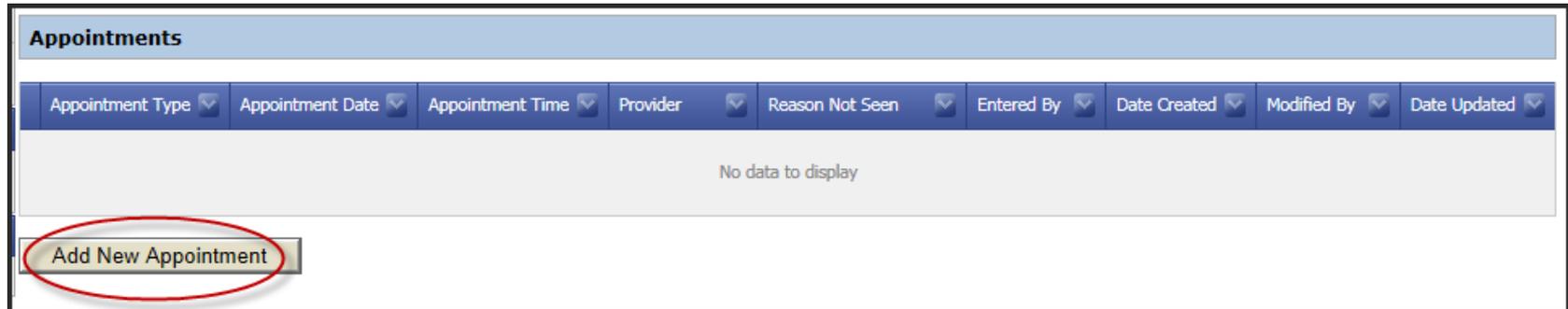


- If a future follow-up appointment is required, it should be entered when it is confirmed with the family
- To add or view, click the Appointments tab from the left-navigation menu
- To add a new appointment, click "Add New Appointment"

# 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
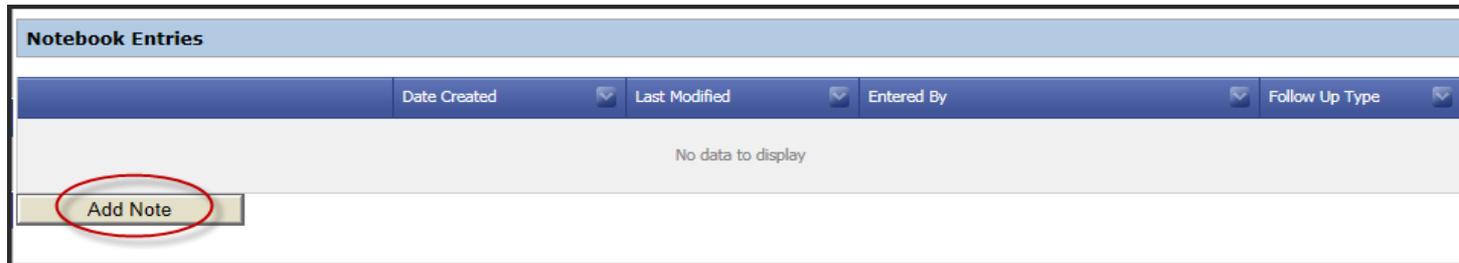
# Notebook



- 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

# Document Capture - Add

**Document Capture**

| View Document | Comment | | Saved by | | Date Saved | | Select |
|---|---|---|---|---|---|---|---|
| | | | | | | | |

Drag a column header here to group by that column

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
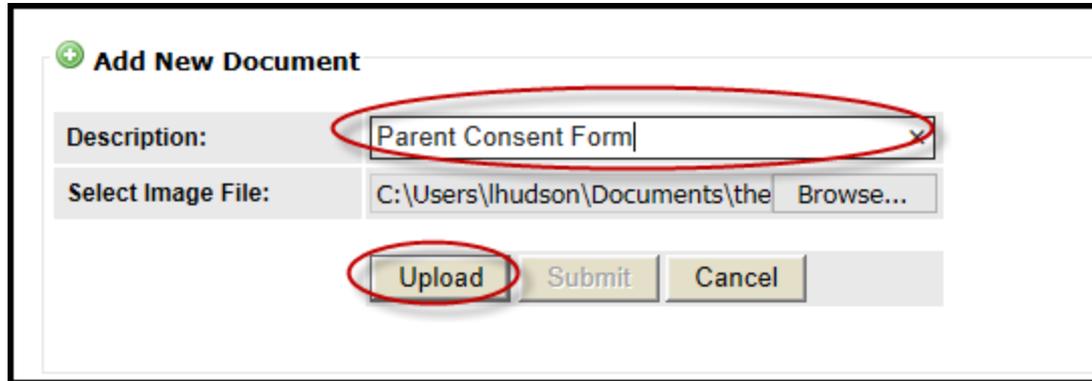


- Enter the document description then Click "Upload"

- File types supported: .doc, .docx, .xls, .xlsx, .pdf, .jpg, .gif and .png

# Document Capture - Add



- 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

| 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 | Testname | Value |
|--------|----------|----------|-------|
| Select | 00053 | T4 CH | 16.10 |

- "Select" the test to view the result values

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# Lab Demographics

**Lab Demographics Screen**

## Child's Information

Newborn ID 34343453453
Filter Paper # 34343453453
Name TEST,
Name at Discharge DLNAME, DFNAME
Collection Date / Time 01/02/2019 @ 0000
Med Rec Number
Birth Date / Time 01/01/2019 @ 0000
Sex Female
Race Unknown
Hispanic
Birth Order Not Multiple Birth
Birth Weight 0 grams
Current Weight
Tranfused
Trans Date/Time
Specimen Age 360
Specimen Type Initial Specimen
Age of Collection 24
Date Spec Received 01/17/2019
NICU
Hyperal
Carnitine
Meconium Ileus
Antibiotics
Weeks Gestation

## Submitter / Physician

Submitter Magee Womens Hospital of UPMC
Address 300 Halket 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 Womens Hospital of UPMC
Address 300 Halket Street Pittsburgh PA 15213
Phone (412) 641-1734

## Mother's / Guardian's Information

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

## Mother's Medical History

Thyroid Disease
Diabetes No
On Steriods
Maternal Hepatitis UNK
Other

- View only
- Populated from the filter paper

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# IP/OP Screening Results

**IP Screening Results**

| | Screening Type | Screening Order | Result | Screening Provider | Screen Date | Error |
|---|---|---|---|---|---|---|
| Select | 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 × ... |
| | 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** | ☐ | | |

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

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# CHD Screening Results



- CHD results are view only
- Click "Select" to view the details

# User Administration
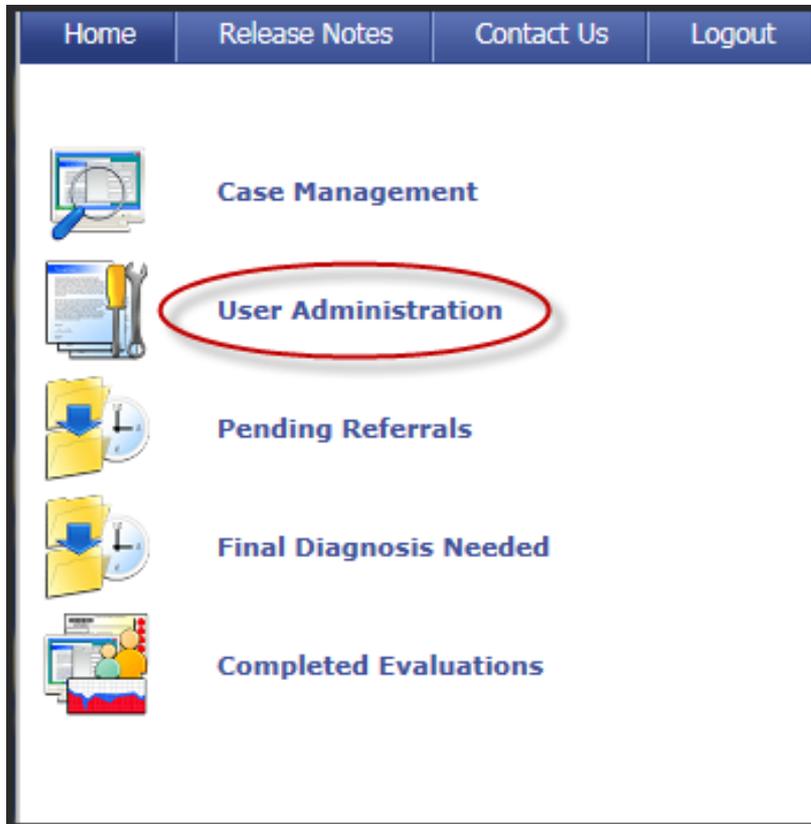


HCP Administrators can:

- 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

# 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
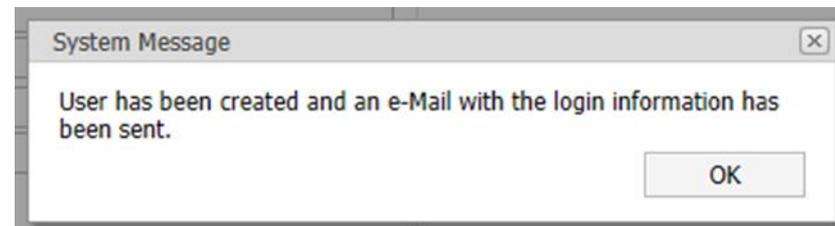
# Add Users



- 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
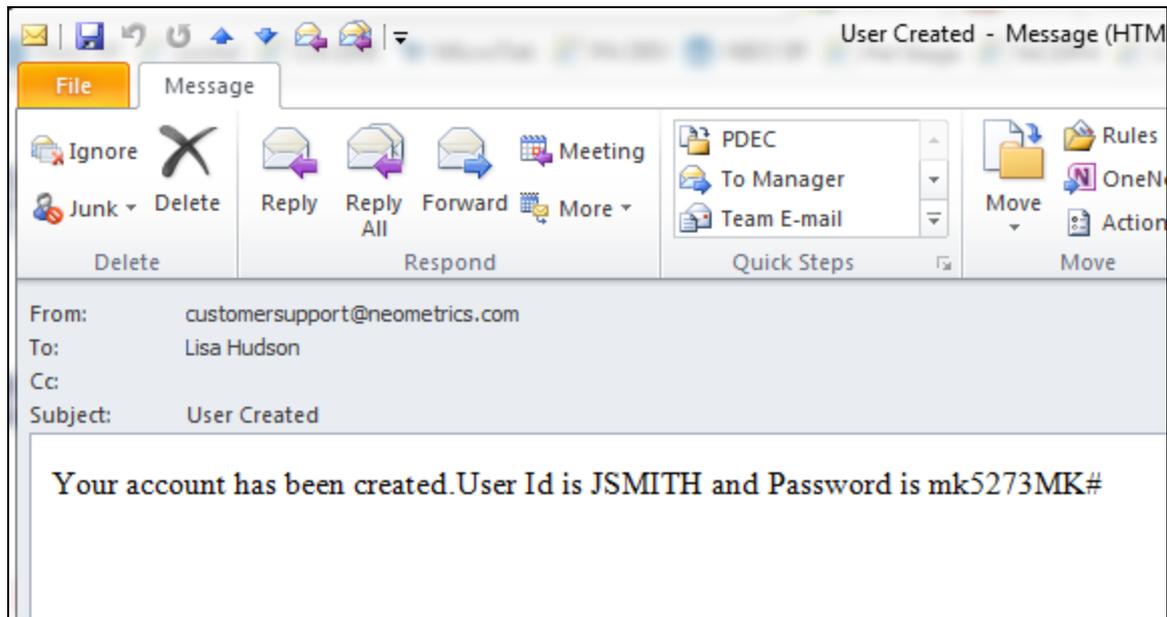


- An email will automatically be sent to the new user with their user name and initial temporary password

- 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
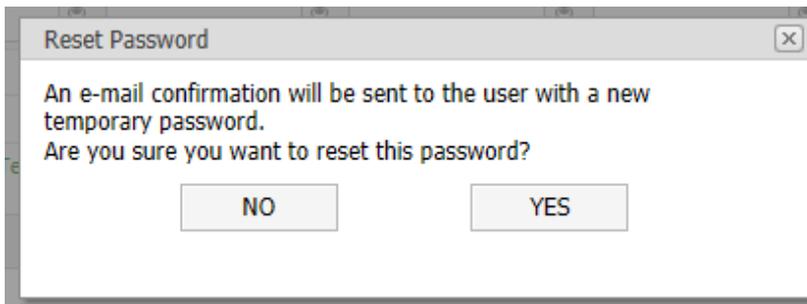




- Click "Reset Password" to reset the password for a user
- A prompt will confirm the reset and an email will be sent to the user with their new temporary password

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# Unlock User



- 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

**<u>Next Steps:</u>**

- 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 you cookies and try again