ILLINOIS DEPARTMENT OF PUBLIC HEALTH
IDPH
PROTECTING HEALTH, IMPROVING LIVES

Illinois Disease Surveillance System (IDSS)
Provider Portal Training (July 2024)

Training Agenda

Objectives

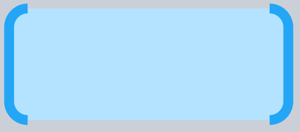
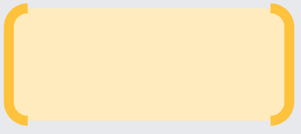
By the end of this session, participants will be more familiar with the IDSS Provider Portal. Participants will be equipped with knowledge of how to access the provider portal, navigate the portal, and enter a new provider report.

Agenda

Topic	Time
Understanding IDSS	10 minutes
Accessing the IDSS Provider Portal	10 minutes
Navigating the Provider Portal	5 minutes
Manual Intake Process	35 minutes
Reviewing Disease Reports	10 minutes

Icon Guide

The following icons are used throughout this training to highlight specific information.

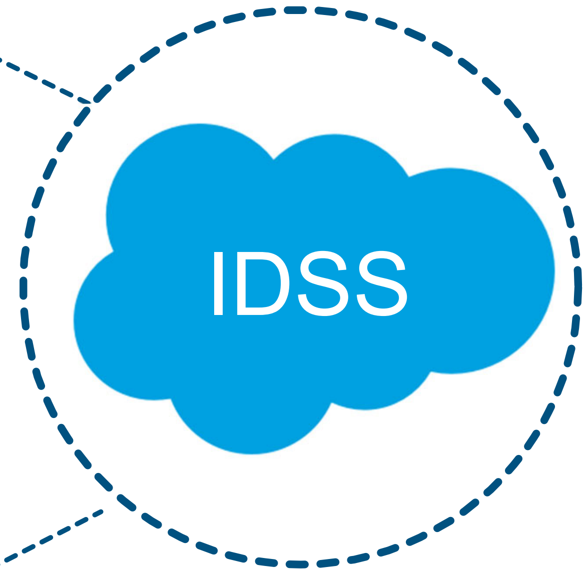
ICON	DESCRIPTION
	Additional information about a screenshot slide.
	Instructions for how to complete a process.
	The order in which the process occurs.

Understanding IDSS

What is the Illinois Disease Surveillance System (IDSS)?

The Illinois Disease Surveillance System (IDSS) is a Salesforce (web-based) system built for local and state health department staff and health care providers to report and monitor communicable diseases within the state of Illinois. IDSS was designed to assist the Illinois Department of Public Health's (IDPH) and its stakeholder's ability to:

- Monitor and manage communicable diseases as they are reported by enabling **more complete and integrated data collection**.
- Track tasks and manage workloads via **automated processes and dashboards for Local Health Departments (LHDs) and IDPH**.
- Adapt and adjust to allow **surveillance and investigation** of emerging diseases for future needs.
- Track cases associated with outbreaks through **greater outbreak functionality** directly in the system.



When will providers be able to access IDSS?

The system will be implemented in two separate releases in 2024. Below provides a timeline for system implementation and when certain diseases will be implemented into IDSS.

IDSS Release 1: STI & TB

July 15, 2024

*For **Release 1, STIs and TB**, including chlamydia, gonorrhea, syphilis, congenital syphilis, Mpox, and tuberculosis, will be implemented into IDSS.*

IDSS Release 2: All Other Diseases

Fall 2024

*For **Release 2, all other diseases** will be implemented into IDSS.*

Providers who report in the provider portal for multiple disease types will be accessing two systems until complete system implementation in Fall 2024. Beginning July 15, providers should use IDSS for STIs and TB, while continuing to use I-NEDSS to input all other diseases until Release 2.

What are some key features for providers in IDSS?

There are several IDSS key features, including user-friendly design, streamlined reporting, ability to update reports, and cross-organization visibility into lab results, relevant for providers.

1

User-Friendly Design

A user-friendly design makes it easy to log in, complete, and submit information to the local health department.

2

Streamlined Reporting

Data collection will be centralized, with providers continuing to report cases in a timely way and providing additional follow up information, such as treatments, when available.

3

Ability to Update Reports

Providers will have the ability to update provider reports with additional information once all mandatory information is completed. Providers can return and add follow-up data like treatments later.

4

Cross-Organization Visibility

Providers can see provider reports they and anyone in their organization submitted.

Providers cannot save reports until full person, disease report, and lab results (if applicable) are input into the system. Once a preliminary provider report is saved, it is immediately accessible to LHDs.

Accessing the IDSS Provider Portal

Getting Started

Providers will be utilizing this new Provider Portal to send disease report information to the Local Health Department. Current providers will already have their login information to log into the IDSS Provider Portal. New providers will need to request access to the IDSS Provider Portal.

Current Providers

- Providers will be uploaded to the IDSS Provider Portal as a user.*
- Providers will automatically be able to access the system via Okta.
- Providers will be given login information.
- There will be no training environment for the Provider Portal

New Providers

- Providers will need to navigate to the IDPH portal to request access.
  - https://portalhome.dph.illinois.gov
- Select **Register for a Portal Account**.
- Complete the form and submit.
- A response will be given soon with login information.

**Providers who have logged into I-NEDSS between December 2022 and April 2024 have been automatically uploaded as users into the new system.*

Logging In to the Provider Portal (1 of 2)

Let's review the process for logging into the IDSS Provider Portal. We'll start by navigating to the partner website and logging in using our Work email address and password.

1. Enter the website in a browser: https://ilpartner.Illinois.gov/
2. Enter Work email address and password.
3. Select your multifactor authentication (MFA) choice as a phone number. Choose to receive a code by SMS or phone call.
4. After completing the MFA, the Okta dashboard will appear. Select the **IDSS Provider Portal** icon.

*Please make sure you are using the **latest version of Google Chrome** to access the Provider Portal to maximize system performance.*

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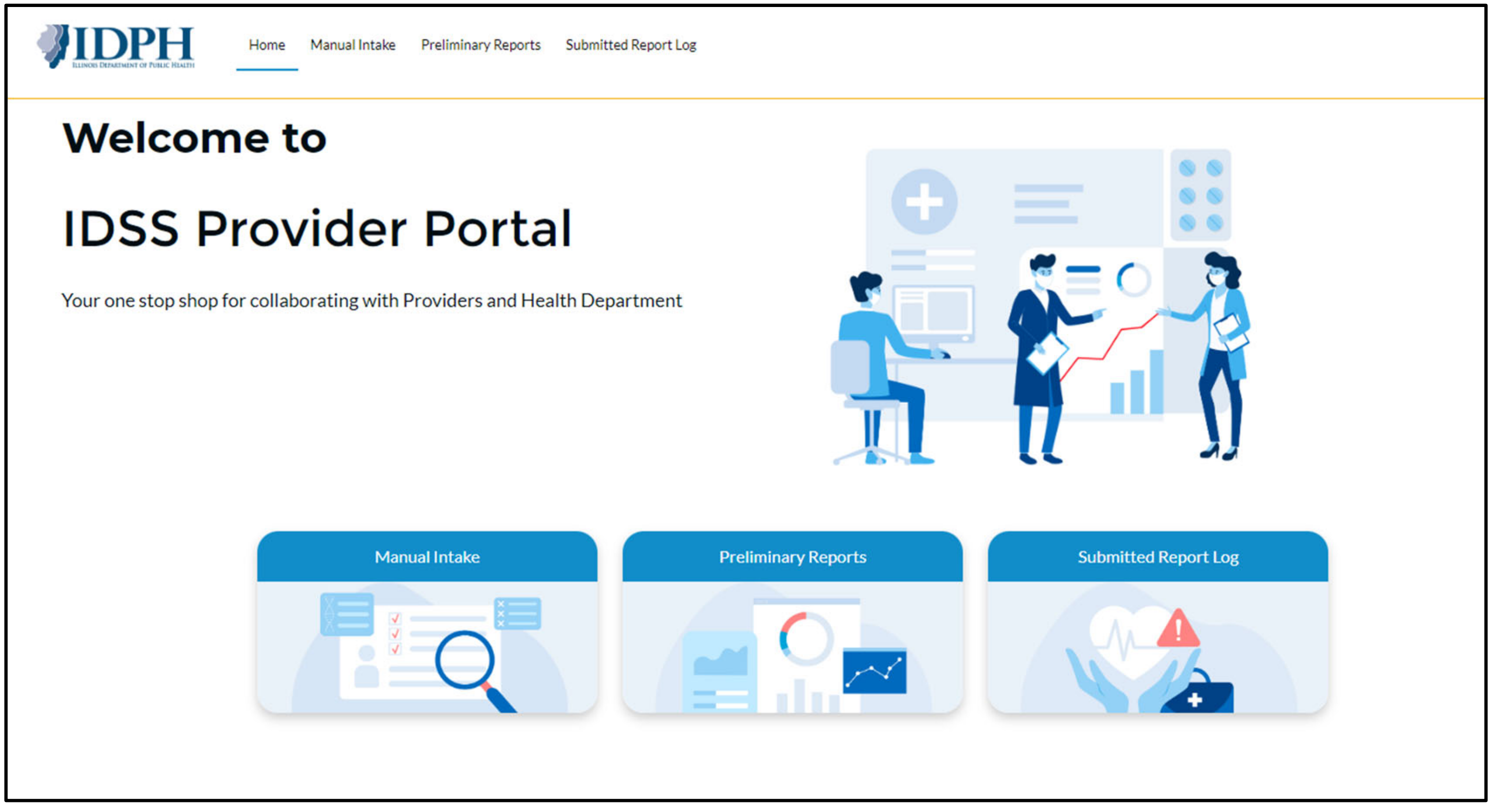
Logging In to the Provider Portal (2 of 2)

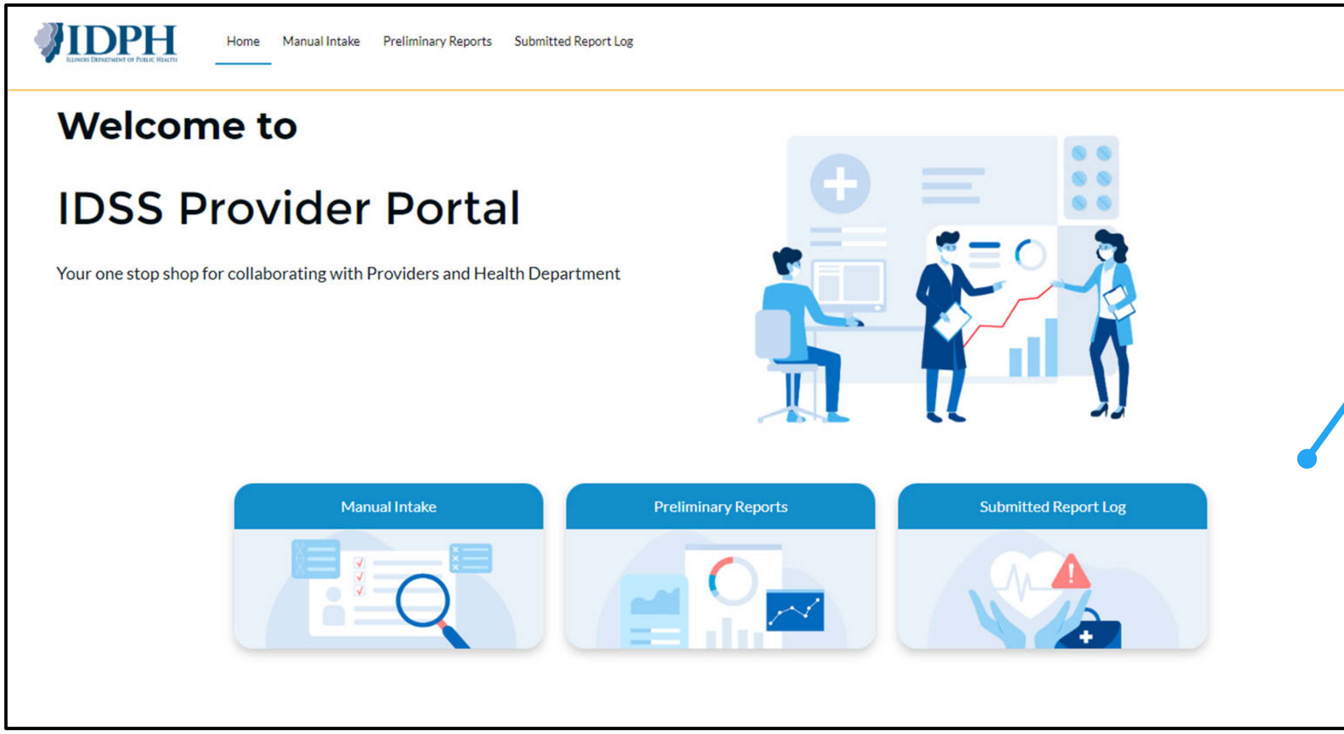
Once logged into Okta, providers will select the **IDSS Provider Portal** icon. The Homepage will be seen by providers after the icon is selected.



Navigating the Provider Portal

What will the system look like? - Provider Portal Homepage

The Homepage in the Provider Portal offers quick access for providers to enter manual reports (e.g., STIs and TB lab reports for Release 1), provide updated information to saved Preliminary reports, and view submitted Preliminary reports.

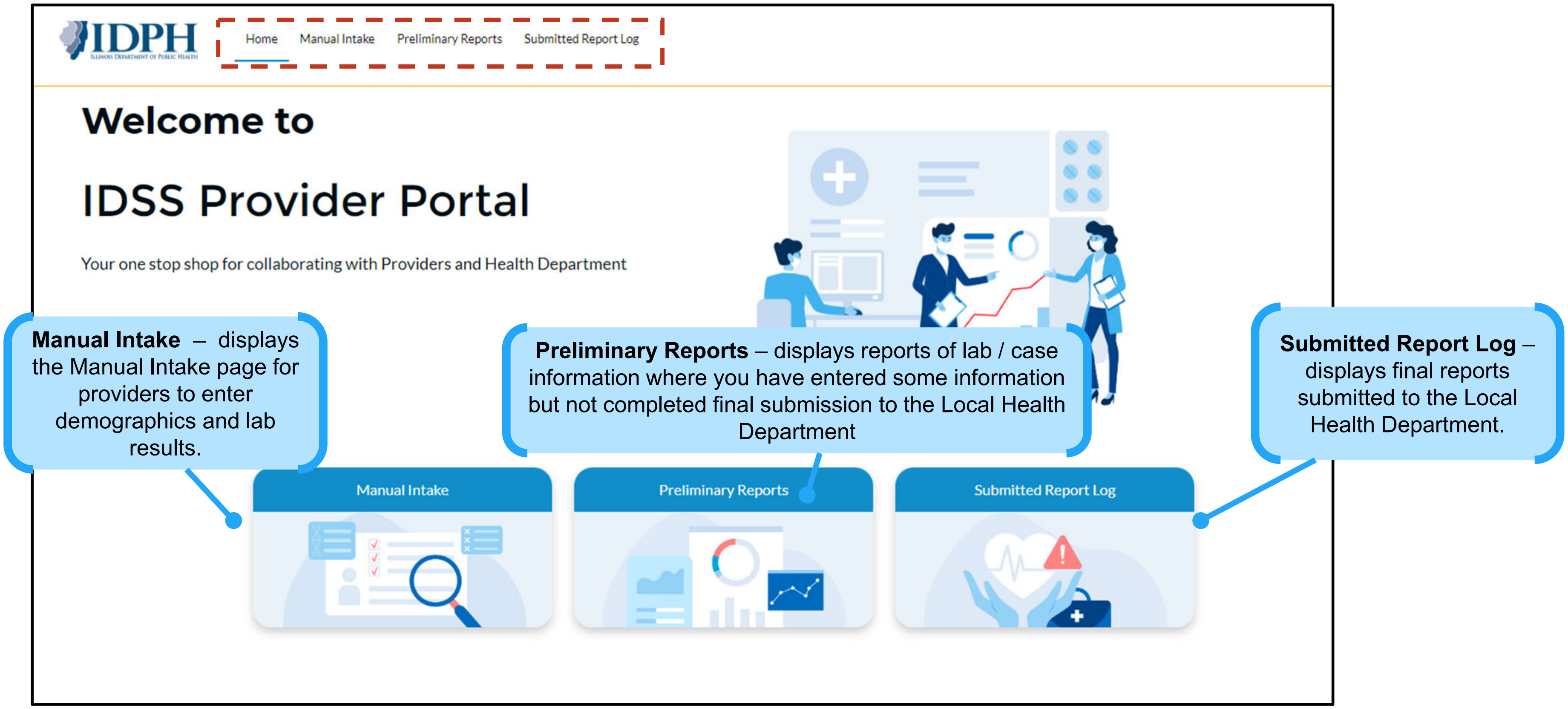


The Provider Portal Homepage contains the following main sections:

- *Manual Intake*
- *Preliminary Reports*
- *Submitted Report Log*

Navigating the Provider Portal Homepage

The Homepage is the first page providers will see once logged into the system. This page enables quick access to the primary disease surveillance functions that providers will use within IDSS, including Manual Intake, Preliminary Reports, and Submitted Report Logs.



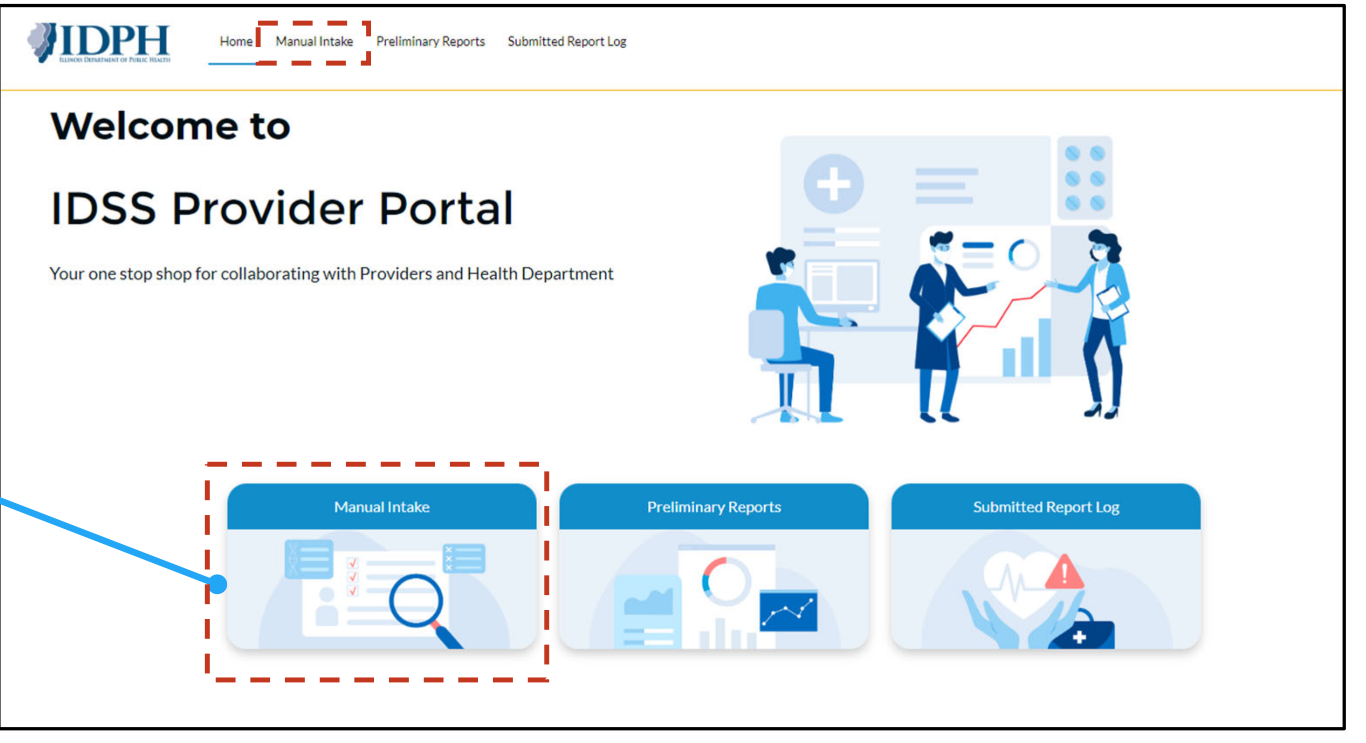
Manual Intake Process

Overview: Manual Intake Process

Entering information for a Provider Report in the Provider Portal is completed through the **Manual Intake** function. During this process, providers will be able to enter demographic information, input lab results, and complete a questionnaire that provides disease-specific information to LHDs. Providers can begin this process by selecting the **Manual Intake** at the top of the page or at the bottom.

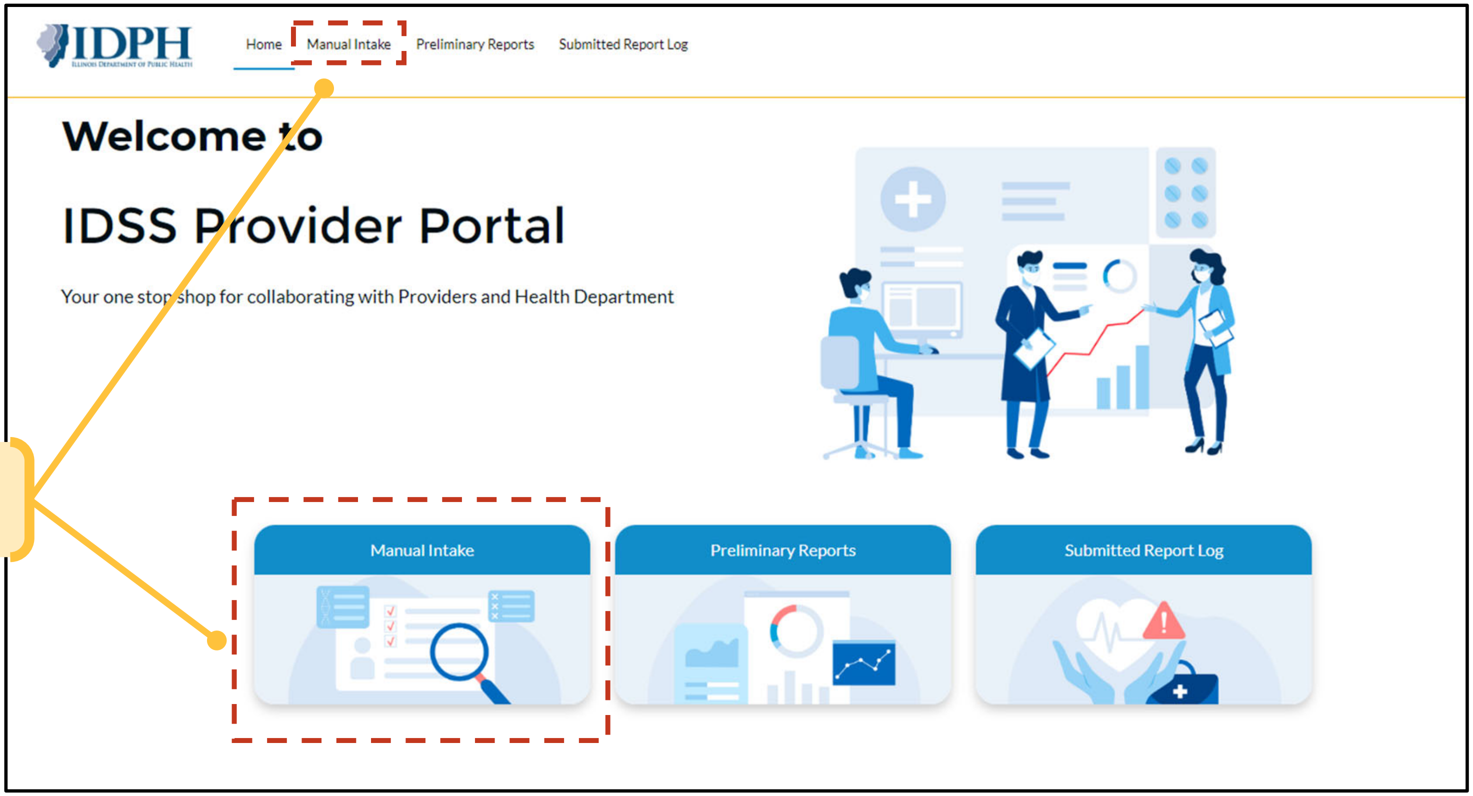
In the **Manual Intake** process, providers complete the following:

- Provide demographic information
- Enter lab results
- Complete a questionnaire with disease-specific information (e.g., questions specific to syphilis)



Manual Intake Process

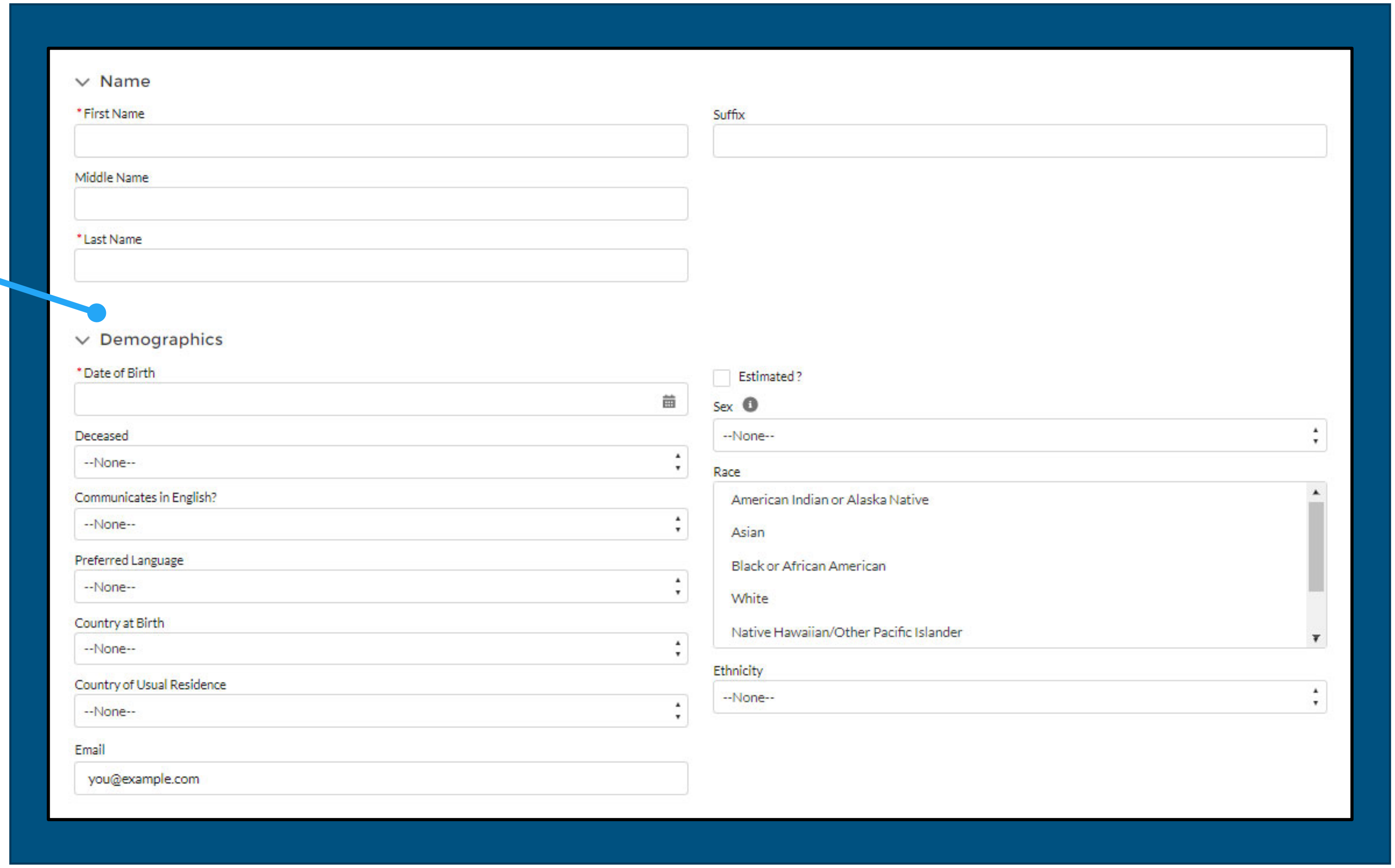
From the Homepage, providers will select the **Manual Intake** option to start the process of entering information for a new case. Let's look at each page of the Manual Intake process.



Select **Manual Intake**.

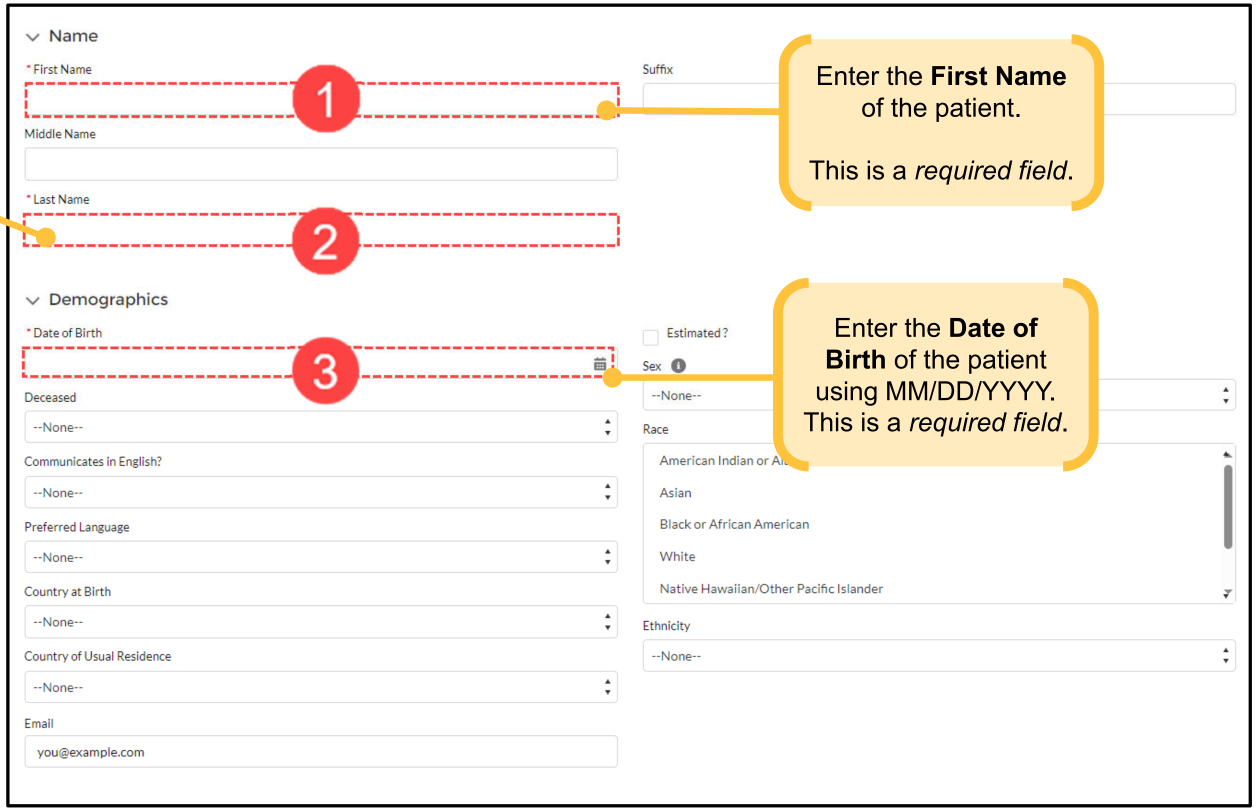
Manual Intake Process: Name and Demographics Overview

The first part of the Manual Intake process is where providers enter the **name of the patient, demographics, address information, phone information, and the disease**. Each section will be described throughout the following slides.



Manual Intake Process: Name and Demographics (1 of 3)

The first two sections of the Manual Intake process is completing the **Name** and **Demographics** sections. Providers will need to complete the required fields and any other fields from gathered information.



Enter the **Last Name** of the patient.

This is a *required field*.

Enter the **First Name** of the patient.

This is a *required field*.

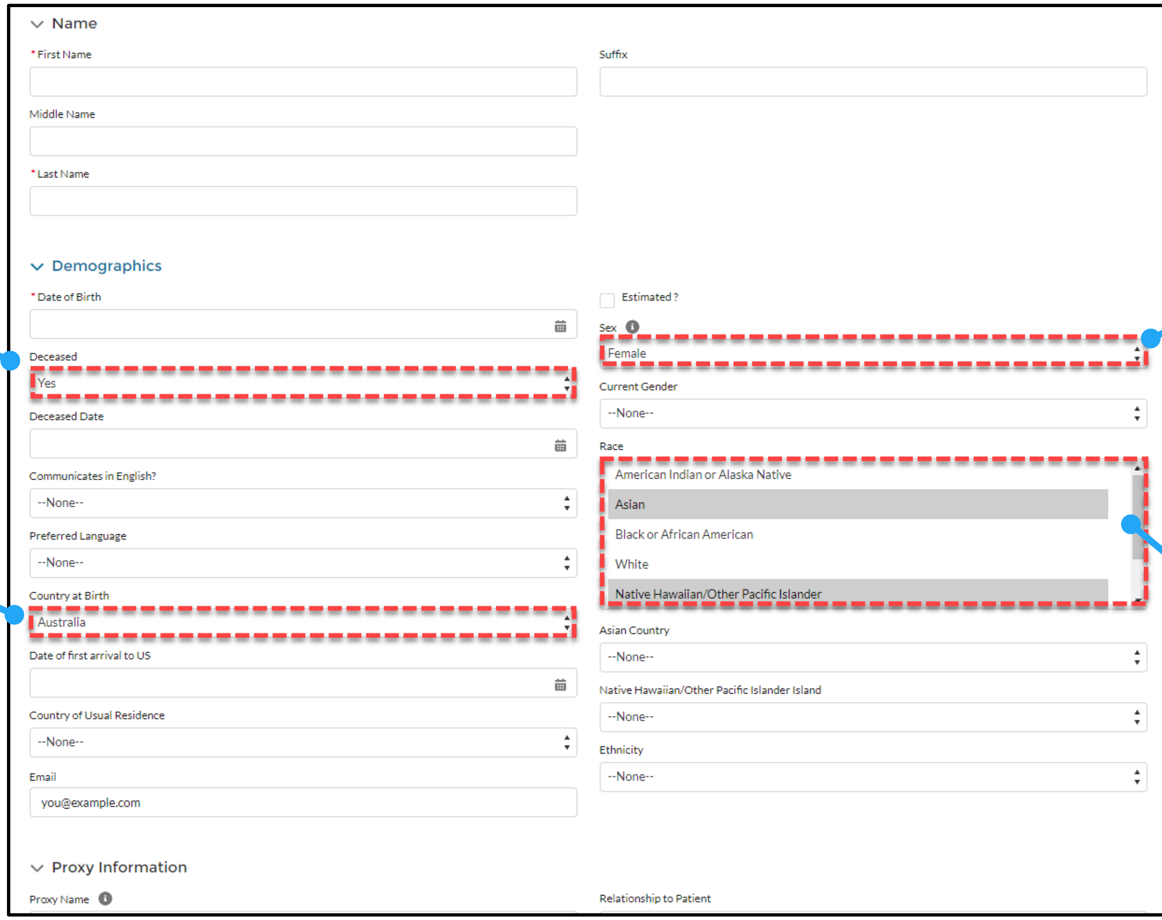
Enter the **Date of Birth** of the patient using MM/DD/YYYY. This is a *required field*.

Manual Intake Process: Name and Demographics (2 of 3)

Selecting a certain option in the following fields will auto display an additional field for completion: Deceased, Sex, Country at Birth, and Race.

Selecting the **Yes** option for **Deceased** will auto display the **Deceased Date** field below.

Selecting a non-US option for **Country at Birth** will auto display the **Date of first arrival to US** field below.

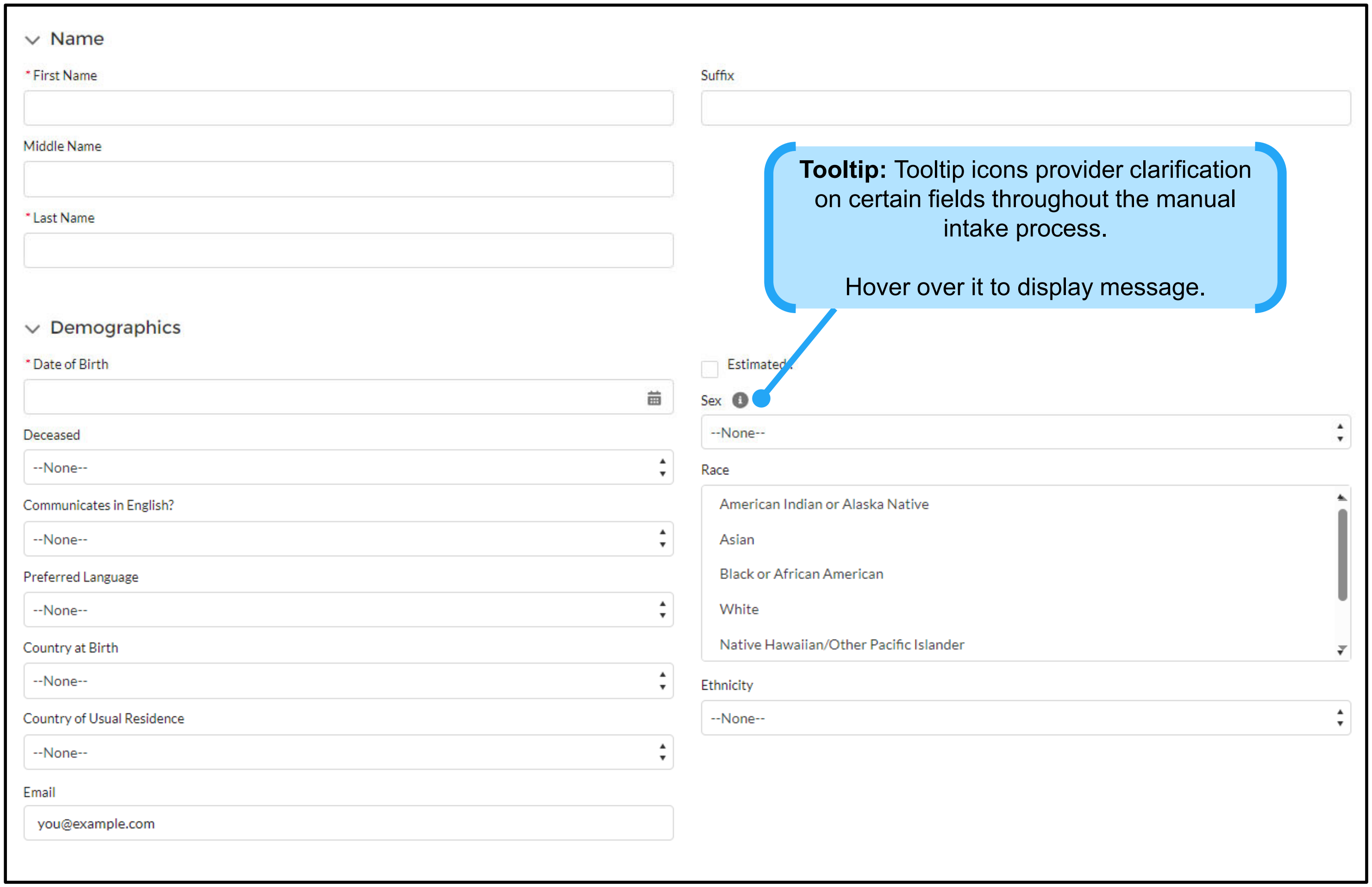


Selecting an option from the **Sex** field will auto display the **Current Gender** field below.

Selecting an **Asian** or **Native Hawaiian/Other Pacific Islander** will auto display **Asian Country** or **Native Hawaiian/Other Pacific Islander Island** fields below.

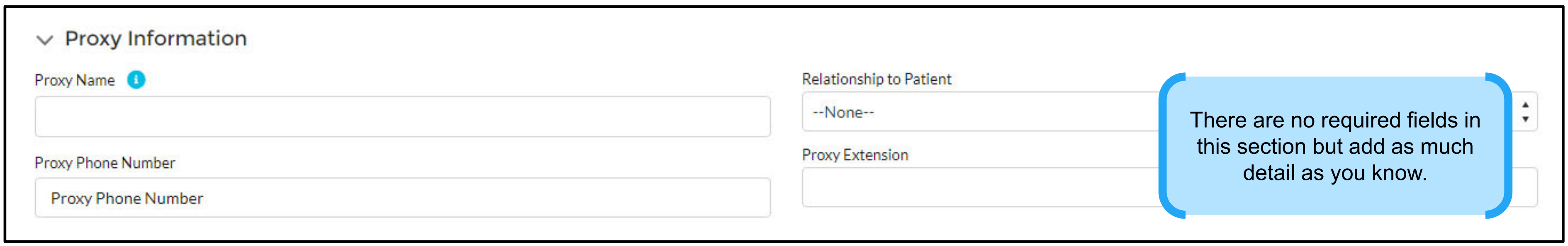
Manual Intake Process: Name and Demographics (3 of 3)

Hovering over a tooltip icon will display clarification about a field. This icon will be seen throughout the manual intake process.



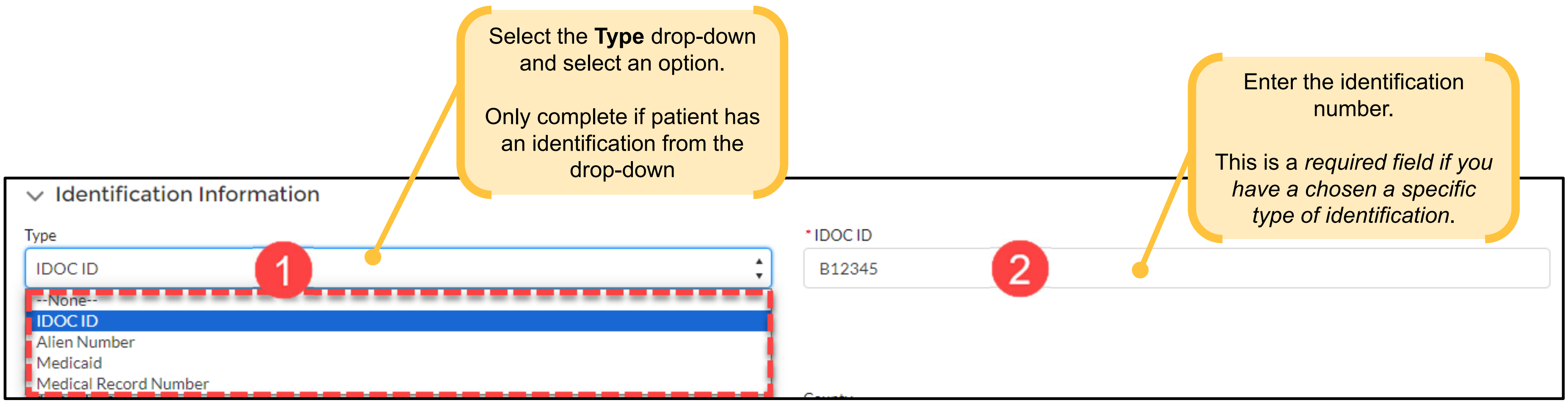
Manual Intake Process: Proxy Information

The next section is the **Proxy Information** section. This section is for entering information about a person who has permission to answer medical questions about the patient including a guardian, relative, spouse, next of kin, or partner. Only one individual can be listed in this section per patient record.



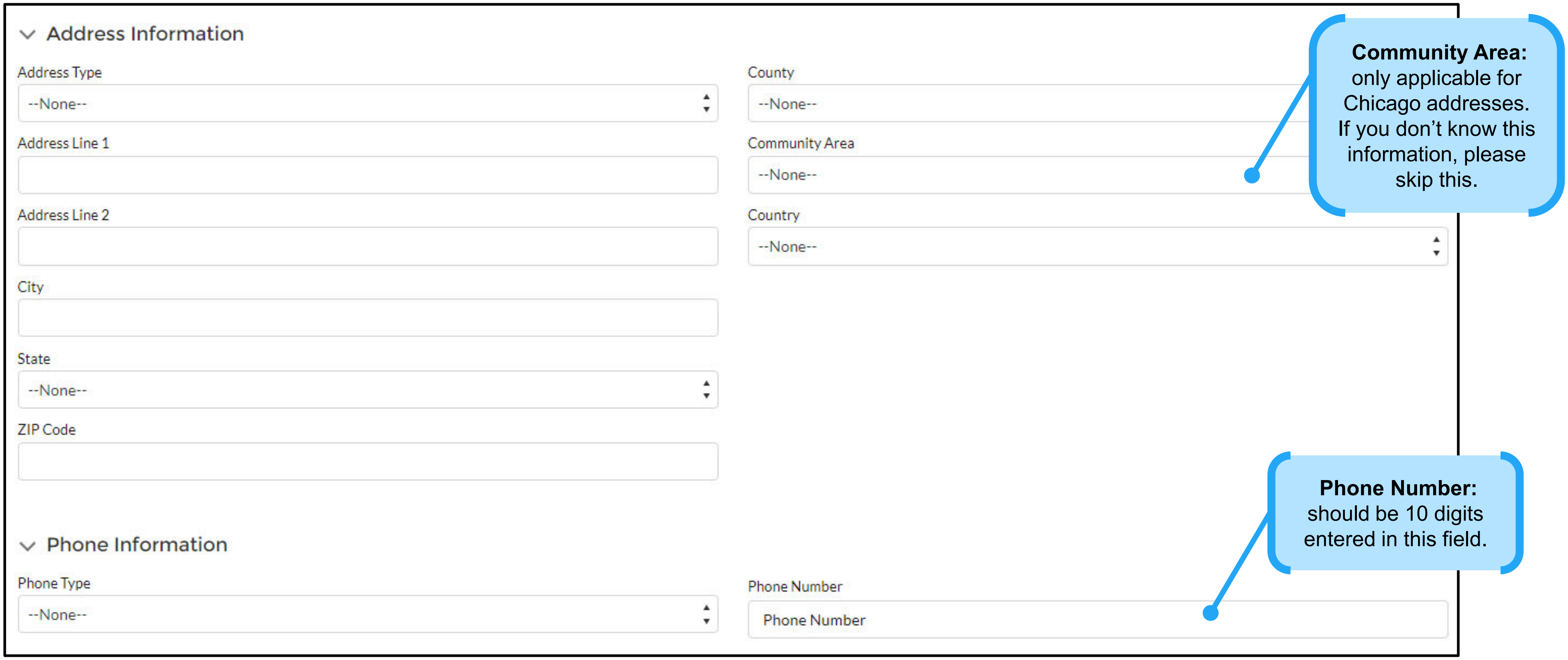
Manual Intake Process: Identification Information

The next section is the **Identification Information** section. This section is used to verify the identity of the patient. This section is not required unless the individual has a particular identification that is listed. Only one identification can be listed in this section.



Manual Intake Process: Address Information and Phone Information

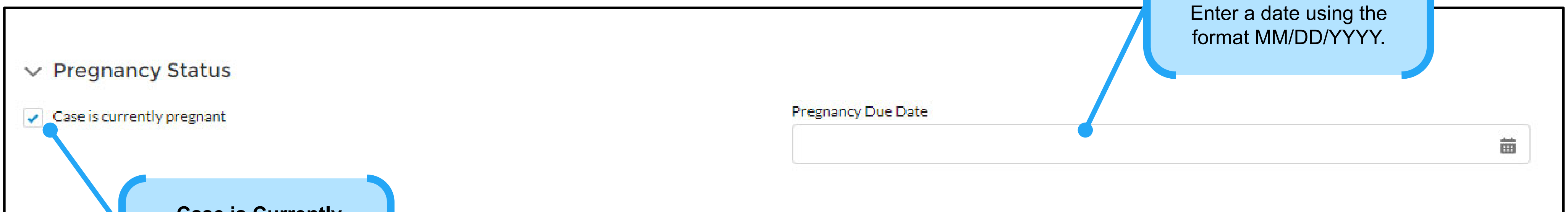
The next two sections are the **Address Information** and **Phone Information** sections. Only one address and phone number can be entered into these sections.



Manual Intake Process: Pregnancy Status

The **Pregnancy Status** section will only be available if Female or Nonbinary/X is selected in the Sex field in the Demographics section.

Pregnancy Due Date: field will display once the pregnancy box is selected. Enter a date using the format MM/DD/YYYY.



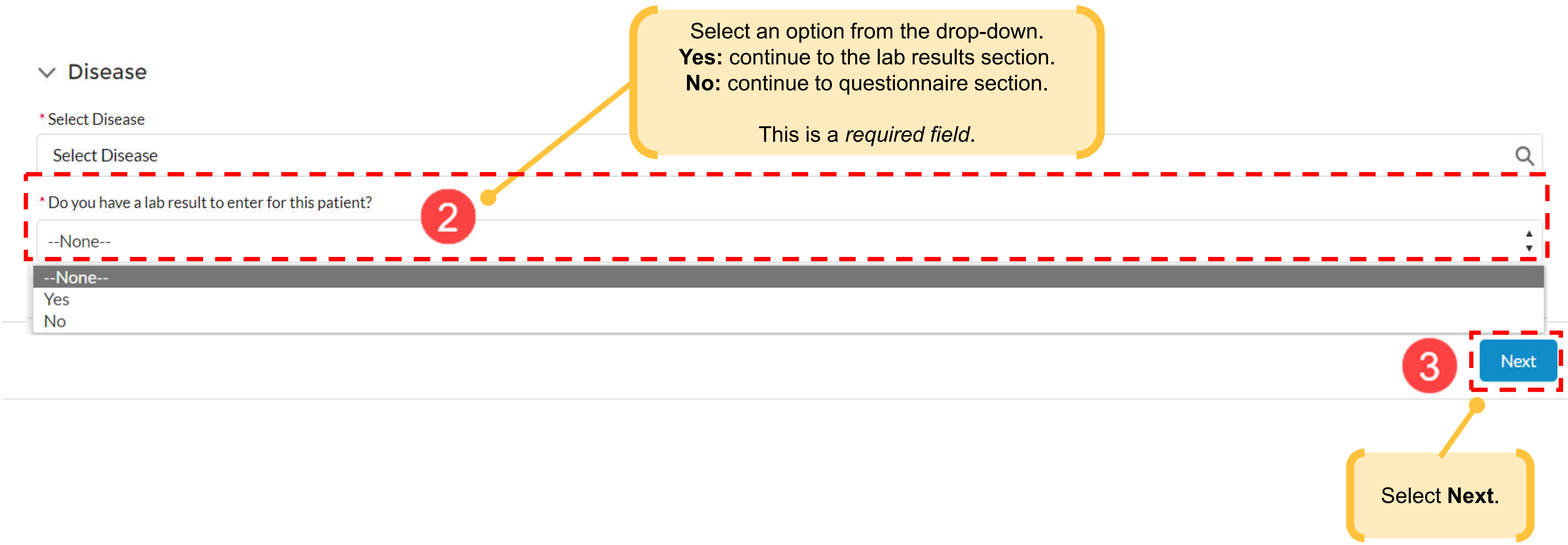
Case is Currently Pregnant: should select the **box** if the individual is pregnant.

Manual Intake Process: Disease

The last section for the first page of the Manual Intake is the **Disease** section. Providers will select a disease from the drop-down. If a patient has multiple disease diagnoses, providers will need to complete the Manual Intake process twice.

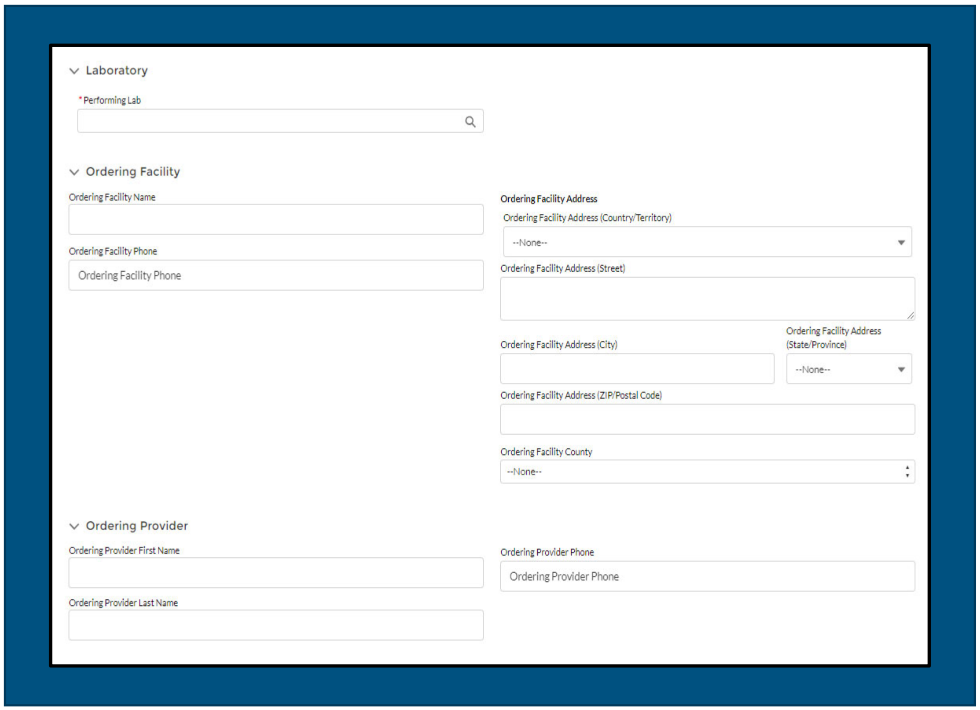
Manual Intake Process: Lab Report

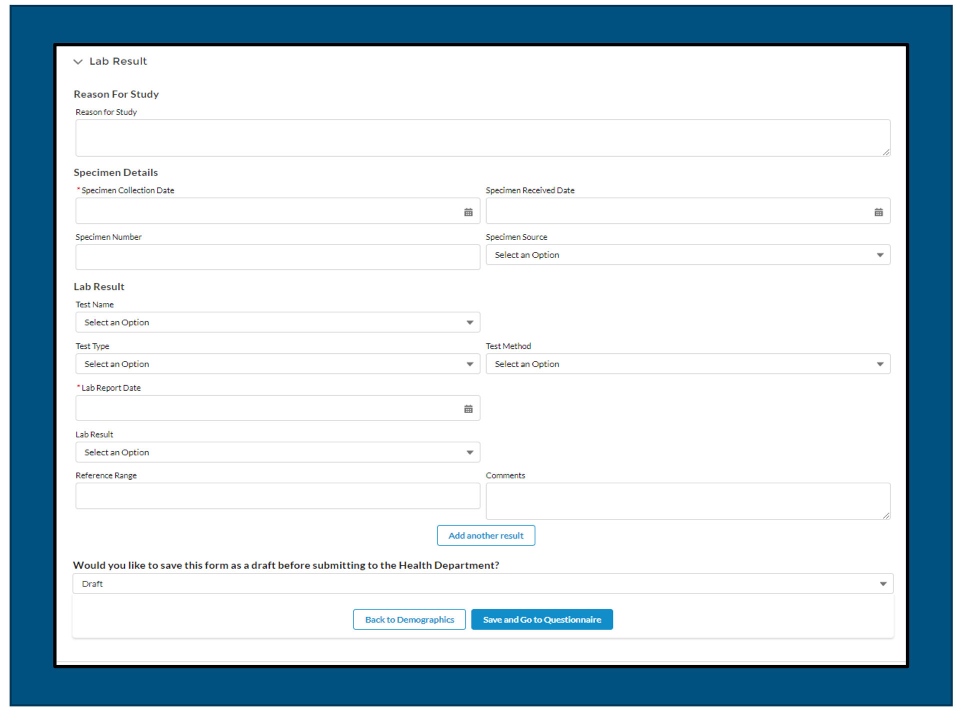
To finalize the **Disease** section of the Manual Intake Process, providers will complete information for labs, as available. If the provider has lab results to enter, select **Yes** from the **Do you have a lab result to enter for this patient?** drop-down. If there are no lab results to enter, select **No.** Selecting no will skip over the lab results section in the Manual Intake process and move onto the questionnaire.



Manual Intake Process: Provider Information and Lab Results

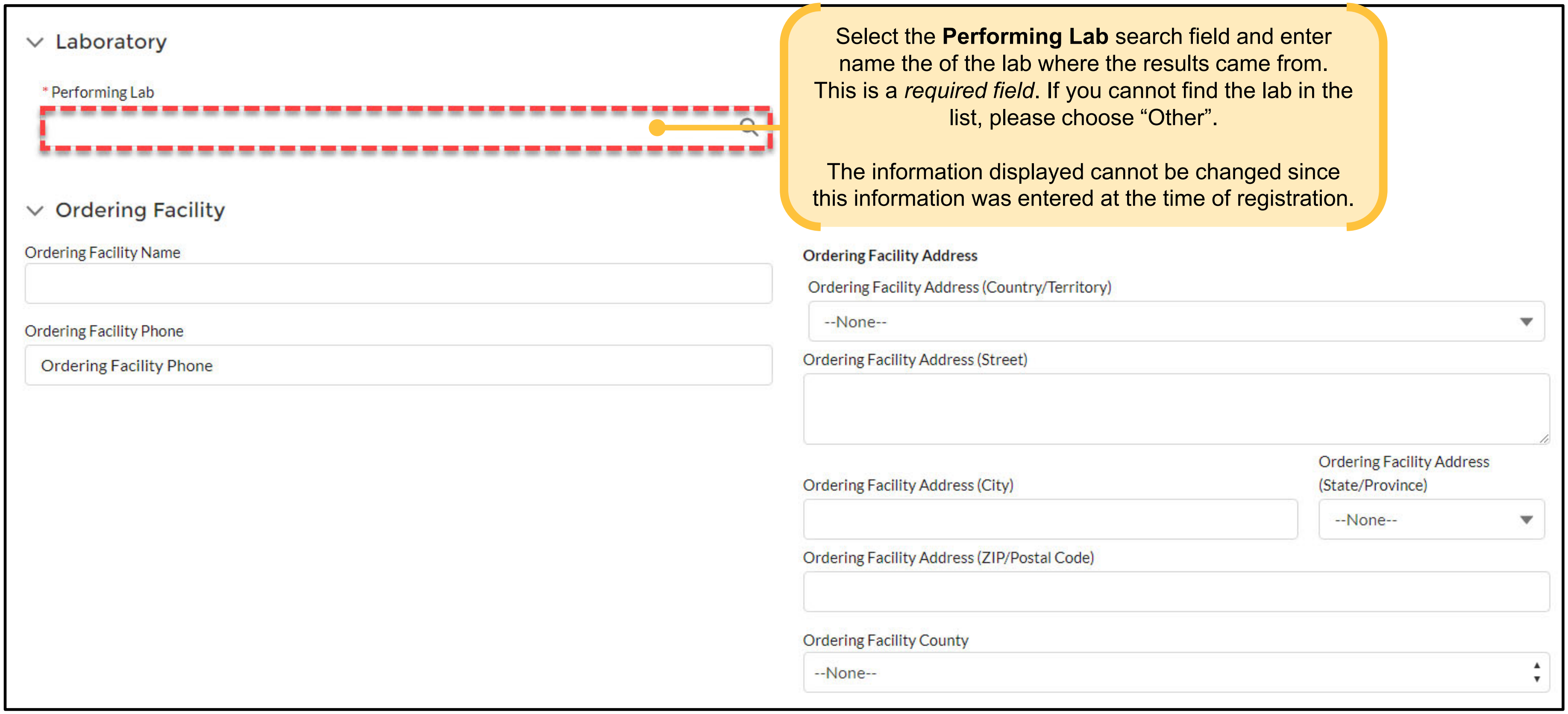
The second part of the Manual Intake process includes completing **laboratory information, provider information, and lab results**. Providers will only complete this if they answered “Yes” to the lab results questions on the first page. Each section will be described throughout the following slides.





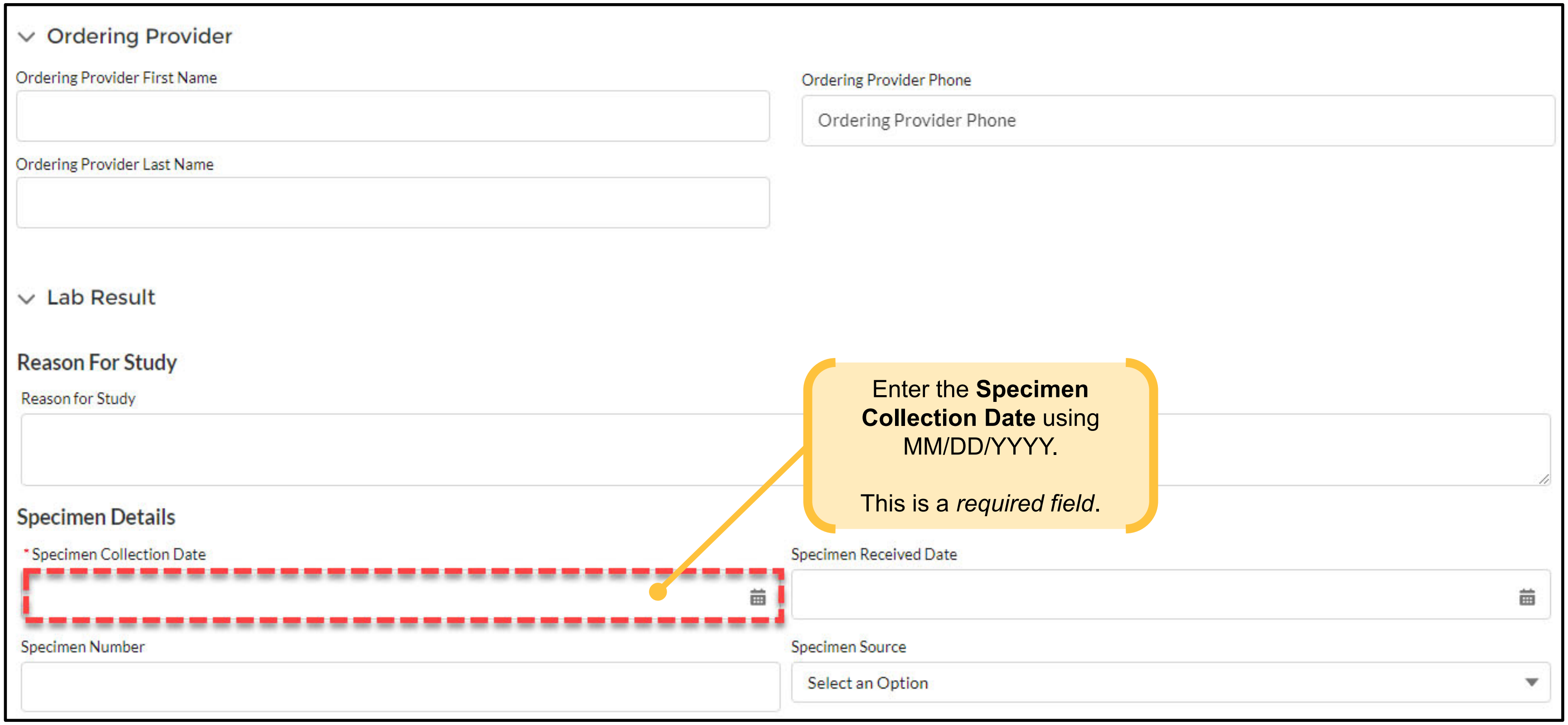
Manual Intake Process: Laboratory and Ordering Facility

To manually enter a lab, providers will also need to complete the **Laboratory** and **Ordering Facility** sections. Enter the name of the Performing Lab and complete other fields as well, if possible. If the lab is not located in the **Performing Lab** field, select **Other** and enter the lab's information.



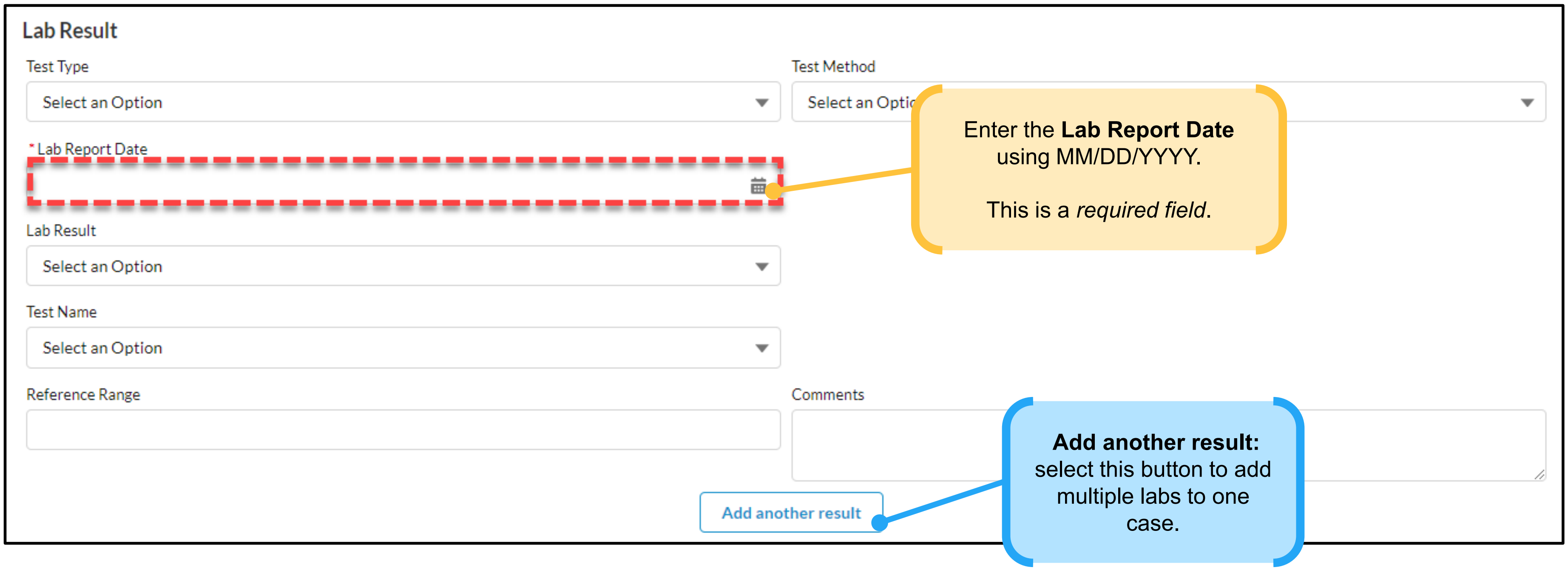
Manual Intake Process: Ordering Provider, Reason for Study, and Specimen Details

To continue entering lab information, providers need to complete the **Ordering Provider, Reason for Study,** and **Specimen Details** sections. Providers will need to complete the required field and any other fields from gathered information.



Manual Intake: Lab Result

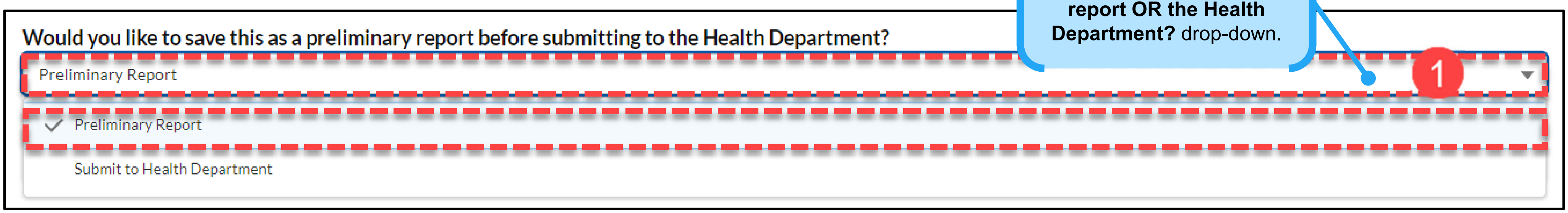
Enter the date of the **Lab Report** in the required field, and complete other fields if possible/data is available.



Manual Intake Process: Preliminary Report vs. Submit to Health Department

After providers have completed all the required fields for the lab results, they can save the report as a **Preliminary Report**. The purpose of the preliminary report is to notify the Local health department (LHD) of the new case while they may still be collecting information about testing, treatment, etc. Providers can come back and add information over time when the report is in **"Preliminary Report"** status. When providers are finished with a report, then they **"Submit to Health Department".**

Select the Would you like to save this as a **preliminary report OR the Health Department?** drop-down.

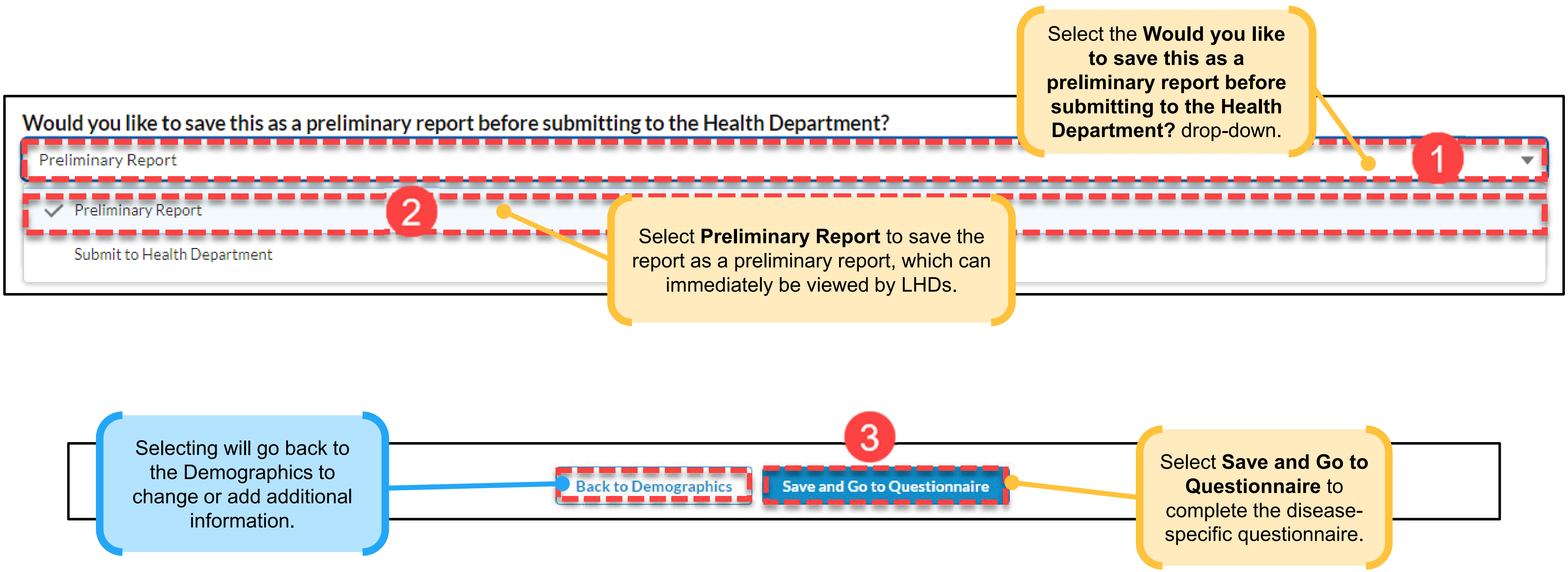


Selecting will go back to the Demographics to change or add additional information.

Select Save and Go to Questionnaire to complete the disease-specific questionnaire.

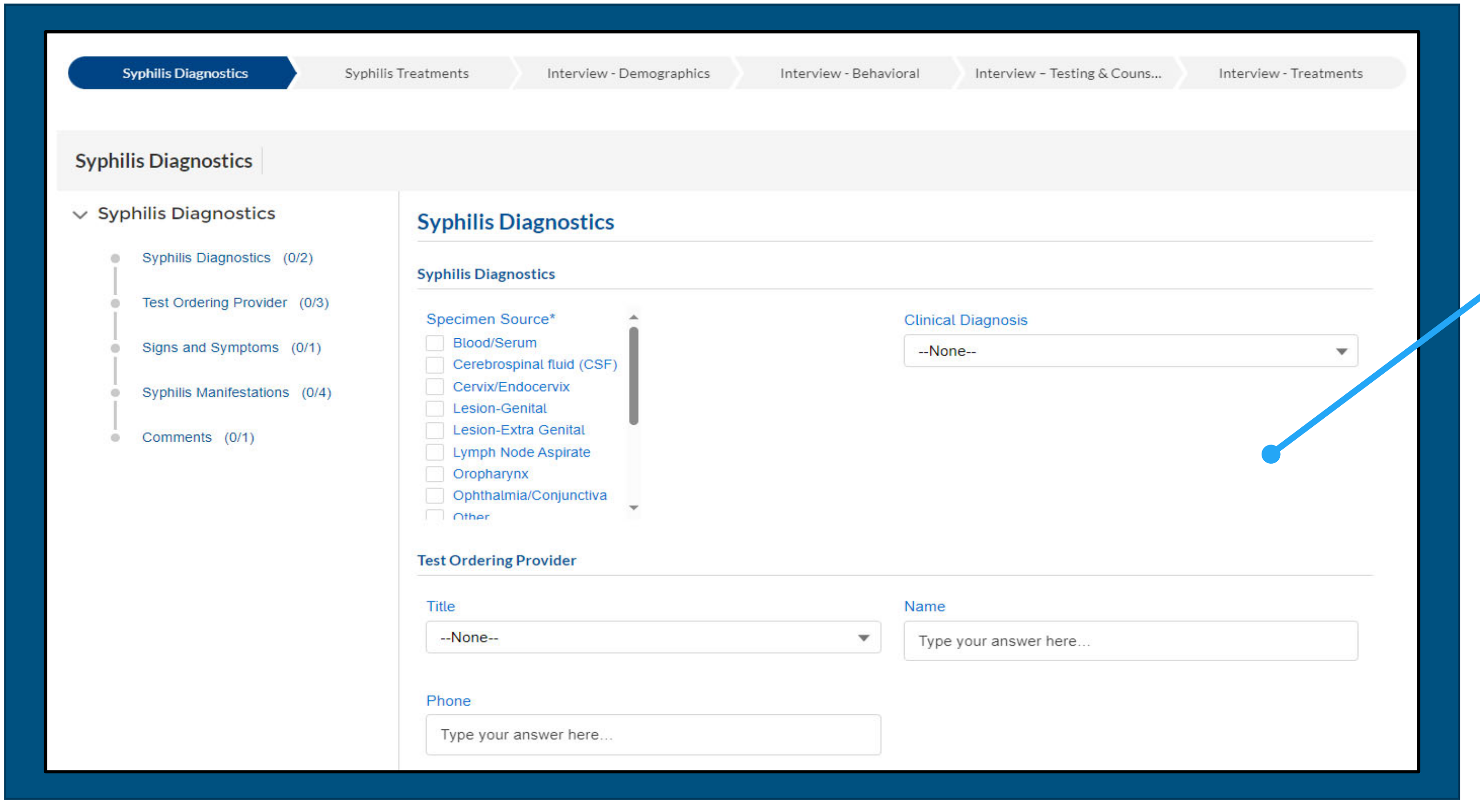
Manual Intake Process: Saving

After providers have completed all the required fields for the lab results, they can save the report as a **Preliminary Report**. Providers cannot save reports until full person, disease report, and lab results (if applicable) are input into the system. Once a preliminary provider report is saved, it is immediately accessible to LHDs. Providers can return to preliminary reports and add additional information if it becomes available. Once a preliminary report is saved, they can select the **Submit & Go to Investigation Questionnaire** to move onto the questionnaire.



Manual Intake Process: Questionnaire

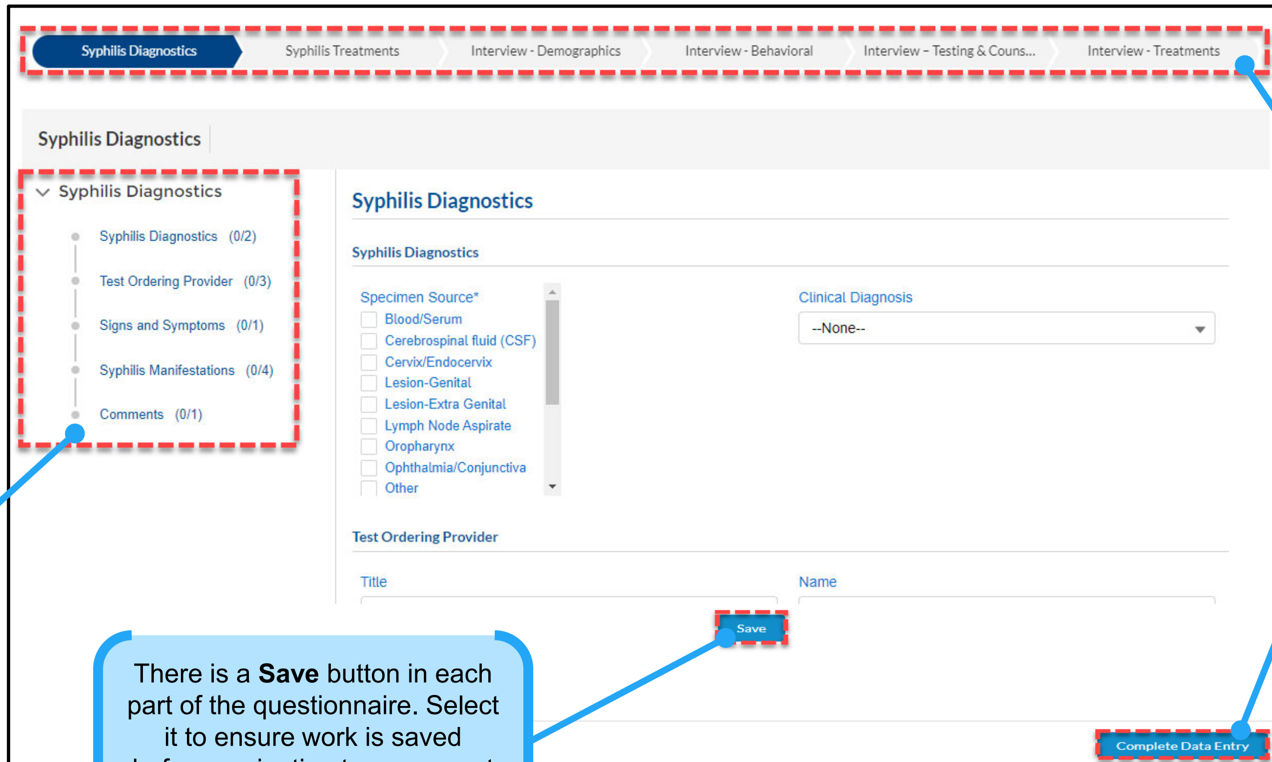
After saving a preliminary report or submitting a final report, providers will have the opportunity to answer disease-specific questions for the provider report, as they are able. These pages of questions are called the "questionnaire". The example being discussed throughout the next few slides will focus on STIs. Remember that the questions will be different depending on the disease and providers should focus on entering information that's currently known and available.



The questionnaire portion of the Manual Intake process is a set of pages that contain disease specific questions for the report. Some questions include **diagnostic information, epidemiologic factors, and treatment information**.

Manual Intake Process: Navigating the Questionnaire

To move throughout the questionnaire, select the **chevrons**. To the left of the questions within each section will be a tracker. It will be checked and show the number of questions answered in parentheses. Remember to select **Save** within each section to saved entered information.



Selecting the **chevrons** will allow users to move throughout any portion of the questionnaire.

The types of questions will be listed here. It will have a **checkmark** next to it along with the number of questions answered in **parentheses**.

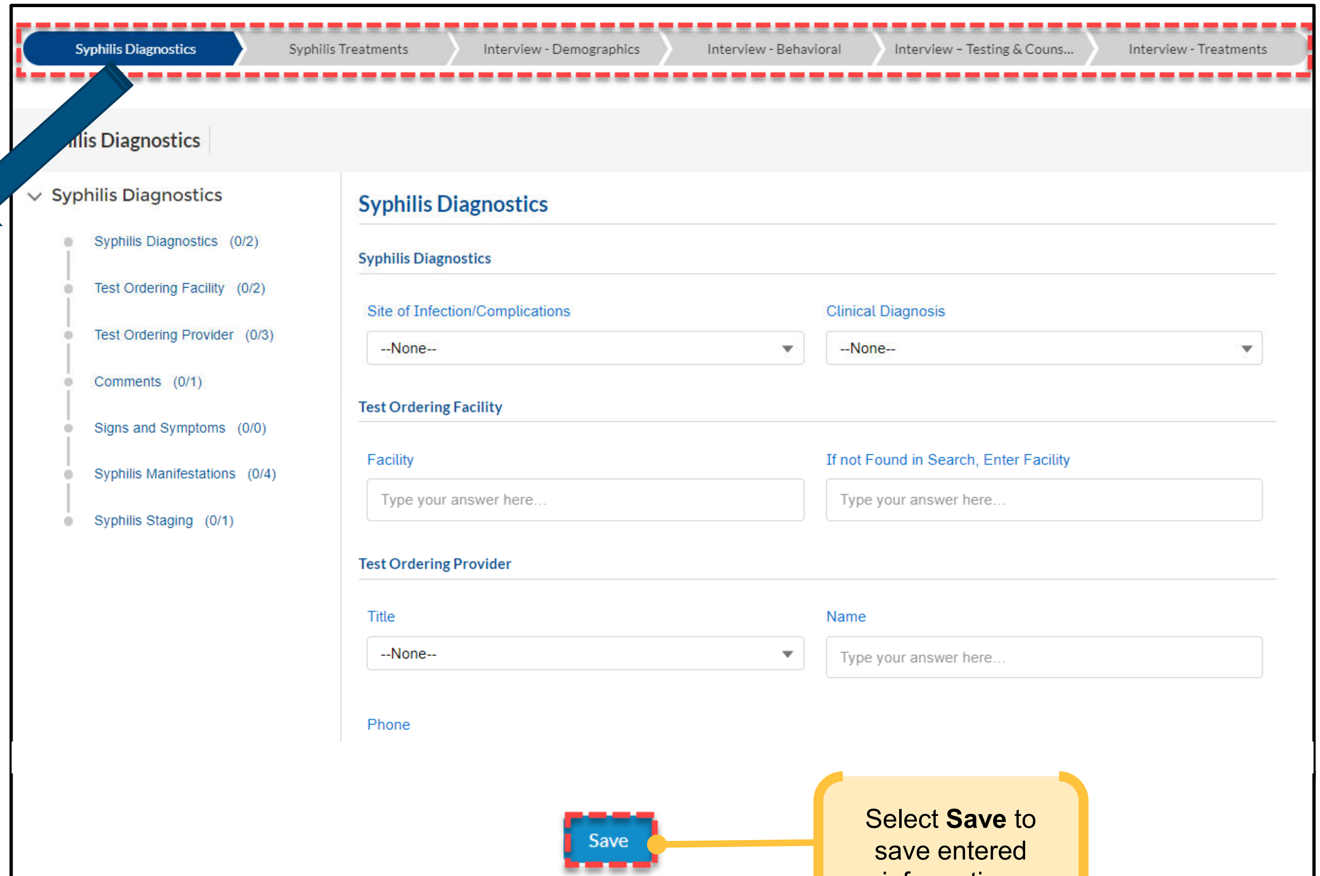
There is a **Save** button in each part of the questionnaire. Select it to ensure work is saved before navigating to a new part of the questionnaire.

Selecting **Complete Data Entry** finalizes the questionnaire and is sent to the local health department.

Manual Intake Process: STI Questionnaire (1 of 3)

The first section in an STI questionnaires will be **Diagnostics**. This section includes the testing ordering provider's information, signs and symptoms, and additional pertinent comments. At the end of this section, select **Save** to save the entered information.

	Diagnostics
Syphilis	• Syphilis Diagnostics • Test Ordering Provider • Signs and Symptoms • Syphilis Manifestations • Comments
Chlamydia Gonorrhea	• STI Diagnostics • Test Ordering Provider • Comments

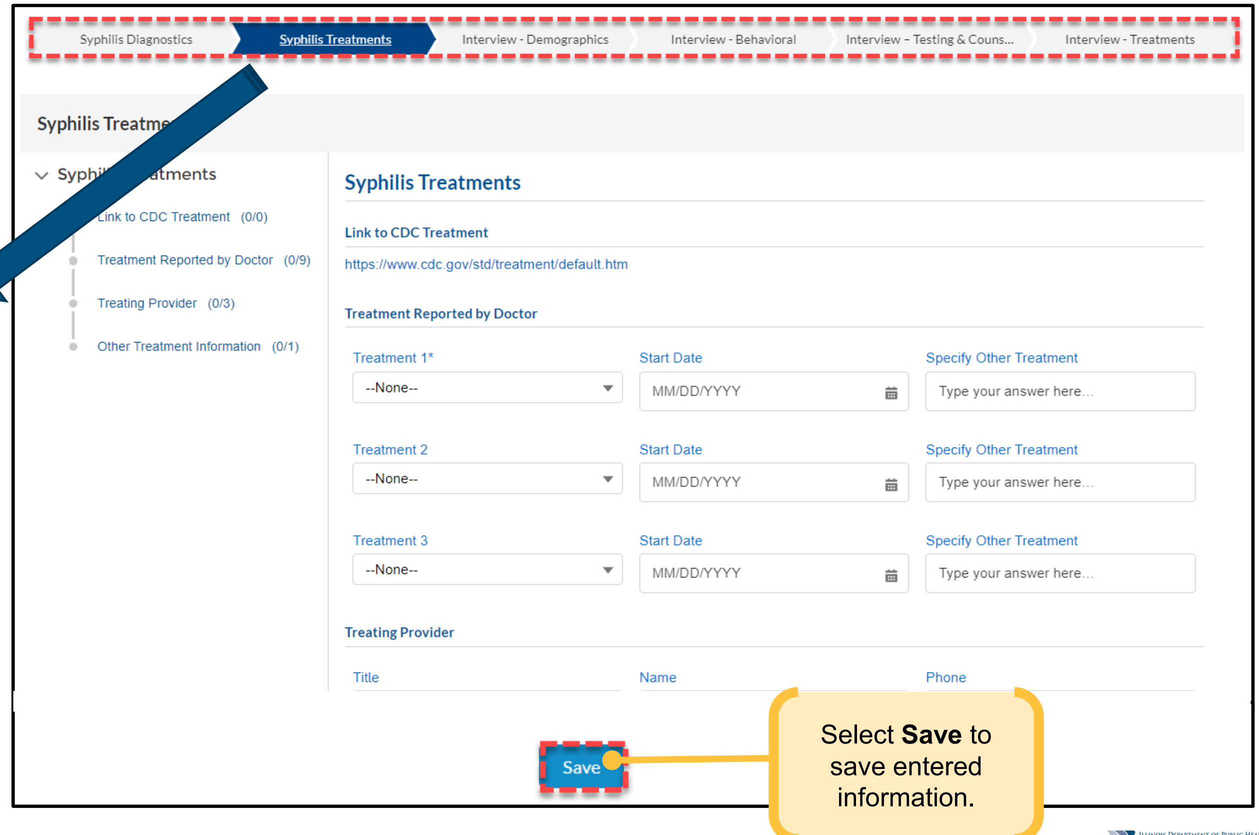


Select **Save** to save entered information.

Manual Intake Process: STI Questionnaire (2 of 3)

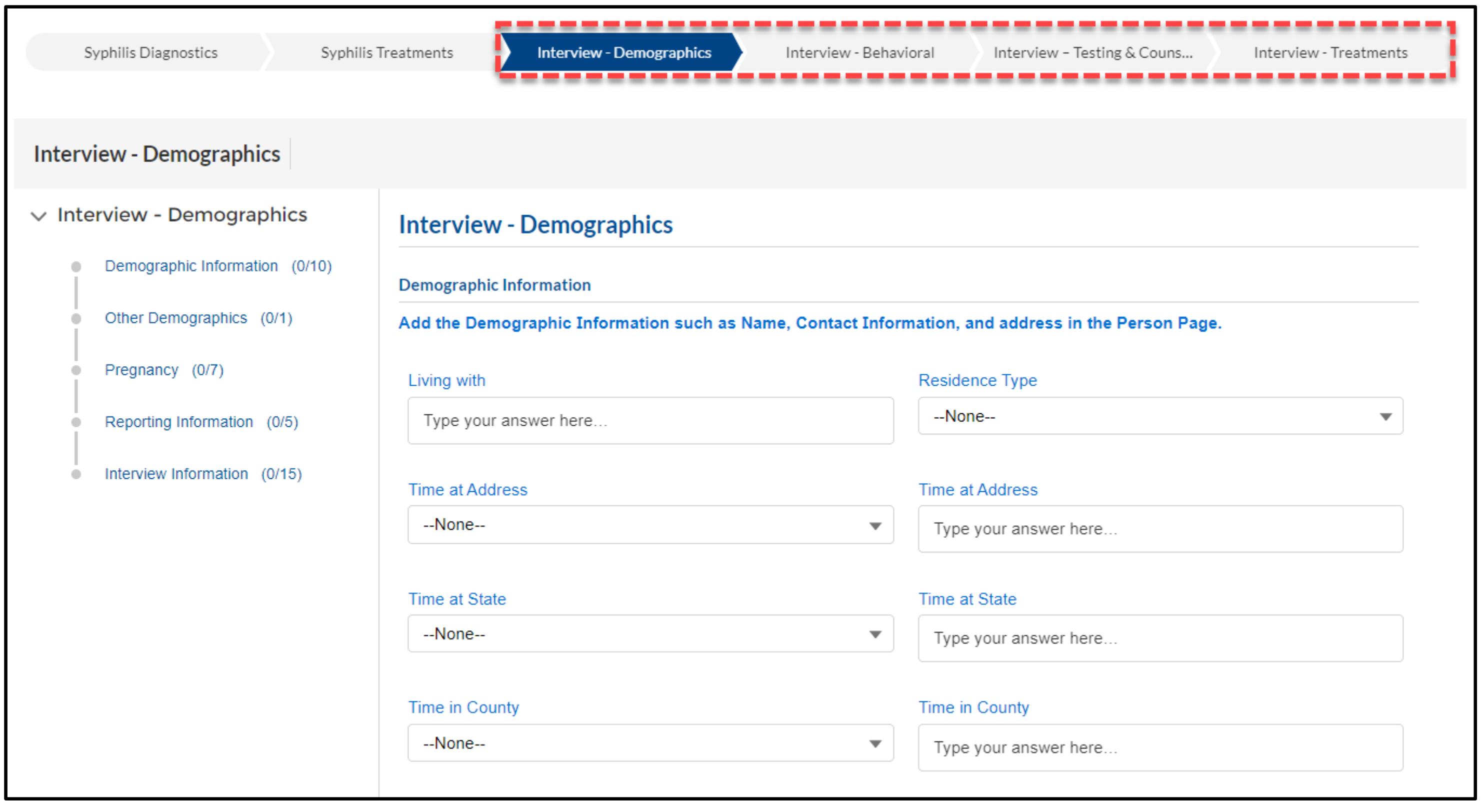
The second section in an STI questionnaire will be **Treatments**. This section includes a link to the CDC treatment, treatments reported by the provider, and who treated the individual. At the end of this section, select **Save** to save the entered information.

	Treatments
Syphilis	• Link to CDC Treatment • Treatment Reported by Doctor • Treating Provider • Other Treatment Information
Chlamydia Gonorrhea	• Link to CDC Treatment • Treatment Reported by Doctor • STI Expedited Partner Therapy (EPT) • Treating Provider • Other Treatment Information



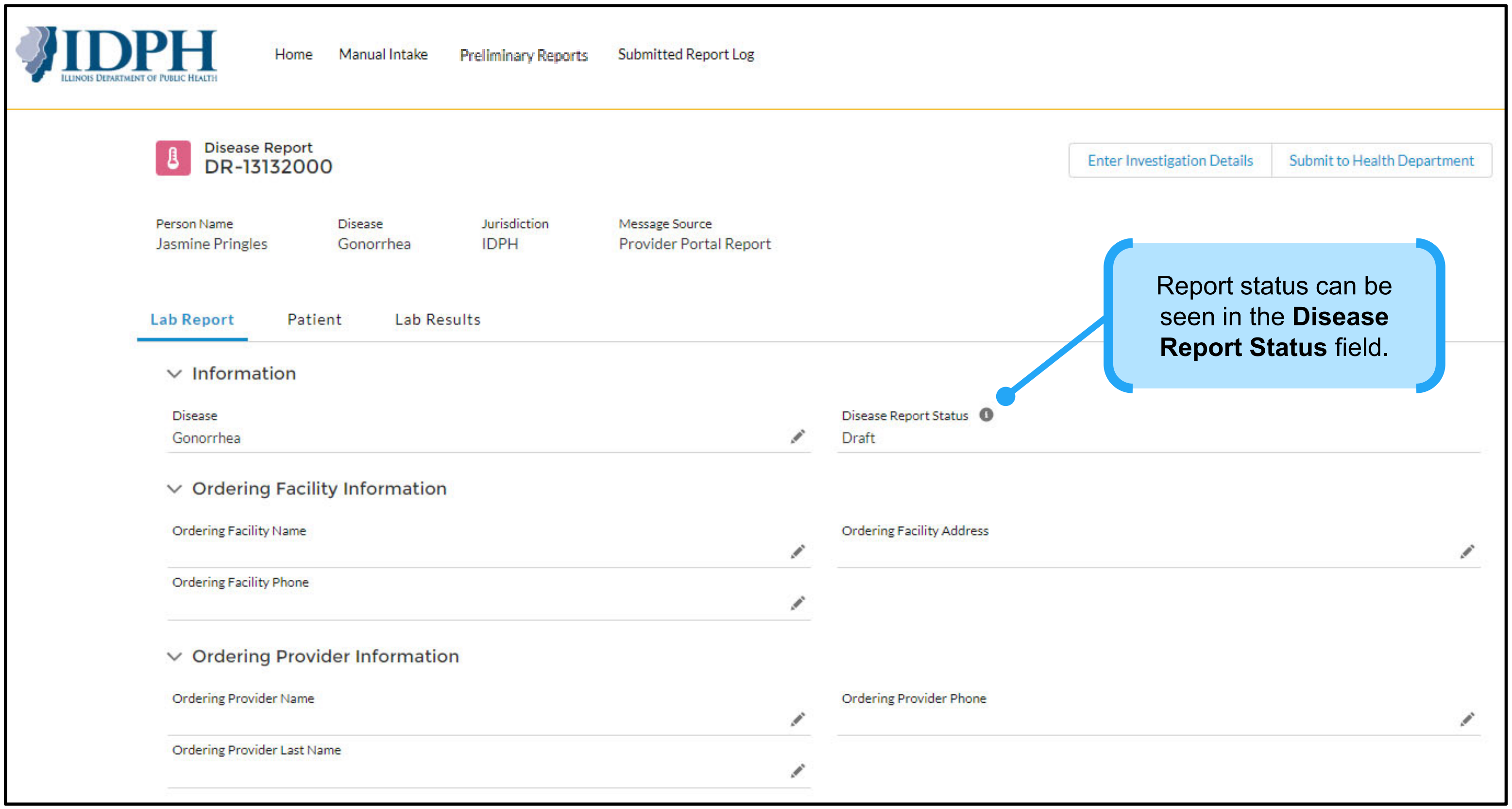
Manual Intake Process: STI Questionnaire (3 of 3)

The other sections of the questionnaire are optional and may be completed if providers have the information. These sections include patient demographic information, patient sexual history, and more. When entering information in these sections, select **Save** at the end of the sections to save the entered information. If no other information is needed to be entered, select **Complete Data Entry** at the bottom of any of the sections to complete the questionnaire.



Manual Intake Process

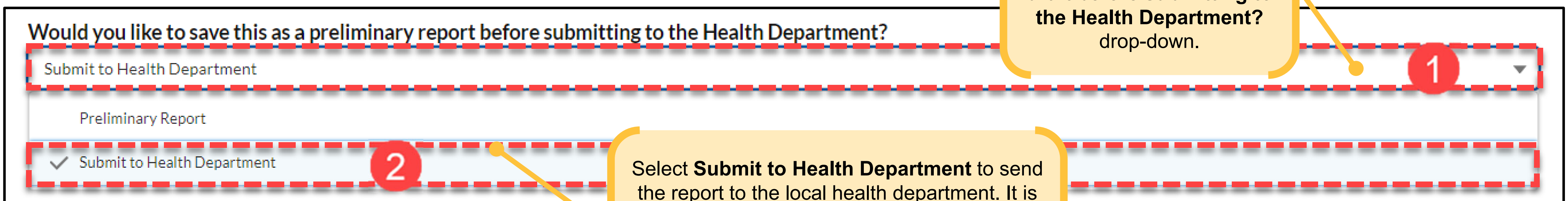
Once the manual intake process is complete, the Disease Report will be in either the **Preliminary Reports** or **Submitted Report Log** sections. Preliminary Reports can be edited anytime but are immediately accessible to local health departments when all mandatory person, disease, and lab information is completed. When final reports are submitted, information will be routed to the appropriate jurisdiction and the local health department will be notified in IDSS.



Manual Intake Process: Submitting

If providers have no additional information to enter for demographic, lab, or disease report information, they can select submit the information to the local health department by selecting **Submit to Health** Department option. Once an option is selected, they can select the **Submit & Go to Investigation Questionnaire** to move onto the questionnaire.

Select the **Would you like to save this form as a draft before submitting to the Health Department?** drop-down.



Select **Submit to Health Department** to send the report to the local health department. It is important to note that the demographic, lab, and disease report information cannot be edited after submission.

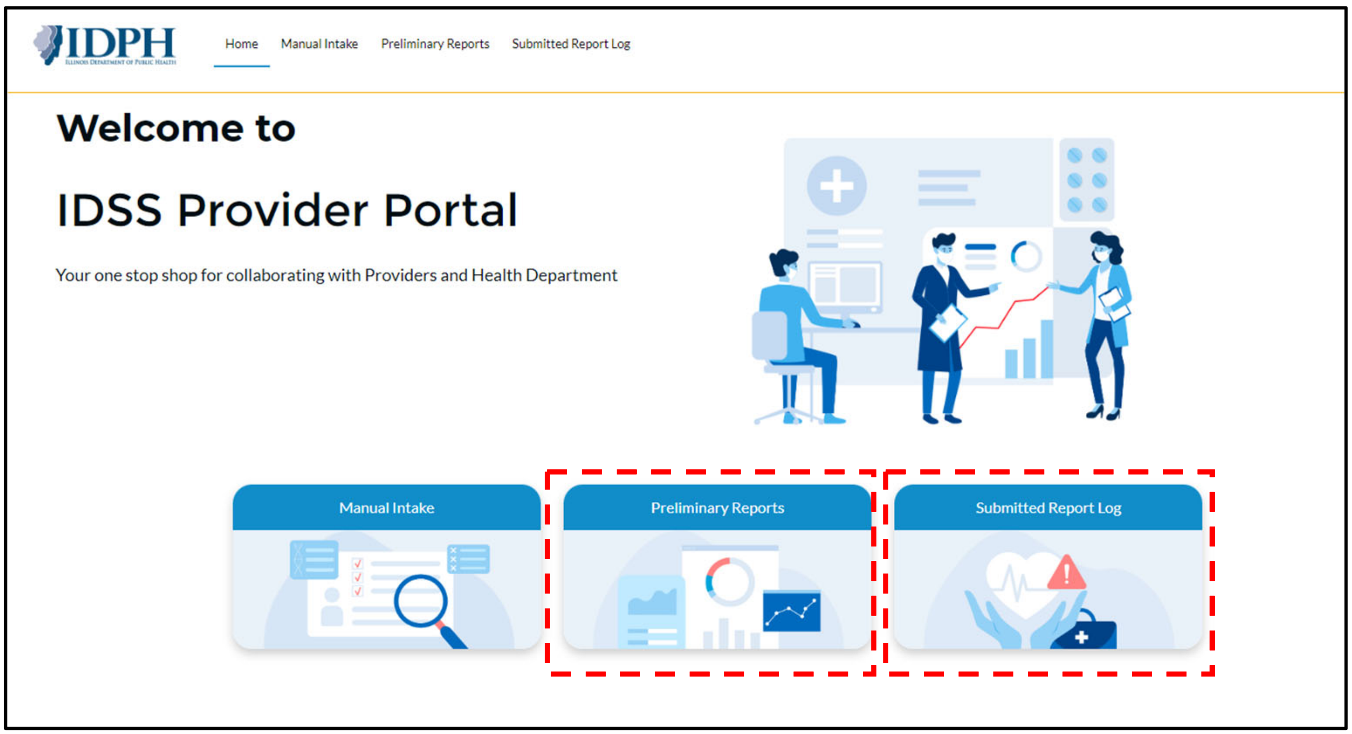
Selecting will go back to the Demographics to change or add additional information.

Select **Save and Go to Questionnaire** to complete the disease-specific questionnaire.

Reviewing Provider Reports

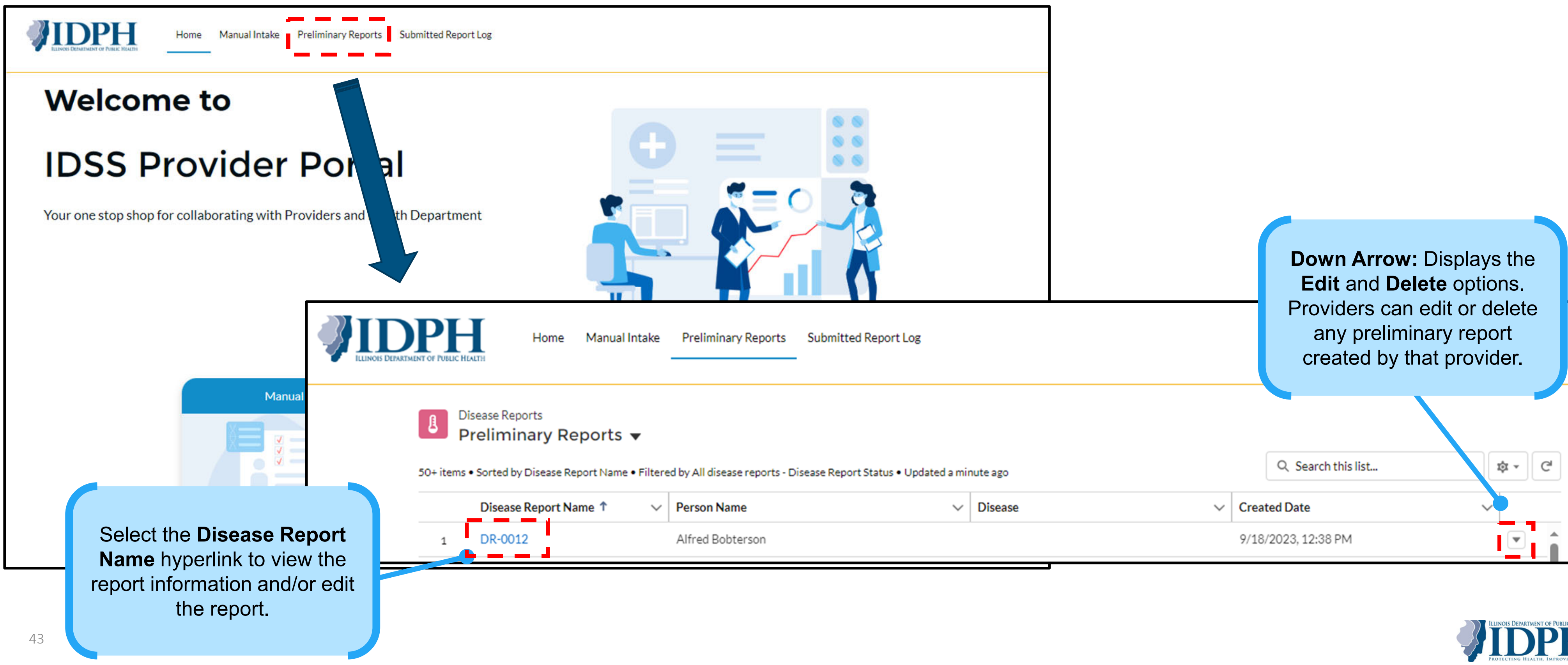
Overview: Reviewing Provider Reports

Within the Provider Portal, users can view preliminary or submitted provider reports. These reports may contain lab, results, patient information, and questionnaire answers. The **Preliminary Reports page** contains reports that have been saved as preliminary reports and contain all mandatory person, provider report, and lab result (if applicable) information. **Preliminary reports are accessible to LHDs, but providers can return to preliminary reports and add additional information if it becomes available**. The **Submitted Report Log** contains final reports that have been submitted to the local health department.



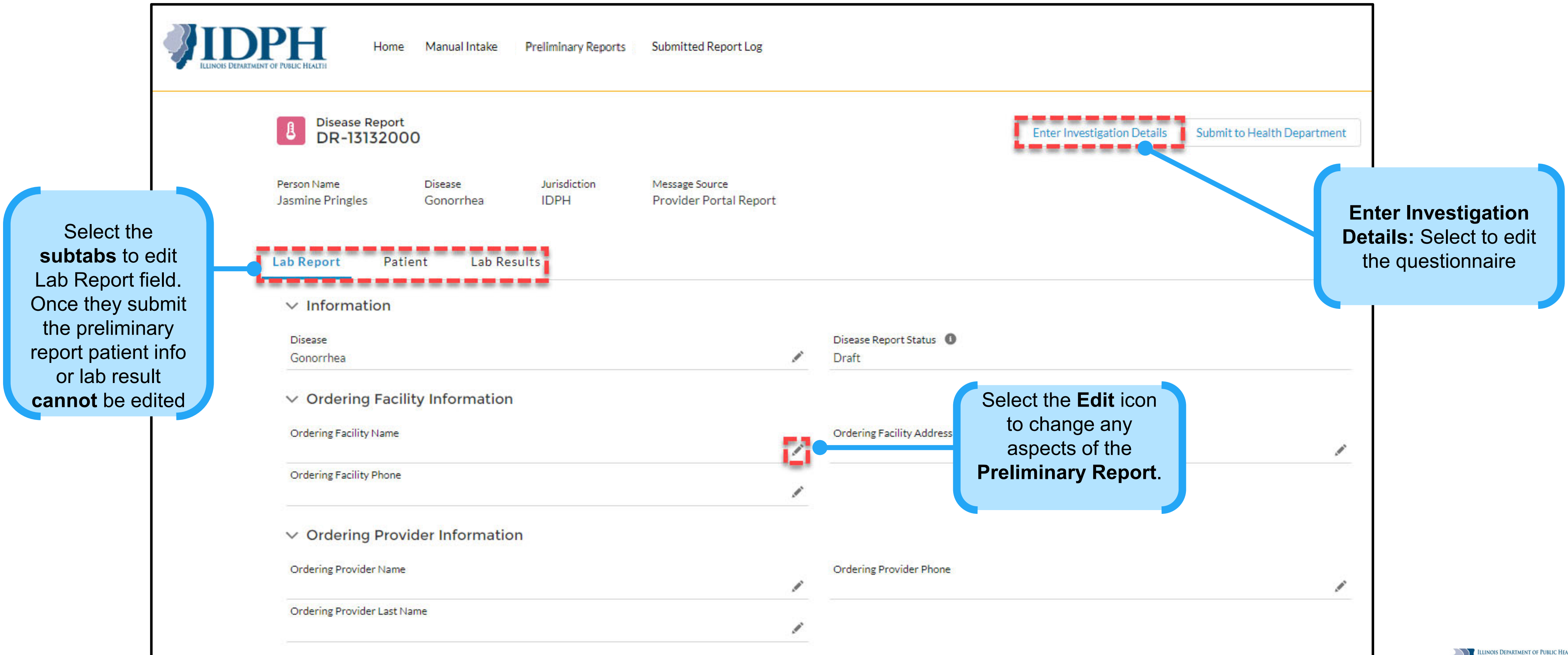
Preliminary Reports

The **Preliminary Reports** page displays all reports saved as **Draft**; this includes reports entered by both the provider and other providers within their organization. Preliminary reports include all mandatory person, provider report, and lab result (if applicable) information. Preliminary reports are immediately accessible to LHDs once all mandatory information has been completed, but providers can return to preliminary reports and add additional information if it becomes available.



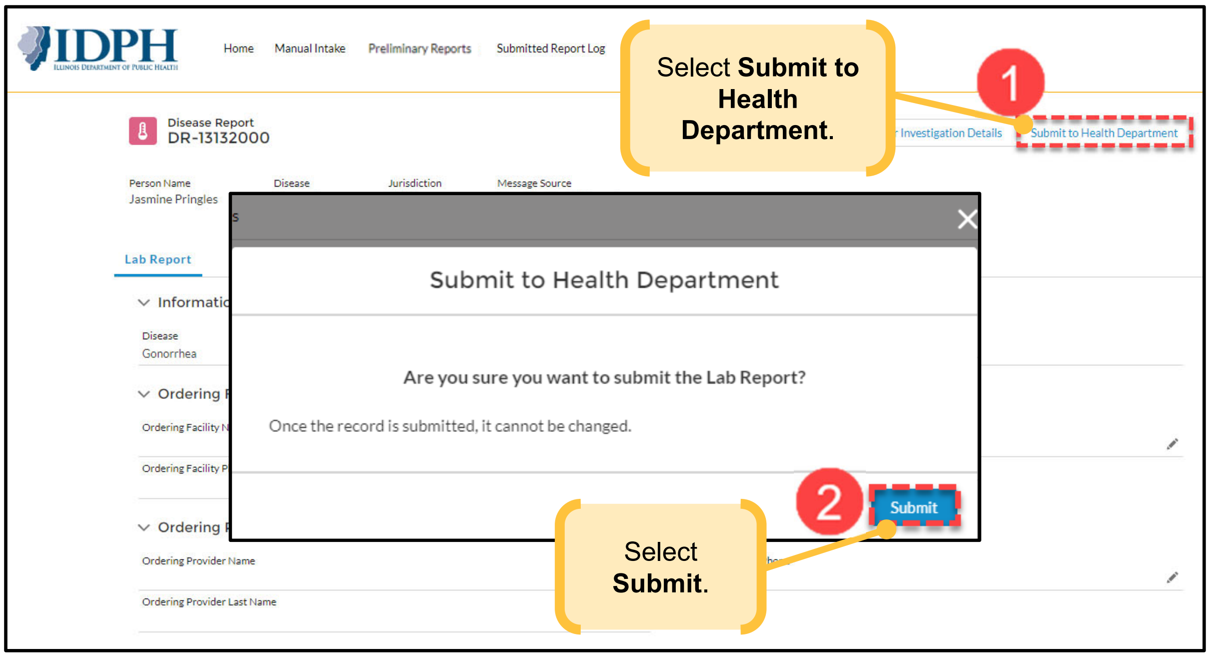
Preliminary Reports: Enter Investigation Details

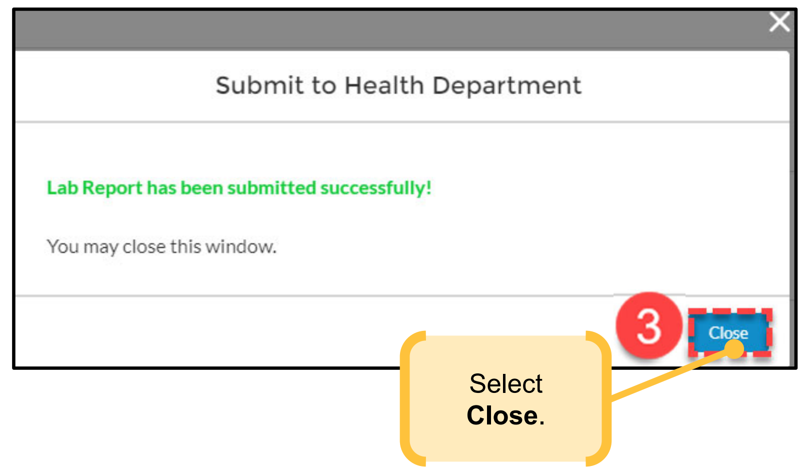
To edit information, select the **Edit** icon next to any of the fields to make updates. In this example, users can change the ordering facility information. To edit the questionnaire, select the **Enter Investigation Details** button.



Preliminary Reports: Submitting

Once providers have entered all the necessary information for the report and are ready to send the final information to the local health department, select the **Submit to Health Department** button. After the process is completed, the **Disease Report Status** field will update to **Submitted to Health Department**.





Submitted Report Log

The **Submitted Report Log** page displays all finalized disease reports submitted to the local health department. This includes provider reports entered by both the current user and other providers within their organization.

Wrap Up

How will this impact my work?

For next steps, providers should confirm access to the IDSS system. Beginning July 15, providers will begin manually reporting STI and TB in the IDSS provider portal and STI and TB ELRs will begin to automatically load into the system.

Provider Access	*Providers who have logged into I-NEDSS between December 2022 and April 2024 have received communications from dph.idss@illinois.gov and have been automatically uploaded as users into the new system.* ***Providers who have not received an email will need to request access by emailing DPH.IDSS@illinois.gov.***
Automatic Receipt of Hospital ELRs	*Beginning July 15, as part of Release 1,* ***ELRs sent by hospitals*** *for chlamydia, gonorrhea, syphilis, congenital syphilis, Mpox, and tuberculosis will* ***automatically be received*** *into the new IDSS for local health departments to process.*
Provider Reporting in IDSS	*Beginning July 15, providers who* ***manually report*** *chlamydia, gonorrhea, syphilis, congenital syphilis, Mpox, and tuberculosis in the provider portal will do so in the* ***new IDSS provider portal****.*
Continuing Use of IDSS	*After* ***Release 2****, provider reports related to* ***all diseases and conditions will*** *be submitted through* ***the new IDSS provider portal****.*

Illinois Department of Public Health
IDPH
Protecting Health, Improving Lives