

NAPHSIS

STEVE 2.0 System Administration Guide

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1. Introduction

This document describes the intended audience, purpose, and scope of this guide.

1.1. Overview

The STEVE 2.0 system represents a significant advance in file size capacity, technical reliability, and security/integrity of vital records file exchange among partners in the NAPHSIS data exchange network.

To maintain continuity and ease of use, STEVE 2.0 has adopted the best practices established in the STEVE 1.0 application and coupled it with a more robust cloud-based data exchange mechanism. Where the STEVE 1.0 functionality was spread among multiple installations, STEVE 2.0 consolidates the back-end operations under a centralized cloud array that enables 24/7/365 monitoring and streamlined troubleshooting capability.

A significant improvement lies in the ability of STEVE 2.0 to automatically verify the integrity of all data files before they are transmitted to partners. If there are any errors, the partner receives notification that enables easy repair of the data file. This also keeps recipient partners from trying and failing to import corrupted or improperly formatted files.

Maintained by Ruvos, LLC in partnership with the Association of Public Health Laboratories (APHL), the APHL Informatics Messaging Services (AIMS) Platform provides hosting and transportation services for STEVE 2.0. Since moving into production in 2008, the AIMS Platform has evolved into a healthcare data exchange hub of national significance. The services offered help facilitate data exchange, translation or transformation, and hosting for more than 80 trading partners, including the Office of the National Coordinator for Health Information Technology (ONC), the Mayo Clinic, Cerner Corporation, Quest Laboratories, Pathology Associates Medical Laboratories (PAML) and in all 50 state public health departments. In addition, the AIMS Platform is being piloted in the DigitalBridge initiative. Incorporating STEVE 2.0 into this existing, highly secure and compliant, environment provides a key component and service towards the progress of true national healthcare data exchange.

1.2. Audience & Purpose

The intended audience for this manual is the System Administrator of the STEVE 2.0 website/application. This person is responsible for initial system setup and configuration and ongoing maintenance and administration. The System Administrator should have a solid understanding of the STEVE 2.0 application, the operational needs of the system users, and an overall understanding of how the system functions in the context of nation-wide information exchange.

This Guide also includes instructions on how to use the STEVE 2.0 system to configure filters and routing rules for file distribution and reception.

1.3. Glossary of Terms and Abbreviations

STEVE	State and Territorial Exchange of Vital Events
HLD	High Level Design
HLDD	High Level Design Document
NAPHSIS	National Association for Public Health Statistics and Information Systems
CDC	Centers for Disease Control and Prevention
NCHS	National Center for Health Statistics
AIMS	APHL Informatics Messaging Services Platform
APHL	Association of Public Health Laboratories
FTE	Full Time Equivalent
SSO	Single Sign On
PHIN MS	Public Health Information Network Messaging System
SAMS	Secure Access Management Services
PHI	Protected Health Information

PII	Personally Identifiable Information
AWS	Amazon Web Services
S3	Simple Storage Service
EBS	Elastic Block Store
SFTP	Secured File Transport Protocol
RDS	Relational Database Service
SES	Simple Email Service
SWF	Simple Workflow Service
SQS	Simple Queue Service
RDS	Relational Database Service
KMS	Key Management Service
IJE	Interjurisdictional Exchange of Vital Records

2. Getting Started

The STEVE 2.0 system is entirely web-based, so there is nothing for you to download or install. Follow the instructions below to go to the STEVE 2.0 home page and start working with the system.

2.1. Sign In

The STEVE 2.0 system login process is the same for users with either Administrator or User permissions.

Follow these steps to sign in to STEVE.

NOTE: System Administrators will receive login credentials from STEVE Support. All other administrators and users will receive credentials from your local System Administrator.

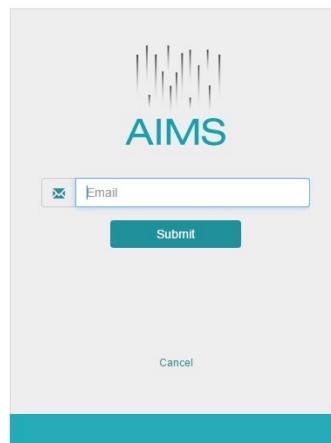
1. Enter the following **address** in your web browser:
<https://www.steve2.org>

The STEVE 2.0 Home Page appears.

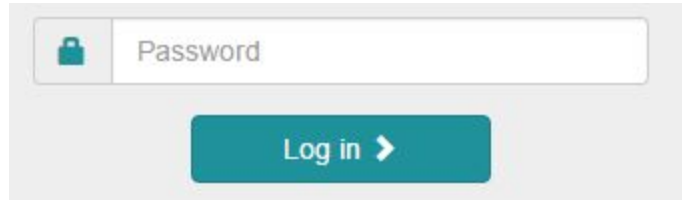
2. Click the **Sign In** button in the top right corner.



The AIMS Sign In screen appears.



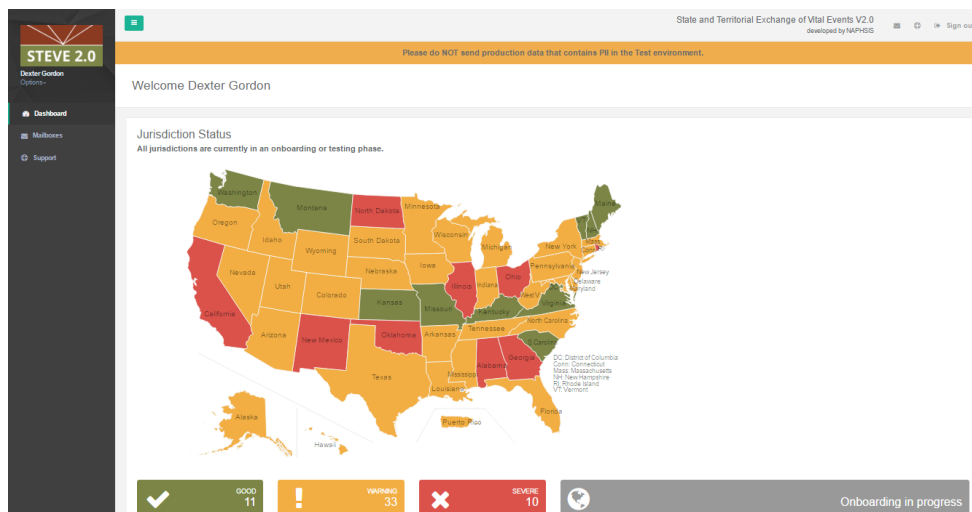
3. Enter your **User Email** and click the **Submit** button. *A Password field will appear below the Email field.*



The image shows a login form with a 'Password' input field and a 'Log in' button with a right-pointing arrow.

4. Type your **password** and click the **Log In** button.

The STEVE 2.0 Dashboard screen appears.



You are ready to use STEVE 2.0.

3. System Configuration

System Administrators in each jurisdiction using the STEVE 2.0 platform must complete two basic configuration tasks to prepare for data transfer. Essential configuration tasks include:

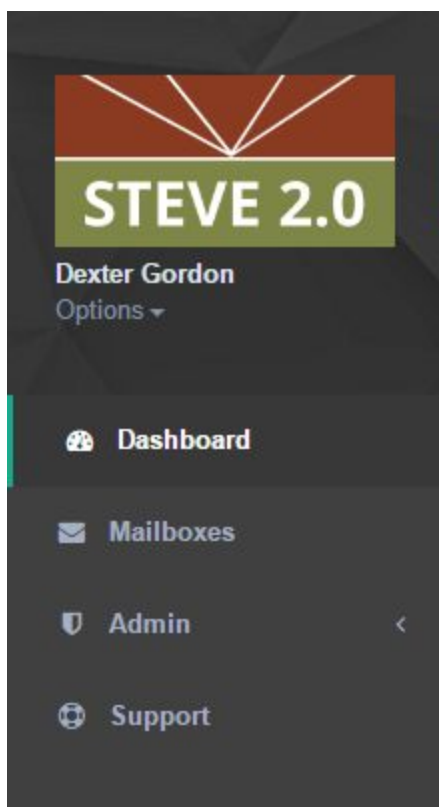
- **Create Users:** Establish a profile for each user in a jurisdiction/office
- **Configure Mailboxes:** Determine who is approved to send or receive data through STEVE 2.0.

3.1. Create Users

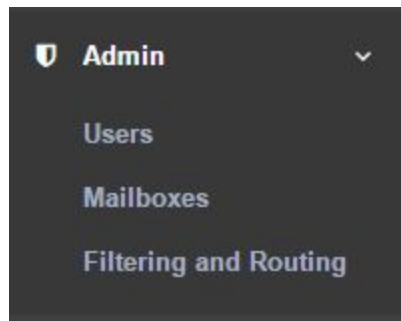
Use this procedure to establish a user profile for each person that will require access to the STEVE system.

Create a User

1. On the left side of the STEVE Dashboard, click to **expand** the **Admin menu** option.

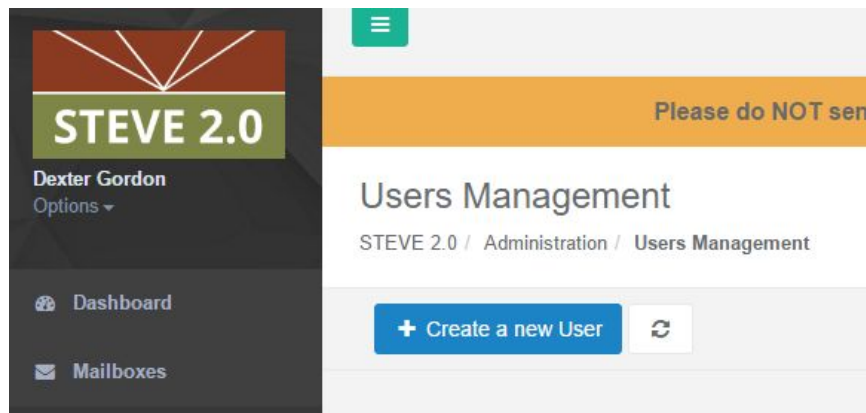


- Click on the **Users** menu item.



The Users Management screen appears.

- At the top of the screen, click the **Create a New User** button.

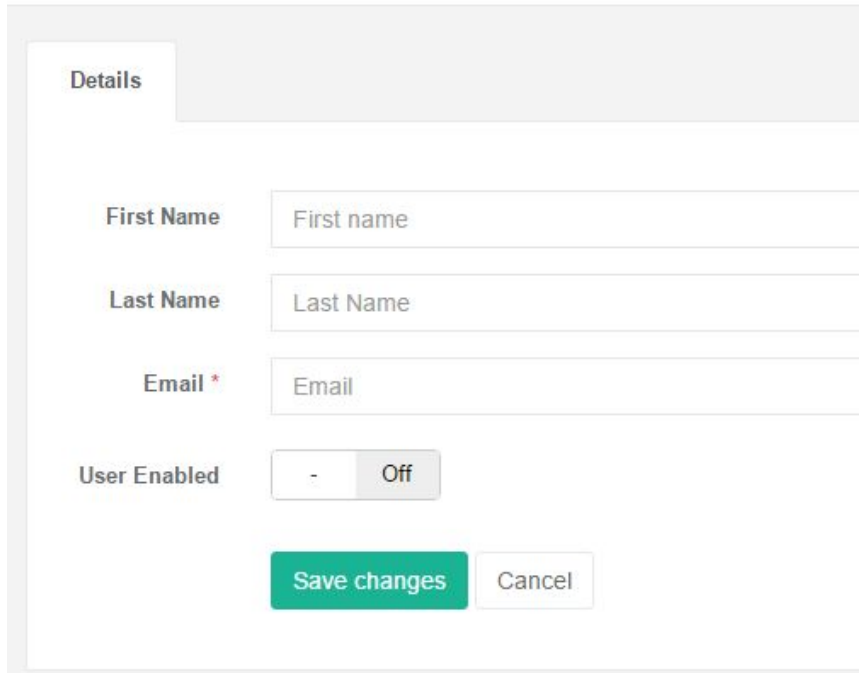


The User Details screen appears.

4. Enter the **requested information**.

User Details

STEVE 2.0 / Administration / Users Management / User Detail



Details

First Name

Last Name

Email *

User Enabled ☐ - ☐ Off

All data fields are required.

5. Select the User Enabled toggle to the **On position**.



User Enabled ☒ On ☐ -

NOTE: You must Enable a user for that person to have access to the STEVE system.

6. Click the **Save Changes** button to complete the procedure.



The Users Management screen will re-appear with the user you added appearing in the list.

Repeat this process for each person who will use the system.

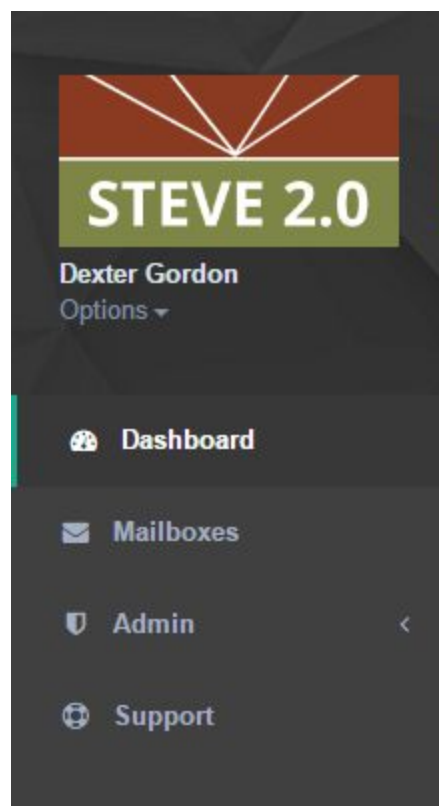
3.1.1. Set User Permissions

There are two User Permission categories defined in the STEVE system.

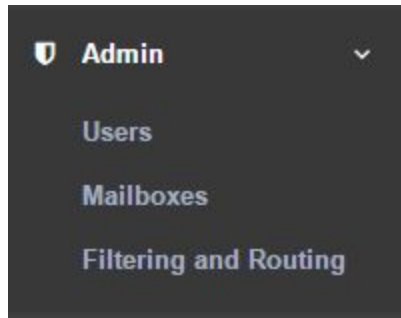
- **User:** This permission allows a user to send and receive files based on the rules established by the System Administrator. Every user receives this permission automatically when added as a user.
- **Administrator:** Users with Administrator permissions can add and delete users, configure mailboxes, and establish filtering and routing rules. A System Administrator must confer this permission to any user that needs it.

Use this procedure to confer **System Administrator permissions** for a user.

1. On the left side of the STEVE Dashboard, click to **expand** the **Admin menu** option.

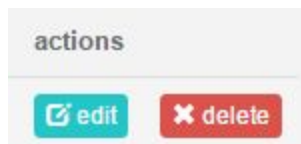


- Click on the **Users** menu item.

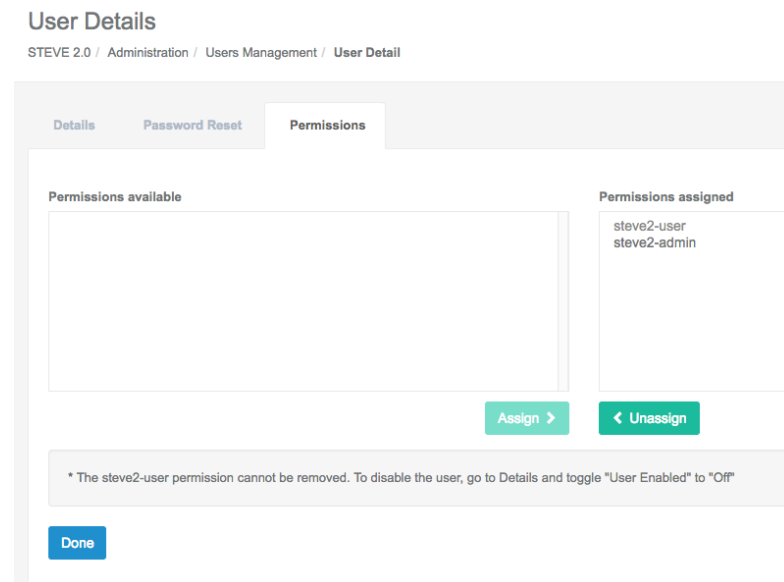


The Users Management screen appears.

- Locate the name of the desired **user** in the table and click the **Edit** button on the right hand side of the table that corresponds to the user record.



- The User Details screen appears.* Click on the **Permissions** tab.



- In the Permissions Available box on the left side, select the “**steve2-admin**” permission. Then click the **Assign** button.

6. The selected permission moves to the Permissions Assigned box.
7. Click the **Done** button to return Users Management screen.

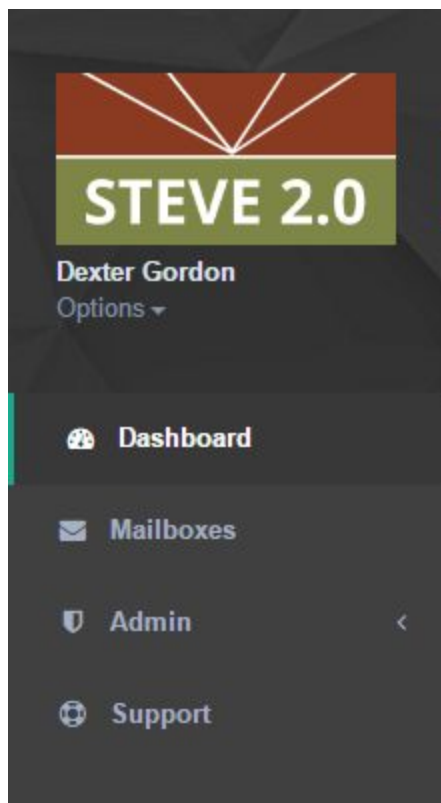
Repeat this process for every user that requires Administrator permissions.

3.1.2. Reset User Password

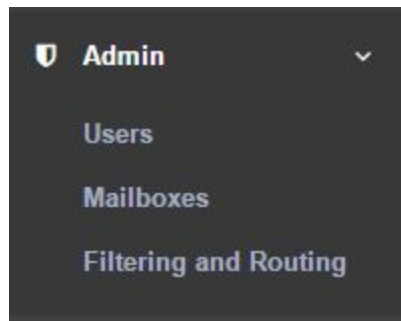
Use this procedure to **assign** a **new password** for a user. *This action does not change user permissions.*

NOTE: All users may change passwords for themselves. Administrators may change passwords for any other user in the system, including other Administrators.

1. On the left side of the STEVE Dashboard, click to **expand** the **Admin menu** option.

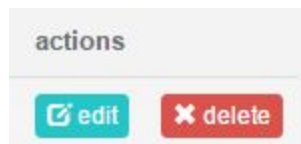


- Click on the **Users** menu item.

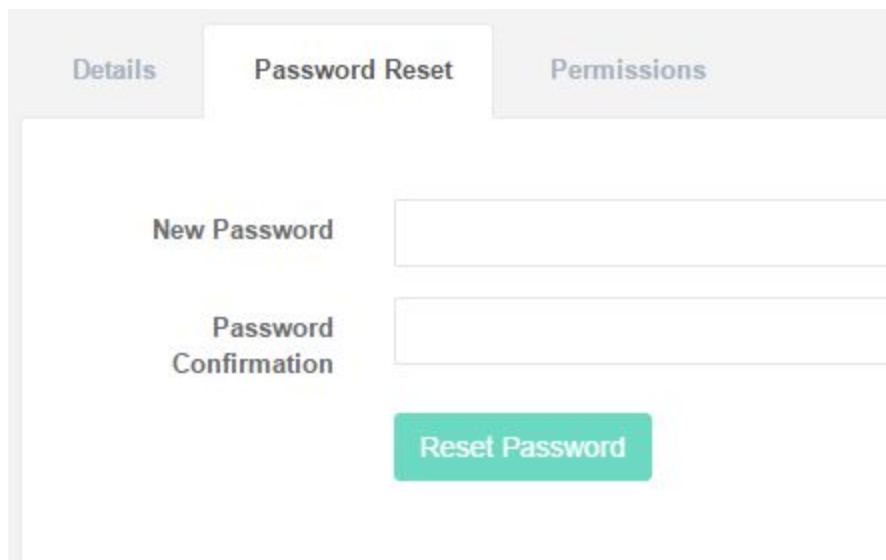


The Users Management screen appears.

- Locate the **name** of the desired user in the table and click the **Edit** button on the right hand side of the table that corresponds to the user record.



- The User Details screen appears.* Click on the **Password Reset** tab.


 A form with three tabs: "Details", "Password Reset", and "Permissions". The "Password Reset" tab is active. It contains two text input fields labeled "New Password" and "Password Confirmation". Below these fields is a teal button labeled "Reset Password".

5. Enter the **new password** in both fields and click the **Reset Password** button.

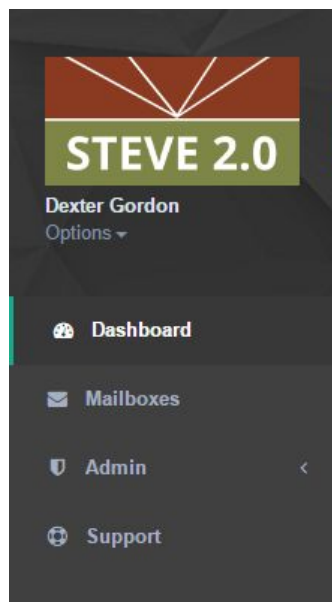
Passwords must conform to the following minimal security standards:

- Must not be empty or contain spaces
- Must contain 1 lowercase character
- Must contain 1 uppercase character
- Must contain 1 number
- Must be at least 8 characters long
- Confirm password must match
- Must not be the user's username
- Must not be one of your last 3 passwords

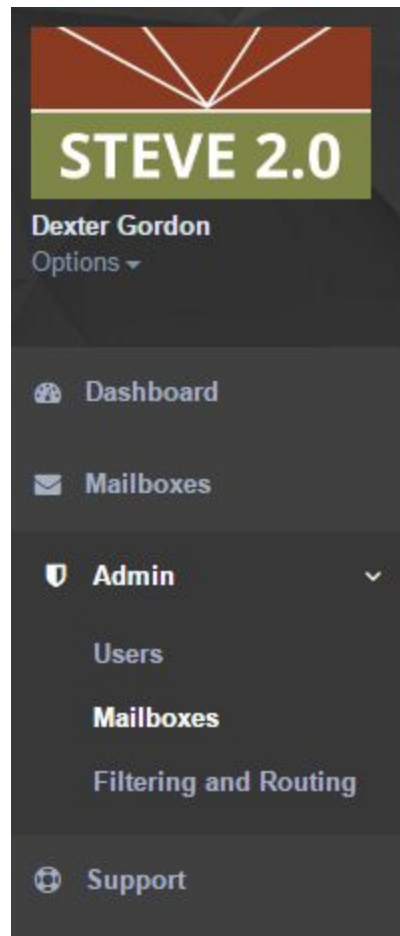
3.2. Configure Mailboxes

3.2.1. Create a Mailbox

1. On the left side of the STEVE Dashboard, click to **expand** the **Admin menu** option.

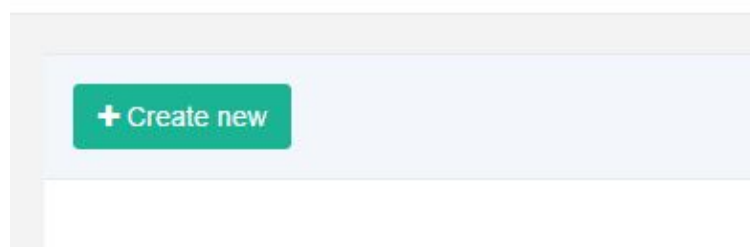


2. Select the **Mailboxes** option.



Mailboxes Configuration

STEVE 2.0 / Administration / **Mailboxes Configuration**



The Mailboxes Configuration screen appears.

Click the **Create New** button to display the New Mailbox dialog with the Name and File Type panel in focus.

New Mailbox ×

1 Name and File Type 2 Mailbox Status 3 Review and Create

File Type *

File Type: This mailbox will only accept data of this file type.

Name *

Mailbox Name: This name will show as a destination for Filtering and Routing when this mailbox is enabled.

Next > Cancel

3. Select the **mailbox File Type** and enter a **name** for the mailbox. Then press **next** to display the Mailbox Status panel.

New Mailbox

1 Name and File Type 2 Mailbox Status

Enabled? Yes

The Mailbox Status defaults to Enabled=Yes. **Leave this setting** and click the **Next** button to display

4. The Review and Create panel displays the settings you chose.

New Mailbox ×

1 Name and File Type 2 Mailbox Status 3 Review and Create

File Type: Mortality
 Mailbox Name: Mortality Regional
 Enabled: Yes

Confirm these settings and click Create to create this mailbox.

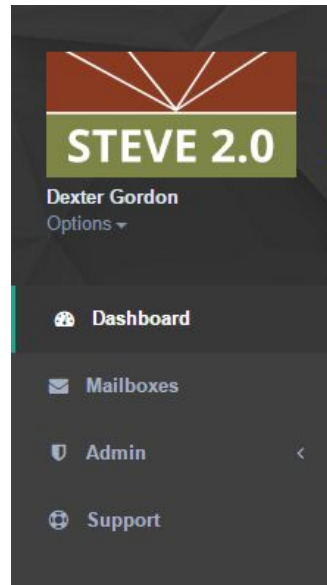
< Previous Create Cancel

5. Click **Create** to complete the process. *The Editing Mailbox screen appears where you can assign Users to the mailbox.*

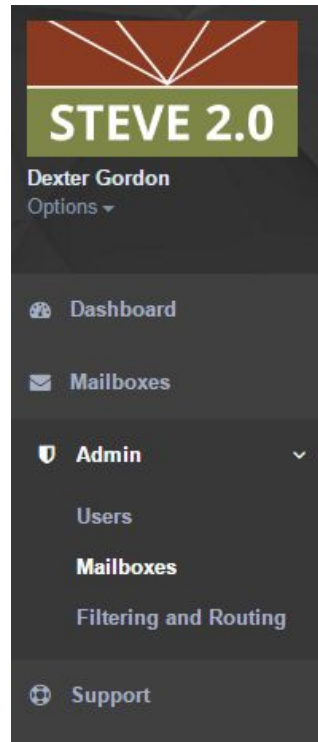
3.2.2. Edit a Mailbox

There are two ways to begin Editing a Mailbox.

- If you have just completed the Create a Mailbox process, you are ready to begin. Proceed to Step 3, below.
 - If you wish to edit an existing mailbox, begin with Step 1, below.
1. On the left side of the STEVE Dashboard, click to **expand** the **Admin menu** option.



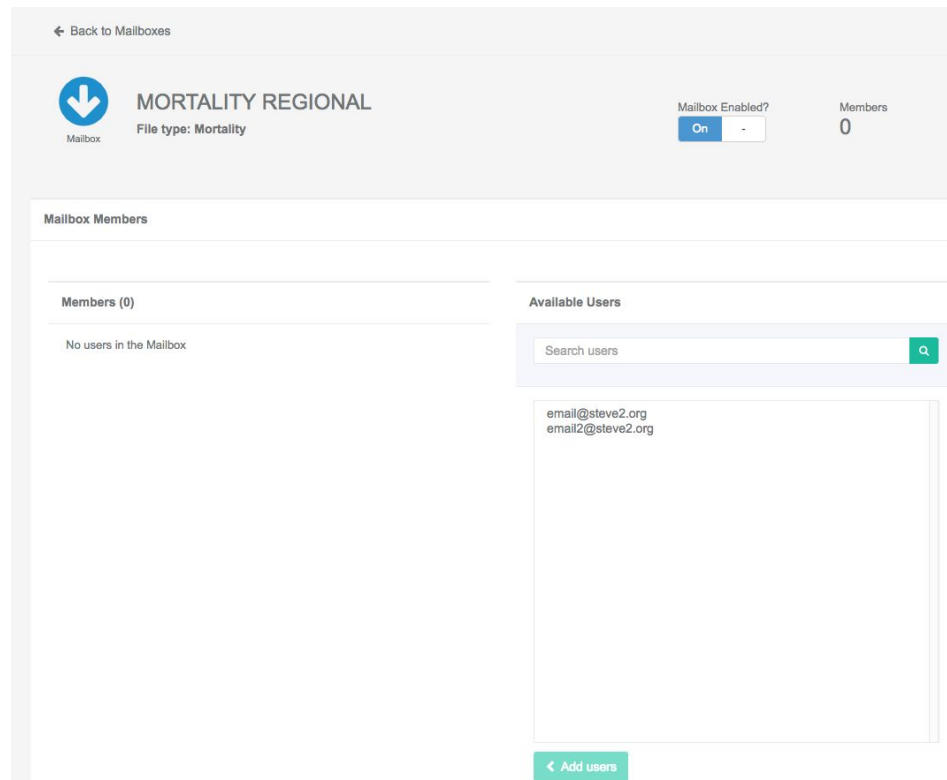
2. Select the **Mailboxes** option.



The Mailboxes Configuration screen appears for the mailbox you just created.

NOTE: To edit an existing mailbox, select it via the Mailboxes Configuration screen.

3. The Members column displays all emails that will receive messages and files sent to this mailbox. The Available Users column displays Users who are eligible to use this mailbox.



4. To add users, highlight the **desired email address** in the Available Users column and click the **Add Users** button. *The selected names will appear under the Members column.*
5. To delete a user from a mailbox, click the  next to the name you wish to remove.
6. *The Mailbox Enabled switch determines whether the mailbox is authorized to receive messages and files.* To authorize the mailbox, set the **switch** to **On**.



NOTE: Some mailboxes are protected according to system business rules. You cannot disable protected mailbox accounts.

4. Data Transport Configuration

This section of the Guide describes the steps necessary to configure data filters and routing rules that will govern the content and recipient list of outbound data files.

Each file type contains numerous data elements. The filtering capability in STEVE allows administrators to specify which of the available elements are included in certain files. The Routing rules determine which partners will receive transmitted data in their mailboxes.

The combination of filters and route designations establishes a Data Rule Set. There are two kinds of Data Rule Sets:

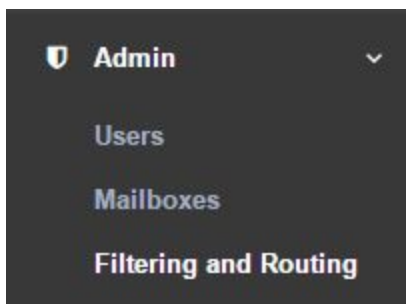
- Protected Rules:** These sets are hard-coded in the system and are designated by a red shield icon () on the Filtering and Routing screen. Administrators are allowed to change data filters within these Rule Sets, but are not allowed to change routing settings or to delete a protected Rule Set.
- Unprotected Rules:** When an administrator creates a Rule Set, it is always Unprotected. This means that any user with administrator privileges may alter the filtering and routing settings or delete the rule set completely.

4.1. Working with Filters and Routes

The ability to modify filter and route configurations is restricted to Administrators only.

4.1.1. Getting Started

- To begin, select the **Filtering** and **Routing** menu option.



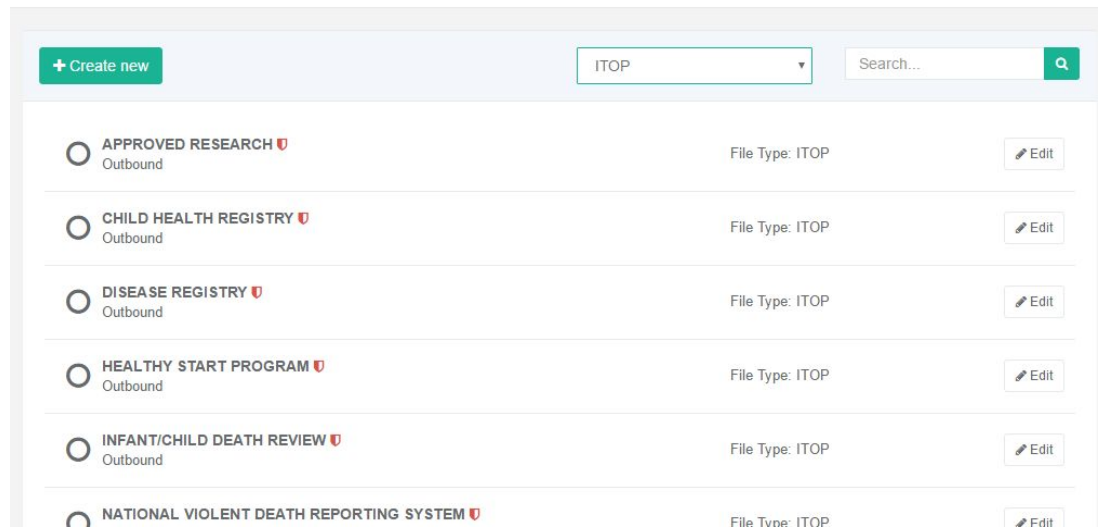
- The *Filtering and Routing* screen appears. This provides the option of working with existing rule sets or creating a new rule set.

4.1.2 Working with Existing Rules

1. On the Filtering and Routing screen, select a **File Type** from the dropdown menu. *In this example, we have selected the ITOP file type.*

Filtering and Routing

STEVE 2.0 / Administration / Filtering and Routing

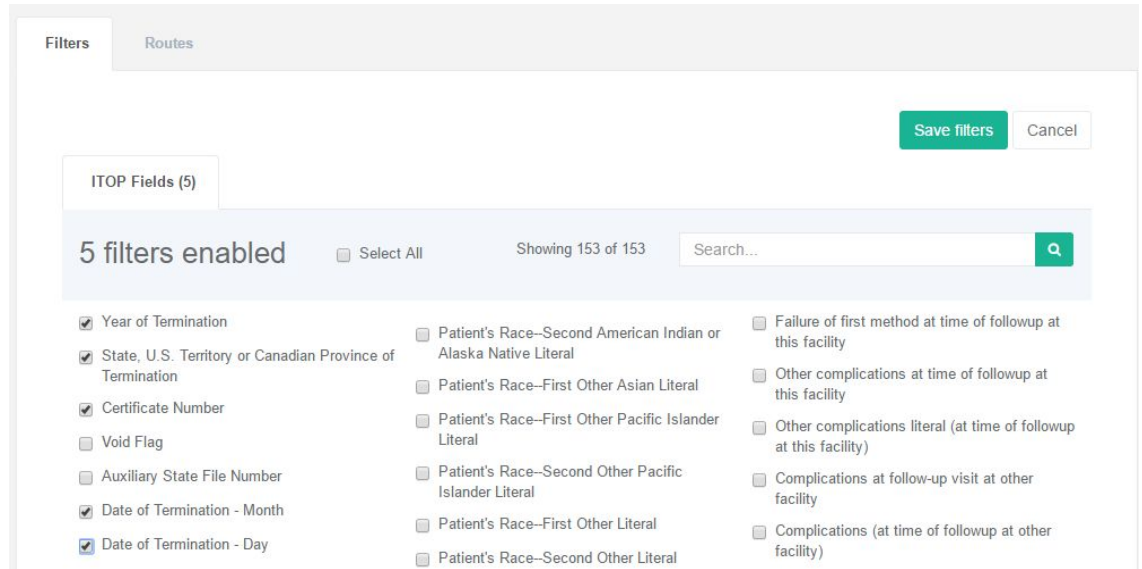


NOTE: The red shield icon beside each Rule Set. This indicates that the Rule Set is protected.

2. Click the **Edit** button for the Rule Set you want to open.



3. In this example, we have selected the Child Health Registry.

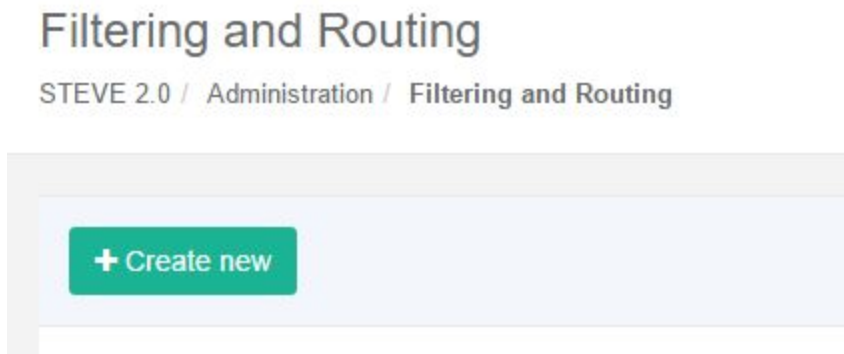


In the example, five data points are selected for inclusion in the transmitted data file.

4. Use the **Select All** checkbox to include all data elements in the Rule Set. (**Note:** Re-clicking Select All will de-select all data points.) To select specific data points, check the box that corresponds to the desired data element. When the filter selection is complete, click the **Save Filters** button.

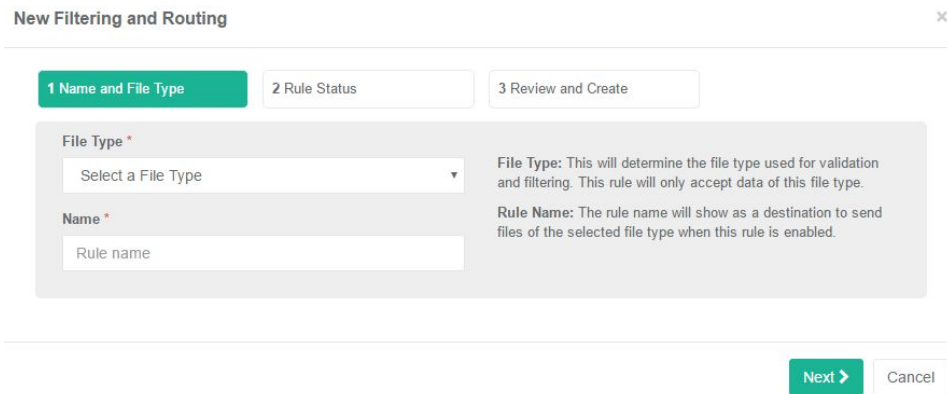
4.1.3 Creating a New Rule

1. On the Filtering and Routing screen, click the **Create New** button.



The New Filtering and Routing window appears with the Name and File Type panel visible.

2. Select the File Type and **assign** the Rule Set a **unique name**.



New Filtering and Routing [Close]

1 Name and File Type | 2 Rule Status | 3 Review and Create

File Type *
 Select a File Type [Dropdown]

Name *
 Rule name [Text Input]

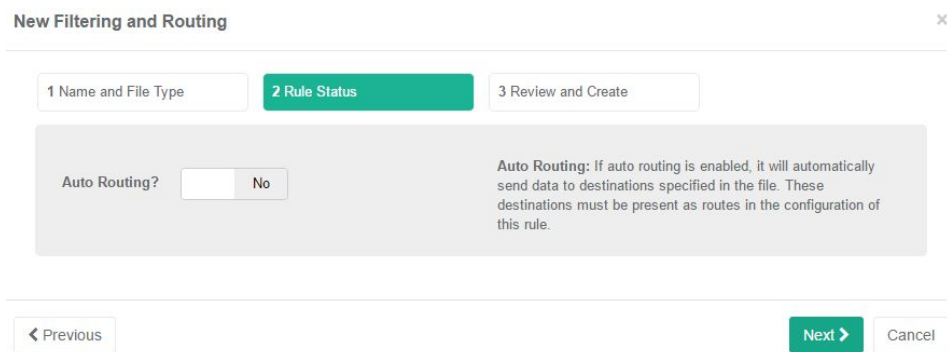
File Type: This will determine the file type used for validation and filtering. This rule will only accept data of this file type.

Rule Name: The rule name will show as a destination to send files of the selected file type when this rule is enabled.

[Next >] [Cancel]

Then click **Next**. The Rule Status panel appears.

3. Set the **Auto Routing** switch as needed and click **Next**.



New Filtering and Routing [Close]

1 Name and File Type | 2 Rule Status | 3 Review and Create

Auto Routing? [Yes/No Switch] No

Auto Routing: If auto routing is enabled, it will automatically send data to destinations specified in the file. These destinations must be present as routes in the configuration of this rule.

[< Previous] [Next >] [Cancel]

NOTE: Setting Auto Routing to YES instructs the system to sort the full data file into smaller files that include jurisdiction specific data that is delivered to each jurisdiction accordingly. Setting this switch to NO instructs the system to send the entire data set to every jurisdiction in the Routing instructions.

4. *The Review and Create panel appears.* Verify the **Type**, **Name**, and **Auto-Routing** settings are correct. Then click the **Create** button.

5. *The Editing Filtering and Routing Rule screen appears.*

Editing Filtering and Routing Rule SPECIAL MORTALITY
STEVE 2.0 / Administration / Filtering and Routing / Editing Filtering and Routing Rule

← Back to Filtering and Routing

 **SPECIAL MORTALITY**
Filtering and Routing File type: Mortality

Rule Enabled? ☐ Off Filter must be configured
No mailboxes selected

Filters Routes

Save filters Cancel

NCHS Standard (0) Super MICAR *TRX (0) AdditionalData (0)

No filters enabled ☐ Select All Showing 93 of 93 Search...

☐ Date of Death-Year ☐ Date of Death-Month ☐ Decedent's Race-Second Other Pacific Islander Literal
☐ State of Death ☐ Date of Death-Day ☐ Decedent's Race-First Other Literal
☐ Certificate Number ☐ Time of Death ☐ Decedent's Race-Second Other Literal
☐ Void flag ☐ Decedent's Education

Select the **data points** you want to include in the Rule Set. Then click the **Save Filters** button.

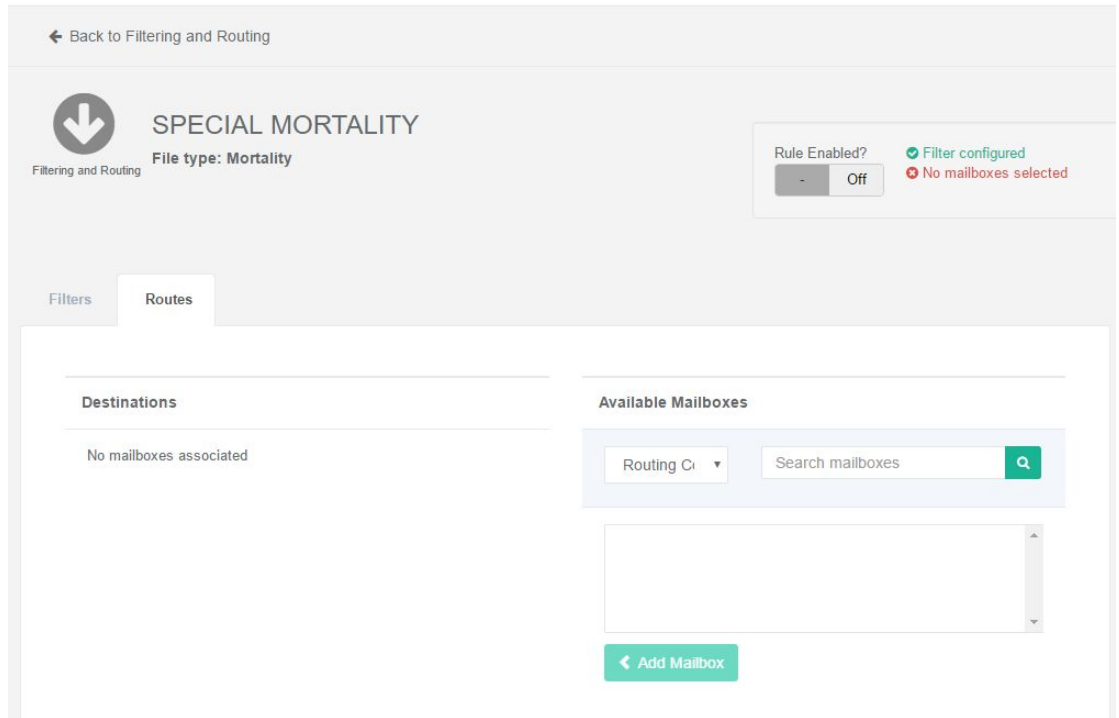
6. At the upper right of the screen, you will see this display.

Rule Enabled? ☐ Off Filter configured
No mailboxes selected

This indicates that you have set your filters, but that you still need to define your **Routing rules**.

7. Select the **Routes** tab.

Editing Filtering and Routing Rule SPECIAL MORTALITY
 STEVE 2.0 / Administration / Filtering and Routing / Editing Filtering and Routing Rule



8. In the Available Mailboxes panel, select the **desired jurisdiction** from the dropdown list to display a list of available mailboxes.

Select the **desired mailboxes**. *You can make multiple selections.* Then click the **ADD Mailbox** button.

Available Mailboxes

GA

- (GA) Approved Research
- (GA) Child Health Registry
- (GA) Disease Registry
- (GA) Healthy Start Program
- (GA) Infant/Child Death Review
- (GA) National Violent Death Reporting System
- (GA) NCHS
- (GA) Other State-operated federal surveillance program
- (GA) PRAMS
- (GA) Private Sector Organization
- (GA) Requester
- (GA) State Eligibility Program
- (GA) Vital Records
- (GA) Voter Registration

9. Your selections will appear in the Destinations column.

Filters Routes

Destinations

(GA) APPROVED RESEARCH	X
(GA) INFANT/CHILD DEATH REVIEW	X
(GA) NCHS	X
(GA) PRIVATE SECTOR ORGANIZATION	X

At the upper right of the screen, you will see this display.

10. Click the Rule Enabled? Toggle to **finalize** and **activate** the new rule.

Rule Enabled?

☒ Filter configured
☒ Mailboxes selected

5. Other Tasks

This section provides instruction about the various ongoing tasks the System Administrator will do to maintain the system operation.

5.1. Account Options

Any STEVE 2.0 user, regardless of permission designation, may perform basic maintenance on their own accounts.

Working with Account Options

1. At the upper left corner of the STEVE 2.0 screen, **expand** the **Options Menu** just below your username and click on your **email address**.



2. The AIMS / STEVE 2.0 Account Options screen appears.



3. Use the menu to select the desired **Account task**.

Editing Your Own Account

1. Select the **Account menu** option to display the AIMS Edit Account panel.



2. This screen allows you to **modify** your First and Last name and to add or change your phone number. Click **Save** to confirm your changes or **Cancel** to maintain current settings.

Change Your Own Password

1. Select the **Password menu** option to display the AIMS Change Password panel.



2. Enter your **Current Password**. Then enter your **New Password**.
3. To verify your new password, **re-enter** it in the **Confirmation field** exactly as you entered the New Password field.
4. Click **Save**. *If the New and Confirmation fields match, the system will store and activate your new password.*

Password Rules

Passwords must conform to the following security standards:

- Must not be empty or contain spaces
- Must contain 1 lowercase character
- Must contain 1 uppercase character
- Must contain 1 number
- Must be at least 8 characters long
- Confirm password must match
- Must not be the user's username
- Must not be one of your last 3 passwords

5.2. Dashboard Map

The STEVE 2.0 Dashboard Map provides a quick reference to see the processing status of all jurisdictions using the system. The map key is:



States shaded green have been active in the past 3 days and/or have less than 3 unread messages.



States shaded orange have not been active in the past 3-7 days and/or have 3-10 unread messages.



States shaded red have not been active for more than 7 days and/or have more than 10 unread messages.

5.3. Request Support

The STEVE 2.0 interface provides two ways to submit a request for support.

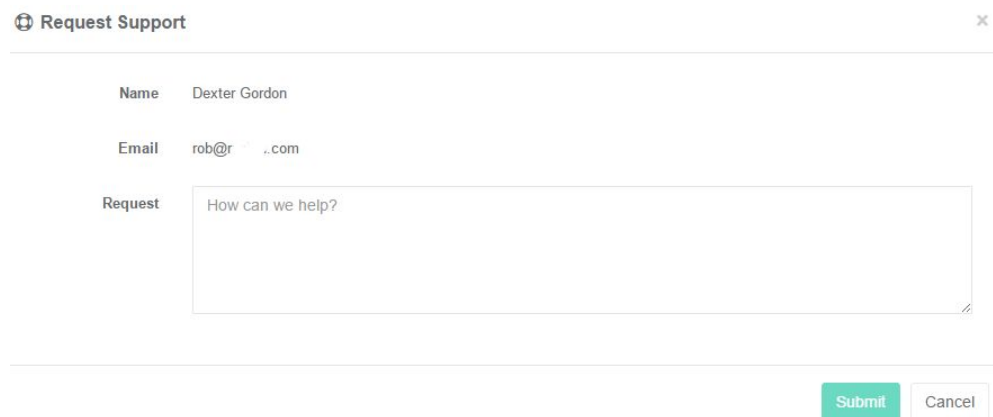
1. To open a support request, do either of the following:

At the upper right of any screen, click the **Support icon** .

or

In the left side menu, click the **Support menu** option.

The Request Support panel appears with your name and email address automatically filled in.

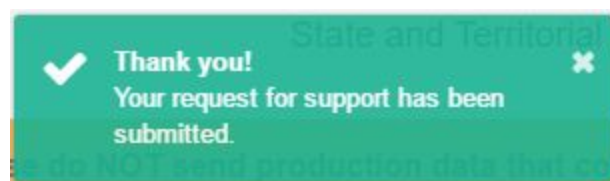


The screenshot shows a 'Request Support' panel with a title bar containing a close button (X). The form contains three fields: 'Name' with the value 'Dexter Gordon', 'Email' with the value 'rob@r...com', and a large 'Request' text area with the placeholder text 'How can we help?'. At the bottom right of the panel are two buttons: a green 'Submit' button and a grey 'Cancel' button.

You can also contact Support by calling 1-301-244-0138.

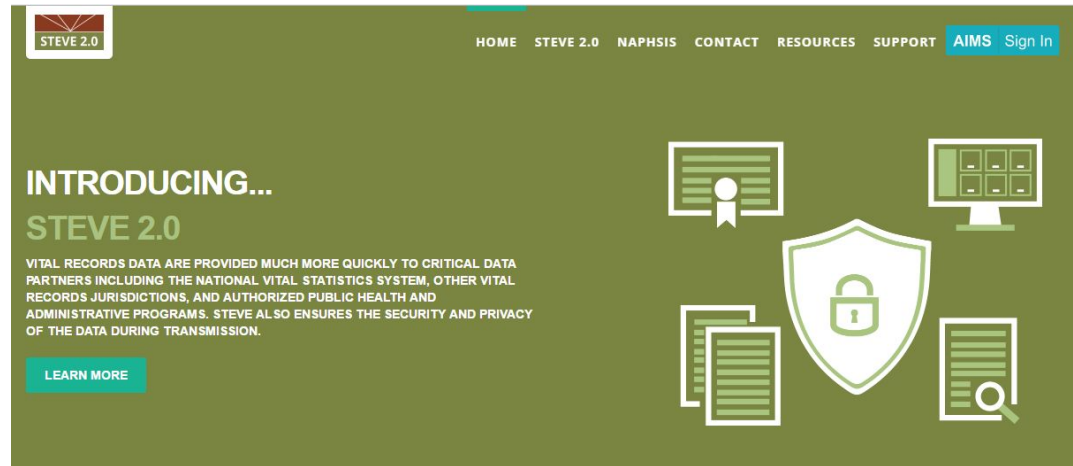
2. Describe your concern in the **Request text field**. Provide as much pertinent information as possible. Then click **Submit**.

You will return to the screen you were working on, with a message at the top indicating successful submission.



5.4. System Home Page

The STEVE 2.0 Home Page provides access to background information about the system and some of the partners involved in the development and management of STEVE 2.0.



Menu Options

HOME: Return to the top of the Home Page.

STEVE 2.0: Select this option to download a system overview of STEVE 2.0.

NAPHSIS: Select this option to find out more about NAPHSIS and its mission.

CONTACT: Select this option send an email to the STEVE 2.0 Support Team.

RESOURCES: Select this option to download information about the STEVE 2.0 project.

SUPPORT: Select this menu option to open a Support Request. See Section 5.3, “Request Support”, for more details.

5.5 STEVE 2.0 Main Screen Top Menu Option Icons

Top Menu



Messages: Click this icon to **view** recent **messages** or **open** your **Mailbox**.



Support: Click this icon to **open** a **Support Request**. See *Section 5.3, "Request Support"*, for more details.



Sign out

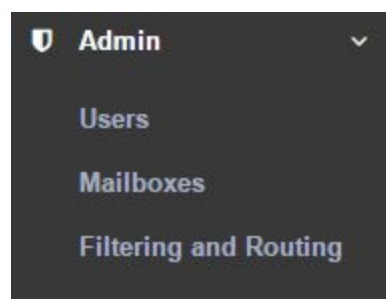
Sign Out: Click this icon to **securely exit** the STEVE 2.0 system.

Left Panel Menu

Dashboard: Select this **menu** option to display the STEVE 2.0 **Dashboard**.

Mailboxes: Select this **menu** option to open your **Mailbox**.

Admin: Select this **menu** option to expand the **Admin** menu. Note that this menu option is only available to users with Administrator permissions.



Support: Select this **menu** option to open a **Support Request**. See *Section 5.3, "Request Support"*, for more details.

Contact

STEVE 2.0 Support Team

1-301-244-0138

support@STEVE2.org

<https://steve2.org/>