

Managing OST Users (OST Leads)

April 6th, 2026

April 8th, 2026

Introductions

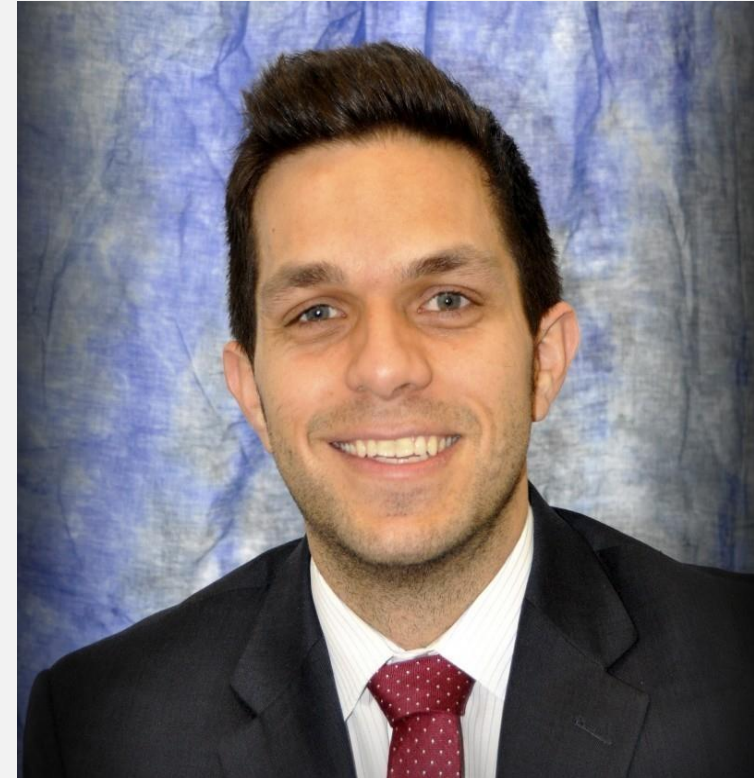
Host's Name: Hayes McLeod

Host's Location: Nashville, TN

(originally North Myrtle Beach, SC)

Fun Fact:

- I've been to 100+ sporting venues (i.e., baseball, basketball, etc.)
- Music City Influence / Favorite Bands
- Visited 10+ National Parks
- I've had less than 10 cups of coffee in my life
- Favorite Shows: The Chosen, Big Brother



Welcome to Managing OST Users!



SESSION OVERVIEW

This virtual instructor-led training provides Online Specimen Tracking (OST) Leads with instructions on managing user access in the OST Portal.



WHO SHOULD ATTEND THIS SESSION:

OST Leads



SESSION DURATION:

45 minutes



REQUIRED PRE-REQUISITES:

N/A

Agenda

Module	Duration
Course Introduction	5 min.
Topic 1: Navigating to the Manage OST Users Screen	5 min.
Topic 2: Adding a New User	10 min.
Topic 3: Updating Existing User Information	10 min.
Topic 4: Extending User Access	5 min.
Topic 5: Removing User Access	5 min.
Wrap-up and Q & A	5 min.

Session Logistics

During the session, you may be accessing the NBS 2.0 training environment to submit transactions.

Training Environment	Today's session will provide demonstrations within an NBS 2.0 Microsoft Dynamics training environment. Sensitive information has been masked throughout the session.
Demo Data	All demonstrations and transactions will use test (fake) employees and data to model real scenarios securely.
Environment Disclaimer	Training materials, system settings, and environment may differ from the final production (Go-Live) system.
Session Recording	A recording of this session will be made available in for future reference.

Session Notice Page

During the session, we will cover the global features and workflows of NBS 2.0 (Microsoft Dynamics).

- There may be some **role-based or department-specific procedures** that are outside the scope of this training session—we will not be covering those in detail today.
- As we review the training material, **please note any questions related to your specific role or SOPs and keep a list for follow-up.**
- We will **leave time at the end of the session for questions** and may ask you to send more detailed, role-related inquiries by email so we can address them appropriately.

Course Introduction

Introduction of course objectives

Course Objectives

By the end of this course, you should be able to:

- Navigate to the Manage OST Users screen within the OST Portal
- Add a new OST Portal user
- Update information for an existing user
- Extend user access
- Remove user access

Topic 1: Navigating to the Manage OST Users Screen

Locate the Manage OST User feature in the OST Portal

Select Facility – OST Lead

If your account is linked to multiple facilities, select a **Facility** from the dropdown menu. Click **Continue**.

Prenatal ▾ Newborn ▾ Genetic Counseling Licensure Resources ▾ Contact

SELECT FACILITY

[Dashboard](#) | [Select Facility](#)

Select Facility

Facility

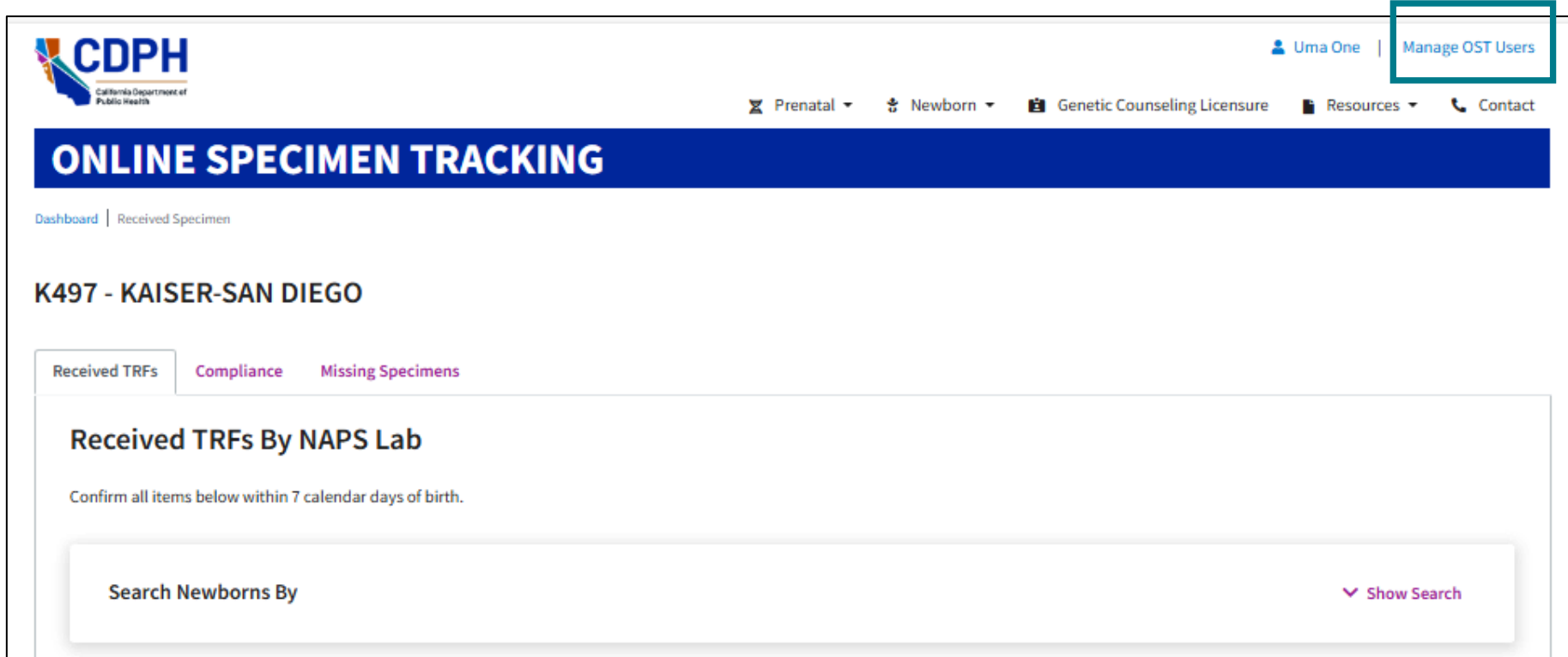
J283 - Aspiring Birth Midwifery - OST - Lead ▾

For access to an additional facility, contact the facility's lead.

[Continue →](#)

Manage OST Users Feature

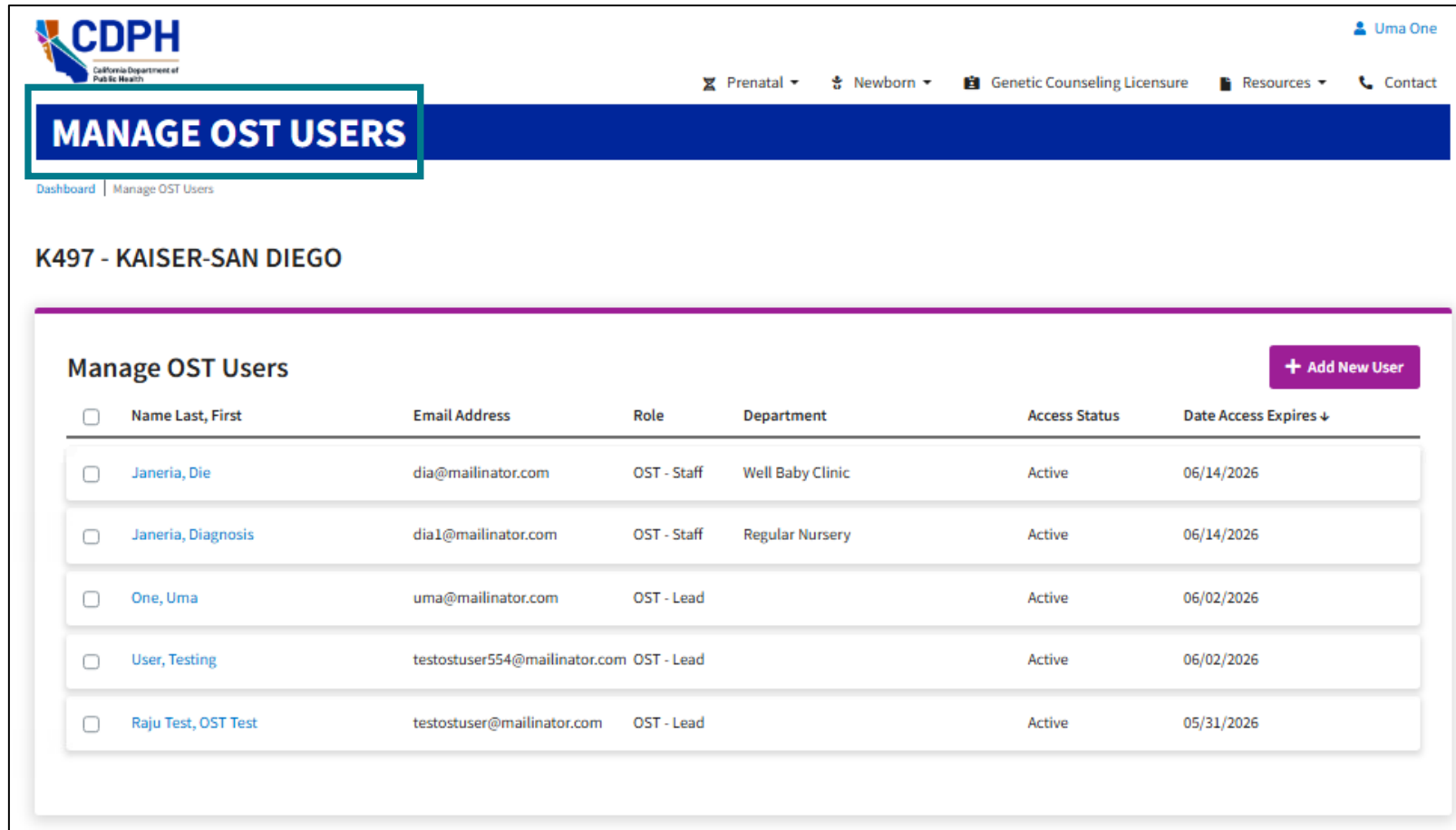
On the landing screen, click **Manage OST Users**.



The screenshot shows the CDPH (California Department of Public Health) ONLINE SPECIMEN TRACKING dashboard. The top navigation bar includes the CDPH logo, a user profile for 'Uma One', and a link to 'Manage OST Users' which is highlighted with a red box. Below the navigation bar, there are links for 'Prenatal', 'Newborn', 'Genetic Counseling Licensure', 'Resources', and 'Contact'. The main header is 'ONLINE SPECIMEN TRACKING'. Below this, there is a breadcrumb trail 'Dashboard | Received Specimen'. The main content area is titled 'K497 - KAISER-SAN DIEGO'. There are three tabs: 'Received TRFs', 'Compliance', and 'Missing Specimens'. The 'Received TRFs' tab is active. Below the tabs, there is a section titled 'Received TRFs By NAPS Lab' with a note: 'Confirm all items below within 7 calendar days of birth.' At the bottom, there is a search bar labeled 'Search Newborns By' and a 'Show Search' button.

Manage OST Users Screen

You will land on the **Manage OST Users** screen.



The screenshot shows the 'Manage OST Users' screen in the CDPH system. The header includes the CDPH logo, the user 'Uma One', and navigation links for Prenatal, Newborn, Genetic Counseling Licensure, Resources, and Contact. A blue banner at the top reads 'MANAGE OST USERS'. Below this, the breadcrumb 'Dashboard | Manage OST Users' is visible. The main heading is 'K497 - KAISER-SAN DIEGO'. The 'Manage OST Users' section features a table with columns for Name Last, First, Email Address, Role, Department, Access Status, and Date Access Expires. A '+ Add New User' button is located in the top right of the table area. The table lists five users: Janeria, Die; Janeria, Diagnosis; One, Uma; User, Testing; and Raju Test, OST Test.

☐	Name Last, First	Email Address	Role	Department	Access Status	Date Access Expires ↓
☐	Janeria, Die	dia@mailinator.com	OST - Staff	Well Baby Clinic	Active	06/14/2026
☐	Janeria, Diagnosis	dia1@mailinator.com	OST - Staff	Regular Nursery	Active	06/14/2026
☐	One, Uma	uma@mailinator.com	OST - Lead		Active	06/02/2026
☐	User, Testing	testostuser554@mailinator.com	OST - Lead		Active	06/02/2026
☐	Raju Test, OST Test	testostuser@mailinator.com	OST - Lead		Active	05/31/2026

Takeaways – The Manage OST Users Screen

In this session, we reviewed how to:

- Select your facility
- Locate the Manage OST User feature

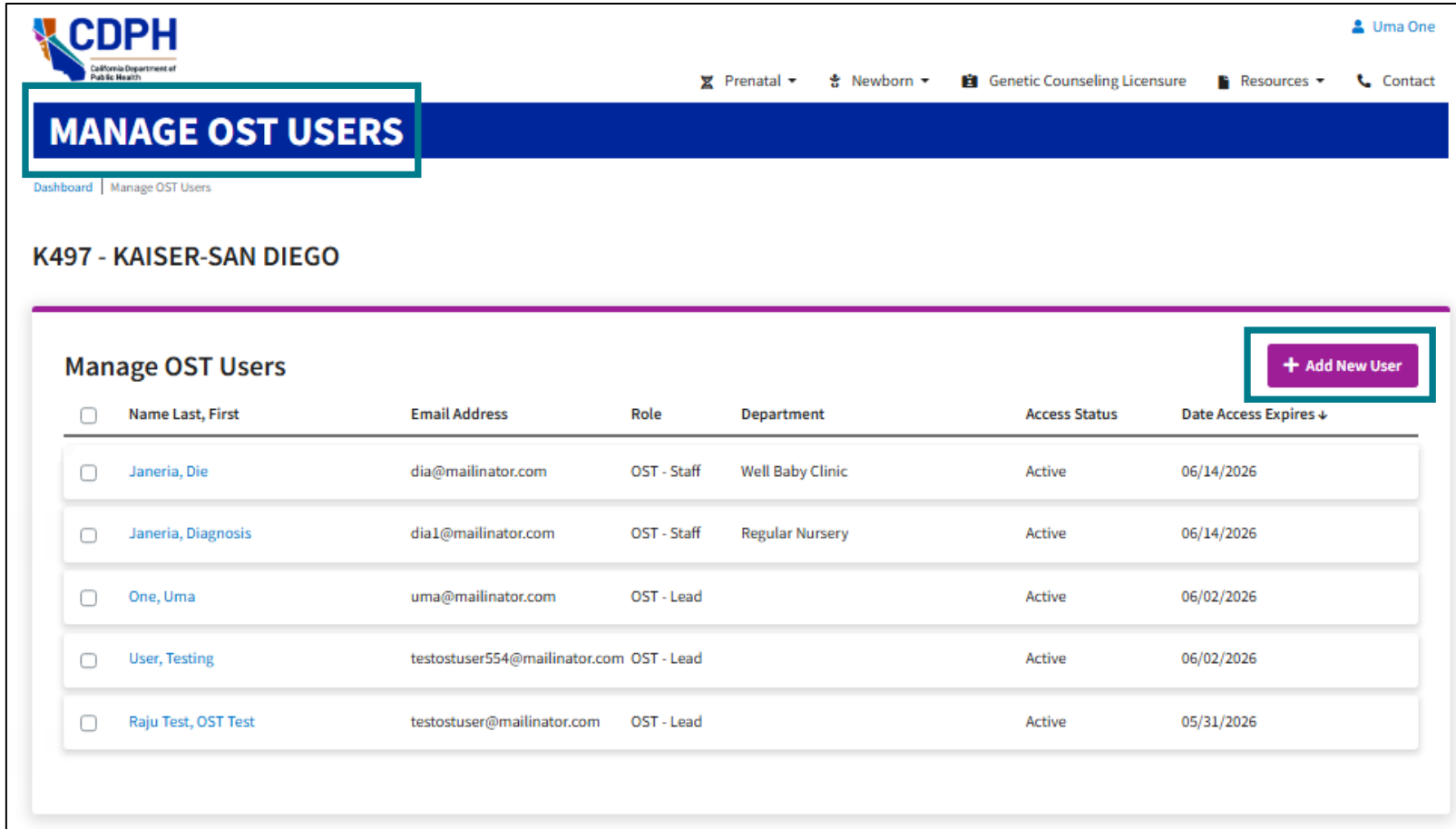


Topic 2: Adding a New User

Add a new user to the OST Portal

Adding a New User (1 of 3)

Within the **Manage OST Users** screen, click **+ Add New User**.



The screenshot displays the CDPH (California Department of Public Health) interface for managing OST (Obstetric Sonography Technician) users. The page title is "MANAGE OST USERS". Below the title, there is a breadcrumb trail: "Dashboard | Manage OST Users". The main content area is titled "K497 - KAISER-SAN DIEGO".

The "Manage OST Users" section contains a table with the following columns: Name Last, First, Email Address, Role, Department, Access Status, and Date Access Expires ↓. The table lists five users:

☐	Name Last, First	Email Address	Role	Department	Access Status	Date Access Expires ↓
☐	Janeria, Die	dia@mailinator.com	OST - Staff	Well Baby Clinic	Active	06/14/2026
☐	Janeria, Diagnosis	dia1@mailinator.com	OST - Staff	Regular Nursery	Active	06/14/2026
☐	One, Uma	uma@mailinator.com	OST - Lead		Active	06/02/2026
☐	User, Testing	testostuser554@mailinator.com	OST - Lead		Active	06/02/2026
☐	Raju Test, OST Test	testostuser@mailinator.com	OST - Lead		Active	05/31/2026

A red box highlights the "+ Add New User" button in the top right corner of the "Manage OST Users" section.

Adding a New User (2 of 3)

Complete the **required fields (*)** in the user profile. Click **Save**.

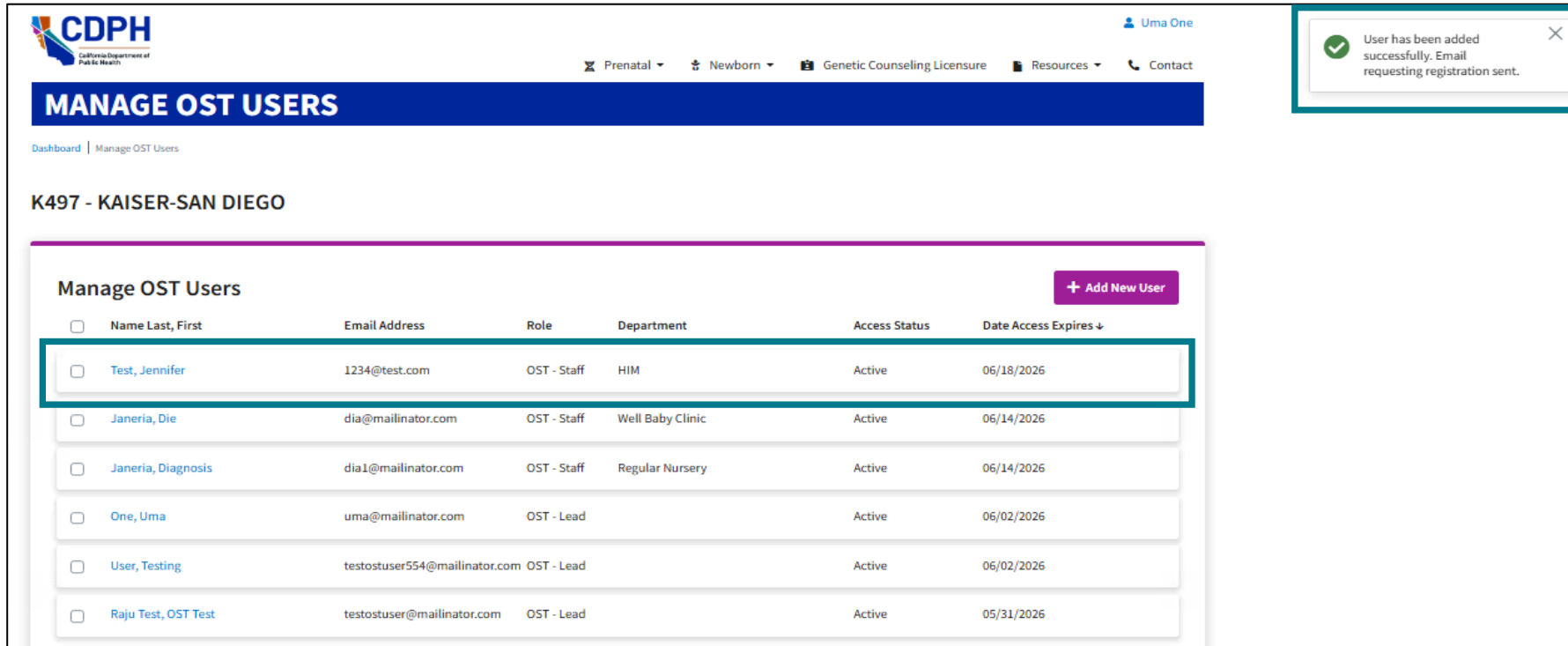
MANAGE OST USERS

[Dashboard](#) | [Manage OST Users](#) | [User Profile](#)

First Name*	Last Name*
Jennifer	Test
Email*	Role*
1234@test.com	OST - Staff
Date Access Begins*	Date Access Expires*
01/29/2026	06/18/2026
Department*	Phone Number
HIM	

Adding a New User (3 of 3)

Return to the **Manager OST User** screen to confirm the user has been added. There will be a confirmation message at the top right of the screen. The user's access will expire after 180 days.



The screenshot shows the CDPH (California Department of Public Health) interface for managing OST (Organized System of Testing) users. The page title is "MANAGE OST USERS". A confirmation message in the top right corner states: "User has been added successfully. Email requesting registration sent." The main content area displays a table of users for "K497 - KAISER-SAN DIEGO". The table has columns for Name Last, First, Email Address, Role, Department, Access Status, and Date Access Expires. The first row, "Test, Jennifer", is highlighted with a red border. A "+ Add New User" button is located in the top right corner of the table area.

☐	Name Last, First	Email Address	Role	Department	Access Status	Date Access Expires ↓
☐	Test, Jennifer	1234@test.com	OST - Staff	HIM	Active	06/18/2026
☐	Janeria, Die	dia@mailinator.com	OST - Staff	Well Baby Clinic	Active	06/14/2026
☐	Janeria, Diagnosis	dia1@mailinator.com	OST - Staff	Regular Nursery	Active	06/14/2026
☐	One, Uma	uma@mailinator.com	OST - Lead		Active	06/02/2026
☐	User, Testing	testostuser554@mailinator.com	OST - Lead		Active	06/02/2026
☐	Raju Test, OST Test	testostuser@mailinator.com	OST - Lead		Active	05/31/2026

Demonstration



DEMONSTRATION

Adding a New User

This demonstration will include:

- Adding a new user
- Completing required fields in the user profile
- Confirming the user has been saved

Takeaways – Adding a New User

In this session, we reviewed how to:

- Add a new user
- Complete required fields in the user profile
- Confirm the user has been saved



Topic 3: Updating Existing User Information

Update information in the user profile

Updating Existing User Information (1 of 3)

From the OST Users list view, click the **user** you would like to update.

Manage OST Users						
+ Add New User						
☐	Name Last, First	Email Address	Role	Department	Access Status	Date Access Expires ↓
☐	Riehl, Donna	donna.p.riehl@kp.org	Medical Records Dept Contact		Active	12/31/9999
☐	Nguyen, Lanae	lanae.x.nguyen@kp.org	Not Selected		Active	12/31/9999
☐	Sposato, Eileen	Eileen.X.Sposato@kp.org	Not Selected		Active	12/31/9999
☐	Solidum, Allan	allan.l.solidum@kp.org	Medical Records Dept Contact		Active	12/31/9999
☐	Kolehmainen, Alicia	alicia.estela@kp.org	Medical Records Dept Contact		Active	12/31/9999
☐	Izaguirre, Darlene	darlene.izaguirre@kp.org	Not Selected	Lab	Active	12/26/2029
☐	Test, Jennifer	1234@test.com	OST - Staff	HIM	Active	08/25/2026

Updating Existing User Information (2 of 3)

Update the applicable information in the user profile. Click **Submit**.

OST User Information

First Name*	Last Name*
Jennifer	Test
Email*	Role*
1234@test.com	OST - Lead
Date Access Begins*	Date Access Expires*
01/29/2026	06/18/2026
Department*	Phone Number
HIM	(NNN)-NNN-NNNN

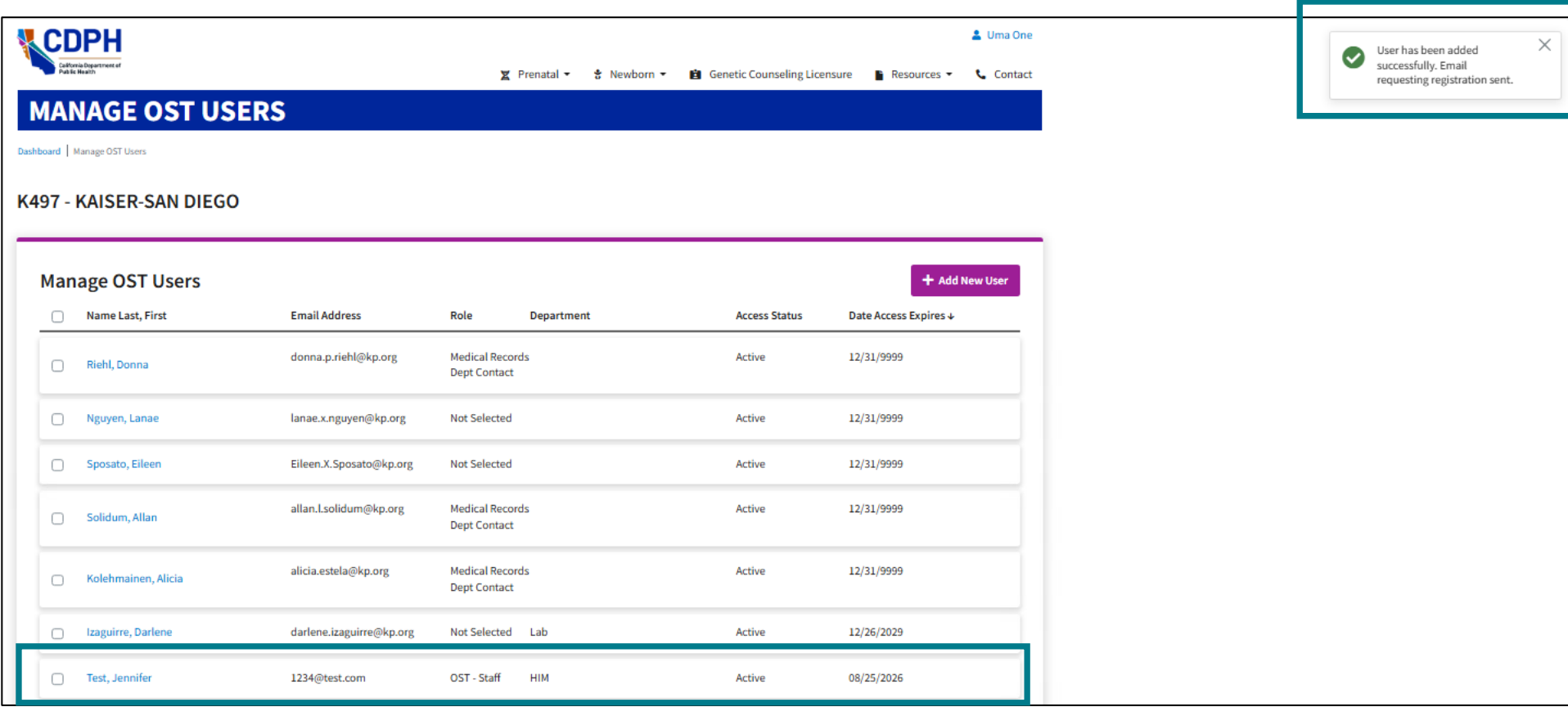
Cancel

Remove User from Facility

Submit →

Updating Existing User Information (3 of 3)

Return to the **Manage OST User** screen to confirm the information has been updated. There will be a confirmation message at the top right of the screen.



The screenshot displays the CDPH (California Department of Public Health) interface for managing OST (Occupational Safety and Health) users. At the top, the CDPH logo is on the left, and navigation links for Prenatal, Newborn, Genetic Counseling Licensure, Resources, and Contact are on the right. A user profile for 'Uma One' is also visible. The main heading is 'MANAGE OST USERS'. Below this, a breadcrumb trail shows 'Dashboard | Manage OST Users'. The specific location is 'K497 - KAISER-SAN DIEGO'. The 'Manage OST Users' section includes a table of users and an 'Add New User' button. A confirmation message in the top right corner states: 'User has been added successfully. Email requesting registration sent.' The table lists six users, with the last row, 'Test, Jennifer', highlighted by a red box.

☐	Name Last, First	Email Address	Role	Department	Access Status	Date Access Expires ↓
☐	Riehl, Donna	donna.p.riehl@kp.org	Medical Records Dept Contact		Active	12/31/9999
☐	Nguyen, Lanae	lanae.x.nguyen@kp.org	Not Selected		Active	12/31/9999
☐	Sposato, Eileen	Eileen.X.Sposato@kp.org	Not Selected		Active	12/31/9999
☐	Solidum, Allan	allan.Lsolidum@kp.org	Medical Records Dept Contact		Active	12/31/9999
☐	Kolehmainen, Alicia	alicia.estela@kp.org	Medical Records Dept Contact		Active	12/31/9999
☐	Izaguirre, Darlene	darlene.izaguirre@kp.org	Not Selected	Lab	Active	12/26/2029
☐	Test, Jennifer	1234@test.com	OST - Staff	HIM	Active	08/25/2026

Demonstration



DEMONSTRATION

Updating Existing User Information

This demonstration will include:

- Updating a user profile
- Completing required fields in the user profile
- Confirming the user has been saved

Takeaways – Updating Existing User Information

In this session, we reviewed how to:

- Edit, correct or updated user details
- Identify editable fields
- Save changes to user details



Topic 4: Extending User Access

Extend access for OST Portal Users

Extending User Access (1 of 3)

On the Manage OST Users screen, select **one or more users** to which you would like to extend access. Click **Extend Access**.

MANAGE OST USERS

[Dashboard](#) | [Manage OST Users](#)

K497 - KAISER-SAN DIEGO

Manage OST Users

+ Add New User

☐	Name Last, First	Email Address	Role	Department	Access Status	Date Access Expires ↓
☒	Test, Jennifer	1234@test.com	OST - Staff	HIM	Active	06/18/2026
☐	Janeria, Die	dia@mailinator.com	OST - Staff	Well Baby Clinic	Active	06/14/2026
☐	Janeria, Diagnosis	dia1@mailinator.com	OST - Staff	Regular Nursery	Active	06/14/2026
☐	One, Uma	uma@mailinator.com	OST - Lead		Active	06/02/2026
☐	User, Testing	testostuser554@mailinator.com	OST - Lead		Active	06/02/2026
☐	Raju Test, OST Test	testostuser@mailinator.com	OST - Lead		Active	05/31/2026

Extend Access Remove Selected

Extending User Access (2 of 3)

Read the confirmation message. Access will be extended to 180 days from today's date. Click **OK**.

K497 - KAISER-SAN DIEGO

Manage OST Users

[+ Add New User](#)

☐	Name Last, First	Email Address	Role	Department	Access Status	Date Access Expires ↓
☒	Test, Jennifer	1234@test.com	OST - Lead	HIM	Active	06/18/2026
☐	Janeria, Die	dia@mailinator.com	OST - Staff	Well Baby Clinic	Active	06/14/2026
☐	Janeria, Diagnosis					06/14/2026
☐	One, Uma					06/02/2026
☐	User, Testing					06/02/2026
☐	Raju Test, OST Test	testostuser@mailinator.com	OST - Lead		Active	05/31/2026

[Extend Access](#) [Remove Selected](#)

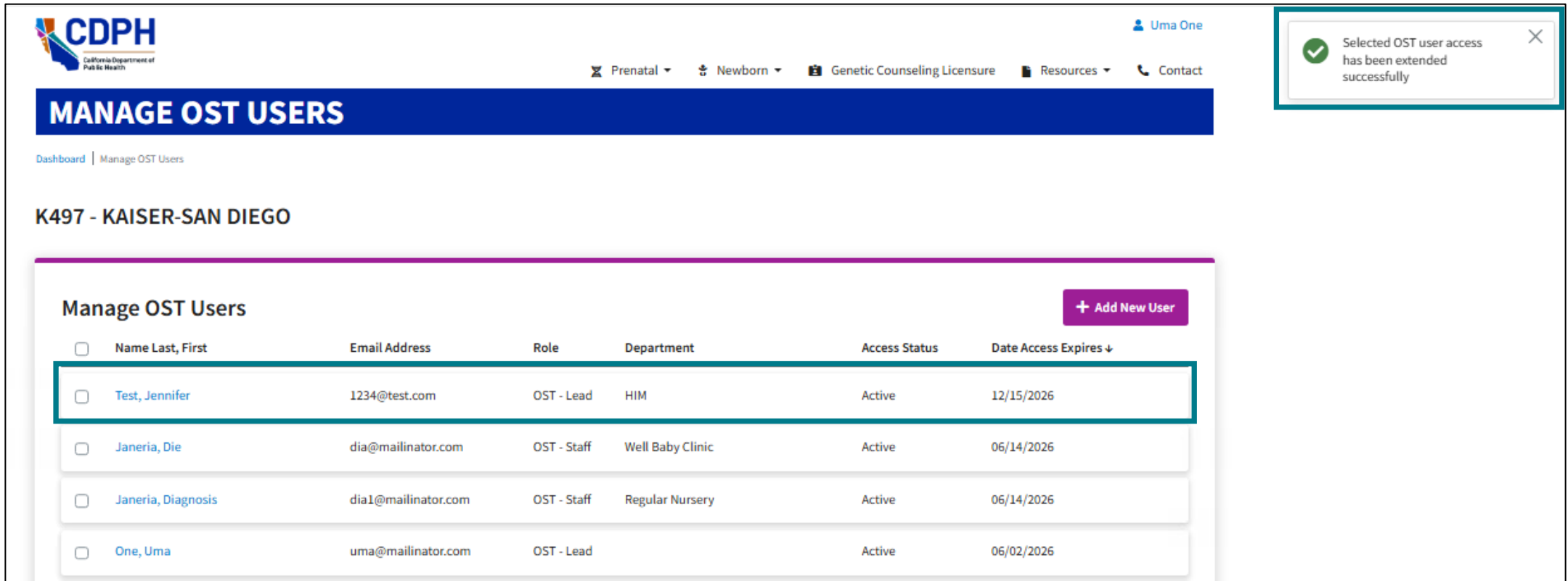
Extend Access for the selected user(s)?

Pressing 'OK' will extend access to 180 Days from today's date for the selected user(s).

OK

Extending Users Access (3 of 3)

Return to the **Manager OST User** screen to confirm access has been extended for the user. There will be a confirmation message at the top right of the screen.



The screenshot displays the CDPH (California Department of Public Health) interface for managing OST (On-Site Training) users. At the top, the CDPH logo is on the left, and navigation links for Prenatal, Newborn, Genetic Counseling Licensure, Resources, and Contact are on the right. A user profile for 'Uma One' is also visible. A blue banner at the top reads 'MANAGE OST USERS'. Below this, a breadcrumb trail shows 'Dashboard | Manage OST Users'. The main heading is 'K497 - KAISER-SAN DIEGO'. A purple box titled 'Manage OST Users' contains a table of users and an 'Add New User' button. A confirmation message in the top right corner states: 'Selected OST user access has been extended successfully'. The table lists four users: Jennifer Test (OST - Lead, HIM, Active, expires 12/15/2026), Die Janeria (OST - Staff, Well Baby Clinic, Active, expires 06/14/2026), Diagnosis Janeria (OST - Staff, Regular Nursery, Active, expires 06/14/2026), and Uma One (OST - Lead, Active, expires 06/02/2026). The first row is highlighted with a green border.

CDPH California Department of Public Health

Prenatal Newborn Genetic Counseling Licensure Resources Contact

Uma One

MANAGE OST USERS

Dashboard | Manage OST Users

K497 - KAISER-SAN DIEGO

Manage OST Users + Add New User

☐	Name Last, First	Email Address	Role	Department	Access Status	Date Access Expires ↓
☐	Test, Jennifer	1234@test.com	OST - Lead	HIM	Active	12/15/2026
☐	Janeria, Die	dia@mailinator.com	OST - Staff	Well Baby Clinic	Active	06/14/2026
☐	Janeria, Diagnosis	dia1@mailinator.com	OST - Staff	Regular Nursery	Active	06/14/2026
☐	One, Uma	uma@mailinator.com	OST - Lead		Active	06/02/2026

Demonstration



DEMONSTRATION

Extending User Access

This demonstration will include:

- Extending user access
- Confirming user access has been extended

Takeaways – Extending User Access

In this session, we reviewed how to:

- Extend access to a user
- Explain the rules for 180-day extension
- Confirming the user has been saved



Topic 5: Removing User Access

Remove access for OST Portal Users

Removing User Access (1 of 3)

On the Manage OST Users screen, select **one or more users** to which you would like to remove access. Click **Remove Selected**.

MANAGE OST USERS

[Dashboard](#) | [Manage OST Users](#)

K497 - KAISER-SAN DIEGO

Manage OST Users

+ Add New User

☐	Name Last, First	Email Address	Role	Department	Access Status	Date Access Expires ↓
☒	Test, Jennifer	1234@test.com	OST - Staff	HIM	Active	06/18/2026
☐	Janeria, Die	dia@mailinator.com	OST - Staff	Well Baby Clinic	Active	06/14/2026
☐	Janeria, Diagnosis	dia1@mailinator.com	OST - Staff	Regular Nursery	Active	06/14/2026
☐	One, Uma	uma@mailinator.com	OST - Lead		Active	06/02/2026
☐	User, Testing	testostuser554@mailinator.com	OST - Lead		Active	06/02/2026
☐	Raju Test, OST Test	testostuser@mailinator.com	OST - Lead		Active	05/31/2026

Extend Access

Remove Selected

Removing User Access (2 of 3)

Read the confirmation message. Click **OK**.

The screenshot shows a web application interface for managing users. At the top, there's a header 'Manage OST Users' and a button '+ Add New User'. Below this is a table with columns: Name Last, First, Email Address, Role, Department, Access Status, and Date Access Expires. The table contains six rows of user data. A modal dialog box is open in the center, titled 'Remove selected user(s)?'. It contains the text: 'Pressing 'OK' will prevent the selected user(s) from accessing the Online Specimen Tracking screens for the current facility.' At the bottom of the dialog are two buttons: 'Cancel' and 'OK'. The 'OK' button is highlighted with a red square. At the bottom of the main interface, there are two buttons: 'Extend Access' and 'Remove Selected'.

☐	Name Last, First	Email Address	Role	Department	Access Status	Date Access Expires ↓
☒	Test, Jennifer	1234@test.com	OST - Lead	HIM	Active	06/18/2026
☐	Janeria, Die	dia@mailinator.com	OST - Staff	Well Baby Clinic	Active	06/14/2026
☐	Janeria, Diagnosis					06/14/2026
☐	One, Uma					06/02/2026
☐	User, Testing					06/02/2026
☐	Raju Test, OST Test					05/31/2026

Remove selected user(s)?

Pressing 'OK' will prevent the selected user(s) from accessing the Online Specimen Tracking screens for the current facility.

Cancel OK

Extend Access Remove Selected

Removing User Access (3 of 3)

Return to the Manager OST User screen to confirm the user has been removed. There will be a confirmation message at the top right of the screen.

California Department of Public Health

Uma One

Prenatal ▾Newborn ▾Genetic Counseling LicensureResources ▾Contact

MANAGE OST USERS

[Dashboard](#) | [Manage OST Users](#)

K497 - KAISER-SAN DIEGO

Manage OST Users

+ Add New User

☐	Name Last, First	Email Address	Role	Department	Access Status	Date Access Expires ▾
☐	Janeria, Die	dia@mailinator.com	OST - Staff	Well Baby Clinic	Active	06/14/2026
☐	Janeria, Diagnosis	dia1@mailinator.com	OST - Staff	Regular Nursery	Active	06/14/2026
☐	One, Uma	uma@mailinator.com	OST - Lead		Active	06/02/2026
☐	User, Testing	testostuser554@mailinator.com	OST - Lead		Active	06/02/2026
☐	Raju Test, OST Test	testostuser@mailinator.com	OST - Lead		Active	05/31/2026

✓

Selected user(s) were successfully removed from K497 - KAISER-SAN DIEGO.

✕

OST Portal Access Reminders

- Default access for a new user is 180 days for OST staff.
- Access can only be extended by the OST lead.
- Default for an extension is for 180 days.
- There is no limit to the number of times access is extended.
- If a user's access expires, their name stays on the list as 'Inactive'.
- Email notifications are sent to OST lead and OST staff for extension.

Demonstration



DEMONSTRATION

Removing User Access

This demonstration will include:

- Remove user access
- Confirming user access has been removed

Takeaways – Removing User Access

In this session, we reviewed how to:

- Remove user access
- Confirming the user access has been removed



Knowledge Check

Questions for review and discussion

Knowledge Check Question 1

User access will be extended to _____ days from the date the extension was entered into the OST Portal.

- A** 180
- B** 90
- C** 30
- D** 60



Knowledge Check Answer 1

User access will be extended to _____ days from the date the extension was entered into the OST Portal.

A

180

B

90

C

30

D

60



Knowledge Check Question 2

True or False? When extending user access, you can only select one user at a time?

- A True**
- B False**



Knowledge Check Answer 2

True or False? When extending user access, you can only select one user at a time.

A True

B False



Knowledge Check Question 3

When adding a new user, which field is required to be completed in the user profile?

- A** Role
- B** Department
- C** Email
- D** All of the above



Knowledge Check Answer 3

When adding a new user, which field is required to be completed in the user profile?

- A** Role
- B** Department
- C** Email
- D** All of the above



Wrap-up and Q&A

Recap learning objectives and clarifying questions

Course Summary

You should now be able to:

- Navigate to the Manage OST Users screen within the OST Portal
- Add a new OST Portal user
- Update information for an existing user
- Extend user access
- Remove user access



Resources

When the system goes live, you'll be able to click the **Resources** dropdown menu to locate resources related to the topics covered in this training.

The screenshot displays the CDPH Online Specimen Tracking web application. At the top left is the CDPH logo (California Department of Public Health). The top navigation bar includes links for 'Training Testing' and 'Manage OST Users'. Below this is a secondary navigation bar with dropdown menus for 'Prenatal', 'Newborn', 'Genetic Counseling Licensure', 'Resources' (which is highlighted with a red box), and 'Contact'. A large blue banner reads 'ONLINE SPECIMEN TRACKING'. Below the banner, there are links for 'Dashboard' and 'Received Specimen'. The main content area shows 'R777 - STANFORD/LUCILE PACKARD CHILDREN'S HOSPI' with a 'Change Facility' link. Below this are tabs for 'Received TRFs', 'Compliance', and 'Missing Specimens'. The 'Received TRFs' tab is active, showing a section titled 'Received TRFs By NAPS Lab' with a note: 'Confirm all items below within 7 calendar days of birth.' At the bottom, there is a search bar labeled 'Search Newborns By' and a 'Show Search' button.

CDPH
California Department of Public Health

Training Testing | Manage OST Users

Prenatal ▾ Newborn ▾ Genetic Counseling Licensure Resources ▾ Contact

ONLINE SPECIMEN TRACKING

Dashboard | Received Specimen

R777 - STANFORD/LUCILE PACKARD CHILDREN'S HOSPI [Change Facility →](#)

Received TRFs Compliance Missing Specimens

Received TRFs By NAPS Lab

Confirm all items below within 7 calendar days of birth.

Search Newborns By [Show Search](#)

- PNS GA Calculator
- PNS cfDNA/MSAFP Forms
- PNS Patient Booklet
- PNS Orders & Results User Guide
- NBS Results User Guide
- OOH, Outcomes and GCL Information