



Introduction to the OST Portal

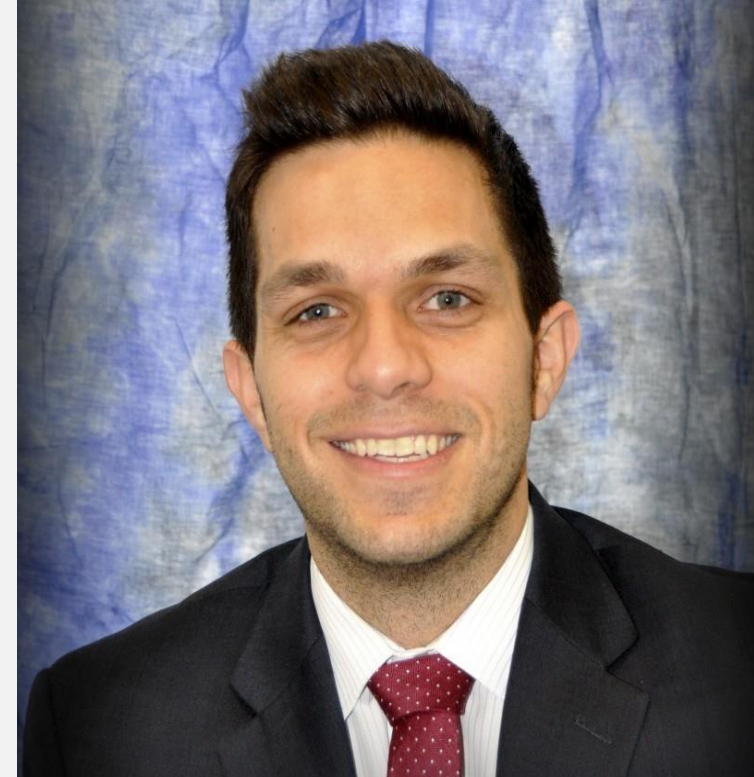
March 10, 2026

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, football, etc.)



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 session—we will not be covering those in detail today.
- As we review the material, **please note any questions related to your specific role or Standard Operating Procedures (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.

Agenda

Introduction

- ✓ **Section 1:** What's Changing?
 - ✓ **Section 2:** What to Expect & How to Navigate the OST Portal
 - ✓ **Section 3:** Where Can I Find Support & Resources?
-

Topic 1: What's Changing?

Overview of key system changes, visual preview of new interface

Overview of the OST Portal

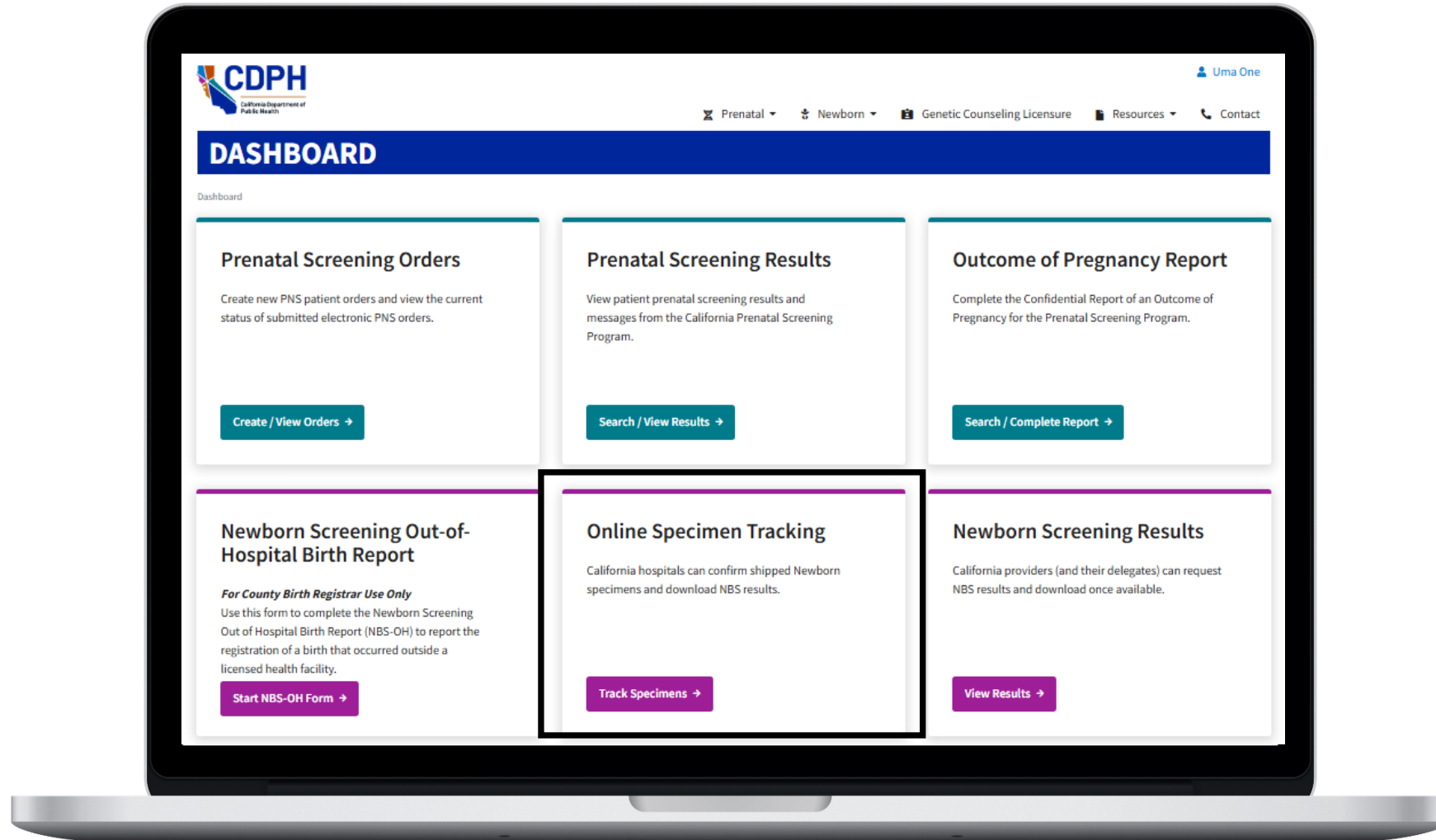
Introduction

This update introduces a new platform with a different look and navigation, while keeping core workflows in place.

Key Differences to Expect

- OST will use a new portal application. This new system is accessible on any device/machine, which will help users complete their confirmations more conveniently.
- OST Leads can onboard new staff without requiring GDSP approval for new accounts and users.

Online Specimen Tracking Tile



Sign-In Screen



California Department of
Public Health



Sign in with a CDPH or GDSP user account



CDPH or GDSP
Sign in →

OR

Sign in with your existing account

Email Address

Password [Forgot your password?](#)

[Sign in](#)

Don't have an account? [Sign up now](#)

Welcome to the OST Portal



California Department of
Public Health

Sign In | Register

Resources ▾ Contact

WELCOME TO CALGENETIC PORTAL

Our Mission

is to serve the people of California by reducing the emotional and financial burden of disability and death caused by genetic and congenital disorders. GDSP is able to accomplish this goal by providing timely screening and follow-up services to pregnant individuals and newborns throughout the state.

Services of the CalGenetic Portal:

Genetic Counselor License

- Apply, renew, and maintain your genetic counselor license

Prenatal Screening (PNS) Program

- Create orders through the California PNS Program and view the current status of submitted electronic PNS orders
- View PNS results and messages from the PNS Program
- Submit a PNS Confidential Report of an Outcome of Pregnancy - CDPH Form 4452

Newborn Screening (NBS) Program

- Submit NBS requests and download NBS results
- Complete and submit an Out-of-Hospital Birth Report (NBS-OH) - CDPH Form 4460
- Perform online specimen tracking (OST) of shipped NBS specimens and download NBS results once available.



Register/Sign in to Your Account

If you are a new or returning user please create or sign in to your CDPH account.

Register / Sign In →

Select Facility

Prenatal

Newborn

Genetic Counseling Licensure

Resources

Contact

SELECT FACILITY

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

Select Facility

Facility

J283 - Aspiring Birth Midwifery - OST - Lead

Continue →

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

Before you proceed, please make sure you acknowledge the following:

This is a State of California computer system that is for official use by authorized users and is subject to being monitored and/or restricted at any time. Unauthorized or improper use of this system may result in administrative disciplinary action and/or civil and criminal penalties. By continuing to use this system, you indicate your awareness of and consent to these terms and conditions of use. LOG OFF IMMEDIATELY if you are not an authorized user or you do not agree to the conditions stated in this warning.

Cancel

Proceed

 CDPH

Topic 2: What to Expect & How to Navigate the OST Portal

How day-to-day tasks or workflows will be impacted

What to Expect in the OST Portal

- Changes in how certain tasks appear, such as viewing lists, reviewing test results and actions tied to records
- Clear status view of TRFs
- Comprehensive OST compliance reporting
- Online downloading of mailer results
- Facilities manage OST user enrollment, extensions and inactivations
- Search filters for different functions (TRFs, missing specimens, mailers)

OST Staff View

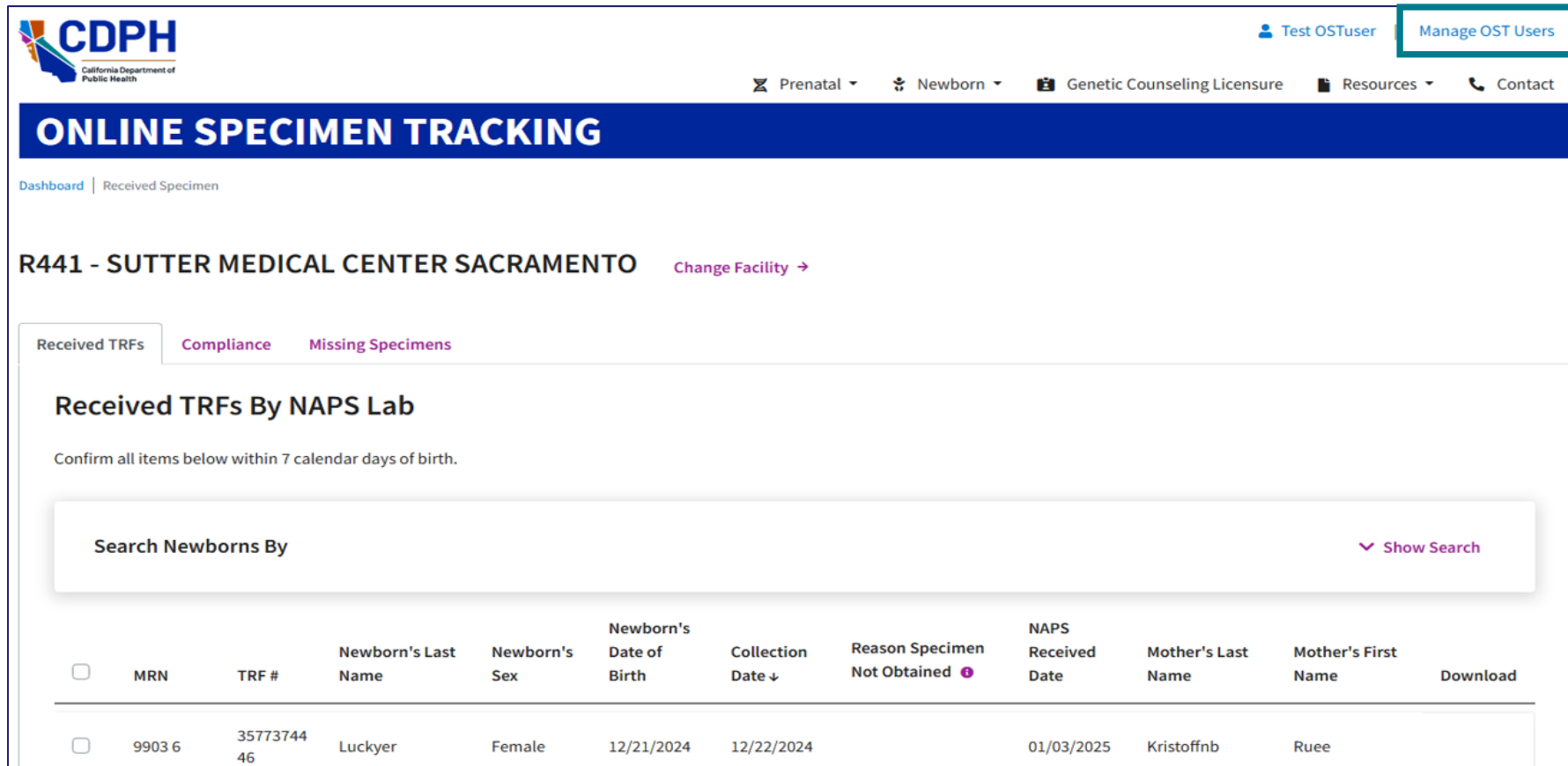
For OST Staff, the default screen displays the **Received TRFs** tab, which displays a list of unconfirmed specimens.

The screenshot displays the CDPH Online Specimen Tracking interface. 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 'Test OSTuser' is in the top right corner. Below the navigation bar is a blue header with the text 'ONLINE SPECIMEN TRACKING'. Underneath, a breadcrumb trail shows 'Dashboard' and 'Received Specimen'. The main content area is titled 'R041 - CONTRA COSTA REGIONAL MEDICAL CENTER' with a 'Change Facility' link. A tabbed interface shows 'Received TRFs' as the active tab, with 'Compliance' and 'Missing Specimens' as other options. The 'Received TRFs By NAPS Lab' section includes a note: 'Confirm all items below within 7 calendar days of birth.' Below this is a search bar labeled 'Search Newborns By' with a 'Show Search' button. A table lists specimen data with columns for MRN, TRF #, Newborn's Last Name, Newborn's Sex, Newborn's Date of Birth, Collection Date, Reason Specimen Not Obtained, NAPS Received Date, Mother's Last Name, Mother's First Name, and a Download link. One specimen is listed with MRN 9992 2, TRF # 35870804 84, and other details.

☐	MRN	TRF #	Newborn's Last Name	Newborn's Sex	Newborn's Date of Birth	Collection Date ↓	Reason Specimen Not Obtained ⓘ	NAPS Received Date	Mother's Last Name	Mother's First Name	Download
☐	9992 2	35870804 84	Jaqdo	Not Provided	12/21/2024	12/22/2024		01/03/2025	Robin Hoodip	Milfoirf	

OST Lead View

For OST Leads, the **Manage OST User** option is on the top right.



The screenshot displays the CDPH Online Specimen Tracking interface. At the top right, the 'Manage OST Users' link is highlighted with a red box. The main content area shows the 'Received Specimen' tab for 'R441 - SUTTER MEDICAL CENTER SACRAMENTO'. Below this, the 'Received TRFs By NAPS Lab' section includes a search bar and a table of received TRFs. The table has columns for MRN, TRF #, Newborn's Last Name, Newborn's Sex, Newborn's Date of Birth, Collection Date, Reason Specimen Not Obtained, NAPS Received Date, Mother's Last Name, Mother's First Name, and a Download link. A single row of data is visible for a newborn named Luckyer.

CDPH California Department of Public Health

Test OSTuser **Manage OST Users**

Prenatal Newborn Genetic Counseling Licensure Resources Contact

ONLINE SPECIMEN TRACKING

Dashboard | Received Specimen

R441 - SUTTER MEDICAL CENTER SACRAMENTO [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](#)

☐	MRN	TRF #	Newborn's Last Name	Newborn's Sex	Newborn's Date of Birth	Collection Date ↓	Reason Specimen Not Obtained ⓘ	NAPS Received Date	Mother's Last Name	Mother's First Name	Download
☐	9903 6	35773744 46	Luckyer	Female	12/21/2024	12/22/2024		01/03/2025	Kristoffnb	Ruee	

Manage OST Users Screen

OST Leads have access to the **Manage OST Users** screen.

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

☐	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
☐	Uma, One	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

From this screen, OST Leads can:

- Add new users
- Update user information
- Extend user access
- Remove user access

Search Tools

There are several filters to help narrow your **Received TRF** search.

Received TRFs

Compliance

Missing Specimens

Received TRFs By NAPS Lab

Confirm all items below within 7 calendar days of birth.

Search Newborns By

Hide Search

Filter Confirmation Status

☐ Unconfirmed ☐ Confirmed ☐ Results Available

Mother's Last Name

Mother's First Name

Baby's Last Name

Baby's Sex

Baby's Date of Birth

mm/dd/yyyy

Birth Date Range

MRN

NBS TRF

Specimen Collection Date

mm/dd/yyyy

Collection Date Range

NAPS Received Date

mm/dd/yyyy

Reset

Search

Mark As Confirmed

Mark As Confirmed = Confirming a received TRF & accompanying specimen came from your facility (shipped from facility to newborn screening laboratory).

☒	279140 72	356460 1293	VALLE	Female	01/15/2026	01/17/2026	01/18/2026	VALLE	JAZMYN
☒	279140 75	356460 1314	GASSNER	Male	01/16/2026	01/17/2026	01/18/2026	GASSNER	KENDALL
☒	279140 74	356460 1182	PRADO	Male	01/16/2026	01/17/2026	01/18/2026	PRADO	KATHRYN
☐	279140 80	359402 0510	VAUGHN	Male	01/16/2026	01/17/2026	01/18/2026	VAUGHN	CANDICE

☒ Mark As Confirmed

Results for Specimens confirmed at this facility are typically available for download 14 days after birth. Table data refreshed 1/22/2026 9:55:08 PM.

Downloading Results

Within the Received TRF tab, the results PDF will be available for download about 14 days after birth. Click the **Download** icon to access the document.

☐	MRN	TRF #	Newborn's Last Name	Newborn's Sex	Newborn's Date of Birth	Collection Date ↓	Reason Specimen Not Obtained ⓘ	NAPS Received Date	Mother's Last Name	Mother's First Name	Download
☐	27914086	3594021176	LUNDY	Female	01/17/2026	01/19/2026		01/20/2026	LUNDY	SHAVONE	
☐		7732090890	Russel Test	Female	12/19/2025	12/19/2025		12/23/2025	Runte Test	Sheri Test	⬇
☐	27913727	3594019941	JIMENEZ	Male	12/14/2025	12/15/2025		12/16/2025	JIMENEZ	JAKELYNE	⬇
☐	27913726	3594020052	CORONA	Male	12/14/2025	12/15/2025		12/16/2025	CORONA	VIANCA	⬇
☐	27913722	3564590386	HOSKINS	Male	12/13/2025	12/14/2025		12/15/2025	HOSKINS	ASPYN	⬇
☐	27913717	3594019615	PACIFICO	Female	12/13/2025	12/14/2025		12/15/2025	PACIFICO	JORECCA	⬇
☐	27913725	3564590955	DARDEN	Male	12/13/2025	12/14/2025		12/15/2025	DARDEN	TABITHA	⬇
☐	27913719	3594019726	GARCIA	Female	12/13/2025	12/14/2025		12/15/2025	GARCIA	OLIVIA	⬇

Indicates results are available for download

Report as 'Not Our Patient'

A TRF marked '**Not Our Patient**' is a TRF which appears on your facility's 'Received TRFs by NAPS Lab' list but was not initiated by your facility.

☐	MRN	TRF #	Newborn's Last Name	Newborn's Sex	Newborn's Date of Birth	Collection Date ↓	Reason Specimen Not Obtained ⓘ	NAPS Received Date	Mother's Last Name	Mother's First Name	Download
☐		7132476033	Stoltenberg	Not Provided	09/13/2025	09/14/2025		09/07/2025	Veum	Rowan	
☐	MR738782	2592595344	JOHN	Male	09/07/2025	09/08/2025		08/31/2025	EMMA	ALEE	
☐		1356258255	Champlin	Not Provided	09/04/2025	09/06/2025		09/07/2025	Jakubowski	Katlyn	
☒		2382541424	ALEN	Male	09/01/2025	09/02/2025		08/31/2025	ALEXA	ava	
☐		7262024161	Morar	Not Provided	07/28/2025	07/29/2025		08/03/2025	Friesen	Emmett	
☒ Mark As Confirmed ☒ Report As Not Our Patient											

Results for Specimens confirmed at this facility are typically available for download 14 days after birth. Table data refreshed 1/13/2026 11:59:26 PM.

Compliance Tab

The **Compliance** tab displays a list view of out of compliance specimens.

Received TRFs Compliance Missing Specimens

Out of Compliance Specimens

Specimens must be confirmed or reported missing within 7 days of birth. Specimens that are confirmed outside of this time range are considered out of compliance and are viewable on the downloadable report.

[Download Compliance Report ↓](#)

Month ↓	Total Specimens	# Specimens Confirmed on Time	# Out of Compliance	Compliance Rate %	Total Missing Specimens Reported	# Missing Specimens Reported on Time	# Missing Specimens Reported Late
August	352	0	352	0	0	0	0
December	201	6	195	2	0	0	0
July	363	0	363	0	0	0	0
November	118	0	118	0	0	0	0
October	339	0	339	0	0	0	0
September	288	0	288	0	0	0	0

Click here to download the Compliance Report

Missing Specimens Tab

The **Missing Specimens** tab displays a list view of missing specimens that the facility has initiated.

Missing Specimens

[+ New Missing Specimen Report](#)

Filter Results By [Show Filters](#)

☐	Report ID ↓	TRF #	Status	MRN	Mother's Name	Newborn's Lastname	DOB	Reported Date	Resolved Date	Reason for Delay
☐	MS0001004	3512345624	Draft		Shin, May	Lara	12/09/2025	12/09/2025		
☐	56054		Unmatched	27682863		GONZALEZ	10/27/2023	11/03/2023	11/08/2023 12:00 AM	
☐	55974		Unmatched	27673687		HEMPEL	10/11/2023	10/17/2023	10/20/2023 12:00 AM	
☐	55950		Unmatched	27673631		Glovinsky	10/06/2023	10/11/2023	10/16/2023 12:00 AM	
☐	55940		Unmatched	27673560		CAMACHO	09/30/2023	10/09/2023	10/12/2023 12:00 AM	

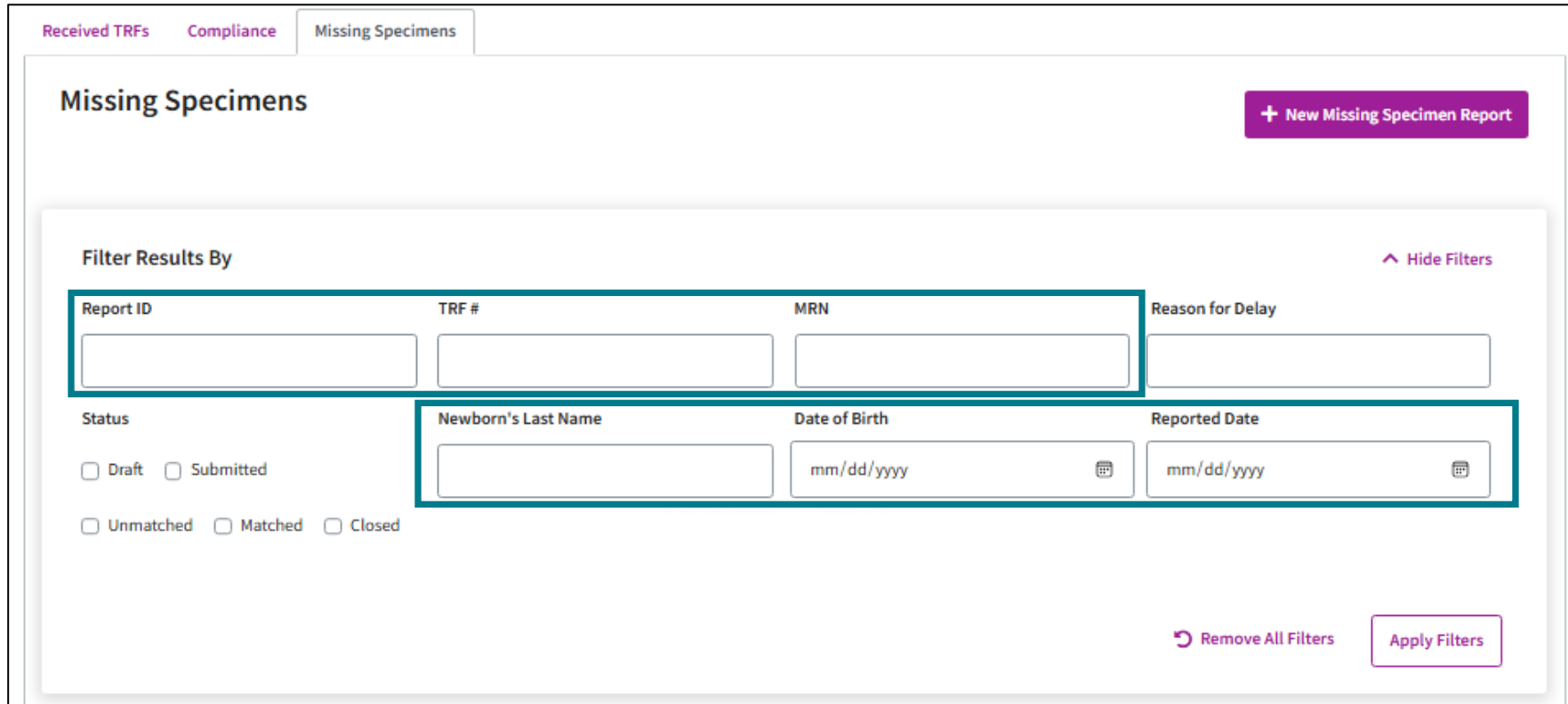
Date missing specimen report was submitted

Click to create a new missing specimen report

Date missing specimen report was closed

Missing Specimens Search

There are several filters to help narrow your **Missing Specimens** search.



The screenshot displays the 'Missing Specimens' search interface. At the top, there are three tabs: 'Received TRFs', 'Compliance', and 'Missing Specimens'. A purple button labeled '+ New Missing Specimen Report' is located in the top right corner. Below the tabs, the title 'Missing Specimens' is displayed. A 'Filter Results By' section contains several input fields and checkboxes. Two red boxes highlight specific filter groups: the first box encloses the 'Report ID', 'TRF #', and 'MRN' text input fields; the second box encloses the 'Newborn's Last Name' text input field, the 'Date of Birth' date picker, and the 'Reported Date' date picker. Other visible filters include 'Reason for Delay', 'Status' (with checkboxes for Draft, Submitted, Unmatched, Matched, and Closed), and a 'Hide Filters' link. At the bottom right, there are buttons for 'Remove All Filters' and 'Apply Filters'.

Received TRFs Compliance **Missing Specimens**

Missing Specimens [+ New Missing Specimen Report](#)

Filter Results By [^ Hide Filters](#)

Report ID TRF # MRN Reason for Delay

Status

☐ Draft ☐ Submitted

☐ Unmatched ☐ Matched ☐ Closed

Newborn's Last Name Date of Birth Reported Date

mm/dd/yyyy mm/dd/yyyy

[Remove All Filters](#) [Apply Filters](#)

Demonstration



DEMO

Intro to OST Portal for OST Users

This demonstration will include how to:

- Log in to the OST Portal
- Navigate to the Received TRFs list view
- Navigate to the Compliance list view
- Navigate to the Missing Specimens list view

Topic 3: Where Can I Find Support & Resources?

Upcoming training, FAQs, communication channels
for ongoing updates and feedback

Training Approach

Phase	Before Go-Live			After Go-Live	
Timing	March	April	May	June	July
Approach	• Introductory webinar • Virtual instructor-led sessions	• Virtual instructor-led sessions	• Additional support materials	• Additional virtual sessions and materials	• Additional virtual sessions and materials
Summary	• Virtual instructor-led sessions	• Virtual instructor-led sessions	• Virtual instructor-led sessions • User guides and short videos available for offline use	• Virtual instructor-led sessions • User guides and short videos available for offline use	• Virtual instructor-led sessions • User guides and short videos available for offline use

Training FAQs (1 of 3)

1) When is go-live?

Go-live (May 18, 2026) is when we begin using NBS SIS 2.0 and the OST Portal for day-to-day work.

2) What training is available for my role?

Training is role-based. You'll be invited to the instructor-led sessions that match the tasks you perform in the system.

3) Where do I find the training schedule?

The training schedule is in the [“Wrap-Up”](#) section of this presentation. Training invitations will be shared via email.

Training FAQs (2 of 3)

4) What if I can't attend my scheduled session?

Each session has two day/time options. You may attend an alternate session or complete the recorded/on-demand version.

5) Are recordings available?

Yes. Recordings will be available prior to go-live, along with the slide deck.

6) How long will training take?

OST virtual instructor-led training sessions will be 30-60 minutes.

Training FAQs (3 of 3)

7. Who are my Change Champions?

Refer to the [Appendix](#).

8.) How can I provide training feedback?

You can share feedback by completing the post-session survey link shared at the end of each session.

Wrap-Up

Training schedule review

OST Training Schedule: March (PST)*

Week 1	March 9-13				
Day	Mon	Tues	Wed	Thurs	Fri
All OST Users		Webinar (1 PM)			
Week 2	March 16-20				
Day	Mon	Tues	Wed	Thurs	Fri
All OST Users					Course 1 (10 AM)
Week 3	March 23-27				
Day	Mon	Tues	Wed	Thurs	Fri
All OST Users		Course 2 (1 PM)			Course 1 (Alt) (10 AM) Course 2 (Alt) (2 PM)

OST Training Schedule: March-April (PST)*

Week 4	March 30 – April 3				
Day	Mon	Tues	Wed	Thurs	Fri
All OST Users	Course 3 (10 AM)			Course 3 (Alt) (1 PM)	

Week 5	April 6-10				
Day	Mon	Tues	Wed	Thurs	Fri
OST Leads	Course 4 (11 AM)		Course 4 (Alt) (2 PM)		

Appendix



Change Champion Contact Information

Prior to go-live, please direct questions to your **Change Champion(s)** or the **NBS SIS mailbox (NBSSIS2.0@cdph.ca.gov)**. After migration, you'll have a designated point of contact for ongoing questions. Details coming soon!

Name	Email
Merry Parrish	merry.parrish@cdph.ca.gov
Chris Cornwell	chris.cornwell@cdph.ca.gov