Navigating the Baby-Friendly USA Portal

More than a million babies each year off to a great start
The Baby-Friendly USA (BFUSA) portal is the “back end” of the website. The portal is a secured area of the website where only registered facilities working in the 4-D Pathway or Designated may access phase materials and tools.

To access the portal, you must login.
To have login access you must be a **registered user** for your facility.

This means BFUSA has been provided with your specific, facility-branded email address and you have been officially issued a login password by us.
Registered users are established in the Discovery Phase (D1) when the Discovery Registration Form is submitted & accepted.
Registered Users

Each facility must have a minimum of 2 users at all times. You are allowed a maximum of 3 users.

Common Questions:
• What are the different user roles?
• What are the different privileges associated with each role?
• Who should we choose to be a user?
• What if I need to change a registered user?
• What if I forget my login password?
Registered Users

User Roles:

**Primary User:** This individual is considered to be your facility’s primary Baby-Friendly contact. The Primary User also has advanced privileges; because of this, it is pertinent that you always maintain an active Primary User.

*What are the additional privileges?* The Primary User can submit the Facility Data Sheet, Self-Appraisal Survey, and edit the Facility Details page in the portal.

**Secondary User:** The Secondary User has access to all of the same tools and materials as the Primary User. However, the Secondary User can only enter data to online forms, they cannot submit the form.

**Alternate User:** This role is optional and shares all of the same privileges as the Secondary User. They may enter data to forms in the portal but do not have the ability to submit.
Registered Users

Things to Consider:

When appointing registered users, consider the following:

Those identified as registered users will have access to all phase tools and materials located in the portal. They will be responsible for:

• Ensuring all required phase work is completed and submitted to Baby-Friendly USA per the indicated timeline
• Monitoring deadlines
• Tracking expiration dates
• Ensuring timely payment of all fees

These individuals will be the main point of contact between BFUSA and your facility. Please keep this in mind when deciding who should have login access to the portal.
Changing Users

User Changes:

Only BFUSA staff can add/remove/change a registered user. To authorize this change, you must do the following:

1. Complete and submit a User Change Form. This is located on the Dashboard in the portal under DO #1.
   a) Once this form is processed, new users will receive an email from BFUSA containing a password and login instructions.

2. Following submission of the User Change Form, the Primary User should edit the Facility Details page in the portal to update the contact information for the user that has changed.

NOTE: Just changing the Facility Details page in the portal will not facilitate any change within the system unless a User Change Form is also submitted.
Once portal access has been successfully established, you will want to login:

From the BFUSA home page, click “PORTAL.”
Logging In

You are now on the sign in page

SIGN IN

IMPORTANT NOTICES

1. October 17, 2018: Website updates will be taking place throughout the day on the 17th. Access to the website and portal may be temporarily impacted. We apologize if you experience technical issues.

2. August 28, 2018: Several tools have been updated and posted in the following phases in the Baby-Friendly USA portal: Development, Dissemination, Designation, Annual Quality Improvement (AQI) and Re-Designation. Please refer to the specific phases’ NOTICES/UPDATES section of the portal for descriptions of changes.


BFUSA has decided to reinstate the relevant 2010 criteria for Step 9. This specifically applies to criterion 9.1.2 which will now say:

"Observations in the postpartum unit and any well-baby observation areas will indicate that at least 80% of breastfeeding infants are not using bottles, or, if they are, their mothers have been informed of the risks and this education is documented in the medical record.”

Click here for more information.
Important notices are posted to the “Sign In” page. If the BFUSA offices are closed during normal business hours, there are technical difficulties with the website, or Baby-Friendly makes a public statement on a pressing issue, you will be notified about it here.
Note the “Forgot your password?” link.

If you lose or forget your password at any time you may utilize this link to reset your login password. You will be provided with a system-generated email containing instructions on getting a new password.
Logging In

Enter your facility branded email address and password, and click “Sign in.”
You are now logged into the portal and are on the Dashboard.
This above shows what the top of your page will look like immediately following your login.

The **Dashboard** is where all phase materials are housed: tool kits, template documents, guides, phase requirements, submission instructions, and deadlines.
The Dashboard is organized by phase with the facility’s most current phase at the top.

When advancing phases you maintain access to all previous phase tools.

For example: If your facility is currently in the Dissemination Phase you can locate tools from the Development and Discovery Phase by scrolling down on your Dashboard.

Materials for a future phase will not be available until the facility enters into that phase.
The instructions and materials available through the portal for each phase are divided under four headings:

- **LEARN** – Instructions and resources for this phase.
- **DO** – Templates and materials used for phase activities.
- **SUBMIT** – List of items that must be submitted by your facility to BFUSA.
- **REVIEW** – List of items that should be reviewed by your team when you complete your work in this phase.
1. IMPORTANT USER CHANGE INFORMATION:
   A. A User Change Form, signed by the Nurse Manager (or higher level), must be emailed to BFUSA for any change of information pertaining to the Primary, Secondary or Alternate Users.
   I. Typical changes include: deleting a User, adding a User or changing a User email address (which often occurs when a facility merges into a system or changes its name).
   II. If BFUSA does not receive the signed User Change Form, new Users will not receive passwords and login information. To download a User Change Form, please [click here].
   B. In addition to submitting this form, the Primary User must log into the BFUSA portal and make "User" changes online in the Facility Detail. NOTE: The User Change Form applies only to changes for the three User roles.
   C. If your facility needs assistance making these changes, please contact the BFUSA Team.

2. MULTIPLE CASES:
   A. Each case can only have one individual's data stored in the portal.
   B. Each clinical case is assigned to a Facility Detail.
   C. This policy is based on patient privacy requirements.

3. CEO SUPPORT:
   A. Obtain a password reset from the CEO Office.
   B. The CEO Office contact is [info@bab].

4. FACILITY DATA:
   A. Gather information from a black book, facility policy, etc. and enter it in the portal.

LEARN

**Important**: Documents opened through the BFUSA portal may not "close" the same in each User's browser type (Internet Explorer, Google Chrome etc.). Some browsers require you to close a new window or page link by using the back arrow rather than clicking on the "X" in the top right corner of your screen.

1. REGISTERED USERS: Each facility is required to register a minimum of two, maximum of three Users for online access to the Baby-Friendly USA (BFUSA) portal.
   A. User roles include: Primary, Secondary and Alternate.
   I. The Primary User is the only User with privileges to "Submit" BFUSA's web forms through the portal.
   II. This signifies to Baby-Friendly USA verification of the information provided by the facility.
   III. The Secondary and Alternate Users may enter data into BFUSA's web forms on the portal using the "Save Draft" button. Secondary and Alternate Users cannot "Submit" the web forms or data through the portal.

2. IF YOU NEED TO ADD/DELETE/EDIT USER INFORMATION, please see "DO" #1 below to download the form. Updating Users on your Facility Details page WILL NOT automatically provide new Users with access to the portal. You must submit the form.

3. NEW USERS: If you are new to using the Baby-Friendly portal, please [click here] to view a PowerPoint Presentation called Navigating the Portal.

4. DISCOVERY PHASE SUMMARY: For a summary of the Discovery Phase, [click here]

5. HELPFUL INFORMATION: Click [FAQs] and [Pathway Resources] for additional information and presentations.

6. THE INTERNATIONAL CODE OF MARKETING OF BREAST-MILK SUBSTITUTES - [click here] to learn more about this important component of breastfeeding protection.

7. PATIENT DISCHARGE BAGS: For practical tools and solutions to eliminating formula company-sponsored...
SUBMIT will always instruct you on **what**, **when**, **where**, and **how** to submit materials.

SUBMIT - All facilities enrolling in the first year of this Phase on or after July 1, 2016 are required to adhere to the timelines below.

Facilities are expected to **COMPLETE their work** in the Development Phase **AND MOVE** into the Dissemination Phase **within one (1) year**. The outline below will allow all parties to complete the work of the Development Phase within that year.

1. **Anytime**
   - A. User information update form, if applicable – see "DO" #1
   - B. The timeframe for the tasks below are not meant to impede hospitals and birth centers who wish to move faster through the 4-D Pathway. Facilities completing their work early and wishing to move to the next phase sooner than outlined below, may contact BFUSA and request the next phase invoice.

2. **By 9 months of entering the Development Phase**
   - A. Email all of the facility-completed versions of the items below to 4Dsubmission@babyfriendlyusa.org - materials may be submitted individually or at the same time. SUBJECT line of the email MUST say: “D2: Development Submission-Facility Name”
     1. Work Plan Template (DEV3A) – see "DO" #7
     2. Infant Feeding Policy – see "DO" #8
   - B. IMPORTANT: once submissions are reviewed, the facility will receive feedback from Baby-Friendly USA.

3. **By 10 months into the Development Phase**
   - A. If the items above are not received, facilities will be invoiced for a SECOND year fee in the Development Phase.
   - B. Facilities who have submitted all required materials by the specified timeframes will be invoiced for the
Outside the Dashboard

What else should I know about the Baby-Friendly portal?
My BFUSA Menu

Dashboard

MY BFUSA
Dashboard
Facility Details
Settings
ADMINISTRATION
Self Appraisal Survey
Facility Data Sheets
Facility Assessments

DASHBOARD
Number of facilities participating in BFHI: 1081
% of US births being born in BFUSA Hospitals: 26.8%

DISSEMINATION
Welcome to the D3: Dissemination Phase - Please review all components of Learn, Do, Submit, Review for the Dissemination Phase before beginning your work.

NOTICES/UPDATES:
1. October 17, 2018: Website updates will be taking place throughout the day on the 17th. Access to the website and portal may be temporarily impacted. We apologize if you experience technical issues.

The dark purple bar indicates the page you are currently viewing.
The “Settings” tab will allow you to change your password. This should always be done immediately following a password reset via the link on the login page or receiving a password issued by a BFUSA staff member.

These passwords are usually very long and/or temporary and should be changed as soon as portal access is obtained.
The **Facility Details** page can also be accessed through the MY BFUSA menu. This page contains important information that is specific to your facility such as:

- **Facility information**
  - 4-digit Baby-Friendly ID#
  - Facility contact’s
  - Facility demographic information
- **Phase expiration date**
- **Phase history**

The following slides will show you where and how to locate all of these details.
ID Number

Facility Details includes:

• The 4-digit ID assigned to your facility by BFUSA.
Facility Details also include:

- Contact information for your facility’s registered users and administrative staff members such as CNO, CEO, and Director of Maternity
- Other demographic information about your facility

This page should be checked often to ensure the information is accurate and updated appropriately by the Primary User when necessary.
Phase History

Your facility's Phase History is recorded at the very bottom of the Facility Details page.
The Phase History allows you to track your facility’s progress in the 4-D Pathway as well as monitor your expiration date.

The current phase status is listed at the top.

The expiration date is 1 year from the date the facility entered the phase.

<table>
<thead>
<tr>
<th>PHASE HISTORY</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Dissemination</td>
<td>10/05/2018 12:29 PM</td>
</tr>
<tr>
<td>Development</td>
<td>11/10/2017 03:15 PM</td>
</tr>
<tr>
<td>Discovery</td>
<td>10/20/2016 09:37 AM</td>
</tr>
</tbody>
</table>

This facility is in the Dissemination Phase, and will expire on 10/4/2019.
Just below the Phase History you will find a record of the Facility Data Sheets submitted by your facility and the Self Appraisal Survey that is submitted in the Discovery Phase.
Facility Details
Updating Your Contacts

“Now that you know what is on the Facility Details page and where to find it, what do you do if something needs to be updated?"

“Our CEO has retired. How can I update this information in the portal?”

“My facility just merged with a new health system. Do I need to submit anything to Baby-Friendly?”

“What if our Director of Maternity has changed?”

“I noticed our facility was registered with the wrong name. How can I change this?”
The **Primary User** can update the Facility details page by clicking the “action” button located in the upper right hand corner of the page. Then select “Edit Details” from the drop down box.
Facility Details

What can the registered users change?
• Only the Primary User has the ability to update the Facility Details page.
• The Primary User can update the Chief Executive Officer (CEO), Chief Financial Officer (CFO), Chief Nursing Officer (CNO), Director of Maternity, and Billing Contact.

The information for the Primary, Secondary, and Alternate Users can be changed as it appears on the Facility Details page. However, this should not be done unless a User Change Form is also submitted.

What can registered users NOT change?
• Your facility’s name, street address, telephone number, or Health System.

You do not have the ability to add or remove login ability for registered users via the Facility Details page. Only a User Change Form can begin this process.
Important Forms

User Change Form

Always located under DO #1. This form should be submitted any time a registered user must be added/removed/changed. Only BFUSA staff can make these changes so a User Change Form is required for ALL user changes, including a change in email address (change in domain or person’s name).

Facility Changes Form

Always located under DO #2*. This should be submitted in the event of a facility name change, facility merger, physical address change, and/or changes in configuration of premises.

*DO #8 in the Discovery Phase
2. FACILITY CHANGES: Please [click here](#) to download the Facility Changes Form. [Click here](#) for background on types of changes that require the submission of this form. Also complete the [Affiliated Prenatal Services Questionnaire (DISC2)](#) to determine whether the facility’s changes have impacted your status regarding prenatal services.

DO #1

DO #2

These forms may be accessed on the Dashboard in the portal by all registered users (primary, secondary, and alternate) and may be submitted at anytime a change is needed or necessitated.

1. IMPORTANT- USER CHANGE INFORMATION:
   A. A User Change Form, signed by the Nurse Manager (or higher level), must be emailed to BFUSA for any change of information pertaining to the Primary, Secondary or Alternate Users.
      I. Typical changes include: deleting a User, adding a User or changing a User email address (which often occurs when a facility merges into a system or changes its name).
      II. If BFUSA does not receive the signed User Change Form, new Users will not receive passwords and login information. To download a User Change Form, please [click here](#).
   B. In addition to submitting this form, the Primary User must log into the BFUSA portal and make “User” changes online in the Facility Detail. NOTE: The User Change Form applies only to changes for the three User roles.
   C. If your facility has changes to other contacts such as Billing Contact, CEO, etc. the Primary User must also make these changes in the Facility Detail. (See below for instructions on how to change a facility name.)
Helpful Hints

Can’t find what you are looking for on the Dashboard?

Control (Ctrl) + F = This will allow you to search for keywords on the page. For example, can’t find the Affiliated Prenatal Services Questionnaire? Hold the Ctrl+F keys and type “Prenatal” in the field. This will highlight all locations the word “Prenatal” appears on the page, narrowing your search to specific points.

Don’t know who to ask?

Have a question about the GEC? A question about completing the Work Plan? How about phase fees? Did BFUSA receive your check? What do I still have to submit?

If you have any questions and do not know who to direct it to you may email BFUSA at info@babyfriendlyusa.org. An assigned staff member will then assess the nature of your question and forward it appropriately for assistance.
Thank you for the great care you provide to mothers and babies, and good luck on your Baby-Friendly journey!