



Indiana State  
Department of Health



**Indiana Newborn Screening Tracking &  
Education Program  
(INSTEP)**

**User Guide**

## Welcome

Welcome to the Indiana Newborn Screening Tracking & Education Program (INSTEP)! This web-based application was developed by the Indiana State Department of Health (ISDH) Newborn Screening (NBS) Program in order to help ensure that all children born in Indiana receive the best possible care related to newborn screening. The mission of the Newborn Screening Program involves:

- Ensuring that every newborn in Indiana receives state-mandated screening;
- Ensuring that every infant with a presumptive positive or abnormal newborn screen receives appropriate, timely confirmatory testing and treatment and that the family receives genetic counseling; and
- Promoting public awareness and education about genetic conditions, genetic services, and newborn screening.

The Newborn Screening Program believes that the use of INSTEP will help achieve these goals by providing a centralized, web-based location for data entry and management. INSTEP will improve access to population-based, integrated, real-time data (including newborn screening results) for birthing facilities, health care providers, and NBS Program personnel. Data from INSTEP will also be used to enhance current standards of care for children diagnosed with newborn screening conditions.

This User Guide will provide you with guidance for some of the most common tasks that you will be performing in INSTEP. If you have additional questions about INSTEP, please contact Courtney Eddy, INSTEP Director, at [CEddy@isdh.IN.gov](mailto:CEddy@isdh.IN.gov) or (317) 233 – 9260.

Thank you for your participation in this exciting new application!

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## Registering for a Gateway Account

**New users** who don't have an existing ISDH Gateway account must register with the Gateway before access to INSTEP will be granted. **Please make sure you have the Gateway security code—you'll need it to complete the registration process.** In order to create an account within the Gateway:

1. **Contact Courtney Eddy at (317) 233 – 9260 to obtain the Gateway security code.**
2. **Open your Internet browser and go to <https://gateway.isdh.in.gov>.**
3. **Click the “Create New Account” link underneath the username/password boxes.**



### ISDH Gateway Messages

- Please note the <https://healthdatacenter.isdh.in.gov> URL has changed to <https://gateway.isdh.in.gov>. If you are still receiving a “security certificate” warning page, please update your link or bookmark to <https://gateway.isdh.in.gov>.

The Indiana State Department of Health – State Health Gateway is a health portal dedicated to providing information and services to health care professionals, labs, local health departments, and Health Information Exchanges (HIE) in Indiana.

The State Health Gateway web portal is a comprehensive entry point for a huge array of resources and services. Our portal provides information and resources, news, research and statistics, online tools, discussions and newsletters pertaining to Indiana health and the delivery of health care information.

### Secure Account Sign In

User Name

Password

[Forgot Password?](#)

[Create New Account](#)



4. **Enter your requested user name (usually first initial + last name), the Gateway security key, and your primary e-mail address. Click “Next.”**

- a. The Gateway security key was provided in the e-mail sent by Courtney Eddy after your INSTEP MSR training class.

Begin | Step 2: Select Application | Step 3: Enter Email | Step 4: Enter Info | Preview (Required Fields)

Fields with an (\*) indicate they are required.

Before you begin the next three steps, please enter the user name you would like to use, primary email, and the security code for the application you are registering for.

\*Security Code is required for registration. It is a code which identifies the application you will be accessing within ISDH Gateway.

\* User Name: \_\_\_\_\_

\* Security Code: \_\_\_\_\_

\* Email (Primary): \_\_\_\_\_

Application: ----

Username: ----

First Name: ----

Last Name: ----

Email (Primary): ----

Phone (Primary): ----

Organization(s): \_\_\_\_\_

Send me a confirmation email.

**5. In the Organization Information section:**

- a. For **non-ISDH users**, select the Organization Type *Hospitals – Acute Care* and select your organization from the drop-down list. Click “Next.”
- b. For **ISDH users**, select the Organization Type *Government – State* and select *Indiana State Department of Health*. Click “Next.”

**6. Complete the User Detail section by providing required information (password, first name, last name). You can leave the other fields blank.**

- a. Passwords must be a minimum of 8 characters in length and must contain an upper case letter, a lower case letter, and one number. Please select a password that you will remember!!
- b. Click “Next.”

## 7. Complete the "Contact Info" section.

- The only required portion of this section is your primary telephone number. You can fill in the other fields or leave them blank.
- Click "Confirm and Create Account" at the bottom of the left-hand side of the screen.

Begin Step 1: Organization Step 2: User Detail Step 3: Contact Info Preview (Required Fields)

Fields with an (\*) indicate they are required.

Primary contact information is only used to contact you in case of any possible account trouble. (For example, the email you enter will be used to recover/reset your lost account password.) Once registered, contact information can be updated under "My Profile"

Address: \_\_\_\_\_  
City: \_\_\_\_\_  
County: \_\_\_\_\_  
Zip: \_\_\_\_\_  
Address Type: \_\_\_\_\_

\* Phone 1: (\_\_\_\_) \_\_\_\_-\_\_\_\_ x\_\_\_\_  
Type: \_\_\_\_\_

Phone 2: (\_\_\_\_) \_\_\_\_-\_\_\_\_ x\_\_\_\_  
Type: Other

Email (Secondary): \_\_\_\_\_

Supervisor Information  
Name: \_\_\_\_\_  
Phone: (\_\_\_\_) \_\_\_\_-\_\_\_\_ x\_\_\_\_  
Email 1: \_\_\_\_\_  
Email 2: \_\_\_\_\_

Application: INSTEP  
Username: INSTEP Test User  
First Name: INSTEP  
Last Name: TestUser  
Email (Primary): instep@isdh.in.gov  
Phone (Primary): \_\_\_\_\_  
Organization(s): INDIANA STATE DEPARTMENT OF HEALTH

Send me a confirmation email.

Create Account Cancel

<< Back Confirm & Create Account >>

## 8. Click the "Create Account" button on the right-hand side.

Begin Step 1: Organization Step 2: User Detail Step 3: Contact Info Preview (Required Fields)

Fields with an (\*) indicate they are required.

Primary contact information is only used to contact you in case of any possible account trouble. (For example, the email you enter will be used to recover/reset your lost account password.) Once registered, contact information can be updated under "My Profile"

Address: \_\_\_\_\_  
City: \_\_\_\_\_  
County: \_\_\_\_\_  
Zip: \_\_\_\_\_  
Address Type: \_\_\_\_\_

\* Phone 1: (999) 999-9999 x\_\_\_\_  
Type: \_\_\_\_\_

Phone 2: (\_\_\_\_) \_\_\_\_-\_\_\_\_ x\_\_\_\_  
Type: Other

Application: INSTEP  
Username: instest123  
First Name: YES  
Last Name: YES1  
Email (Primary): instest@isdh.in.gov  
Phone (Primary): (999) 999-9999 x\_\_\_\_  
Organization(s): INDIANA STATE DEPARTMENT OF HEALTH

Send me a confirmation email.

Create Account Cancel

- After submission, you must wait for your account to be approved by a Gateway administrator. Once approved, you will receive a confirmation e-mail and be able to sign in to the ISDH Gateway and access INSTEP.

## Resetting your Gateway Password

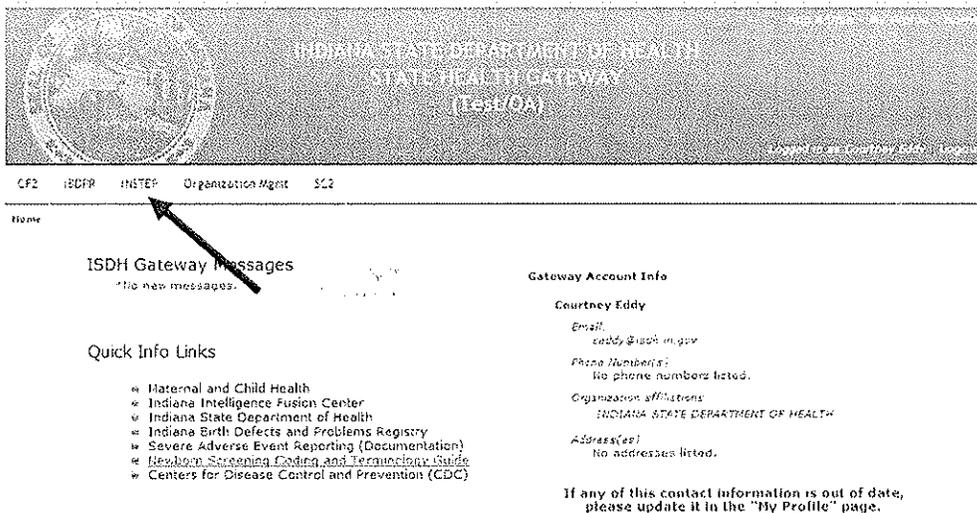
If you forget your ISDH Gateway password, follow these instructions to reset it:

1. Open your Internet browser and go to <https://gateway.isdh.in.gov>.
2. Click the “**Recover Password**” button on the toolbar.
3. Enter your Gateway user name and click the “**Submit**” button.
4. After submission, an e-mail with further instructions will be sent to your e-mail address.

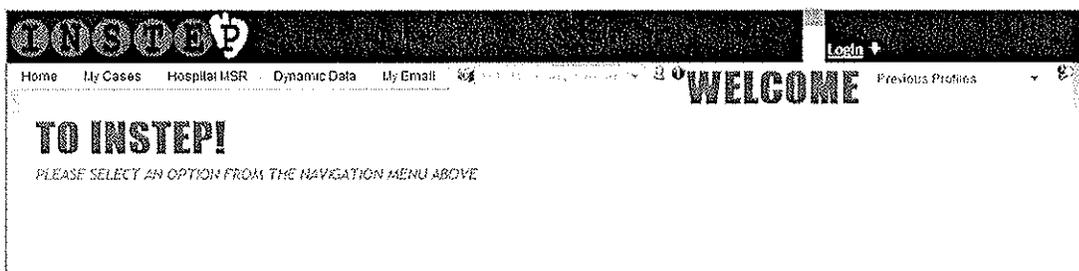
## Accessing INSTEP from the ISDH Gateway

After you register with the ISDH Gateway and your access to the INSTEP application has been verified, you will be able to access INSTEP through the Gateway. In order to sign in to the INSTEP application:

1. Open your Internet browser and go to <https://gateway.isdh.in.gov>.
2. Log in with your Gateway user name and password.
3. Click the “INSTEP” button in the toolbar to access the INSTEP application.



4. You will see the INSTEP welcome screen.



5. All users will be requested to enter a “role security code” when logging into INSTEP for the first time. **NOTE:** This is different from the Gateway and INSTEP access security codes! To obtain this role security code, please contact Courtney Eddy at (317) 233 – 9260.

## Moving within INSTEP

As you move between screens in INSTEP, you may find that you wish to move back to the previous screen.

**INSTEP users must use the “back” button located at the bottom of INSTEP to move to the previous screen. Do NOT use the “back” arrow for your Internet browser.** Using the “back” arrow of your Internet browser may prevent INSTEP from saving the information you enter and may also prevent INSTEP from being correctly displayed on your computer.

INSTEP users should utilize the “Back” button at the bottom of the INSTEP screen to move to a previous screen. Do not use the back arrow within your Internet browser.

Home My Cases Hospital MSR LIT Forms My Email Person Search Admin

### Newborn Screening Exception Entry

Use this form to report exceptions to the newborn screening test site process.

**Identify Organization and Contact Details**  
Select the organization and contact reporting the exception. If the organization is not listed to create a new record.

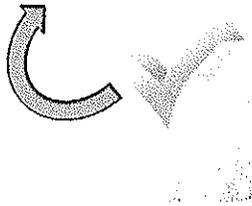
Search organizations:  (Clear)

Organization name: Indiana State Department of Health

Contact name: Select a contact

[Add Contact](#)

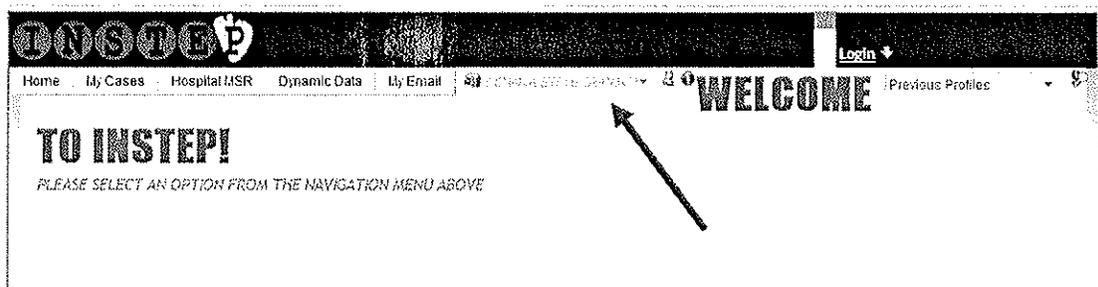
<< Back Next >>



## Monthly Summary Reports (MSRs)

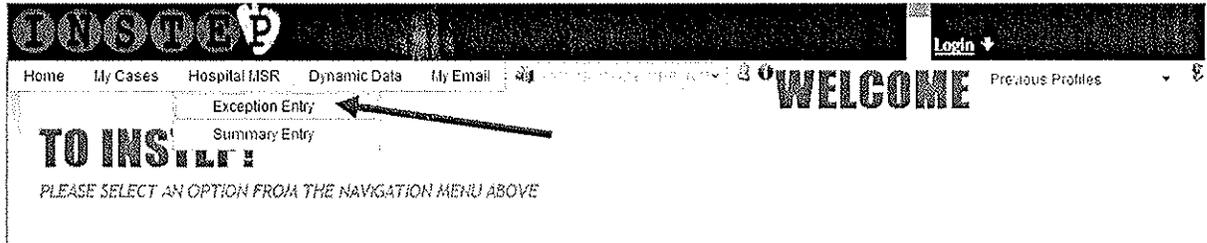
### Identifying Your Organization

Most users will **not** have to select an affiliated organization. Your primary organization will be assigned based on the information you enter during the Gateway registration process. However, **individuals who enter MSR information for more than one birthing facility** will be able to select the appropriate organization for a specific MSR by selecting the correct organization from the drop-down box located in the top middle of the INSTEP page.

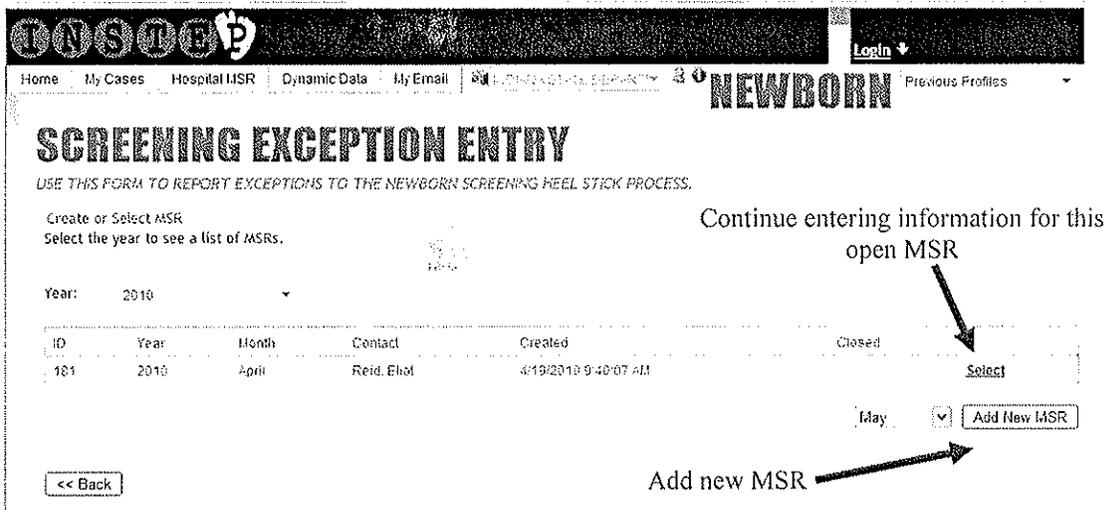


## Opening an MSR / adding a new MSR

1. In order to begin entering MSR data, hold your mouse cursor over the “Hospital MSR” tab at the top of the INSTEP welcome screen. A drop-down list with “Exception Entry” and “Summary Entry” will appear. Click on “Exception Entry.”



2. The MSR screen will show you a list of MSRs for a calendar year.
  - a. To continue entering data for an open MSR, click the “Select” link on the right-hand side.
  - b. To add a new MSR, click on the “Add New MSR” button in the lower right corner of the screen.



## Continuing an open MSR

After you select an open MSR, INSTEP will display exceptions that have already been entered within the “Current Exceptions” section.

The screenshot shows the INSTEP web application interface. At the top, there is a navigation menu with links for Home, My Cases, Hospital/MSR, LTR Forms, My Email, Person Search, Letters, Resource Center, Admin, and Log Out. The main heading is "Newborn Screening Exception Entry - August 2011". Below the heading, there is a search section for Child Record with a "Search" button. A table titled "Current Exceptions" lists two entries. A callout box on the left points to the table with the text "Exceptions that have already been entered for this MSR".

PID	Name	DOB	BO	Exception	MRN	Last First	Edit	Remove	View the Obj
553129	HEI ZIPP	07/02/2011	1	1000	147	JD	Edit	Remove	View the Obj
553134	HESON CALF	06/02/2011	1	Religious Refusal	589	JD	Edit	Remove	View the Obj

You may either enter a new exception (see section titled, “Entering New Exceptions”) or click “Edit” to edit an exception that was previously entered.

## Adding Children to MSR

To add a child to the MSR, **type in the child's Medical Record Number (MRN) and click "Search"** to look for a matching record within the INSTEP database.

**If (a) matching record(s) is/are identified**, INSTEP will display all possible matches. Click "Select" for the appropriate match.

12345

PID #	Last Name	First Name	Middle Name	Sex	DOB	ICD	ICG	Hyster's History
No records to display.								

There are some exceptions already entered on this MSR. They may be edited while the MSR is open. Please select a record below to edit the detail.

PID	Name	DOB	ICG	Exception	MRN	
4967439	ZATH, JOHN	29160501	1	Hospital Error	12345	Select Remove

**If there are no matches**, you will be automatically sent to the "Add a New Child" page.

## Entering / Editing Demographic Information for Child & Mother

When you select an existing child's record, the next INSTEP screen will give you the chance to edit and/or review the demographic information for a child and his/her mother.

**NOTE:** There are several pieces of demographic information that are helpful "behind the scenes" when attempting to match records within INSTEP. Useful data points are listed below. Points listed in **bold** are **required**:

- K-Number (the number in the lower right corner of the heelstick card)
- **Child's last name**
- Child's first name (if not known, leave this field blank and check the "Child's first name is unknown" box)
- **Child's date of birth (DOB)**
- **Child's time of birth**
- **Child's sex (gender)**
- **Child's birth order**
- Mother's medical record number (MRN)
- **Mother's name (first & last)**
- Mother's maiden name
- Mother's DOB
- **Mother's address**
- **Mother's phone number**

These data points are extremely helpful in identifying accurate matches and preventing the creation of duplicate records. Please enter this information whenever possible!

If you are entering information for a **new** child on this MSR, please enter all available information. Items marked with a red exclamation point ( ! ) are required.

Add Child Details

Enter the child and mother demographic information to identify this exception.

Child Information	
MRN:	
K-Number:	
Last Name:	! First Name: <input type="checkbox"/> Child's first name is unknown
Date of Birth:	! Time of Birth: !
Sex:	! Birth Order: 1 !
Mother Information	
MRN:	
Last Name:	! First Name: !
Maiden Name:	Date of Birth: 1/1/0001 !
Address:	IN !
Phone:	!

**NOTE:** You must enter a telephone number for the child's mother in order to complete the exception.

If you are viewing information for an existing child, please review the demographic information. If you need to update any information, click the “Edit Person Information” link for the child or mother and make changes as necessary.

**NOTE:** There are several pieces of demographic information that are helpful “behind the scenes” when attempting to match records within INSTEP. Useful data points are listed below. Points listed in **bold** are **required**:

- K-Number (the number in the lower right corner of the heelstick card)
- **Child’s last name**
- Child’s first name (if not known, leave this field blank and check the “Child’s first name is unknown” box)
- **Child’s date of birth (DOB)**
- **Child’s time of birth**
- **Child’s sex (gender)**
- **Child’s birth order**
- Mother’s medical record number (MRN)
- **Mother’s name (first & last)**
- Mother’s maiden name
- Mother’s DOB
- **Mother’s address**
- **Mother’s phone number**

These data points are extremely helpful in identifying accurate matches and preventing the creation of duplicate records. Please enter this information whenever possible!

Verify Child Details  
Verify the child's demographic information.

Child Information  
 PID: 4997169  
 Name: JOHN SMITH  
 Mother Maiden Name:  
 Date of Birth: 3/1/2010  
 Date of Death:  
 Gender: Male  
 Birth Order: 1

[Edit Person Information](#)



Click here to edit the child's demographic information.

Verify Mother Details  
Verify the mother's demographic information. An address and phone number are required to complete the exception.

Mother Information  
 PID: 4997168  
 Name: JANE SMITH  
 Maiden Name:  
 Mother Maiden Name:  
 Date of Birth: 12/31/1979  
 Date of Death:  
 Gender: Female  
 Address(es): 123 MAIN STREET INDIANAPOLIS, IN 46220  
 County:  
 Phone Number: (317) 555-0012  
 Email:

[Edit Person Information](#)



Click here to edit the mother's demographic information.

**Alternate method of editing/adding an address or phone number for the child's mother:**

Click the green "Show Others" button. The screen will expand to show you all available addresses or phone numbers associated with this child's mother. You will also be able to enter a new address or phone number. Click "Save" when complete.

Mother Information

PID: 4997201  
Name: MARY HIPPO  
Maiden Name: POTAMUS  
Mother Maiden Name:  
Date of Birth: 1/1/1980  
Date of Death:  
Gender: Female  
Address(es): 123 RIVER RD.  
AFRICA, IN 46254  
County:

Addresses Recorded

1 123 RIVER RD.  
AFRICA, IN 46254  
County:

Add Address

Address:  
City:  
State:  
Zip:

Source: INSTEP  
Last Update: 4/22/2010

↑ (Click to hide)  
↓ (Show Others)  
↑ (Click to hide)

Enter the address and click "Save."

PID: 4997201  
Name: MARY HIPPO  
Maiden Name: POTAMUS  
Mother Maiden Name:  
Date of Birth: 1/1/1980  
Date of Death:  
Gender: Female  
Address(es): 123 RIVER RD.  
AFRICA, IN 46254  
County:

Phone Number: No Saved Phones  
Phones Recorded

Add Person Phone

Number: (317) 123-4567  
Type: Home  
 Make this the primary number

Click here to enter a telephone number for the child's mother.

↑ (Click to hide)  
↓ (Show Others)  
↑ (Click to hide)

Enter the mother's phone number, select the type of phone number, and click "Save."

**When entering dates:**

- Type the requested date into the text box in a MMDDYYYY format. You do not need to enter hyphens ( - ) or slashes ( / ) between numbers.

**OR**

- Open a “calendar pop-up” by clicking on the calendar icon near the date field. This “pop-up” will allow you to scroll through the calendar year and select a date by clicking on it.

Add Child Details  
Enter the child and mother demographic information to identify this exception.

Child Information  
ARN: 00000

Last Name: ! First Name:  Child's first name is unknown

Date of Birth: ! Time of Birth:

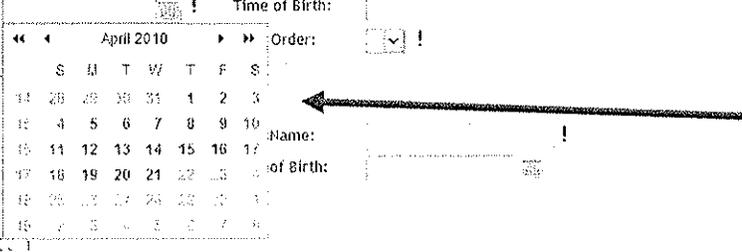
Sex: << < April 2010 > >> Order: !

	S	M	T	W	T	F	S
11	28	29	30	31	1	2	3
12	4	5	6	7	8	9	10
13	11	12	13	14	15	16	17
14	18	19	20	21	22	23	24
15	25	26	27	28	29	30	1
16	2	3	4	5	6	7	8

Mother Information  
ARN:

Last Name: ! Name: !

Maiden Name: ! Date of Birth: !



## Selecting a Physician From “My Quick List”

After you have entered demographic information for the child and the child’s mother, the next section of the Exception Entry screen will allow you to enter information for the child’s primary care provider.

### Notes about Provider Entry in INSTEP

- INSTEP will allow you to “associate” (or list) more than one physician for each child you enter as an exception. However, you may only designate ONE associated physician as the child’s primary care provider.
- PCPs are labeled in INSTEP with a red heart.
- Other associated physicians (not the child’s PCP) are labeled in INSTEP with a gray heart.
- INSTEP will save each physician you add within your Quick List, so you won’t have to search for physicians multiple times. See section below for more details on the “My Quick List” feature.

### “My Quick List” feature

INSTEP has a “My Quick List” feature that will keep & display the names and addresses of the primary care providers you most commonly use.

**In order to associate a provider on your Quick List with the current exception you’re entering, click on the “Select” link by the PCP’s name. *If this physician is the child’s PCP, please check the “PCP?” box next to the physician’s name before you click “Select.”***

• Currently, there are no providers associated with this child’s exception.

• To associate a provider from your QuickList, click the “Select” link.

• If this provider is the child’s PCP, check the “PCP?” box before you click “Select.”

My Quick List									
NAME	ADDRESS	CITY	STATE	ZIP	PHONE	EXT	PCP?	SELECT	DELETE
WIEGMAN, JARROD	123 JARROD STREET	DANVILLE	IN	44444	1234567890	00	<input type="checkbox"/>	SELECT	DELETE

There are no associated PCP(s) with this child.

INSTEP will now display the physician’s name and contact information within the “Providers Associated with This Child” box. Continue to follow these instructions to add additional physicians from your Quick List to this child’s exception.

## **Searching for & Adding a New Provider**

If the physician caring for this child is not already in your Quick List, you will need to search for him/her within INSTEP before you can add him/her as an associated provider for the child.

### **Notes about Provider Entry in INSTEP**

- Remember, INSTEP will allow you to “associate” (or list) more than one physician for each child you enter as an exception. However, you may only designate ONE associated physician as the child’s primary care provider.
- PCPs are labeled in INSTEP with a red heart.
- Other associated physicians (not the child’s PCP) are labeled in INSTEP with a gray heart.
- INSTEP will save each physician you add within your Quick List, so you won’t have to search for physicians multiple times. See section below for more details on the “My Quick List” feature.

**To associate a provider that is NOT on your Quick List to a child's exception:**

**1. Click the "Add a Provider button."**

- Currently, there are no providers associated with this child's exception.
- To associate a provider that is NOT found in your QuickList, start by clicking the "Add a Provider" button.

My Quick List									
NAME	ADDRESS	CITY	STATE	ZIP	PHONE	EXT	PCP?		
WEGMAN, JARROD	123 JARROD STREET	DANVILLE	IN	44444	1234567890	00	<input type="checkbox"/>	SELECT	DELETE

There are no associated PCP(s) with this child.

**2. INSTEP will refresh and display search boxes below the "Add a Provider" button. Enter the physician's last name (entering the first name is optional), then click "Search."**

- INSTEP will refresh & display search boxes underneath the "Add a Provider" button.
- Enter the physician's last name. Entering the first name is optional.
- Click "Search."

My Quick List									
NAME	ADDRESS	CITY	STATE	ZIP	PHONE	EXT	PCP?		
WEGMAN, JARROD	123 JARROD STREET	DANVILLE	IN	44444	1234567890	00	<input type="checkbox"/>	SELECT	DELETE

There are no associated PCP(s) with this child.

NAME	ADDRESS	CITY	STATE	ZIP	PHONE	EXT	PCP?
<input type="button" value="Add a Provider"/> <input type="button" value="Cancel"/>							

Search Providers

Provider Last Name:       Provider First Name:

3. INSTEP will refresh & display a drop-down list of all possible matches based on the name you entered.

a. **If no match is found**, INSTEP will display “No Provider Found.” Check the spelling of the name to try again.

- If you still cannot find a match, please enter the physician’s name & phone number in the “Notes” section at the bottom of the Exception Entry screen.

b. **If a match is found**, click on the drop-down arrow next to “\*\*Select a Provider\*\*” and click on the name of the physician you want to associate with this child.

• INSTEP will refresh & display a drop-down list of all the possible matches based on the name you entered.

• Click the drop-down arrow next to “Select a Provider” and click on the name of the physician you want.

File Edit View Favorites --Select a Provider--  
 JONES AMY  
 JONES ANABEL  
 JONES CHRISTOPHER  
 JONES CRYSTAL  
 JONES ERIC  
 JONES ESTHER  
 JONES GORDON  
 JONES HENRY  
 JONES JAMES  
 JONES JAMES  
 JONES JARED  
 JONES JEANINE  
 JONES JEFFREY  
 JONES JEFFREY  
 JONES JENNIFER  
 JONES JOHN  
 JONES KEVIN  
 JONES LARRY  
 JONES MARC  
 JONES MARK  
 JONES MARK  
 JONES MARY ANNE  
 JONES MICHAEL  
 JONES RADCLIFFE  
 JONES RHYS  
 JONES RICHARD  
 JONES ROBERT  
 JONES ROSEMARIE  
 JONES SCOTT  
 --Select a Provider--

MRN: JONES CRYSTAL  
 Last Name: HIPP JONES ESTHER  
 Maiden Name: POTAJONES HENRY  
 Address: 123 R JONES JAMES  
 Phone: 99999 JONES JARED  
 JONES JEANINE  
 JONES JEFFREY  
 JONES JEFFREY  
 JONES JENNIFER  
 JONES JOHN  
 JONES KEVIN  
 JONES LARRY  
 JONES MARC  
 JONES MARK  
 JONES MARK  
 JONES MARY ANNE  
 JONES MICHAEL  
 JONES RADCLIFFE  
 JONES RHYS  
 JONES RICHARD  
 JONES ROBERT  
 JONES ROSEMARIE  
 JONES SCOTT  
 --Select a Provider--

My Quick List  
 NAME ZIP PHONE EXT PCP  
 WIEGMAN, JERROD 4444 1234567890 00 [ ] SELECT DELETE

There are no associated providers  
 NAME ADDR ZIP PHONE EXT PCP  
 Add a Provider Search Providers  
 Provider Last Name: Search  
 Provider Name: --Select a Provider--

MARY  
 1-1-0001  
 12345

ZIP PHONE EXT PCP  
 Search

4. INSTEP will refresh again and display all addresses and phone numbers associated with the physician.
  - a. **To choose an address or phone number for this physician, click the “Select” link next to the correct address and next to the correct phone number. NOTE: You will need to click the “Select” link for the address AND the phone number you want to list for this physician.**

- INSTEP will refresh & display the addresses & phone numbers associated with this physician.
- To choose an address and phone number, click the “Select” links next to the correct address & the correct phone number.
- NOTE: You must click “Select” for both the address & phone number.

Search Provider:

Provider Last Name:       Provider First Name:

Provider Name:      

Provider's Contact Information

ADDRESS	CITY	STATE	ZIP		
123 S MAIN ST	KOUTS	IN	46767	<input type="button" value="EDIT"/>	<input type="button" value="SELECT"/>

Add Address

PHONE NUMBER	EXTENSION		
3179625007		<input type="button" value="EDIT"/>	<input type="button" value="SELECT"/>

Add Phone Number:

Is this the child's Primary Care Provider?

- b. If the address/phone number is/are incorrect, or if there are no addresses/phone numbers listed for this physician, click the orange “Add an Address” or “Add a Phone Number” links below the address & phone number sections.

**NOTE:** See the “When Should I Add & Edit Physician Contact Information?” section for guidance on when you should use the “Add” feature to add physician addresses and phone numbers.

INSTEP will display the “Add Provider’s Office Information” box, where you can enter the address/phone number. When you finish entering the address/phone number, click “Add.”

• If the addresses and/or phone numbers listed for this physician aren't correct, or if there are no addresses/phone numbers listed, click the "Add Address" or "Add Phone Number" links.

• INSTEP will display the "Add Provider's Office Information" box. Enter the address/phone number for the physician's office/clinic, then click "Add."

Search Provider's  
 Provider Last Name: jones Provider First Name: Search  
 Provider Name: JONES, HENRY  
 Provider's Contact Information  
 ADDRESS CITY STATE ZIP  
 No records to display  
 Add Address  
 PHONE NUMBER EXTENSION  
 ADD PHONE NUMBER  
 Is this the child's Primary Care Provider? Save Cancel

Add Provider's Office Information  
 Address  
 City  
 State IL Zip Code  
 Add Cancel

**NOTES:**

- You should **ONLY** enter contact information for the physician's office/clinic. Do **NOT** enter any personal addresses or phone numbers for the physician.
- You must enter a 5-digit ZIP code.
- You can enter just a ZIP code and skip entering the name of the city/town. INSTEP will insert this information for you.
- Phone numbers must be 10 digits in length. You do not need to add any punctuation (such as parentheses, dots, dashes, hyphens, etc.).

- c. INSTEP will refresh and display the address and/or phone number you entered. **Choose the address and phone number for this physician by clicking the “Select” link next to the correct address and next to the correct phone number. NOTE: You will need to click the “Select” link for the address AND the phone number you want to list for this physician.**

• INSTEP will refresh & display the address/phone number you entered.

• To choose an address and phone number, click the “Select” links next to the correct address & the correct phone number.

• **NOTE:** You must click “Select” for both the address & phone number.

Search Providers

Provider Last Name:  Provider First Name:

Provider Name: JONES HENRY

Provider's Contact Information

ADDRESS	CITY	STATE	ZIP		
123 S MAIN ST	KOITS	IN	46777	EDIT	SELECT

Add Address

PHONE NUMBER	EXTENSION		
3175628067		EDIT	SELECT

Add Phone Number

Is this the child's Primary Care Provider?

**5. If this physician is the child's primary care provider (PCP), check the box labeled “Is this the child's Primary Care Provider?”**

• If this physician is the child's primary care provider (PCP), check the box labeled, “Is this the child's Primary Care Provider?”

Search Providers

Provider Last Name:  Provider First Name:

Provider Name: JONES HENRY

Provider's Contact Information

ADDRESS	CITY	STATE	ZIP		
123 S MAIN ST	KOITS	IN	46777	EDIT	SELECT

Add Address

PHONE NUMBER	EXTENSION		
3175628067		EDIT	SELECT

Add Phone Number

Is this the child's Primary Care Provider?

6. Click "Save" when you are finished. INSTEP will refresh and display this physician in the box labeled "Providers Associated with this Child." **NOTE: INSTEP will also save this physician in your Quick List for future exceptions.**

• Click "Save" when you are finished.

• INSTEP will refresh & display this physician in the box labeled "Providers Associated with this Child."

Search Providers

Provider Last Name:  Provider First Name:

Provider Name: JONES HENRY

Provider's Contact Information

ADDRESS	CITY	STATE	ZIP
123 MAIN ST	SPRING	IN	46101

Add Address

PHONE NUMBER	EXTENSION
(773) 234-5678	EXT. 3456

Add Phone Number

Is this the child's Primary Care Provider?

## Editing Physician Contact Information

**NOTE:** See the “When Should I Add & Edit Physician Contact Information?” section for guidance on when you should use the “Edit” feature to update physician addresses and phone numbers.

- To edit the office address or phone number of a physician associated with a child, click on the “Edit” link next to the physician’s name.

**NOTE:** You can only edit addresses and phone numbers for physicians who are associated with a child. You cannot edit addresses or phone numbers directly from your Quick List.

**NOTE:** You can only edit physician contact information *AFTER* you have saved the exception. *INSTEP* will not allow you to edit contact information before you save.

- To edit an associated provider’s office address or phone number, click on the “Edit” link next to the physician’s name.
- You cannot edit addresses/phone numbers directly from your QuickList. You can only edit this information for a provider when he/she is associated with a child.

Associated Provider(s)									
NAME	ADDRESS	CITY	STATE	ZIP	PHONE	EAT	PCP	EDIT	DELETE
WEGMAN, JEROME	123 JARROD STREET	DANVILLE	HI	44444	1234567890	00	☑	EDIT	DELETE

- INSTEP* will refresh and display a blue box labeled, “Edit Provider’s Office Information.”

**3. Update the provider's office address and/or phone number as needed and click "Save."**

- INSTEP will refresh & display the blue "Edit Provider's Office Information" box.
- Update the physician's office address/phone number as needed.
- Click "Save" when finished.

**Associated Provider(s)**

NAME	ADDRESS	CITY	STATE	ZIP	PHONE	EXT	PCP?		
WIEGMAN, JARROD	125 JARROD STREET	DANVILLE	IN	44444	1234567890	99	<input checked="" type="checkbox"/>	EDIT	DELETE

**Edit Provider's Office Information**

WIEGMAN, JARROD

Address 999 JARROD STREET

City DANVILLE

State IN  Zip Code 44444

Phone 9999999999 Extension 999

**4. INSTEP will refresh & display the updated address and/or phone number in your Quick List and within the list of providers associated with the child.**

- INSTEP will refresh & display the updated address and/or phone number within your QuickList and within the "Associated Provider(s)" box.

**My Quick List**

NAME	ADDRESS	CITY	STATE	ZIP	PHONE	EXT	PCP?		
WIEGMAN, JARROD	999 JARROD STREET	DANVILLE	IN	44444	9999999999	999	<input type="checkbox"/>	SELECT	DELETE
JONES, HENRY	123 S MAIN ST	KOUTS	IN	46047			<input type="checkbox"/>	SELECT	DELETE

**Associated Provider(s)**

NAME	ADDRESS	CITY	STATE	ZIP	PHONE	EXT	PCP?		
WIEGMAN, JARROD	999 JARROD STREET	DANVILLE	IN	44444	9999999999	999	<input checked="" type="checkbox"/>	EDIT	DELETE

## When Should I Add & Edit Physician Contact Information?

INSTEP gives users the ability to both add & edit physicians' addresses & phone numbers. However, numerous physicians have multiple office locations. *In order to prevent duplicate listings of physicians within INSTEP, the following guidelines have been set up for users so that you can determine when to use the "Edit" feature and when to use the "Add Address" / "Add Phone Number" features.*

<u>When should I...</u>	<u>Examples</u>
Use the "Edit" feature for addresses / phone numbers	<ul style="list-style-type: none"> <li>• To <i>correct transposed numbers</i> in an address or phone number (e.g., 3175 instead of 3715)</li> <li>• To <i>add a room/suite number</i> to an existing address</li> <li>• To <i>add an extension</i> to an existing phone number</li> <li>• To <i>correct a location</i> if the hospital/clinic moves <i>within the same city</i></li> <li>• To <i>update a street name</i> in an existing address (e.g., Barnhill Drive changing to Riley Hospital Drive)</li> </ul>
Use the "Add New Address" or "Add New Phone Number" feature	<ul style="list-style-type: none"> <li>• To <i>add a completely new address</i> (different city/town, different hospital affiliation)               <ul style="list-style-type: none"> <li>• 714 Barnhill Drive (Riley campus)</li> <li>vs.</li> <li>• 123 W. 86<sup>th</sup> Street (St. Vincent campus)</li> </ul> </li> <li>• To <i>add an entirely different phone number</i> (e.g., 317-999-9999 to 812-777-7777)</li> </ul>

### **When in doubt, add a new address or phone number!!!**

When you edit an existing address/phone number, INSTEP will update the address/phone number for ALL exceptions and for ALL users.

INSTEP users need to remain cognizant of the fact that other INSTEP users may need a different office/clinic address for the same physician.

## Entering Exception Codes (Exception Entry)

The final section of the INSTEP Exception Entry screen is where you enter the actual exception information for this child. You will need to complete all of the following items to submit an exception:

1. **Transfer detail** – This section will allow you to enter “Transferred Out” or “Transferred In” information. The default setting for this box is “Not Transferred”—INSTEP users will need to select one of the options below.
  - a. **If a child was not transferred in/out**, leave the selection as “Not Transferred” and go to step 2.
  - b. **If a child was transferred out of your facility before he/she received a valid initial newborn screen**, select “Transferred Out” from the drop-down menu and then select the name of the facility where the child was transferred.

**NOTE:** You do NOT need to include children who were transferred to another facility after receiving a valid initial newborn screen. Once a child has had his/her initial newborn screen, you do not need to report any additional transfers for him/her.

The screenshot shows the 'Enter Exception Details' form. The 'Transfer Detail' dropdown is set to 'Transferred Out'. The 'Organization name' dropdown is set to 'Select an organization'. The 'Exception Type' dropdown is set to 'Select an organization'. The 'Date' field contains 'Clark Street Hospital'. The 'Notes' field contains 'General Hospital'. Below the 'Notes' field, there is a list of facility names: 'Indiana State Department Of Health', 'Monamara-Troy Clinic', 'Oceanside Wellness Centre', and 'Princeton-Plainsboro Teaching Hospital'. An arrow points to the 'Transfer Detail' dropdown with the text 'Select "Transferred Out"'. A bracket points to the list of facility names with the text 'Select the name of the facility where the child was transferred.' At the bottom left, there are buttons for '<< Back' and 'Save Ex'.

- c. If a child was transferred into your facility before he/she received a valid initial newborn screen, select “Transferred In” from the drop-down menu and then select the name of the facility that transferred the child to your facility.

**NOTE:** Again, you do NOT need to include children who were transferred to your facility after receiving a valid initial newborn screen. Once a child has had his/her initial newborn screen, you do not need to report him/her as an exception.

Enter Exception Details

Transfer Detail: Transferred In

Organization name: Clark Street Hospital

Exception Type: Clark Street Hospital

Date: General Hospital

Notes: Indiana State Department Of Health  
Monamara-Tro- Clinic  
Oceanside Wellness Centre  
Princeton-Plainsboro Teaching Hospital  
Samm Heart Hospital

<< Back Save Ex

Select "Transferred In"

Select an organization

Select the name of the facility that transferred the child to your facility.

- 2. **Exception Type** – This section allows you to enter the appropriate exception code for this child. Descriptions of each exception code follow the diagram below.

Home My Cases Hospital LISR Dynamic Data My Email NEWBORN Previous Profiles

### SCREENING EXCEPTION ENTRY

USE THIS FORM TO REPORT EXCEPTIONS TO THE NEWBORN SCREENING HEEL STICK PROCESS

Enter Exception Details

Transfer Detail: Not Transferred

Exception Type: [Dropdown]

Date:

Notes: Transfer Only  
Finally Screened  
NICU  
Initial Screen Next Month  
Deceased  
Religious Refusal  
Hospital Error  
Unauthorized Refusal

<< Back Save Ex

Select the appropriate exception code for this child.

- a. **Transfer only** – This child was transferred into / out of your facility before he/she received a valid initial newborn screen. If you select this exception code, please enter the date of the transfer and go to step 3.

- b. **Finally screened** – This child was either:
- i. A “hold-over” from the previous month (“Discharged without NBS,” “NICU,” or “Initial Screen Next Month” exception codes on the previous MSR), but received his/her initial newborn screen during this calendar month  
**OR**
  - ii. A child who was transferred into your facility & received a valid initial newborn screen before you submitted your MSR.

*If you select this exception code, please enter the date of the initial newborn screen and go to step 3.*

- c. **NICU** – This child did not receive a newborn screen during this month because he/she is in the NICU. *If you select this exception code, no additional action is required. This child will be a “hold-over” and need to be promoted on next month’s MSR. Please go to step 3.*
- d. **Initial Screen Next Month** – This child was born at the end of the calendar month, but did NOT receive his/her initial newborn screen before your facility submitted the MSR.

**Examples**

- Child born on 10/31, received NBS on 11/2; facility submitted MSR on 11/15 – This child is considered a “**normal screen**” and should **NOT** be reported on your facility’s MSR.
  - Child born on 10/31, received NBS on 11/4; facility submitted MSR on 11/1 – This child should be reported as an “Initial Screen Next Month” exception because he/she didn’t receive NBS before your facility submitted the MSR. *If you select this exception code, no additional action is required. This child will be a “hold-over” and need to be promoted on next month’s MSR. Please go to step 3.*
- e. **Deceased** – This child did not receive an initial newborn screen because he/she is deceased. *If you select this exception code, please enter the child’s date of death and then go to step 3.*

- f. **Religious Refusal** – This child did not receive a newborn screen because his/her parents completed and signed a Religious Waiver declining the screen. *If you select this exception code, please perform the following actions:*
- i. **Enter the date the Religious Waiver was completed in the “Date” box.**
  - ii. **NOTE: INSTEP users can upload and attach a digital copy of the signed Religious Waiver.** To do this, please scan the Religious Waiver into a PDF, Microsoft Word, Microsoft Excel, or image file format. *Accepted file types include the following: pdf, tiff, bmp, gif, png, doc, xls, docx, xlsx, xps, jpg, jpeg.*
  - iii. **Click “Browse” to select the appropriate file to upload. After selecting the appropriate file, click “Open.”**

Enter Exception Details

Transfer Detail: Not Transferred

Exception Type: Religious Refusal

Date:

Upload a Religious Waiver:

**ATTACHED FILES**

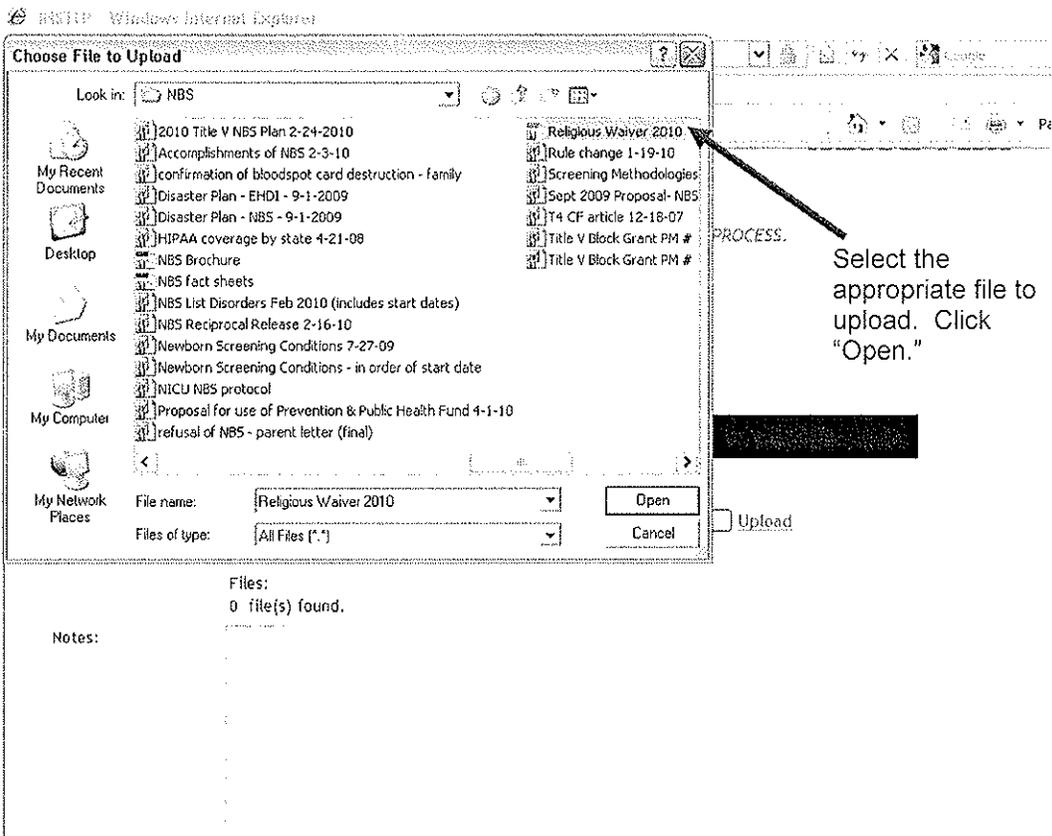
Upload an file:

Files:  
0 file(s) found.

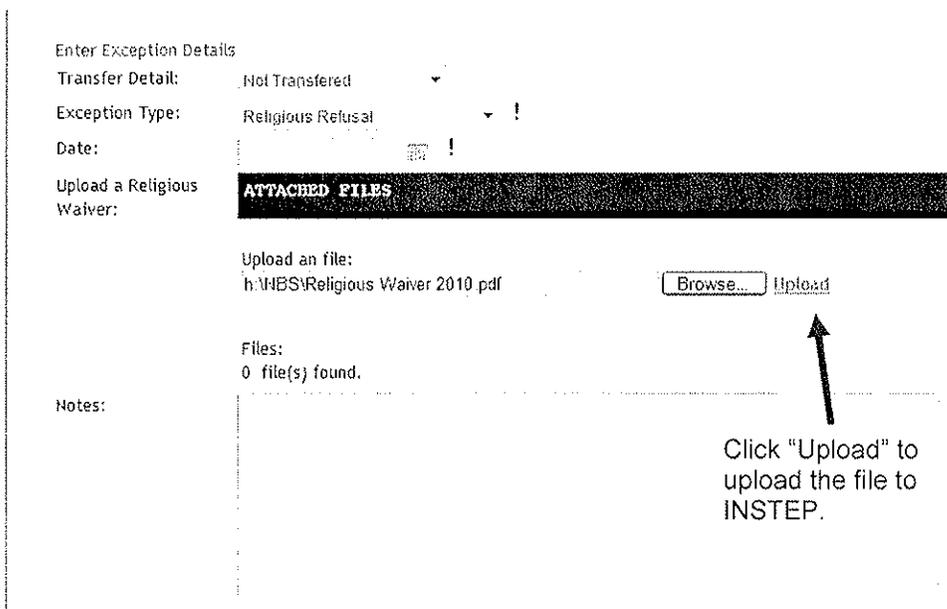
Notes:

Click “Browse” to select the appropriate scanned Religious Waiver from your computer.

Enter the date that the child’s parents completed & signed the Religious Waiver.



iv. Click “Upload” to upload the scanned Religious Waiver for this child.



- v. **The screen will refresh and say, “Attachment uploaded successfully.”** Repeat these steps if you need to attach additional files for this child. When you have uploaded all files, go to step 3.

**NOTE:** *Once you upload a file, you must save the exception in order for **INSTEP** to display the names of the file(s) you have uploaded.*

Enter Exception Details

Transfer Detail: Not Transferred

Exception Type: Religious Refusal

Date:

Upload a Religious Waiver:

ATTACHED FILES

Upload an file:

Attachment uploaded successfully.

Files:  
0 file(s) found.

Notes:

Success!

- g. **Discharged without Newborn Screen (NBS)** – This child did not receive an initial newborn screen due to an error on the part of the birthing facility (e.g., discharged from the hospital before he/she received an initial newborn screen, MRN error) or unauthorized parent refusal (e.g, parents refused NBS but did not complete/sign Religious Waiver). *If you select this exception, please enter the date that the child was discharged and go to step 3. **INSTEP** will also give you the option of uploading electronic copies of any documentation related to this child’s discharge (see pages 32 – 34 for more detailed instructions on how to upload files into **INSTEP**). This child will be a “hold-over” and need to be promoted on next month’s MSR.*

**NOTE:** Any and all children who are discharged from your facility without a newborn screen must be immediately reported to the ISDH Newborn Screening Program!

3. **Notes** – This section will allow you to enter detailed comments pertaining to this child’s exception(s). Examples: “Called child’s PCP on 3/1/11 to alert office that this child requires NBS. PCP stated that child has appointment tomorrow; PCP will collect NBS at this appointment.”

Enter Exception Details

Transfer Detail: Not Transferred

Exception Type: Initial Screen Next Month

Notes: Child born on 3/31. Will receive initial screen next month.

Enter notes for this child here.

<< Back Save Exception

When you have completed all three sections, click “Save Exception” to save this child’s information and return to the MSR screen. If your exception was saved, you will see the child’s name appear in the “Current Exceptions” section. You will also see the blue “success” banner at the top of your INSTEP screen. Repeat the steps above for all children on this month’s MSR.

Successfully added exception.

Repeat steps for remaining children on MSR.

**Exception saved successfully!**

### Newborn Screening Exception Entry - August 2011

Search for child record

To enter a new exception, input the child's Medical Record Number to search for a record already in the INSTEP database. If the child cannot be found, click the Child Not Listed button to enter the data manually.

Search

To view existing exceptions

There are some exceptions already entered on this MSR. They may be edited while the MSR is open. Please select a record below to edit the data.

ID	Name	DOB	BO	Exception	MRN	Edit	Remove	View the Child
111111	BOB DODD	01/01/2011	1	Initial	111	edit	Remove	View the Child
111112	JANEAL DODD	06/02/2011	1	Pre-pregnancy Referral	112	edit	Remove	View the Child

<< Back

## Automatic Population of Transfer Information

INSTEP has the capability to “pre-populate” or “automatically” populate transfer information for birthing facilities who receive children who are transferred from another facility.

**NOTE:** All MSR users *must* use INSTEP throughout the month in order for this feature to work. If all users submit their MSRs on the 14<sup>th</sup> of the following month, this feature will not function correctly—users at the receiving facilities will not have any transfers pre-populated. *As a reminder, please report all exceptions within 5 days of the child’s birth or within 5 days of the exception.*

### Example:

1. Parkview Hospital reports a child as being transferred to Adams Memorial Hospital on the August 2011 MSR.

Child is reported as  
"Transferred Out" to  
Adams Memorial Hospital

Enter Exception Details

Transfer Detail: Transferred Out !

Organization name: Adams Memorial Hospital !

Exception Type: Transfer Only !

Date: 8/4/2011 !

Notes:

<< Back   Reset Fields   Save Exception   View Chip    Save and go to MSR Summary entry

- Adams Memorial's MSR user logs into INSTEP to complete his/her August 2011 MSR. INSTEP will "pre-populate" the MSR with any children who have been reported as transferred to that facility. *Children who are reported as transferred to your facility will be highlighted in blue on your MSR. These children will appear in the "Unresolved Holdovers" section of your Exception Entry list.*

Children highlighted in blue in the "Unresolved Holdovers" section are children who have been reported as being transferred to your facility.

INSTEP

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MISSOURI STATE DEPARTMENT OF HEALTH

### Newborn Screening Exception Entry - August 2011

Click this page to search for children in the database or to enter data manually.

Search for Child Record

To enter a new exception, input the child's Medical Record Number to search for a record already in the INSTEP database. If the child cannot be found, click the Child Not Listed button to enter the data manually.

Search

Unresolved Holdovers

There are unresolved holdovers from last month on this MSR. These must be resolved before the current report can be submitted. Please select a holdover below to propose the record to an exception on the current report.

ID	ID	Name	DOB	BO	Exception	MRN	Test Date		Accept	Decline
5137197	1139	AAFOVAPK, EUG	08-03-2011	1	Transfer Only	193456	✓		Accept	Decline
5137198	1140	ANY, PAPA	08-03-2011	1	Transfer Only	193457	✓		Accept	Decline
5137211	1141	ADLERSE, CARL	08-04-2011	1	Transfer Only	193458	✗		Accept	Decline
5137219	1146	CAY, SASHA	08-04-2011	2	Transfer Only	193459	✗		Accept	Decline

- If you hover over the "Accept" link, INSTEP will display a small pop-up that will tell you which facility reported the child as being transferred to your facility.

INSTEP

Home My Cases Hospital MSR LIT Forms My Case Person Search Letters Resource Center Admin

MISSOURI STATE DEPARTMENT OF HEALTH

### Newborn Screening Exception Entry - August 2011

Click this page to search for children in the database or to enter data manually.

Search for Child Record

To enter a new exception, input the child's Medical Record Number to search for a record already in the INSTEP database. If the child cannot be found, click the Child Not Listed button to enter the data manually.

Search

Unresolved Holdovers

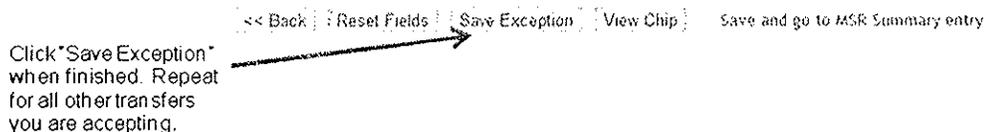
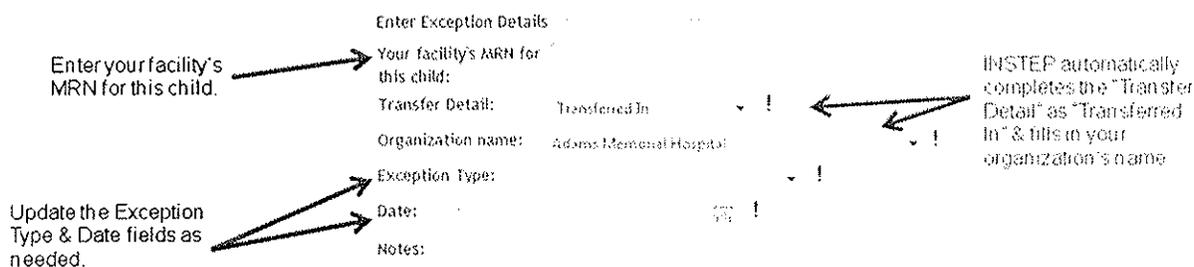
There are unresolved holdovers from last month on this MSR. These must be resolved before the current report can be submitted. Please select a holdover below to propose the record to an exception on the current report.

ID	ID	Name	DOB	BO	Exception	MRN	Test Date		Accept	Decline
5137197	1139	AAFOVAPK, EUG	08-03-2011	1	Transfer Only	193456	✓		Accept	Decline
5137198	1140	ANY, PAPA	08-03-2011	1	Transfer Only	193457	✓		Accept	Decline
5137211	1141	ADLERSE, CARL	08-04-2011	1	Transfer Only	193458	✗		Accept	Decline
5137219	1146	CAY, SASHA	08-04-2011	2	Transfer Only	193459	✗		Accept	Decline

Hold your mouse over the "Accept" link to see which facility reported this child as being transferred to your facility

4. Users have two options:

- a. **Accept:** If the child has been transferred to your facility, click “Accept.” INSTEP will take you to the Exception Entry screen.
  - i. INSTEP will pre-populate the transfer code as “Transferred In” & automatically complete the “Organization Name” field with your facility’s name.
  - ii. Enter your facility’s MRN for the child.
  - iii. Update the “Exception Type” as needed. For example, if the child has received his/her initial NBS, you will select “Finally Screened.” *See the “Using Lab Results to Update an Exception” section for more information.*
  - iv. Enter a date (e.g., date of NBS) if applicable.
  - v. Click “Save Exception” when finished.
  - vi. Repeat these steps for any additional transfers you are accepting.



- b. **Decline:** If the child is not at your facility, click “Decline.” INSTEP will remove the child from your MSR & re-assign this child’s exception to his/her birthing facility. See “*Editing a Declined Transfer*” section for more information.

The screenshot shows the INSTEP web application interface. At the top, there is a navigation bar with the INSTEP logo and various menu items like Home, My Cases, Hospital MSR, etc. The main heading is "Newborn Screening Exception Entry - August 2011". Below this, there is a search section for child records. A table displays the search results with columns for ID, ID#, Name, DOB, BO, Exception, MSR#, Lab Data, and two buttons: "Accept" and "Decline".

ID	ID#	Name	DOB	BO	Exception	MSR#	Lab Data	Accept	Decline
S11107	1136	GAFFNEY, LUE	08/21/2011	1	Transfer Only	185426	<input checked="" type="checkbox"/>	Accept	Decline
S11126	1140	AND, PAPA	08/21/2011	1	Transfer Only	184363	<input checked="" type="checkbox"/>	Accept	Decline
S11111	1141	ANTHONY, CALE	08/25/2011	1	Transfer Only	185431	<input checked="" type="checkbox"/>	Accept	Decline
S11119	1142	CAI, DALE	08/24/2011	1	Transfer Only	18435	<input checked="" type="checkbox"/>	Accept	Decline

If the child is not at your facility, click the "Decline" link. INSTEP will remove the child from your MSR & re-assign this child's exception to his/her birthing facility.

**NOTE:** You must accept or decline all transfers before you can close your MSR.

## Editing a Declined Transfer

When a hospital declines a reported transfer, INSTEP re-assigns that child's exception to his/her birthing facility. *Children whose transfers are declined will be highlighted in red on your MSR. These children will appear in the "Unresolved Holdovers" section of your Exception Entry list.*

Hover your mouse over the "Edit Declined Transfer" link to see which facility declined the transfer.

Use this form to report exceptions to the newborn screening (MSR) database.

Search for Child Record

To enter a new exception, input the child's Medical Record Number to search for a record already in the INSTEP database. If the child cannot be found, click the Child Not Listed button to enter the data manually.

Search

There are unresolved holdovers from last month on this MSR. These must be resolved before the current report can be submitted. Please select a holdover below to prompt the record to an exception on the current report.

ID	IO	Name	DOB	IO	Exception	MSR	Actions
030113	1146	CAT, SADI	08/04/2011	2	Transferred Only	14329	<a href="#">Edit Declined Transfer</a>

Children whose transfers were declined by the receiving facility will be re-assigned to the birthing facility. These children will be highlighted in red on the "Unresolved Holdovers" section of your MSR.

Hover your mouse over the "Edit Declined Transfer" link to see which facility declined the transfer.

In order to correct the declined transfer:

1. Click the "Edit Declined Transfer" link. INSTEP will take you to the Exception Entry screen for this child.

Use this form to report exceptions to the newborn screening (MSR) database.

Search for Child Record

To enter a new exception, input the child's Medical Record Number to search for a record already in the INSTEP database. If the child cannot be found, click the Child Not Listed button to enter the data manually.

Search

There are unresolved holdovers from last month on this MSR. These must be resolved before the current report can be submitted. Please select a holdover below to prompt the record to an exception on the current report.

ID	IO	Name	DOB	IO	Exception	MSR	Actions
030113	1146	CAT, SADI	08/04/2011	2	Transferred Only	14329	<a href="#">Edit Declined Transfer</a>

Click the "Edit Declined Transfer" link

2. You can correct any information necessary. *Most of the time, the transfer will be declined because an MSR user accidentally selected the wrong facility name within “Organization Name.”*
  - a. For example, if an MSR user accidentally selected “Adams Memorial Hospital” instead of “Auburn Birthing Center,” Adams Memorial would decline the transfer.
  - b. The exception would be re-assigned to the child’s birthing facility, which would edit the declined transfer so that the organization name correctly read “Auburn Birthing Center.”
3. Click “Save Exception” when you are finished editing the declined transfer.
  - a. INSTEP will re-assign the transfer to the new organization.
4. Repeat for all other declined transfers on your MSR.

Update any information for this child as needed. Most transfers will be declined because an incorrect organization was accidentally selected.

In this example, the MSR user at the child’s birthing facility corrected the organization name to Auburn Birthing Center.

Enter Exception Details

Transfer Details: Transferred Out !

Organization name: Auburn Birthing Center !

Exception Type: Transfer Only !

Date: 8/4/2011 !

Notes:

<< Back | Reset Fields | Save Exception | View Chip | Save and go to MSR Summary entry

Click “Save Exception” when you are finished editing the declined transfer. INSTEP will re-assign this transfer to the new organization.

Repeat for all other declined transfers on your MSR.

**NOTE:** Remember, all MSR users *must* use INSTEP throughout the month in order for this feature to work. If all users submit their MSRs on the 14<sup>th</sup> of the following month, this feature will not function correctly—users at the receiving facilities will not have any transfers pre-populated. *As a reminder, please report all exceptions within 5 days of the child’s birth or within 5 days of the exception.*

**NOTE:** *You must edit all declined transfers before you can close your MSR.* However, if a facility declines a transfer from your facility *after* your MSR is closed, INSTEP will assign the child’s transfer to the INSTEP Director for follow-up.

## Utilizing NBS Laboratory Results to Promote Exceptions

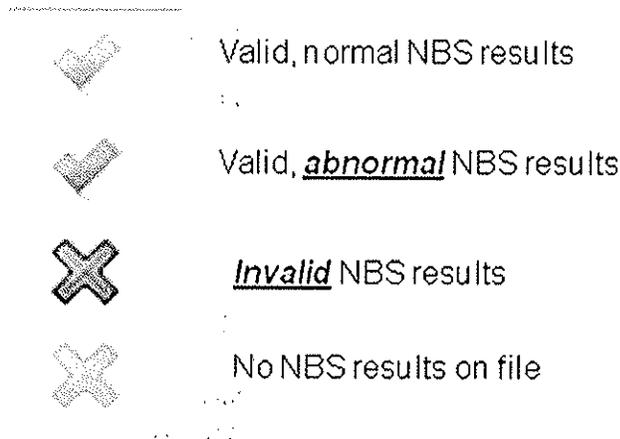
INSTEP integrates newborn screening (NBS) laboratory results with reported exceptions so that you can quickly see:

- If an initial newborn screen has been performed,
- If the child has a **valid** newborn screen on file, and
- If the results of the newborn screen were normal or abnormal.

As you save exceptions on your MSR, INSTEP will attempt to match the child you reported to his/her newborn screening results within the larger ISDH database. *Similarly, if a child is reported as being transferred to your facility OR is a holdover from a previous MSR, INSTEP will display lab results for the child if they are available.*

INSTEP uses the following icons to display results:

- **Green checkmark:** Valid, normal NBS lab results
- **Orange checkmark:** Valid, *abnormal* NBS lab results
- **Red "X":** *Invalid* NBS lab results
- **Gray "X":** No NBS lab results available



You can hover your mouse over any of these icons for a “pop-up” that gives more detailed information about what the icon represents.

### Current Exceptions

There are some exceptions already entered on this MSR. They may be edited while the MSR is open. Please select a record below to edit the details.

ID#	Name	DOB	ID	Exception	MM#	Lab Data	Edit	Remove	View the Chip
314207	AARDYAK, CYN	04-04-2011	1	Transfer Only	769496		Edit	Remove	View the Chip
314769	AND, PUSK	08-02-2011	1	Transfer Only	234567		Edit	Remove	View the Chip
313740	ANDERSON, CARI	08-03-2010	1	Transfer Only	310451		Edit	Remove	View the Chip
313711	BOWEN, REGAL	08-02-2011	1	Labious Refusal	23		Edit	Remove	View the Chip
313715	LABBER, JET	08-02-2011	1	Discharge without NBS	15		Edit	Remove	View the Chip
313717	CAT, JACK	08-04-2011	1	Transfer Only	14027		Edit	Remove	View the Chip
313719	CAT, SAMI	07-04-2011	2	Transfer Only	14526		Edit	Remove	View the Chip

Hover your mouse over any of the Lab Data icons for more information about what the icon represents.

## Reviewing NBS results on file for the child

The NBS lab data you see in INSTEP can be utilized to review the NBS results on file for the child.

In order to view detailed information about any lab results on file (valid/invalid and normal/abnormal), click on the NBS Lab Data icon for the child.

INSTEP will display the NBS Lab Data “pop-up,” which will show you additional information about that child’s NBS results, including:

1. ***Requisition number*** for each NBS sample that has been collected & processed for this child
2. ***Date of collection*** for each NBS sample that has been collected & processed
3. ***Name of the facility that submitted*** each NBS sample
4. There are also three indicators that the Newborn Screening Laboratory utilizes to determine whether an individual NBS sample was valid or invalid. These indicators are:
  - a. ***Specimen Quality***: Was the specimen collected without any quality flags (such as oversaturation, uneven saturation, QNS, etc.)?
  - b. ***Age > 48 Hours***: Was the specimen collected after the child was at least 48 hours old?
  - c. ***Feeding Time***: Was the specimen collected after the child has been on protein feed for at least 24 hours?

**NOTE:** Remember, for a newborn screening sample to be considered valid, it must be collected after the child is at least 48 hours old **AND** after the child has been on protein feed for at least 24 hours. In addition, the sample cannot be oversaturated, QNS, etc. ***If any of these quality indicators are invalid (marked with a red “X”), the sample is considered invalid. A repeat specimen is required for this child.*** Results will not be reported within INSTEP.

5. ***Results:*** Were the results of this sample normal or abnormal? *Results will only be displayed for valid NBS specimens.*

See the next page for examples of how NBS lab results are displayed within INSTEP.

**Valid, normal NBS results:** You will see green checkmarks for all of the quality indicators, plus a green checkmark for “Results.”

**Lab Data** x

*Lab result data reported to INSTEP*

Req. No	Collection Date	Submitting Facility	Specimen Quality	Age > 48 Hrs	Feeding Time	Results
K710362	8/4/2011	WOMENS HOSPITAL, THE	✔	✔	✔	✔

[Update Exception From Lab Results](#)

**Valid, abnormal NBS results:** You will see green checkmarks for the three quality indicators and a red “X” for “Results.”

**Lab Data** x

*Lab result data reported to INSTEP*

Req. No	Collection Date	Submitting Facility	Specimen Quality	Age > 48 Hrs	Feeding Time	Results
K683293	8/5/2011	CLARIAN HEALTH PARTNERS INC D/B/A METHODIST, IU, RILEY HOSPITAL	✔	✔	✔	✘

[Update Exception From Lab Results](#)

**Invalid NBS results:** You will see a red “X” for at least one of the three quality indicators. In this example, the child’s NBS sample was invalid because the specimen was collected before the child was 48 hours old.

**Lab Data** x

*Lab result data reported to INSTEP*

Req. No	Collection Date	Submitting Facility	Specimen Quality	Age > 48 Hrs	Feeding Time	Results
K714147	8/4/2011	DAVISS COMMUNITY HOSPITAL	✔	✘	✔	✘

[Update Exception From Lab Results](#)

## Promoting an exception using NBS lab results

The NBS lab data you see in INSTEP can also be used to promote exceptions to “Finally Screened.”

**NOTE:** *Exceptions can be promoted from valid, normal NBS results OR from valid, abnormal NBS results.*

Remember, ISDH is charged with ensuring that every child receives a valid initial screen. Children whose lab results are abnormal are receiving appropriate follow-up services, but that is outside the scope of the MSR portion of INSTEP.

You can promote an exception based on lab data in two ways:

### 1. Promoting an exception directly on the MSR Exception Entry screen

- a. If a child has valid NBS results on file in INSTEP, click on the green checkmark (for valid, normal results) or orange checkmark (for valid, abnormal results) to open the “NBS Lab Data” pop-up.
- b. Within the NBS Lab Data pop-up, you will see a button that says, “Update Exception From Lab Results.” Click this button to promote this child’s exception to “Finally Screened.”

**NOTE:** The “Update Exception From Lab Results” button can only be used if valid NBS results are on file. If a child has invalid results, you will see this button, but you will not be able to click it.

Req. No	Collection Date	Submitting Facility	Specimen Quality	Age > 48 Hrs	Feeding Time	Results
K710362	5/4/2011	WOMENS HOSPITAL, THE	✓	✓	✓	✓

Update Exception From Lab Results

Click the “Update Exception From Lab Results” button in the Lab Data pop-up to promote the child’s exception.

- c. INSTEP will refresh & re-display the MSR Exception Entry page. The child whose exception you just promoted will now be displayed with a “Finally Screened” exception.

**INSTEP** Log Out

Home My Cases Hospital MSR LTR Forms My Email Person Search Letters Resource Center Admin

MINNESOTA STATE DEPARTMENT OF HEALTH

### Newborn Screening Exception Entry

*This link points to Report exceptions to the newborn screening test data system.*

**Search for Child Record**  
To enter a new exception, input the child's Medical Record Number to search for a record already in the INSTEP database. If the child cannot be found, click the Child Not Listed button to enter the data manually.

Search

There are some exceptions already entered on this MSR. They may be edited while the MSR is open. Please select a record below to edit the detail.

ID	Name	DOB	BO	Exception	MRN	Lab Data	Full	Remove	View the Chip
MS1213	ADAMSON, CAG	04/20/2011	1	Finally Screened	767458	✓			

After clicking the "Update Exception From Lab Results" button in the Lab Data pop-up, INSTEP will refresh to display the child with a "Finally Screened" exception.

- d. If you promote an exception using lab results, INSTEP will also automatically include a notation in the “Notes” section of the child’s Exception Entry screen for the child that reads, “Exception Updated by Lab Data.” **Do not delete this note!**

**Enter Exception Details**

Transfer Detail: Transferred Out

Organization name: Adams Memorial Hospital

Exception Type: Finally Screened

Date: 8/4/2011

Notes: Exception updated by lab data

INSTEP automatically writes a "Note" on the Exception Entry screen for all children whose exceptions are updated by lab data. **Do not delete this note!**

## 2. Promoting an exception from a child's Exception Entry screen

- a. If a child has valid NBS results on file, you can also click the "Edit" link to open a child's Exception Entry screen.

The first time you visit this page, you will see instructions on how to manually create a new Exception Entry.

**Search for Child Record**  
To enter a new exception, input the child's Medical Record Number to search for a record already in the INSTEP database. If the child cannot be found, click the Child Not Listed button to enter the data manually.

MSR#

**Current Exceptions**  
There are some exceptions already entered on this MSR. They may be edited while the MSR is open. Please select a record below to edit the detail.

FID	Name	DOB	BO	Exception	MRN	Lab Date

Click the "Edit" link to go to the child's Exception Entry screen to manually promote an exception

- b. INSTEP will display the child's Exception Entry page. To update the exception:
  - i. Scroll to the bottom of the Exception Entry screen.
  - ii. Change the Exception Type to "Finally Screened."
  - iii. Enter the date that the child's NBS was performed.
  - iv. Click "Save Exception."
  - v. INSTEP will **not** automatically include a note within the "Notes" section to state that the exception was promoted from NBS lab data.

Enter Exception Details

Transfer Detail: Transferred Out

Organization name: Adams Memorial Hospital

Exception Type: Finally Screened

Date: 8/2/2011

Notes:

1. Scroll to the bottom of the Exception Entry screen.
2. Change the Exception Type to "Finally Screened."
3. Enter the date the child's NBS was performed.
4. Click "Save Exception" when finished.

<< Back   Reset Fields   Save Exception   View Chip   Save and go to MSR Summary entry

## Entering MSR Summary Data (“Summary Entry”)

After you have entered all exceptions for this month’s MSR and are ready to enter your MSR Summary data, **hover your mouse over the “Hospital MSR” tab at the top of the INSTEP screen. A drop-down list will appear. Click on “Summary Entry.”**

INSTEP Login

Home My Cases Hospital MSR Dynamic Data My Email Exception added Previous Profiles

successfully! Exception Entry Summary Entry

### NEWBORN SCREENING EXCEPTION ENTRY

USE THIS FORM TO REPORT EXCEPTIONS TO THE NEWBORN SCREENING HEEL STICK PROCESS.

Search for Child Record  
To enter a new exception, input the child's Medical Record Number to search for a record already in the INSTEP database. If the child cannot be found, click the Child Not Listed button to enter the data manually.

Search

There are some exceptions already entered on this MSR. They may be edited while the MSR is open. Please select a record below to edit the detail.

PID	Name	DOB	BO	Exception	LRN	Select	Remove
4997169	SMITH, JOHN	20100301	1	Initial Screen Next Month	12345	Select	Remove
4997175	JONES, ERIC	20100301	1	Transfer Only	12346	Select	Remove
4997183	RANCHO, JUAN	20100301	1	Religious Refusal	123457	Select	Remove
4997195	KYJO, REAH	20100301	1	Initial Screen Next Month	123458	Select	Remove
4997197	SULLY, JASMINE	20100301	1	Religious Refusal	123459	Select	Remove

<< Back

The screen will refresh with a list of open MSRs for your organization. Select the appropriate MSR to enter summary data.

INSTEP Login

Home My Cases Hospital MSR Dynamic Data My Email HOSPITAL Previous Profiles

### MSR SUMMARY

SUBMIT A SUMMARY OF BIRTH DATA WHEN ALL EXCEPTIONS HAVE BEEN ENTERED FOR THE MONTH

Please select an MSR to view or enter summary data.

Search organizations: Search Clear

Organization name: Indiana State Department Of Health

Year: 2010

ID	Year	Month	Contact	Created	Closed	Select
162	2010	April	Klopfer, Ben	4/14/2010 1:28:34 PM		Select

Add New MSR

1. The screen will refresh and display the MSR Summary Data form. **Enter the following information:**
  - a. **Total number of live births at your facility this month**
  - b. **Total number of home births that received an initial newborn screen at your facility this month**
  - c. **Total number of walk-in patients who received an initial newborn screen at your facility this month**
  
2. The number of exceptions reported and the number of screens will be *automatically calculated* based on the data that you provide.

**NOTE:** To move between the summary data fields, click your mouse on each box **OR** use the “Tab” key on your keyboard. INSTEP will not calculate the number of screens performed each month until you have entered all required summary data.

**MSR SUMMARY**  
 SUBMIT A SUMMARY OF BIRTH DATA WHEN ALL EXCEPTIONS HAVE BEEN ENTERED FOR THE MONTH

Please select an MSR to view or enter summary data.

Search organizations:

Organization name: Indiana State Department Of Health

Year: 2016

ID	Year	Month	Contact	Created	Closed
<input type="button" value="Add New MSR"/>					

MSR Summary Data  
 Please enter the summary data for the MSR. Enter the total number of live births, home births, and walk-ins that received newborn screening at your facility during the month. Exceptions reported and number of normal screens will be calculated automatically based on entered data.

MSR Status:

Number of live births:

Number of home births that received screening:

Number of walk-ins that received screening:

Number of exceptions reported:

Number of screens:

Enter the total number of live births, home births that received screening, & walk-ins that received screening at your facility this month. Exceptions reported and # of screens will be automatically calculated.

**NOTE:** If you need to come back later to complete entering summary data for this MSR, click “Save.” This MSR will be saved within the INSTEP MSR Summary Entry section until you come back.

## Submitting Your MSR

When you have correctly entered all information and are ready to complete this MSR, click “Save and Close.” The screen will refresh and show you the date and time that you submitted the MSR.

**INSOBI** Login

Home | My Cases | Hospital MSR | Dynamic Data | My Email | **NEWBORN** | Previous Profiles

### SCREENING EXCEPTION ENTRY

USE THIS FORM TO REPORT EXCEPTIONS TO THE NEWBORN SCREENING HEEL STICK PROCESS.

Create or Select MSR  
Select the year to see a list of MSRs.

Year: 2010

ID	Year	Month	Contact	Created	Closed	
162	2010	April	Klopfert, Ben	4/14/2010 1:28:34 PM		Select
241	2010	August	Klopfert, Ben	8/22/2010 12:15:16 PM	4/22/2010 12:31:52 PM	Select

May Add New MSR

### Do NOT submit your MSR until you are completely finished!

Once you click “Save and Close,” your MSR has been submitted to ISDH, and you cannot update or change it. If you wish to return to your MSR at a later date, please click “Save” – do NOT click “Save and Close” until you are ready to submit to ISDH!!

### MSRs are due to ISDH by 5 pm on the first business day after the 14<sup>th</sup> of the month.

Typically, the due date will be the 15<sup>th</sup> of the month.  
If the 15<sup>th</sup> falls on a weekend, MSRs are due to ISDH by 5 pm the following Monday.

## Printing Your MSR

INSTEP allows you to print a copy of each month's MSR for your facility's records. **NOTE:** *MSRs print in a read-only PDF format. INSTEP users are not able to alter the MSR or printout in any fashion.*

You can print an MSR from the MSR Monthly Exception Report screen or from the Exception Entry screen. **NOTE:** *For information on printing an MSR from the MSR Monthly Exception Report screen, please see the "MSR Reports" section of this User Guide.*

### To print an MSR from the Exception Entry screen:

1. Log into INSTEP and go to the Exception Entry screen by hovering your mouse over the "Hospital MSR" menu and clicking "Exception Entry."
2. Click on the "Print" link next to the name of the MSR you want to print.

• Click the "Print" link next to the MSR you wish to print.

INSTEP

Home My Cases Hospital MSR LTF Forms My Email Person Search Admin

Previous Facilities

### Newborn Screening Exception Entry

Use this form to request exceptions to the newborn screening heel stick process.

Create or Select MSR  
Select the year to see a list of MSRs.

Year: 2011

ID	Year	Month	Contact	Created	Closed	Select	Print
770	2011	May		6-8-2011 8:41:04 AM			

June Add New MSR

<< Back

3. **INSTEP will automatically take you to the MSR Monthly Exception Report screen and display the selected MSR (with the correct month and year). The MSR will be displayed in the bottom half of your screen.**

- INSTEP will automatically take you to the MSR Monthly Exception Report.

- The MSR you selected will automatically be displayed in the lower half of the screen.

The screenshot shows the INSTEP web application interface. At the top is a navigation bar with the INSTEP logo and a 'Login' button. Below the navigation bar is a menu with options: Home, My Cases, Hospital MSR, LTF Forms, My Email, Person Search, and Admin. The main content area is titled 'MSR Monthly Exception Report' and includes a 'Return to Hospital MSR Reports page' button. Below the title, there is a form with the following fields: Facility (BLOOMINGTON HOSPITAL), Year (2011), and Month (May). There are also 'Run' and 'Clear' buttons. The report content is displayed in a box with the following information: MSR MONTHLY EXCEPTION REPORT, Facility : BLOOMINGTON HOSPITAL, Year : 2011, Month : May, MSR Created By : Alex Litvan, Opened : 6/9/2011, and Closed :

4. To print a hard (paper) copy of the MSR, scroll to the bottom of the screen and hover your mouse over the MSR report. You should see the Adobe Acrobat toolbar appear.
5. Click on the printer icon to print the report.

- Scroll to the bottom of your screen & hover your mouse over the MSR report. The Adobe Acrobat toolbar will appear.
- Click on the "Print" icon.

Number of home births that received screening	1
Number of walk-ins that received screening	0
Number of exceptions reported	6
Total number of screens	21



Print (Ctrl+P)



Indiana State  
Department of Health



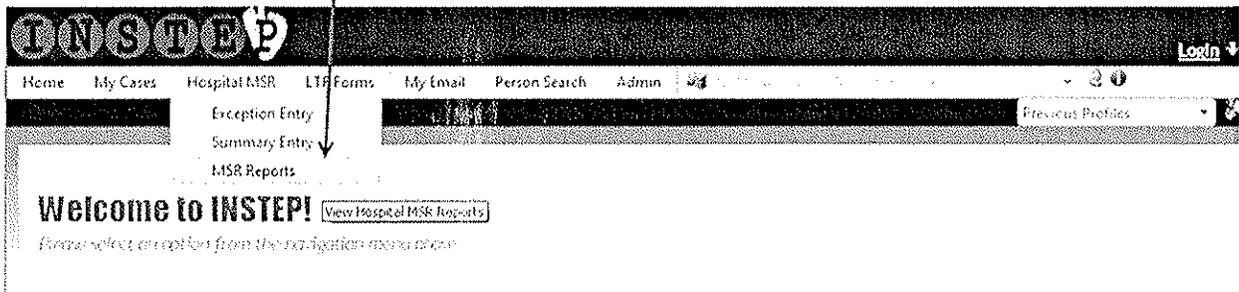
6. To print another MSR, change the date fields (month and year) at the top of the MSR Monthly Exception Report screen, then click "Run." Repeat this step as needed to print additional reports.

## MSR Reports

INSTEP allows users to run specific reports so that each facility can track its progress and performance. To access the INSTEP MSR Reports:

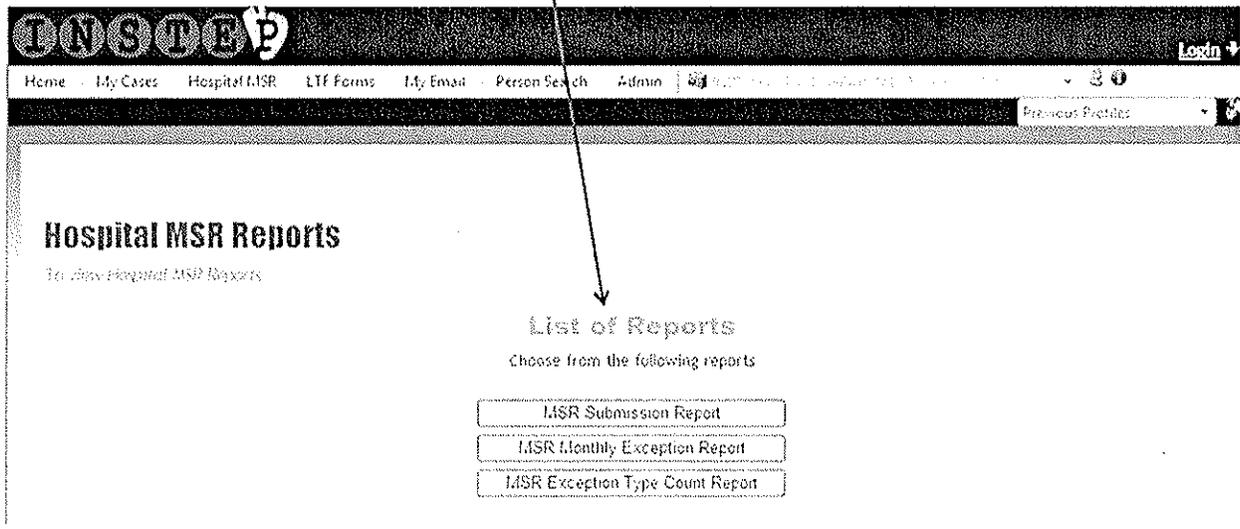
1. **Hover your mouse over the “Hospital MSR” menu.**
2. **Click “MSR Reports” from the menu.**

- Hover your mouse over the “Hospital MSR” menu.
- Click on “MSR Reports.”



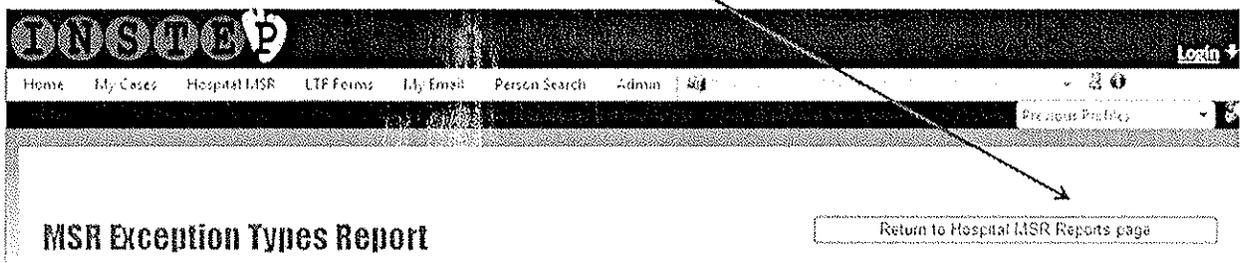
### 3. INSTEP will display the Hospital MSR Reports page.

- INSTEP will display the Hospital MSR Reports screen.
- Click on the button of the report you wish to view and/or print.



**NOTE:** Each MSR Report page contains a button in the upper-right corner that reads, "Return to Hospital MSR Reports page." You can click this button from any of the MSR Reports screens to return to the Hospital MSR Reports page and select another MSR report.

- Click this button to on any MSR Reports screen to return to the Hospital MSR Reports screen & select another report.



4. **Select one of the following reports to run:**
- a. **MSR Submission Report:** Includes the following items:
    - i. A grid that lists:
      - 1. Name of facility
      - 2. Selected year
      - 3. Name of person who created each MSR within the selected year
      - 4. Date each MSR was created
      - 5. Date each MSR was closed
      - 6. Status of all MSRs for a selected year (e.g., whether each MSR was submitted on time/late or is missing/open)
    - ii. A grid that summarizes the status (e.g., how many MSRs within the selected year were submitted on time? How many MSRs were late?)

**See page 46 for an example of an MSR Submission Report.**

- b. **MSR Monthly Exception Report:** Includes the following items:
  - i. Facility name
  - ii. Month/year of MSR
  - iii. Name of person who created MSR
  - iv. Date MSR was opened in INSTEP
  - v. Date MSR was closed in INSTEP
  - vi. List of individual exceptions reported for that month. For each exception, this report displays:
    - 1. PID (person unique identifier)
    - 2. Infant's name
    - 3. Infant's date of birth
    - 4. Exception code assigned to that infant
    - 5. Infant's Medical Record Number (MRN)
  - vii. List of summary data submitted for that month (as submitted by your facility)

**See page 49 for an example of an MSR Monthly Exception Report.**

- c. **MSR Exception Type Count Report:** Includes the following items:
  - i. Facility name
  - ii. Selected month(s) and year(s)
  - iii. The total number of each exception type reported in each selected month(s) and year(s) (e.g., 2 NICU, 3 transfer only in March 2011)
    - i. The total number of each exception type reported in each selected month (located along the bottom line of the report for each selected month and year)
  - iv. The total number of exceptions (not sorted by exception type) reported in each selected month and year (e.g., 5 exceptions reported in March 2011; located in right-hand column of report for each selected month and year)

**See page 54 for an example of an MSR Exception Type Count Report.**

## MSR Submission Report

To view and/or print an MSR Submission Report:

1. **Click the “MSR Submission Report” button** on the Hospital MSR Reports page of INSTEP.
2. On the “MSR Submission Report” page, **check the boxes of the status(es) you wish to view** on this report.
  - a. INSTEP defaults to include all four statuses (on time, late, missing, and open) on each MSR Submission Report.
  - b. If you do not wish to view one or more of these statuses, uncheck the box next to the status you wish to remove.
3. **Select the year** of the MSR you wish to view and/or print from the drop-down menu labeled “Year.”
4. **Click “Run.”**
5. INSTEP will refresh & display the selected MSR Submission Report in the lower half of the screen.

**MSR Submission Report**

To view Hospital MSR Submission Reports.

Status:  On Time  Late  Missing  Open

Facility: BLOOMINGTON HOSPITAL

Year: 2011

Run Clear

<u>Month</u>	<u>Contact</u>	<u>Created Date</u>	<u>Closed Date</u>	<u>Status</u>
January				Missing
February				Missing

6. To print a hard (paper) copy of the report, scroll to the bottom of the screen and hover your mouse over the report. You should see the Adobe Acrobat toolbar appear.
7. Click on the printer icon to print the report.

• Scroll to the bottom of your screen & hover your mouse over the MSR report. The Adobe Acrobat toolbar will appear.

• Click on the "Print" icon.

Number of home births that received screening	1
Number of walk-ins that received screening	0
Number of exceptions reported	6
Total number of screens	21



Print (Ctrl+P)

Indiana State  
Department of Health

## Example of MSR Submission Report

### MSR SUBMISSION REPORT

Facility :

Year : 2011

<u>Month</u>	<u>Contact</u>	<u>Created Date</u>	<u>Closed Date</u>	<u>Status</u>
January				Missing
February				Missing
March				Missing
April				Missing
May	Bridwell, Tonya	6/9/2011		Open
June	n/a	n/a	n/a	n/a
July	n/a	n/a	n/a	n/a
August	n/a	n/a	n/a	n/a
September	n/a	n/a	n/a	n/a
October	n/a	n/a	n/a	n/a
November	n/a	n/a	n/a	n/a
December	n/a	n/a	n/a	n/a

### STATUS SUMMARY

<u>Status</u>	<u>Total</u>
Submitted	0
On Time	0
Late	0
Unsubmitted	5
Missing	4
Open	1
<b>Total</b>	<b>5</b>

## MSR Monthly Exception Report

To view and/or print an MSR Monthly Exception Report:

1. Click the “MSR Monthly Exception Report” button on the Hospital MSR Reports page of INSTEP.
2. Select the year and month of the MSR you wish to view and/or print from the drop-down menus labeled “Year” and “Month.”
3. Click “Run.”
4. INSTEP will refresh and display the selected MSR Monthly Exception Report in the bottom half of your screen.

- INSTEP will automatically take you to the MSR Monthly Exception Report.

- The MSR you selected will automatically be displayed in the lower half of the screen

The screenshot shows the INSTEP web application interface. At the top, there is a navigation bar with the INSTEP logo and a 'Login' button. Below the navigation bar, there are several menu items: Home, My Cases, Hospital MSR, LTF Forms, My Email, Person Search, and Admin. A 'Previous Pictures' button is also visible. The main content area is titled 'MSR Monthly Exception Report' and includes a 'Return to Hospital MSR Reports page' button. Below the title, there are three dropdown menus for 'Facility', 'Year', and 'Month'. The 'Facility' dropdown is set to 'BLOOMINGTON HOSPITAL', the 'Year' dropdown is set to '2011', and the 'Month' dropdown is set to 'May'. There are 'Run' and 'Clear' buttons below the dropdowns. The report content is displayed in a large box with the following information:

**MSR MONTHLY EXCEPTION REPORT**  
Facility : BLOOMINGTON HOSPITAL  
Year : 2011  
Month : May  
MSR Created By : Alex Litvan  
Opened : 6/9/2011  
Closed :

5. To print a hard (paper) copy of the report, scroll to the bottom of the screen and hover your mouse over the report. You should see the Adobe Acrobat toolbar appear.
6. Click on the printer icon to print the report.

- Scroll to the bottom of your screen & hover your mouse over the MSR report. The Adobe Acrobat toolbar will appear.
- Click on the "Print" icon.

Number of home births that received screening	1
Number of walk-ins that received screening	0
Number of exceptions reported	6
Total number of screens	21



>

Indiana State  
Department of Health



7. To print another MSR Monthly Exception report, change the date fields (month and year) at the top of the MSR Monthly Exception Report screen, then click "Run."
8. Follow steps 5 – 7 above to print additional reports.

## Example of MSR Monthly Exception Report

### MSR MONTHLY EXCEPTION REPORT

Facility :  
Year : 2011  
Month : May  
MSR Created By :  
Opened : 6/9/2011  
Closed :

PID	Name	DOB	Exception Code	MRN
5136338	WORKING, WORK	05/17/2011	Transfer Only	1
5136340	SECOND, TEST	05/02/2011	Transfer Only	2
5136349	HORSE, NELLY	05/24/2011	NICU	123456
5136354	A, B	05/10/2011	NICU	3
5136356	E, F	05/02/2011	Initial Screen Next Month	4
5136358	G, H	05/09/2011	Religious Refusal	5

### SUMMARY DATA

Number of live births	23
Number of home births that received screening	1
Number of walk-ins that received screening	0
Number of exceptions reported	6
Total number of screens	21

## MSR Exception Type Count Report

To view and/or print an MSR Exception Count Type report:

1. Click the “MSR Exception Type Count” button on the Hospital MSR Reports page of INSTEP.
2. **Timeframe of report:** INSTEP allows users to run this report for a single month, for all MSRs submitted by your facility, or for a date range (multiple months). **To run your MSR Exception Type report, select ONE of the options below:**
  - a. **Run this report for a SINGLE MONTH:** Select the year and month of the report you wish to view and/or print from the drop-down menus labeled “Year” and “Month” in the “Search by Year and Month” section.

• To run the MSR Exception Type Report for a single month, select the appropriate year and month from the drop-down menus labeled “Year” and “Month.”

The screenshot shows the INSTEP web application interface. At the top is a navigation bar with the INSTEP logo and links for Home, My Cases, Hospital MSR, LTF Forms, My Email, Person Search, and Admin. Below the navigation bar is a search area with a "Previous Profiles" dropdown. The main content area is titled "MSR Exception Types Report" and includes a "Return to Hospital MSR Reports page" button. The search section is divided into two options: "Search by Year and Month" and "Or Search by Range". Under "Search by Year and Month", there are dropdown menus for "Facility" (labeled "-- Select Facility --"), "Year" (currently showing "2011"), and "Month" (currently showing "May"). There is a "Run" button below these dropdowns. An arrow points from the text above to the "Year" dropdown menu. Under "Or Search by Range", there are dropdown menus for "From" (labeled "-- Select Month --"), "To" (labeled "-- Select Year --"), and another "To" (labeled "-- Select Month --"). There are also "Run" and "Clear" buttons at the bottom of this section.

- b. **Run this report for ALL MSRs SUBMITTED BY YOUR FACILITY:** Select “All” for the year and month from the drop-down menus labeled “Year” and “Month” in the “Search by Year and Month” section.

• To run the MSR Exception Type report for all MSRs submitted by your facility, select “All” within the “Month” and “Year” drop-down menus within the “Search by Year and Month” section.

- c. **Run this report for a DATE RANGE (multiple months):** Select the month and year for the start (“From”) and end (“To”) dates of the date range (e.g., May 2011 through November 2011) in the “Search by Range” section.

• To run the MSR Exception Type report for a date range (such as from May 2011 to November 2011), enter the appropriate month and year for the start (“From”) and end (“To”) dates in the “Search By Range” section.

### 3. Click “Run.”

4. **INSTEP will refresh and display the selected MSR Exception Type Report in the bottom half of your screen.**

**NOTE:** If you ran this report for multiple months, each month will display and print on a separate sheet of paper. Use the scroll bar within the Adobe Acrobat window on the right hand side of the screen to move between multiple pages. This is a different scroll bar than the one you use to scroll up/down within your Internet browser!

• If you ran this report for more than one month, each month's report will display & print on a separate page within Adobe Acrobat.

• Use the scroll bar within Adobe to move from one page to another. **NOTE:** This is a different scroll bar than the scroll bar for your Internet browser!

### MSR Exception Types Report

In: [View Hospital MSR Exception Types Reports](#)

Facility: ADAMS MEMORIAL HOSPITAL

Search by Year and month

Year: All

Month: All

Run

Or Search by Range

From: April 2011 To: May 2011

Run Clear

[Return to Hospital MSR Reports page](#)

### MSR EXCEPTION TYPES REPORT

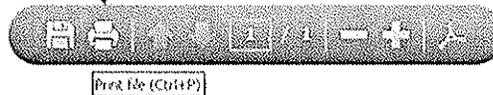
Year : 2011  
Month : March

Facility	Transfer Only	Finally Screened	NICU	Initial Screen Next Month	Deceased	Religious Waiver	Discharged Without NBS	Total
ADAMS MEMORIAL HOSPITAL	0	0	0	0	0	0	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

5. To print a hard (paper) copy of the report, scroll to the bottom of the screen and hover your mouse over the report. You should see the Adobe Acrobat toolbar appear.
6. Click on the printer icon to print the report.

- Scroll to the bottom of your screen & hover your mouse over the MSR report. The Adobe Acrobat toolbar will appear.
- Click on the "Print" icon.

Number of home births that received screening	1
Number of walk-ins that received screening	0
Number of exceptions reported	6
Total number of screens	21



Print (Ctrl+P)

Indiana State Department of Health

## Example of MSR Exception Type Count Report

### MSR EXCEPTION TYPES REPORT

Year : 2011  
Month : March

Facility	Transfer Only	Finally Screened	NICU	Initial Screen Next Month	Deceased	Religious Waiver	Discharged Without NBS	Total
	0	0	0	0	0	0	0	0
Total	0	0	0	0	0	0	0	0

### MSR EXCEPTION TYPES REPORT

Year : 2011  
Month : April

Facility	Transfer Only	Finally Screened	NICU	Initial Screen Next Month	Deceased	Religious Waiver	Discharged Without NBS	Total
	0	0	0	0	0	2	0	2
Total	0	0	0	0	0	2	0	2

## Sending a Secure E-mail through INSTEP

INSTEP has a secure e-mail feature that allows INSTEP users to send and receive messages that contain protected health information (PHI) – or any detailed information about a specific child – safely and securely, without worrying about violating any HIPAA security or privacy rules.

To compose a secure message within INSTEP:

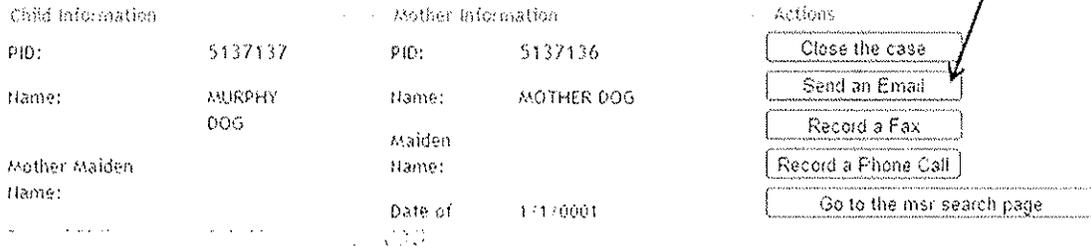
1. Start by accessing the Child Health Information Profile (CHIP) of the specific child about whom you are writing a message. You can access the CHIP by clicking on “Person Search” at the top of your INSTEP screen *or* by clicking the “View the CHIP” link or button on your Exception Entry screen.
2. Click on the “Send an E-mail” button in the upper right corner of the CHIP.

### Child Health Information Profile

*The profile shows collected data and activities performed for a person of interest.*

Click the “Send an Email” button to access INSTEP’s secure e-mail function.

Child Information	Mother Information	Actions
PID: 5137137	PID: 5137136	Close the case
Name: MURPHY DOG	Name: MOTHER DOG	Send an Email
Mother Maiden Name:	Maiden Name:	Record a Fax
	Date of Birth: 1/1/0001	Record a Phone Call
		Go to the msr search page



3. INSTEP will display the Secure E-mail page.
  - a. Select the name of the recipient by clicking on the “To” drop-down menu and picking the person’s name.
  - b. Select the name of another recipient by clicking on the “CC” drop-down menu and picking the person’s name.
  - c. Type the e-mail’s subject in the “Subject” line.
  - d. Type your message in the “Body” text box. **Do not delete any text under the line marked “ISDH USE.”**
  - e. If you wish to add any attachments to your message, use the “Upload a file” feature at the bottom of the screen. *See pages 32 – 34 of this User Guide for step-by-step instructions for uploading files.*
  - f. When you are finished with your message, click “Send.”

**ACTION EMAIL**  
Send an email to a user of the INSTEP application.

1. Select the name of your recipient in the “To” drop-down menu.
2. Select the name of another recipient, if needed, in the “CC” drop-down menu.
3. Enter your subject in the “Subject” line.
4. Type your message in the “Body” text box.

Do NOT delete any information below the “ISDH USE Please Do Not Remove” line.

When finished, click “Send.”

If you wish to upload attachments to this e-mail, use the “Upload a File” feature.

**ATTACHED FILES**

upload a file:  Upload

Files:  
0 file(s) found.

4. INSTEP will send & store your e-mail message securely.
  - a. *Your actual message will stay within INSTEP—no PHI will be released outside of INSTEP.*
  - b. Instead of seeing your actual message (containing the PHI about the child) in his/her e-mail inbox, your recipient(s) will receive notification that a secure e-mail is awaiting them in INSTEP.
  - c. The recipient(s) can click on the link in this message to log into INSTEP and access their “My E-mail” page to see your message.

**ISDH INSTEP Email Notice**

ceddy@isdh.in.gov

This message was sent with High importance.

Sent: Tue 8/16/2011 10:33 AM

To: Eddy, Courtney

Courtney Eddy has sent you a secured email.

To Access your message, simply follow these steps:

1. [Click here](#) to login and view the contents of this secured email.
2. Enter your user name and password when prompted.
3. Access your inbox to view the message.

If your email software does not support the 'Click Here' link above, copy the URL below and paste it into the address bar on your web browser.

<https://gatewaydev.isdh.in.gov/GatewayTst/SignIn.aspx?appid=71&redirectTo=INSTEP.MvEmail.aspx>

5. Your “My E-mail” page in INSTEP will display all e-mail messages you have sent or received through INSTEP.
  - a. For details of an individual message, click the arrow to the left of the message.
  - b. To reply to a message, click the “Reply” link.
  - c. To delete a message in your Received or Sent e-mails, click the “X” icon. You will be asked for confirmation that you wish to delete the message.
  - d. You can also sort your messages by clicking on any of the column headers within the My E-mail page (such as “From,” “Reply Date,” etc.).

**My Email**

Received (1/20/21)

Drag a column header and drop it here to group by that column.

RECEIVED DATE	FROM	SUBJECT	MESSAGE	READ DATE	REPLY DATE
1/14/2021	Ce...@...@instep.org	test	test message	1/14/2021	

Click here to reply to an e-mail you have received in INSTEP.

Reply

Click here to delete an e-mail message.

X

Refresh list

---

Sent (1/20/21)

SENT DATE	TO	SUBJECT	MESSAGE	READ DATE	REPLY DATE
1/14/2021	Ce...@...@instep.org	test	test message	1/14/2021	

Click here to delete an e-mail message.

X

Refresh list

Click this arrow to see details about a specific message.

## **Frequently Asked Questions (FAQs)**

### **Why can't I log into the Gateway?**

You must register for an account within the Gateway before you can log into the Gateway. In order to register for a Gateway account, make sure you've obtained the Gateway security code from Courtney Eddy. For more information about registering for a Gateway account, see pages 4 – 5 of this User Guide.

### **Why don't I see INSTEP as a tab on my Gateway home page?**

You must request and be granted access to INSTEP before you will see an "INSTEP" tab on your Gateway home page. In order to request access to INSTEP, make sure you've obtained the INSTEP access security code from Courtney Eddy (this is different from the Gateway security code). For more information about requesting access to INSTEP, see pages 7 – 8 of this User Guide.

### **How do I add a child to an MSR if I can't find him/her by MRN?**

If you search for a child by medical record number (MRN) and no matches are found within the INSTEP database, you will be automatically sent to the Exception Entry screen, where you will be able to enter demographic information for the child, his/her mother, and his/her primary care provider, as well as the exception information.

If you search for a child by MRN and cannot find the child in the list of potential matches that are found within the INSTEP database, click the "Child Not Listed" button to manually enter the child's information.

For more information about entering demographic information within INSTEP, please see pages 13 – 15 of this User Guide.

### **Why can't I create a new MSR?**

INSTEP will not allow you to open a new MSR if the previous month's MSR has not been completed & submitted. INSTEP works like this so all "hold-overs" are addressed appropriately the next month. See the next FAQ for more info on hold-overs.

### **How do I add an MSR if I only need to enter summary data?**

Users who need to enter an MSR with no exceptions can click on "Summary Entry" in the Hospital MSR menu. On the Summary Entry screen, click the "Add New MSR" button. You will be taken to the "Exception Entry" screen to select the year & month of the MSR you wish to add. Once the new MSR appears on the Exception Entry screen, go back to the Hospital MSR menu and click on "Summary Entry." Select the month of the MSR you added, then enter summary data as usual. See pages 36 – 38 for more information on entering summary data & submitting your MSR.

## Why are children from last month's MSR automatically appearing on my MSR for this month?

These children are "hold-overs" from the previous month. Certain exception codes ("Unauthorized Refusal", "Hospital Error," "NICU," "Initial Screen Next Month," etc.) will require you to **promote**, or update, the child's status on the next month's MSR.

**Example:** If a child was listed with the "NICU" exception code and received his/her NBS the following month, this child can be promoted / updated to "Finally Screened." The child will not appear on the next MSR.

## Should I enter time in 12-hour or 24-hour format?

Please enter times in INSTEP in a 24-hour (military) format (e.g., 11:15 PM = 2315). Be sure that you enter a "leading zero" for all times before 10 AM (e.g., 5:20 AM = 0520). Do not use a colon (e.g., 10:00 AM = 1000).

## What if I don't know the baby's first name?

INSTEP contains a checkbox labeled "Child's first name is unknown." You should **not** enter a child's first name as "Baby," "Baby Boy/Girl," or "Infant." If you don't know the infant's first name, or if the infant does not yet have a first name, please check this box and leave the "First Name" text box blank.

## How should I report a baby if his/her name has changed?

Report the child with his/her **current legal name**.

- If the child's previous last name is the same as the mother's maiden name, report that name in the "Maiden Name" box.
- Do NOT report a child's name as "Smith (Jones)" or "Smith PREV Jones." INSTEP will not be able to match this child's record with his/her birth certificate & NBS lab results!
- Remember that you can always update a child's name in INSTEP **until you close your MSR for the month**. Once an MSR is closed, information can no longer be updated for that child's record.

## How should I assign birth order for twins, triplets, etc.?

Birth order should be matched to the assigned order from the babies' birth facility. If a set of twins is transferred to your facility, infant B (2) at your facility should have been infant B (2) at the birth facility. Incorrect information can lead to duplicated or incorrectly merged records within the ISDH Repository.

## What children should be reported as transfers in/out of my facility?

The new MSR form requires you to tell us about all children who enter or leave your hospital before having an initial newborn screen (NBS). You should report ALL of the following:

- Transferred in to your facility: Every baby who was born at another facility, but comes to your facility ***without having an initial NBS***
- Transferred to another facility: Every baby who leaves your facility ***without having had an initial NBS***

**How should I report a child who was transferred into my facility and received a valid initial NBS before I submitted my MSR?**

- The *transfer code* for this child should be “Transferred into your facility.”
- The *exception code* for this child should be “Finally Screened”
  - NOT “Transfer Only”!
  - Be sure to include the date of NBS!

**If a child was transferred in/out multiple times during the same month, how do I report that?**

List the transfer code for whatever action happened LAST. For example, if a child was transferred out of your facility, back to your facility, and then out to another facility, that child would be reported on your MSR as “Transferred to another facility.”

**What if a child was transferred to a hospital outside Indiana before having a valid initial NBS?**

You should be able to select the facility’s name within INSTEP. If you can’t locate a facility in INSTEP, please contact Courtney Eddy with the hospital’s name and address so we can add it to INSTEP. **NOTE:** *Please contact the facility to obtain the child’s date of NBS & report this information within INSTEP!*

**How should I report NICU babies?**

What happened with this baby?	Your transfer code should be...	Your exception code should be...
Baby transferred to a NICU at another facility	Transferred to another facility	TRANSFER ONLY
Baby transferred to your hospital’s NICU, <u>screened in same calendar month</u>	Transferred to your facility	FINALLY SCREENED (provide NBS date)
Baby transferred to your hospital’s NICU, but <u>did NOT receive NBS in same calendar month</u>	Transferred to your facility	NICU (no date required)  **This child will be a holdover on next month’s MSR**

**Do I need to report babies born at the end of a calendar month as “Initial Screen Next Month” exceptions?**

ONLY if that child has not received NBS by the time you submit your MSR. Children who are born at the end of a calendar month, but receive NBS at the correct time (e.g., on the 2<sup>nd</sup>), are considered **normal** screens and don’t need to be reported.

## How do I tally my exceptions each month?

ANY child that you report as an exception on your MSR counts as an exception, regardless of the transfer or exception codes. This includes any children who are “Transfer Only” exceptions or were promoted to “Finally Screened.” INSTEP will calculate your exceptions and total number of initial screens for you.

We realize that the number of initial screens reported in INSTEP may not match the number of initial screens recorded in your NBS log at your facility. This is okay! ISDH is no longer focusing on matching numbers—our follow-up is focused on ensuring that every child born in Indiana receives a valid and timely initial NBS.

## When Should I Add & Edit Physician Contact Information?

INSTEP gives users the ability to both add & edit physicians’ addresses & phone numbers. However, numerous physicians have multiple office locations. *In order to prevent duplicate listings of physicians within INSTEP, the following guidelines have been set up for users so that you can determine when to use the “Edit” feature and when to use the “Add Address” / “Add Phone Number” features.*

<u>When should I...</u>	<u>Examples</u>
<p>Use the “Edit” feature for addresses / phone numbers</p>	<ul style="list-style-type: none"> <li>• To <i>correct transposed numbers</i> in an address or phone number (e.g., 3175 instead of 3715)</li> <li>• To <i>add a room/suite number</i> to an existing address</li> <li>• To <i>add an extension</i> to an existing phone number</li> <li>• To <i>correct a location</i> if the hospital/clinic moves <i>within the same city</i></li> <li>• To <i>update a street name</i> in an existing address (e.g., Barnhill Drive changing to Riley Hospital Drive)</li> </ul>
<p>Use the “Add New Address” or “Add New Phone Number” feature</p>	<ol style="list-style-type: none"> <li>3. To <i>add a completely new address</i> (different city/town, different hospital affiliation)</li> <li>4. 714 Barnhill Drive (Riley campus) vs. • 123 W. 86<sup>th</sup> Street (St. Vincent campus)</li> <li>5. To <i>add an entirely different phone number</i> (e.g., 317-999-9999 to 812-777-7777)</li> </ol>

***When in doubt, add a new address or phone number!!!*** When you edit an existing address/phone number, INSTEP will update the address/phone number for ALL exceptions and for ALL users. INSTEP users need to remain cognizant of the fact that other INSTEP users may need a different office/clinic address for the same physician.

**Can I print my MSR?**

Yes, you can! See the section “Printing Your MSR” within this User Guide for more information.

**Is INSTEP compatible with Macintosh computers?**

Currently, INSTEP is not fully compatible with Mac computers. Mac users may have reduced functionality of some components of INSTEP.

**What types of files can I upload to INSTEP?**

Currently, INSTEP will accept the following types of files: pdf, tiff, bmp, gif, png, doc, xls, docx, xlsx, xps, jpg, jpeg.

## ISDH Contact Information

<u>Person to Contact</u>	<u>Issue/Question</u>
<p style="text-align: center;"><b>Courtney Eddy</b> <i>INSTEP Director</i> (317) 233 – 9260 (317) 234 – 2995 (fax) <a href="mailto:CEddy@isdh.IN.gov">CEddy@isdh.IN.gov</a></p>	<ul style="list-style-type: none"><li>• Questions about using INSTEP</li><li>• Requesting Gateway/INSTEP security codes</li><li>• Patient-specific questions</li><li>• Questions about NBS follow-up</li><li>• Submitting signed Religious Waiver or other NBS follow-up information <b>via fax (paper copies)</b></li></ul>
<p style="text-align: center;"><b>Ben Klopfer</b> <i>MCH/NBS Software Development Team Lead</i> (317) 233 – 7395 <a href="mailto:BKlopfer@isdh.IN.gov">BKlopfer@isdh.IN.gov</a></p>	<ul style="list-style-type: none"><li>• Technical questions about INSTEP/Gateway</li></ul>