



SONIA Y. ANGELL, MD, MPH
State Public Health Officer & Director



GAVIN NEWSOM
Governor



CDPH Vital Statistics Applications (VSA) Manual

State of California—Health and Human Services Agency California
Department of Public Health
Center for Statistics and Informatics

Ellen Badley, Chief
Vital Statistics Branch

Michelle Miles, Chief
Health Information and Research Section

Chris Holm, Chief
Data Management Unit

Contents

1.0 CDPH VSA.....	4
1.1 What is CDPH VSA?.....	4
1.2 How can I obtain access to CDPH VSA?.....	4
1.3 Login for requesters with existing accounts.....	4
1.4 How do I log-in?.....	5
1.5 How do I reset my password?.....	5
2.0 Navigating the Home Page (also known as the DASHBOARD).....	6
2.1 Actions.....	6
2.2 Recent Items.....	6
2.3 Messages.....	6
2.4 Projects.....	6
2.5 xForms section of dashboard.....	7
2.6 Events.....	7
2.7 My Projects.....	8
2.8 Find Project.....	9
2.9 Help.....	9
2.10 Test's Settings.....	9
2.10.1 Change Password.....	9
2.10.2 Change Your Profile.....	9
2.10.3 My Phone Numbers.....	10
2.10.4 My Address.....	10
2.10.5 Log-In Information.....	11
3.0 Managing forms in CDPH VSA (xForms).....	12
3.1 New project applications.....	12
3.2 Completing an xForm.....	12
3.2.1 Attaching Documents.....	13
3.2.2 Submitting the xForm.....	13
3.3 Checking the status of an xForm.....	14
3.4 Decision Notification.....	15

4.0 Navigating the Project Protocol Page	16
4.1 Project	16
4.2 Project-Site.....	16
4.3 Contacts	16
4.4 Attachments	17
4.5 Events	17
4.6 Event Details	17
4.7 Steps	18
4.8 Actions in the Event Details.....	18
4.9 Further Questions.....	18

1.0 California Department of Public Health Vital Statistics Applications (CDPH VSA)

1.1 What is CDPH VSA?

CDPH VSA is an online submission, workflow, and data management system for requesting CDPH Vital Statistics data. The electronic forms provided within this system will allow requesters to submit new data requests for review and applications for continuing review. This allows the requester to follow the application through the review process. Please see the [Vital Statistics Data Request Guide](#) for details on the request process, data products available, and cost estimates for data products.

Once an application (also known as an xForm) is accepted for processing, a requester may access details about their application, such as information about their overall project and the different data products that constitute the project where applicable. Within the project detail screen, requesters may view Event details, such as a list of all attachments associated with the project and a table showing all processing steps that have been completed for the application.

CDPH VSA is a fully web-based system, which means that requesters can log in anywhere they have internet access. The recommended browser for accessing CDPH VSA is Google Chrome.

1.2 How can I obtain access to CDPH VSA?

- If you are a new requester submitting to CDPH VSA for the first time, you will need to register for CDPH VSA at: <https://cdphvsa.my.irbmanager.com/> by clicking on 'Click here to register.'
 - Enter your registration information as applicable. Once you register, you will receive an email with a link to reset your password. You must use this link within 24 hours. If you do not change your password within 24 hours, you will need to click on 'Forgot password?' to have a new link sent.

1.3 Login for requesters with existing accounts

If you attempt to register an account using an email address that is already associated with an existing account, CDPH VSA will guide you through password recovery.

1.4 How do I log-in?

1. Go to <https://cdphvsa.my.irbmanager.com/>.
2. Enter your username and password. Your username will always be an email address (this is the email address you initially registered with).
3. Click Login.
4. If you are uncertain if you have an CDPH VSA account, contact HIRS@cdph.ca.gov.

1.5 How do I reset my password?

Click on the 'Forgot password?' to reset your password. You will receive an email with a link to reset your password. This link will expire within 24 hours. If you do not receive this email, check your 'spam/junk' folder.

As a security precaution, CDPH VSA locks your account after three incorrect password attempts. It is recommended that you reset your password after two incorrect attempts. If your account is locked, use the 'forgot password' to reset your password and unlock your account.

2.0 Navigating the Home Page (also known as the DASHBOARD)

2.1 Actions

The screenshot shows the 'My Projects' dashboard for the California Department of Public Health. It includes a navigation menu on the left with options like 'Actions', 'Recent Items', 'Messages', 'Useful Links', and 'My Docs & xForms'. The main content area displays several summary cards: 'Projects (28 Active)', 'xForms (11 Active)', and 'Events (18 Open)'. A pie chart shows the distribution of events. Below these cards is a table of active projects.

Project	Site	PI	Project Title	Expires	Status
19-09-0013-Master Tracking	Default Site		This is the Project Title of the Project that I am working on and it totally has a Title that I did not just make up on the spot.		New From PI
19-12-0021-Birth - Public Use	Birth - Public Use	Test, Test		N/A	New From PI
19-12-0021-Death - Public Use	Death - Public Usa	Test, Test		N/A	New From PI

Under actions, you can start a new application by clicking Start xForm. Note that electronic applications will be referred to as xForms.

2.2 Recent Items

The hyperlinks under this heading will show the most recent items you have viewed in CDPH VSA. You can just click on any link under "Recent Items" to go directly to that item.

2.3 Messages

This heading is an area that CDPH will use for general communication to all of the requesters within the system.

2.4 Projects

This area shows any projects with which the requester is associated as Requester/Principal Investigator (PI), Coordinator, Co-PI, Administrative Contact, or other research staff.

Note: By clicking on the underlined link, you will be able to view the details of the projects with which you are associated.

This screenshot shows a detailed view of the 'My Projects' section, highlighting 'Projects (3 Active)'. It lists the user's association with 3 active and 3 total projects, and notes that the user is the PI for 3 active and 3 total projects.

2.5 xForms section of dashboard

The xForms section shows the applications currently being processed at this time for the requester.

xForms (5 Active)

- You have **2 unsubmitted** xForms.
- You have **3 xForms** being processed at a later stage.
- There are **1 xForms** awaiting your attention.

In this view of the DASHBOARD:

- You have 2 unsubmitted xForms.
 - The requester currently started 2 xForms (submissions), but clicked “Save for Later” or closed out of the form without submitting the application.
 - Note: By clicking the underline link, “2 unsubmitted” the requester can go straight to the unsubmitted xForms.
- You have 3 xForms being processed at a later stage.
 - The requester has submitted 3 applications that are currently awaiting review and signature by the requester/PI, or is being processed.
- You have xForms in error (not shown in screenshot).
 - The requester has some applications that have errors. This is a software issue and the requester must notify the CDPH office if they receive this notification.
 - Note: If the requester has an xForm in error, the requester can click the underline link and go straight to the xForm in error.
- There are xForms currently awaiting your attention.
 - The requester has 1 xForm that currently needs action by the requester (i.e. review and signature required, revisions requested by CDPH).
 - Note: By clicking the underline link, “xForms” the requester can go straight to the xForms that need the requester’s attention.

2.6 Events

The events section of the DASHBOARD shows the total number of open events and the number of events categorized by name. The dropdown following “Only show events where I am:” will allow you to view the events according to your role in the associated project.

Events (4 Open)

Only show events where I am:

 You have **4 Initial Submission** events.

You have **4 Total Open** events



2.7 My Applications

This is a list of all the active applications with which the requester is associated. NOTE: An application is not active until a requester submits an xForm. An application becomes active when CDPH determines that the submission is complete and ready for review. From your DASHBOARD, you can view the following information regarding your applications:

- The project number.
- The main site where the data will be stored.
- Note: If the data is stored at more than one physical location, each physical location will need to be listed.
- The Requester/PI name.
- The project title (if applicable).
- Committee for the Protection of Human Subjects (CPHS) Expiration date of the project (if applicable).
- Status: This will depend on whether the application is still under initial review or if elsewhere within the application's lifecycle. Statuses can include Closed, New from PI, Open, or Withdrawn. Note that applications that have not been submitted will not display here.

Note: By clicking on the blue link under "Project" the requester can go straight to the project.

My Projects (2 Active)						
Project	Site	PI	Project Title	Expires	Status	
20-04-0014-Master Tracking	Default Site	Inbox, HIRS			New From PI	
20-04-0016-Master Tracking	Default Site	Test, Test			New From PI	

By clicking the small arrow to the right of Project, Site, Requester/PI, Title, Expires, and Status, you can sort the projects accordingly.

- Project can be sorted by Project Number.
- Site can be sorted alphabetically.
- PI is sorted alphabetically.
- Title is sorted alphabetically.
- Expiration dates are sorted by numerical date.
- Status is grouped and sorted alphabetically.

2.8 Find Project

Requesters can search by Requester/PI name or Project number to find an application with which the requester is associated.

2.9 Help

HELP – Under Help you can contact the CDPH VSA Administrator by choosing ‘Contact Administrator’. Page help is currently disabled. Use this manual for assistance with using CDPH VSA.

2.10 Settings

Allows the requester to edit their profile settings. By clicking on Settings, you will access My Settings.

Under My Settings you can:

- Change your password
- Change your profile
- Change your phone number
- Change your address
- View last 25 logins
- Create an email signature

2.10.1 Change Password

1. Step 1: Click on “Change My Password” link.

You will then see this view:

Change Password	
User	Test Generic Coordinator Login
Username	Coordinator
Old Password	<input type="password"/>
New Password	<input type="password"/>
New Password Confirm	<input type="password"/>
<input type="button" value="Update"/>	

2. Enter old password.
3. Enter new password that meets requirements and then enter new password again to confirm. Your password must meet the following requirements:
 - Be 6 or more characters
 - Be different from the username
 - Contain any 3 of the following: upper case letter(s), lower case letter(s), number(s), and special characters (e.g. !, @, #)
4. Click “Update.”

2.10.2 Change Your Profile

1. Click on “Change My Profile” link.

My Profile

Change User Information

First Name	<input type="text" value="Test Generic"/>
Last Name	<input type="text" value="Coordinator Login"/>
Degree	<input type="text"/>
Specialty	<input type="text"/>
Email Address	<input type="text"/>

You will then see this view:

2. Update your name, degree, specialty or email address.
3. Click "Update."

2.10.3 My Phone Numbers

1. Click on "My Phone Number(s)" link.

My Phone Numbers

Numbers			
Action	Primary	Type	Number
 	<input checked="" type="checkbox"/>	Business	3-2693

You will then see this view:

2. Click the icon that appears to be a hand holding a piece of paper.

You will then see this view:

Contact Name	
Full Name:	<input type="text" value="Test Generic Coordinator Login"/>
Phone Book	
Phone Type:	<input type="text"/> 
Primary Number:	<input checked="" type="checkbox"/>
<input type="button" value="Add Phone"/> <input type="button" value="Cancel"/>	

3. Update or add your phone number.
4. Click "Update Phone" Or "Add Phone."

2.10.4 My Address

1. Click on "My Address(es)" link.

You will then see this view:

Address Book (1)							
Action	Primary	Type	Street	City	State	Zip	Country
 	<input checked="" type="checkbox"/>	Business	10 Anywhere St	Anywhere	California	11111	United States

2. Click the “hand holding a piece of paper” icon.

You will then see this view:

Contact Name	
Full Name: Investigator, Test MSc	Email:

Address Book	
Address Type: Business ▾	Country: United States ▾
Street: 10 Anywhere St	
Line 2:	
Line 3:	
City: Anywhere	
State/Province: CA - California ▾	Zip/Postal Code: 11111
Primary Address: <input checked="" type="checkbox"/>	
<input type="button" value="Update Address"/> <input type="button" value="Reset"/> <input type="button" value="Cancel"/>	

3. Update your address.

4. Click “Update Address.”

2.10.5 Log-In Information

Clicking on this link will provide a list of the time and date of the last 25 times you logged into CDPH VSA.

3.0 Managing applications in CDPH VSA (xForms)

CDPH VSA uses web-based applications called xForms. Requesters will submit the xForm appropriate to the type of request.

3.1 New applications

1. On the home page (the view when a requester logs in), under the action menu on the far left side is the following option:
 - a. Start xForm
 - i. Gives the option to start one of the above forms or to start the 'Create New Contact' form, which is used to create a username and login for a contact not in the CDPH VSA system.
2. Click on the name of the form to start the form.

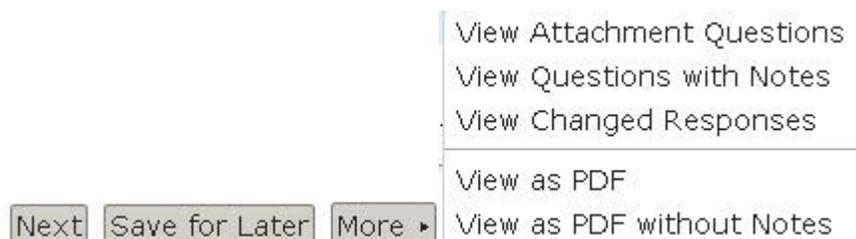


- a. This will start the applicable form that you have requested.

3.2 Completing an xForm

After entering basic details, the next questions in the xForms are directed by the answers given. For example, requests for future years of data will prompt a requester to enter into a contract. Changing responses on the form will enable subsequent questions that were hidden or hide questions that are no longer applicable.

To navigate an xForm, click "Next" to move on to the next page of the xForm. Click "Save for Later" to stop working on the form. The xForm can then be reopened by going to the xForm link under "Actions."



Most questions on the form are required (the question will be labelled "Required"). Optional questions will indicate they can be skipped in the question text. All required questions on the form must be completed before submitting. If they are not, a red error message will appear. The system will not allow you to continue until the field has been populated.

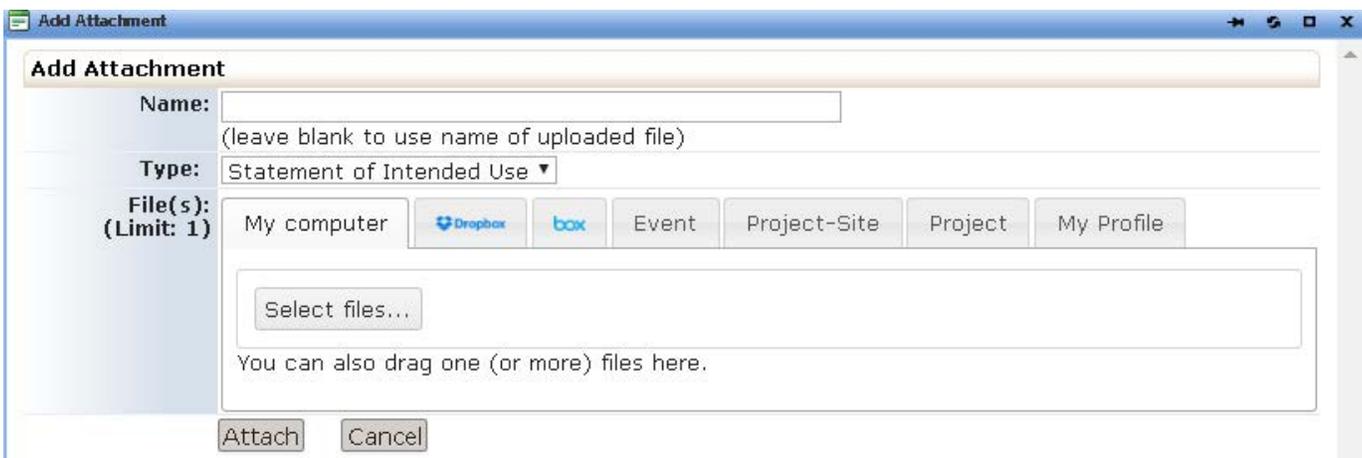
All required questions on a page must be completed before clicking 'Next'. To skip to another page on the form without answering all questions on the page at that time, use the navigation drop down at the top of the page.



3.2.1 Attaching Documents

To attach a document:

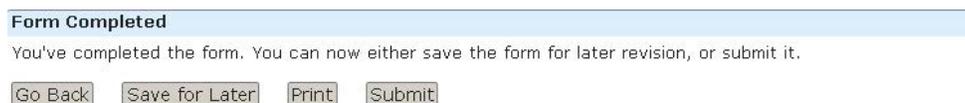
1. Click "Add Attachment." Possible attachments include approval letters, CVs, data dictionaries, Information Privacy and Security Requirements, notarized acknowledgments, etc.
2. Enter name for your attachment. If you want to just use the name of the uploaded file, leave this field blank.
3. Select the type of attachment if that option is available. On some questions, only a certain type of document is intended to be attached, and the type is pre-set.
4. Click the "Select" button to locate the file you would like to attach.
5. Click "Attach" to finish the process.



3.2.2 Submitting the xForm

Before submitting an xForm, review the form completely. After all pages on the form have been completed, the submission screen will appear. "Submit" will need to be clicked to complete the submission.

Note: Changes cannot be made once an xForm is submitted.



3.3 Checking the status of an xForm

Click on 'xForms' under 'My Documents & Forms' on the left-hand side of the screen to see a list of all xForms with which you are associated (Requester/PI, et cetera).

Action	Form	Identifier	Owner	Stage	As Of
	Public Use Application (Draft)	20-04-0016	Public Use Application 20-04-0016-Master Tracking	Production (And Delivery)	3 hours ago

- Action: If a form can be deleted, an "X" will display in this column. Note that an xForm can only be deleted when in data entry stage.
- Form: Name of the application.
- Identifier: This is generally the Requester/PI associated with the application.
- Owner: The owner of the application will be the requester who started the xForm until an application is submitted. Once submitted, the Requester/PI becomes the owner of the application.
- Stage: This is the current stage of the application. Stages will vary by application, but in general will have the following:
 - Application Data Entry--application is currently owned by the requester either to complete or make changes.
 - Applicant Signature--application is awaiting requester signature.
 - Staff Screening--application is being screened for completeness. The request will either require further information/documentation or be assigned for review.
 - Under Review--application review has begun.
 - Office Processing of Review--application review is nearing completion.
 - Production (And Delivery)--requested data product has been assigned for production
 - Pending Data Product--some requested data products are unavailable at this time, such as future year requests. Currently available data products will be delivered in the interim.
 - Complete

You can also check the status of the xForm from within the event. Note: the xForm will be 'owned' by the type of event with which it is associated.

3.4 Decision Notification

Once CDPH has completed their review, the Requester/PI will receive an email detailing the decision. Once a determination has been made, the appropriate approval/determination letter will be attached to the application within CDPH VSA.

4.0 Navigating the Master Tracking Page

From the home page, you can access Master Tracking page for each of your projects. Click on the blue Project number link to access this page.

4.1 Project

This section notes basic information about the project. Projects may include the following:

- Project number
- Sponsor
- Committee
- Sponsor ID
- Category
- Grants
- Agent Type: type of research
- Title
- Year: year of first review
- Comments: description of the project as entered on the new project application

▼Project			
Project:	19-09-0013	Sponsor(s):	
Committee:	Non VSAC	Sponsor Id:	
Category:		Grants:	
Organization:	Clemson University	CRO:	
Agent Types:		Year:	2019
Project Title:	This is the Project Title of the Project that I am working on and it totally has a Title that I did not just make up on the spot.		
Application Type:	Public Use Application		
Comments:			

4.2 Project-Site

This section notes information about the project and the project-site, such as:

- Site(s): the primary location of the research
- PI: Principal Investigator/Requester of the project
- Status: Closed, New from PI, Open, Withdrawn
- Approval: current approval date
- Initial Approval: the date that the project was first approved
- Expiration: the CPHS expiration date (this is the day the project will expire unless a continuing review is granted by CPHS)
- Comments

Project-Site			
Site(s):	Master Tracking - Default Site	PI:	Holm, Chris
Status:	New From PI	Additional:	N
Approval:		Expiration:	
Initial Approval:		Other Expirations:	
Contract Frequency:		VSAC Approval Date:	
Years Requested:			
Comments:			

4.3 Contacts

This section lists the contacts associated with the data request along with their role, phone number and email address.

▼ Contacts (2)	
Name	Role
Test Generic PI	Co-Investigator

4.4 Attachments

This section stores any documents associated with the application.

4.5 Events

This section lists all CDPH “events” or submissions that have been or are being conducted for the project. The event line contains the following sections:

- Event: the type of event
- Att: number of attachments associated with that event or review
- Start: the date the event was started or loaded into CDPH VSA
- Complete: the date the event was completed
- Last Mtg: the last meeting this event or review was submitted to
You can click on any blue event link to view the event details specific to the event (See Section 5.0).

4.6 Event Details

Event Details are specific to the event or submission.

The event details contain the following:

Project Site:

- Project: project number
- Site: location where the project is taking place
- PI: principal investigator’s name

Event:

- Type: the type of event
- Instance: amendment information (if applicable)
- Started: the date the event first started
- Completed: the date the event was completed

Event	
Type: New submission	Started: 01/28/2016
Instance:	Completed:
Committee: Inherited from Study	

4.7 Steps

This shows the actions that take place as part of the event with the dates. Each event will have the steps listed with a planned date and actual date.

Steps (9)			
Step	Planned	Actual	Complete
Receive Application	04/21/2020	04/21/2020	Yes
Staff Screening	04/21/2020	04/21/2020	Yes
Assigned for Review	04/21/2020	04/21/2020	Yes
Receive Review Determination	04/21/2020	04/21/2020	Yes
Notify Requestor of Determination	04/21/2020	04/21/2020	Yes
Assign for Production	04/21/2020	04/21/2020	Yes
Production Due Date	04/25/2020	04/21/2020	Yes
Data Delivered	04/21/2020	04/21/2020	Yes

For example in this event the following has occurred:

- CDPH received the application on 04/21/2020.
- CDPH screened the application on 04/21/2020.
- CDPH assigned the application for review on 04/21/2020.
- CDPH received the review determination on 04/21/2020.
- CDPH notified requestor of determination on 04/21/2020.
- CDPH assigned production on 04/21/2020.
- CDPH set a production due date on 04/21/2020.
- CDPH delivered the product on 04/21/2020.

When CDPH has completed these actions, the complete field will be marked 'yes' and a completion date will appear.

Ensure 'Hide Skipped' is checked otherwise you'll see steps not applicable to that project.

4.8 Actions in the Event Details

Actions in the event details screen are as follows:

- Attachments: shows the attachments related to the event detail
 - Generated Docs: shows the approval documents associated with the event
- xForms : shows the form used to create the event
- Done: returns the requester to the next most logical page depending on previous actions

4.9 Further Questions

If you have further questions regarding your project status or using CDPH VSA, contact CDPH at HIRS@cdph.ca.gov.