



**New York State Department of Health**  
**Medicaid Perinatal Care Quality Improvement Project**

**Instruction Module 1: Login to the Prenatal Portal and Download Excel Data Entry Forms**

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*Submitting medical record reviews to the NYSDOH is a three-step process,  
with an instruction module for each step of the process.*

- Module 1:** Login to the Prenatal Portal and Download Excel Data Entry Forms
- Module 2:** Complete Excel Data Entry Forms and Send Data to Your Computer Desktop
- Module 3:** Return Excel Data to the Prenatal Portal

**Module 1** provides detailed instruction for creating a Portal Password, downloading your practice medical record review data entry forms, and viewing your practice sample.

**Module 2** provides instruction on using the Excel Data Entry Forms to enter medical record review information, and sending that information to your computer desktop when done (Export Data).

**Module 3** directs users in sending the medical record review data from their computer desktop to the Prenatal Portal (Upload Data), and confirming the submission was successful.



## **Instruction Module 1: Login to the Prenatal Portal and Download Excel Data Entry Forms**

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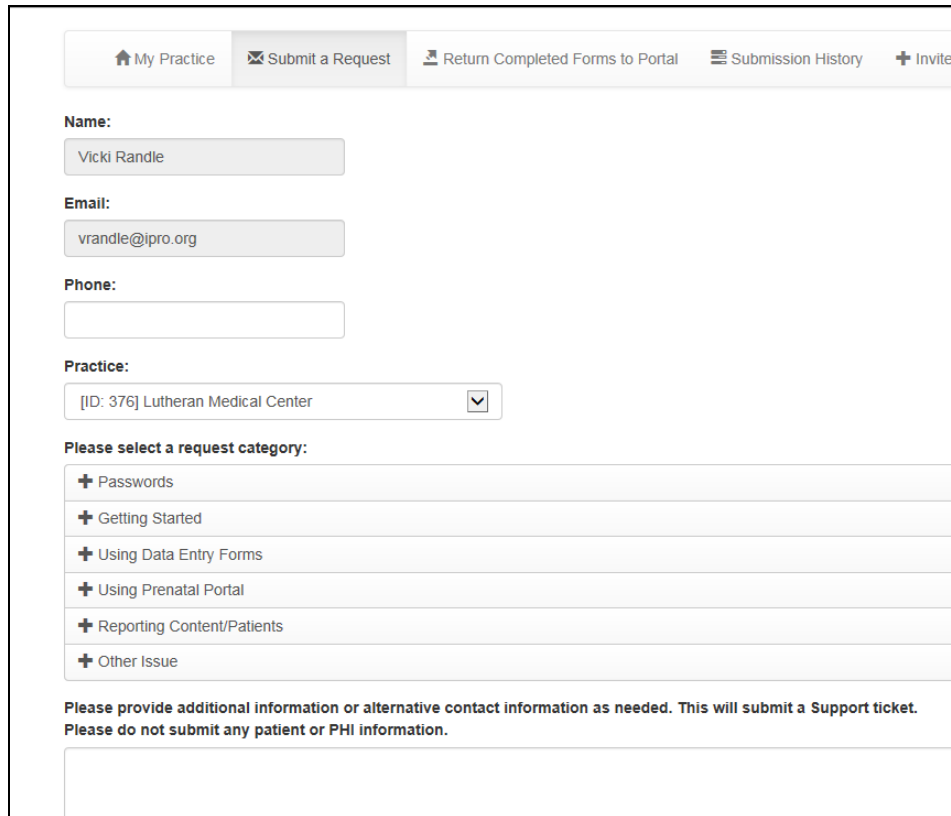
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## Getting Help

*Help is available before logging into the Prenatal Portal.*

1. Go to the Prenatal Portal at <http://prenatal.ipro.org>. You do not have to log in.
2. If you need help, select the Submit a Request tab at the top of the Login page.  
Submit a Request is available from all Portal pages.
3. Select the plus sign (+) next to a request category.  
Select from the Frequently Asked Questions that appear in the expanded menus.  
A text box at the bottom of the page allows entry of additional questions or contact information.
4. Select the Submit button beneath the text box.
5. You will receive an email confirmation your request has been received. IPRO Health Informatics personnel respond to all questions by telephone (if requested) or email within two business days.



The screenshot shows the 'Submit a Request' form in the Prenatal Portal. The form is titled 'Submit a Request' and is located in the top navigation bar. Below the navigation bar, there are several tabs: 'My Practice', 'Submit a Request', 'Return Completed Forms to Portal', 'Submission History', and 'Invite A...'. The 'Submit a Request' tab is selected.

The form contains the following fields and sections:

- Name:** A text input field containing 'Vicki Randle'.
- Email:** A text input field containing 'vrandle@ipro.org'.
- Phone:** An empty text input field.
- Practice:** A dropdown menu showing '[ID: 376] Lutheran Medical Center'.
- Please select a request category:** A list of categories with plus signs next to them:
  - + Passwords
  - + Getting Started
  - + Using Data Entry Forms
  - + Using Prenatal Portal
  - + Reporting Content/Patients
  - + Other Issue
- Please provide additional information or alternative contact information as needed. This will submit a Support ticket. Please do not submit any patient or PHI information.** A large text area for additional information.

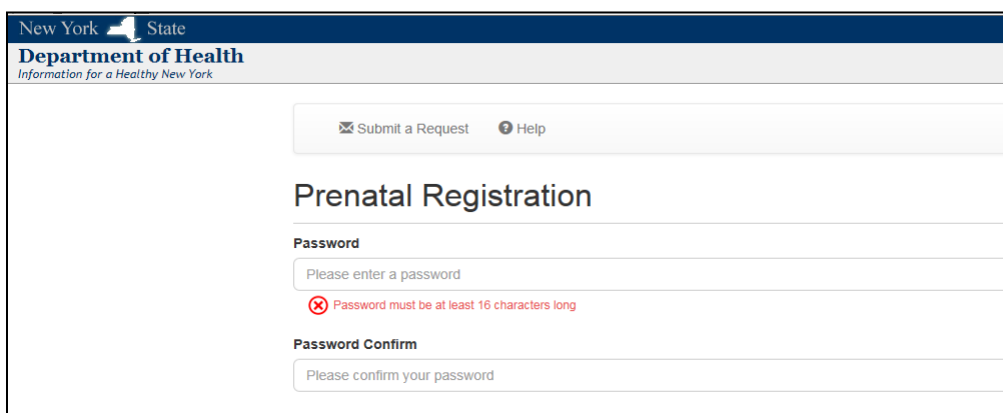
You may also submit a request directly by emailing [prenatal@support.ipro.us](mailto:prenatal@support.ipro.us).

Provide a description of the issue you are experiencing, and the method by which you prefer a response.

## Create a Portal Password

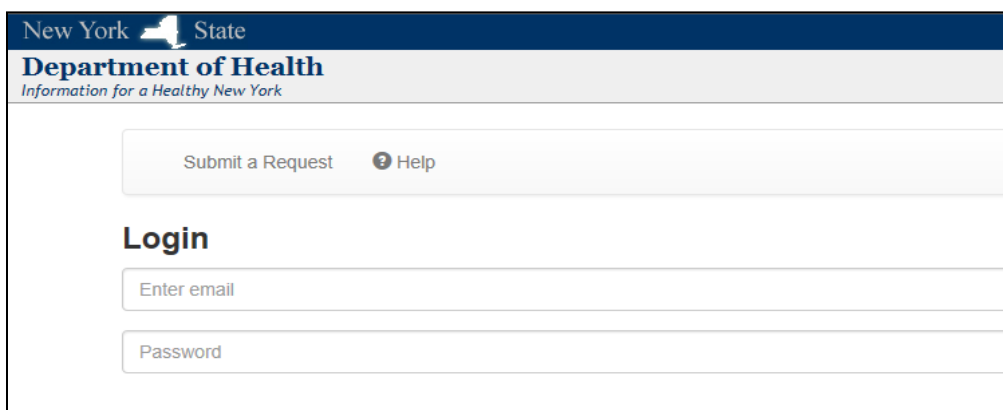
The Primary Contact identified for your practice, and whose contact information was emailed to the IPRO Clinical Project Manager ([vrandle@ipro.org](mailto:vrandle@ipro.org)), will receive an email invitation to access the Prenatal Portal and create a Portal Password.

1. The Primary Contact will receive an email with the Subject Line “Please access the NYSDOH Prenatal Portal upon receipt.”
2. Clicking on the link contained in the email, as instructed, will take the user to the Prenatal Registration page.
3. NOTE: THIS LINK WILL EXPIRE 48 HOURS AFTER THE EMAIL IS SENT. If the link has expired, email [prenatal@support.ipro.us](mailto:prenatal@support.ipro.us) (as described on the previous page) to have the link resent.



The screenshot shows the Prenatal Registration page on the New York State Department of Health website. The page header includes the New York State logo and the text "Department of Health Information for a Healthy New York". Below the header are two buttons: "Submit a Request" and "Help". The main heading is "Prenatal Registration". There are two input fields: "Password" and "Password Confirm". The "Password" field contains the text "Please enter a password" and has a red error message below it: "Password must be at least 16 characters long". The "Password Confirm" field contains the text "Please confirm your password".

4. Create and confirm a password. 16 digits are required – an address or phrase is suggested as an aide to memorize the password.
5. Select the Submit button, advance to the Login page, and Log in.



The screenshot shows the Login page on the New York State Department of Health website. The page header includes the New York State logo and the text "Department of Health Information for a Healthy New York". Below the header are two buttons: "Submit a Request" and "Help". The main heading is "Login". There are two input fields: "Enter email" and "Password".

Passwords are needed only to access the Prenatal Portal.

Passwords are not needed to open the downloaded Excel Data Entry Forms.



### Practice-level Questions

*The first time a user logs in, a set of four practice-level questions are displayed.*

*The user can elect to answer at that time or later, but needs to enter the data only once.*

To close the Practice-level Questions screen, and advance to the My Practice page containing the Excel file of patient-specific data entry forms, select 1 of 2 options:

1. Answer each question and select Save.

If you later want to change your answers, Submit a Request to have the page reset.

2. If you would like to answer the questions later, select Not Now.

The questions will be displayed again at each user log in until answered and saved.

Selecting a blue information icon ⓘ displays a full description of the related field and values.

Prior to entering individual-level data, please answer four practice-specific questions. These questions will not be repeated as you complete the patient medical record reviews.

#### Oleg's Test Practice

**Practice Type** ⓘ

- Federally Qualified Health Center ⓘ
- Perinatal Regional Referral Center ⓘ
- Hospital Clinic ⓘ
- Independent Practice ⓘ
- Other ⓘ

**Are clinicians in the practice familiar with the 2009 (updated March 2015) NYSDOH Medicaid Prenatal Care Standards? The Standards are available at [www.health.ny.gov/health\\_care/medicaid/standards/prenatal\\_care/](http://www.health.ny.gov/health_care/medicaid/standards/prenatal_care/)** ⓘ

**Case Management Criteria** ⓘ

**Check all practice triggers for patient referral to Health Plan High-Risk OB Case Management.**

- Assistance scheduling multiple appointments ⓘ
- Follow up for missed appointments ⓘ
- Tobacco cessation services ⓘ
- Alcohol or drug abuse services ⓘ
- Facilitation of referrals ⓘ
- Facilitation of 17 alpha hydroxyprogesterone treatment ⓘ
- Transportation ⓘ
- Home visitation ⓘ
- Practice does not refer patients to Health Plan Case Management ⓘ

**Vaccine Administration. Does the prenatal practice administer vaccinations?** ⓘ

## Download Data Entry Forms

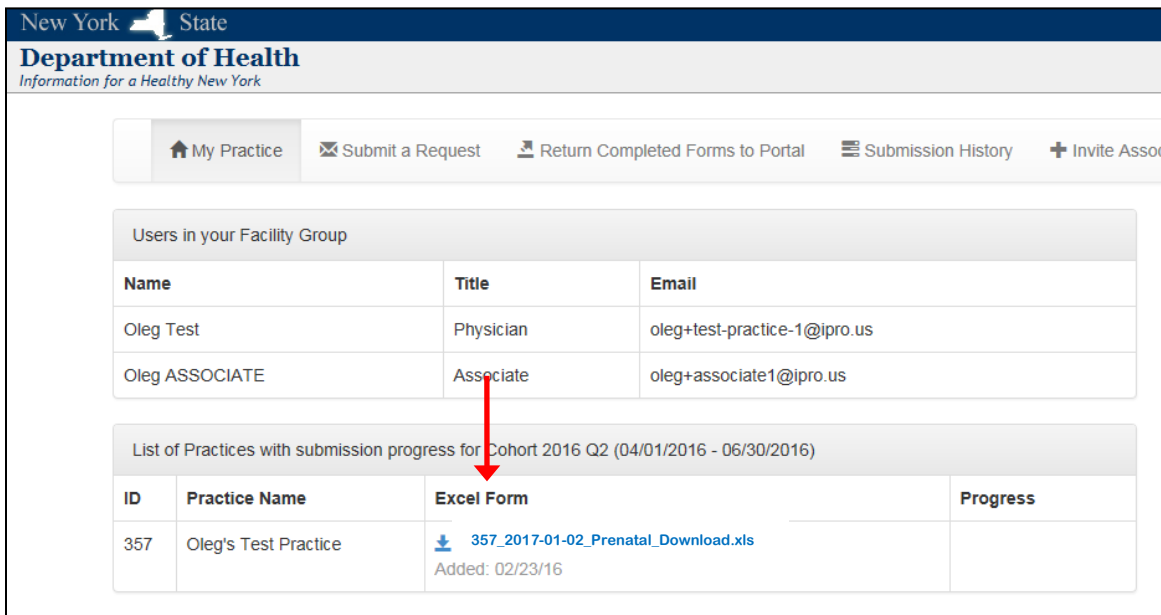
*Medical record review results will be entered in data entry forms pre-populated with your patient sample.*

*The forms reside in an Excel file on the Prenatal Portal, and are accessible only by your practice.*

*The file must be downloaded to your computer to see your patient list and enter data.*

To download the Excel data entry forms:

1. Go to the My Practice page.
2. Locate the heading Excel Form.
3. Locate the file with the naming convention ID\_Date\_Prenatal\_Download.
4. Click on the file name.



The screenshot shows the Prenatal Portal interface. At the top, there is a navigation bar with 'New York State Department of Health' and 'Information for a Healthy New York'. Below this is a menu with 'My Practice', 'Submit a Request', 'Return Completed Forms to Portal', 'Submission History', and 'Invite Assoc'. The main content area is divided into two sections. The first section is titled 'Users in your Facility Group' and contains a table with columns 'Name', 'Title', and 'Email'. The second section is titled 'List of Practices with submission progress for Cohort 2016 Q2 (04/01/2016 - 06/30/2016)' and contains a table with columns 'ID', 'Practice Name', 'Excel Form', and 'Progress'. A red arrow points to the 'Excel Form' column in the second table, specifically to the file name '357\_2017-01-02\_Prenatal\_Download.xls'.

Name	Title	Email
Oleg Test	Physician	oleg+test-practice-1@ipro.us
Oleg ASSOCIATE	Associate	oleg+associate1@ipro.us

ID	Practice Name	Excel Form	Progress
357	Oleg's Test Practice	<a href="#">357_2017-01-02_Prenatal_Download.xls</a> Added: 02/23/16	

5. If you use Internet Explorer, a message bar will appear at the bottom of the page.
6. Click on the down arrow next to the Save command and select Save and Open.
7. The file can be found in on your computer in the default folder for downloads created by your IT personnel. Most often this is the Downloads folder.



The screenshot shows a Windows message bar at the bottom of the page. It contains the text 'Do you want to open or save 357\_2017-01-02\_Prenatal\_Download.xls from prenatal.ipro.org?'. To the right of the text are four buttons: 'Open', 'Save', a dropdown arrow, and 'Cancel'. A red arrow points to the dropdown arrow button.

Web browsers other than Internet Explorer often default to the folders Downloads or Desktop, or allow you to choose the Save destination. If you are using another web browser and require assistance, please Submit a Request.



### View and Verify Patient Sample

*With the Excel file open, you will be able to see the patients attributed to your practice from NYSDOH prenatal care and delivery billing data.*

1. 15 patients (from smaller practices) or 25 patients (from larger practices) will be listed on the Excel file front page.
2. Verify 10 of the 15 patients (smaller practices) or 20 of the 25 patients (larger practices) listed were seen by your practice for primary prenatal care associated with a 2014 delivery. (Tip: If a patient delivered more than once in 2014, see the Infant DOB on the open Data Entry Form).
3. The additional 5 patients are listed as an oversample – to be selected from in the event other patients were not seen by your practice for primary prenatal care (for example, seen for ultrasound only).
4. If fewer than 10 patients (smaller practices) or 20 patients (larger practices) from the total list were seen by your practice for primary prenatal care, please Submit a Request and ask the IPRO Clinical Project Manager to contact you to discuss the attribution. An additional, or second, practice sample will be placed on the Prenatal Portal.

**Medicaid Perinatal Care Quality Improvement Project**  
**Patient Sample**  
 Provider: LUTHERAN MEDICAL CENTER

Print Patient List    Send Completed Forms to Desktop

Patient Name	Date of Birth	Medicaid ID	Date Added	Status	Enter Data	Print Preview	Date Updated	Percent Data Complete
A L	1981-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	<a href="#">Enter Data</a>	<a href="#">Print Preview</a>		0.00%
M H	1973-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	<a href="#">Enter Data</a>	<a href="#">Print Preview</a>		0.00%
M Z	1986-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	<a href="#">Enter Data</a>	<a href="#">Print Preview</a>		0.00%
M S	1977-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	<a href="#">Enter Data</a>	<a href="#">Print Preview</a>		0.00%
J S	1980-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	<a href="#">Enter Data</a>	<a href="#">Print Preview</a>		0.00%
H S	1991-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	<a href="#">Enter Data</a>	<a href="#">Print Preview</a>		0.00%
R A	1968-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	<a href="#">Enter Data</a>	<a href="#">Print Preview</a>		0.00%
T R	1988-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	<a href="#">Enter Data</a>	<a href="#">Print Preview</a>		0.00%

After Enabling Macros (see Open Data Entry Forms on next page), you can select Print Patient List if you wish to print the list to look up patients, retrieve medical records, or assign reviews.

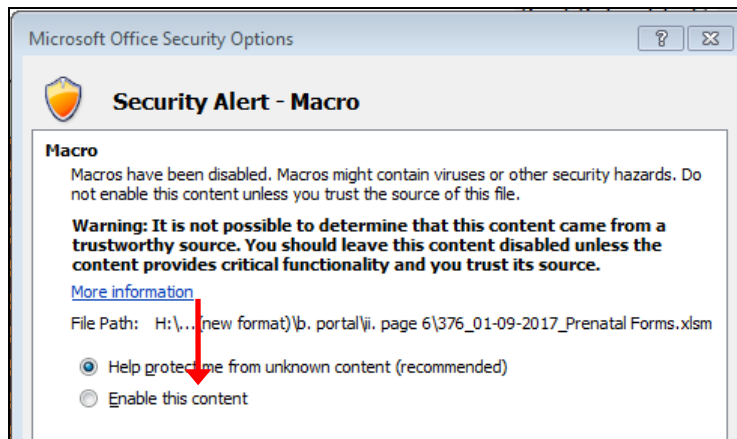
## Open Data Entry Forms

**Every time you open the Excel file, you must Enable Macros.**

1. Click on Options at the top left of the Excel file front page. A dialog box will open.



2. In the dialog box, select Enable this content and click OK.



3. Open a form by selecting Enter Data on a row with a patient name.

Medicaid Perinatal Care Quality Improvement Project					
Patient Sample					
Provider: LUTHERAN MEDICAL CENTER					
Patient Name	Date of Birth	Medicaid ID	Date Added	Status	Enter Data
A L	1981-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	<a href="#">Enter Data</a>
M H	1973-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	<a href="#">Enter Data</a>
M Z	1986-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	<a href="#">Enter Data</a>
M S	1977-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	<a href="#">Enter Data</a>
J S	1980-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	<a href="#">Enter Data</a>
H S	1991-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	<a href="#">Enter Data</a>
R A	1968-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	<a href="#">Enter Data</a>
T R	1988-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	<a href="#">Enter Data</a>

For guidance on navigating and completing the Data Entry Forms, see Module 2: Complete Excel Data Entry Forms and Send Data to Your Computer Desktop.



## Additional Features

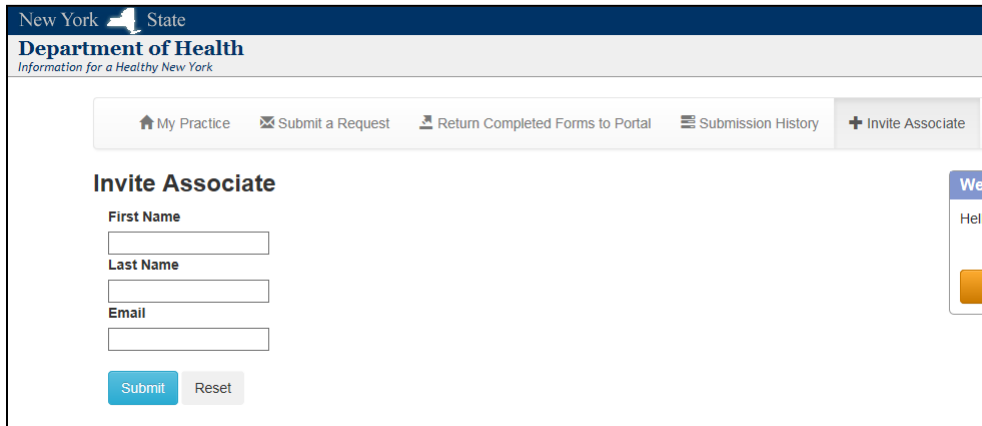
### Invite Associates to use the Prenatal Portal

Multiple reviewers in a practice may:

- Download a copy of the Excel Data Entry Forms.
- Return data for any number of completed forms to the Prenatal Portal.

*The practice Primary Contact can grant additional reviewers access to the Prenatal Portal:*

1. Select the tab Invite Associates.
2. Enter the Associate's name and email address and select Submit.
3. The Associate will receive an email invitation to create a password and log in.



The screenshot shows the 'Invite Associate' form within the New York State Department of Health Prenatal Portal. The header includes the New York State logo and the text 'Department of Health Information for a Healthy New York'. A navigation bar contains links for 'My Practice', 'Submit a Request', 'Return Completed Forms to Portal', 'Submission History', and 'Invite Associate'. The main form area is titled 'Invite Associate' and contains three input fields: 'First Name', 'Last Name', and 'Email'. Below these fields are 'Submit' and 'Reset' buttons. A partial 'Welcome' message is visible on the right side of the screen.