IWEB APPLICATION USER GUIDE

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1 IWEB APPLICATION INTRODUCTION

The **IWEB** application is a software application that runs on your Internet Explorer browser for the **State Immunization Information System (SIIS)**. It provides patient immunization resource management and administration tools that work together to help perform patient immunization management tasks.

Depending on the access authorization, the following can be performed:

- Search for patients in the central registry (also referred to as the state registry database, or the central database)
- Create/Edit patient demographics (first name, last name, address, city, state, etc.)
- Create/Edit vaccination records (current and historical)
- Create/Edit names of physicians and vaccinators
- Create/Edit vaccine inventory information (lot numbers, manufacturers, etc.)
- Create/run reports
- Submit queries and reports for reminder/recall appointments
- Send imports to the central registry (upload external data to the central registry; i.e., billing systems, vital records, Medicaid, etc.)

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2 ABOUT THIS GUIDE

The **IWEB End User's Guide** was prepared for you to use as a reference book. It includes step-by-step instructions with illustrations that show you "how" to use the **core** application.

What is the **core IWEB** application? It includes the following menu options:

- Home (Login/Logout/Select IRMS/Select Application)
- Patient
- Vaccinations
- Facilities
- Physicians/Vaccinators
- Lot Numbers
- CASA Export
- Reminder Recall
- Imports (Send uploads to the central registry)
- Reports (Patient Record, Reports Module, and State Reports)
- Help

Note: Other options or modules that may be used with IWEB are considered to be separate modules because they can run as a "stand-alone." If you use a different option and do not see it in the above list or within this guide, it will have its own User's Guide. For example: Management Reports.

For new users of the application, User Task Maps (with menu options) have been included to assist you in the following:

- Initial Setup Tasks that "must" be Performed

- Frequently-Used Tasks
- Other Available Tasks

DOCUMENTATION STANDARDS AND CONVENTIONS

The documentation standards and conventions used are:

- Menu names, options, and commands are printed in bold type and capitalized. For example: Point and click the **FILE** menu, and then select **SAVE**.
- Actions to perform are printed in bold using upper and lower case. For example: Perform a **Patient Search**.
- Dialog boxes and application windows are enclosed in quotes and first letter capitalized. For example: The "Physician/Vaccinator Maintenance ADD" window appears.
- Important notes are indicated with the word note and printed in bold italics. For example:

  Note: If you do not see ACCESS GRANTED, you will need to re-enter an accurate USERNAME and PASSWORD in order to continue.

- Field names and descriptions are isolated in consistent formatted tables.
- Footers contain section and page number.
- Alternating headers contain Title of the Guide, Section Name, and associated graphics.
- Text that is typed by an end-user appears in Courier font, so you can easily read it in the document. For example:

  `Lincoln Medical Center`

- Every document includes a Table of Contents, an illustration of every application window, with an explanation of the window's purpose, and steps to maneuver the window.

- Every application guide includes tips on using the application, such as entering data into fields, keyboard and editing keys, and application characteristics (such as drop-down menus, radio buttons, checkboxes, etc.).

PRINTING THIS GUIDE

This guide uses a double-sided layout; hence, when printing the guide, send the printout to a duplex printer.

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3 ACCESS AUTHORIZATION & PRIVILEGES

There are six levels of user access set up at the registry level using the PCI 2000 Administrator's Web User Maintenance option.

Depending on your user access, you will either have **Client** or **View**(ing) privileges. The major difference is:

- **Client** – **READ** (view) and **WRITE** (add new and modify) information.
- **View** – **READ** (display) information only – no changes may be made.

There are various types of users:

- Facility Client
- Facility View
- IRMS Client
- IRMS View
- Registry Client
- Registry View
- Vendor View
- County View

The level of access for each type of user is shown in the table. This table is inclusive of all SIIS Registry Modules.

Table 3-1: Access Authorization & Permissions

	Facility Client	Facility View	Health Promotions Client	IRMS Client	IRMS View	Mass Immunizations	Paper Data Entry	Provider Recruiter	Registry Client[1]	Registry View	School Nurse[2]	School Nurse Coordinator[3]	Vendor View
Iweb Core	X	X		X	X				X	X			X
Block Adverse Reaction	X	X		X	X			X	X	X	X	X	
Block Contraindication	X	X		X	X				X	X	X	X	
CDC Comm Access									X		X	X	
DTT Export Source Option	X			X					X		X	X	
DTT Import Access	X			X	X				X	X			X
DTT Profile Creator	X			X					X		X	X	X
Delete Patient Access									X				
Facility Administration				X				X	X		X	X	
First Responder Access	X	X		X	X				X	X			
HEDIS Assessment	X			X					X		X	X	
Health Promotions Administrator									X		X	X	
Lead Management Access	X	X		X	X				X	X	X	X	
Lead View Access	X	X		X	X				X	X	X	X	
Lot Number Manager access	X			X		X			X		X	X	
Management Reports	X	X		X	X			X	X	X	X	X	
Map Designer Access	X	X		X	X				X	X	X	X	
Physician Administration	X			X				X	X		X	X	
Provider Recruitment Administrator								X	X		X	X	

	Facility Client	Facility View	Health Promotions Client	IRMS Client	IRMS View	Mass Immunizations	Paper Data Entry	Provider Recruiter	Registry Client[1]	Registry View	School Nurse[2]	School Nurse Coordinator[3]	Vendor View
Registry Settings									X		X	X	
Remote Clinic Export	X			X					X		X	X	
Risk Assessment Access	X	X		X	X		X	X	X	X	X	X	
Security Access	X	X		X	X				X	X	X	X	
Suppress Demographic Address Check	X			X				X	X		X	X	
System Administration	X			X				X	X		X	X	
Terminate Session									X		X	X	
UFM Access	X	X		X	X			X	X	X	X	X	
Upload HL7 Access	X			X									
VACMAN Export	X	X		X					X				
Wait List Access	X	X	X	X	X	X	X	X	X	X	X	X	X

[1] For User-ID Creation
[2] Select Schools for their county only
[3] Select Schools for no county or multiple Counties

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4 MAIN MENU: LOGGING IN & OUT

If your state is using Single Sign-On (SSO), please refer to **Appendix B** for instructions on how to request your SSO Username and Password, as well as how to sign onto SSO.

The **Main Menu** offers the following options:

- Home
- Login
- Logout
- Select Application
- Select IRMS

Once you click the **LOGIN** option and the "STC Web Login" window appears, you can request access (username and password) to the application or request a new password.

ENABLING YOUR SETTINGS

There are some settings that should be enabled before logging into the application. This reminder appears on the "Web Login" window.

1. **ENABLE** your browser to **ACCEPT COOKIES**.
2. **ENABLE** your browser for **SCRIPTING**.
3. **DISABLE** your browser for **POP-UP BLOCKER**.

Refer to **Appendix C** for instructions.

LOGGING IN TO THE APPLICATION

The process of logging into the application is done in two steps:

- Starting the Browser.

- Logging into the application.

Note: When a Username and Password are created, it is assumed this information is to be kept confidential.

If you are an **IRMS CLIENT** user, a facility selection can be used to limit your lot number selection when administering shots and will appear when you log in.

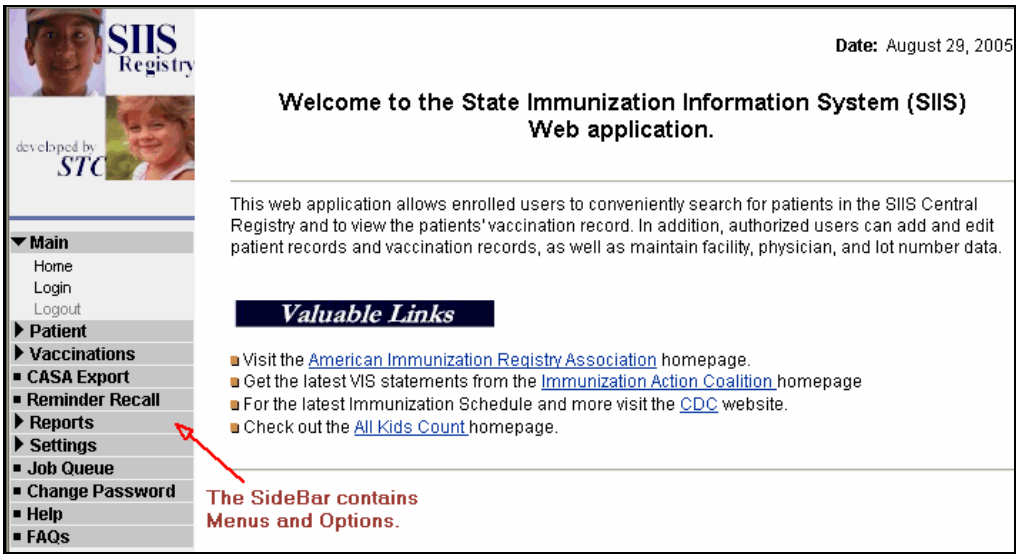
1. Open **Internet Explorer (IE)** and enter the web address for your state's immunization web site. For example,

`http://www.immunizationregistries.com`

The "Welcome to the State Immunization Information System (SIIS)" window appears.

Note: This window is also referred to as the "Home" window. It appears when the **HOME** option is clicked.

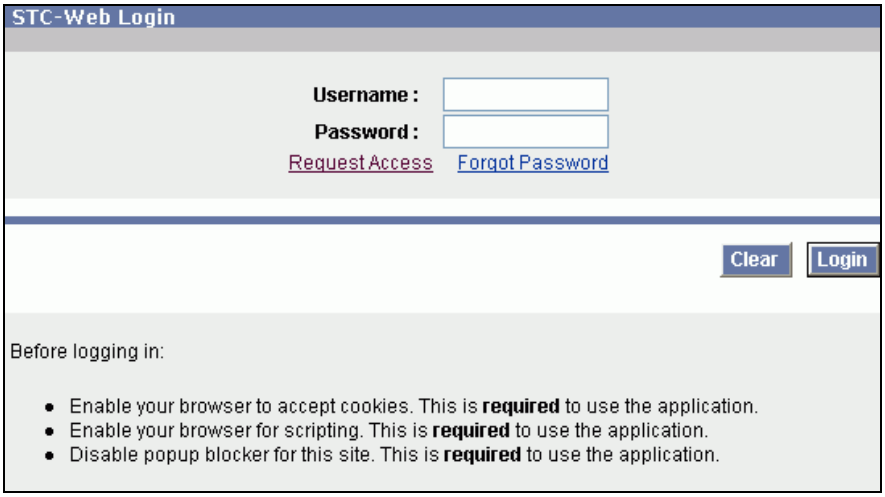
Figure 4-1: Home - Welcome Window



2. Locate the **MAIN** menu on the left side of the window's SideBar and point and click on the **LOGIN** option. One of two windows may appear depending on whether you are using SSO or not, or whether you have been granted application access.

- If you have not been granted access and need to request application access, the "Request Access for an Application" window appears. Refer to Appendix B for instructions.
- If you have been granted access, the "**Web Login**" window appears with the mouse pointer positioned in the username field.

Figure 4-2: SIIS – Web Login



Note: If configured for your state, two hyperlinks may appear below the "Password" field. The hyperlinks are used to **REQUEST ACCESS** to obtain a username/password, and **FORGOT PASSWORD** to send an email to request your password. Refer to their respective sections in this chapter for more instructions.

3. The fields and their descriptions are listed in the table:

Figure 4-3: STC Web Login Fields

FIELD	DESCRIPTION
USERNAME	This is your login id that allows you to access the application.
PASSWORD	This is your confidential password that is associated with the Username and allows you to access the application.

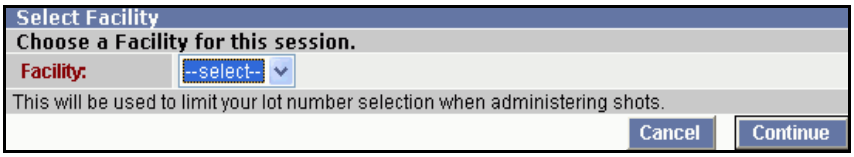
4. Type your **USERNAME**, press the **TAB** key, and then type your **PASSWORD.**

5. Press one of the available buttons:

   - **CLEAR** – to erase text from the fields.

   - **ENTER** (or click the **LOGIN** button) – to process the information. Depending on your User Permissions, one of three windows will appear. The "Select Facility," "Select IRMS," or the "Access Granted" window.

Figure 4-4: Select Facility



a) When the "Select Facility" or "Select IRMS" window appears, click the drop-down arrow to select a Facility/IRMS and then click the **CONTINUE** button; OR, click on **CANCEL** to not select a facility and assume the IRMS Client access and privileges.

Note: A facility is used to limit your lot number selection when administering shots.

Figure 4-5: Access Granted

b) The "Access Granted" window appears when you have entered an accurate Username and Password. If you do not see this window, you can click on the Forgot Password link, if your state uses it, or contact your administrator for a new Password.

Note: Depending on your access authorization, different menus and options may be available. Available options display in **bold** lettering, unavailable options display in gray.

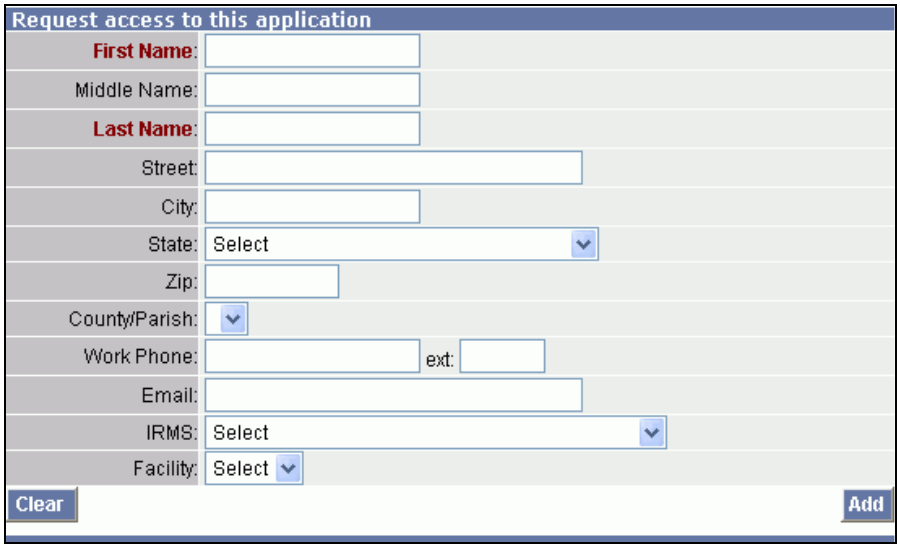
6. You are ready to select from the Menu and begin using the application. Continue to the next section.

REQUEST ACCESS

This option is used to request access to the application unless you are using Single Sign-On (SSO). If you are using SSO, please refer to Appendix B; otherwise, perform the following:

1. Click on the **REQUEST ACCESS** hyperlink. The "Request access to this application" window appears.

Figure 4-6: Request access to this application



2. The fields and their descriptions are listed in the table:

Table 4-1: Request access to this application Fields

FIELD	DESCRIPTION
FIRST NAME	Type your first name. This is a required field.
MIDDLE NAME	Type your middle name (optional).
LAST NAME	Type your last name. This is a required field.

FIELD	DESCRIPTION
STREET	Type the street address (optional) of the location where you will be using the Username.
CITY	Name of the city where you will be using the username.
STATE	Click the drop-down menu arrow to select the state name of the location you will be using the username. After a STATE is selected, the "Select Zip Code" dialog box appears. Locate the appropriate zip code and click the SELECT button.
ZIP	Zip code of the location where you will be using the username. After a STATE is selected, the "Select Zip Code" dialog box appears. Locate the appropriate zip code and click the SELECT button. The zip code will automatically populate the ZIP field.
COUNTY/PARISH	Click the drop-down menu arrow to select a county or parish.
WORK PHONE	Phone number where you will be using the username.
EXT	Extension number where you will be using the username.
EMAIL	Email address where your username and password can be sent.
IRMS	Click the drop-down menu arrow to select your IRMS identifier.
FACILITY	Click the drop-down menu arrow to select your FACILITY.

3. At a minimum, fill in the "RED" labeled fields. It is recommended that you enter as much information as possible.

4. Click one of the available buttons:

- **CLEAR** – erases any data from the fields and remains on the same window.
- **ADD** – submits your request and re-displays the "Welcome to the State Immunization Information System (SIIS)"

window with a message at the top of the window confirming your request. You will be notified via email of your request.

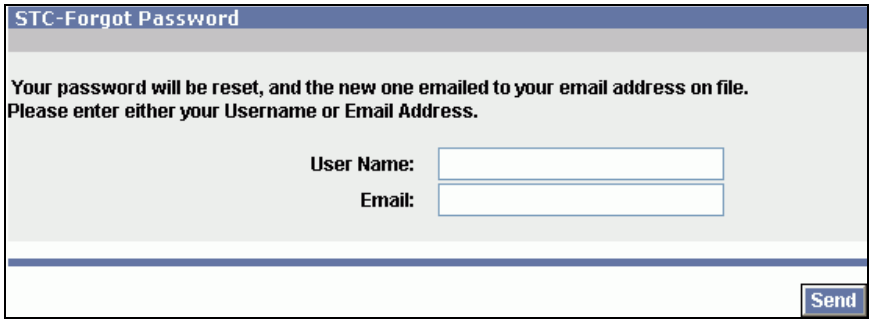
FORGOT PASSWORD

The "Forgot Password" option is a hyperlink that is state configurable by your System Administrator. It is used when you don't remember your password. You can click on this hyperlink and request a new password be sent to you.

If you have forgotten your password and need to request a new one, perform the following:

1. Click the **FORGOT PASSWORD** link. The "Forgot Password" window appears.

Figure 4-7: Forgot Password



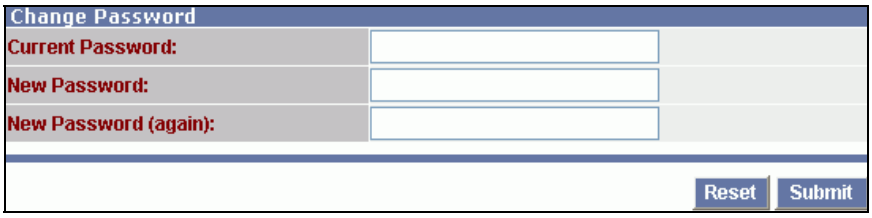
2. Type one of the following
   - **USERNAME** – type your username. If you type your username, your new password will be emailed to your email address on file.
   - **EMAIL** – type your email address. If you type our email address, your new password will be emailed to this email address versus the one on file.
3. Click the **SEND** button. The system will generate an automatic and immediate response and reply to your request by sending the new password in an email (similar to the one shown below).

Figure 4-8: New Password Assignment Email Reply

4. Log into the application using the **NEW PASSWORD**.

5. From the Menu, click on the **CHANGE PASSWORD** hyperlink (also state configurable) to change your password to what you want it to be. The "Change Password" window appears.

Figure 4-9: Change Password



6. Type the **CURRENT PASSWORD** (the one you just received via email), and press the TAB key.

7. Type the **NEW PASSWORD** (to what you want it to be) and press the **TAB** key.

8. Type the **NEW PASSWORD** again and click one of the buttons:

- **RESET** – erases the data from the fields you typed in and prepares the window for you to re-enter data.
- **SUBMIT** – saves your entries and changes your password.

Figure 4-10: Password Changed Successfully Message

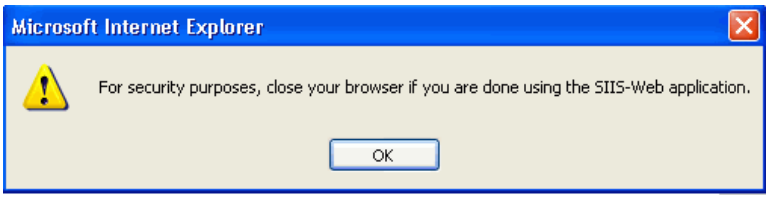
9. It is not necessary to log out and back on but the next time you login, use the new password.

LOGGING OUT OF THE APPLICATION

When you are finished using the application, you should log out of the application.

1. From the **MAIN** menu, point and click on the **Logout** option. A dialog box appears indicating to close the browser if you are finished.

Figure 4-11: Close Browser Dialog Box



2. Click the **OK** button. Another "Internet Explorer" dialog box appears.

Figure 4-12: Web Page Closure Verification Dialog Box

3. Click the **YES** button to close the browser window. The application and browser window are completely logged off.

SELECTING AN APPLICATION

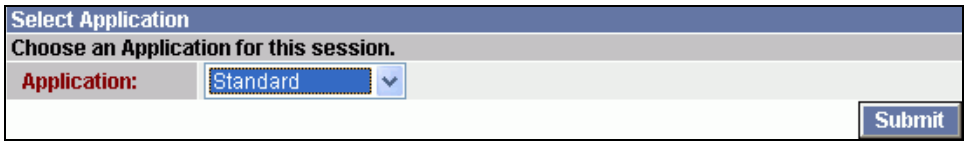
This option is used by when user needs to switch between different applications.

Note: The default application is set using the **SETTINGS** menu, **Personal** option, **User Preferences** section, default application setting.

To select a different **APPLICATION**, perform the following:

1. From the **MAIN** menu, click on the **SELECT APPLICATION** option. The "Select Application" window appears:

Figure 4-13: Select Application



2. In the **APPLICATION** field, click on the drop-down menu arrow to view/select the appropriate application.

3. Click on the **SUBMIT** button. The “chosen” application’s “Welcome” window appears.

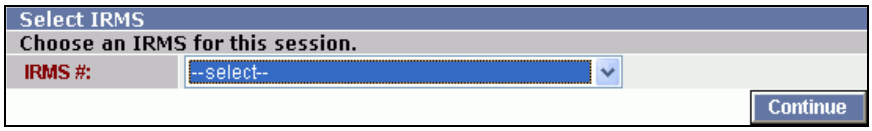
SELECTING AN IRMS

This option is used when you need to switch from one IRMS to another and do not want to logout of the application.

To select a different **IRMS**, perform the following:

1. From the **MAIN** menu, click on the **SELECT IRMS** option. The "Select IRMS" window appears.

Figure 4-14: Select IRMS



2. In the **IRMS** field, click the drop-down menu arrow to view/select a valid choice.

3. Click the **CONTINUE** button. The "Patient Search" window appears. Continue to the desired section.

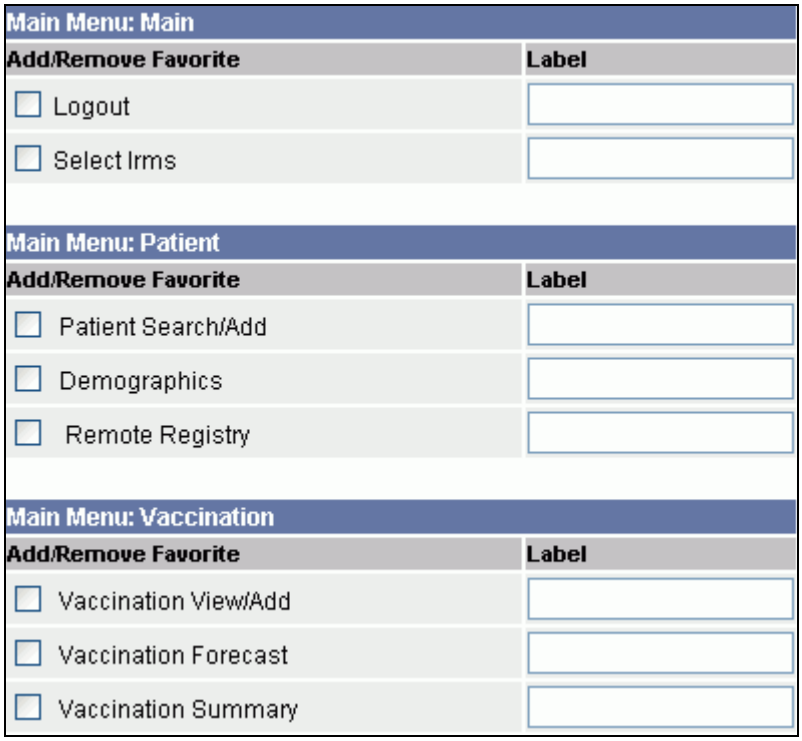
5 FAVORITES MENU

The "Favorites Menu" provides the option to add the most frequently used options to the menu list, as well as provide a new name (label) for the option.

To add/edit a frequently used item, perform the following:

1. From the "Favorites Menu," click on the **ADD/EDIT FAVORITES** option. The "Add/Remove Favorites" list window appears:

Figure 5-1: Add/Remove Favorites List



2. This window is organized by menu name with the available options per menu. The list of options will differ depending on the applications and access level being used.
3. Locate the menu for the desired option and perform the following:
   - Click the checkbox to enable the option.

- Optionally, type a new name for the label. For example, click the Logout option and type a new label of Logout of Appl.

4. Click the **SAVE** button. The option and new label will appear under the "Add/Edit Favorites" option.

Figure 5-2: Favorites Menu Option Added

Note: The original option remains in the same place.

6 ABOUT THE APPLICATION

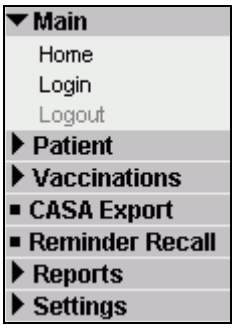
This section describes the application characteristics that are used on all the windows and includes tips for entering text and using the keyboard and mouse.

Note: Refer to the "SIIS Installation Guide" for the SIIS-IWEB System Requirements.

APPLICATION CHARACTERISTICS

Common features on the application windows are described in the table.

Table 6-1: Application Characteristics

APPLICATION CHARACTERISTICS	
MENUS & OPTIONS  	Every application will have a Menu displayed on the left side. Directly below the Menu Name are options that are available. If an option is "grayed" out, it is not an available option. • An upside down triangle indicates the menu is open. • A triangle pointing right indicates the menu is closed. • A square indicates a single menu without options. Click on the triangle to open the menu to view its options and/or to close the menu. Click the square to open the menu.
DROP-DOWN MENUS 	Drop-down menus are displayed when the drop-down arrow is clicked. A list of valid entries will appear in alphabetical order or the most frequently used order. While the menu is displayed, you may type the first letter of the word and the highlighter will position on the first occurrence. To locate the next occurrence, type the letter again.
MANDATORY FIELD ENTRIES	RED field labels indicate an entry is required before proceeding.

APPLICATION CHARACTERISTICS	
CHECK BOXES	Press the **TAB** key to move through the checkboxes. Press the keyboard **SPACEBAR** (or point and click) to select the item next to the checkbox, or press it again to deselect the item.
RADIO BUTTONS	Press the **TAB** key to move to the desired set of radio buttons. Press the directional keyboard ARROW (or point and click) to select (highlight) the desired radio button.
SELECT ARROWS	Select arrows appear when there is a list of items to choose from. They appear after a search result displays. Point and click it to select the item it is pointing to.
ERROR MESSAGES	If the wrong type of data is entered into a field, an error message appears usually at the top of the window.
Note: While editing, the patient's record will be locked from any other user accessing it. Remember to "save" when finished editing.	

ENTERING DATA INTO THE FIELDS

When entering data into the fields, the following information describes the recommended methods.

Table 6-2: Entering Data into Fields

ENTERING DATA INTO THE FIELDS	
DATA STORAGE (UPPERCASE)	The application is not case-sensitive and data is stored (in the database) in capital (uppercase) letters.
DATES	The application pads the date fields with a forward slash (/) between month, day, and year. Dates can be entered in the following formats: • mmddyyyy • mmddyy

ENTERING DATA INTO THE FIELDS	
SOCIAL SECURITY NUMBER	The application pads the social security number with the dash (-) in the appropriate places. You may enter the numbers without dashes; i.e., 123456789
PHONE AND FAX NUMBERS	The application pads the phone and fax numbers with parenthesis ( ) for the area code and a dash (-) between the three digit prefix and four digit suffix. You may enter phone and fax numbers without the dashes and parenthesis; i.e., ##########
ZIP CODES	The application pads the zip code fields with a dash (-) if the entire 9-digit number is entered. Zip codes can be entered as 5-digits or 9-digits without the dash(es).

USING THE KEYBOARD AND MOUSE

When using the keyboard and mouse, the following information in the table describes some suggestions.

Table 6-3: Keyboard, Editing Keys, and Mouse

KEYBOARD, EDITING KEYS, AND MOUSE	
TAB **ALT TAB**	All the fields have a "**TAB**" order. This means when the cursor is in a field and the TAB key is pressed, it will move the cursor to the next field. By pressing the "**ALT** with **TAB**," the cursor will move backward to the previous field.
ENTER	Pressing the "**ENTER**" key on most windows, executes the function to process the active page. For example, while on the Patient Search window, the ENTER key will execute the Search function. An exception to this rule is when the TAB key is pressed that highlights a button, the ENTER key executes the button that is highlighted.

KEYBOARD, EDITING KEYS, AND MOUSE	
Note: The Cut, Copy, and Paste functions may work differently on some windows and/or computers. Try using different combinations to get the desired result.	
CUT	Highlight the data to be cut, then perform one of the following: • CTRL + X • Right-click the mouse and select Cut from the menu • Select Edit from the toolbar and then select Cut • Shift + Delete
COPY	Highlight the data to copy, then perform one of the following: • CTRL + C • Right-click the mouse and select Copy from the menu • Select Edit from the toolbar and then select Copy • CTRL + Insert
PASTE	Left-click the mouse where you want to place the data and perform one of the following: • CTRL + V • Right-click the mouse and select Paste from the menu • Select Edit from the toolbar and then select Paste • Shift + Insert
SCROLL MOUSE	The scrolling mouse wheel can be used to scroll through selected drop-down lists and current web page, if the mouse is programmed correctly.

USER TASK MAPS – WHERE TO START (AT-A-GLANCE)

There are three task maps shown on the next three pages. The first map guides you through the **initial setup tasks that should be done** to setup the application and the order in which to perform them. The second map reveals **frequently used tasks**, and the third map shows you **other available tasks**.

These maps also show which menu option to use in order to complete the task.

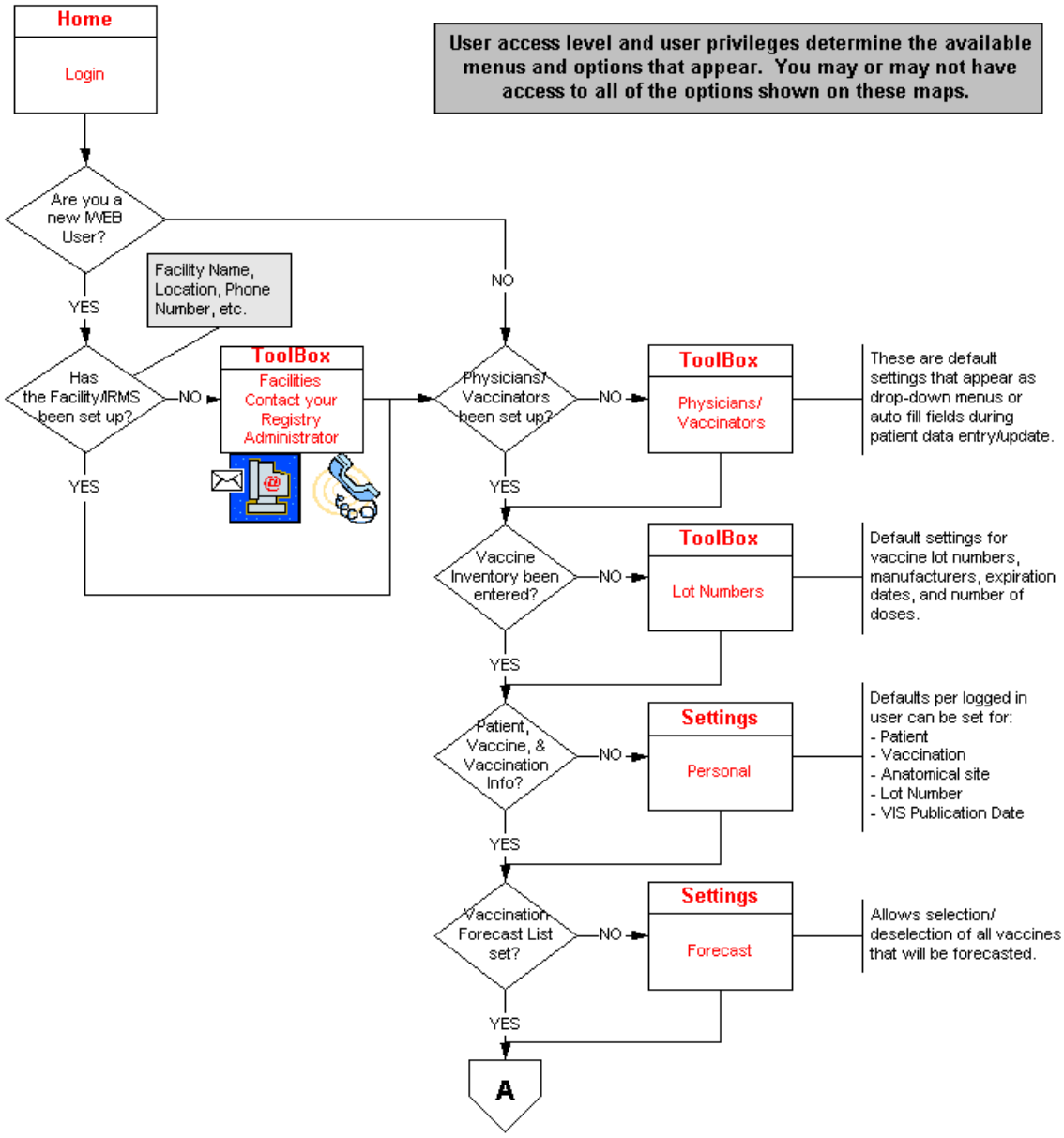
It is assumed that you know your user access level and whether you are a **Client** (able to make changes) or a **Viewer** (not able to make changes).

Please contact your local area Help Desk if you are unsure what type of access you have, or if you believe you require a different level of access.

INITIAL SETUP TASKS THAT MUST BE PERFORMED

This map reveals the recommended setup steps that **must be done** to effectively use the application.

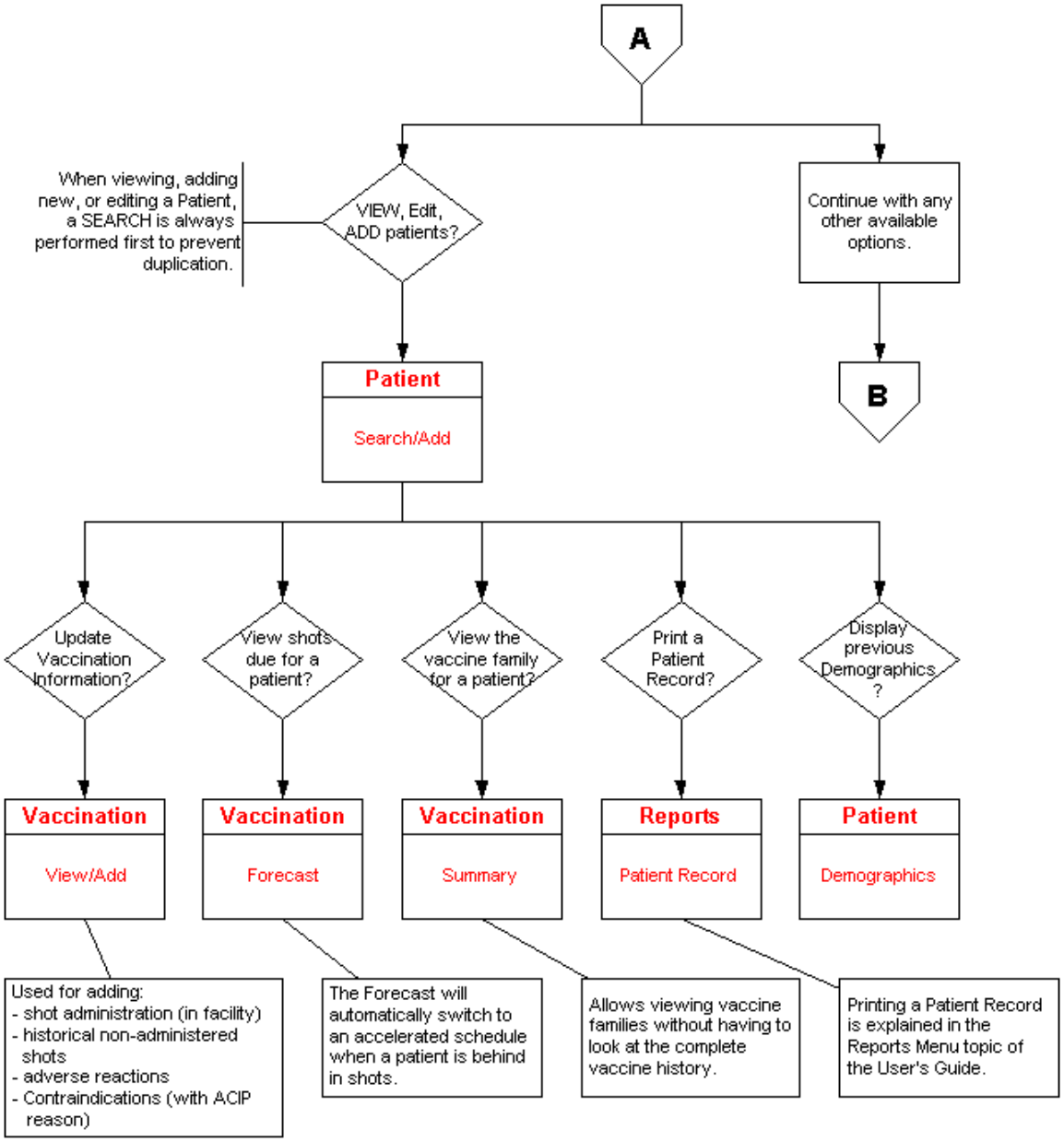
Figure 6-1: Tasks that must be Performed Illustration



FREQUENTLY-USED TASKS

This map reveals frequently used options.

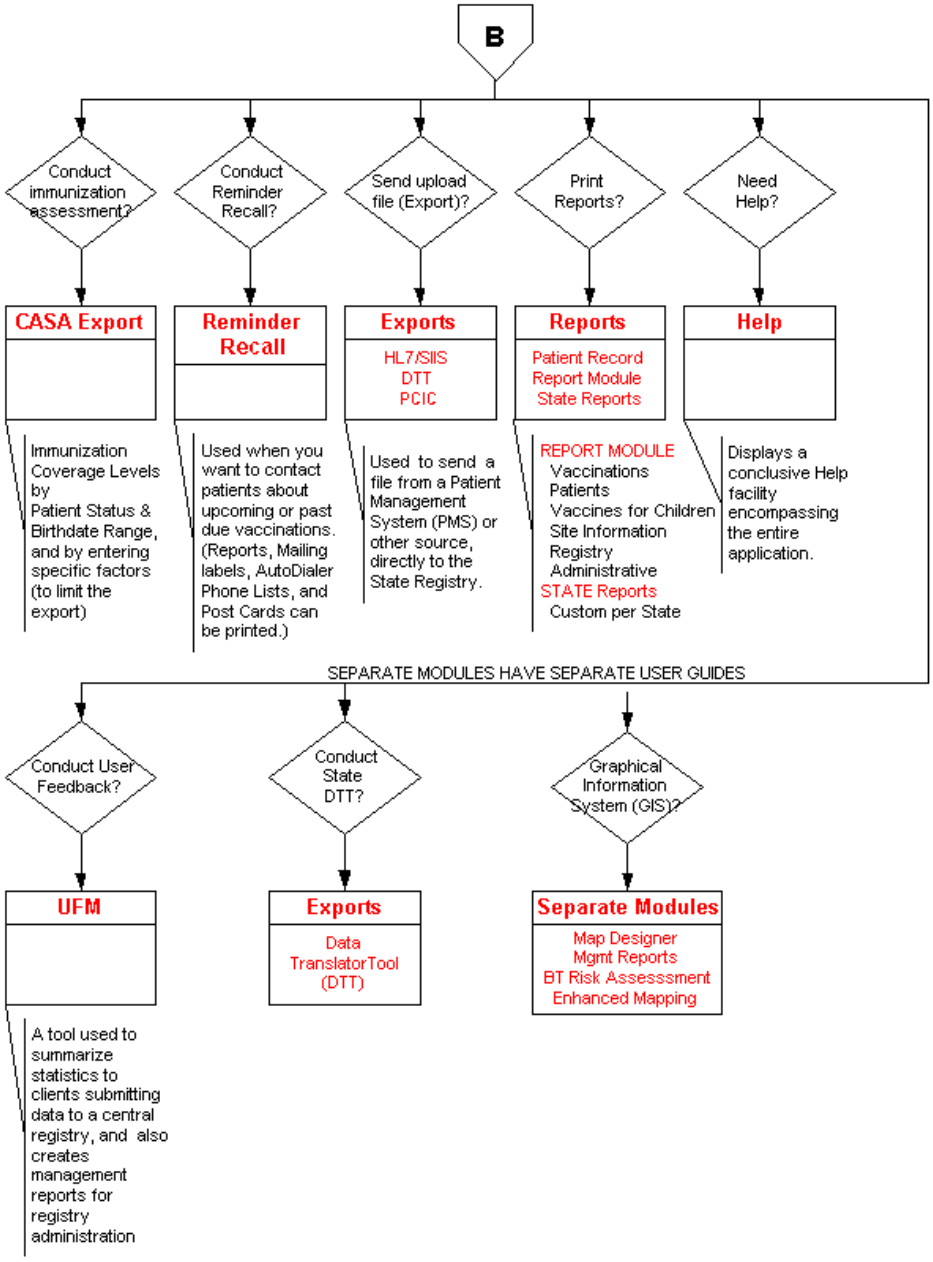
Figure 6-2: Frequently Used Tasks



OTHER AVAILABLE TASKS

This map reveals additional tasks that are available.

Figure 6-3: Other Available Tasks



7 FACILITIES MENU

The purpose of the **FACILITIES MENU** is to **Search, Add**, and **Edit** names of Facilities (Clinics) for the purpose of consistency and avoid redundancy.

Note: Facilities are usually setup by a person at the Registry level so most users will not have access to set up a facility.

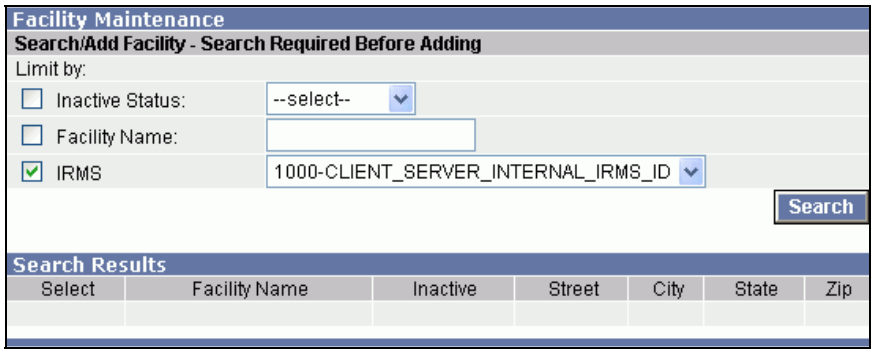
You may also add a new IWEB user immediately after adding a facility provided you are authorized to do so. A checkbox appears on the Facility Add window that will invoke the "Web User Maintenance – Add" portion of the IWEB application. More information is available in the section titled, "Adding a Facility."

SEARCHING FOR A FACILITY

Although facilities are typically setup by a person at the Registry, it is included within this manual since it is part of the IWEB application.

1. From the **FACILITIES** menu, point and click on the **Search/Add** option. The "Facility Maintenance - Search" window appears.

Figure 7-1: Facility Maintenance



2. The fields and their descriptions are listed in the table:

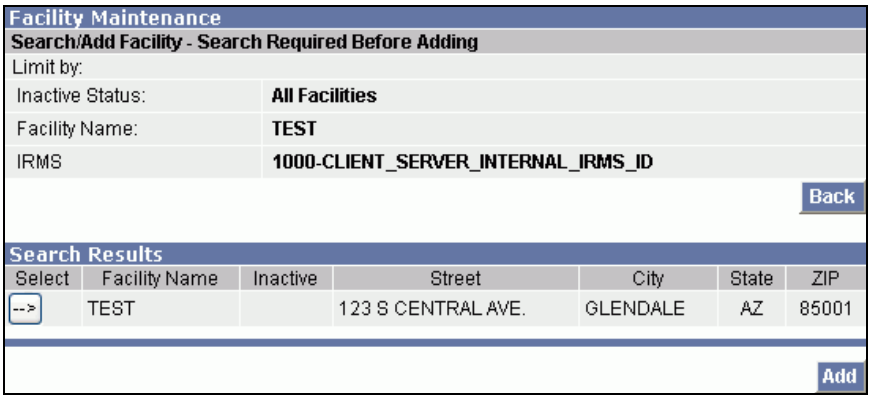
Table 7-1: Facility Maintenance Field Descriptions

FIELD	DESCRIPTION
INACTIVE STATUS	Status of the Facility. All, Active or Inactive. Click the drop-down menu arrow to view/select the Facility status, or allow the –select- to search for All.
FACILITY NAME	Type the name of the Facility. The Facility checkbox will automatically get selected. Click the **SEARCH** button.
IRMS	Click the drop-down menu arrow to view/select a valid IRMS. **Note**: A state configurable option is available to have the IRMS field automatically populate.

3. Select/type data into the fields and then click the **SEARCH** button.

- If a match is located, the **SEARCH** Results appear in the bottom half of the window.

Figure 7-2: Facility Maintenance with Search Results



- If a match is **NOT** located, the **SEARCH** Results will appear empty.

4. Click on one of the available buttons:

- **SELECT ARROW** – click the SELECT arrow to select from the Search Results list. Continue to the section titled, "Editing a Facility."
- **BACK**– to return to the "Facility Maintenance" window and try another search. Repeat from step 2 above.

- **ADD** – to add a new Facility. The "Facility Maintenance Add" window appears. Continue to the section titled, "Adding a Facility."

ADDING A FACILITY/CLINIC

If you attempt to add a facility that is already entered in the application, a message appears indicating the facility already exists.

1. Perform a **SEARCH** on the **Facility**.
2. Click on the **ADD A FACILITY** button. The "Facility Maintenance Add" window appears with the Facility name already filled in if you typed it in.

Figure 7-3: Facility Maintenance [Add]

Facility Maintenance [Add]	
Facility Name:	SUNSET
Facility Display Name:	
IRMS:	1000-CLIENT_SERVER_INTERNAL_IRMS_ID
Street:	○ P.O. Box: Physical Address: ◉ Street:
City:	
State:	--select--
ZIP Code:	
County/Parish:	--select--
Phone Number:	
Phone Number Extension:	
Fax Number:	
Email:	
Primary Contact First Name:	
Primary Contact Last Name:	
Inactive:	☐
Automatic Ownership Blocked:	☐
VFC Pin:	
Do not allow administration of public vaccine to VFC ineligible patients:	☐
Facility Designation:	☑ Facility ☐ Employer ☐ Lab
Facility Type:	--select--
Referring Organization Category (FRITS):	--select--
Reporting Method:	--select--
Facility Group:	◉ None ○ Facility Group Owner ○ Facility Group: --select--

Add user following facility creation ☐

Cancel | Reset | Save

3. It is recommended to type in as much information as possible. At a minimum, you must enter data into the **RED** labeled field. The fields and their descriptions are defined in the table below.

Table 7-2: Facility Maintenance Fields

FIELD	DESCRIPTION OF USE
FACILITY NAME	Full and complete name of the facility you are adding. This name is automatically entered for you and is the name you initially performed a search on.
FACILITY DISPLAY NAME	Short name or abbreviation of the facility you are adding. There is room to enter a maximum of 30 characters. If this field is filled in, this abbreviated name will appear in the drop-down lists for ALL windows displaying the Facility name.
IRMS	If you are an IRMS Client user, you will be required to view/select an IRMS by clicking the drop-down menu arrow. **Note**: A state configurable option is available to have the IRMS field automatically populate.
STREET	The **P.O. Box** and **Physical Address** fields are used together; otherwise, use the **Street** field.
CITY	City name of the facility location.
STATE	State name of the facility location. Click on the drop-down arrow for a valid list and click to highlight your selection.
ZIP CODE	Zip code of the facility location.
COUNTY/PARISH	You must enter the City name and State abbreviation before attempting to select the COUNTY/PARISH drop-down list; otherwise, the list will display empty.
PHONE NUMBER	Telephone number of the facility. If a phone number with repeating digits is entered such as 111-1111, an error message will appear.
PHONE NUMBER EXTENSION	Extension number associated with the facility's phone number.
FAX NUMBER	Facsimile number of the facility. If a phone number with repeating digits is entered such as 111-1111, an error message will appear.

FIELD	DESCRIPTION OF USE
EMAIL	Email address for the facility.
PRIMARY CONTACT FIRST NAME	First Name of the contact person at the facility.
PRIMARY CONTACT LAST NAME	Last Name of the contact person at the facility.
INACTIVE	If the checkbox contains a "check," the facility is INACTIVE; otherwise, the facility is ACTIVE. Since records cannot be deleted, placing the facility inactive flags it so it cannot be used.
DISTRICT/REGION	This must be a whole number and be known by the user adding/editing the facility. **Note**: A state configurable option is available to have the District field automatically populate.
AUTOMATIC OWNERSHIP BLOCKED	If the checkbox contains a check, the facility cannot own patient and vaccination records. A facility with blocked ownership will not display in the drop-down list on the patient demographics screen. When adding an administered vaccination, the facility on the patient demographics window will not be populated with the facility from the administered shot.
VFC PIN	Vaccines For Children (VFC) Pin (Personal Identification Number).
DO NOT ALLOW ADMINISTRATION OF PUBLIC VACCINE TO VFC INELIGIBLE PATIENTS	If this checkbox is checked, a VFC vaccine cannot be administered to an ineligible patient. From the user's perspective, a warning message appears indicating to either modify the VFC status or administer a publicly supplied vaccine.

FIELD	DESCRIPTION OF USE
FACILITY DESIGNATION	When using the **First Responder** or **Lead** modules, this field allows the user to select the type of facility and is required. • **Facility** (the default) is chosen when neither the First Responder or Lead applications are being used. • **Employer** for **First Responder** users. • **Lab** for **Lead** module users. **Note:** If the state does not use First Responder or Lead, the Employer and Lab options will be hidden, and only Facility will display.
FACILITY TYPE	Type of facility. Click on the drop-down arrow to view a list of valid choices and make your selection. Examples are: Health Care Facility, Local Department of Health, Protective and Social Services, State Department of Health, Veterans Administration, etc. **Note:** This field only displays for states using First Responder.
REFERRING ORGANIZATION CATEGORY (FRITS)	This is the name of the organization that referred the facility. Click on the drop-down arrow to view a list of valid choices and make your selection. Examples are: Healthcare Response Team, Public Health Response Team, First Responder, etc. **Note:** This field only displays for states using First Responder.
REPORTING METHOD	Method the Facility uses for reporting. Examples are: • Direct data entry • DTT Import • Batch HL7 Click the drop-down menu arrow to view/select a valid choice.

FIELD	DESCRIPTION OF USE
FACILITY GROUP	Group of the facility. Examples are: • None • Facility Group Owner • Facility Group
ADD USER FOLLOWING FACILITY CREATION	If you are authorized and you desire to add a new web user, click the "Add user following facility creation" checkbox.

4. Click one of the available buttons:

- **SAVE** - to save your entry and return to the "Facility Maintenance Search" window or depending on your options, exit to the "Web User Maintenance-Add" window. Instructions for adding IWEB users can be located in the SIIS Administration User Guide.
- **RESET** – to erase your newly typed window and remain on the window; or
- **CANCEL** – to not save and return to the "Facility Maintenance Search" window.

EDITING A FACILITY

To edit a facility, perform the following steps:

1. Perform a **Search**. Refer to the section titled, "Searching for a Facility."

2. Select the facility you want to edit by clicking on the **SELECT ARROW**. The "Facility Maintenance [Detail]" window appears.

Figure 7-4: Facility Maintenance [Detail]

Facility Maintenance [Detail]	
Facility Name:	SUNSET
Facility Display Name:	SUNSET FACILITY
IRMS:	1000-CLIENT_SERVER_INTERNAL_IRMS_ID
Facility Id:	SIISCLIENT3
Street:	1 MAIN STREET
City:	PHOENIX
State:	AZ
ZIP Code:	85012
County/Parish:	MARICOPA
Phone Number:	(602)241-1502 Ext: 1112
Fax Number:	
Email:	
Primary Contact:	
Inactive:	No
District/Region:	
Automatic Ownership Blocked:	No
VFC Pin:	
Allow administration of public vaccine to VFC ineligible patients:	Yes
Facility Designation:	Facility
Reporting Method:	
Facility Type (FRITS):	
Referring Organization Category (FRITS):	
Facility Group:	SUNSET

Back Edit

3. Refer to the previous table for a list of field descriptions.
4. Click one of the available buttons:
   - **BACK** – to return to the "Facility Maintenance Search" window.
   - **EDIT** – to display the "Facility Maintenance Update" window.

Figure 7-5: Facility Maintenance Update

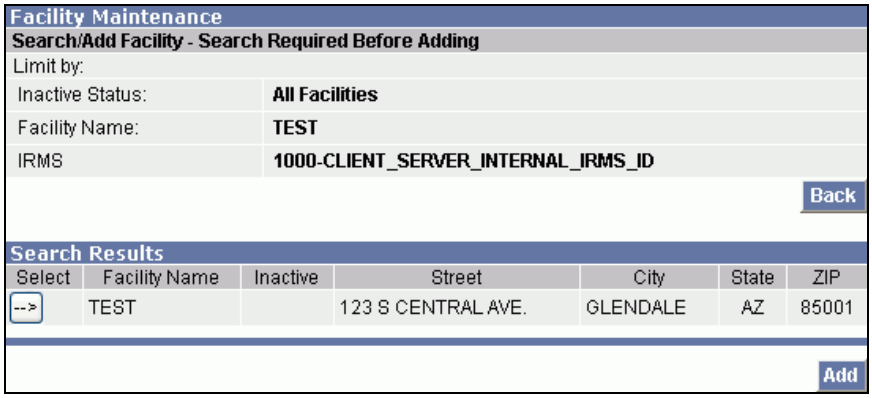
Facility Maintenance Update	
Facility Name:	SUNSET
Facility Display Name:	SUNSET FACILITY
IRMS:	1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Facility Id:	SIISCLIENT3
Street:	○ P.O. Box: Physical Address: ◉ Street: 1 MAIN STREET
City:	PHOENIX
State:	AZ
ZIP Code:	85012
County/Parish:	MARICOPA
Phone Number:	(602)241-1502
Phone Number Extension:	1112
Fax Number:	
Email:	
Primary Contact First Name:	
Primary Contact Last Name:	
Inactive:	☐
Automatic Ownership Blocked:	☐
VFC Pin:	
Do not allow administration of public vaccine to VFC ineligible patients:	☐
Facility Designation:	☑ Facility

5. Refer to the previous table for a list of field descriptions.
6. Type your new information into the appropriate field(s) and click one of the available buttons:
   - **SAVE** – to save and exit to the "Facility Maintenance [Detail]" window.
   - **RESET** – to erase your newly typed entries, redisplay what was previously entered, and remain on the same window.
   - **CANCEL** – to NOT save and exit to the "Facility Maintenance Search" window.

FACILITIES SEARCH RESULTS

This option re-displays the search results from a previous **FACILITY SEARCH**. If a Facility Search has not been performed, this option will be grayed out; hence, will be unavailable to you until a search is performed.

1. From the **FACILITIES** menu, point and click **SEARCH** (/**ADD**).
2. Perform a Facility Search.
3. From the **FACILITIES** menu, point and click **SEARCH RESULTS**. The "Facilities Search Results" window appears.



FACILITIES DETAIL

This option re-displays the facilities **DETAIL** from the most recently displayed Facility Detail record. If a Facility Search has not been performed, the DETAIL option will be grayed out; hence, will be unavailable to you until a search is performed.

1. From the **FACILITY** menu, point and click **SEARCH (/ADD).**
2. Perform a **FACILITY** Search.
3. From the **FACILITY** menu, point and click **DETAIL**. The "Facility Maintenance [Detail]" window appears.

Facility Maintenance [Detail]

Facility Name:	SUNSET
Facility Display Name:	SUNSET FACILITY
IRMS:	1000-CLIENT_SERVER_INTERNAL_IRMS_ID
Facility Id:	SIISCLIENT3
Street:	1 MAIN STREET
City:	PHOENIX
State:	AZ
ZIP Code:	85012
County/Parish:	MARICOPA
Phone Number:	(602)241-1502 Ext: 1112
Fax Number:	
Email:	
Primary Contact:	
Inactive:	No
District/Region:	
Automatic Ownership Blocked:	No
VFC Pin:	
Allow administration of public vaccine to VFC ineligible patients:	Yes
Facility Designation:	Facility
Reporting Method:	
Facility Type (FRITS):	
Referring Organization Category (FRITS):	
Facility Group:	SUNSET

Back Edit

4. If you want to edit the facility information, click on the **UPDATE FACILITY** button. Refer to the previous section for instructions, or click on a different menu option.

8 PHYSICIANS/VACCINATORS MENU

The purpose of the **PHYSICIANS/VACCINATORS MENU** is to Search, Add, and Edit names of Physicians/Vaccinators for consistency, and to avoid data entry redundancy. Adding this information allows the application's fields to automatically populate with the entered data.

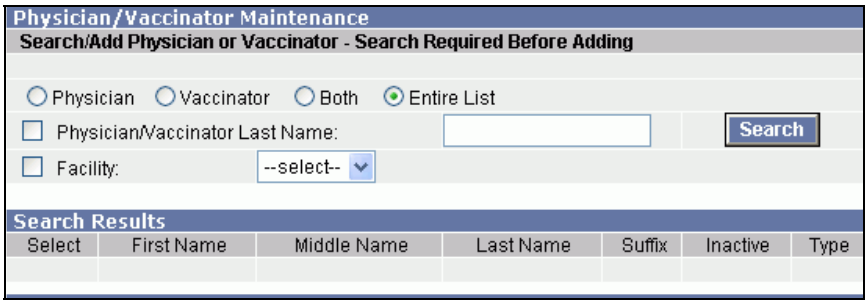
A physician is the primary care physician for the patient and can be selected on the patient record. A Vaccinator is a person that administers shots that can also be selected on the vaccination record.

SEARCHING FOR PHYSICIANS AND/OR VACCINATORS

A search is always performed prior to adding or updating any items to the IWEB application.

1. From the **PHYSICIANS/VACCINATORS** menu, point and click on the **Search (/ADD)** option. The "Physician/Vaccinator Maintenance" window appears.

Figure 8-1: Physician/Vaccinator Maintenance



2. Determine the type of search to perform:

- If you know (s)he is either a Physician or Vaccinator, point and click on either the **PHYSICIAN** or **VACCINATOR** radio button, respectively.
- If you are sure that (s)he is a Physician AND a Vaccinator, point and click on the **BOTH** radio button.
- If you are unsure if (s)he is a Physician, Vaccinator, or Both, point and click on the **ENTIRE LIST** radio button.

3. If you know the Physician/Vaccinator's Last Name or know the first few letters, type the letters or the entire name in the LAST NAME field.

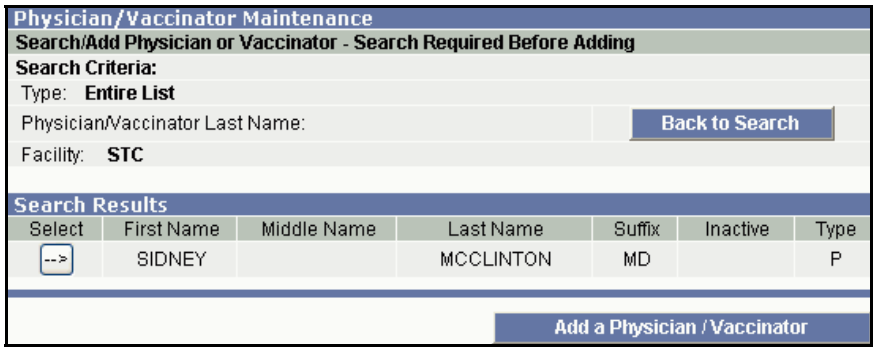
   Note: As soon as you start typing, the Physician/Vaccinator **LAST NAME** checkbox will automatically be selected.

4. If you know the **FACILITY** name, select it from the drop-down menu; or, type the first letter of the name to position the highlighter for the group. Each time you type the same letter, the next occurrence will be highlighted.

   Note: If a Facility Display (Abbreviated) Name was entered, it will appear in the list as opposed to the full name of the facility.

5. Point and click the **SEARCH** button. The Physician/Vaccinator Maintenance **SEARCH RESULTS** window appears (either with a result or not).

Figure 8-2: Physician/Vaccinator Maintenance with Results



6. Click one of the buttons:

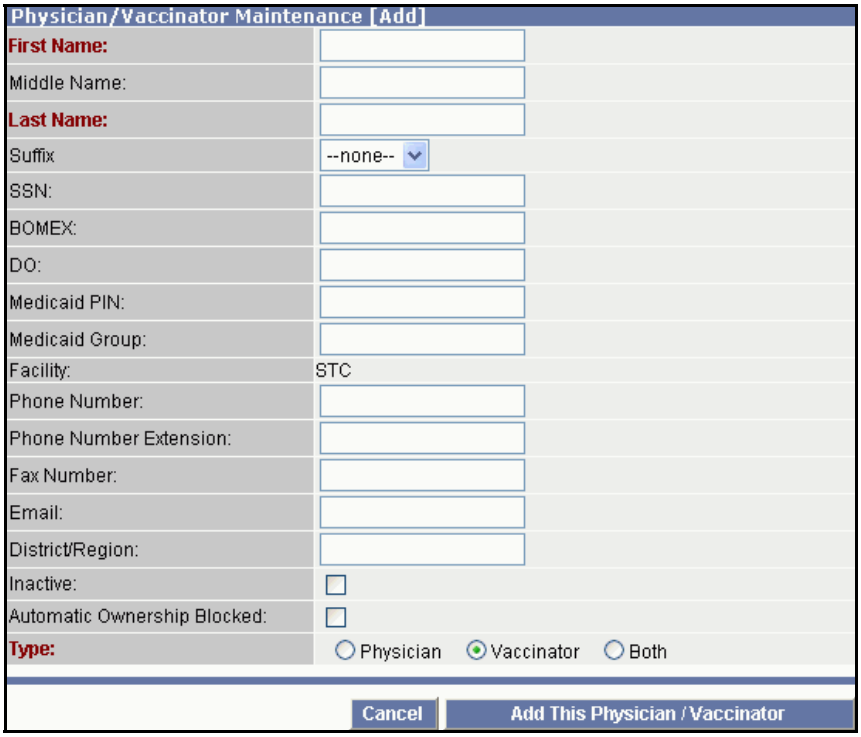
   - **BACK TO SEARCH** – to perform a new search. Repeat from step two above.
   - **ADD A PHYSICIAN/VACCINATOR** – to continue to add a physician/vaccinator. The "Physician/Vaccinator Maintenance ADD" window appears. Continue to the next section for instructions.

ADDING A PHYSICIAN/VACCINATOR

Enter the names of those within your facility who will be primary care physicians and those who will be administering vaccines; thus vaccinators.

1. From the "Physician/Vaccinator Search Results" window, click the **ADD** a **PHYSICIAN/VACCINATOR** button. The "Physician/Vaccinator Maintenance [Add]" window appears.

Figure 8-3: Physician/Vaccinator Maintenance[Add]



2. It is recommended to type in as much information as possible. The fields and their descriptions are defined in the table below. At a minimum, fill in the "RED labeled" fields.

Note: Phone number is configurable by state and may not be a requirement for you.

Table 8-1: Physician/Vaccinator Maintenance Fields

FIELD	DESCRIPTION OF USE
FIRST NAME	Name of the Physician or Vaccinator you are adding. This is a required field.
MIDDLE NAME	Middle Name of the Physician or Vaccinator you are adding.
LAST NAME	Last Name of the Physician or Vaccinator you are adding. This is a required field.
SUFFIX	Suffix at the end of the Physician or Vaccinator's name. A few examples are: • ARNP - Advanced Registered Nurse Practitioner • ND – Naturopathic Doctor • MD – Medical Doctor • RN – Registered Nurse
SSN	Social Security Number of the Physician or Vaccinator.
BOMEX	An acronym used by the state of Arizona that means **B**oard **o**f **M**edical **Ex**aminers license number.
DO	Doctor of Osteopathy state assigned license number.
MEDICAID PIN	Medicaid Pin Number.
MEDICAID GROUP	Medicaid Group Number.
FACILITY	Facility name where the physician/vaccinator will be working. **Note**: If a Facility Display (Abbreviated) Name was entered for the facility, it will appear in the list as opposed to the full name of the facility.
PHONE NUMBER	Telephone number of the Physician or Vaccinator.
PHONE NUMBER EXTENSION	Extension number of the Physician or Vaccinator's phone number.

FIELD	DESCRIPTION OF USE
FAX NUMBER	Facsimile number of the Physician or Vaccinator.
EMAIL	Email address of the Physician or Vaccinator.
DISTRICT/REGION	This must be a whole number and be known by the user adding/editing the facility. **Note**: A state configurable option is available to have the District field automatically populate.
INACTIVE	If the checkbox contains a "check," the Physician/Vaccinator is INACTIVE; otherwise, the Physician/Vaccinator is ACTIVE. Since records cannot be deleted, placing the Physician/Vaccinator inactive, flags it so it cannot be used.
AUTOMATIC OWNERSHIP BLOCKED	If the checkbox contains a check, this physician CANNOT own a patient. The Physician will not display in the Physician drop-down list on the patient demographics screen.
TYPE	Click on the corresponding radio button for the type: Physician, Vaccinator, or both.

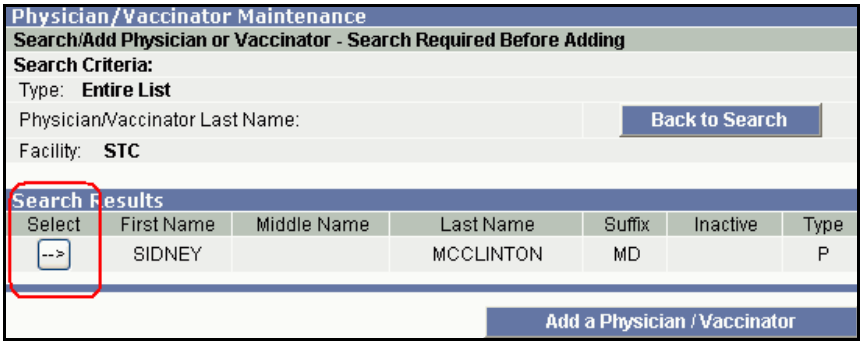
3. Click the **ADD THIS PHYSICIAN / VACCINATOR** button to officially add; or, click **CANCEL** to NOT add. The "Physician/Vaccinator Maintenance - Search" window reappears.

EDITING PHYSICIANS AND/OR VACCINATORS

To edit an existing Physician or Vaccinator, perform the following:

1. From the **PHYSICIANS/VACCINATORS** menu, point and click on the **SEARCH (/ADD)** option. The "Physician/Vaccinator Maintenance – Search" window appears.
2. Perform a **SEARCH** (Refer to the previous sections if necessary.). The "Physician/Vaccinator Maintenance Search Results" window appears.

Figure 8-4: Physician/Vaccinator Maintenance Select Button



3. Point and click on the **SELECT ARROW** to the left of the First Name. The "Physician/Vaccinator Maintenance [Detail]" window appears.

Figure 8-5: Physician/Vaccinator Maintenance [Detail]

4. Click the **UPDATE PHYSICIAN/VACCINATOR** button. The "Physician / Vaccinator Maintenance [Update]" window appears.

Figure 8-6: Physician/Vaccinator Maintenance [Update]

Physician/Vaccinator Maintenance [Update]	
First Name:	SIDNEY
Middle Name:	
Last Name:	MCCLINTON
Suffix:	MD
SSN:	
BOMEX:	1
DO:	
Medicaid PIN:	
Medicaid Group:	
Facility:	STC
Phone Number:	(602)241-1502
Phone Number Extension:	1112
Fax Number:	(602)241-1856
Email:	
District/Region:	
Inactive:	☐
Automatic Ownership Blocked:	☐
Type:	◉ Physician ○ Vaccinator ○ Both

Cancel | Reset Values | Update Now

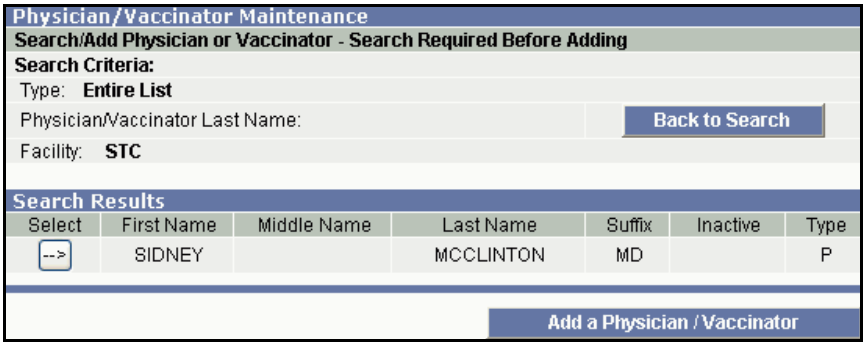
5. Type the new information into the appropriate field(s) and press one of the following buttons:
   - **CANCEL** – to NOT update and return to the "Physician / Vaccinator Search/Add" window.
   - **RESET VALUES** – to erase your newly entered data and redisplay the previous data.
   - **UPDATE NOW** – to save your new information and return to the "Physician / Vaccinator [Detail]" window.

PHYSICIANS/VACCINATORS SEARCH RESULTS

This option re-displays the search results from a previous **PHYSICIAN/VACCINATOR SEARCH**. If a Physician/Vaccinator Search has not been performed, this option will be grayed out; hence, will be unavailable to you until a search is performed.

1. From the **PHYSICIANS/VACCINATORS** menu, point and click **SEARCH (/ADD)**.
2. Perform a **Physician/Vaccinator Search**.

3. From the **PHYSICIANS/VACCINATORS** menu, point and click **SEARCH RESULTS**. The "Physicians/Vaccinator's Search Results" window appears.



PHYSICIANS/VACCINATORS DETAIL

This option re-displays the physician/vaccinator's **DETAIL** from a previously displayed Physician/Vaccinator Detail. If a Physician/Vaccinator Search has not been performed, the **DETAIL** option will be grayed out; hence, will be unavailable to you until a search is performed.

1. From the **PHYSICIANS/VACCINATORS** menu, point and click **SEARCH (/ADD)**.
2. Perform a **Physician/Vaccinator Search**.
3. From the **PHYSICIANS/VACCINATORS** menu, point and click **DETAIL**. The "Physician/Vaccinator Maintenance [Detail]" window appears.

Physician/Vaccinator Maintenance [Detail]	
First Name:	SIDNEY
Middle Name:	
Last Name:	MCCLINTON
Suffix:	MD
SSN:	
BOMEX:	1
DO:	
Medicaid PIN:	
Medicaid Group:	
Facility:	STC
Phone Number:	(602)241-1502 Ext: 1112
Fax Number:	(602)241-1856
Email Address:	
District/Region:	
Inactive:	
Automatic Ownership Blocked:	
Type:	Physician

Update Physician / Vaccinator

Signature:	

4. If you want to edit the Physician/Vaccinator information, click on the **UPDATE PHYSICIAN/VACCINATOR** button. Refer to the previous section for instructions, or click on a different menu option.

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9 LOT NUMBERS MENU

The purpose of the **LOT NUMBERS MENU** is for authorized users to Search, Add, and Edit names of Lot Numbers for consistent data entry, and to avoid data entry redundancy.

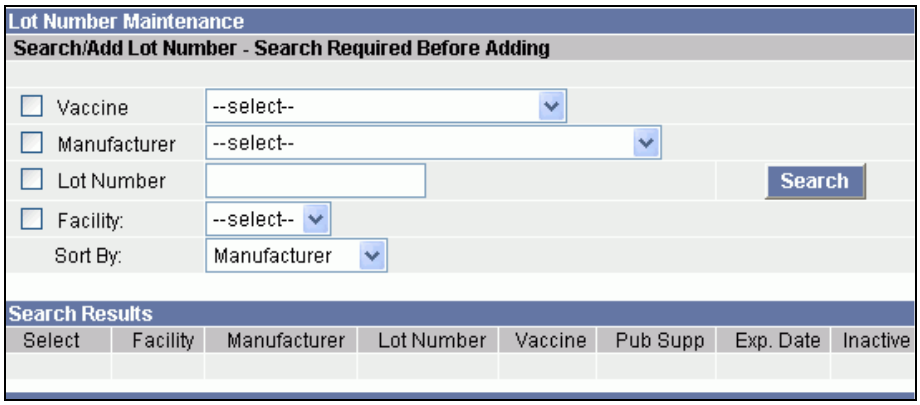
A "state configurable" option for a Facility Inventory Manager can be setup for a facility to allow facility-wide lot number defaults to be used. If a user does NOT have Lot Number defaults set up in their Personal Settings, the Inventory Manager's defaults will be used; however, if the user DOES have Lot Defaults setup in their Personal Settings, the Facility Inventory Manager's settings will not override them.

SEARCHING LOT NUMBERS

A search is always performed prior to adding or updating any items to the IWEB application.

1. From the **LOT NUMBERS** menu, point and click on the **SEARCH (/ADD)** option. The "Lot Number Maintenance—Search(/Add) window appears.

Figure 9-1: Lot Number Maintenance / Search



2. Determine the type of search you want to perform and either point and click the **DROP-DOWN ARROW(S)** or type the Lot Number. The search criteria can be none, one, or a combination of the following:

- Vaccine (drop-down list)
- Manufacturer (drop-down list)
- Lot Number (type the number)
- Facility (drop-down list)

Note: If you make a selection from the drop-down lists or type in the lot number field, the checkboxes will automatically get selected (checked).

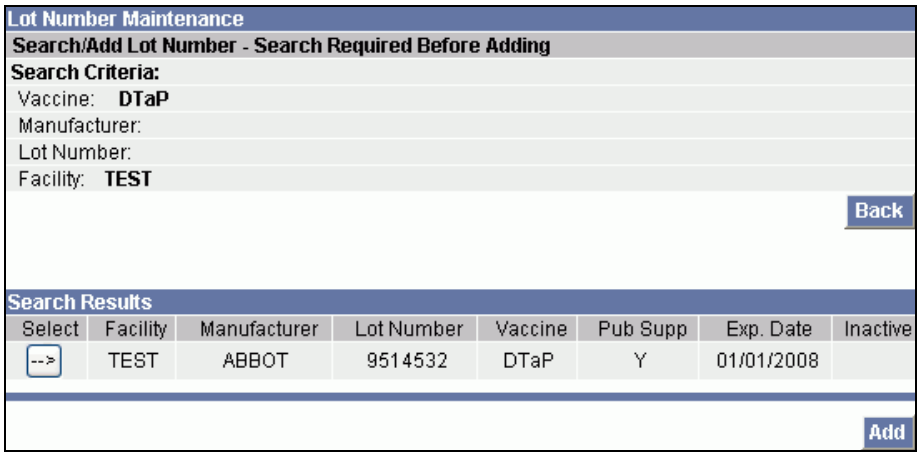
If a Facility Display (Abbreviated) Name was entered for the facility, it will appear in the list as opposed to the full name of the facility.

3. Click the drop-down arrow to view/select a valid choice to **SORT** the Lot Numbers.

4. Press the **SEARCH** button or the **ENTER** key. The "Lot Number Maintenance Search Results" window appears similar to the one shown (below the note).

Note: Vaccine (DTaP) and Facility (Test) was used to obtain this result.

Figure 9-2: Lot Number Maintenance with Search Result



5. Point and click one of the buttons:

- **SELECT ARROW** – to perform an **EDIT** on the chosen Lot. Continue to the section titled, "Editing Lot Numbers;" or,

- **BACK** – to perform another **SEARCH**; repeat the previous steps; or,
- **ADD** – to **ADD** a new Lot Number. Continue to the next section titled, "Adding Lot Numbers."

6. Continue to the appropriate section for detailed instructions.

ADDING LOT NUMBERS

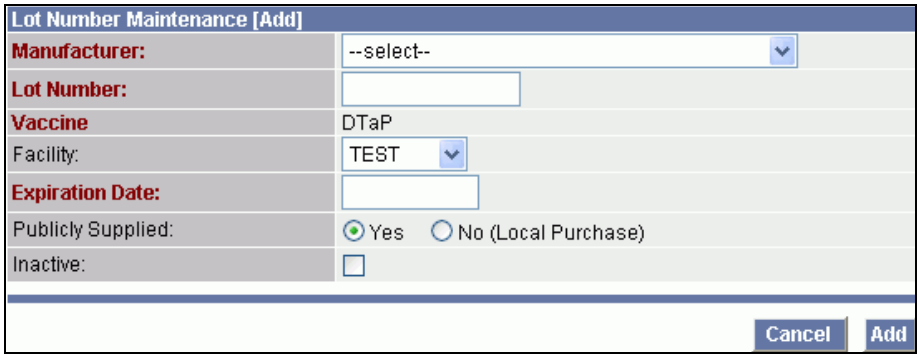
A search is always performed prior to adding any items to the IWEB application.

1. From the **LOT NUMBERS** menu, point and click on the **SEARCH (/ADD)** option. The "Lot Number Maintenance—Search(/Add)" window appears.

2. Perform a search by selecting/typing your search criteria (refer to the previous section for instructions) and press the **SEARCH** button or **ENTER** key. The "Lot Number Maintenance Search Results" window appears.

3. Click on the **ADD** button to add a new Lot Number. The "Lot Number Maintenance [Add]" window appears.

Figure 9-3: Lot Number Maintenance Add



4. At a minimum, fill in the "RED labeled" fields. It is recommended to fill in as much information as possible. Refer to the table for a list of fields and definitions.

Table 9-1: Lot Number Fields

FIELD	DESCRIPTION OF USE
MANUFACTURER	Manufacturer name of the vaccine. Click on the drop-down arrow for a list of valid choices. This is a required field.
LOT NUMBER	Lot number for the vaccine. Type the Lot Number. This is a required field.
VACCINE	Name of the Vaccine. Click on the drop-down menu arrow for a list of valid choices. This is a required field. If you attempt to create a new vaccine lot of an “unspecified” vaccine type (e.g., Hib – Unspecified), a warning message appears at the top of the window to alert the user that this action is not recommended. The message states, "Vaccine is unspecified, are you sure you want to add?" You will be required to click the checkbox verifying that you want to continue in order to add the unspecified vaccine.
FACILITY	Name of the facility associated with the vaccine. Click on the drop-down arrow for a list of valid choices. **Note**: If a Facility Display (Abbreviated) Name was entered for the facility, it will appear in the list as opposed to the full name of the facility.
EXPIRATION DATE	Date the vaccine is no longer valid for use. If a lot number does not include an expiration day within the expiration date, use the last day of the month to complete the date. The format must be mm/dd/yyyy.
PUBLICLY SUPPLIED	Indicates whether the vaccine was publicly supplied or not. Click the radio button for yes or no.
INACTIVE	Indicates whether the vaccine is inactive or not. If the checkbox contains a "check," the Lot Number is INACTIVE; otherwise, the Lot Number is ACTIVE. Since records cannot be deleted, placing the Lot Number inactive flags it so it cannot be used.

5. Point and click on one of the buttons or the state-configurable checkbox:
   - **CANCEL** – to NOT add and return to the "Lot Number Maintenance Search(/Add)" window.
   - **IGNORE UNSPECIFIED WARNING AND ADD LOT NUMBER** (checkbox) – to ignore the warning and continue to add. This is a state-configurable checkbox and may not appear.
   - **ADD** – to access the "Add to Total Doses" window. The "Add to Total Doses" window appears. Continue to the section titled, “Adding/Subtracting Doses.”

Note: Once you click the **ADD** button, you cannot **CANCEL** the addition. Instead, you will need to "Inactivate" it. Refer to the section titled, "Inactivating a Lot" for instructions.

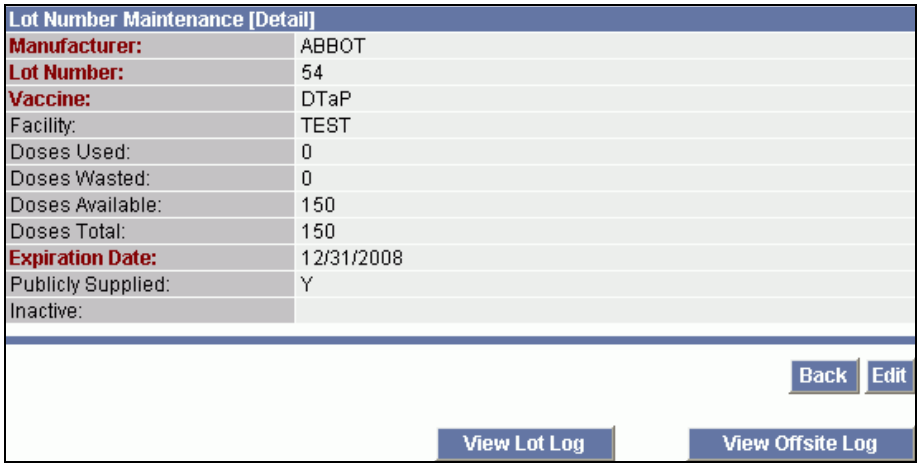
EDITING LOT NUMBERS

As long as no vaccinations have been administered from an existing lot, you can edit the lot number, manufacturer, and vaccine type to correct data entry mistakes.

Note: If a shot has been administered from a lot, even if deleted, a user will no longer be able to edit lot number.

1. From the **LOT NUMBERS** menu, point and click on the Search (/Add) option. The "Lot Number Maintenance—Search(/Add)" window appears.
2. Perform a search by selecting/typing your search criteria (refer to the previous section for instructions) and press the **SEARCH** button or the **ENTER** key. The "Lot Number Maintenance Search Results" window appears.
3. Click on the **SELECT ARROW** on the Lot you want to edit. The "Lot Number Maintenance [Detail]" window appears.

Figure 9-4: Lot Number Maintenance Detail



Lot Number Maintenance [Detail]	
Manufacturer:	ABBOT
Lot Number:	54
Vaccine:	DTaP
Facility:	TEST
Doses Used:	0
Doses Wasted:	0
Doses Available:	150
Doses Total:	150
Expiration Date:	12/31/2008
Publicly Supplied:	Y
Inactive:	

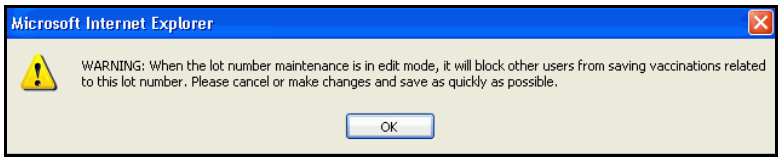
Back Edit

View Lot Log View Offsite Log

4. Click on one of the buttons:

- **BACK – to return to the previous window.**
- **VIEW LOT LOG** – to view the log for this lot. Refer to the section titled, "Viewing Lot Logs and Offsite Lot Logs" for instructions.
- **VIEW OFFSITE LOG** – to view Offsite Logs. Refer to the section titled, "Viewing Lot Logs and Offsite Lot Logs" for instructions
- **EDIT** – to edit Lot Number Details. A warning message displays.

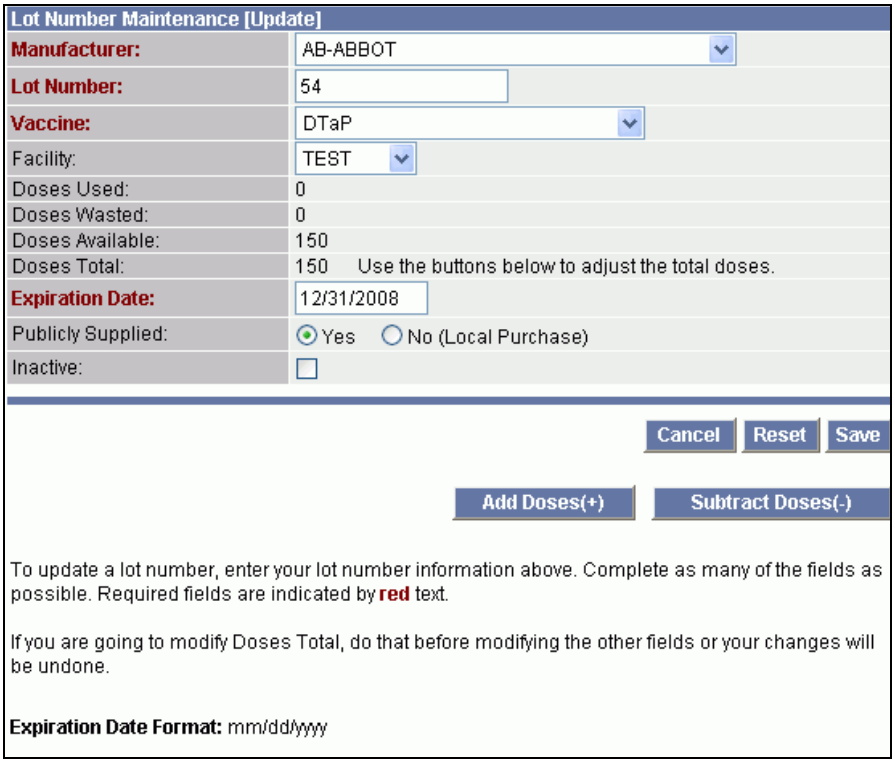
Figure 9-5: Lot Number Record Lock Warning Dialog



Note: This is a warning telling you that your edits will prevent others from using this lot while you are editing. You want to make your edits as quickly as possible.

5. Click **OK** to continue. The "Lot Number Maintenance [Update]" window appears.

Figure 9-6: Lot Number Maintenance Update



Note: Modify the Doses Totals before modifying other fields.

6. If you are adding/subtracting doses, continue to the section titled, “Adding/Subtracting Doses”; otherwise, continue to the next step.

7. If editing other fields excluding the addition/subtraction of doses, make your editing changes and then click one of the available buttons:

   - **SAVE** - to access the "Lot Number Maintenance [Detail]" window.
   - **RESET VALUES** - to erase newly typed data, redisplay the previous data, and remain on the "Lot Number Maintenance [Update]" window.
   - **CANCEL** - to NOT save and return to the "Lot Number Maintenance" window.
   - **ADD DOSES** - to access the "Add to Total Doses" window. Continue to the section titled, “Adding/Subtracting Doses.”

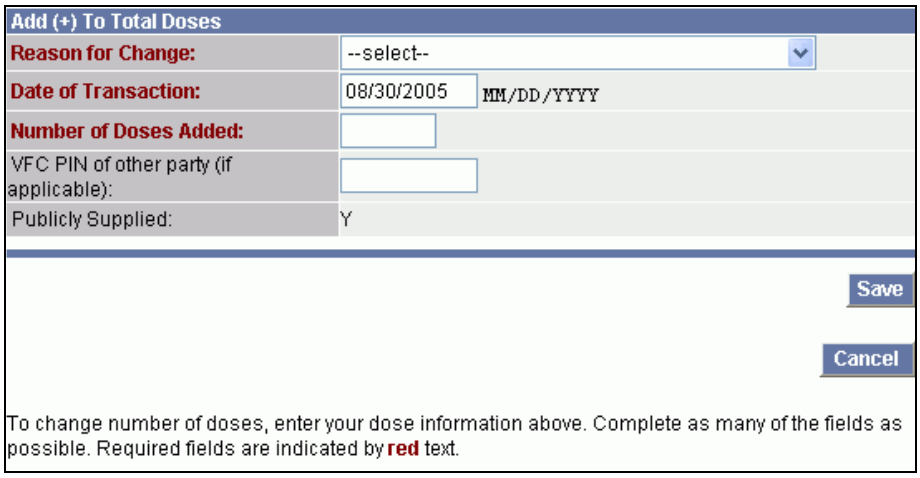
- **SUBTRACT DOSES** - to access the "Subtract to Total Doses" window. Continue to the section titled, “Adding/Subtracting Doses.”

ADDING/SUBTRACTING DOSES

Both of these windows contain the same fields.

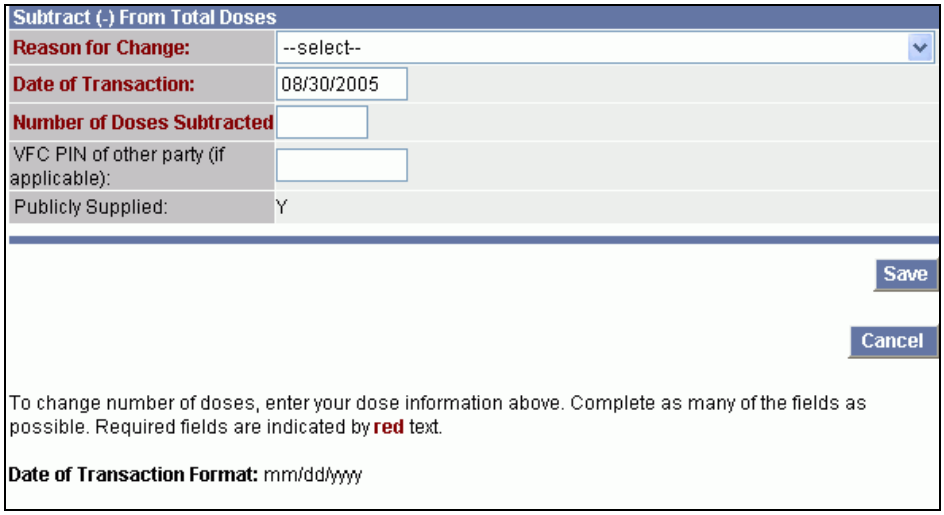
The “Add to Total Doses” window will appear when you have added a new lot number and when you have pressed the **ADD DOSES** button.

Figure 9-7: Add to Total Doses



The “Subtract from Total Doses” window appears when you have pressed the **SUBTRACT DOSES** button.

Figure 9-8: Subtract from Total Doses



To add or subtract doses, perform the following:

1. Click on the appropriate button, **ADD DOSES** or **SUBTRACT DOSES** button.
2. The fields and their descriptions are the same for both windows and are listed in the table below.

Table 9-2: Add/Subtract Doses Field Descriptions

FIELD	DESCRIPTION
REASON FOR CHANGE	Refer to the next table for a conclusive list of how the Lot Number inventory is impacted. **Note**: This is a mandatory field entry.
DATE OF TRANSACTION	Defaults to "today's" date and automatically fills in. **Note**: This is a mandatory field entry.
NUMBER OF DOSES (ADDED OR SUBTRACTED)	Total number of doses being added or subtracted. **Note**: This is a mandatory field entry.
VFC PIN OF OTHER PARTY (IF APPLICABLE)	If the vaccine being added was VFC supplied, this field should

FIELD	DESCRIPTION
	have an entry.
PUBLICLY SUPPLIED	If the vaccine is publicly supplied, this field will contain a Y for Yes, and an N for No.

3. Click the drop-down menu arrow to view/select a valid choice for **REASON FOR CHANGE**. The Reasons and their impact are listed in the table.

Note: When subtracting doses, three different adjustments can occur depending on the "Reason for the Change."

Table 9-3: Reasons for Lot Number Addition/Subtraction

REASON FOR CHANGE	EFFECTS
SUBTRACT FROM TOTAL DOSES	
RETURNED TO VFC PROGRAM	Doses **TOTAL** is decremented
SENT TO ANOTHER PROVIDER	Doses **TOTAL** is decremented
RETURNED DIRECTLY TO VENDOR, NOT VFC SUPPLIED	Doses **TOTAL** is decremented
OVER ESTIMATED TOTAL DOSES	Doses **TOTAL** is decremented
CORRECTION OF INVALID ENTRY	Doses **TOTAL** is decremented
INEFFECTUAL	Doses **TOTAL** is decremented
SPOILED, WASTED (DROPPED, SPILLED)	*Doses **WASTED** is incremented
EXPIRED	*Doses **WASTED** is incremented
LOST DURING SHIPMENT	*Doses **WASTED** is incremented
DAMAGED DURING SHIPMENT	*Doses **WASTED** is incremented

REASON FOR CHANGE	EFFECTS
LOST BY PROVIDER, UNACCOUNTED FOR IN PROVIDER INVENTORY	*Doses **WASTED** is incremented
TWO DOSES GIVEN TO BE EQUIVALENT OF NORMAL DOSAGE FOR THIS AGE PERSON	Doses **USED** is incremented
VACCINE USED AT REMOTE CLINIC	Doses **USED** is incremented
ADMINISTERED TO CLIENT WHO CHOSE NOT TO BE IN REGISTRY	Doses **USED** is incremented
ADD TO TOTAL DOSES	
RECEIVED FROM VFC PROGRAM	Doses **TOTAL** is incremented
RECEIVED FROM ANOTHER PROVIDER	Doses **TOTAL** is incremented
RECEIVED DIRECTLY FROM VENDOR, NOT VFC SUPPLIED	Doses **TOTAL** is incremented
UNDER ESTIMATED TOTAL DOSES	Doses **TOTAL** is incremented
CORRECTION OF INVALID ENTRY	Doses **TOTAL** is incremented
RECEIVED FROM CDC, NOT VFC SUPPLIED	Doses **TOTAL** is incremented
CORRECTION TO WASTED DOSES	Doses **TOTAL** is incremented
* Doses that are wasted are not counted as administered in the lot number totals, but are listed separately since they need to be counted as part of the original total.	

4. At a minimum, fill in the required fields (those displayed in red text).
5. Click on one of the available buttons:
   - **CANCEL** – to NOT save and access the "Lot Number Maintenance [Update] window.
   - **SAVE** – to save and display the "Lot Number Maintenance [Detail]" window.

VIEWING LOT LOGS AND OFFSITE LOGS

To view either the Lot Number Inventory Log or the Offsite Lot Number Log, access the Lot Number Maintenance [Detail] window.

1. From the **LOT NUMBERS** menu, point and click on the Search (/Add) option. The "Lot Number Maintenance—Search(/Add) window appears.
2. Perform a **Search** by selecting/typing your search criteria (refer to the previous section for instructions) and press the **SEARCH** button or the **ENTER** key. The "Lot Number Maintenance Search Results" window appears.
3. Click on the **SELECT ARROW** on the Lot Log you want to view. The "Lot Number Maintenance [Detail]" window appears.
4. Click on one of the available buttons:
   - **VIEW LOT LOG** – to view the Lot Number Inventory Log. Continue to the respective section for instructions.
   - **VIEW OFFSITE LOG** – to view the Lot Number Offsite Log. Continue to the respective section for instructions.

VIEWING LOT LOG (LOT NUMBER INVENTORY)

This log displays the Lot Number Inventory such as changes made to doses, reason description, date and timestamp of the change. It is used to **view** and verify changes that have been made to the LOT.

Note: Vaccinations for patients who "opt out" or are exempt from the registry, will be included in the central registry for inventory and CASA purposes.

1. From the **LOT NUMBER MAINTENANCE [DETAIL]** window, click on the **VIEW LOT LOG** button. The "Lot Number Inventory Log" window displays.

Figure 9-9: Lot Number Inventory Log

Lot Number Inventory Log

Manufacturer: ABBOT
Lot Number: 54
Facility: TEST

Date	Dose Change	Other Party's VFC Pin	Publicly Supplied	Description	Insert Stamp
08/30/2005	150		Y	Received from another provider	08/30/2005 11:41:53 AM

Back

Note: No changes can be made on this window.

2. This window contains intuitively named labels except for the Insert Stamp. The Insert Stamp indicates the date (mmddyyyy) and time the Lot inventory was adjusted.

3. Press the **BACK** button to return to the "Lot Number Maintenance [Detail]" window.

VIEWING OFFSITE LOGS

If you are transporting and/or using vaccine inventory offsite, you can Add Log Records regarding the addition (Check In) or subtraction (Check Out) of doses including comments. You can also **print** the log information.

Note: The application will only accept one value at a time in the Check In or Check Out fields.

1. From the **LOT NUMBER MAINTENANCE [DETAIL]** window, click on the **VIEW OFFSITE LOG** button. The "Offsite Lot Number Log" window displays.

Figure 9-10: Offsite Lot Number Log

Offsite Lot Number Log

Manufacturer: ABBOT
Lot Number: 54
Facility: TEST

Date	Dose Change	Username	Comments

Print Log Back Add Log Record

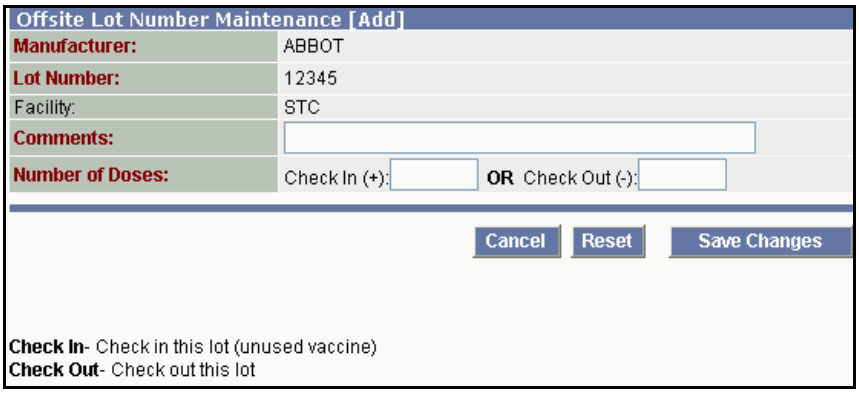
2. Click on one of the available buttons:
   - **ADD LOG RECORD** – to add comments to the Log. Continue to the section titled, "Adding a log record."
   - **PRINT LOG** – to send the displayed log to a printer.
   - **BACK** – to return to the "Lot Number Maintenance [Detail]" window. The "Offsite Lot Number Maintenance [Add]" window appears.

ADDING A LOG RECORD

To add a **LOG RECORD** to the Offsite Lot Number Log, perform the following:

1. From the "Offsite Lot Number Log" window, click the **ADD LOG RECORD** button. The "Offsite Lot Number Maintenance [Add]" window appears.

Figure 9-11: Add Log Record to Offsite Lot Log



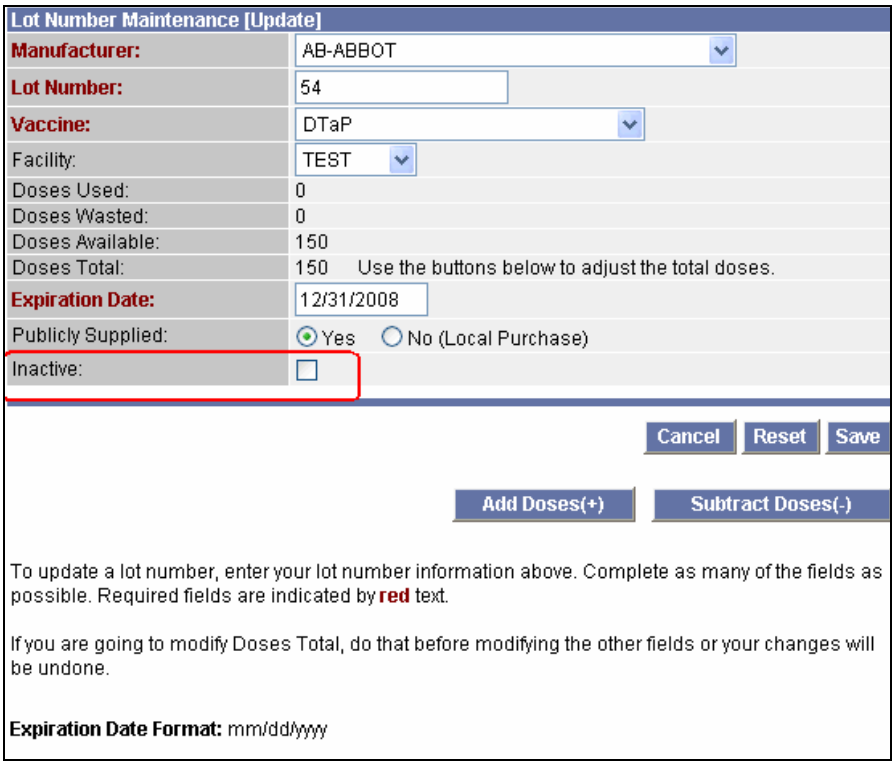
2. Fill in the "RED labeled" mandatory fields:
   - Comments
   - Number of Doses you're checking in/out
3. Click on one of the available buttons:
   - **SAVE CHANGES** – to save and return to the "Offsite Lot Number Log" window.
   - **RESET** – to erase newly typed entries and remain on the window.
   - **CANCEL** – to NOT save and return to the "Offsite Lot Number Log" window.

INACTIVATING A LOT

Since **LOT NUMBERS** cannot be deleted, you will **INACTIVATE** them instead.

1. From the **LOT NUMBERS** menu, point and click on the Search(/Add) option. The "Lot Number Maintenance—Search(/Add) window appears.
2. Perform a search by selecting/typing your search criteria (refer to the previous section for instructions) and press the **SEARCH** button or the **ENTER** key. The "Lot Number Maintenance Search Results" window appears.
3. Click on the **SELECT ARROW** for the Lot you want to Inactivate. The "Lot Number Maintenance [Detail]" window appears.
4. Click on the **EDIT LOT NUMBER** button. A warning message displays.
5. Click **OK** button on the warning dialog to continue. The "Lot Number Maintenance [Update]" window appears.

Figure 9-12: Lot Number Maintenance Update with Inactive Checkbox



6. Click on the **INACTIVE** checkbox.
7. Click the **SAVE** button.
8. To **EXIT** out of this window, choose another menu option.

LOT NUMBER SEARCH RESULTS

This option re-displays the search results from a previous **LOT NUMBER SEARCH**. If a Lot Number Search has not been performed, this option will be grayed out; hence, will be unavailable to you until a search is performed.

1. From the **LOT NUMBERS** menu, point and click **SEARCH(/ADD**).
2. Perform a **Lot Number Search**.
3. From the **LOT NUMBERS** menu, point and click **SEARCH RESULTS**. The "Lot Number Search Results" window appears. Refer to Figure 4:2 for an illustration of the window.

LOT NUMBERS DETAIL

This option re-displays the Lot Number Maintenance DETAIL from a previously displayed Lot Number Maintenance Detail. If a Lot Number Search has not been performed, the DETAIL option will be grayed out; hence, will be unavailable to you until a search is performed.

1. From the **LOT NUMBERS** menu, point and click **SEARCH (/ADD).**
2. Perform a **Lot Number Search**.
3. From the **LOT NUMBERS** menu, point and click **DETAIL**. The "Lot Number Maintenance [Detail]" window appears.

10 SETTINGS MENU

The **SETTINGS** menu provides a method to set up defaults that will expedite the data entry process by automatically populating drop-down menus and/or fields.

There categories of settings are:

- Personal
- Forecast

PERSONAL SETTINGS

Personal settings are used when adding a new patient by allowing some of the patient fields to automatically fill; thus, saving data entry time. There are six categories of **PERSONAL** default settings:

- Patient
- Vaccination
- Anatomical Injection Site
- Lot
- VIS Publication Date
- User Preferences

The Personal Settings will automatically populate the fields on the Patient Demographic and Vaccination windows.

There are different types of hyperlinks to the right of the categories (point and click the red/purple hyperlink to activate the option):

- "Click to update" or "click to add"
- "Update/delete" or "update"

ADDING/UPDATING PATIENT DEFAULTS

The Patient Defaults settings will automatically populate the fields on the Patient Demographics Edit window. To add or update Patient Defaults, perform the following:

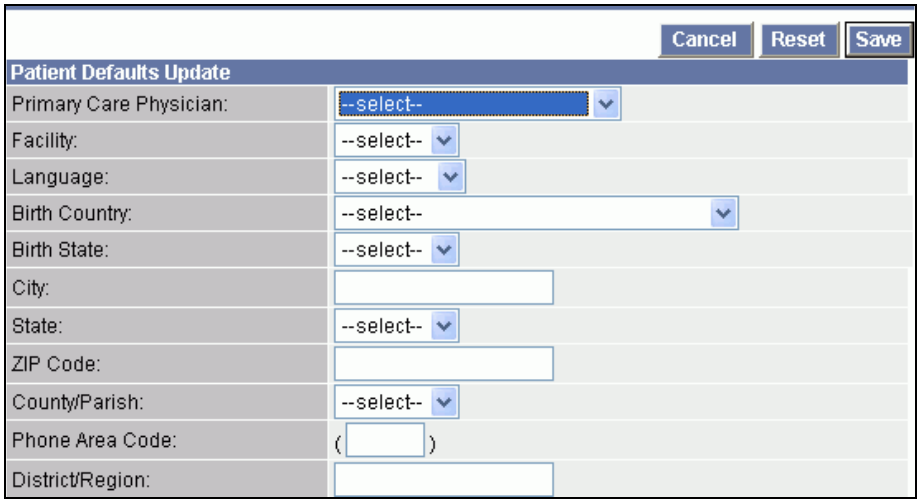
1. From the **SETTINGS** menu, point and click on the **PERSONAL** option. The "Personal Settings" window appears.

Figure 10-1: Personal Settings

Personal Settings				
Patient Defaults click to update				
Primary Care Physician:		City:		
Facility:		State:		
Language:		County/Parish:		
Phone Area Code:		ZIP Code:		
Birth State:		District/Region:		
Birth Country:				
Vaccination Defaults click to update				
Vaccinator:		Facility:		
District/Region:				
Anatomical Injection Site Defaults click to add				
Vaccine Name:	Anatomical Site:	Min age	Max age	
Lot Defaults click to add				
Vaccine Name:	Manufacturer / Lot Number / Facility / Pub Supp:			
VIS Publication Date Defaults click to add				
Vaccine Name:	Pub Date1:	Pub Date2:	Pub Date3:	Pub Date4:
User Preferences click to update				
Feature:			Status:	
Default Patient Search Version			Simple	
Automatic City / State / Zip / County Population			Enabled	
Use Arrow Navigation on Vaccination View/Add screen			Enabled	
Vaccine List Sort Order			Expiration Date	

2. In the Patient Defaults section, point and click on the "**click to update**" hyperlink. The "Patient Defaults Update" window appears.

Figure 10-2: Personal Settings / Patient Defaults



3. Point and click on the **drop-down arrows** to display a list of valid choices or type the data into the fields:

- Primary Care Physician
- Facility
- Language
- Birth Country
  - **a)** Mexico's postcode is 5 digits to the left of locality name (ex: 02860 MEXICO, D.F.)
  - **b)** Canada's provinces are 2 variable characters (ex: Montreal QC H3Z 2Y7)
- Birth State
- City
- State
- ZIP Code
- County/Parish
- Phone Area Code
- District/Region (must be a positive number)

Note: If a **Facility Display** (Abbreviated) **Name** was entered for the facility, it will appear in the list versus the full name of the facility.

4. Click one of the buttons:

- **CANCEL** – to NOT save and return to the "Personal Settings" window.
- **RESET** – to erase any newly entered text, redisplay the previous data, and remain on this window.
- **SAVE** – to save and return to the "Personal Settings" window.

ADDING/UPDATING VACCINATION DEFAULTS

To add or update Vaccination Defaults, perform the following:

1. In the **Vaccination Defaults** section, point and click on the "**click to update**" hyperlink. The "Vaccination Defaults Update" window appears.

Figure 10-3: Vaccination Defaults Update

2. Click on the drop-down arrows to display a list of valid choices for the following fields:

- Vaccinator
- Facility

Note: If a Facility Display (Abbreviated) Name was entered for the facility, it will appear in the list as opposed to the full name of the facility.

3. Click on one of the buttons:

- **CANCEL** – to NOT save and return to the "Personal Settings" window.
- **RESET** – to erase any newly entered text, redisplay previous date, and remain on this window.
- **SAVE** – to save and return to the "Personal Settings" window.

ADDING/UPDATING ANATOMICAL INJECTION DEFAULTS

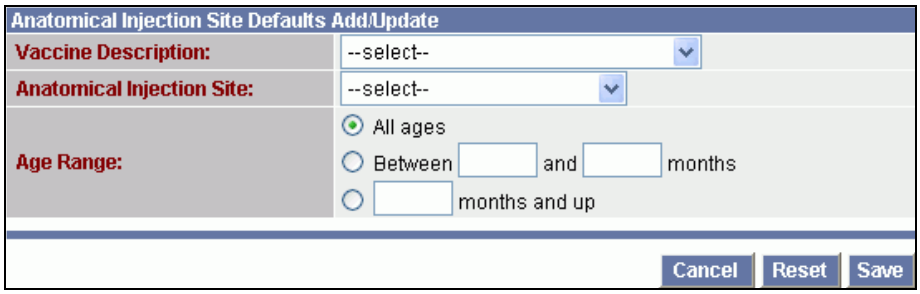
The anatomical injection site for DTaP, MMR, IPV and Varicella can change depending on the age of the child. The default anatomical injection site defaults allow multiple anatomical site defaults depending on the patient's age. When this setting is entered, the injection site will display on the "Vaccination Add Details" based on the patient's age setup here.

To add or update Anatomical Injection Site Defaults, perform the following:

1. In the **Anatomical Injection Site Defaults** section, point and click on one of the hyperlinks:
   - "**click to add**" hyperlink when adding.
   - "**update**" when editing an existing setting.

   The "Anatomical Injection Site Details Add/Update" window appears.

Figure 10-4: Anatomical Injection Site Defaults Add/Update



2. In the **VACCINE DESCRIPTION** and **ANATOMICAL INJECTION SITE** fields, click on the **drop-down arrows** to display a list of valid choices.

   Note: For the vaccines DTaP, MMR, IPV, and Varicella, a multiple anatomical injection site has been added since the anatomical injection site changes depending on the age of the child. If a child is 15 months, the Anatomical Injection Site would be given in the thigh. If the child is 5 years old, it will be given in the arm.

3. In the **AGE RANGE** field, click on one of the radio buttons:

- All Ages – to set the default for no minimum and maximum months; in other words, none.
- Between (Minimum age) and (Maximum age) Months – to set the default for a specific minimum and maximum age.
  - **a)** If the minimum was 0 months and the maximum was 2 months, this covers the range until the child turns 2 months.
  - **b)** If the Maximum field isn't filled in, it will react as though you selected Minimum Months and Up.
- (Minimum) Months and Up – to set a default for a specific number of months and older.

Note: An error will appear if adding an age range that overlaps another age range already specified for the default setting of the same vaccine.

4. Click on one of the buttons:

- **CANCEL** – to NOT save and return to the "Personal Settings" window.
- **RESET** – to erase any newly entered text, redisplay previous data, and remain on this window.
- **SAVE** – to save and return to the "Personal Settings" window.

Note: One vaccine name can be associated with one anatomical injection site at any given time.

DELETING ANATOMICAL SITE DEFAULTS

Click on the **DELETE** hyperlink. The Vaccine and Anatomical Injection Site immediately deletes. The window does not open to another window.

ADDING/UPDATING LOT DEFAULTS

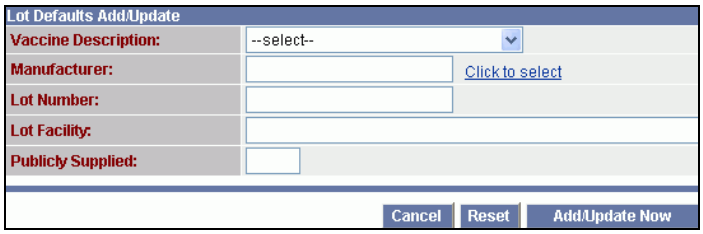
A "state configurable" option for a **Facility Inventory Manager** can be setup for a facility to allow facility-wide lot number defaults to be

used. If a user does NOT have Lot Number defaults set up in their Personal Settings, the Inventory Manager's defaults will be used; however, if the user DOES have Lot Defaults setup in their Personal Settings, the Facility Inventory Manager's settings will not override them.

1. In the **Lot Defaults Add/Update** section, point and click one of the hyperlinks:
   - "**click to add**" hyperlink if you are adding a new Lot Default.
   - "**update**" if you are editing an existing Lot Default.

   The "Lot Defaults Add/Update" window appears.

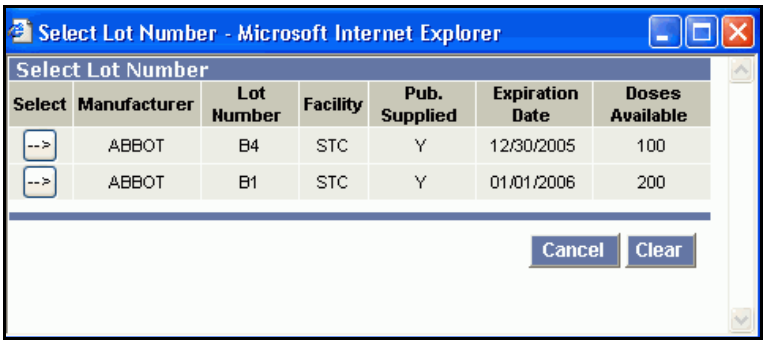
Figure 10-5: Lot Defaults Add/Update



2. Click on the **drop-down arrow** to display a list of valid choices and make a selection for the **Vaccine Description**.
3. Click on the "**Click to Select**" hyperlink to display the "Select Lot Number" window with a list of valid choices.

Note: This list changes depending on the Vaccine chosen. In the window below, DTaP was the chosen Vaccine.

Figure 10-6: Select Lot Number



4. While on the "Select Lot Number" window, click on one of the buttons:
   - **SELECT ARROW** beside the Manufacturer you desire. You will return to the "Lot Defaults Add/Update" window with your selection imbedded into the corresponding field(s).
   - **CANCEL** to return to the "Lot Defaults Add/Update" window with your data remaining in the fields.
   - **CLEAR** to return to the "Lot Defaults Add/Update" window with the data fields erased.
5. While on the "Lot Defaults Add/Update" window, click on one of the buttons:
   - **CANCEL** to NOT save and return to the "Personal Settings" window.
   - **RESET** to erase any newly entered text, redisplay the previous data, and remain on this window.
   - **ADD/UPDATE NOW** to save and return to the "Personal Settings" window.

DELETING LOT DEFAULTS

Locate the Lot whose defaults you want to delete, and click on the **DELETE** hyperlink. The Vaccine Name, Manufacturer, Lot Name, and Facility immediately delete. The window does not open to another window.

ADDING/UPDATING VIS PUBLICATION DATE DEFAULTS

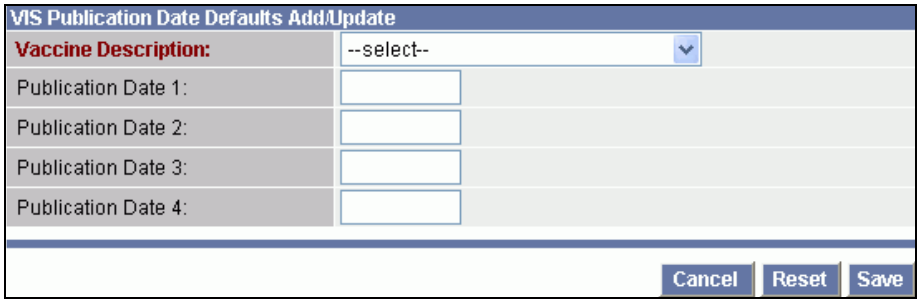
The Vaccine Information Sheet (VIS) is a publication containing information regarding the immunization. Periodically, they are updated and reprinted, and are tracked within the application.

Note: The System Administrator can set up an IRMS VIS Publication Date Default that will automatically populate the VIS Publication Date fields within the application if this setting is not done by the user; however, if the user has set up this default it will override the System Administrator's setting(s).

1. In the VIS Publication Date Defaults section, point and click one of the hyperlinks:
   - "click to add" hyperlink when adding a new publication date.
   - "update" hyperlink when updating an existing setting.

   The "VIS Publication Date Add/Update" window appears.

Figure 10-7: VIS Publication Date Defaults Add/Update



2. Click on the drop-down arrow to display a list of valid choices for the **Vaccine Description**.
3. Type at least one Publication Date in the **Publication Date 1** field for each antigen of the vaccine. There are four fields for additional unique dates.
   - Dates two through four are primarily for composite shots.
4. Click on one of the buttons:
   - **CANCEL** – to NOT save and return to the "Personal Settings" window.
   - **RESET** – to erase any newly entered text, redisplay previous data, and remain on this window.
   - **SAVE** – to save and return to the "Personal Settings" window.

UPDATING VIS PUBLICATION DATES

To update VIS Publication Dates, perform the following:

1. From the "Personal Settings" window, point and click on the **UPDATE** hyperlink next to the **VIS PUBLICATION DATE** you want to update. The "VIS Publication Date Defaults

Add/Update" window appears. Refer to Figure 5:7 for an illustration of the window.

2. Make the necessary changes and click on one of the available buttons:
   - **CANCEL** – to NOT save and return to the "Personal Settings" window.
   - **RESET** – to erase any newly entered text, redisplay the previous data, and remain on this window.
   - **SAVE** – to save and return to the "Personal Settings" window.

DELETING VIS PUBLICATION DATES

Locate the VIS Publication Date whose defaults you want to delete, and click on the **DELETE** hyperlink. The VIS Publication Date is immediately deleted. The window does not open to another window.

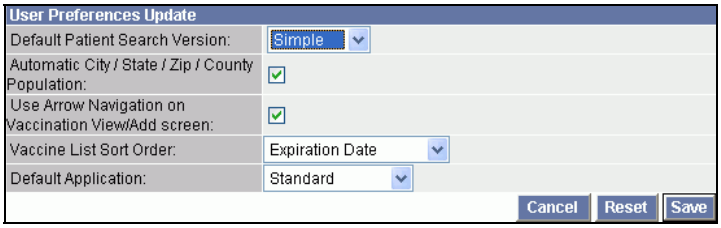
USER PREFERENCES

This section is used to setup user preferences as default settings for the following:

- Type of "default" search to perform (simple or advanced)
- Enable or disable the automatic entry of City, State, Zip Code, and County fields allowing automatic population in all data entry window drop-down menus and/or fields.
- Enable/disable use of the Arrow Navigation keys on Vaccination View/Add" windows.
- Set the order preference for the Vaccine List.
- Default application.

1. From the "Personal Settings" window, point and click on the **CLICK TO UPDATE** hyperlink next to the **USER PREFERENCES** label. The "User Preferences Update" window appears.

Figure 10-8: User Preferences Update



2. Continue to the section below corresponding to the option you want to change/set.

SETTING/UPDATING THE DEFAULT PATIENT SEARCH

There are two types of searches—Simple and Advanced. By using this feature, you can set the type of search that will be used as the default lookup for the Patient Search; however, this setting can be overridden directly on the "Patient Search" window.

If this setting isn't set here, the application assumes the Simple type.

To set the type of patient search default, perform the following:

1. Click the drop-down arrow and choose the desired option for the Default Search:

- **Simple** – Uses any combination of: First Name or Initial, Last Name or Initial, Birth Date, WIC ID, SIIS Patient ID / Bar Code, Chart Number.
- **Advanced** – Uses any combination of: First Name, Last Name, Birth Date, or First Name, Last Name, Birth Date, Guardian First Name, or Mother's Maiden Name, Street, City, State, Zip, Phone Number.

2. Click one of the available buttons:

- **CANCEL** – to not save any newly changed entries.
- **RESET**– to erase any newly typed entries from the fields.
- **SAVE** – to save newly typed entries.

ENABLING/DISABLING AUTOMATIC CITY, STATE, ZIP, COUNTY POPULATION

By enabling this setting, when a user accesses any window containing the City, State, Zip Code, or County fields, they will automatically populate.

To enable/disable the automatic population for **City**, **State**, **Zip code,** and **County** drop-down menus and/or fields, perform the following:

1. Point and click in the checkbox to Enable the automatic population of city, state, Zip code and county (located to the right of the field label).

Note: To disable the automatic population for City, State, and Zip Code, uncheck the checkbox.

2. Click one of the available buttons:

- **CANCEL** – to NOT save any newly changed entries.
- **RESET**– to erase any newly typed entries from the fields.
- **SAVE** – to save newly typed entries and return to the "Personal Settings" window with your new changes displayed.

ENABLING/DISABLING USE OF ARROW NAVIGATION KEYS ON VACCINATION VIEW/ADD

This setting is state-configurable and enables a user to use the keyboard's arrow keys to navigate around on the "Vaccination View/Add" windows.

To enable/disable the use of Arrow Navigation keys (using the keyboard), perform the following:

1. Point and click in the checkbox to Enable the use of the Arrow Navigation Keys (located on your keyboard).

Note: To disable the use of Arrow Navigation keys, uncheck the checkbox.

2. Click one of the available buttons:
   - **CANCEL** – to NOT save any newly changed entries.
   - **RESET**– to erase any newly typed selections from the fields.
   - **SAVE** – to save newly typed entries and return to the "Personal Settings" window with your new changes displayed.

SETTING THE VACCINE SORT ORDER

This setting is used to setup the preferred order that vaccines will appear on the Lot Number List windows.

To select the **Vaccine Sort Order**, perform the following:

1. Click the drop-down arrow to view/select a valid choice. Valid choices are:
   - Facility Group, Facility
   - Facility
   - Expiration Date (default order; soonest date at the top)
   - Manufacturer (second order)
   - Lot Number (third order)
2. Click one of the available buttons:
   - **CANCEL** – to NOT save any newly changed entries.
   - **RESET**– to erase any newly typed selections from the fields.
   - **SAVE** – to save newly typed entries and return to the "Personal Settings" window with your new changes displayed.

SETTING THE DEFAULT APPLICATION

This option is used to setup a user's default application. To set the default application perform the following:

1. Click the drop-down menu arrow to view/select the default application. Examples are:

- First Responder
- Provider Recruitment
- Standard (IWEB)

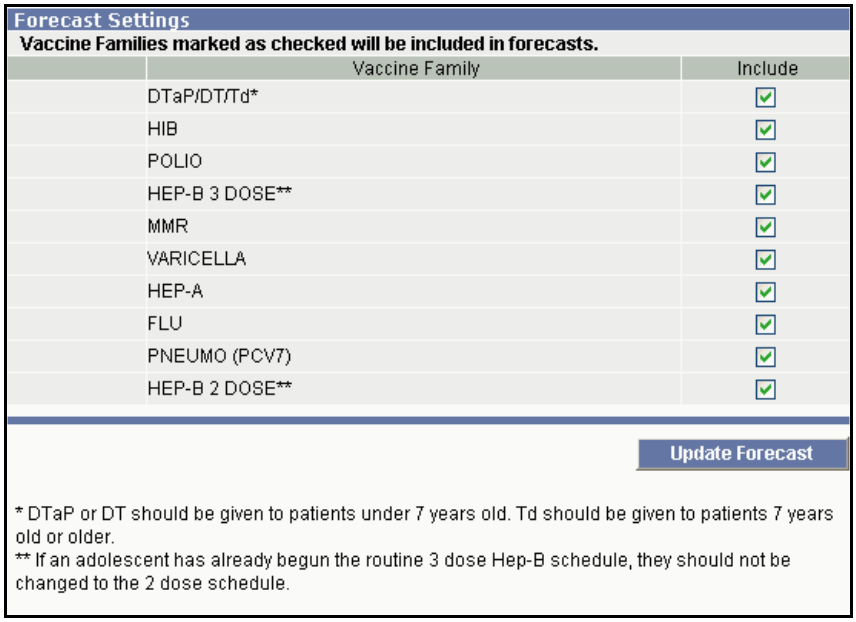
2. Click one of the available buttons:
   - **CANCEL** – to NOT save any newly changed entries.
   - **RESET**– to erase any newly typed selections from the fields.
   - **SAVE** – to save newly typed entries and return to the "Personal Settings" window with your new changes displayed.

FORECAST SETTINGS

The Forecast Settings option is used to setup which vaccines should be forecasted for all patients and will appear throughout the application (Vaccination forecasts, Reports, etc.).

1. From the **SETTINGS** menu, point and click on the **FORECAST** option. The "Forecast Settings" window appears with each Vaccine Family listed.

Figure 10-9: Forecast Settings



Forecast Settings

Vaccine Families marked as checked will be included in forecasts.

	Vaccine Family	Include
	DTaP/DT/Td*	☑
	HIB	☑
	POLIO	☑
	HEP-B 3 DOSE**	☑
	MMR	☑
	VARICELLA	☑
	HEP-A	☑
	FLU	☑
	PNEUMO (PCV7)	☑
	HEP-B 2 DOSE**	☑

Update Forecast

* DTaP or DT should be given to patients under 7 years old. Td should be given to patients 7 years old or older.
** If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.

2. Point and click the checkbox under the Include column if you want to include the vaccine in all forecasting windows and reports.
3. Click the **UPDATE FORECAST** button, if you made changes. The window does not open to another window.
4. If there are no changes, click on a different menu option to exit.

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11 PATIENT MENU

The purpose of the Patient Menu is to **SEARCH** and **ADD PATIENTS**, as well as view their **DEMOGRAPHICS**. The Demographics option will become available (displays in bold versus gray) after a Search has been performed.

For viewers, the menu will display **Search**, and for clients, the menu will display **Search/Add**.

Regardless of whether you are editing, viewing, or adding a new patient, a **SEARCH** is always performed first.

PATIENT RECORD ELEMENTS / PUBLIC & PRIVATE DATA

Public information is registry-wide information and can be viewed by every user access type, **excluding Vendor View**.

Private information is confidential information and can be viewed only by the "owner." This excludes **Registry View** and **Vendor View**.

Note: You are only given access to view private information when the information originates within your IRMS.

Registry Clients, IRMS Clients and **Facility Clients** are the users that are able to add/modify patients.

PATIENT RECORD ELEMENTS

A patient record consists of two major elements each containing public and private data fields:

- Demographics (public and private)
- Vaccinations (public and private)

The field names shown in the next two tables indicate whether the field is public versus private.

DEMOGRAPHICS

Demographics consist of patient, address, family, and miscellaneous data. The table details the Patient Demographic fields and the type of field (public or private).

Table 11-1: Patient Demographics Elements

Patient Demographics			
Patient			
First Name or Alias:	Public	Race:	Private
Middle Name:	Public	Ethnicity:	Private
Last Name or Alias:	Public	Language:	Private
Suffix:	Public	Medicaid:	Private
Birth Date:	Public	Birth File:	Private
SSN:	Private	VFC Status:	Private
Gender:	Public	Inactive:	Public
Age:	Public		
Multiple Birth	Public		
Address			
Street:	Private	Physical Address:	Private
City:	Private	State:	Private
Country:	Private	County/Parish:	Private
ZIP Code:	Private	District/Region:	Private
Phone Number and Extension	Private	Valid Address	Private
Email:	Private	Block Health Promotion Reason	Private
School:	Private		

Patient Demographics			
Family			
Grdn 1 First Nm:	Public	Grdn 1 SSN:	Private
Grdn 1 Middle Nm:	Public	Grdn 2 First Nm:	Public
Grdn 1 Last Nm:	Public	Grdn 2 Last Nm:	Public
Mother Maiden Nm:	Private	Grdn Work Phone:	Private
Other Info			
Physician:	Public	Health Plan Name:	Public
Facility:	Public	HP Patient ID:	Private
Chart Number:	Private	HP Enroll Date:	Private
Next Appt. Date:	Private	Birth State:	Private
Block Recall:	Private	Birth Country:	Private
Recall Count:	Public	Allergies/Comments:	Private
Program/Mem.IDs:	Public	Number in Family:	Public
Monthly Income:	Private		
Record Info			
SIIS Patient ID:	Private	IRMS Owner	Public
Entry Date:	Public	Last Update:	Public

VACCINATIONS

The Vaccinations element is self-explanatory. The table contains the fields associated with a patient's vaccinations.

Table 11-2: Patient Vaccination Elements

VACCINATIONS			
Note: Regardless of patient record ownership, the user will always see every individual vaccination.			
Vaccination Detail			
Vaccine:	Public		
Date Administered:	Public		
Historical:	Public		
Manufacturer:	Private		
Lot Number:	Public		
Lot Facility:	Private		
Vaccinator:	Public		
Publicly Supplied:	(Y) Public (N) Private		
Facility:	Public		
Anatomical Site:	Public		
VFC Status:	Private		
Adverse Reaction:	Private		
District/Region:	Private		
Dates of VIS Publications:	Public		
Date VIS Form Given:	Public		

OWNERSHIP OF PATIENT RECORDS

Ownership is a privilege that is initially set up by the Administrator specifically for an IRMS.

Records can be owned by:

- An IRMS
- A Primary Care Facility
- A Primary Care Physician

When a Facility or Physician is the owner of a record, it is a combination of IRMS/Facility and IRMS/Physician.

Ownership is identified by the values in the Patient Demographic record; specifically:

- An IRMS
- A Primary Care Facility
- A Primary Care Physician

These fields are populated in two ways:

If they are manually edited on the patient demographics window, or an administered vaccination is added by an entity that is allowed to own records (or does not have ownership blocked).

OWNERSHIP RESTRICTIONS

Depending on how your state is configured, it may be appropriate to block ownership for entities such as schools, emergency rooms, and specialized clinics that won't be handling any patient management such as reminder recall.

Vaccination date is used to determine ownership versus registry entry date.

Note: If the “Do not take ownership of this record” checkbox is checked on the “Patient Demographics Edit” or on the “Vaccination View/Add” window, then the ownership of the patient record remains with the previous owning IRMS and is not changed to the IRMS making the edit or adding the shot(s).

PATIENT SEARCH & ADD INFORMATION

There are two types of searches—**Simple** or **Advanced. Simple searches** are most frequently used by application View(ers).

The system administrator sets up a default search type when your User-ID is created; however, you can change this default using the **SETTINGS** option, or you can override the setting directly on the "Patient Search" window to use both types of searches.

Both "search types" will try to locate an **EXACT** match unless you use one of the wildcard characters with your entry. The wildcard characters (% and _) and their differences are:

- **Percent (%)** – Useful when you are unsure how a **name** is spelled. The percent sign is used to indicate multiple letters.

  For example: We are unsure if the name is Janet or Janice. We could enter Jan% for the first name and click on the SEARCH button to locate all names that begin with JAN.

- **Underscore (_)** – Useful when you are unsure how a **name** is spelled, but know it is a single letter; e.g., we are unsure if the name is Diane or Diana. We could enter Dian_ for the first name and click on the **SEARCH** button to locate all names that begin with DIAN.

Note: When using initials in the **FIRST NAME** and **LAST NAME** fields, do not use the wildcard characters.

The results of the search will position in the bottom half of the window along with the search criteria. The total results that can be returned are 250 records. If there are more than 250 records, a message will appear indicating to limit your search by adding additional search criteria.

A patient can be added from both the Simple and Advanced windows; however, the windows behave differently and will be described. Continue to the section that corresponds to the type of Search being used (Simple or Advanced).

SIMPLE PATIENT SEARCH/ADD

Previous search results will appear on the window upon opening, if a search was done.

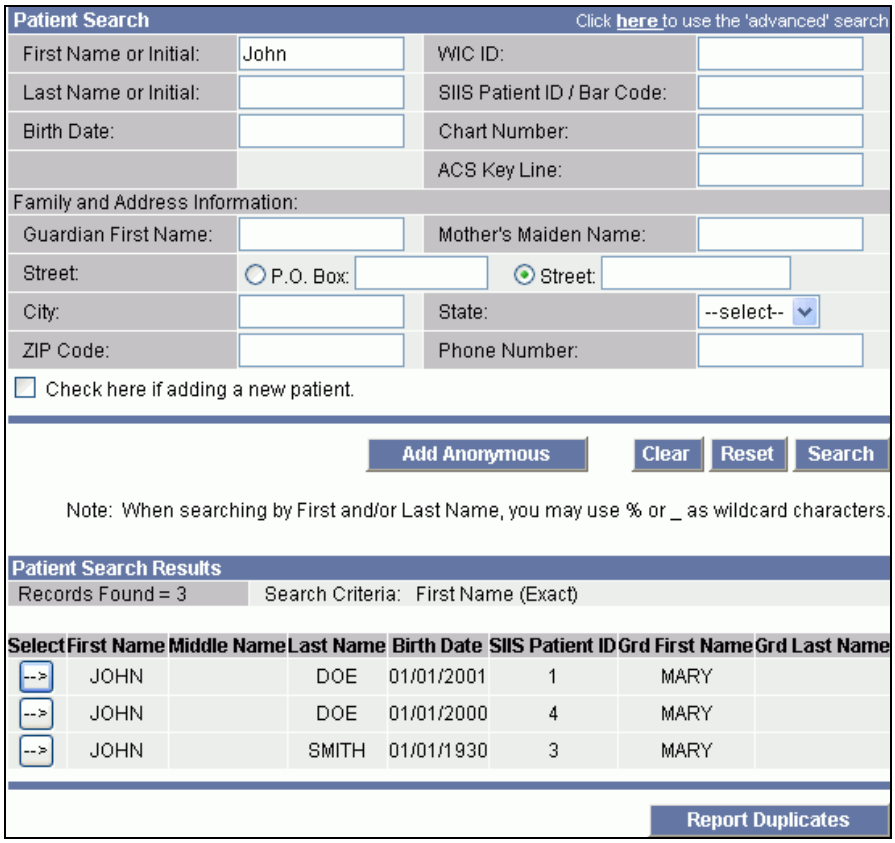
The more criteria that you can enter, the fewer returned results.

Note: If necessary, click on the "**Click here to use the 'advanced' search**" hyperlink. The (advanced) "Patient Search" window appears. Continue to the section titled, "Advanced Patient Search/Add."

To perform a **SIMPLE SEARCH**, follow these steps:

1. From the **PATIENT** menu, point and click on the **SEARCH/ADD** option. The Simple "Patient Search" window appears.

Figure 11-1: Simple Patient Search



Note: To switch from the **Simple** search to **Advanced**, click on the "Click here to use the "advanced" search" hyperlink. Refer to the Advanced Search section for instructions.

2. The fields and buttons are described in the table below.

Table 11-3: Simple and Advanced Patient Search Fields

SIMPLE FIELD	ADVANCED FIELD	DESCRIPTION
FIRST NAME OR INITIAL	**FIRST NAME**	Name, alias, or initial of the patient's first name. The following can also be used as a First Name: • NEWBORN • BABY • BABY BOY • BABY GIRL **Note**: When using an **initial**, do not use the wildcard characters; however, you can use the wildcard characters when using **names**. **Alias** information is state configurable, so it may not appear on your window.
	MIDDLE NAME	Middle name of the patient.
LAST NAME OR INITIAL	**LAST NAME**	Name, alias, or initial of the patient's last name. **Note**: When using an **initial**, do not use the wildcard characters; however, you can use the wildcard characters when using **names**. **Alias** information is state configurable, so it may not appear on your window.
BIRTH DATE	**BIRTH DATE**	Patient's Date of birth.

SIMPLE FIELD	ADVANCED FIELD	DESCRIPTION
WIC ID	**WIC ID**	Women of Infant Children Identification number.
SIIS PATIENT ID/BAR CODE	**SIIS PATIENT ID/BAR CODE**	State Immunization Information System Patient Identification number or Bar Code.
	BIRTH FILE NUMBER	A unique number associated with the Birth File for the patient.
	MEDICAID NUMBER	A unique number associated with Medicaid for the patient.
CHART NUMBER	**CHART NUMBER**	Patient's medical chart identification number.
GUARDIAN FIRST NAME	**GUARDIAN FIRST NAME**	Patient's guardian's first name.
MOTHER'S MAIDEN NAME	**MOTHER'S MAIDEN NAME (LAST NAME ONLY)**	Patient's mother's maiden name.
STREET **PO BOX OR** **STREET ADDRESS**	**STREET** **PO BOX OR** **STREET ADDRESS**	Patient's Post Office Box number or street address. The following abbreviations can be used: • Box (Bx) • Highway (Hwy) • Center (Ctr • Expressway (Expy) • Heights (Hts) • Junction (Jct) • Lake (Lk) • Square (Sq) • Station (Sta) • Northwest, Northeast, Southwest, Southeast

SIMPLE FIELD	ADVANCED FIELD	DESCRIPTION
		(Currently only supported when there is a space between the words) • Lot (used in context of apartment or space #) • Martin Luther King (Martin L King, MLK)
CITY	**CITY**	Patient's City name of residence.
STATE	**STATE**	Patient's State name of residence.
ZIP CODE	**ZIP CODE**	Patient's Zip Code of residence.
PHONE NUMBER	**PHONE NUMBER**	Patient's telephone number.
CHECK HERE IF ADDING NEW PATIENT		Checkbox to indicate if you will be adding a name for a new patient. When checked, the fields that are required will be highlighted in red. Refer to the section titled, "Adding a New Patient" for more information.

3. Type the search criteria into the corresponding fields using any of these field combinations.

Note: The Search order or field priority is as follows:

- Edit/View (First Name, Last Name, (alias) Birth Date, one family field, one address field)
- SIIS Patient ID (dedicated section below)
- Program ID (i.e., WIC ID; configurable by the state administrator)

- Chart Number
- First Initial/Birth Date (also includes alias. See note below)
- Last Initial/Birth Date (also includes alias. See note below)
- Birth Date
- First Name/Last Name
- First Name (also includes alias)
- Last Name (also includes alias)
- Phone Number

Note: When using initials, you must use the % wildcard character; otherwise, the search will look for an EXACT match versus a LIKE match. An example search for patients named Bob with a specific birth date would be to type the first name of BOB in the First Name field, and then click and type the birth date using the format MMDDYYYY in the BIRTH DATE field.

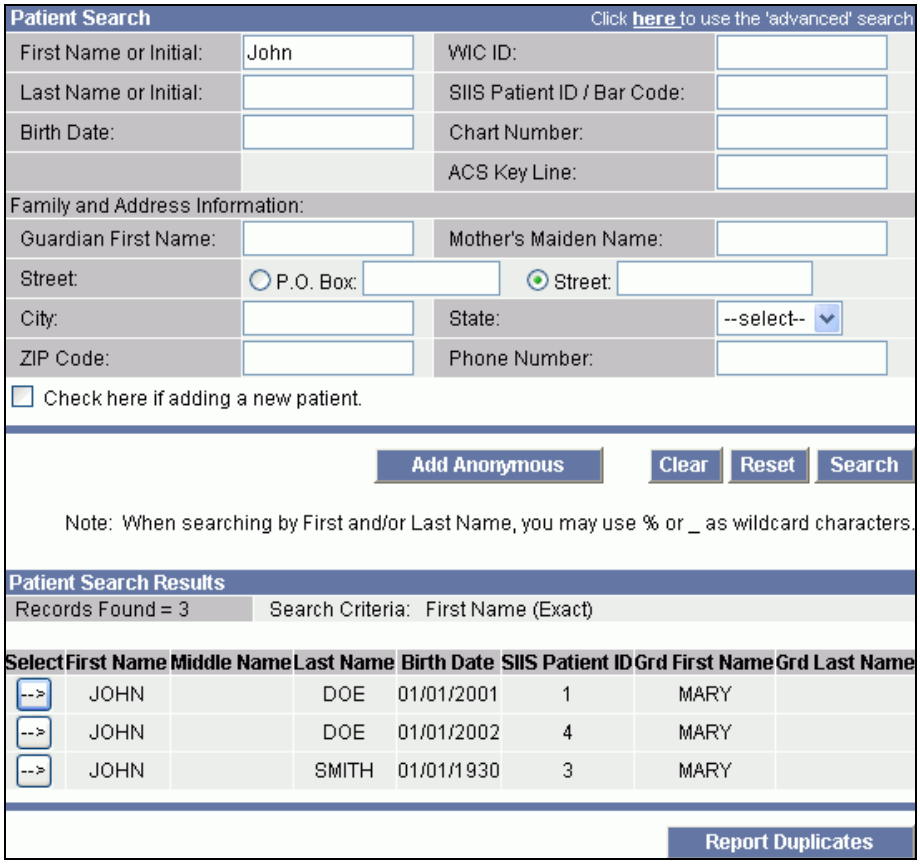
4. Click on one of the available buttons:

- **ADD ANONYMOUS** – (State configurable button) Allows a patient to be added with "minimal demographics" information. Birth date must be entered and optionally VFC Status, Medicaid Number, and Inactive status can be entered. After an anonymous patient is added, the "Patient Demographics" window appears with the First Name and Last Name as Anonymousxx (where xx represents a sequential number). Refer to the section titled, "Anonymous Patient Search/Add."
- **CLEAR ALL** – Erases any newly typed text from all fields. Only the input fields will clear—the previous search criteria will remain on the window.
- **RESET VALUES** – Repopulates the fields to what they were before the **CLEAR ALL** button was pressed.

- **SELECT ARROW** – to select an existing patient and display their "Patient Demographics" window. Continue to the section titled, "Editing a Patient."
- **REPORT DUPLICATES** – to identify patient records that appear to be duplicates. Continue the section titled, "Reporting Duplicates." This is a "state configurable" option.
- **SEARCH** (or the **ENTER** key) – Begins to locate the results for the search criteria entered and displays them in the "Patient Search Results" section of the window. Depending on whether a match is found or not, the "Patient Search Results" window appears with record results or without.

  a) If a **match is found based on the criteria entered**, the "Patient Search Results" appear in the bottom half of the window. Continue to the next step. (In this example, three records were located.)

Figure 11-2: Simple Patient Search with Results and Duplicates Button



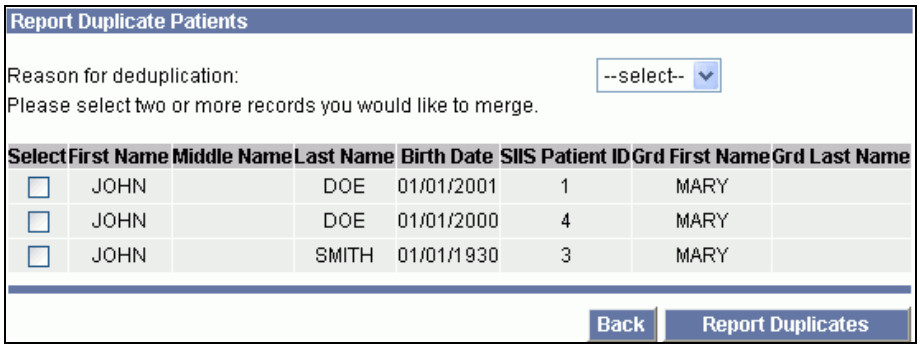
b) If a **match IS NOT found**, you are ready to add the patient. Continue to the next section titled, "Adding a Patient (Simple Method)."

REPORTING DUPLICATES

This button is a "state configurable" option that is useful to identify and report patient records that appear to be duplicates to the System Administrator.

1. From the "Patient Search" window, click the **REPORT DUPLICATES** button. The "Report Duplicate Patients" window appears.

Figure 11-3: Report Duplicate Patients


Report Duplicate Patients

Reason for deduplication: --select--

Please select two or more records you would like to merge.

Select	First Name	Middle Name	Last Name	Birth Date	SIIS Patient ID	Grd First Name	Grd Last Name
☐	JOHN		DOE	01/01/2001	1	MARY	
☐	JOHN		DOE	01/01/2000	4	MARY	
☐	JOHN		SMITH	01/01/1930	3	MARY	

Back | Report Duplicates

2. Click the drop-down menu arrow to view/select a valid reason for the deduplication. The reasons are created by the System Administrator that will populate the drop-down menu field.

3. Select two or more records that you want to merge by clicking the checkbox.

4. Click one of the available buttons:

- **BACK** – to return to the "Patient Search Results" window without reporting the duplicates.
- **REPORT DUPLICATES** – to continue to the "Patient Set Merge" window to indicate the record to merge the records with.

Figure 11-4: Patient Set Merge

Patient Set Merge

Master Patient:		
SIIS ID	1	4
First Name	JOHN	JOHN
Middle Name		
Last Name	DOE	DOE
Suffix		
Birth Date	01/01/2001	01/01/2000
Gender	MALE	
SSN	123-45-8520	
Medicaid Number	951753	
Birth File	35745681	
Race	White	White
Language	ENGLISH	
Mother Maiden Name		
Guardian First Name	MARY	MARY
Guardian Middle Name		
Guardian Last Name		
Guardian SSN		
Street Address	PO BOX 4455	
City	GLENDALE	
State	ARIZONA	
Zip Code	85304	
Phone	(602)241-1502	(602)241-1111
Email	SOMEONE@SOMEWHERE.COM	
Health Plan		
Health Plan ID		
HP Enroll Date		
Birth Order		
Birth Count		

Reason for deduplication: TEST

Testing for Duplicates

Back Merge

5. At the top of the window there is a field labeled **MASTER PATIENT** with radio buttons. Click on the radio button that you want to merge the record with.

6. Directly above the buttons is a field to type any "directive" **comments** regarding the merge.

7. Click one of the available buttons:

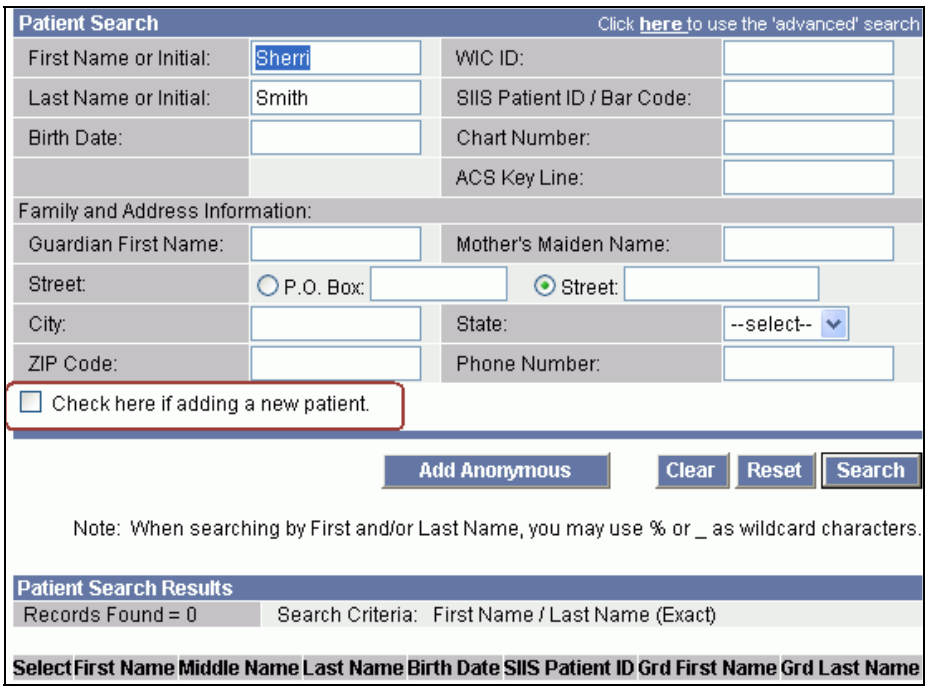
   - **BACK** – to return to the "Report Duplicate Patients" window without performing a merge.
   - **MERGE** – to merge the displayed records to the "selected" master patient.

ADDING A PATIENT (SIMPLE METHOD)

A patient can be added after a Search has been performed and a match is not found.

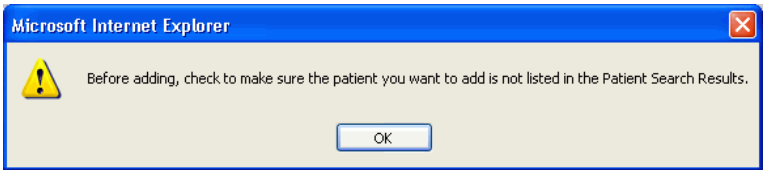
1. Click the "**Check here if adding a new patient**" checkbox (circled in the figure below).

Figure 11-5: Adding a Patient – Simple Method



2. At a minimum, type the "RED labeled" fields. The recommended fields are:
   - First Name, Last Name, Birth Date
   - Guardian FN or Mother's Maiden Name
   - (Complete) Address or Phone Number.
3. Click the **SEARCH** button again. A "Warning Dialog Box" appears asking you to verify the patient does not already exist.

Figure 11-6: Warning Dialog Box – Adding Patient



4. Click the **OK** button. The “Patient Search” window reappears with another message (in green) stating to check the “Search Results” area again to verify non-existence, along with the **ADD PATIENT** button.

5. Click the **ADD PATIENT** button. The “Patient Add” window appears.

Figure 11-7: Patient Add

Patient Add			
First Name:	Sherri	Race:	White Black or African American
Middle Name:		Ethnicity:	--select--
Last Name:	Smith	Language:	--select--
Suffix:	--none--	SSN:	
Birth Date:	06/03/2000	Medicaid #:	
Gender:	--select--	Birth File #:	
Birth Order:		VFC Status:	--select--
Multiple Birth Count:		Inactive:	--select--
		Medicare #:	
Address			
Street:	P.O. Box:	Physical Address:	
	Street:		
Country:	United States		
City:			
State:	--select--	ZIP Code:	
County/Parish:	--select--	District/Region:	
Phone Number:	(602)241-1555	Extension:	
Email:			
School:		Click to select	
Family			
Guardian 1 First:	Dean	Guardian 1 SSN:	
Guardian 1 Middle:		Guardian 2 First:	
Guardian 1 Last:		Guardian 2 Last:	
Mother Maiden:		Guardian Work Phone:	
Other Info			
Health Plan Name:	--select--		
HP Patient ID:		HP Enroll Date:	
Physician:	--select--		
Facility:	--select--		
Next Appt. Date:		Chart Number:	
Birth Country:	United States		
Birth State:	--select--		
Block Recall:	☐		
Allergies:			
Comments:			
Monthly Income:			
Number in Family:			
			Cancel Reset Add Patient

6. The fields and descriptions are listed in the table below.

Table 11-4: Patient Add/Edit & Demographic Field Descriptions

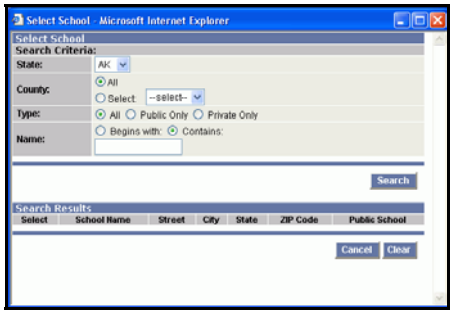
FIELD	DESCRIPTION
PATIENT	
FIRST NAME	Patient's first name. The following can also be used as a First Name: • NEWBORN • BABY • BABY BOY • BABY GIRL
MIDDLE NAME	Patient's middle name.
LAST NAME	Patient's last name.
SUFFIX	Extension of the patient's name. For example: Jr., Sr., IV, etc. Click on the drop-down arrow to select a valid choice.
BIRTH DATE	Date of birth of the patient.
GENDER	Sex of the patient. Click on the drop-down arrow to select a valid choice.
BIRTH ORDER	This field is used when adding twins, triplets, etc. This is the birth order of the patient you are adding. This must be a single whole number. For example, when entering twins, the Birth Order would be 1 or 2 and when combined with the Multiple Birth Count field, the end result would be 1 of 2, 2 of 2, etc. A confirmation dialog box appears to confirm that you are entering "multiple births." Click the OK button. **Note**: The Birth Order field and Multiple Birth Count fields are "merged" on the Patient Demographics window. The field is labeled, **Multiple Birth** (e.g., 1 of 2). The first number is the Birth Order and the second number is the Multiple Birth Count number. After the Birth Order has been entered/saved, only a Registry Client can

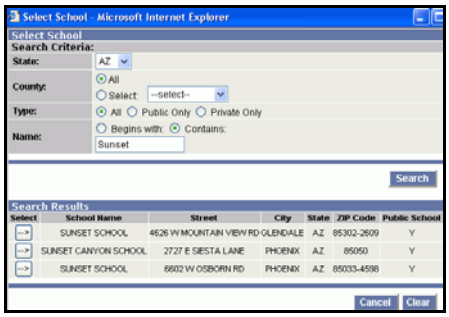
FIELD	DESCRIPTION
	edit the field.
MULTIPLE BIRTH COUNT	This field is used in conjunction with the BIRTH ORDER field. This is the number of the total patients within the multiple births. For example when entering twins, the Birth Order would be 1 or 2 and when combines with the Multiple Birth Count field, the end result would be 1 of 2, 2 of 2, etc. **Note**: The Birth Order field and Multiple Birth Count fields are "merged" on the Patient Demographics window. The field is labeled, **Multiple Birth** (e.g., 1 of 2). The first number is the Birth Order and the second number is the Multiple Birth Count number. After the Multiple Birth Count has been entered/saved, only a Registry Client can edit the field.
RACE	Race of the patient. Click on the drop-down arrow to select a valid choice. (Required in some states.)
ETHNICITY	Ethnic of the patient. Click on the drop-down arrow to select a valid choice. (Required in some states.)
LANGUAGE	Language of the patient. Click on the drop-down arrow to select a valid choice.
SSN	Social Security Number of the patient.
MEDICAID #	A unique number associated with Medicaid for the patient.
BIRTH FILE #	A unique number associated with the Birth File for the patient.
VFC STATUS	Vaccines for Children Status. Click on the drop-down arrow to select a valid choice. (Required in some states.)

FIELD	DESCRIPTION
INACTIVE	Inactivates the patient's record. A drop-down list is available to select the appropriate reason. Examples are: • Moved or gone elsewhere • Deceased • Moved Out of State **Note**: If this field is flagged as DECEASED, only a user with Registry Client Access can change the status.
MEDICARE #	A unique number associated with Medicare for the patient.
ALIAS (State Configurable)	
FIRST NAME	(State configurable) Another first name the patient may have used. **Note**: When a search is performed using first or last name, the alias fields are also included.
LAST NAME	(State configurable) Another last name the patient may have used. **Note**: When a search is performed using first or last name, the alias fields are also included.
ADDRESS	
STREET	Street is state configurable and may not be a required entry for your state. **PO BOX** or **PHYSICAL ADDRESS** can be entered. They can be used separately, or together. **STREET** – If there isn't a PO BOX, a normal street address should be entered, if it wasn't entered initially from the original Search window. May require one of the following for address validation:

FIELD	DESCRIPTION
	• Street Address and City • Street Address and Zip Code • Phone Number The following abbreviations can be used: • Box (Bx) • Highway (Hwy) • Center (Ctr • Expressway (Expy) • Heights (Hts) • Junction (Jct) • Lake (Lk) • Square (Sq) • Station (Sta) • Northwest, Northeast, Southwest, Southeast (Currently only supported when there is a space between the words) • Lot (used in context of apartment or space #) • Martin Luther King (Martin L King, MLK
COUNTRY	Country where patient lives. Click on the drop-down arrow to view the list. United States is the default.
CITY	City name where the patient lives. This may automatically fill if set in the Personal Settings.
STATE	State abbreviation where the patient lives. The State list will populate depending on the Country entered. Click on the drop-down arrow to select a valid choice. This may automatically fill if set in the Personal Settings. **Note**: State must be filled in before selecting the County.

FIELD	DESCRIPTION
ZIP CODE	Zip code where the patient lives. This may automatically fill if set in the Personal Settings.
COUNTY/PARISH	County where the patient lives. **Note**: State must be filled in before selecting the County. Click on the drop-down arrow to select a valid choice. This may automatically fill if set in the Personal Settings.
DISTRICT/ REGION	District or Region where the patient lives. This may automatically fill if set in the Personal Settings.
VALID ADDRESS **(WASHINGTON ONLY)**	(State configurable) Whether or not the patient's address is valid. If the patient's address is not valid, mailings will not be attempted.
BLOCK HEALTH PROMOTION REASON **(WASHINGTON ONLY)**	(State configurable) Reason explaining why Health Promotion mailings should not be sent. This field is labeled "Block Mail Reason" in Manual Deduplication.
PHONE NUMBER	(State configurable) This field is state configurable and may not be a required entry for your state. Telephone number for the patient. The "area code" portion of the phone number may automatically fill if set in the Personal Settings. May require one of the following for address validation: • Street Address and City • Street Address and Zip Code • Phone Number

FIELD	DESCRIPTION
EXTENSION	Extension number for the patient. If an extension number is entered, it will be appended with the **Phone Number** on the Demographics window.
EMAIL	Electronic mail address for the patient to receive Reminder/Recall notices.
SCHOOL	Name of the school the patient attends. Click on the hyperlink labeled "Click to Select" for all the schools in your State. The "Select School" window appears.  Perform the following actions on this window: • **STATE** -- Select the appropriate STATE by clicking on the drop-down. • **COUNTY** – The ALL radio button is chosen by default; however, click the drop-down arrow to select the specific county. The SELECT radio button will then get automatically selected. • **TYPE** (of school)–**ALL** (for both public and private); or **PUBLIC ONLY**; or **PRIVATE ONLY** (for a list of private schools). • **NAME** -- Select **BEGINS WITH** or **CONTAINS** and type the name (or partial name) of the school. • Press the **SEARCH** button. The "Search Results" appear.

FIELD	DESCRIPTION
	 • Click on the **SELECT ARROW** to choose a school—the school will automatically copy into the School field; or click **CLEAR** to erase and type a different name; or click on **CANCEL** to exit and not make a selection.
FAMILY	
GUARDIAN 1 FIRST	Family fields are state configurable and may not be a required entry for your state. First name of the patient's first guardian. May require one of the following for family validation: • Guardian First Name • Mother Maiden Name • Guardian SSN
GUARDIAN 1 MIDDLE	Middle name of the patient's first guardian.
GUARDIAN 1 LAST	Last name of the patient's first guardian.
MOTHER MAIDEN	Family fields are state configurable and may not be a required entry for your state. Maiden name (birth-given last name) of the patient's mother. May require one of the following for family validation: • Guardian First Name

FIELD	DESCRIPTION
	• Mother Maiden Name • Guardian SSN
GUARDIAN 1 SSN	Family fields are state configurable and may not be a required entry for your state. Social security number of the patient's first guardian. May require one of the following for family validation: • Guardian First Name • Mother Maiden Name • Guardian SSN
GUARDIAN 2 FIRST	First name of the patient's second guardian.
GUARDIAN 2 LAST	Last name of the patient's second guardian.
GUARDIAN WORK PHONE	Phone number of the patient's first guardian.
OTHER INFO	
HEALTH PLAN NAME	Name of the health insurance plan the patient is on. Click on the drop-down for a list of valid choices and make a selection.
HP PATIENT ID	Identifying patient number of the Health Plan.
HP ENROLL DATE	Effective date for Health Plan enrollment.
PHYSICIAN	Name of the patient's primary care physician. This may automatically fill if set in the Personal Settings. Click on the drop-down for a list of valid choices.
FACILITY	Name of the Facility the patient visits. This can automatically fill if set in your Personal Settings. A drop-down list is available containing a list of valid choices.

FIELD	DESCRIPTION
	Note: If a Facility Display (Abbreviated) Name was entered for the facility, it will appear in the list as opposed to the full name of the facility.
NEXT APPT DATE	Date of the patient's next appointment. This date is used in Reminder/Recall.
CHART NUMBER	A unique identifying number for the patient's chart.
BIRTH COUNTRY	Country name where the patient was born.
BIRTH STATE	State the patient was born in. Click on the drop-down for a list of valid choices.
BLOCK RECALL	If this box is checked, it indicates the patient will be blocked from REMINDER RECALL.
RECALL COUNT ATTEMPTS	The number of times the patient has been sent a REMINDER RECALL. The system generates this number and displays it on the Demographics window.
ALLERGIES	Any noted allergies for the patient.
COMMENTS	Any additional comments about the patient.
HIGH RISK **(STATE CONFIGURABLE)**	High Risk Categories are added at the state level. These categories will make it easier to identify patients that may have special immunization needs. If this field is highlighted in red, this patient has a high risk entry, (s)he may have special immunization needs. More information is available in the section titled, "Demographics (Regular).
MONTHLY INCOME	Monthly gross income of the patient's family.
NUMBER IN FAMILY	Total number of family members.

FIELD	DESCRIPTION
RECORD INFO (APPEARS ON THE DEMOGRAPHICS WINDOW AFTER A PATIENT IS ADDED)	
SIIS PATIENT ID	State Immunization Information System (SIIS) Patient Identifying Number.
ENTRY DATE	Date the patient was entered into the application.
IRMS OWNER	(State configurable) This field can be suppressed whereby it can appear blank on the Patient Demographics, and Vaccination Detail windows. Identifying number of the Immunization Registry Management System Owner.
LAST UPDATE	Date the patient's information was last updated.

ADVANCED PATIENT SEARCH/ADD

When using the Advanced Search type, you must know one of the following about the patient: **First Name**, **Last Name**, or **Birth Date**.

Note: If you want to use the "Simple Search Method, click on the "Click here to use the 'simple' search" hyperlink. The (Simple) "Patient Search" window appears. Continue to the section titled, "Simple Patient Search/Add."

Advanced searches are useful when you are:

- Positive of how a name or alias is spelled (**EXACT**)
- Unsure of how a name or alias is spelled (**LIKE**). Used with wildcard symbols. A percent sign (%) is used to indicate multiple letters or an underscore (_) is used for a single letter.

- Unsure of a name or alias spelling, but know what it sounds like (**PHONETIC**).

Examples are provided for each type of search.

1. If necessary, click on the **"Click here to use the 'advanced' search"** hyperlink. The (advanced) "Patient Search" window appears.

Figure 11-8: Advanced Patient Search

This window is divided into two major areas—Patient Information (top) and Search Criteria / Types (bottom):

The Patient Information area includes the sections:

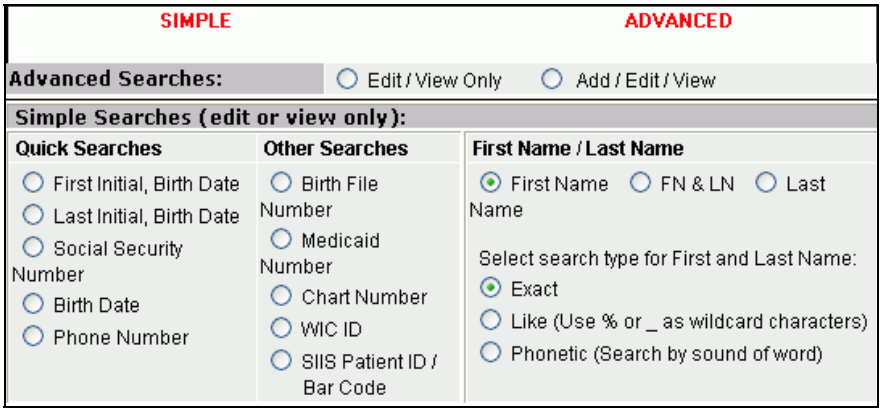
- Patient (Basic Information)

- Patient (Unique Ids)
- Family
- Address

The Search Criteria / Types area is divided into two sections or two types—Simple Search and Advanced Search.

The "known" patient criteria, determines the type of search to perform.

Figure 11-9: Advanced Search Criteria/Types



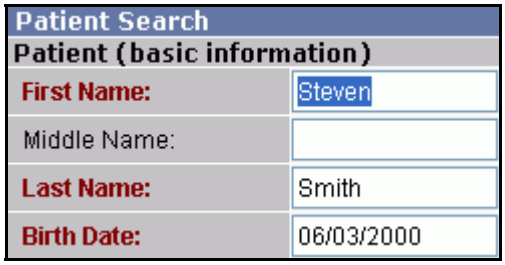
Upon entry to the "Patient Search (/Add)" window, the default setting is Edit/View Only (shown in the "Simple Search" portion of the illustration above).

2. Depending on the type of search you need to perform, you may need to click a different radio button. The types of searches that can be done are (examples of each are forthcoming):

- Exact – (Default type.) This radio button implies you are positive of how a name is spelled.

  a) Type the first name and last name in the appropriate fields. For example, type: `Steven Smith`

Figure 11-10: Exact Match Example



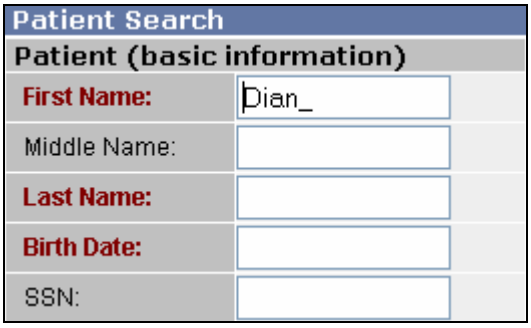
b) The **FN** & **LN** and the **EXACT** radio buttons will automatically be selected.

Figure 11-11: Advanced Exact Search Example—Search Criteria/Type

- Like – This radio button implies you are unsure of how a name is spelled. Used with wildcard characters (% and/or _). Example; we know the patient's name is either Diane or Diana; so we are unsure about the last letter. We could approach our search using the underscore (_) wildcard character.

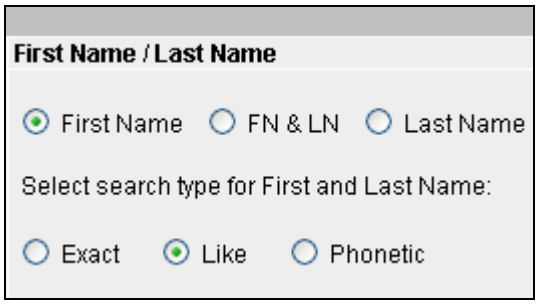
a) Type the first four letters of the name followed by an underscore. For example, type: `Dian_`

Figure 11-12: Advanced Like Search Example



b) The **FIRST NAME** radio button will automatically get selected. Click the **LIKE** radio button.

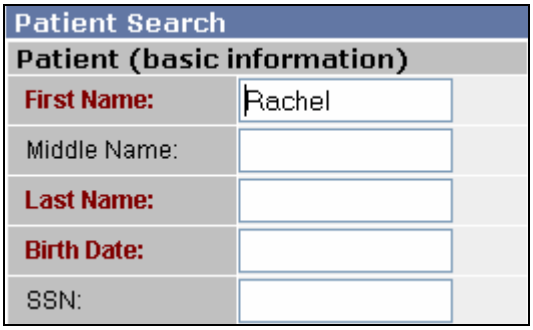
Figure 11-13: Advanced Like Search Example—Search Criteria/Type



- Phonetic – This radio button implies you are unsure how a name is spelled, but you know how it sounds. Example; we know how the patient's name is pronounced, but unsure how to spell it. For example, the name Rachael could be spelled various ways and maybe it is really Rochelle.

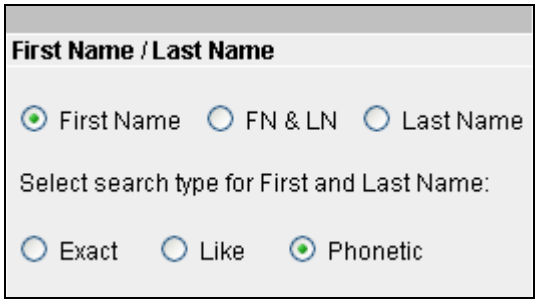
  a) Type the name the way you think it is spelled. For example, type: `Rachel`

Figure 11-14: Advanced Phonetic Search Example



  b) The **FIRST NAME** radio button will automatically get selected. Click the **PHONETIC** radio button.

Figure 11-15: Advanced Phonetic Search Example—Search Criteria/Type



3. Refer to the fields and descriptions in Table 11-3 above in the column labeled Advanced Field.

4. Determine the "type of search" you want to perform (Exact, Like, or Phonetic examples shown above).

5. Type the search criteria into the respective field(s). When you type the data into the fields, most of the radio buttons in the "Search Criteria/Type" section of the window will automatically be selected—excluding the Like or Phonetic radio buttons.

Note: When typing data into more than one field using a wildcard character, you must use a wildcard character in each of the fields. For Example: To search for all patients named Bob with a last name beginning with Bark. You would type B% in the First Name field, and Bark% in the Last Name field or an error will appear at the top of the window in red text.

6. Click one of the following buttons:

- **CLEAR** – to erase your newly entered text from the fields and remains on the same window.
- **RESET** (only activates after a **CLEAR ALL**) – Repopulates the fields to what they were before the **CLEAR ALL** was pressed.
- **SEARCH** (or the **ENTER** key) – Searches the database using the data entered and displays the "Patient Search Results" if any records are located. The view of the "Patient Search" window will focus on the "Patient Search Results" section.

  a) **If a match is found**, it will appear in the "Patient Search Results" section. Select the patient you want to work with by clicking the **SELECT** arrow. Continue to the section titled, "Editing a Patient."

  b) **If a match is NOT found** and you want to **ADD** the Patient, click the **EXACT** radio button and verify the name is spelled properly; i.e., remove wildcard characters if used. Continue to

the section titled, "Adding a Patient (Advanced Method)."

ADDING A PATIENT (ADVANCED METHOD)

When adding a new patient, a Patient Search is always performed first to verify the patient does not already exist in the system.

Figure 11-16: Patient Search – Advanced Method

1. Point and click the **Add/Edit/View** radio button.
2. At a minimum, type the "RED labeled" fields. For example, type
   - First Name, Last Name, Birth Date

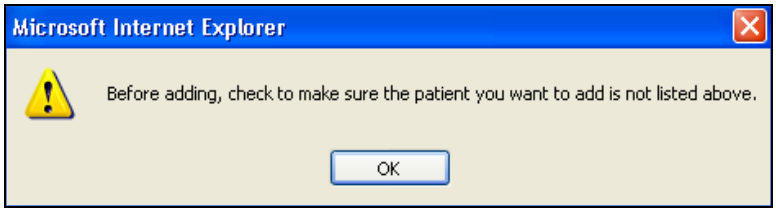
3. Type data in (at least) one field of the Family section:
   - Guardian First Name
   - Guardian SSN
   - Mother's Maiden Name (last name only)

   For example, Samantha is the Guardian's First Name.

4. Type either the (entire) Address (Street including City, State, Zip) or Phone Number for the Patient. For example, type the phone number (shown below):

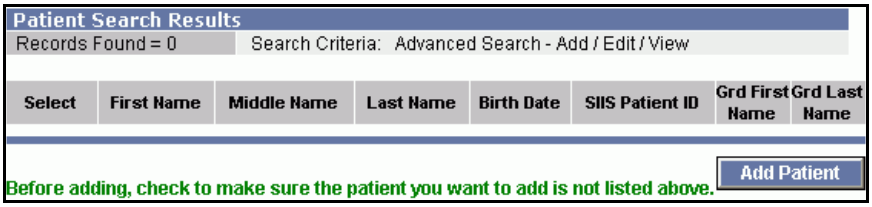
5. Click the **RUN SEARCH** button. A dialog box appears requesting you to check for duplications.

Figure 11-17: Patient Add – Advanced - Warning Dialog Box



6. Click the **OK** button. Another message highlighted in green text appears requesting you to review the "Patient Search Result" to ensure the patient you are adding does not already exist.

Figure 11-18: Patient Add – Advanced – Second Warning Dialog Box



7. Verify the patient's existence:
   - If the patient exists already, point and click the **SELECT ARROW**. Refer to the section titled, "Editing a Patient" for instructions on "updating" patient information.
   - If the patient **DOES NOT** exist, click the **ADD PATIENT** button. The "Patient Add" window appears.

Patient Add

First Name:	Sherri	Race:	White Black or African American
Middle Name:		Ethnicity:	--select--
Last Name:	Smith	Language:	--select--
Suffix:	--none--	SSN:	
Birth Date:	06/03/2000	Medicaid #:	
Gender:	--select--	Birth File #:	
Birth Order:		VFC Status:	--select--
Multiple Birth Count:		Inactive:	--select--
		Medicare #:	

Address

Street:	○ P.O. Box:	Physical Address:	
	◉ Street:		
Country:	United States		
City:			
State:	--select--	ZIP Code:	
County/Parish:	--select--	District/Region:	
Phone Number:	(602)241-1555	Extension:	
Email:			
School:		Click to select	

Family

Guardian 1 First:	Dean	Guardian 1 SSN:	
Guardian 1 Middle:		Guardian 2 First:	
Guardian 1 Last:		Guardian 2 Last:	
Mother Maiden:		Guardian Work Phone:	

Other Info

Health Plan Name:	--select--		
HP Patient ID:		HP Enroll Date:	
Physician:	--select--		
Facility:	--select--		
Next Appt. Date:		Chart Number:	
Birth Country:	United States		
Birth State:	--select--		
Block Recall:	☐		
Allergies:			
Comments:			
Monthly Income:			
Number in Family:			

Cancel | Reset | Add Patient

8. Enter as much information as possible into the fields. If necessary, refer to Table 11-4 for a list of fields and their descriptions.

9. Click on one of the available buttons.

   - **ADD PATIENT** – to save all of your information and display the "Patient Demographics" window. You will have an opportunity to EDIT the record and UPDATE PROGRAMS. (Refer to the sections titled, "Editing a Patient" and "Updating Programs," respectively.
   - **RESET** – to erase your newly typed items and remain on the same window.
   - **CANCEL** – to erase your newly typed items and exit to the "Patient Search" window.

ANONYMOUS PATIENT SEARCH/ADD

Anonymous patients are those who have "opted out" or are exempt from the registry. By adding an anonymous patient, allows the patient's vaccination data to be included in the central registry specifically for inventory and CASA purposes.

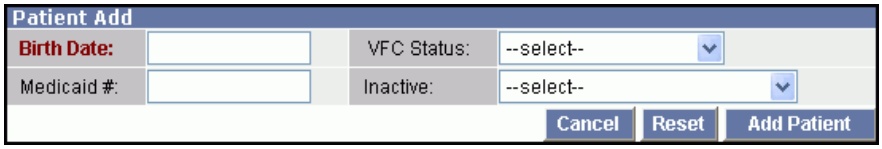
To add an anonymous patient, perform the following:

1. Perform a **Patient Search** (using Anonymous%) to ensure the patient doesn't exist.

   - If the patient exists, the "Anonymous Patient Demographics Edit" window appears. Continue to the section titled, "Editing an Anonymous Patient."

2. Click on the **ADD ANONYMOUS** button. The "Patient Add" window appears.

Figure 11-19: Add Anonymous Patient



3. At a minimum, type data into the **RED** labeled fields such as **Birth Date**. Optionally, type in the **Medicaid #**, and click on the drop-down arrows to select the **VFC Status**, and **Inactive** (Reasons).

4. Click one of the available buttons:

- **CANCEL** – to not save and exit to the Patient Search window.
- **RESET** – to erase newly typed/selected field entries and remain on the window to re-enter fields.
- **ADD PATIENT** – to save and add the patient data and display the "Patient Demographics" window.

Note: After an anonymous patient is added, the "Patient Demographics" window appears with the First Name and Last Name as Anonymousxx (where xx represents a sequential number).

BARCODE/SCANNER PATIENT SEARCH

When searching for a patient using the barcode, a printed document containing the Patient ID in barcode format must exist. This barcode document can be scanned from a Patient Record Report, an Immunization Record Card, or a Reminder Recall Postcard.

Note: Scanner Installation and Setup can be located in **Appendix A**.

1. Position the cursor in the **SIIS Patient ID / Bar Code** field. (By positioning the cursor, the **SIIS Patient ID / BAR CODE search radio** button automatically selects.)
2. To scan, simultaneously perform the following:
   - **Aim** at the center of the barcode, hold the scanner 0" – 1" above the barcode.
   - **Press** the **button** (located on the under side of the scanner).
3. The scanner beeps and displays a green LED and the "Patient Search Results" window appears.

DEMOGRAPHICS

When editing a patient's record, it begins from the "Patient Demographics" window.

Note: While on the "editing" window, no other menu selections can be made excluding the Cancel Edits option under the MAIN menu. It is recommended you make changes as quickly as possible.

If a **PATIENT SEARCH** has not been performed, perform a search first; otherwise, you can click on the **Demographics** menu option to begin editing the previously "searched" patient.

Perform one of the following to access the "Patient Demographics" window.

1. Perform a **PATIENT SEARCH** and select the desired patient from the "Patient Search Results" window by pointing and clicking the **SELECT ARROW**. The "Patient Demographics" window appears.

- When you search for a patient, any patient who has opted out will display in the search results with red lettering. Only the owner (IRMS) of the record and Registry Client users can select the patient – anyone else will get a dialog box with a message.

  a) This dialog box text is set on the properties page by a system administrator. This dialog text section will only show for clients who have purchased SIIS-Opt Out. Only a Registry Client user can opt in/out a patient.

  b) The patient is selected and then the **OPT IN/OUT** button is pressed to change their status (patient demographics screen). The button should correctly indicate **OPT IN** or **OPT OUT**.

  c) Owning and Registry Client users should be able to edit and add shots as normal.

2. Click on the **DEMOGRAPHICS** option under the **PATIENT** menu. The "Patient Demographics" window appears.

Figure 11-20: Patient Demographics

Patient Demographics

Patient			
First Name:	JOHN	Race:	
Middle Name:		Ethnicity:	
Last Name:	DOE	Language:	
Suffix:		Medicaid:	
Birth Date:	01/01/2001	Birth File:	
SSN:		VFC status:	(ineligible)
Gender:	MALE	Inactive:	
Age:	246 weeks, 56 months, 4 yrs	Medicare:	
Multiple Birth:	1 of 1		
Address			
Street:	67 E. WELDON	Physical Address:	
City:	PHOENIX		
Country:	United States	State:	AZ
ZIP Code:	85011	County/Parish:	
Phone Number:		District/Region:	
Email:			
School:			
Family			
Grdn 1 First Nm:	MARY	Grdn 1 SSN:	
Grdn 1 Middle Nm:		Grdn 2 First Nm:	
Grdn 1 Last Nm:		Grdn 2 Last Nm:	
Mother Maiden Nm:		Grdn Work Phone:	
Other Info			
Physician:	BRADY, MARCIA MD	Health Plan Name:	
Facility:		HP Patient ID:	
Chart Number:		HP Enroll Date:	
Next Appt. Date:		Birth Country:	
Block Recall:		Birth State:	
Recall Attempts:	0	Allergies:	
Program/Mem.IDs:		High Risk:	
Monthly Income:		Number In Family:	
Comments:			
Record Info			
SIIS Patient ID:	1	IRMS Owner:	1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Entry Date:	09/21/2005 06:28:11	Last Update:	09/21/2005 09:33:16

Edit High Risk Categories | Update Programs | Opt Patient Out | Back | Edit

Health Promotions Info

3. Perform one of the following by pointing and clicking one of the buttons:

- **EDIT HIGH RISK CATEGORIES** – (State Configurable) – Allows the user to select 1 or more high risk medical categories that are appropriate for the

patient. Continue to the section titled, “Editing High Risk Categories” for instructions.

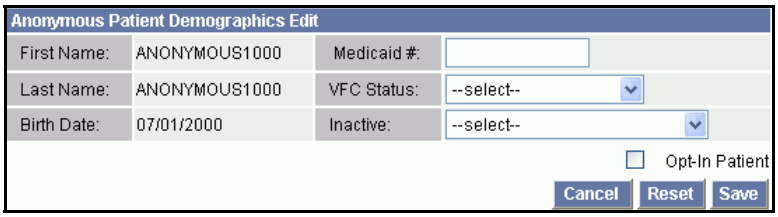
- **UPDATE PROGRAMS** - to add or change the patient's special state programs such as WIC, KIDSHOTS, or KIDVACCS. Refer to the next section titled, "Updating a Patient's Programs."
- **HEALTH PROMOTIONS INFO** – to access the “Health Promotions Module.” You must have the access level and permissions to use this module. Health Promotions has a separate Application User Guide.
- **EDIT** - to display the "Patient Demographics-Edit" window and change the patient's record. Continue to the section titled, “Editing Patient Demographics.”
- **BACK** – to redisplay the “Patient Search – Search Results” window.
- **OPT PATIENT IN/OUT** – (Only available to Registry Client users). This button toggles Opt In and Opt Out. When the **OPT IN** displays, it permits the patient to join the registry and requires regular information to be entered for the patient. The **OPT OUT** button removes all data from the patient master and patient reserve tables. The data that remains is the IRMS id, Patient Birth Date, VFC Status, and Inactive Status. The Patient record becomes “Anonymous.”

Note: When a patient already exists in the registry, a user can only “opt out” a patient they own.

a) An **OPT IN** checkbox will display on “Anonymous” records to allow the patient to join the registry. When checked, the regular “Patient Demographics” window appears for required information to be entered.

b) If the patient were entered as “Anonymous,” the “Anonymous Patient Demographics Edit” window appears.

Figure 11-21: Anonymous Patient Demographics Edit



c) Make any necessary changes and click **SAVE** to save the changes, **CANCEL** to not save changes and return to the previous window, or **RESET** to erase newly entered data and remain on the window.

EDITING PATIENT DEMOGRAPHICS

To edit a patient's record, referred to as Demographics, perform the following:

1. Click the **EDIT** button on the "Patient Demographics" window. The "Patient Demographics – Edit" window appears.

Figure 11-22: Patient Demographics - Edit

Apply Defaults from Personal Settings to this Record

Patient Demographics Edit

First Name:	JOHN	Race:	White Black or African American
Middle Name:		Ethnicity:	--select--
Last Name:	CHAPMAN	Language:	--select--
Suffix:	--none--	SSN:	
Birth Date:	01/01/1994	Medicaid #:	
Gender:	MALE	Birth File #:	
Birth Order:		VFC Status:	--select--
Multiple Birth Count:		Inactive:	--select--
		Medicare Id:	

Address

Street:	P.O. Box:	Physical Address:	
	Street: RT. 1 BOX 266		
City:	LOGANSPORT		
Country:	United States		
State:	LA	ZIP Code:	71049
County/Parish:	--select--	District/Region:	
Phone Number:	(318)697-4614	Extension:	
Email:			
School:		Click to select	

Family

Guardian 1 First:		Guardian 1 SSN:	
Guardian 1 Middle:		Guardian 2 First:	
Guardian 1 Last:		Guardian 2 Last:	
Mother Maiden:		Guardian Work Phone:	

Other Info

Health Plan Name:	--select--		
HP Patient ID:		HP Enroll Date:	
Physician:	--select--		
Facility:	--select--		
Next Appt. Date:		Chart Number:	
Birth Country:	--select--		
Birth State:	--select--		
Block Recall:			
Allergies:			
Comments:			
Monthly Income:			
Number in Family:			

Share with Other Registries Opt-Out Patient

Cancel Reset Save

2. Refer to the Table 11-4 for a list of fields and descriptions.

3. The available checkboxes are:

- **Apply Defaults You Have Set In Your Personal Settings** – (Located at the very top of the window). Click in the checkbox if you desire to apply your defaults. If selected, your defaults will not overwrite existing data. Continue to the next step.
- **Do not take ownership of this record (checkbox)** – When this checkbox is checked, it prevents the IRMS from taking ownership of the patient record. A text message will appear at the top of the Vaccination Detail window when administering shots notifying the user that upon saving this vaccination(s), ownership will not be taken by the IRMS. Ownership remains with the previous owning IRMS and is not changed to the IRMS making the edit or adding the shot(s).

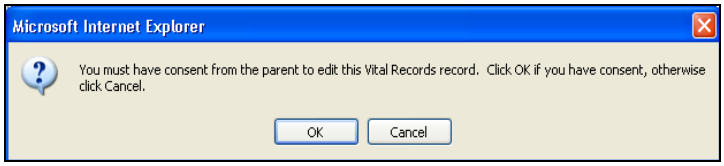
  a) If the user account does not allow changes to be made to records, or the IRMS is blocked from ownership, then the checkbox will not appear.

  b) If the IRMS that the user is logged in as already owns this patient, then the checkbox will not appear
- **Opt Out** – (not shown in the figure) When the **OPT OUT** checkbox is checked, a warning message appears asking, "Are you sure you want to opt out for this patient?" Click **OK** to confirm or **CANCEL** to not confirm. After the OPT OUT checkbox is selected, all data will be removed from the patient master and patient reserve tables. The data that remains is the IRMS Id, Patient Birth Date, VFC Status, and Inactive status. The record will be "flagged" as anonymous.
- **Share With Other Registries** (State configurable) – If the checkbox is checked, this enables this patient record to be exported via HL7 to remote registries (State Central Registry and State-to-State). Records that are not checked, will not be exported. This option will not affect incoming updates to patient records (vaccync, queries, etc.). This setting can not be transferred or changed during updates from external systems.

4. Make the necessary change(s) and then click one of the available buttons:
   - **CANCEL** – does NOT save changes and exits to the "Patient Demographics" window.
   - **RESET** – erases the newly entered selections and remains on the "Patient Demographics-Edit" window.
   - **SAVE** – updates the database with your change(s) and exits to the "Patient Demographics" window.

Note: Depending on your state, you may see a "consent" dialog box.

Figure 11-23: Consent Dialog Box (State Configurable)



a) If you click **OK**, the "Patient Demographics" window re-displays.

b) Obtain consent and then click **OK** or click **CANCEL**.

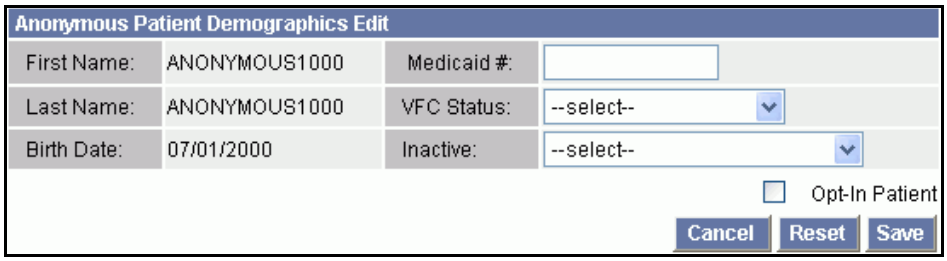
EDITING A PATIENT - ANONYMOUS

Anonymous patients are those who have "opted out" or are exempt from the registry. By adding an anonymous patient allows the patient's vaccination data to be included in the central registry specifically for inventory and CASA purposes.

To edit an anonymous patient, perform the following:

1. Perform a **Patient Search** to ensure the patient exists.
2. Click on the **SELECT** button to select the anonymous patient. The "Patient Demographics" window appears.
3. Click on the **EDIT RECORD** button. The "Anonymous Patient Demographics Edit" window appears.

Figure 11-24: Anonymous Patient Demographics Edit



4. Make the changes and press one of the available buttons:

- **CANCEL** – to not save entries made and return to the "Patient Demographics" window.
- **RESET** – to erase newly entered/selected entries and remain on the window.
- **SAVE** – to save the changes and return to the "Patient Demographics" window.

Note: The **OPT IN** / **OPT OUT PATIENT** checkbox is available to Registry Client users.

- The **OPT IN** checkbox will display on anonymous records to allow the patient to join the registry. When checked, the regular "Patient Demographics" window appears for required information to be entered. When the patient already exists in the registry, a user can only "opt out" a patient they own.
- The **OPT OUT** checkbox will appear at the bottom of the regular "Patient Demographics-Edit" window. When the OPT OUT checkbox is checked, a warning message appears asking, "Are you sure you want to opt out for this patient?" Click **OK** to confirm or **CANCEL** to not confirm.

  a) After the OPT OUT checkbox is selected, all data will be removed from the patient master and patient reserve tables. The data that remains is the IRMS Id, Patient Birth Date, VFC Status, and Inactive status.

  b) The patient record becomes "Anonymous."

UPDATING A PATIENT'S PROGRAMS

This option allows you to enter special programs offered by your state. For example, WIC, KIDSHOTS, KIDVACCS, etc. These programs will differ per state.

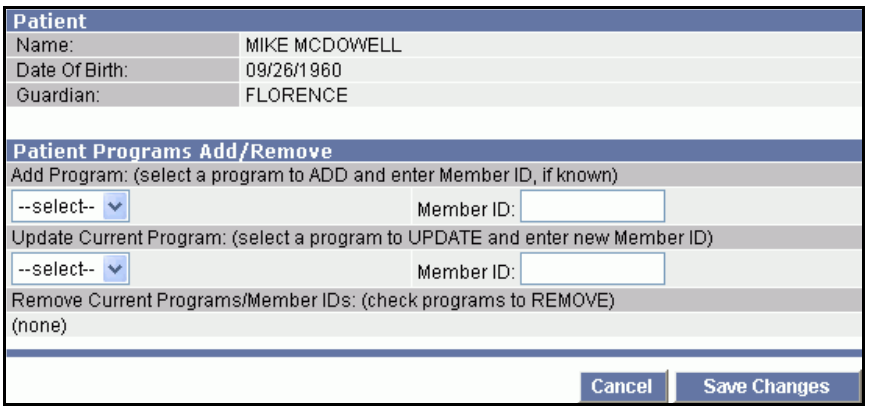
You can perform the following from this window:

- Add Programs and Member IDs
- Update/Edit Programs and Member IDs
- Remove Programs and Member IDs

This option is not directly off the menu but begins on the "Patient Demographics" window. You must perform a Patient Search first. If necessary, refer to the section regarding Patient Search (/Add).

1. From the "Patient Demographics" window, point and click on the **UPDATE PROGRAMS** button. The "Patient Programs Add/Remove" window appears.

Figure 11-25: Patient Programs Add/Remove



2. If **Adding a Program**, perform the following; otherwise, continue to the next step.

- Under the Add Program section, click on the drop-down arrow to view/select a list of available program choices.
- Select the Program by pointing and clicking it.

Note: All Programs are entered into the registry at the state level. If you want to track a program that

is not on the list, contact the state to have it added.

- Press the **TAB** key.
- Type the **MEMBER ID** (if known).
- Click the **SAVE CHANGES** button. The "Patient Demographics" window re-appears.

Note: When you re-enter this window, your change(s) will display under the sections titled "Update Current Programs" and "Remove Current Programs" followed by the Member IDs.

3. If **Updating a Current Program**, perform the following bulleted items; otherwise, continue to the next step.
   - Under the **UPDATE CURRENT PROGRAM** section, click on the drop-down menu arrow to view/select an available program choice.
   - **Select** the Program by pointing and clicking it.
   - Press the **TAB** key.
   - Update the **MEMBER ID** (if necessary).
   - Click the **SAVE CHANGES** button. The "Patient Demographics" window re-appears.
4. If **Removing a Current Program**, perform the following bulleted items; otherwise, continue to the next step.
   - Under the **REMOVE** section, click on the Checkbox to the left of the Program to remove.
   - Click the **SAVE CHANGES** button. The "Patient Demographics" window re-appears.

Note: You cannot update and remove at the same time. In other words, if you attempt both actions, a **REMOVE** will override the update.

EDITING HIGH RISK CATEGORIES

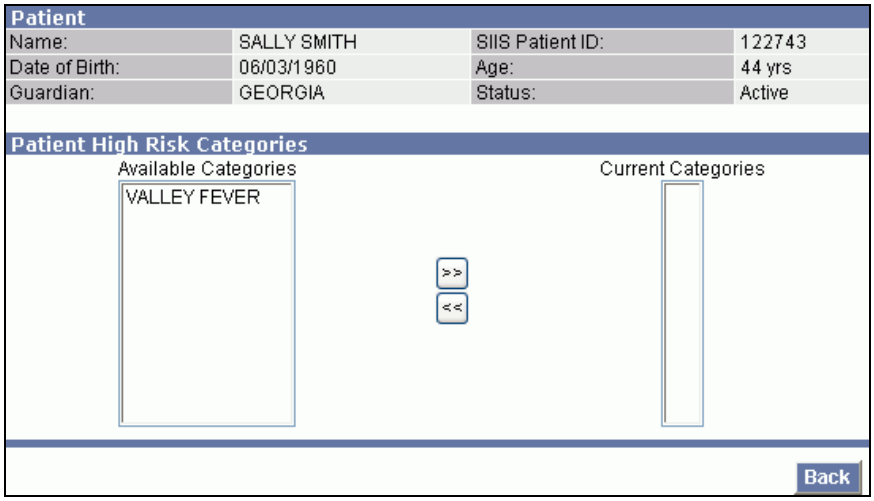
This is a state configurable option that allows the user to select 1+ high risk medical categories that are appropriate for the patient. If the state

has not defined any categories, this functionality will be invisible to the end user.

Note: These conditions are private and cannot be seen outside of the IRMS; however, a flag indicating the patient has 1+ high risk categories will be public information. The flag is a message stating to "Contact the primary care provider for more information about this patient's high risk categories."

1. From the "Patient Demographics" window, click the **EDIT HIGH RISK CATEGORIES** button. The "Patient High Risk Categories" window appears.

Figure 11-26: Patient High Risk Categories



2. In the bottom section of the window there are two categories: Available and Current. To move an Available Category to the Current Category, perform the following:

- Highlight the Available Categories. To select more than one category,

  a) In a sequence, hold the **SHIFT** key, click the first category in the sequence, and then click the last category in the sequence.

  b) Not in a sequence, hold the **CTRL** key and click on each category.

- Click the (**RIGHT) ARROW** button to copy the Available Categories to the Current Categories column.

3. To remove a Current Category back over to the Available Categories, perform the following:
   - Highlight the Current Categories. To select more than one category,
     - **a)** In a sequence, hold the **SHIFT** key, click the first category in the sequence, and then click the last category in the sequence.
     - **b)** Not in a sequence, hold the **CTRL** key and click on each category.
   - Click the (**LEFT) ARROW** button to copy the Current Categories to the Available Categories column.
4. A red confirmation message appears at the top of the window stating, "Patient High Risk Categories Successfully Changed."
5. Click the **BACK** button to return to the "Patient Demographics" window. The "High Risk" field will display in red.

REMOTE REGISTRY

The "Remote Registry" option allows you to **query** other immunization registries for existing vaccination records for an existing patient. This provides a solution similar to the "single inquiry" found within the PCI Gateway Client.

The "Remote Registry" option will only display after a patient has been searched for and selected or added.

The "state-to-state" User Agreement system will depend on both states ("home-state" and "out-of-state") that are using the IWEB Registry or a registry with similar capabilities. To clarify these states, "home state" is the registry that requests access to a patient record in another state and "out of state" is the registry providing access to a requesting provider/user.

The "home state" registry administrator will obtain a login account and the "out of state" agreement from the "out-of'-state" registry administrator.

The "home state" registry administrator will then enter this information into their "home-state" registry. The "home state"

system (IWEB for example) will then be responsible for assuring that only logged in users who have agreed to the "out-of-state" registry user agreement, are allowed to query the "out-of-state" registry.

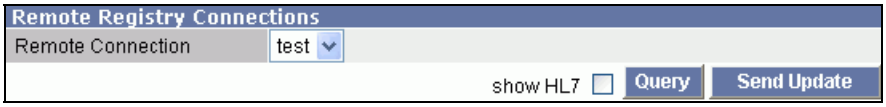
The "out-of-state" registry cannot block a specific user from querying the "out-of-state" registry; however, every query is logged in the "out-of-state" registry with the "home-state" registry username. In cases of misuse, "out-of-state" registry staff may contact the "home-state" registry staff and request that a specific user be denied query access, or in extreme cases, the "out-of-state" registry staff can disable the entire "home-state" registry account.

1. Perform a **PATIENT SEARCH** on the patient whose records you want to match and merge vaccination records.
2. From the "Patient Menu, click the **REMOTE REGISTRY** option. One of two windows may appear:
   - The "User Agreement Acceptance" window.

Figure 11-27: User Agreement Acceptance

   - The "Remote Registry Connections" window.

Figure 11-28: Remote Registry Connections



3. If the "User Agreement Acceptance" window appears, read the agreement and click **YES** if you agree to the terms listed, or click **NO** if you do not agree to the terms.

Note: Once you click **YES**, you will not see this window again unless a new User Agreement has been created.

4. If the "Remote Registry Connections" window appears, click the drop-down menu arrow to select the **REMOTE CONNECTION**.

5. Click on the **QUERY** button. The "matching" process begins.

   - If an **EXACT** match is found, no vaccination records will appear.
   - If matches are found, the records will appear on the "Remote Registry Connections" window below the "User Agreement" message (shown below).

Figure 11-29: Remote Registry Connections with Patient Records

Remote Registry Connections

Remote Connection: test

show HL7 ☐ Query Send Update

User Agreement

The use of the following information is bound by the conditions of the Test which you accept on 12/06/2004.

Patient 1	test - Remote	STC - Local
Patient ID	122724	1
First name	JANE	JOHN
Middle name		
Last name	DOE	DOE
Suffix		
Birth date	01/01/2001	01/01/2001
SSN		123-45-8520
Gender	F	MALE
Street	123 MAIN ST	123 MAIN ST
City	GLENDALE	GLENDALE
ZIP code	85301	85304
Phone	(654)840-9819	(602)241-1502
Mother maiden name		

Get Vaccination Record 1

Patient 2	test - Remote	STC - Local
Patient ID	122710	1
First name	JOHN	JOHN
Middle name		
Last name	DOE	DOE
Suffix		
Birth date	01/01/2001	01/01/2001
SSN		123-45-8520
Gender		MALE
Street	123 MAIN ST	123 MAIN ST
City		GLENDALE
ZIP code		85304
Phone		(602)241-1502
Mother maiden name		

Get Vaccination Record 2

Patient 3	test - Remote	STC - Local
Patient ID	57600	1
First name	JOHNNA	JOHN
Middle name	M	
Last name	DAY	DOE
Suffix		
Birth date	08/17/2000	01/01/2001
SSN		123-45-8520
Gender		MALE
Street		123 MAIN ST
City		GLENDALE
ZIP code		85304
Phone		(602)241-1502
Mother maiden name		

Get Vaccination Record 3

6. Review and compare the records trying to locate the record that best matches. Once you locate the best record, click the **GET VACCINATION RECORD (#)** button to view all the vaccinations. The "Patient Record and all Vaccinations" window appears.

Figure 11-30: Patient Record & All Vaccinations

Remote Registry Connections

Remote Connection: test

show HL7 ☐ Query Send Update

User Agreement

The use of the following information is bound by the conditions of the Test which you accept on 12/06/2004.

Patient Record	test - Remote	STC - Local
Patient ID	122724	1
First name	JANE	JOHN
Middle name		
Last name	DOE	DOE
Suffix		
Birth date	01/01/2001	01/01/2001
SSN		123-45-8520
Gender	F	MALE
Street	123 MAIN ST	123 MAIN ST
City	GLENDALE	GLENDALE
ZIP code	85301	85304
Phone	(654)840-9819	(602)241-1502
Mother maiden name		

Vaccinations

Vaccine	CDC Code	CPT Code	SIIS Code	Date
☐ DTaP	20	90700	20	03/01/2001
☐ DTaP	20	90700	20	05/01/2001
☐ DTaP	20	90700	20	07/01/2001
☐ DTaP	20	90700	20	01/01/2002
☑ Hib, NOS *new*	17	90645	47	03/01/2001
☑ Hib, NOS *new*	17	90645	47	05/01/2001
☑ Hib, NOS *new*	17	90645	47	07/01/2001
☑ Hib, NOS *new*	17	90645	47	01/01/2002
☑ MMR *new*	03	90707	3	01/29/2002
☐ varicella	21	90716	21	01/01/2002

Reset Merge Vaccinations

7. In the Vaccinations section, any vaccines that are "unchecked" will not merge. Conversely, those that are checked will get merged.

8. Click one of the available buttons:

   - **RESET** – to erase any newly selected/checked items and remain on the same window.
   - **MERGE VACCINATIONS** – to merge the vaccinations and display the patient's "Vaccination View/Add" window. A red confirmation message appears at the top of the window denoting the vaccination (with the vaccine and merge date) record was merged.

Figure 11-31: Vaccination View/Add

Vaccination 'IPV', administered 06/02/2004 was added

Patient

Name:	NATHAN BUNKER	SIIS Patient ID:	122745
Date of Birth:	12/08/1996	Age:	7 yrs
Guardian:	MARY	Status:	Active

Print Page

Vaccination View/Add

(historicals marked by *, adverse reaction marked by #)

Facility where vaccines documented: --select--

Double-click in any date field below to enter the default date: 07/26/2004

Vaccine	1	2	3	4	5
DTaP	05/04/2003	X 03/19/2004	X 05/03/2004	X 05/04/2004	
Td (Adult)	04/30/2004				
IPV	06/02/2004				
Hib--HbOC	X 05/04/2004				
Hep B/Hib	X 03/31/2004				
MMR	03/31/2004				
Varicella	05/28/2004				
Hepatitis B--adol. or pediatric	03/31/2004				
DTaP, 5 pertussis antigens					
DTaP--unspecified					
DTaP/Hib					
DTaP/Hep B/IPV					
DT (Pediatric)					
Hib--unspecified					
Hep B Ped/Adol - Preserv Free					
Pneumococcal(PCV7)					
--select--					
--select--					
--select--					

Add Administered | Clear All | Add Historicals

- Vaccinations outside the ACIP schedule are marked with an 'X'.
- If a combination vaccine is marked with a 'X', please verify which components of the vaccine are outside the ACIP schedule by viewing the Vaccination Summary.
- Vaccinations administered or recorded in your facility are displayed in **blue**.
- Compromised vaccinations are highlighted in yellow.

Add Smallpox History | Contraindications | Deferrals

9. The vaccination record has been merged. You can use any other menu and/or option.

12 VACCINATIONS MENU

The Vaccination Menu allows you to **View**, **Add**, **Forecast**, and **Summarize** vaccination information.

This menu has three options:

- View/Add
- Forecast
- Summary

Locate the name of the menu option you want to use and continue to its coinciding section.

VIEW/ADD (VACCINATIONS)

All vaccination information is viewed, added, and edited from inside this option. From the View/Add window, you can perform the following:

- View additional details about the vaccination including comments about the vaccine
- Edit and/or delete vaccination information
- Add new vaccination (shot administrations)
- Add historical vaccination information
- Add smallpox history prior to the year 1990
- Add chickenpox disease (state configurable)
- Add contraindications
- Forecast (an option that is either on or off)

VIEWING ALL VACCINATIONS FOR A PATIENT

The System Administrator has the authority to setup the Vaccinations in alphabetical order. If this has been setup, the vaccinations will appear in alphabetical order. First the administered vaccinations will appear, followed by the un-administered vaccinations. Contact your System Administrator for additional information.

To view all of a patient's vaccinations, perform the following steps:

1. From the **PATIENT** menu, point and click **SEARCH (/ADD).**
2. Perform a Patient Search.
3. Point and click the **SELECT ARROW** to select the desired patient whose vaccinations you want to view. The "Patient Demographics" window appears.
4. Click the **VACCINATION VIEW/ADD** menu option. The patient's "View/Add Vaccination" window appears with the patient's demographic information at the top of the window.

Figure 12-1: Vaccination View/Add

Vaccines listed at the top of the Vaccine List are known as Short Cuts.

For vaccines not in the Short Cut list, there are three drop-down menus to choose them from.

Print Page

Vaccination View/Add

(historicals marked by *, adverse reaction marked by #, unverified historicals marked by +)

Facility where vaccinations documented: --select--

Double-click in any date field below to enter the default date: 09/22/2005

Vaccine	1	2	3	4	5
DTaP	03/01/2001	05/01/2001	07/01/2001	01/01/2002	
IPV	05/05/2001 *				
Hib--unspecified	03/01/2001 *	05/01/2001 *	07/01/2001 *		
Hep B Ped/Adol - Preserv Free	01/01/2001 *				
Pneumococcal(PCV7)	03/01/2001 *	05/01/2001 *	07/01/2001 *		
MMR	01/01/2002 *				
Varicella	01/01/2002 *				
Polio - unspecified	03/01/2001 *				
Td (Adult)					
Hep B/Hib					
Meningococcal Conjugate (MCV4)					
--select--					
--select--					
--select--					

Do not take ownership when adding vaccinations.

Add Administered | Clear | Add Historicals

- Vaccinations outside the ACIP schedule are marked with an 'x'.
- If a combination vaccine is marked with a 'x', please verify which components of the vaccine are outside the ACIP schedule by viewing the Vaccination Summary.
- Vaccinations administered or recorded in your facility are displayed in **blue**.
- Compromised vaccinations are highlighted in yellow.

Add Smallpox History | Contraindications | Deferrals

Allergies

Comments

Vaccination Forecast

The forecast automatically switches to the accelerated schedule when a patient is behind schedule.

Vaccine Family	Dose	Recommended Date	Minimum Valid Date	Status
HEP-B 3 DOSE**	2	02/01/2001	01/29/2001	Past Due
FLU	1	07/01/2001	07/01/2001	Past Due
POLIO	3	07/05/2001	06/02/2001	Past Due
HIB	4	01/01/2002	01/01/2002	Past Due
PNEUMO (PCV7)	4	01/01/2002	01/01/2002	Past Due
DTaP/DT/Td*	5	01/01/2005	01/01/2005	Due Now
MMR	2	01/01/2005	01/01/2005	Due Now
HEP-B 2 DOSE**	1	01/01/2012	01/01/2012	Up to Date
MENINGOCOCCAL	1	01/01/2012	01/01/2012	Up to Date

* DTaP or DT should be given to patients under 7 years old. Td should be given to patients 7 years old or older.
** If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.

Due Now -- As of today's date, the patient's age falls between the recommended minimum age and the recommended maximum age for this dose and the absolute minimum interval has been met since the last dose.
Past Due -- As of today's date, the recommended maximum age or the recommended maximum date for this dose has passed.
Up to Date -- As of today's date, the patient is not due or past due.

Note: Depending on your user access and permissions, you may not see all of the buttons shown in the above illustration.

5. Refer to the table for an explanation of the fields and their descriptions.

Table 12-1: Vaccination View/Add Fields

FIELD	DESCRIPTION
PATIENT DEMOGRAPHICS	
NAME	Name of patient whose vaccinations you are viewing.
DATE OF BIRTH	Patient's date of birth.
GUARDIAN	Name of patient's guardian.
SIIS PATIENT ID	State Immunization Information System Patient Identification number.
AGE	Age of the patient in weeks, months, and years.
STATUS	Status of the patient. Inactive, Moved out of state, etc.
VACCINATION VIEW/ADD	
FACILITY WHERE VACCINES DOCUMENTED	Name of the Facility where the shot administration took place. Click on the drop-down arrow for a list of valid choices. If a Facility Display (Abbreviated) Name was entered, it will appear in the list as opposed to the full name of the facility.
DOUBLE-CLICK IN ANY DATE FIELD BELOW TO ENTER THE DEFAULT DATE (TODAY'S DATE)	Today's date will display as the default. This date can be changed and will be saved throughout the duration of the active session.
VACCINE NAME	Name of the vaccine. This field cannot be edited. Located to the right is the Date/Dose number field.

FIELD	DESCRIPTION
	If a patient has a history of varicella reported, the word “History” will appear in the first cell in the “Varicella” row of the shot grid. In addition, the “history of chickenpox” notification will be turned on at the top of the shot grid, replacing the current contraindication message in the case of the patient having a history of varicella. If you attempt to give a patient an administered shot of an “unspecified” vaccine type, a warning message appears at the top of the window. You are required to do one of the following: • Cancel this vaccine type and choose a specific "administered" type. • Mark the vaccination as historical versus administered. • Click the checkbox to "ignore warning and add the unspecified vaccinations."
DATE / DOSE ADMINISTERED	Date and Dose Number of the shot given. **Note**: More than one vaccination from the same vaccine family cannot be entered on the same date. A **YELLOW** date indicates a Compromised vaccine. A **BLUE** date indicates the vaccine was administered or recorded at the user's facility. If you are an IRMS user and don't have any facilities defined, and the blue date indicates that the user's IRMS and SHOT match. A **(Red) X** to the left of the date indicates the vaccine was given outside the ACIP schedule. View the Vaccination Summary for details. **Note**: If a combination vaccine is marked with a red X, please verify which

FIELD	DESCRIPTION
	components of the vaccine are outside the ACIP schedule by viewing the Vaccination Summary. **Asterisk** * to the right of the date indicates a shot that was not administered on the date it was entered. This denotes a "historical" vaccination. **Pound sign #** to the right of the date indicates an adverse reaction occurred. **History** to the right of the Varicella vaccine, indicates the patient has a history of varicella. In addition, the "history of chickenpox" notification will be turned on at the top of the shot grid, replacing the current contraindication message in the case of the patient having a history of varicella.
DO NOT TAKE OWNERSHIP WHEN ADDING VACCINATIONS (CHECKBOX)	When this checkbox is checked, it prevents the IRMS from taking ownership of the patient record. A text message will appear at the top of the Vaccination Detail window when administering shots notifying the user that upon saving this vaccination(s), ownership will not be taken by the IRMS. Ownership remains with the previous owning IRMS and is not changed to the IRMS making the edit or adding the shot(s). • If the user account does not allow changes to be made to records, or the IRMS is blocked from ownership, then the checkbox will not appear. • If the IRMS that the user is logged in as already owns this patient, then the checkbox will not appear
ALLERGIES	
If the patient has any allergies, they will be listed in this area.	
COMMENTS	

FIELD	DESCRIPTION
If there is any other pertinent information about the patient or vaccinations, they will be listed here.	
VACCINATION FORECAST	
VACCINE FAMILY **STATUS**	Vaccine name of the shots that will be due for a specific patient.
DOSE	Dose Number for the Vaccine shot.
RECOMMENDED DATE	Recommended date for the Shot. **Note**: For states that want to forecast for HepA, a database setting has been added to do so; otherwise, forecasting behaves as usual.
MINIMUM VALID DATE	Earliest date of validity for the shot.
STATUS	Status of the shot. Examples are: • **Due Now** – As of today's date, the patient's age falls between the recommended minimum age and the recommended maximum age for this dose and the absolute minimum interval has been met since the last dose. • **Past Due** – As of today's date, the recommended maximum age or the recommended maximum date for this dose has passed. • **Up to Date** – As of today's date, the patient is not due or past due.

6. Determine the action you want to perform by typing text in the DATE field or by clicking on one of the available buttons. The field(s) and buttons are:

- Erase all newly typed data from the data fields by clicking the **CLEAR** button.
- Set a **DEFAULT DATE** by typing in the date you want to use for the duration of your active login session.

- View **VACCINATION DETAILS** by clicking on an existing date/dose field.
- Add an **ADMINISTERED** Vaccination by clicking on the button. The "Vaccination Detail – Add" window appears.
- Add **HISTORICAL** vaccination information by clicking on the button after typing the historical date.
- Add **SMALLPOX HISTORY** (prior to 1990) by clicking on the button. The "Previous Vaccination Smallpox – Add" window appears.
- Add a Vaccine **CONTRAINDICATION** by clicking on the button. The "Vaccine Contraindications – Add" window appears. The button will turn red when a contraindication has been added.
- Add **DEFERRALS** by clicking on the button. The "Vaccine Deferrals" window appears.
- Print the display by clicking the **PRINT PAGE** hyperlink. This is configurable by the state. When the patient has more than 10 vaccines, the vaccines will wrap so they all appear on the report.
- Add **CHICKENPOX HISTORY/REMOVE CHICKENPOX HISTORY**. This is configurable by the state and is used to record whether the patient has had the chickenpox disease.

7. Continue to the respective section for instructions.

VIEWING DETAILS ABOUT A VACCINATION

Your user access determines whether you can edit or delete vaccine information, so you may not see the same edit and delete buttons at the bottom of the window.

1. Point and click in a **DATE/DOSE** field of the vaccination you want to view. The "Vaccination Detail" window appears.

Figure 12-2: Vaccination Detail

Patient			
Name:	JOHN SMITH	SIIS Patient ID:	3
Date of Birth:	01/01/1930	Age:	75 yrs
Guardian:	MARY	Status:	Active

Vaccination Detail	
Vaccine:	Td (Adult)
Date Administered:	06/04/2005
Invalid Vaccination:	Invalid DTaP/DT/Td*: Minimum interval from previous dose not met.
Historical:	No
Manufacturer:	
Lot Number:	
Lot Facility:	
Publicly Supplied:	No
Vaccinator:	
IRMS:	1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Facility:	
Anatomical Site:	
Volume (CC):	
VFC Status:	
Adverse Reaction:	
District/Region:	
Dates of VIS Publications:	
Date VIS Form Given:	06/04/2005
Comments:	

Cancel | Edit Record | Delete Record

Add/Edit Adverse Reactions

2. The fields and their descriptions are listed in the table.

Table 12-2: Vaccination Detail Add/Edit Fields

FIELD	DESCRIPTION
VACCINE NAME	Refer to the previous table for a description.
DATE ADMINISTERED	Refer to the previous table for a description.
INVALID VACCINATION	(State configurable) Displays the reason the vaccination was invalid. **Note**: This will also display on the Vaccination Summary window.

FIELD	DESCRIPTION
HISTORICAL	HISTORICAL indicates a shot was recorded by a facility or vaccinator but didn't administer it. Click the YES radio button if it's historical; otherwise, verify the NO radio button is selected. **Note**: More than one vaccination from the same vaccine family cannot be entered on the same date if the administrator set it in the Properties file.
MANUFACTURER **LOT NUMBER** **LOT FACILITY** **PUBLICLY SUPPLIED**	These fields work together. To edit the fields, either click the "Click to select" hyperlink or click in any of the four fields. **Manufacturer** – Name of the Vaccine Manufacturer. **Lot number** – Number of the Vaccine lot **Lot Facility** – Location of the vaccine **Publicly Supplied** – Indicates whether the vaccine was publicly supplied or not (Yes or No). This is retrieved from the Lot Number information unless it is imported with a vaccination sent via batch with the Data Translation Tool. **Note**: There is a state-configurable option that prevents publicly supplied vaccine from being administered to VFC Ineligible patients. If the option is configured and a user attempts this, a warning message appears stating to either modify the VFC status or administer a private supplied vaccine. When the VFC Eligibility Update is enabled for your state and a vaccination is added or edited, the updated VFC Eligibility and Lot Publicly Supplied Status will be stored in the vaccination tables. This allows a detailed history of VFC status changes for each patient.
VACCINATOR	Name of the person giving the vaccination. Click on the drop-down arrow for a list of valid choices.
IRMS	(State configurable) This field can be suppressed whereby it can appear blank on the Patient Demographics, and Vaccination

FIELD	DESCRIPTION
	Detail windows. Number of the IRMS providing the vaccination. **Note**: When the IRMS is selected, every window containing the IRMS field will automatically populate with a default IRMS.
FACILITY	Name of the Facility where the shot administration took place. Click on the drop-down arrow for a list of valid choices. If a Facility Display (Abbreviated) Name was entered, it will appear in the list as opposed to the full name of the facility.
ANATOMICAL SITE	Location of the injection. When adding vaccinations for DTaP, MMR, IPV, and Varicella, this field may automatically be filled in. **Note**: This is a setting that gets set in Personal Settings to allow for an (optional) "minimum and maximum age" so this field may already be filled. If this field isn't automatically filled in, you will need to click on the drop-down menu arrow to view/select a valid choice.
ADVERSE REACTION	A reaction to the vaccination given. Click on the drop-down arrow for a list of valid choices.
VFC STATUS	Vaccine for Children Status. Is either **eligible** or **ineligible**. **Note:** There is a state-configurable option that prevents publicly supplied vaccine from being administered to VFC Ineligible patients. If the option is configured and a user attempts this, a warning message appears stating to either modify the VFC status or administer a private supplied vaccine. For the vaccination to be VFC eligible, the child must be VFC eligible on the patient demographics screen and the vaccine must be publicly supplied. When the VFC Eligibility Update is enabled for your state and a vaccination is added or

FIELD	DESCRIPTION
	edited, the updated VFC Eligibility and Lot Publicly Supplied Status will be stored in the vaccination tables. This allows a detailed history of VFC status changes for each patient.
REVACCINATION REASON	This option is state configurable. When a patient is revaccinated because the prior vaccination was compromised, the "Revaccination Reason" allows the user to document the reason the vaccination was compromised. This will also be revealed on the patient's immunization history and any reports that show the patient's complete vaccination record. Also, the vaccination the revaccination replaced would not be counted in the patient's vaccination forecast.
DISTRICT/REGION	District or Region where the vaccination was administered. **Note**: When the IRMS is selected, every window containing the District field will automatically populate with a default District.
DATES OF VIS PUBLICATIONS	Publication Dates of the Vaccine Information Sheet (VIS).
DATE VIS FORM GIVEN	Date the VIS form was given to the patient.
COMMENTS	Free-form field for entering any notes regarding the vaccination.

3. Click on one of the available buttons:

- **CANCEL** – to return to the "Vaccination View/Add" window.
- **EDIT RECORD** – to edit the record by displaying the "Vaccination Detail Edit" window. Continue to the respective section.
- **DELETE RECORD** – to delete the vaccination record. Continue to the respective section.

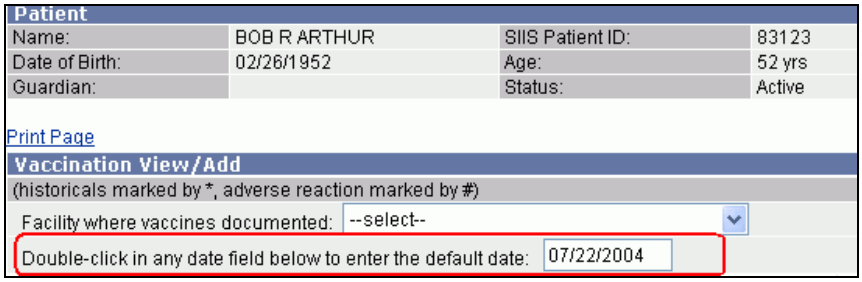
SETTING A DEFAULT DATE FOR VACCINATION ENTRIES

To set a default date, although state configurable, automatically populates the Vaccination Date while entering vaccinations, perform the following steps:

1. Locate the blank date field to the right of the field label that displays, "Double-click in any date field to enter the default date."

Note: This date cannot be a future date.

Figure 12-3: Vaccination View/Add—Set Default Date



Note: More than one vaccination from the same vaccine family cannot be entered on the same date.

2. The change is immediate; hence, if you double-click in the Date / Dose field, this date will automatically display for the duration of the session or until you logout.

ADDING AN ADMINISTERED VACCINATION RECORD

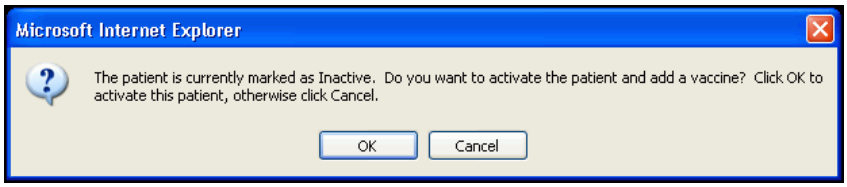
An administered vaccination is one that is given at your facility. A state configurable setting may not allow more than one vaccination from the same vaccine family cannot be entered on the same date.

Note: Although state specific, there are laws (Louisiana and Washington) that state in order for a child to get into school, a child must receive an IPV on or after their 4th birthday—regardless if they already meet the 4 IPV's according to the ACIP schedule. A 4th

dose given prior to 4 years of age should show as invalid.

When adding a vaccination and the **patient record** is "**inactive**," a pop-up window may appear (if configured by the state).

Figure 12-4: Patient is Inactive - Activate



This is a warning to let you know that the patient is inactive and prompts you asking if you want to "activate" the patient. You have the option of choosing "Yes" or "No."

- **OK** – will immediately activate the patient and displays the "Vaccination Detail Add" window.
- **CANCEL** – will not activate the patient and remains on the "Vaccination View/Add"window.

Note: There is a state-configurable option that prevents publicly supplied vaccine from being administered to VFC Ineligible patients. If the option is configured and a user attempts this, a warning message appears stating to either modify the VFC status or administer a private supplied vaccine.

To add an administered vaccination, perform the following:

1. From the **PATIENT** menu, point and click **SEARCH (/ADD).**
2. Perform a **Patient Search**.
3. Point and click the **SELECT ARROW** to select the desired patient whose vaccinations you want to view. The "Patient Demographics" window appears.
4. Click the **VACCINATION VIEW/ADD** menu option. The patient's "Vaccination View/Add" window appears.
5. Verify the **FACILITY** name is correct. Click on the drop-down arrow to view a list of choices.

6. Locate the **VACCINE NAME** and **DOSE NUMBER**.

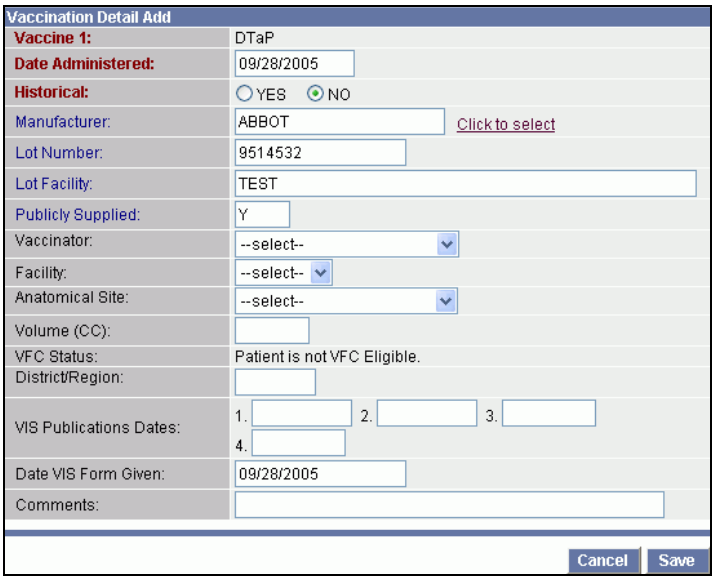
   - If you don't see it in the "shortcut" section, click on an available down-arrow for the full name at the bottom of the window.

   Note: Your System Administrator sets up the vaccine/medication shortcuts for your state.

   - Double-click in the field to enter the "default date" or type the date using the format mmddyyyy.

7. Click the **ADD ADMINISTERED** button. The "Vaccination Detail Add" window appears.

Figure 12-5: Vaccination Detail Add



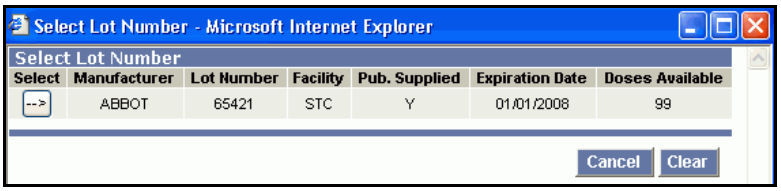
8. Some of the fields are automatically filled in from the "Vaccination View/Add" window. For a list of fields and their descriptions, refer to Table 12-2. The fields already filled in from the "Vaccination View/Add" window are:

   - Vaccine Name
   - Date Administered
   - Historical = NO
   - VFC Status
   - Date VIS Form Given (uses the "Date Administered date)

Note: When necessary, you can change the **DATE ADMINISTERED** and select **HISTORICAL** on this window.

9. For the **MANUFACTURER**, **LOT NUMBER, LOT FACILITY**, and **PUBLICLY SUPPLIED** fields, either click the "Click to Select" hyperlink or click in any of the four fields. The "Select Lot Number" window appears.

Figure 12-6: Select Lot Number



- Click the **SELECT ARROW** by the desired **LOT**. Your selection data will automatically populate the **MANUFACTURER, LOT NUMBER**, **LOT FACILITY**, and **PUBLICLY SUPPLIED** fields.

10. Verify the **VACCINATOR** name is correct. Click on the drop-down arrow to view a list of valid choices.

11. Click the drop-down arrow to choose a **FACILITY** (name of the facility that administered the shot).

12. In the **ANATOMICAL SITE** field, it may already be filled in if this field was set to automatically fill via the Personal Settings option. If the field isn't automatically filled in, click the drop-down arrow to choose the **ANATOMICAL SITE**.

Note: This is a setting that is set in Personal Settings to allow for an (optional) "minimum and maximum age." This field may already be filled in.

13. If desired, type the **DISTRICT/REGION** number.

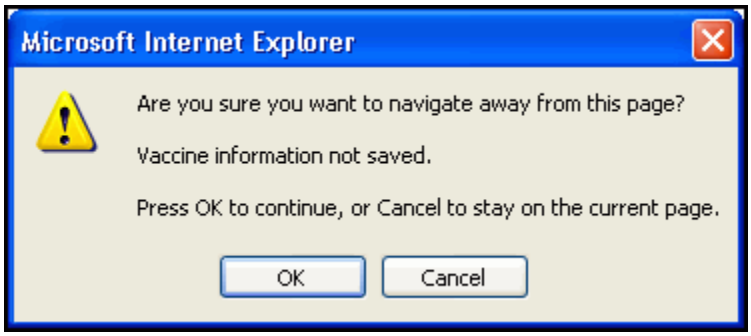
14. If desired, type any **COMMENTS** regarding the **vaccine**.

15. Click on one of the available buttons:

- **SAVE** – to save your new entries and return to the "Vaccination View/Add" window.

a) A state configurable option can be set to display an error message if you attempt to add a vaccination and leave the window without saving.

Figure 12-7: Vaccine Information Not Saved



b) Click **OK** to cancel the vaccine administration and display the chosen menu/option. Click **CANCEL** to stay on the current page to SAVE the data.

- **CANCEL** – to NOT save and return to the "Vaccination View/Add" window.

EDITING A VACCINATION RECORD

Your user access determines whether you can edit or delete vaccination information, so you may not see the same edit and delete buttons at the bottom of the window.

Note: Only the vaccinations administered within your IRMS can be edited or deleted.

1. From the "Vaccination Detail" window, press the **EDIT RECORD** button. The "Vaccination Detail Edit" window appears.

Figure 12-8: Vaccination Detail Edit

Patient			
Name:	JOHN DOE	SIIS Patient ID:	1
Date of Birth:	01/01/2001	Age:	226 weeks, 52 months, 4 yrs
Guardian:	MARY	Status:	Active

Vaccination Detail Edit	
Vaccine:	Pneumococcal(PCV7)
Date Administered:	07/01/2001
Historical:	Yes No
Manufacturer:	Click to select
Lot Number:	
Lot Facility:	
Publicly Supplied:	
Vaccinator:	--select--
Facility:	--select--
Anatomical Site:	--select--
Volume (CC):	
VFC Status:	Patient is not VFC Eligible.
District/Region:	
VIS Publications Dates:	1. 2. 3. 4.
Date VIS Form Given:	
Comments:	

Cancel | Reset Values | Submit Changes

2. Refer Table 12-2 for a list of fields and descriptions.
3. Make the necessary changes and press one of the buttons:
   - **SUBMIT CHANGES** to save editing changes and return to the "Vaccination Detail" window.
   - **CANCEL** to NOT save and return to the "Vaccination View/Add" window.
   - **RESET VALUES** to erase your newly entered data from the fields and drop-down menus, redisplay the window how it was previously, and remain on the same window.

DELETING A VACCINATION RECORD

If your user access level allows you to edit and delete vaccination information, there will be two buttons at the bottom of the window.

When deleting vaccinations, the application will not use the facility listed on the vaccination to determine ownership—the user's facility will be used. If a facility does not exist, the vaccinating facility listed in the Personal Settings will be used. If the facility is not set up as a default in Personal Settings, then a pop-up box of

facilities will appear and ask you to select the "deleting facility." This ensures that the patient ownership remains the same if vaccinations from a different facility are deleted.

Note: Only the vaccinations (administered and historical) of the IRMS that entered them can be edited or deleted.

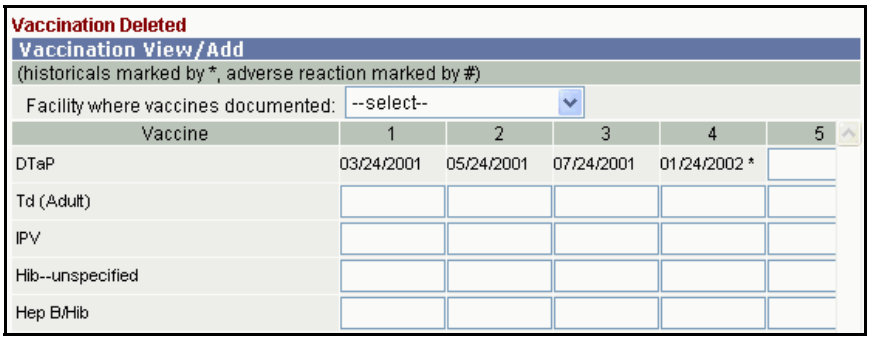
Once a vaccination record has been deleted, you cannot un-delete.

1. From the "Vaccination View/Add" window, point and click on the vaccine of the **Vaccination Date** you want to delete. The "Vaccination Detail" window appears.
2. Point and click the **DELETE RECORD** button. A warning message appears at the bottom of the window, and a new field, "**Deleting Facility**" appears.

Figure 12-9: Vaccination Detail – Delete Record – Warning Message

3. Point and click the drop-down arrow to select the **DELETING FACILITY** and click the **DELETE RECORD** button again. The "Vaccination View/Add" window reappears with a confirmation message (at the top of the window) that the Vaccination was deleted.

Figure 12-10: Vaccination View/Add – Vaccination Deleted



ADDING HISTORICAL VACCINATIONS

Historical shots are shots that are not administered by the facility or vaccinator entering the vaccination information.

More than one vaccination from the same vaccine family cannot be entered on the same date. If you attempt to do so, an error message appears.

To add a historical vaccination, perform the following:

1. From the **PATIENT** menu, point and click **SEARCH (/ADD)** and perform a **Patient Search**.
2. Point and click the **SELECT ARROW** to select the desired patient whose vaccinations you want to view. The "Patient Demographics" window appears.
3. Click the **VACCINATION VIEW/ADD** menu option. The patient's "Vaccination View/Add" window appears.
4. Verify the **FACILITY** name is correct. Click on the drop-down arrow to view a list of valid choices.
5. Locate the **VACCINE NAME** and **DOSE NUMBER**. If you don't see it in the "short cut" section, click on an available down-arrow for the full name at the bottom of the window.
6. Double-click the field to insert the "Default Date" or type the date using the format mmddyyyy.
7. Click the **ADD HISTORICAL** button. The vaccination data is entered and you remain on the "Vaccination View/Add" window.

ADDING SMALLPOX VACCINATION HISTORY

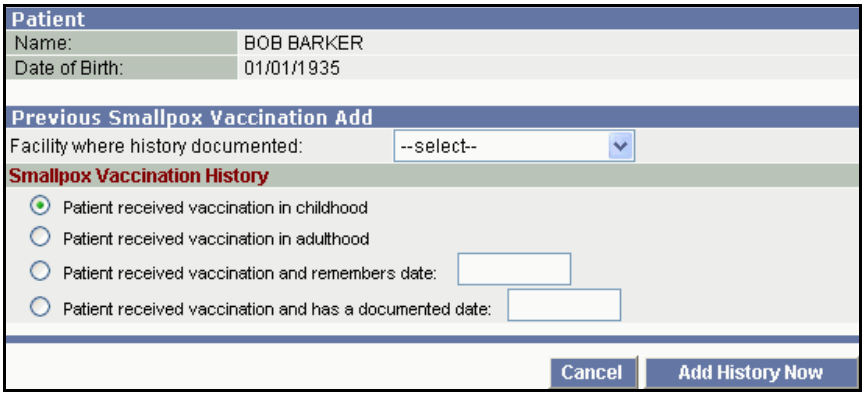
To add smallpox vaccination history, perform the following:

1. From the **PATIENT** menu, point and click **SEARCH (/ADD)** and perform a **Patient Search**.
2. Point and click the **SELECT ARROW** to select the desired patient whose vaccinations you want to view. The "Patient Demographics" window appears.
3. Click the **VACCINATION VIEW/ADD** menu option. The patient's "Vaccination View/Add" window appears.

   Note: If the patient was born in 1990 or later, the **SMALLPOX HISTORY** button will be disabled on the "Vaccination View/Add" window.

4. Click on the **ADD SMALLPOX HISTORY** button. The "Smallpox Vaccination History" window appears.

Figure 12-11: Smallpox Vaccination Add



5. Click the drop-down arrow and select the facility for the **FACILITY WHERE HISTORY DOCUMENTED** field.

6. Click one of the following radio buttons:

- **Patient received vaccination in childhood** – doesn't have a date.

Note: Since there isn't a date, the date of vaccination will show as "unknown" on the vaccination windows and in the reports.

- **Patient received vaccination in adulthood** – doesn't have a date.

Note: When there isn't a date, the date of vaccination will show as "unknown" on the vaccination windows and in the reports.

- **Patient received vaccination and remembers date** – type the date using the MM/DD/YYYY format.
- **Patient received vaccination and has a documented date** – type the date using the MM/DD/YYYY format.

7. Click one of the available buttons:

- **ADD HISTORY NOW** button to save the entry.
- **CANCEL** to NOT add the History.

8. The "Vaccination View/Add" window reappears.

ADDING CONTRAINDICATIONS

In some states such as Idaho, contraindication recording is not available because it is considered a "violation of privacy." To prevent patients who "opt-out" of a specific vaccine from being forecasted and showing up on the Reminder Recall list, on the "Contraindication" window, the message "Parent or Patient Refusal: Personal" or "Laboratory Evidence of Immunity" will appear versus the actual Contraindication text.

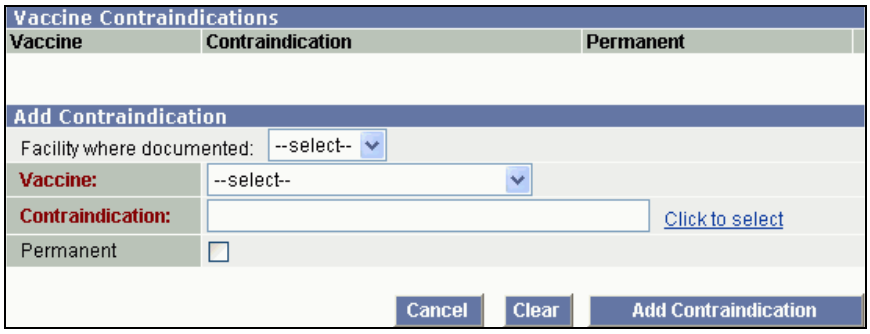
Note: A patient's forecast will update immediately when adding or deleting contraindications.

When adding contraindications, the chosen vaccine determines the valid reasons that will display.

In addition, CASA assesses coverage levels only. Permanent contraindications and refusals will be assessed as "incomplete coverage" for the specific antigen.

1. From the **PATIENT** menu, point and click **SEARCH (/ADD).**
2. Perform a Patient Search.
3. Point and click the **SELECT ARROW** to select the desired patient whose vaccinations you want to view. The "Patient Demographics" window appears.
4. Click the **VACCINATION VIEW/ADD** menu option. The patient's "View/Add Vaccination" window appears.
5. Click on the **ADD CONTRAINDICATIONS** button. The "Add Contraindication" window appears.

Figure 12-12: Add Contraindication



Note: If there are other Vaccine Contraindications, they will be listed at the top of the window.

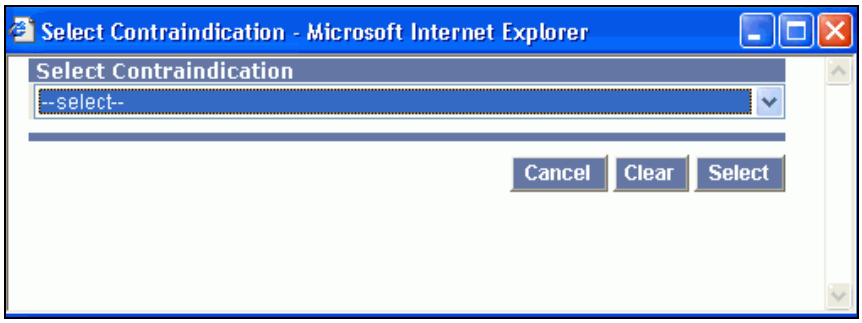
6. Point and click on the drop-down arrow to select **FACILITY**, if necessary.

7. Click on the drop-down arrow to view a list of **VACCINES** and select the vaccine.

Note: Different contraindication reasons display per vaccine chosen.

8. Click the "**Click to Select**" hyperlink or click in the Contraindication field to display the dialog box.

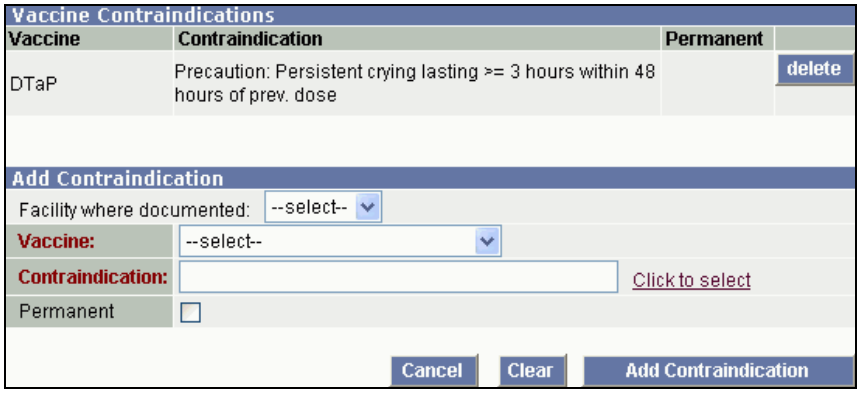
Figure 12-13: Select Contraindication



9. On the "Select Contraindication" window, click on the drop-down menu to view a list of valid choices, click on one to highlight it, and then press one the buttons:

- **SELECT** – to select the contraindication and return to the "Add Contraindication" window with your added contraindication.

Figure 12-14: Vaccine Contraindication Added



Note: Once the contraindication is at the top of the window, you have the opportunity to delete it by pressing the corresponding **DELETE** button.

- **CANCEL** – to NOT make a selection.
- **CLEAR** – to reset and NOT make a selection. Regardless of the button clicked, the "Add Contraindication" window reappears.

10. Click the **PERMANENT** checkbox if the contraindication is to be kept permanently.

Note: If a contraindication is marked permanent, the vaccine will no longer be included in the patient's forecast.

11. Click on one of the buttons:

- **CLEAR** to erase any newly selected/entered text and remain on the window.
- **ADD CONTRAINDICATION** button to add another contraindication.
- **CANCEL** to return to the "Vaccination View/Add" window.

Figure 12-15: Vaccination View/Add with displayed Contraindication

Vaccination View/Add

This patient has one or more contraindications.

(historicals marked by *, adverse reaction marked by #)

Facility where vaccines documented: --select--

Vaccine	1	2	3	4	5
DTaP	03/24/2001	05/24/2001	07/24/2001	01/24/2002 *	
Td (Adult)					
IPV					
Hib--unspecified					
Hep B/Hib					
Hep B Ped/Adol - Preserv Free					
Pneumococcal(PCV7)					
MMR					
Varicella					
--select--					
--select--					
--select--					

Double-click in any date field above to enter the default date: 03/26/2004

Vaccinations outside the ACIP schedule are marked with an 'X'.
Vaccinations administered or recorded in your facility are displayed in **blue**.

Add Administered | Add Smallpox History | Add Historicals

Clear All | Contraindications

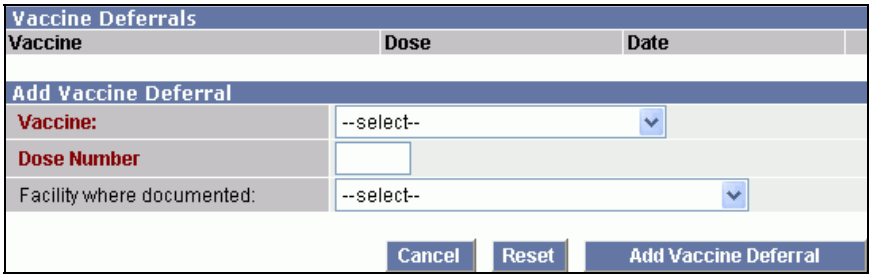
ADDING A VACCINE DEFERRAL

This option is accessed from the "Vaccination View/Add" window by clicking the **DEFERRALS** button. Adding a Vaccine Deferral will impact Reminder Recall. If a patient is not forecasted to receive the vaccine, they will not get a reminder recall for it. A report is available to retrieve all deferrals.

Note: If the patient receives an administered vaccination in the family of the shot that was deferred, the deferral is automatically removed. If an administered vaccination matches a historical vaccination, the deferral is left in place.

1. From the "Vaccination View/Add" window, click the **DEFFERALS** button. The "Vaccine Deferrals" window appears.

Figure 12-16: Vaccine Deferrals



2. In the **VACCINE** field, click the drop-down menu arrow to view/select a valid choice. This is a required entry.
3. In the **DOSE NUMBER** field, type the dose number. This is a required entry.
4. In the **FACILITY WHERE DOCUMENTED** field, click the drop-down menu arrow to select the Facility.
5. Click one of the available buttons:
   - **ADD VACCINE DEFFERAL** – to add the deferral. A red confirmation message appears at the top of the window and the vaccine will also be copied to the top of the Window.
   - **CANCEL** – to not save the deferral and exit to the "Vaccination View/Add" window.
   - **RESET** – to erase any selected/typed data and remain on the window to enter new selections.
   - **DELETE** – only appears when a vaccine deferral exists. Locate the deferral you want to delete and click the **DELETE** button located to the right on the same row. A red confirmation message appears at the top of the window.

ADDING/REMOVING CHICKENPOX HISTORY

This button is an option and is state configurable. It is used to record whether the patient has had the chickenpox disease. Once the patient has had the chickenpox, the Varicella vaccination will not get forecasted. A new vaccination code "ChickenPox – Had Disease" will also appear.

When configured and the **ADD** button has been pressed, the message, "The patient was reported to have had the chickenpox

disease" appears directly under the "Vaccination View/Add" window's title bar. Once added, the **REMOVE CHICKENPOX HISTORY** button appears.

This option of having this information be public versus private is also state configurable.

VACCINATION FORECAST

The **Vaccination Forecast** option is used to view the shots that will be due for a specific patient (including invalid doses), their recommended dates, and their status. An example of an invalid dose is as follows: If there is a 6-month interval between DtaP doses 4 and 5, and dose 5 is given too early, it is counted as invalid. The forecasting would still show the recommended date for dose 5 as 6 months from Dose 4. The recommended date should show Dose 5 recommended 6 months from the invalid dose 5.

Note: Optionally, your state may choose to setup the configuration where the forecast procedure may suppress Dose 1 for HepA. This is done within the actual database.

A state configurable option can be set to NOT forecast a specific vaccine unless the first dose has been given.

Forecasting will reflect the following situations and are illustrated in the following table:

- If a patient received single antigens of Measles, Mumps and Rubella, the forecast does not show them in need of another MMR.
- If they do not receive all 3 components of the vaccine, they should still be recalled for an MMR or if they are due for a 2nd MMR, they should still be recalled for an MMR.
- If a patient receives the single antigen vaccines, they should appear on the Universal Certificate and the Vaccination Summary, Vaccination View/Add screen print, Patient Record Summary, and Patient Record.

Table 12-3: Forecasting Recall Examples

VACCINATIONS	FORECAST					NOTES
	MMR1	MMR2	MEASLES2	MUMPS2	RUBELLA2	
NO VACCINATIONS	X					Single antigens are not forecasted until the patient receives the first dose of a single antigen.
MMR1	X					Single antigens are not forecasted until the patient receives the first dose of a single antigen.
MEASLES1	X		X			Mumps and Rubella are not displayed since the patient has not received any of those antigens.
MEASLES 2	X					The Measles is complete so it no longer shows in the forecasting. However, MMR #1 is still not satisfied so it remains in forecasting. Mumps and Rubella are not displayed since the patient has not yet received any of those antigens.
MEASLES 1, MUMPS 1, RUBELLA 1		X	X	X	X	
MEASLES 1, MUMPS 1, RUBELLA 1, MMR1						All of the intervals for two doses can be met, then the MMR series is complete and all of the vaccines are removed from forecasting.

The vaccinations chosen in the **SETTINGS | FORECAST** option, determines the vaccines that will display in the patient's forecast. This is a global setting and the same vaccinations will display for every patient.

There are two types of schedules—regular and accelerated. Based on the patient's existing vaccinations, the application will automatically switch between the schedules to get the child up to date, as recommended by the CDC.

Note: Although state specific, there are laws (Louisiana and Washington) that state in order for a child to get into school, a child must receive an IPV on or after their 4th birthday—regardless if they already meet the 4 IPV's according to the ACIP schedule. A 4th dose given prior to 4 years of age should show as invalid.

1. From the **PATIENT** menu, point and click **SEARCH (/ADD)** and perform a **Patient Search**.
2. Point and click the **SELECT ARROW** to select the desired patient whose vaccinations you want to view. The "Patient Demographics" window appears.
3. Click the **VACCINATION FORECAST** menu option. The patient's "Vaccination Forecast" window appears.

Figure 12-17: Vaccination Forecast

Patient

Name:	JOHN DOE	SIIS Patient ID:	3
Date of Birth:	06/03/1960	Age:	44 yrs
Guardian:	MARY	Status:	Active

Vaccination Forecast

The forecast automatically switches to the accelerated schedule when a patient is behind schedule.

Vaccine Family	Dose	Recommended Date	Minimum Valid Date	Status
HEP-B 3 DOSE**	1	06/03/1960	06/03/1960	Past Due
DTaP/DT/Td*	1	08/03/1960	07/15/1960	Past Due
POLIO	1	08/03/1960	07/15/1960	Past Due
FLU	1	12/03/1960	12/03/1960	Past Due
MMR	1	06/03/1961	06/03/1961	Past Due
VARICELLA	1	06/03/1961	06/03/1961	Past Due
HEP-A	1	06/03/1962	06/03/1962	Past Due
MENINGOCOCCAL	1	06/03/1971	06/03/1971	Past Due

* DTaP or DT should be given to patients under 7 years old. Td should be given to patients 7 years old or older.
** If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.

Due Now -- As of today's date, the patient's age falls between the recommended minimum age and the recommended maximum age for this dose and the absolute minimum interval has been met since the last dose.
Past Due -- As of today's date, the recommended maximum age or the recommended maximum date for this dose has passed.
Up to Date -- As of today's date, the patient is not due or past due.

Note: If a contraindication is marked permanent, the vaccine will no longer be included in the patient's forecast.

VACCINATION SUMMARY

The **Vaccination Summary** option groups vaccinations by vaccine family and is used to view the vaccination series or single antigens of Measles, Mumps, and Rubella completion. An example of a series is DTaP/DTP/DT/Td.

Note: All childhood vaccines will display on the Vaccination Summary.

If a patient receives the single antigen vaccines, they will appear in various places, such as the Universal Certificate and the Vaccination Summary, Vaccination View/Add screen print, Patient Record Summary and Patient Record.

It can also be used as a printable report for a patient's vaccinations.

Note: As a state configurable option, the Forecast could display on this window. Refer to the previous section for an explanation regarding Forecast information. Additionally, Vaccine Deferrals and Contraindications could display on this window and are state configurable.

1. From the **PATIENT** menu, point and click **SEARCH (/ADD)** and perform a **Patient Search**.
2. Point and click the **SELECT ARROW** to select the desired patient whose vaccinations you want to view. The "Patient Demographics" window appears.
3. Click the **VACCINATION SUMMARY** menu option. The patient's "Vaccination Summary" window appears.

Figure 12-18: Vaccination Summary

Patient

Name:	JOHN DOE	SIIS Patient ID:	1
Date of Birth:	01/01/2001	Age:	247 weeks, 56 months, 4 yrs
Guardian:	MARY	Status:	Active

Vaccination Summary

Does not include all vaccination types.

Vaccinations outside the ACIP schedule are marked with an 'X'.

Vaccine Family	1	2	3	4	5	6	7	8
DTaP/DTP/DT/Td	03/01/2001	05/01/2001	07/01/2001	01/01/2002				
OPV/IPV	03/01/2001							
MMR	01/01/2002							
Hib	03/01/2001	05/01/2001	07/01/2001					
Hep B - 3 Dose	01/01/2001							
Varicella	01/01/2002							
Pneumo (PCV7)	03/01/2001	05/01/2001	07/01/2001					

Vaccine Deferrals

Vaccine	Dose	Date

Vaccine Contraindications

Vaccine	Contraindication	Permanent	Unverified

Note: A “state configurable” option is available that allows the “Invalid Vaccination Reason(s)” to display on the Vaccination Detail and Vaccination Summary windows.

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13 CASA EXPORT

The **CASA Export** menu is used to conduct immunization assessments by exporting a file that will be used by a Windows version of the Clinic Assessment Software Application (WinCASA). WinCASA, also referred to a CASA, is a separate software package that has been developed by the Centers for Disease Control and Prevention to assess immunization coverage rates in a standard manner.

Providers are to conduct semi-annual audits (stated by the Standards for Pediatric Immunization Practices) to assess immunization coverage levels and review immunization records in the patient populations they serve. In both public and private sectors, the assessment of immunization services for pre-school age patients should include audits of immunization records, or inspection of a random sample of records to determine the immunization coverage level. The assessment results should be discussed by providers as part of their ongoing quality assurance reviews, and be used to develop solutions to the problems identified.

The primary purpose of **CASA** is to help providers implement this recommended practice. CASA can also be used to collect information on all clinical encounters in order to assess if providers utilize all clinical encounters to screen for needed vaccines and when indicated, immunize children.

PERFORMING THE CASA EXPORT

Exporting **CASA** data requires two steps. The first step is using the IWEB application to retrieve the data and place it into a text file in alphabetical order. The second step is running the CASA application to import the data file.

Exports will export all of the vaccine types, dose numbers, and chickenpox history accepted into CASA. The CASA template for CDC's CASA software has been modified and submitted to the CDC for inclusion in their distribution of CASA software.

The IWeb Casa Export includes VFC Eligibility and thus, the Import Template includes VFC Eligibility.

Version 3.0 includes exporting chickenpox history to CASA.

Note: Vaccinations for patients who "opt out" or are exempt from the registry, will be included in the central registry for inventory and CASA purposes.

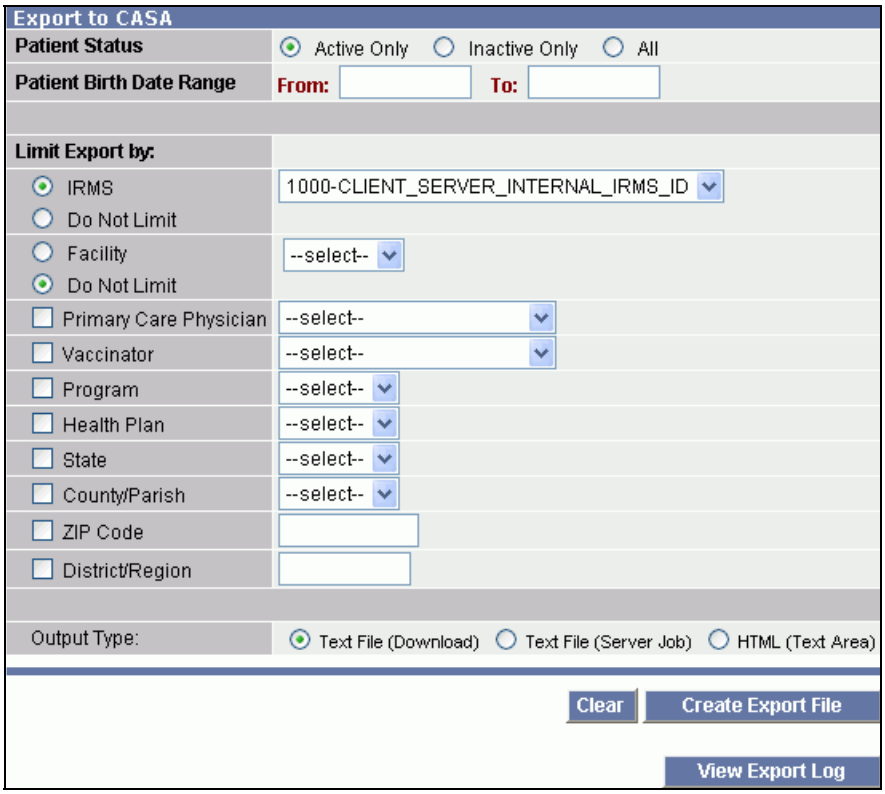
STEP 1 (IWEB APPLICATION): RETRIEVING DATA

To retrieve the export data, perform the following:

1. Point and click on the **CASA Export** menu. The "Export to CASA" window appears.

Note: Your user access determines the options you will see on this window.

Figure 13-1: Export to CASA



2. The fields and their descriptions are listed in the table.

Table 13-1: Casa Export Fields

FIELD	DESCRIPTION
PATIENT STATUS	Status of the patient. Statuses are: • **ACTIVE ONLY** – selects only patients that are active in the application. • **INACTIVE ONLY** – select only those patients that have been inactivated in the application. • **ALL** – selects active and inactive patients.
PATIENT BIRTH DATE RANGE	Type the **BIRTH DATE RANGE** for the patients to include. Type the dates in the **MM/DD/YYYY** format. You must enter a FROM and TO date.
LIMIT EXPORTS BY	To limit the amount of data to export, use the drop-down arrows, radio buttons, or type text into the fields.
IRMS / DO NOT LIMIT	To export a specific IRMS, select the IRMS using the drop-down arrow; otherwise, select the Do Not Limit radio button to export all IRMSs.
FACILITY / DO NOT LIMIT	If you have several facilities, you can isolate the patients that belong to a specific facility. Point and click on the drop-down arrow to view a list of facilities. Point and click on the desired Facility, and then click the FACILITY radio button; otherwise, select the Do Not Limit radio button to select all the facilities.
PRIMARY CARE PHYSICIAN	Point and click on the drop-down arrow to view a list of Physicians. Point and click on the desired PHYSICIAN. The checkbox will automatically get checked after you make a selection.
VACCINATOR	Point and click on the drop-down arrow to view a list of Vaccinators. Point and click on the desired VACCINATOR. The checkbox will automatically be checked after you make a selection.

FIELD	DESCRIPTION
PROGRAM	Point and click on the drop-down arrow to view a list of Programs. Point and click on the desired PROGRAM. The checkbox will automatically be checked after you make a selection.
HEALTH PLAN	Point and click on the drop-down arrow to view a list of Health Plans. Point and click on the desired HEALTH PLAN. The checkbox will automatically be checked after you make a selection.
STATE	Point and click on the drop-down arrow to view a list of States. Point and click on the desired STATE. The checkbox will automatically be checked after you make a selection. Select State before selecting County/Parish.
COUNTY/PARISH	Point and click on the drop-down arrow to view a list of Counties/Parishes. Point and click on the desired COUNTY/PARISH. The checkbox will automatically be checked after you make a selection. **Note**: You must select STATE before selecting COUNTY/PARISH.
ZIP CODE	Type either a 5-digit (85024) or 9-digit (85024-1234) ZIP CODE. The checkbox will automatically be checked after you begin to type.
DISTRICT/REGION	Type a whole number for the DISTRICT/REGION. The checkbox will automatically be checked after you begin to type.
OUTPUT TYPE	Select the end result for the export—this is known as OUTPUT TYPE (The number of patient and vaccination records will appear after the file has been written. Output Types are: • **Text File (Download)** – Useful to use when you are ready to export the file for importation to CASA. • **Text File (Server Job)** – Useful to use when you want to process the job in the background. When the file is ready, it can be downloaded from the CASA log window. To view JOBS that are currently

FIELD	DESCRIPTION
	waiting or being processed, refer to the chapter titled, "Job Queue." • **HTML (Text Area)** – Useful to use when you want to copy/paste into a different application, such as Microsoft Excel.

3. Click one of the available buttons:

- **CLEAR** – to erase any selections made on the window and remain on the window to re-enter selections.
- **CREATE EXPORT FILE** – to begin the export. Continue to step 4.

  a) If you chose the Output Type of Text File (Server Job), a message will appear at the top of the window.

Figure 13-2: Text File Server Job Confirmation Message

Your CASA Export has been added to the Job Queue.
Please check View Export Log to download the file when it has completed.

  b) Continue to the section titled, "Viewing the Job Queue."

- **VIEW EXPORT LOG** – to download the Text File Server Job when it has completed. Continue to the section titled, "Viewing the Export Log."

4. Point and click on the **CREATE EXPORT FILE** button. Depending on the factors entered and number of records to retrieve, this may take a few minutes.

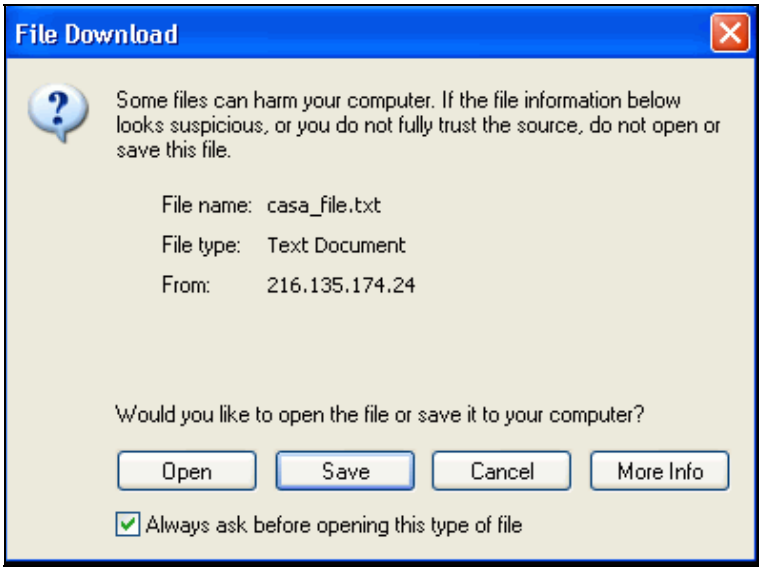
Note: Observe the message and completion indicator at the bottom of the window and wait until the indicator stops.

Figure 13-3: Status Indicator

Opening page http://216.135.174.24/webtest/casa_export_download.jsp...

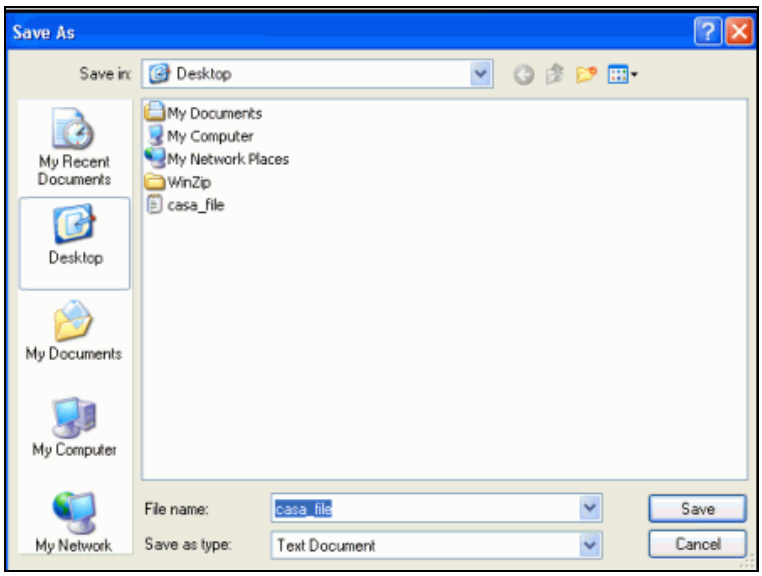
5. A "File Download" dialog window appears.

Figure 13-4: File Download Dialog Box



6. Click the **SAVE** button. The "SAVE AS" dialog box appears for you to enter a filename.

Figure 13-5: File Save As Dialog Box

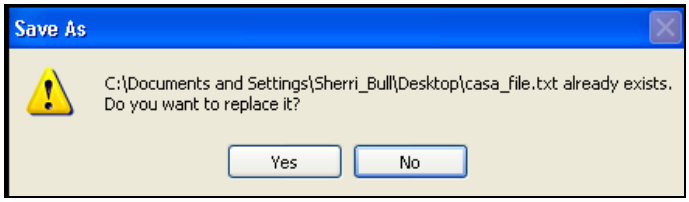


7. The default file name is "**casa_file**" and it will be saved to the **Desktop** location unless you choose a different directory location.

Note: You will need to know the file name and location when you start the CASA application program (step 2).

- You can accept this file name and location by pressing the **SAVE** button, or if you have a need to save these files, add onto the file name by typing the date and save it to a pre-defined directory; e.g., casa_file 11012001.
- If you accept the filename and location and you have saved a file to your desktop previously, you will see another dialog box.

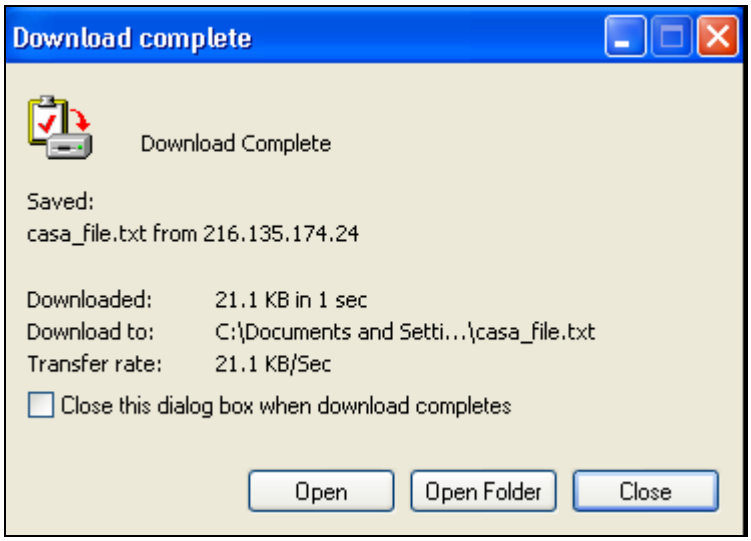
Figure 13-6: Replacement File Dialog Box



Note: Observe the directory path because you will need it for Step 2.

8. Click the **YES** button (to erase the previous file and save the new file in its place). A confirmation dialog window appears.

Figure 13-7: Download Complete Dialog Box



9. Click the **CLOSE** button.

VIEWING THE EXPORT LOG

After the data has been retrieved, the export log can be viewed, by performing the following:

1. Click the **VIEW EXPORT LOG**. The "CASA Export Log" window appears:

Figure 13-8: CASA Export Log

CASA Export Log

Export Date	From Birthday	To Birthday	Limited To	Records Sent	Export Filename
05/27/2005	01/01/2000	01/01/2005		1	(Server Job) casa-1117208337656.txt
05/27/2005	01/01/2000	01/01/2001		1	casa_file
05/27/2005	01/01/2000	01/01/2001		1	(Server Job) casa-1117208391875.txt

Back

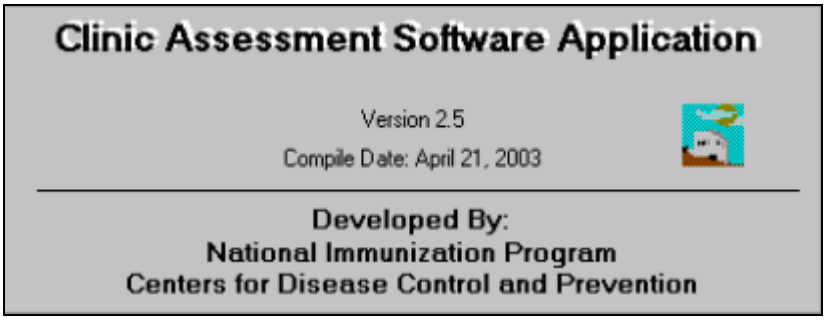
2. Click on the **EXPORT FILENAME** to view the contents of the file, or click the BACK button to return to the "Export to CASA" window.

STEP 2 (CASA APPLICATION)

These instructions import the **casa_file.txt** file into CASA.

1. Point and click the **START** button and choose the **PROGRAMS | CASA FOR WINDOWS | CASA FOR WINDOWS** options. The Clinic Assessment Software Application dialog box briefly appears.

Figure 13-9: Casa Software Welcome Window



The dialog box will disappear and then the CASA version menu appears.

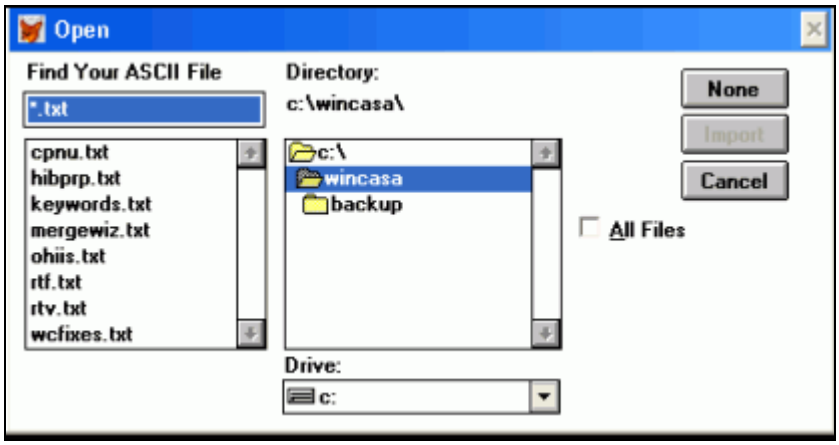
Figure 13-10: CASA Version Menu

2. Point and click on the **ASSESSMENT SITE** menu and choose the **IMPORT | IMPORT USING AN EXISTING TEMPLATE** option. The "Choose an Import Template to Import" dialog box appears.

Figure 13-11: Import Template

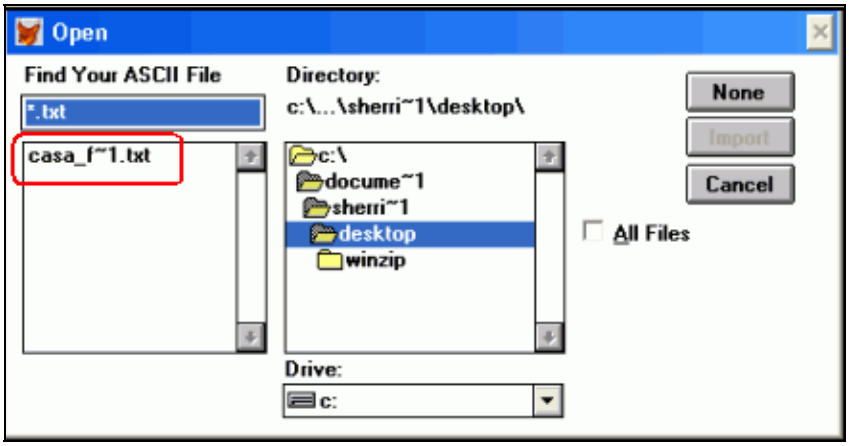
3. Type the letter **S** to immediately position the highlighter on the **STC IWEB** option, and then click the **OK** button. The "Open – Find your ASCII File" dialog box appears.

Figure 13-12: Find ASCII File



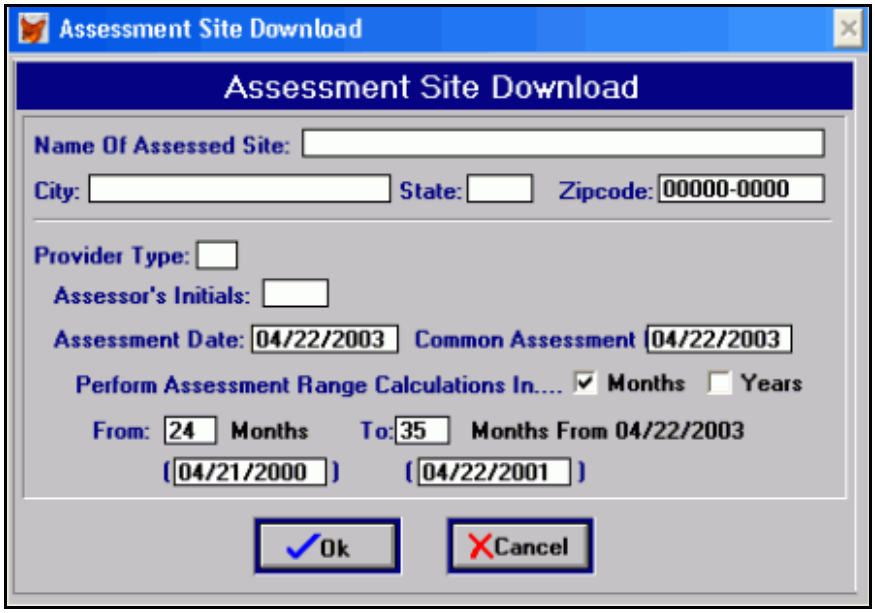
4. Traverse through the directory paths to locate your text file. For example, point and click on C:\ and then on the directory name below it (Documents & Settings), and then on the next directory (Sherri), and then on the Desktop folder, etc. until you locate your text file.

Figure 13-13: Open ASCII Text File



5. Point and double-click on the file name. For example, **casa_file.txt**. The "Assessment Site Download" window appears.

Figure 13-14: Assessment Site Download



6. In the "**Name Of Assessed Site**" field, type an identifying name; e.g., County Health Department.

- Use the **TAB** key to get to the next field.
- Once your TAB key is in the "**Provider Type**" field, a pop-up window appears with the following types:

Table 13-2: Provider Types

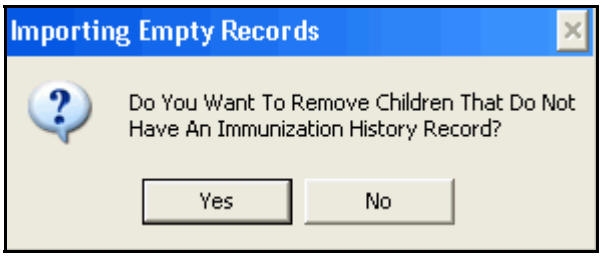
TYPE	DESCRIPTION
P	Public Health Center
C	Community Health Center
D	Daycare Site
H	Headstart Site
S	Preschool Site
W	WIC Site
I	Indian Health Service
R	Private Provider
O	HMO

- **Assessor's Initials** – must be three initials.
- **Assessment Date** – defaults to today.
- **Common Assessment** – defaults to today.
- **Perform Assessment Range Calculations In** – Point and click in either the **Months** or **Years** checkbox.
- **From / To** – If months was chosen in the "Perform Assessment Range Calculations In" section, the field will be labeled months; otherwise, years will display.

7. Verify the **From/To** Dates are accurate and change them if necessary.

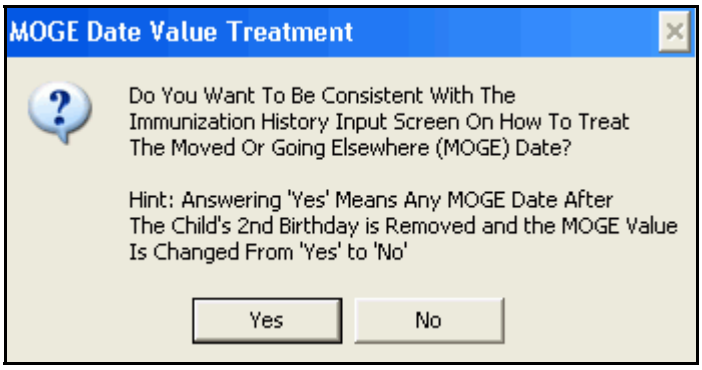
8. Click the **OK** button to continue (or click **CANCEL** to stop). An "Importing Empty Records" dialog box appears.

Figure 13-15: Importing Empty Records Dialog Box



9. Click the **YES** or **NO** button. The "MOGE Date Value Treatment" dialog box appears. MOGE is an acronym for Moved Or Going Elsewhere.

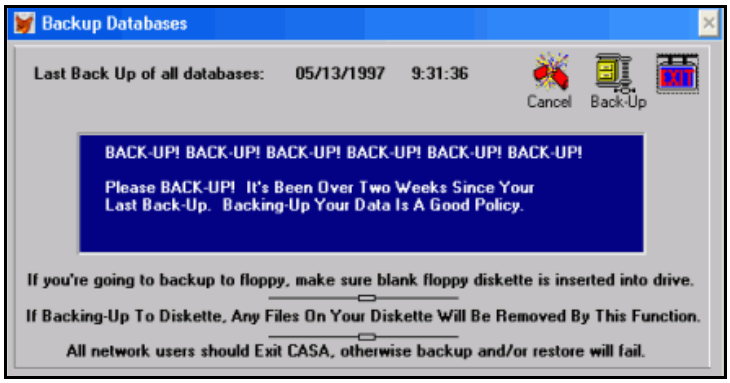
Figure 13-16: MOGE Date Value Treatment



10. Click either the **YES** or **NO** button. You are now finished with this step.

11. Exit the application by pointing and clicking on the **EXIT** menu option. A "Backup Databases" dialog reminder box appears.

Figure 13-17: Backup Databases



12. Perform one of the following:

- **Backup** – Backs up the database. If you are going to perform a **Backup**, you will need a blank

formatted diskette inserted into the drive. If the diskette isn't blank, files will be erased.

- **Cancel** – Removes the "Backup Databases" dialog box and remains in the CASA application.
- **EXIT** – Closes the CASA application.

Note: For additional information regarding the CASA application, download the user's guide from their web site. *http://www.cdc.gov/nip/casa/c_userguide.htm*

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14 REMINDER RECALL

Reminder Recall is used when you want to notify patients about upcoming or past due vaccinations. Only the patients you own will be included in the Reminder Recall results.

The result of this notification can be any of the following items:

- **Patient Listing Report** – Actual title is, "Reminder Recall Patient Recall Group Listing." This option displays/prints the report criteria, total patients selected, and all patients in order of last name.

- **Mailing Labels** – These require Avery label #5160 and prints in PDF format with three labels across and ten labels down for a total of thirty labels per sheet.

- **Auto Dialer** Phone List – This is a text file that can be saved locally or to a diskette and then sent to the company that is performing the dialing.

- **Postcards** – This is a list of continuous postcards that print on Avery 8387 card stock. Displays/prints two postcards across.

  Note: Postcards can optionally be customized by the user to accommodate different messages. These custom messages will get stored in the database. More information is available in the section titled, "Selecting the Output Types."

- **Email Reminders** – Lists the patient, guardian, and email addresses of several patients on a list providing the option to send all the emails. Remember to type the facility's return address information.

  Note: All of these items will first display in a browser window that will provide an option to print.

Each time the Reminder/Recall is generated, a running total per patient is incremented by one unless you check the box indicating, "**Not to Increment the Recall Count**." There is an additional setting labeled, "Maximum Number of Recall Tries," that holds a numerical value capping the total times a patient is reminded or recalled.

RUNNING REMINDER RECALL

To run Reminder Recall, perform the following steps:

1. Point and click on the **REMINDER RECALL** menu option. The "Reminder/Recall" limitations/selections window appears.

Figure 14-1: Reminder Recall limitations/selections

Reminder/Recall

- [ ] Do Not Increment Recall Count (Run Recall)
- [ ] Preview and Select Patients

Reminder/Recall Date Range: **From:** 01/01/1990 **To:** 11/23/2004

Maximum Recall Tries: 5

Valid Addresses:
- ○ Valid Addresses Only
- ○ Invalid Addresses Only
- ◉ All Patients

- [ ] Include Inactive Patients

Limit Reminder/Recall Group By:

[ ] Patient Birth Date	From: To:
○ IRMS	--select--
◉ Do Not Limit	
○ Facility	--select--
◉ Do Not Limit	
[ ] Physician	--select--
[ ] Program	--select--
[ ] Health Plan	--select--
[ ] High Risk Category	--select--
[ ] State	--select--
[ ] County/Parish:	--select--
[ ] Zip Code:	
[ ] Health District/Region	
[ ] Appointment Date	From: To:
[ ] Deferred Vaccinations Only	

Vaccine Families:	***and Optional Needed Dose Number:***
[x] DTaP/DT/Td*	
[x] HIB	
[x] POLIO	
[x] HEP-B 3 DOSE**	
[x] MMR	
[x] VARICELLA	
[x] HEP-A	
[x] FLU	
[x] PNEUMO (PCV7)	
[x] HEP-B 2 DOSE**	
[ ] ANTHRAX	
[ ] SMALLPOX SHOT/READING	

* DTaP or DT should be given to patients under 7 years old. Td should be given to patients 7 years old or older.
** If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.

Name of Person Running Reminder/Recall:

Clear All | Reset Values | Run Reminder Recall

2. Reference the table below for a description/explanation of the item (checkbox, radio button, etc.).

Table 14-1: Reminder Recall Fields

ITEM	DESCRIPTION
DO NOT INCREMENT RECALL COUNT (RUN RECALL)	Ordinarily when Reminder/Recall is run, a "count" gets added to the patient's record. Once the threshold (Maximum Recall Tries) is reached, the patient will no longer receive reminders/recalls. The recall count is reset for a patient once a historical or administered vaccination is entered. If you want to do a "practice" run to view the number of patients that are to be reminded/recalled, you would want to point and click this checkbox to "NOT" add a count; otherwise, leave it UNCHECKED.
PREVIEW AND SELECT PATIENTS	If you want the opportunity to preview and edit (select patients) the final list, point and click the Preview and Select Patients checkbox. The recall count does not get incremented for patients that are removed from the recall list.
REMINDER/RECALL DATE RANGE **(FROM AND TO)**	The "From" and "To" dates have defaults that can be changed. Point and click the portion of the date you want to change. The date must be entered in MM/DD/YYYY format and both fields MUST have a date. **Note**: If this is for a reminder, enter future date range; otherwise, if this is a recall, enter historic date range.
MAXIMUM RECALL TRIES	This is the total times a recall will be sent to a patient that has not responded by getting his immunization(s). A default of 5 is automatically selected. Point and click on the drop-down arrow to choose a new value, if desired. The maximum is 20.
VALID ADDRESSES	This is to select only those patients that have: • Valid Addresses Only • Invalid Addresses Only • All Patients (Valid and Invalid)

ITEM	DESCRIPTION
INCLUDE INACTIVE PATIENTS	If checked, patients that have been set as "Inactive" will be included in the generated list; otherwise, the inactive patients will not be included.
LIMIT REMINDER/RECALL GROUP BY	Allows you to place limitations on the "checked" items; thus, limiting the data that is to be retrieved. **Note**: Registry Client, IRMS Client, and Facility Client access users can use zip code, state, and county filters to limit their recalls.
PATIENT BIRTH DATE **(FROM AND TO)**	If a FROM and TO date are entered, the checkbox will automatically get checked. Only patient's whose Birth Dates are within the range will be retrieved and included.
IRMS, OR DO NOT LIMIT	As a default, the Do Not Limit radio button will be checked.
FACILITY, FACILITY GROUP, OR **DO NOT LIMIT**	As a default, the Do Not Limit radio button will be checked. If you want to generate the list by Facility or Facility Group, point and click on the drop-down menu to see a list. When you make a selection from the list, the radio button will automatically get selected. **Note**: If a Facility Display (Abbreviated) Name was entered for the facility, it will appear in the list as opposed to the full name of the facility.
PHYSICIAN	If you want to generate the list for a specific Physician, point and click on the drop-down menu to see a list of Physicians. When you make a selection from the list, the checkbox will automatically get checked.
PROGRAM	If you want to generate the list for a specific Program, point and click on the drop-down menu to see a list of Programs. When you make a selection from the list, the checkbox will automatically get checked.
HEALTH PLAN	If you want to generate the list for a specific Health Plan, point and click on the drop-down menu to see a list of Health Plans. When you make a selection from the list, the checkbox will automatically be checked.

ITEM	DESCRIPTION
HIGH RISK CATEGORY	If you want to generate the list for a specific High Risk Category, point and click on the drop-down menu to see a list. When you make a selection from the list, the checkbox will automatically be checked. **Note**: The High Risk Categories must be defined before this option will appear on the window.
STATE	If you want to generate the list for a specific State, point and click the drop-down menu arrow to view/select from a valid list. **Note**: Registry Client, IRMS Client, and Facility Client access users can use zip code, state, and county filters to limit their recalls.
COUNTY/PARISH	If you want to generate the list for a specific County/Parish, point and click the drop-down menu arrow to view/select from a valid list. **Note**: Registry Client, IRMS Client, and Facility Client access users can use zip code, state, and county filters to limit their recalls.
ZIP CODE	If you want to generate the list for a specific Zip Code, type the zip code in the field. **Note**: Registry Client, IRMS Client, and Facility Client access users can use zip code, state, and county filters to limit their recalls.
HEALTH DISTRICT/REGION	If you want to generate the list for a specific District/Region, point and click in the field and type the number. The checkbox will automatically get checked.
APPOINTMENT DATE **(FROM AND TO)**	If you want to generate the list for a specific Appointment Date range, type the “FROM” date and then press the TAB key to type the “TO” date. The checkbox will automatically get checked. **Note**: The appointment date must be on the Patient's Demographic record (Next Appt. Date) in order to be retrieved.
DEFERRED VACCINATIONS ONLY	If you want to generate the list for only those patients flagged with "Deferred Vaccinations," click the checkbox.

ITEM	DESCRIPTION
VACCINE FAMILIES AND OPTIONAL NEEDED DOSE NUMBERS:	Allows specific Vaccine Families to be chosen for the Reminder/Recall generation. By default, all of the Vaccine Families are selected (checked). Optionally, you can type the Dose Number in the field provided to isolate to a specific dose number.
NAME OF PERSON RUNNING REMINDER/RECALL	Type your name here.

3. Verify all your selections have been made and click one of the available buttons:

- **CLEAR ALL** – to erase any newly made selections and remain on the window.
- **RESET VALUES** – to reset the fields to their default values.
- **RUN REMINDER RECALL** – begins the generation and eventually the "Reminder Recall Output Select" window appears.

Note: The generation may take a few minutes. There is a status indicator at the bottom of the window. Wait until the indicator is full or has stopped.

Figure 14-2: Status Indicator

Eventually, a dialog box appears indicating the number of patients that were retrieved for the criteria entered.

Figure 14-3: Number of Patients in Recall Group Dialog Box

4. Point and click the **OK** button. The "Reminder/Recall Output Select" window appears with:

- Output Type
- Search criteria
- Printer Setup for postcards

Note: Due to the size of the window, each section is illustrated separately.

Figure 14-4: Reminder Recall Output Select Window

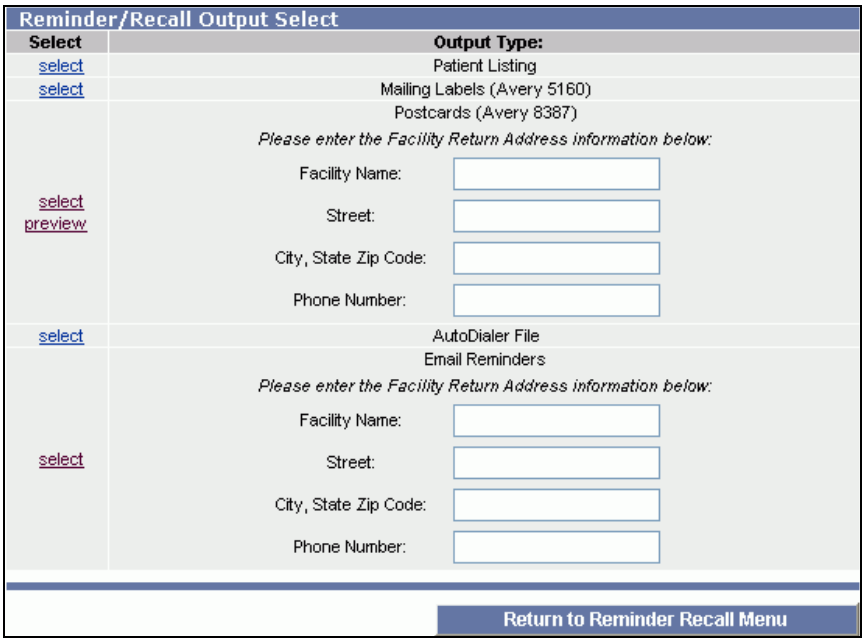


Figure 14-5: Reminder Recall Criteria Used

Reminder/Recall Criteria Used	
Limit By IRMS / IRMS ID	Yes / 1000
Increment Recall Count?	No
Reminder/Recall Date	01/01/1990 to 02/25/2004
Maximum Recall Tries	5
Include Inactive Patients	No
Limit By Patient Birth Date Range / Patient Birth Range	No /
Limit By Appointment Date Range	No /
Limit By Facility / Facility Name	No /
Limit By Physician / Physician Name	No /
Limit By Program / Program Code	No /
Limit By Health Plan / Health Plan Code	No /
Limit By State / State	No /
Limit By County / County	No /
Limit By ZIP Code / ZIP Code	No /
Limit By Health District/Region / Health District/Region	No /
Person Running Reminder/Recall	
Vaccine Family Codes To Remind/Recall For	DTaP/DT/Td*, FLU, HEP-A, HEP-B 2 DOSE**, HEP-B 3 DOSE**, HIB, MMR, PNEUMO (PCV7), POLIO, VARICELLA

Figure 14-6: Reminder Recall Print Settings

Reminder/Recall Print Settings	
Be sure to remove the Header and Footer before printing. To do this configure your browser by selecting File-->Page Setup... from the menu and deleting all text in the Header and Footer text fields.	
Postcards (Avery 8387):	In order for your data to print out with the correct spacing (to fit Avery 8387 postcards), configure your browser by selecting File-->Page Setup... from the menu and setting the margins as follows: **Internet Explorer** • Select Landscape Orientation • top: 0.75" • bottom: 0.25" • left: 0.25" • right: 0.25"

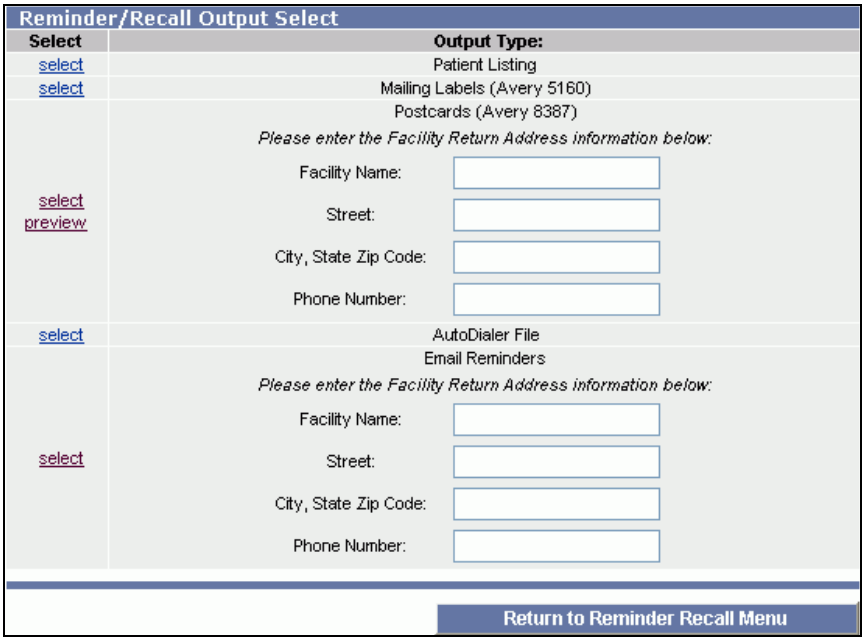
5. Continue to the next section titled, "Selecting the Output Type."

SELECTING THE OUTPUT TYPE

The process prior to selecting the output is the same, regardless of the output type. The output will display first providing the option to print/send them.

The various output types may require different setup steps. Perform the following steps based on the output type selected.

Figure 14-7: Selecting the Output Type



1. Choose the type of output you want to create. The Output Types are listed in the center of the window.

2. Click on the "**select**" hyperlink for the following types; continue to the bulleted list; otherwise, continue to step 3.

   - **Patient Listing** – Displays/prints the report criteria, total patients selected, and all patients in order of last name.
   - **Mailing Labels** (Avery 5160) – Displays/prints three labels across and ten labels down, or a total of thirty labels per sheet.
   - **Auto Dialer File** – Displays a text file that can be saved to your local hard drive or diskette. Instructions for saving the file are:

     a) Point and right-click inside the text area (inside the blue box).

     b) Click on **SELECT ALL** to highlight all the lines of the file.

     c) Click on **COPY** and open up your preferred text editor and open a new file and then choose PASTE.

d) Then save the file to the preferred directory with the file type of TXT.

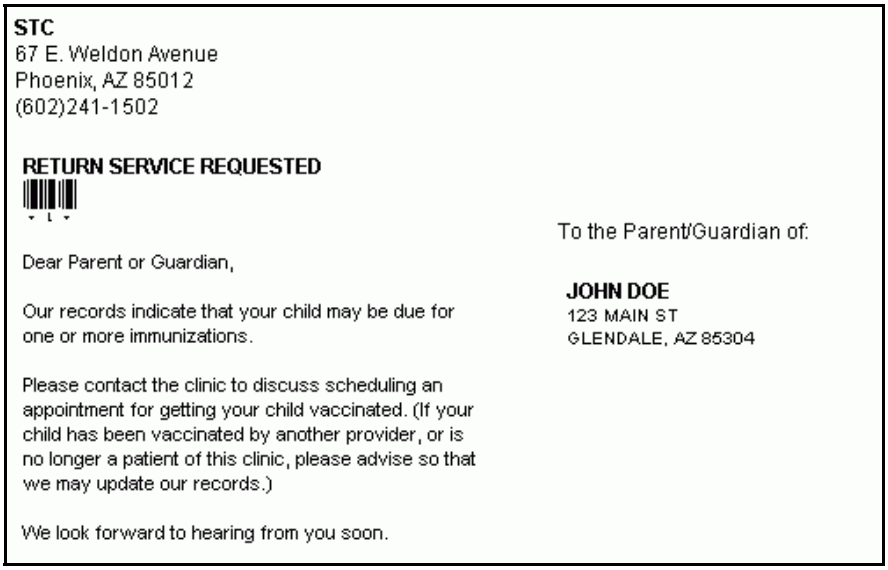
- **Emails**—Lists the patient, guardian, and email addresses of several patients on a list providing the option to send all the emails. Remember to type the "facility's return address" information.

  a) Click either on the **SEND EMAILS** button to send the emails or **CANCEL** to NOT send the emails and return to the "Recall Output – Select" window.

3. When running **Postcards**, you can choose to use the default message or you can define your own custom message. Click on either the **SELECT** or **PREVIEW** buttons.

- **SELECT** – Displays/prints two postcards across with the barcode. Remember to type the facility's return address information.

Figure 14-8: Postcards Output Display


STC
67 E. Weldon Avenue
Phoenix, AZ 85012
(602)241-1502

RETURN SERVICE REQUESTED

To the Parent/Guardian of:

JOHN DOE
123 MAIN ST
GLENDALE, AZ 85304

Dear Parent or Guardian,

Our records indicate that your child may be due for one or more immunizations.

Please contact the clinic to discuss scheduling an appointment for getting your child vaccinated. (If your child has been vaccinated by another provider, or is no longer a patient of this clinic, please advise so that we may update our records.)

We look forward to hearing from you soon.

- **PREVIEW** – Displays a new window revealing the default postcard message with the radio button selected, along with an open field area to create your own custom message (shown below).

Figure 14-9: Postcard Message

4. If you are going to create a custom message, position the mouse pointer in the blank field area and type your text.

5. Click on one of the radio buttons:

   - **DEFAULT** – To display/print the default message and click the **PRINT** button to display/print.
   - **USER DEFINED** – To display/print the custom message and click on the **SAVE & PRINT** button to save your custom message and display/print the postcards.

6. Regardless of the button clicked, the postcards will display in a new window providing the option to print.

INSTRUCTIONS FOR PRINTING ALL REMINDER RECALL OUTPUT

After displaying the output, more than likely you will want to print it. Verify your browser has been set up properly so headers and footers do not print on the output.

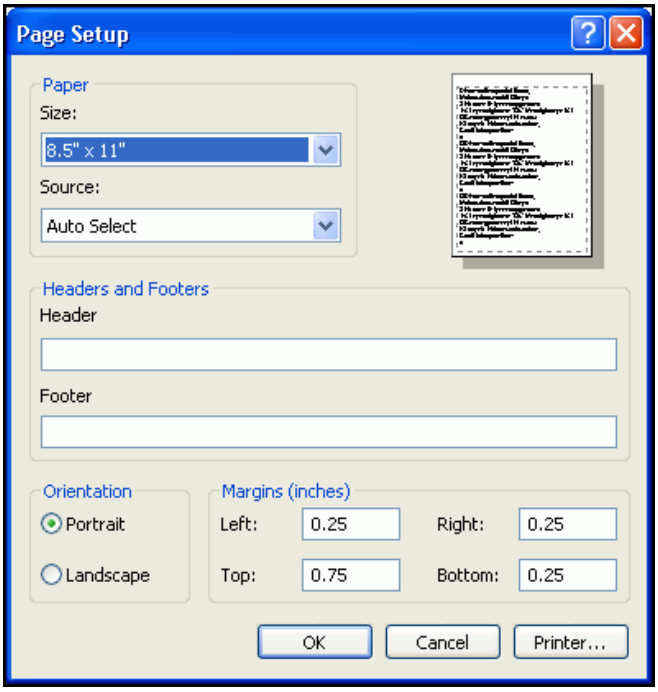
Additionally, depending on the output such as Postcards, you may need to change the margin setting(s).

PAGE SETUP – HEADERS/FOOTERS & MARGINS

To change the Page Setup, perform the following:

1. Point and click on the **FILE** menu and choose the **PAGE SETUP** option.
2. Delete all the text in the **HEADER** and **FOOTER** fields. Set the **TOP** margin to **0.75** with all the other ones set to **0.25**. Your Page Setup should look similar to this:

Figure 14-10: Page Setup – Headers and Footers



3. Click the **OK** button.
4. Click the **PRINT** icon to submit your output to the printer.

Note: You may want to periodically check this if your system is used for other types of printing.

REMINDER RECALL OUTPUT SAMPLES

Note: If the application was configured to not display a barcode, a normal patient id number will be displayed.

Patient Listing – Displays/prints the report criteria, total patients selected, and all patients in order of last name.

Figure 14-11: Patient Listing

Reminder Recall Patient Recall Group Listing

Report Criteria **Report Date:** February 25, 2004

IRMS: 1000
Recall Date: 01/01/1990 **to** 02/25/2004
Birth Date Range: All
Include Inactive Patients: No
Person Generating Recall:
Facility: All
Health Plan: All
Physician: All
Program: All
District/Region Number: All
Vacc. Families: DTaP/DT/Td*, FLU, HEP-A, HEP-B 2 DOSE**, HEP-B 3 DOSE**, HIB, MMR, PNEUMO (PCV7), POLIO, VARICELLA

* DTaP should be given to patients under 7 years old. Td should be given to patients 7 years old or older.
** If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.

Total Patients Selected: 11

Bar Code/ID	First Name	Middle Name	Last Name	Birthday	Guardian F.N.	Phone Number
	JOIA	L	ARVIE	01/01/2001		

Vaccine Family Name	Dose Number	Recommended Date	Minimum Date
HEP-B 3 DOSE**	1	01/01/2001	01/01/2001
MMR	1	02/01/2002	02/01/2002
VARICELLA	1	02/01/2002	02/01/2002
DTaP/DT/Td*	1	03/01/2001	02/12/2001
HIB	1	03/01/2001	02/12/2001
POLIO	1	03/01/2001	02/12/2001
PNEUMO (PCV7)	1	03/01/2001	02/12/2001

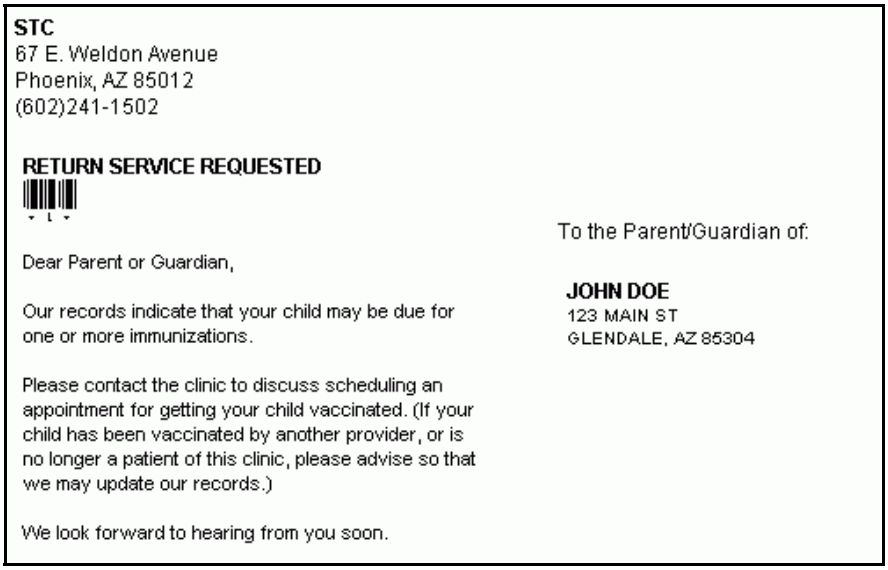
Mailing Labels (Avery 5160) – Displays/prints three labels across and ten labels down, or a total of thirty labels per sheet.

Figure 14-12: Mailing Labels

To the parents of: THOMAS NIELSON , STC	To the parents of: JOAN1 SMITH 100 MAIN STREET PHOENIX, AZ 85012	To the parents of: JOAN2 SMITH 100 MAIN STREET PHOENIX, AZ 85012

Postcards (Avery 8387) – Displays/prints two postcards across. Remember to type the "facility's return address" information. Requires special margin settings.

Figure 14-13: Postcards


STC
67 E. Weldon Avenue
Phoenix, AZ 85012
(602)241-1502

RETURN SERVICE REQUESTED

To the Parent/Guardian of:

JOHN DOE
123 MAIN ST
GLENDALE, AZ 85304

Dear Parent or Guardian,

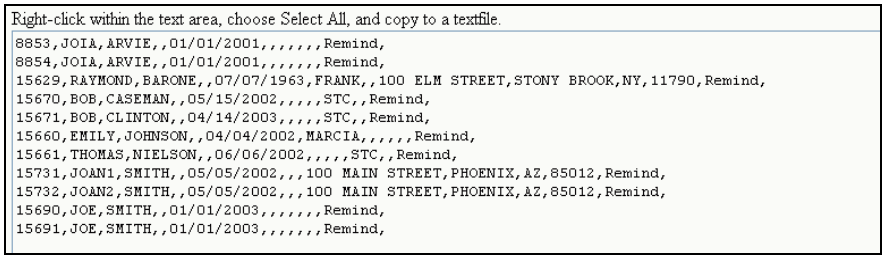
Our records indicate that your child may be due for one or more immunizations.

Please contact the clinic to discuss scheduling an appointment for getting your child vaccinated. (If your child has been vaccinated by another provider, or is no longer a patient of this clinic, please advise so that we may update our records.)

We look forward to hearing from you soon.

Auto Dialer File – Displays a text file that can be saved to your local hard drive or diskette. Refer to the sample output for additional instructions on saving.

Figure 14-14: Auto Dialer File


Right-click within the text area, choose Select All, and copy to a textfile.

```
8853,JOIA,ARVIE,,01/01/2001,,,,,,,Remind,
8854,JOIA,ARVIE,,01/01/2001,,,,,,,Remind,
15629,RAYMOND,BARONE,,07/07/1963,FRANK,,100 ELM STREET,STONY BROOK,NY,11790,Remind,
15670,BOB,CASEMAN,,05/15/2002,,,,,STC,,Remind,
15671,BOB,CLINTON,,04/14/2003,,,,,STC,,Remind,
15660,EMILY,JOHNSON,,04/04/2002,MARCIA,,,,,,Remind,
15661,THOMAS,NIELSON,,06/06/2002,,,,,STC,,Remind,
15731,JOAN1,SMITH,,05/05/2002,,,100 MAIN STREET,PHOENIX,AZ,85012,Remind,
15732,JOAN2,SMITH,,05/05/2002,,,100 MAIN STREET,PHOENIX,AZ,85012,Remind,
15690,JOE,SMITH,,01/01/2003,,,,,,,Remind,
15691,JOE,SMITH,,01/01/2003,,,,,,,Remind,
```

Emails—Lists the patient, guardian, and email addresses of several patients on a list providing the option to send all the emails. Remember to type the "facility's return address" information.

Figure 14-15: Reminder Recall Email

Reminder/Recall Email

Logged in: SHERRI BULL **Date:** February 25, 2004

Note: Emails will only be sent to patients who have a valid email address listed. Please press the "Send Emails" button only once in order to avoid sending duplicate emails.

Patient	Guardian	Email Address
PEARY BARTLETT	TERRY	
SHERRY BARTLETT	TERRY	
SHERRI BULL		
SHERRI BULL		
SANDRA BULLOCK		
JOHN DOE	MARY	
TOMMY FRANKS	MARTHA	
GOLDEN GLOBE	MOMMY	
SALLY GREEN	LINDA	
ROBIN HOOD		
MURPHY JOLLEY	DANIELLE	
STEVE O		
SINGH SHANTI		
BOB SMITH		
TAMMY SMITH	MOMMY	
TOMMY TEST	MARIA	
TOMMY TEST	JUDY	
BERRETH TI	AMBER	

Cancel Send Emails

15 IMPORTS MENU

The **IMPORTS MENU** offers options to import (upload) files directly to the state registry. The options that display depend on your user access and permissions. The following options are available:

- **DTT/HL7** -- This option allows users to send patient information files that originate in the facility's patient management system (or other source that matches the import type requirements). This includes Remote Clinic contraindications, and ENCD Data.

  Note: ENCD is used to notify the state when a person under the age of 18 has died. We can accept this data so that we can stop mailings from being sent to deceased children. The ENCD file can be loaded through the DTT and run through the normal de-duplication logic. All records coming from this file will be marked with the "inactive status" of deceased. If a record already exists for the patient, that record will be updated. If a record does NOT exist, a new record will be created.

- **VacMan Upload** – This option allows users to upload patient information from the Vaccine Manager, referred to as VacMan.

- **HL7 Realtime** – This option allows users to upload patient information via HL7 in Realtime.

There are different file specifications depending on the billing system.

Once the file is imported by the facility, the state will import it into the registry.

Note: Using a scheduler such as the Microsoft Scheduler can also setup automatic running/processing of files or reports such as the DTT Imports.

When importing batch vaccinations, the vaccination that ends up in the master record is the one that contains the most information; i.e., specific vaccine type, administered shot, lot number, combination vaccine. A procedure is used to "score" the immunization to determine if the incoming or existing shot is the "winner" for the master record. The score is determined as follows:

- Administered shot (historical is null) 1
- Specific Vaccine type 2
- Has Lot Number 3
- Combination Vaccine 1
- Total Possible Score 7

ABOUT DTT/HL7 IMPORTS

The following can be performed from the "DTT/HL7 Import" window:

- Import (an existing Data Profile)
- Define (a New) Data Profile
- Define a new Profile with Pre-Defined Fields
- Edit an Existing Data Profile
- Print a Data Profile Report
- View Import Logs
- The maximum Import file size is 100 MB.

The **DTT** import process will correctly identify the records with the following common problems from the ACS file.

- 0Y (zero + Y) can become OV (letters O + V).
  - Any letter O in the Mail Code of the Keyline should be treated as a Zero.
  - Any letter V in the Mail Code of the Keyline should be treated as a letter Y.

  Language Code can be incorrect.
  - If the language code contains an S assume it is Spanish. Otherwise, assume it is English.
  - If a mail code starts with I assume it is INPKT.

As of version 3.0, a state configurable option can be set to prevent short names from overwriting full names during a batch DTT/HL7 import. For example, if Chris were imported, the short name of Chris would not overwrite the full name of Christopher. Another state configurable option can be set to prevent "incoming" unnamed babies (i.e., Newborn, Baby Boy, Baby Girl) to overwrite demographic information. This option operates as though the user selected the Do Not Overwrite Demographic Information flag when importing via the DTT.

Continue to the section corresponding to the action you want to perform.

IMPORTING DTT OR HL7 FILES

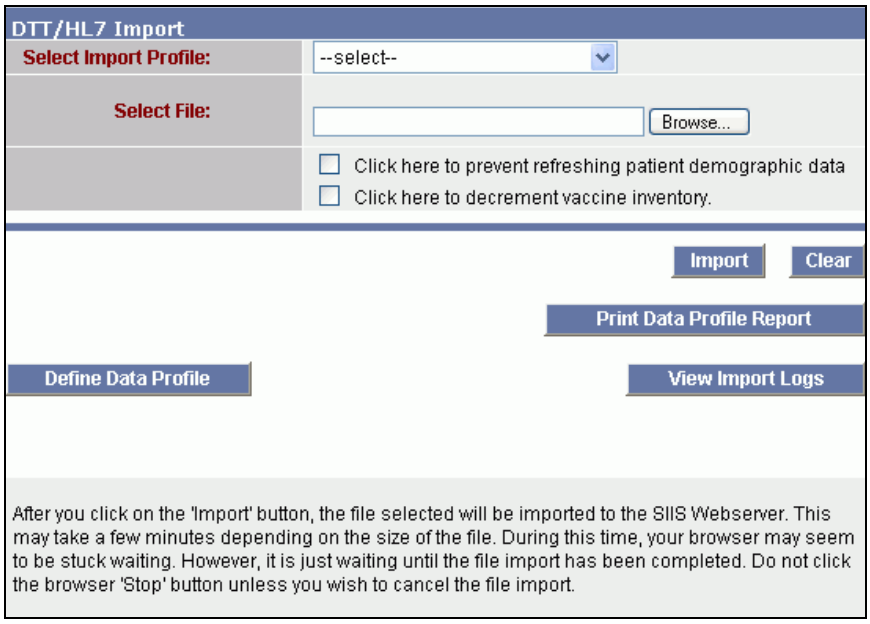
This option assumes a data profile has already been defined and you are ready to upload the file to the State.

Note: In order to make file uploads more efficient, DTT import files may be zipped. Multiple files may be included in a single ZIP file, as long as all files match the profile being used for the import.

To import a DTT or HL7 file, perform the following:

1. From the **IMPORTS** menu point and click on the **DTT/HL7** option. The "DTT/HL7 Import" window appears.

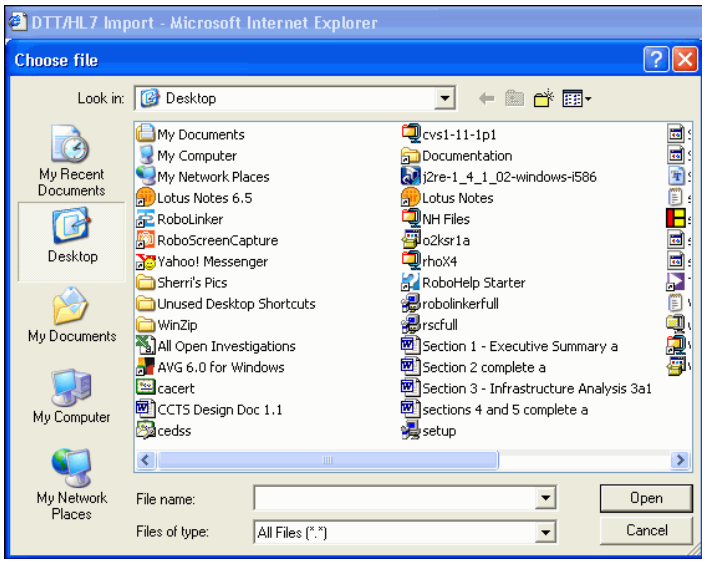
Figure 15-1: DTT/HL7 Import



2. In the **SELECT IMPORT PROFILE** field, click the drop-down arrow to view a list of valid import profiles and click one to select it. A few possible examples are:
   - PCIC Demographic
   - PCIC Facility
   - PCIC Immunization
   - PCIC Physician
   - Remote Clinic
   - Gateway Message Format
     - **a)** Can contain up to four unique files (Facility (F), Physician (Y), Demographic (D), and Immunizations (I)).
3. For states using Data ID Mapping, the user will need to select the Import Profile AND a Facility/Physician Mapping for the IRMS from a drop-down menu.

4. In the **SELECT FILE** field, click the **BROWSE** button and select the file to import. The "Choose File" window appears.

Figure 15-2: Choose Import File Dialog Box



5. Point and double-click the file name to select it or click the **OPEN** button. The "DTT/HL7 Import" window reappears with the "chosen" file name.

6. In the "**CLICK HERE TO PREVENT REFRESHING PATIENT DEMOGRAPHIC DATA**" checkbox, click it to:

   - Insert patient demographic records as "historical" since they already exist, the demographic information in the master patient record will NOT be updated.

7. If the patient does not exist in the registry, they are added as usual.

8. In the "**CLICK HERE TO DECREMENT VACCINE INVENTORY**" checkbox, click it to decrease the provider's vaccine inventory; otherwise, vaccinations are not decremented in the provider's vaccine inventory.

   - If a vaccination lot number is sent through the DTT and matches a lot number in the provider's inventory, decrement the number of vaccinations in the provider's inventory.

- If a vaccination lot number is sent through the DTT and **DOES NOT MATCH** a lot number in the provider's inventory, do not decrement. The vaccination will be rejected and noted on the DTT Error Report.
- If a vaccination is sent through the DTT and the vaccination lot number is inactive, the vaccination will be rejected and noted on the DTT Error Report.

9. Point and click on one of the available buttons:

- **IMPORT** button to send the file to be processed by the State Registry staff.

Note: This may take some time to process depending on the size of the file. The browser may time out when processing lengthy imports. Periodically, check the "Import Log" to ensure the import processed properly.

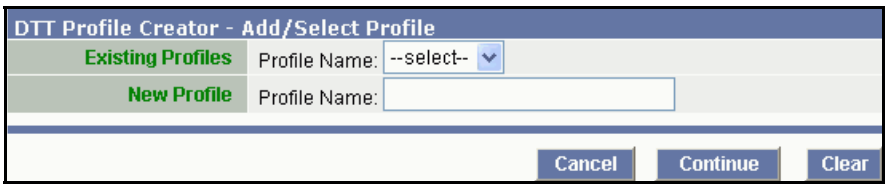
- **CLEAR** button to clear the fields in order to re-enter the criteria.

CREATE A NEW DATA PROFILE OR EDIT EXISTING PROFILE

This button is used when you want to create a new data profile, create a profile with "pre-defined fields," or edit an existing profile.

1. From the "DTT/HL7 Import" window, click the **DEFINE DATA PROFILE** button. The "DTT Profile Creator – Add/Select" window appears.

Figure 15-3: DTT Profile Creator – Add/Select Profile



Note: If you are creating a **NEW PROFILE**, continue to step two; otherwise if editing an

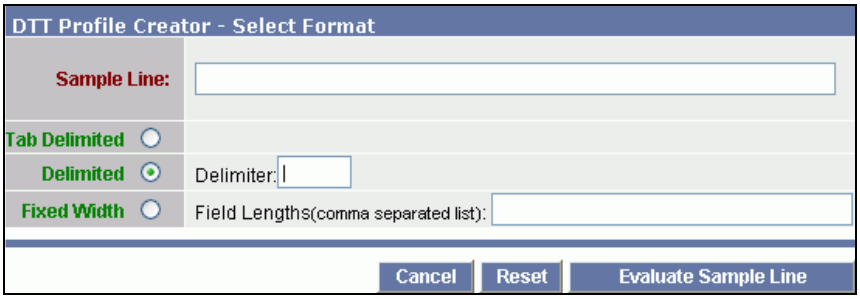
EXISTING PROFILE, click the drop-down arrow in the **EXISTING PROFILES** field and select a profile name.

2. If you are creating a **NEW DATA PROFILE**, type the new profile name in the **NEW PROFILE** field. If editing an **EXISTING PROFILE**, click the drop-down arrow for a list of existing profiles.

3. Click one of the available buttons:

   - **CANCEL** – to not create/edit the profile and exit to the "DTT/HL7 Import" window.
   - **CLEAR** – to erase the fields and re-enter profile names/choices.
   - **CONTINUE** – to access the file format selection. The "DTT Profile Creator – Select Format" window appears.

Figure 15-4: DTT Profile Creator – Select Format



4. Type an example of the incoming data in the **SAMPLE LINE** field.

   Note: For demonstration purposes (shown below), we have a delimited file using the pipe symbol for our delimiter. The sample line will contain a medical record number, first name, last name, date of birth, and gender.

5. Indicate the incoming file's field separator type by clicking one of the radio buttons:

   - **TAB Delimited** – indicates the data fields are separated using TABS.
   - **DELIMITED** – indicates a special symbol is used to separate the data fields.

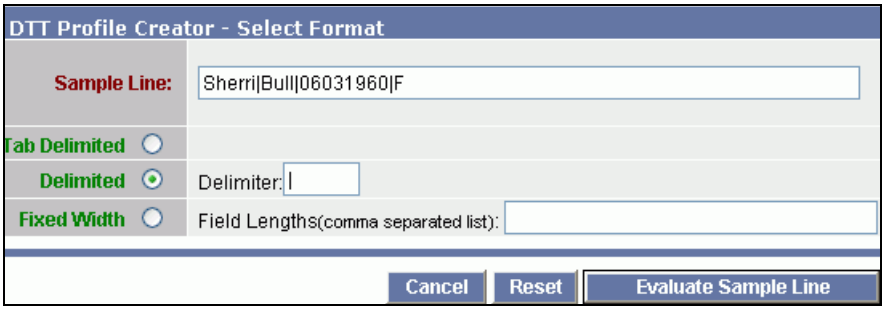
a) Type the symbol used in the **DELIMITER** field. For example, type the pipe symbol (|).

Note: When using Full Names (Patient, Guardian, Facility Contact, or Physician), you CANNOT use a comma as the delimiter symbol.

- **FIXED WIDTH** – indicates the data fields are fixed in width.

  a) Type a number for each field's length, separating each with a comma.

Figure 15-5: DTT Profile Creator – Select Format with Sample Line



6. The fields and their descriptions are listed in the table:

Table 15-1: DTT Profile Creator – Select Format Field Descriptions

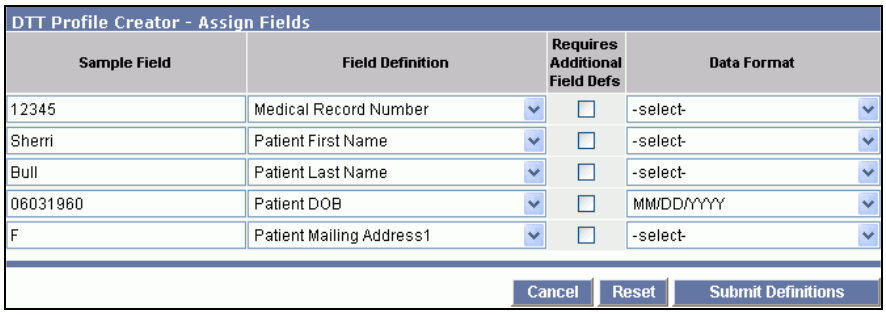
COLUMN	DESCRIPTION
SAMPLE LINE	A sample row of the data format being imported. **Note**: It is recommended to copy a sample line from the actual file being imported, and then paste it into the Sample Line to alleviate errors.
TAB DELIMITED	Indicates the data file being imported uses the **TAB** symbol/character as the separator between the fields. You MUST copy and paste from the file being imported. Be sure to click the Tab Delimited radio button.
DELIMITED	Indicates the data file being imported uses a special symbol between fields; e.g., the pipe symbol (|). Copy/paste, or type the sample line

COLUMN	DESCRIPTION
	and indicate what the delimiter character is in the **DELIMITER** field. **Note**: When using **FULL NAMES** (Patient Full Name, Guardian Full Name, Facility Contact Full Name, or Physician Full Name), the COMMA symbol CANNOT be used as the separator character since it is used to define the Data Format. Be sure to click the Delimited radio button.
FIXED WIDTH	Indicates the data file being imported uses a fixed width between fields. For example, if the first field uses 25 characters, and the second field uses 10, your entry in the Field Length would be 25,10 Be sure to click the Fixed Width radio button.

7. Click one of the available buttons:

- **CANCEL** to return to the "DTT Profile Creator – Add/Select Profile" window.
- **CLEAR** to erase the data, remain on the window to re-enter new data.
- **EVALUATE SAMPLE LINE** to continue and access the "DTT Profile Creator—Assign Fields" window.

Figure 15-6: DTT Profile Creator – Assign Fields



8. The columns and their descriptions are listed in the table:

Table 15-2: DTT Profile Creator – Assign Fields Descriptions

COLUMN	DESCRIPTION
SAMPLE FIELD	A sample row of data that is incoming. This is the sample line that was entered on the "DTT Profile Creator – Select Format" window and cannot be changed here.
FIELD DEFINITION	This column is used to indicate IWEB's description of the Sample (Line) Field so it can be identified. Click on the drop-down menu arrow to view/select a valid choice. Examples are: • Patient Full Name • Guardian Full Name • Facility Contact Full Name • Physician Full Name **Note**: It is recommended to choose all of the Field Definitions before choosing other information.
REQUIRES ADDITIONAL FIELD DEFS	This column is used to indicate that a field will also be used as an additional field in IWEB. For example, if a medical record number is entered, this could also be mapped as a Patient Birth File Number. Another example would be for multiple race codes (White and African American) would need to be mapped to indicate there are multiple codes. Be sure to click the checkbox if additional mapping needs to be defined.
DATA FORMAT	This column is used to indicate the format of the incoming field. Click on the drop-down menu arrow to view/select the appropriate format. Examples are: • Dates • First Middle Last Suffix • First Middle Last, Suffix • Last Suffix, First Middle • Last, First, Middle, Suffix

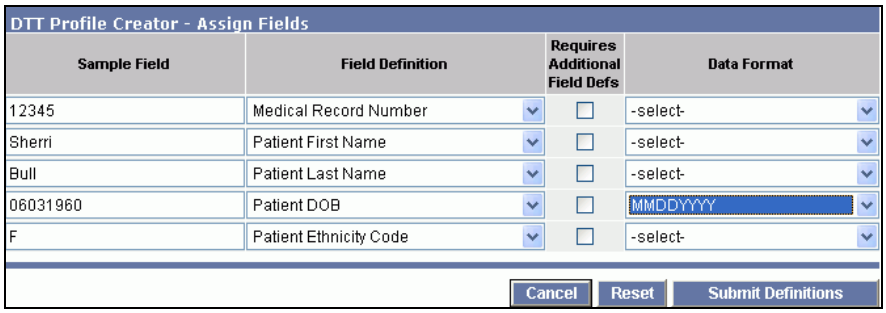
COLUMN	DESCRIPTION
	• Last, First Middle Suffix Both Middle (name) and Suffix are optional. If the format selected does not have commas to differentiate the location of each, and only one is passed, the value will be considered a suffix if it is one of the following: II, III, IV, SR, JR (this list includes the spelling variations, Junior, Senior, 2nd, etc.) Validation has been added to name formats. If a name format is selected and the data passed is not in the correct format (i.e., name is supposed to have commas and it does not), the user will receive an error message viewable via the DTT Import Log.

9. Using the sample field, choose the appropriate **FIELD DEFINITION** by clicking the drop-down menu arrow to view/select a valid definition. For example, the first line in the "Sample Field" (shown above) contains the numbers 12345.

- Click on the drop-down arrow in the "Field Definition" column, and choose "**medical record number**."
- Continue defining the fields until all have been defined.

The window should now resemble the one shown below.

Figure 15-7: DTT Profile Creator – Assign Fields with Field Definitions



10. Using the Field Definition column, click the drop-down menu arrow to view/select a valid **DATA FORMAT** specifically for:

- Dates
- First Middle Last Suffix
- First Middle Last, Suffix
- Last Suffix, First Middle
- Last, First, Middle, Suffix
- Last, First Middle Suffix

11. To indicate whether a field needs additional mapping (e.g., multiple race codes), click the **REQUIRES ADDITIONAL FIELD DEFS** checkbox.

12. Click one of the available buttons:

- **CANCEL** – to return to the "DTT/HL7 Import" window.
- **CLEAR** – to erase and re-enter new field/date definitions.
- **SUBMIT DEFINITIONS** – to save the profile and display one of the following windows:

  a) "DTT Profile Creator – Define Multiple Value." Continue to the section titled, "Defining Multiple Values."

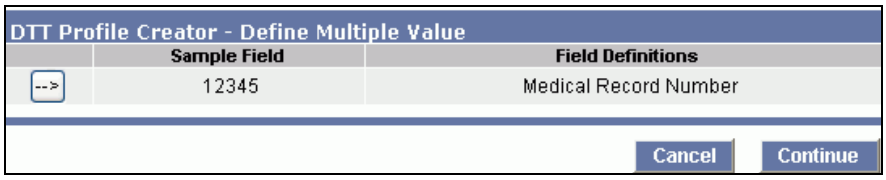
  b) "DTT Profile Creator – Required Mappings." Continue to the section titled, "Mapping Fields."

  c) "DTT Profile Creator – Define Default Value." Continue to the section titled, Defining Default Values."

DEFINING MULTIPLE VALUES

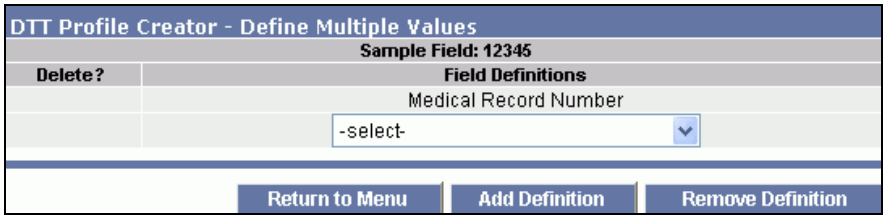
The "DTT Profile Creator – Define Multiple Value" window appears when you want to map a field to have an additional value. For example, medical record number could be the same as Patient Birth File number.

Figure 15-8: DTT Profile Creator – Define Multiple Value



1. From the "DTT Profile Creator – Define Multiple Value" window, click the **SELECT ARROW** button. The "DTT Profile Creator – Define Multiple Values – (Edit)" window appears:

Figure 15-9: DTT Profile Creator – Define Multiple Values (Edit)



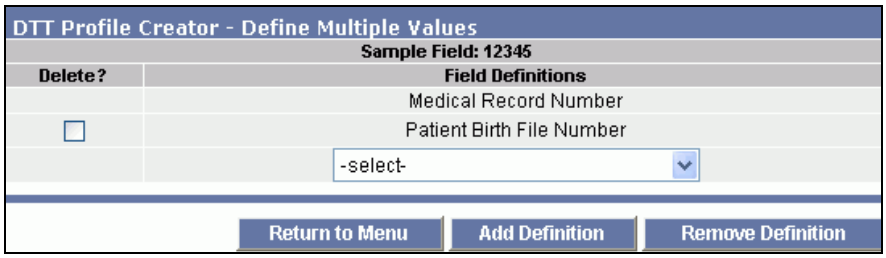
2. Click the drop-down arrow to view/select an additional field for the Sample Field value.

3. Click one of the available buttons:

   - **RETURN TO MENU** – returns to the "DTT Profile Creator – Define Multiple Value" window. If you have not clicked the Add or Remove button, no changes will be saved.

   - **ADD DEFINITION** – saves the selection, adds the DELETE checkbox, and remains on the "DTT Profile Creator – Define Multiple Values – (Edit)" window.

Figure 15-10: DTT Profile Creator – Define Multiple Values (Edit) with Delete Checkbox



   - **REMOVE DEFINITION** – deletes the additional field value after clicking in the **DELETE** checkbox

and remains on the "DTT Profile Creator – Define Multiple Value – (Edit)" window.

4. Click the **RETURN TO MENU** button. The "DTT Profile Creator – Define Multiple Value" window appears.

5. Click the **CONTINUE** button. The "DTT Profile Creator – Required Mappings" window appears. Continue to the next section titled, "Mapping Fields" for instructions.

MAPPING FIELDS

The word "mapping" means the translation of the import file codes coinciding with the registry acceptance codes).

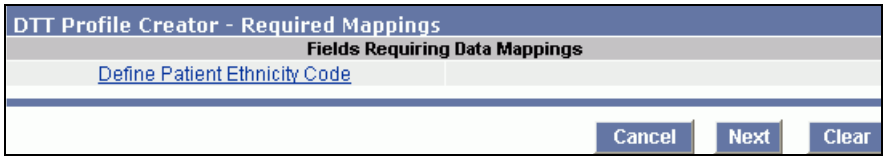
The "DTT Profile Creator – Required Mappings" window appears after clicking the CONTINUE button on the "DTT Profile Creator – Define Multiple Value" window.

Examples of when you might see fields listed in this window are when your profile includes the fields:

- Patient Gender Code
- Patient Ethnicity Code
- Vaccine Code
- Manufacturer Code
- County Code, etc.

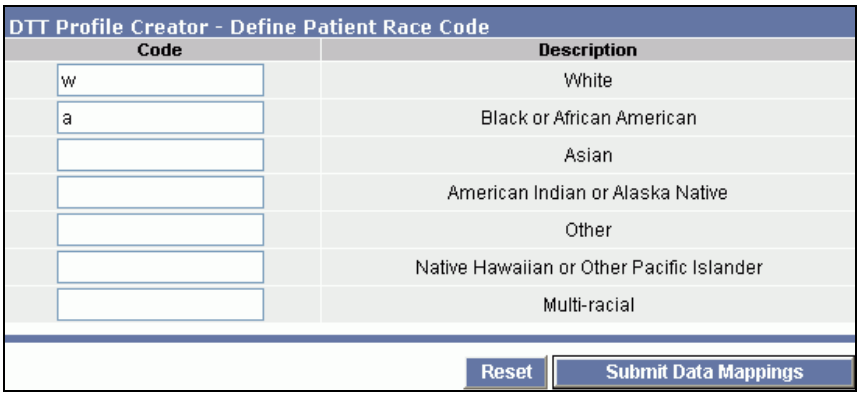
If you do not see the "DTT Profile Creator – Required Mappings" window, continue to the next section.

Figure 15-11: DTT Profile Creator – Required Mappings



1. Click the **HYPERLINK** (words underscored in blue). The "DTT Profile Creator – Define (name of field)" window appears.

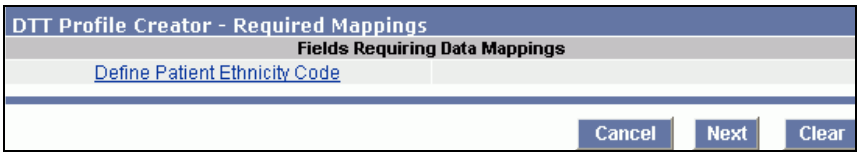
Figure 15-12: DTT Profile Creator – Define (Name of Field)



2. In the **CODE** column, type the corresponding code that matches the **DESCRIPTION** column.

3. Click one of the available buttons:

   - **RESET** – to erase any newly typed text and remain on the same window.
   - **SUBMIT DATA MAPPINGS** – to save and return to the "DTT Profile Creator – Required Mappings" window.



4. Click one of the available buttons:

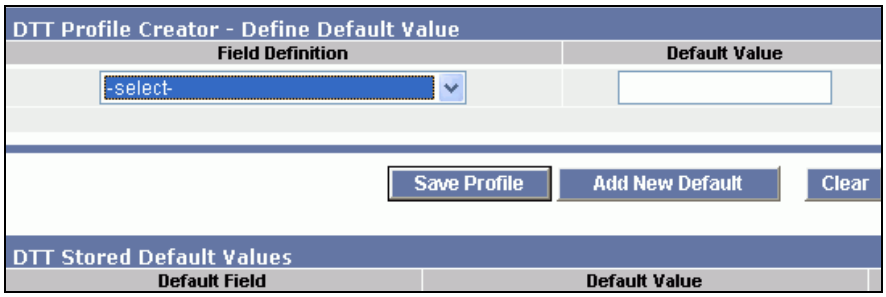
   - **CANCEL** – to not save and exit to ?
   - **NEXT** – to save and display the "DTT Profile Creator – Define Default Value" window. Continue to the next section titled, "Defining Default Values" for instructions.

DEFINING DEFAULT VALUES

The "DTT Profile Creator – Define Default Value" window appears after clicking NEXT on the "DTT Profile CREATOR – Required Mappings" window. It is used to set up defaults for

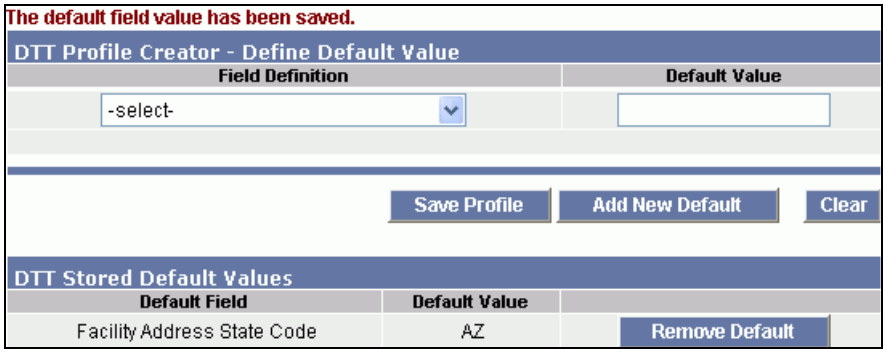
specific fields. An example of use is the Facility's Address State Code.

Figure 15-13: Profile Creator – Define Default Value



1. In the **FIELD DEFINITION** column, click the drop-down menu arrow to view/select a **FIELD**.
2. Press the **TAB** key to position the mouse cursor in the **DEFAULT VALUE** field.
3. Type the appropriate **VALUE** in the field and then click one of the available buttons:
   - **ADD NEW DEFAULT** – saves the entries and places the new default at the bottom of the window.

Figure 15-14: DTT Profile Creator – Define Default Value – Default Added

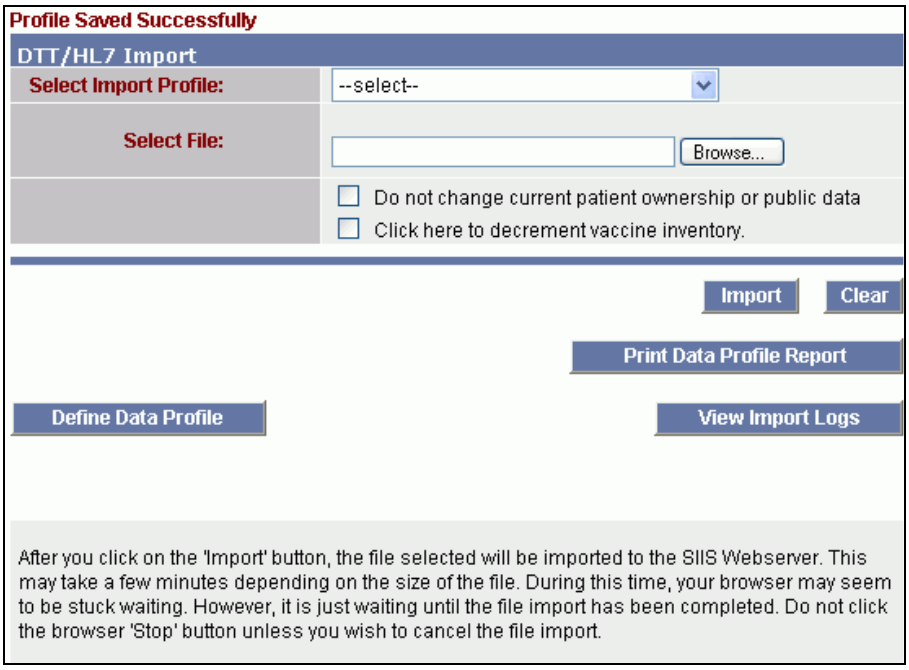


   - **CLEAR** – erases any selections/text entered and remains on the window.
   - **REMOVE DEFAULT** – Removes the default value and remains on the window.

Note: This button will not appear if there are not any defaults set.

- **SAVE PROFILE** – Saves the profile and returns to the "DTT/HL7 Import" window. If you have added a new default, verify it displays in the bottom portion of the window before saving the profile, or your defaults will not be saved.

Figure 15-15: DTT/HL7 Import – Profile Saved Successfully



PRINT DATA PROFILE REPORT

This option will print an existing data profile report.

1. From the "DTT/HL7 Import" window, in the **SELECT IMPORT PROFILE** field, point and click the drop-down arrow to view/select a valid profile.
2. Click the **PRINT DATA PROFILE REPORT** button to display the report in a new browser window providing the option to print.

Figure 15-16: Data Profile Report

PCIC DEMOGRAPHIC

IRMS: 1000
Creation Date:
Last Updated:

Format: Delimited
Delimiter: |
Field order and mappings:

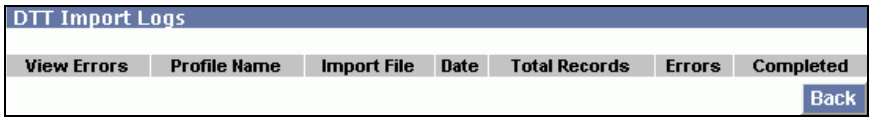
- Medical Record Number
- Patient First Name
- Patient Middle Name
- Patient Last Name
- Patient Suffix
- Patient SSN
- Patient DOB
  - Date Format: MM/DD/YYYY
- Patient Mailing Address1
- Patient Physical Address
- Patient Address City
- Patient Address State Code
- Patient Address Zip Code
- Patient Gender Code
- Patient Race Code
- Mother Maiden Name
- Guardian First Name
- Guardian Middle Name
- Guardian Last Name
- Guardian SSN
- Patient Phone Number Area Code
- Patient Phone Number
- Inactive Code
- Patient Medicaid Number
- Managed Care Plan Name
- Managed Care Plan ID
- Managed Care Plan Date
  - Date Format: MM/DD/YYYY
- Patient County FIPS Code
- Patient Ethnicity Code
- Patient Health District
- Patient VFC Eligible Code
- Facility ID
- Physician ID
- *Undefined Field*
- Patient Email Address
- Block Recall
- Programs List
- School District Code
- Patient Birth State
- Patient Birth Country
- Comments
- Patient Language

VIEW IMPORT LOGS (FOR ERRORS)

This option is used to view previously submitted imports and to see what the errors are so they can be corrected and then be re-imported.

1. From the "DTT/HL7 Import" window, click the **VIEW IMPORT LOGS** button. The "DTT Import Logs" window appears.

Figure 15-17: DTT Import Logs



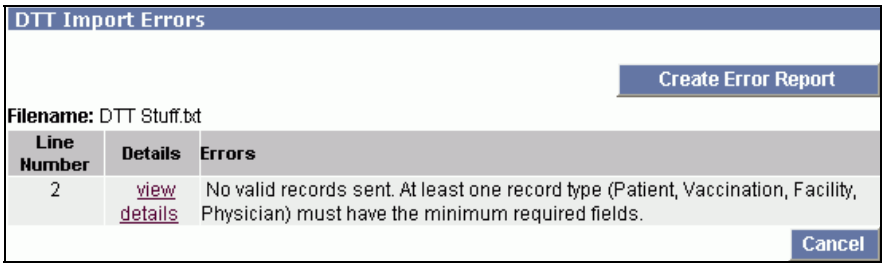
2. The columns that appear are listed in the table:

Table 15-3: DTT Import Logs Column Descriptions

COLUMN	DESCRIPTION
VIEW ERRORS	Contains the SELECT ARROW to select the desired file log.
PROFILE NAME	Name of the Data Profile used for the import.
IMPORT FILE	Name of the Import File.
DATE	Year, month, day, and timestamp the import log was created.
TOTAL RECORDS	Number of records sent with the import.
ERRORS	Number of errors within the error log. **Note**: If the total number of errors exceeds 100, you may want to import a smaller file by copying/pasting a subset of the larger "original" file and view its errors. When the number of errors is large, the browser can experience a "memory limitation" and you will not be able to view the errors.
COMPLETED	This column indicates whether or not the full import file was read in during the import and will contain a Yes or No.

3. Locate the file whose errors you want to view by clicking on the **SELECT ARROW** button (under the "View Errors" column). The "DTT Import Errors" window appears.

Figure 15-18: DTT Import Errors



4. The fields/columns of information are listed in the table:

Table 15-4: DTT Import Errors Field/Column Descriptions

COLUMN	DESCRIPTION
FILENAME	Name of the file that was imported appended with the file's type. The example reflects DTT Stuff.txt.
LINE NUMBER	The row/line number in the file that caused the error.
DETAILS	The **VIEW DETAILS** hyperlink displays the "DTT Import Error Detail Log" for the specific line of the error.
ERRORS	Description of the error. The error in this example was caused by a blank row being sent.

DTT Import Error Detail - Line2

Errors Found

- No valid records sent. At least one record type (Patient, Vaccination, Facility, Physician) must have the minimum required fields.

Back to Error List

Field Definition	Date Format	Field Value
Medical Record Number		null
Patient Full Name		
Patient DOB	MMDDYYYY	
Patient Gender Code		
Patient Birth State		AZ

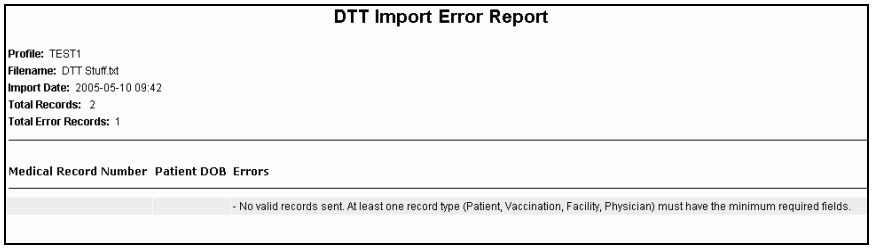
Back to Error List

5. Click on an available button or hyperlink:

- **CANCEL** – to return to the "DTT Import Logs" list window.
- **CREATE ERROR REPORT** – to display a report of all the errors in a new browser window. The

window provides an option to print. Close the browser window when finished viewing/printing.

Figure 15-19: DTT Error Report

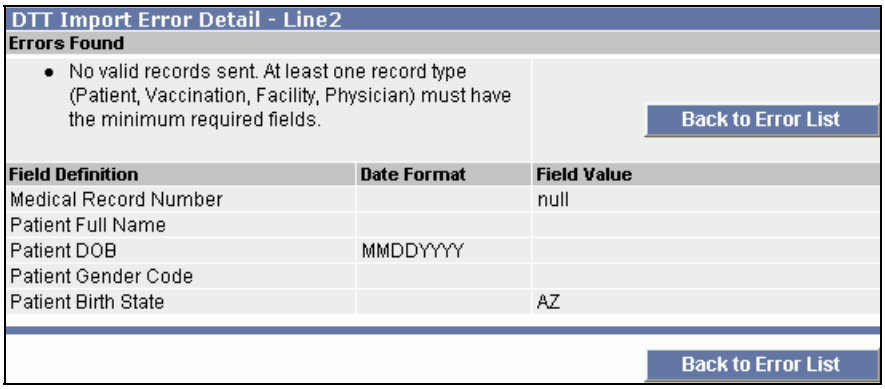

DTT Import Error Report

Profile: TEST1
Filename: DTT Stuff.txt
Import Date: 2005-05-10 09:42
Total Records: 2
Total Error Records: 1

Medical Record Number	Patient DOB	Errors
		- No valid records sent. At least one record type (Patient, Vaccination, Facility, Physician) must have the minimum required fields.

- **VIEW DETAILS** – to display the "DTT Import Error Detail" window (sample shown below).

Figure 15-20: DTT Import Error Detail – Line 1


DTT Import Error Detail - Line2

Errors Found

- No valid records sent. At least one record type (Patient, Vaccination, Facility, Physician) must have the minimum required fields.

Back to Error List

Field Definition	Date Format	Field Value
Medical Record Number		null
Patient Full Name		
Patient DOB	MMDDYYYY	
Patient Gender Code		
Patient Birth State		AZ

Back to Error List

6. Click the **BACK TO ERROR LIST** to return to the "DTT Import Errors List" window.

TYPES OF IMPORT ERRORS

If the Administrator has set the DTT Properties to "Error on Unspecified Vaccination Import," you will receive an error indicating, "The vaccine given for an administered vaccination cannot be unspecified."

At least one record type (Patient, Vaccination, Facility, or Physician) must have the minimum required fields or no valid records will be sent.

The fields and their values are listed in the table:

Table 15-5: DTT Import Errors

FIELD	VALUE MUST BE ….
FACILITY ZIP CODE	Numeric and either be 5 or 9-digits long.
FACILITY COUNTY CODE	Numeric or an error will occur.
FACILITY STATE CODE	2-characters long.
FACILITY HEALTH DISTRICT	Numeric or an error will occur.
PHYSICIAN SSN	Numeric and be 9-digits long or an error will occur.
PHYSICIAN HEALTH DISTRICT	Numeric or an error will occur.
CPT VACCINE CODE	Numeric or an error will occur.
CDC VACCINE CODE	Numeric or an error will occur.
SIIS VACCINE CODE	Numeric or an error will occur.
IMMUNIZATION DATE	Formatted correctly Cannot be a future date Cannot be before the patient's birth date.
HISTORICAL FLAG	Must have a Y or N for its value.
VACCINATION HEALTH DISTRICT	Numeric or an error will occur.
VIS PUBLICATION DATE1	Formatted correctly.
VIS PUBLICATION DATE2	Formatted correctly.
VIS PUBLICATION DATE3	Formatted correctly.
VIS PUBLICATION DATE4	Formatted correctly.
VIS FORM GIVEN DATE	Formatted correctly.

FIELD	VALUE MUST BE ….
DELETION DATE	Formatted correctly.
CONTRAINDICATION VACCINE CODE	Numeric or an error will occur.
CONTRAINDICATION CODE	Numeric or an error will occur.
LEAD SAMPLE DRAW DATE	Formatted correctly Cannot be a future date Cannot be before the patient's birth date.
LEAD SAMPLE ANALYZED DATE	Formatted correctly. Cannot be before the Lead Sample Draw Date. Cannot be before the patient's birth date.
LEAD RESULT REPORTED DATE	Formatted correctly. Cannot be before the patient's birth date.
PATIENT'S BIRTH DATE	Formatted correctly Cannot be a future date
PATIENT SSN	Numeric and be 9-digits long.
PATIENT ZIP CODE	Numeric and be either 5 or 9-digits long or an error will occur.
PATIENT COUNTY CODE	Numeric or an error will occur.
PATIENT PHONE EXTENSION	Numeric or an error will occur.
PATIENT HEALTH DISTRICT	Numeric or an error will occur.
GUARDIAN SSN	Numeric and be 9-digits long.
GUARDIAN WORK PHONE	Numeric and be 10-digits long.
PATIENT PHONE NUMBER	Numeric or an error will occur.
PATIENT FAX NUMBER	Numeric or an error will occur.
PHYSICIAN PHONE	Numeric or an error will occur.

FIELD	VALUE MUST BE ….
NUMBER	
FACILITY PHONE NUMBER	Numeric or an error will occur.
MEDICAL RECORD NUMBER	Entered for a Patient Record and a Vaccination Record.
PATIENT FIRST NAME	Entered for a Patient Record. Cannot contain the characters '%', '_', or '?'.
PATIENT LAST NAME	Entered for a Patient Record. Cannot contain characters '%', '_', or '?'.
PATIENT BIRTH DATE	Entered for a Patient Record.
MOTHER MAIDEN NAME OR STREET ADDRESS/ZIP CODE OR **STREET ADDRESS/CITY**	One of these fields must be entered for a Patient Record.
VACCINE CODE	Entered for a Vaccination Record.
IMMUNIZATION DATE	Entered for a Vaccination Record.
FACILITY ID	Entered for a Facility Record.
PATIENT DEMOGRAPHIC RECORD	Valid for a Lead Record Valid for a Contraindication Record.
PHYSICIAN ID	Entered for a Physician Record.
LOT NUMBER	Value must match lot numbers in the inventory for the current IRMS and/or facility.
LOT NUMBER	Value should not be blank if decrementing from inventory.
MANUFACTURER CODE	Value should not be blank if decrementing from inventory.
BIRTH STATE CODE	Value must be 2-characters long.
PATIENT STATE CODE	Value must be 2-characters long.
CONTRAINDICATION	Formatted correctly or an error will occur.

FIELD	VALUE MUST BE ….
DELETION DATE	
PERMANENT CONTRAINDICATION FLAG	Values must be Y or N.

VACMAN UPLOAD

This option is used to import the vaccine file. The SIIS Administrator must set the VACMAN UPLOAD PATH in the Administration Properties file, and the USER must have VacMan Upload Permissions.

To import a VacMan file, perform the following:

1. From the **IMPORTS** menu, click on the **VACMAN UPLOAD** option. The "VacMan Upload" window appears.

Figure 15-21: VacMan Upload

2. Either type the file name or click the **BROWSE** button to locate your file. Double-click the file name. The filename and path will display in the **SELECT FILE** field.
3. Click one of the available buttons:
   - **UPLOAD** – to begin the import process to the SIIS Webserver. This may take a few moments/minutes depending on the size of the file. During this time, your browser may seem to be stuck waiting; However, it is just waiting until the file import has been completed. Please do NOT click the browser "Stop" button unless you wish to cancel the file import. Upon completion a confirmation message

appears at the top of the window, "Your file has been uploaded."

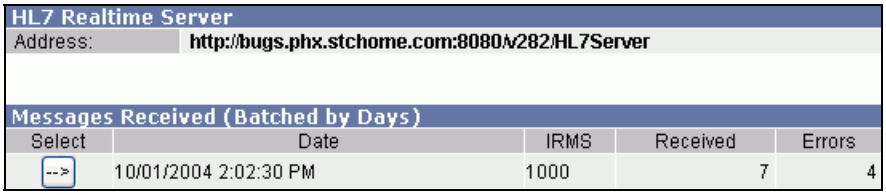
- **CLEAR** – to erase the file name from the **SELECT FILE** field.

HL7 REALTIME IMPORTS

This option allows HL7 records to be imported in real time.

1. From the **IMPORTS** menu, click the **HL7 REALTIME** option. The "HL7 Realtime Server" window appears.

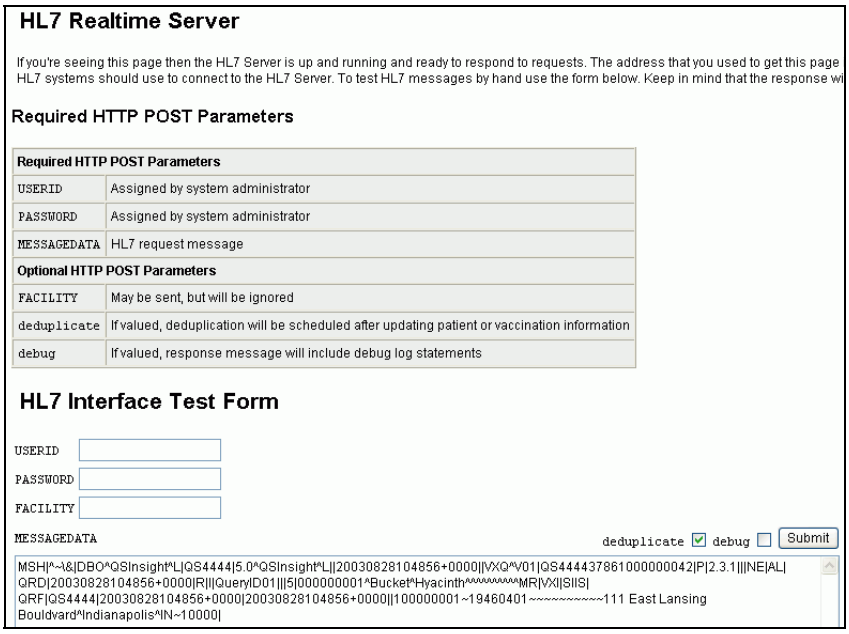
Figure 15-22: HL7 Realtime Server



2. This window is divided into two sections: Address and Messages Received (Batched by Days).

3. If you want to view the HL7 Realtime Server's details, click on the **ADDRESS** Link. The HL7 Realtime Server window appears.

Figure 15-23: HL7 Realtime Server Details



4. If you want to view the "Messages Received," click on the **SELECT** arrow (to the left of the date).

Figure 15-24: HL7 Realtime Messages Received, Rejected, and Accepted

HL7 Realtime Server

Address:	http://bugs.phx.stchome.com:8080/testing/HL7Server

Batch Messages Received

Date	12/06/2004 11:28:16 AM
IRMS	1000
Total Received:	5
Total Errors:	0

Messages Rejected:

Select	Time	Received	Reply	Remote User	Description

Messages Accepted:

Select	Time	Received	Reply	Remote User	Description
-->	11:27:35 AM	VXQ	VXX	STC	2 possible matches
-->	11:27:49 AM	VXQ	VXR	STC	Exact match
-->	11:27:52 AM	VXQ	VXR	STC	Exact match
-->	11:28:05 AM	VXQ	VXX	STC	2 possible matches
-->	11:28:16 AM	VXQ	VXR	STC	Exact match

Messages Received (Batched by Days)

Select	Date	IRMS	Received	Errors
-->	12/06/2004 11:28:16 AM	1000	5	0

5. To view the **MESSAGES ACCEPTED** or **RECEIVED**, click on the **SELECT** arrow. The respective window appears.

Figure 15-25: Received Message Detail

Received Message Detail

Received:	12/06/2004 11:27:49 AM
Response Text:	Exact match
Message Received:	
Message Sent:	

Cancel

6. Click the **CANCEL** button when you are finished.

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16 EXPORTS MENU

The **EXPORTS MENU** allows Immunization Registry users to send (export also referred to as download) patient information files (patient demographics, vaccinations, facilities, Physician/Vaccinator, and Lead data) that eventually will be imported to Provider Billing/Patient Management Systems.

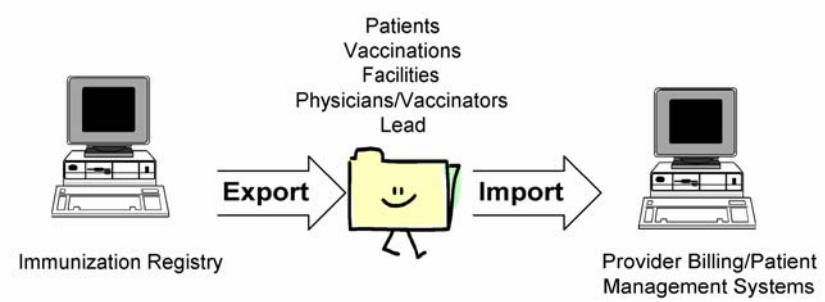
The following types of exports are available:

- DTT
- Medicare
- Remote Clinic
- VacMan

DTT EXPORT

The **DTT Export** is accessible to users who have the DTT Import module.

Figure 16-1: DTT Export Process



It allows users to export files in a format based upon a DTT profile. Exports can be limited by IRMS, Facility/Facility Group, Patient Birth Date or Date Range based on the "update" stamp.

DATA ASSUMPTIONS AND COMBINATIONS

The Export makes assumptions about the relationship of the data based on the types of data fields defined in the DTT profile. The DTT can handle data in the following categories:

- Patient
- Vaccination
- Physician
- Facility
- Lead

The data that is returned is based on the data combination retrieved. For example, if the profile contained patient first name, patient last name, vaccination code, vaccination date, the combination data would be Patient - Vaccination. Data Combinations are shown in the table below. Any data combination not listed in the table will not return information from the SIIS database.

Note: The term "Selected IRMS" in the table below refers to the user's IRMS (or selected IRMS when that is an option for the user such as Registry Client). All data returned is always filtered by the selected IRMS.

DATA / DATA COMBINATION	DATA DESCRIPTION	FILTERING BY INFORMATION
PATIENT DATA	Patient data for the selected IRMS.	Filtering by update date is always the last date the **patient** information was changed.

DATA / DATA COMBINATION	DATA DESCRIPTION	FILTERING BY INFORMATION
PATIENT-FACILITY DATA	Patient and facility data associated with the patient for the selected IRMS.	Filtering by update date is always the last date the **patient** information was changed.
PATIENT – LEAD DATA	Patient and the Lead data associated with the patient for the selected IRMS	Filtering by update date is always the last date the **lead** information was changed.
PATIENT – LEAD – FACILITY DATA	Patient date, lead data associated with the patient, and the facility data associated with the lead results for the selected IRMS	Filtering by update date is always the last date the **lead** information was changed.
PATIENT – PHYSICIAN DATA	Patient and the physician data associated with the patient for the selected IRMS	Filtering by update date is always the last date the **patient** information was changed.
PATIENT – PHYSICIAN – FACILITY DATA	Patient data, facility data associated with the patient, and they physician data associated with the patient for the selected IRMS	Filtering by update date is always the last date the **patient** information was changed.
PATIENT – VACCINATION DATA	Patient and the vaccination data associated with the patient for the selected IRMS	Filtering by update date is always the last date the **vaccination** information was changed.
PATIENT – VACCINATION – FACILITY DATA	Patient data, vaccination data associated with the patient, and the facility data associated with the vaccination for the selected IRMS.	Filtering by update date is always the last date the **vaccination** information was changed.

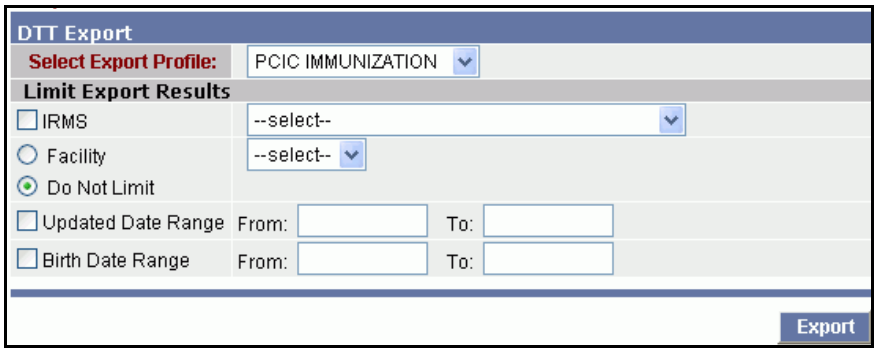
DATA / DATA COMBINATION	DATA DESCRIPTION	FILTERING BY INFORMATION
PATIENT – VACCINATION – PHYSICIAN DATA	Patient data, vaccination data associated with the patient, and the physician data associated with the vaccination for the selected IRMS.	Filtering by update date is always the last date the **vaccination** information was changed.
VACCINATION – PHYSICIAN DATA	Vaccination data associated with the patient, and the physician data associated with the vaccination for the selected IRMS	Filtering by update date is always the last date the **vaccination** information was changed. Note: Filtering by birth date is ignored.
VACCINATION – PHYSICIAN – FACILITY DATA	Vaccination data, the physician data associated with the vaccination, and the facility data associated with the vaccination for the selected IRMS.	Filtering by update date is always the last date the **vaccination** information was changed. Note: Filtering by birth date is ignored.
VACCINATION – FACILITY DATA	Vaccination data and facility data associated with the vaccination for the selected IRMS.	Filtering by update date is always the last date the **vaccination** information was changed. Note: Filtering by birth date is ignored.
VACCINATION DATA	Vaccination data for the selected IRMS.	Filtering by update date is always the last date the **vaccination** information was changed. Note: Filtering by birth date is ignored.

DATA / DATA COMBINATION	DATA DESCRIPTION	FILTERING BY INFORMATION
PHYSICIAN DATA	Physician data for the selected IRMS.	Filtering by update date is always the last date the **physician** information was changed. Note: Filtering by birth date is ignored.
FACILITY DATA	Facility data for the selected IRMS.	Filtering by update date is always the last date the **facility** information was changed. Note: Filtering by birth date is ignored.

1. From the **EXPORTS** menu, point and click on the **DTT** option. The "DTT Export" window appears.

Note: Depending on your user id (permissions), the limitations (filtering options) may vary.

Figure 16-2: DTT Export



2. Click the drop-down arrow and select an **EXPORT PROFILE**.

3. If you want to **limit the Export Results**, click/select any of the following fields/buttons:

Table 16-1: Limit Export Result Fields

FIELD/BUTTON	DESCRIPTION
IRMS	IRMS refers to the user's IRMS (or selected IRMS when that is an option for the user such as Registry Client). All data returned is always filtered by the selected IRMS.
FACILITY OR **DO NOT LIMIT**	Facility refers to the user's Facility or the alternative is to Not Limit the results.
UPDATED DATE RANGE	Limits the results by entering a specific UPDATE date range. Type a FROM and TO date using the format mmddyyyy.
BIRTH DATE RANGE	Limits the results by entering a specific BIRTH DATE range. Type a FROM and TO date using the format mmddyyyy.

4. Click the **EXPORT** button. The "results" will appear in a "text" file (sample shown).

Figure 16-3: Text File Result Sample

```
|CHRIS_FC|3|123|||12/01/0002|AB|SIISCLIENT1|324508520||||MARCIA||4013||BOB
|DOE|20||||||||||SIISCLIENT1|SIISCLIENT1||2004-01-08
06:41:39.0||85012|4013||||1990-03-01 00:00:00.0
|CHRIS_RC|3|123|||12/01/0002|AB|SIISCLIENT1|||||MARCIA||||JOHN|SMITH|20|||
||1|12/01/0002|||||SIISCLIENT1|SIISCLIENT1||2004-01-08
06:41:43.0||85012|4013|1|||1990-03-01 00:00:00.0
|CHRIS_RC||321|||12/01/0002|MSD|SIISCLIENT1|||||MARCIA||||JOHN|SMITH|21|||
||1|12/01/0002||||||SIISCLIENT1||2004-01-08
06:41:43.0||85012|4013|1|||1991-01-01 00:00:00.0
|CHRIS_RC|||||12/01/0002||SIISCLIENT1|||||MARCIA||||JOHN|SMITH|3|||||1|12/
01/0002||||||SIISCLIENT1||2004-01-08 06:41:43.0||85012|4013|1|||1991-01-01
00:00:00.0
|CHRIS_FC|||||12/01/0002||SIISCLIENT1|324508520||||MARCIA||4013||BOB|DOE|1
00||||||||||||SIISCLIENT1||2004-01-08 06:41:39.0||85012|4013||||1990-01-01
00:00:00.0
|CHRIS_FC|||||12/01/0002||SIISCLIENT1|324508520||||MARCIA||4013||BOB|DOE|1
00||||||||||||SIISCLIENT1||2004-01-08 06:41:39.0||85012|4013||||1990-02-01
00:00:00.0
```

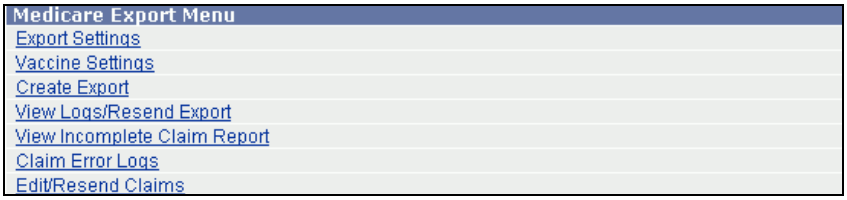
5. Save the text file to your desktop.

MEDICARE EXPORT

The **Medicare** option allows Medicare providers to submit their exports.

1. From the **EXPORTS** menu, point and click on the **MEDICARE** option. The "Medicare Export Menu" appears.

Figure 16-4: Medicare Export Menu



2. Point and click the option coinciding with the action you need to perform and continue to the respective section for instructions:

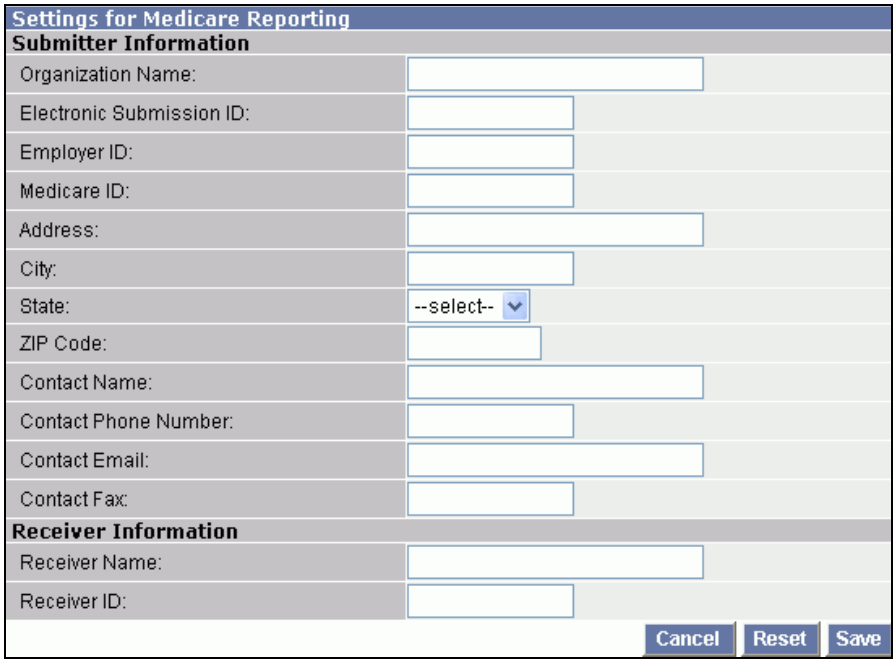
- Export Settings
- Vaccine Settings
- Create Export
- View Logs/Resend Export
- View Incomplete Claim Report
- Claim Error Logs
- Edit/Resend Claims

EXPORT SETTINGS

Used to set up the submitting and receiving information for the Medicare Export.

1. From the Medicare Export Menu, point and click the **EXPORT SETTINGS** option. The "Settings for Medicare Reporting" window appears.

Figure 16-5: Settings for Medicare Reporting



2. Refer to the table for a list of the fields and descriptions:

Table 16-2: Settings for Medicare Reporting Fields

FIELD	DESCRIPTION
SUBMITTER INFORMATION	
ORGANIZATION NAME	Name of the Export Submitter's Organization.
ELECTRONIC SUBMISSION ID	Identifying number of the electronic submission.
EMPLOYER ID	Identifying number of the Employer.
MEDICARE ID	Identifying number associated with Medicare.
ADDRESS	Address of the Submitter's Organization.
CITY	City corresponding to the address of the Submitter's Organization.
STATE	Sate corresponding to the city of the Submitter's Organization.
ZIP CODE	Zip Code corresponding to the city of the Submitter's Organization.

FIELD	DESCRIPTION
CONTACT NAME	Name of the person that can be contacted at the Submitting site.
CONTACT PHONE NUMBER	Phone number of the contact person that can be called at the Submitting site.
CONTACT EMAIL	Email address of the contact person at the Submitting site.
CONTACT FAX	Facsimile number of the contact person at the Submitting site.
RECEIVER INFORMATION	
RECEIVER NAME	Name of the person receiving the submittal.
RECEIVER ID	Identifying number of the receiver.
VACCINE REIMBURSEMENT RATE	
INFLUENZA NASAL SPRAY	Rate of the reimbursement for the vaccine.
INFLUENZA SPLIT	Rate of the reimbursement for the vaccine.
PNEUMONIA PPV23	Rate of the reimbursement for the vaccine.
INFLUENZA SPLIT (36 MONTHS AND OLDER)	Rate of the reimbursement for the vaccine.

3. Enter as much information as you can and click one of the available buttons:

- **RESET VALUES** – erases any newly entered text back to the way it was saved previously.
- **SAVE VALUES** – saves the newly entered text.

VACCINE SETTINGS

Used to set up the submitting and receiving vaccine information for the Medicare Export

1. From the Medicare Export Menu, point and click the **VACCINE SETTINGS** option. The "Settings for Medicare Reporting" window appears.

Figure 16-6: Medicare Vaccine Settings

Medicare Vaccine Settings

Create New | Return to Menu

		Billing Amount		ICD-9 Code		CPT Code		Effective Dates	
Edit	Vaccine Name	for Vaccine	Admin	for Vaccine	Admin	for Vaccine	Admin	Start	End
-->	DTaP	10.0	61.0	6501	1650	106516	6501651	01/01/2001	06/01/2006
-->	Pneumococcal (PPV23)	10.0	15.0	65046	6504654	6549480	9849870	01/01/2002	05/05/2006

2. The fields and their descriptions are listed in the table:

Table 16-3: Medicare Vaccine Settings Field Descriptions

FIELD	DESCRIPTION
VACCINE REIMBURSEMENT RATE	
VACCINE NAME	Name of the vaccine.
BILLING AMOUNT **FOR VACCINE** **ADMINISTRATION**	Two different amounts for the vaccine itself as well as the administration.
ICD-9 CODE **FOR VACCINE** **ADMINISTRATION**	ICD-9 Codes for the Vaccine as well as the administration.
CPT CODES **FOR VACCINE** **ADMINISTRATION**	Codes for the vaccine itself as well as the administration.
EFFECTIVE DATES **START** **END**	When the rates are in effect; beginning (Start) and ending (End) date.

3. Click one of the available buttons:

- **CREATE NEW** – to create a new Medicare Vaccine Settings. The "X12 Vaccine Medicare Settings [Edit]" window appears. Continue to the section titled, "Creating/Editing Medicare Vaccine Settings."

- **RETURN TO MENU** – exits to the "Medicare Export Menu."
- **SELECT ARROW** – selects the vaccine and displays it in the "X12 Vaccine Medicare Settings [Edit]" window. Continue to the section titled, "Creating/Editing Medicare Vaccine Settings."

CREATING/EDITING MEDICARE VACCINE SETTINGS

To **CREATE** a **NEW** or **EDIT** an **EXISTING** Medicare Vaccine Setting, perform the following:

1. Perform one of the following depending on whether you are creating or editing:
   - If Creating a new Medicare Vaccine Setting, click the **CREATE NEW** button on the "Medicare Vaccine Settings" window.
   - If editing an existing Medicare Vaccine Setting, click the **SELECT ARROW** beside the Vaccine you want to edit.
2. The "X12 Medicare Vaccine Setting" window appears:

Figure 16-7: X12 Medicare Vaccine Settings [Edit]

X12 Medicare Vaccine Settings [Edit]	
Vaccine	
Name:	DTaP
Billing Amount	
for Vaccine:	$ 10.0
for Administration:	$ 61.0
ICD-9 Code	
for Vaccine:	6501
for Administration:	1650
CPT Code	
for Vaccine:	106516
for Administration:	6501651
Effective Date	
Start Date (MM/DD/YYYY):	01/01/2001
End Date (MM/DD/YYYY):	06/01/2006
	Cancel Reset Delete Save

3. Refer to the previous table for a list of field descriptions.
4. When finished, click one of the available buttons:

- **CANCEL** – Returns to the "Medicare Vaccine Settings" window without saving any changes
- **RESET** – Erases any entries made since the last SAVE and remains on the window to re-enter data.
- **DELETE** – **Immediately** deletes the Vaccine and returns to the "Medicare Vaccine Settings" window.
- **SAVE** – Saves changes made and returns to the " " window.

CREATE EXPORT

This option is used to **create** the **EXPORT** and/or **resubmit** incomplete claims.

1. From the Medicare Export Menu, point and click the **CREATE EXPORT** option. The "Export to Medicare" window appears.

Figure 16-8: Export to Medicare

2. Type the **FROM** and **TO** dates using the format mmddyyyy for the **EXPORT DATE RANGE**.
3. Click one of the available buttons:
   - **BACK** – to return to the "Medicare Export Menu."
   - **RESET** – to erase any newly typed text entries and remain on the window.
   - **CREATE EXPORT FILE** – to create a new export file and display in another window.
   - **RESUBMIT INCOMPLETE CLAIMS** – to resend incomplete claims.

VIEW LOGS / RESEND EXPORT

This option is used to view previously sent exports and also to resend one.

1. From the Medicare Export Menu, point and click the **VIEW LOGS / RESEND EXPORT** option. The "Medicare Export Logs" window appears.

Figure 16-9: Medicare Export Logs

Medicare Export Logs

Export Date	From Date	To Date	Total Records	State	Mark Received	Mark Rejected	Resubmit Export
2004-01-08			0	Sent	-->	-->	
2004-01-08			0	Sent	-->	-->	
2004-01-08			0	Sent	-->	-->	
2004-01-08			0	Sent	-->	-->	
2004-01-08			0	Sent	-->	-->	
2004-01-08			0	Sent	-->	-->	
2004-01-08			0	Sent	-->	-->	
2004-01-08			0	Sent	-->	-->	
2004-01-08			0	Sent	-->	-->	
2004-01-08			0	Sent	-->	-->	
2004-01-08	2003-01-01	2004-01-01	0	Sent	-->	-->	-->
2004-01-08	2003-01-01	2004-01-01	0	Sent	-->	-->	-->
2004-01-08			0	Sent	-->	-->	
2004-01-08			0	Sent	-->	-->	

2. The information and fields are described in the table:

Table 16-4: Medicare Export Logs Column Descriptions

COLUMN	DESCRIPTION
EXPORT DATE	Date the Export was submitted.
FROM DATE	Date Range "start date" entered when the Export was created/submitted.
TO DATE	Date Range "end date" entered when the Export was created/submitted.
TOTAL RECORDS	Number of records that were submitted.

COLUMN	DESCRIPTION
STATE	Status of the export submittal. Statuses are: • Sent • Accepted • Error
MARK RECEIVED	A symbol in this column indicates the Export file was received.
MARK REJECTED	A symbol in this column indicates the Export file was rejected.
RESUBMIT EXPORT	A symbol in this column indicates the Export File was resubmitted. Click on the symbol to display the file.

3. Click the **BACK** button to return to the "Medicare Export Menu."

VIEW INCOMPLETE CLAIM REPORT

This option is used to view the Incomplete Claim Reports. The Last Name, First Name, Birth Date, and Missing Information will display in a report.

1. From the Medicare Export Menu, point and click the **VIEW INCOMLETE CLAIM REPORT** option. The "Incomplete Claims by Facility" report displays.

Figure 16-10: Incomplete Medicare Claim Report

Incomplete Claims by Facility

Report Date: January 8, 2004

Last Name	First Name	Birth Date	Missing Information

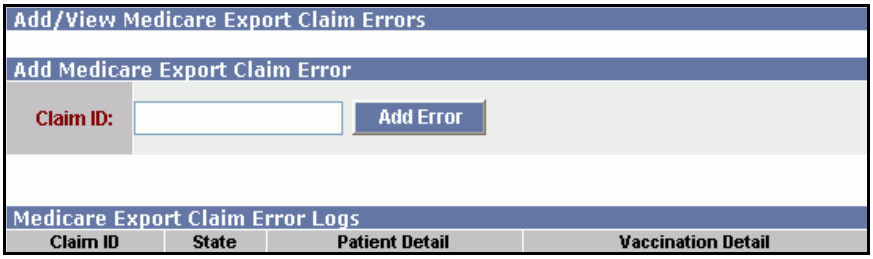
2. Press the **IE BACK** key to return to the "Medicare Export Menu."

CLAIM ERROR LOGS

This option is used to view the errors in the Claim Logs.

1. From the Medicare Export Menu, point and click the **CLAIM ERROR LOGS** option. The "Add/View Medicare Export Claim Errors" window appears.

Figure 16-11: Medicare - Claim Error Logs



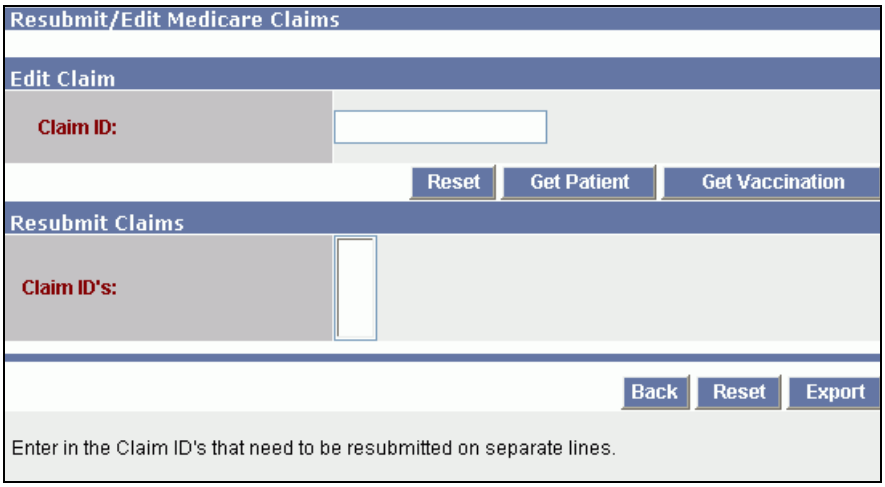
2. Type the claim ID in the **CLAIM ID** field and click the **ADD ERROR** button. The Claim ID, State, and Details will appear.

EDIT/RESEND CLAIMS

This option is used to edit and resend claims.

1. From the Medicare Export Menu, point and click the **EDIT/RESEND CLAIMS** option. The "Resubmit/Edit Medicare Claims" window appears.

Figure 16-12: Resubmit/Edit Medicare Claims



2. Decide whether you are going to edit or resubmit a claim and perform the necessary steps.

   - **Edit Claim** – Type the claim ID in the "Edit Claim" section of the window and click one of the buttons:

     a) **GET PATIENT** – retrieves the patient associated with the claim id entered.

     b) **GET VACCINATION** – retrieves the vaccination associated with the claim id entered.

     c) **RESET** – erases any newly entered claim ids.

   - **Resubmit Claims** –Type each claim id on its own line, use the ENTER key to insert a line return and position the cursor on the next line, and then click one of the buttons:

     a) **BACK** – returns to the "Medicare Export Menu."

     b) **RESET** – erases any newly typed claim id(s) and remains on the same window to re-enter date.

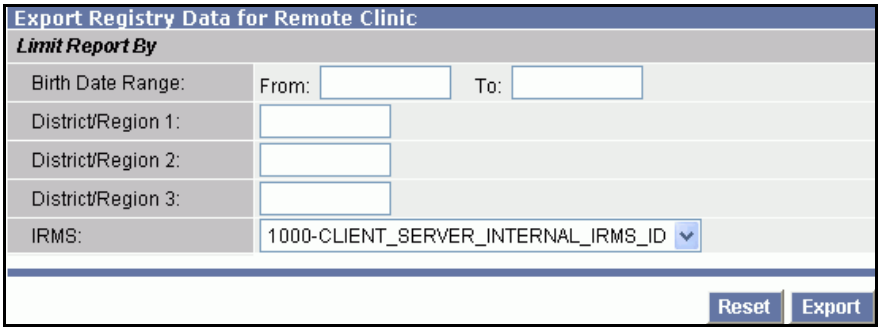
     c) **EXPORT** – sends the claim id(s) entered.

REMOTE CLINIC EXPORTS

This option is used to export registry data for the Remote Clinic application.

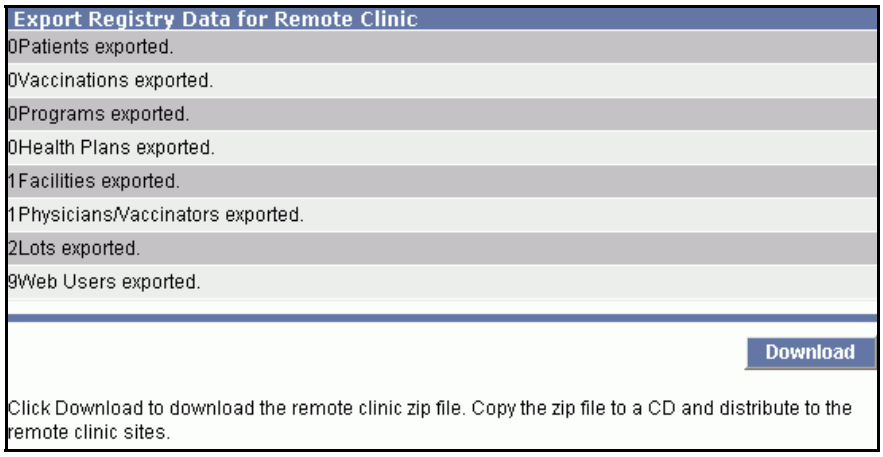
1. From the **EXPORTS** menu, point and click on the **REMOTE CLINIC** option. The "Export Registry Data for Remote Clinic" window appears.

Figure 16-13: Export Registry Data for Remote Clinic



2. In the **BIRTH DATE RANGE** field, type the **FROM** and **TO** date ranges using the mmddyyyy format to limit the export. Click the TAB key.
3. If you want to limit the export by **DISTRICT/REGION**, up to three different districts/regions can be entered.
4. Point and click the drop-down to select the **IRMS.**
5. Click one of the available buttons:
   - **RESET** – to erase any newly entered text or selections.
   - **EXPORT** – displays the "Export Registry Data for Remote Clinic – **DOWNLOAD**" window.

Figure 16-14: Export Registry Data for Remote Clinic



   - Click the **DOWNLOAD** button to download the file into a "zip" file.
   - **Copy** the **Zip file** to a **CD** and distribute to the Remote Clinic sites.

VACMAN EXPORT

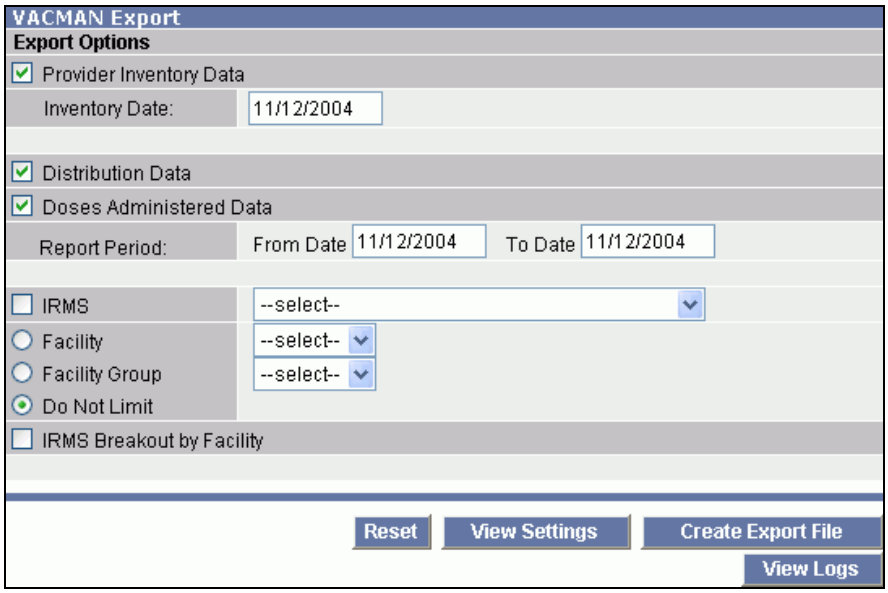
This option is used to **EXPORT** registry data from the **VACMAN** application.

Upon export, files will automatically be zipped to allow for easy transport (FTP, Email, etc.). If no records are found for the export, an export file will not be generated. Export files will be generated in **TEXT** (TXT) format.

Note: Only users with VACMAN Export Permissions will be able to run the export.

1. From the **EXPORTS** menu, point and click on the **VACMAN EXPORT** option. The "VACMAN Export Menu" window appears.

Figure 16-15: VacMan Export Menu



2. The checkbox and radio button options are listed in the table:

Table 16-5: VacMan Export Options

OPTIONS	DESCRIPTION
PROVIDER INVENTORY DATA	If the checkbox is checked, the "Provider Inventory" data is retrieved for the export for the INVENTORY DATE you specify. The inventory date defaults to today's date. Type a new date if desired on top of the default date. Note: Usually the last day of the month or quarter is used. The Export File Name is: Provhas.txt
DISTRIBUTION DATA	If the checkbox is checked, the "Distribution" data is retrieved for the export. This includes vaccine distributions to providers, vaccines returned by providers, and vaccines reported as wasted by providers for a specific time period. The Export File Name is: Distrib.txt
DOSES ADMINISTERED DATA	If the checkbox is checked, the "Doses Administered" data is retrieved for the export for the REPORT PERIOD specified. The "From" and "To" date fields will default to today's date. If desired, type new dates on top of the FROM and TO dates. The Export File Name is: Dosesadm.txt
IRMS	Click the drop-down menu arrow to view/select a valid IRMS. The checkbox will automatically get checked after you make a selection. Check the checkbox again to deselect the choice.
FACILITY / FACILITY GROUP / DO NOT LIMIT	Click the drop-down menu arrow to select a Facility or Facility group, or leave the Do Not Limit radio button selected. If you select a Facility or Facility Group, the radio button will automatically get selected. Click the Do Not Limit radio button to remove the Facility or Facility Group selection.
IRMS BREAKOUT BY FACILITY	If this checkbox is checked, the IRMS numbers will be separated or grouped by Facility name.

3. Choose the **EXPORT OPTIONS** by clicking in one of the checkboxes or radio buttons and then click one of the available buttons:
   - **RESET** – to erase any newly entered text or selections.
   - **VIEW SETTINGS** – displays the "VACMAN Export Settings" window for viewing purposes only. Continue to the section titled, "Viewing the VacMan Settings."
   - **CREATE EXPORT FILE** – displays the "VACMAN Export Report" window offering a summary of the Export Settings, options chosen, and report (if any). Continue to the section titled, "Creating the Export File."
   - **VIEW LOGS** – displays a history of "created" export files. Continue to the section titled, "Viewing Export File Logs."

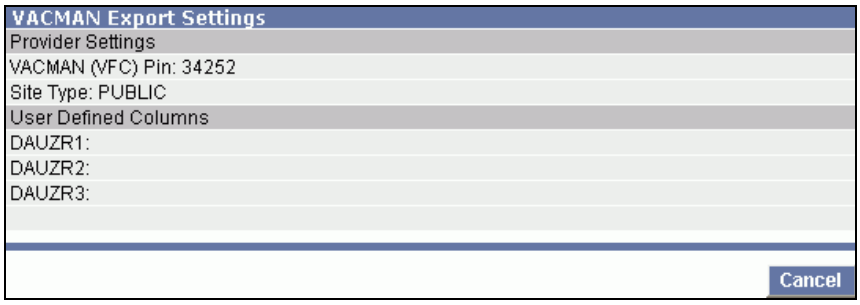
VIEWING VACMAN SETTINGS

The VacMan Settings are created by the SIIS Administrator. If a VFC Pin number is required, a message will appear at the top of the window.

To view the VacMan Export Settings, perform the following:

1. From the **EXPORTS** menu, point and click on the **VACMAN EXPORT** option. The "VACMAN Export" window appears.
2. Click the **VIEW SETTINGS** button. The "VacMan Settings" window appears.

Figure 16-16: VacMan Export Settings



3. Click the **CANCEL** button to return to the "VacMan Export Menu."

CREATING THE EXPORT FILE

After creating an Export File, assuming records are found, you have the opportunity to edit the file.

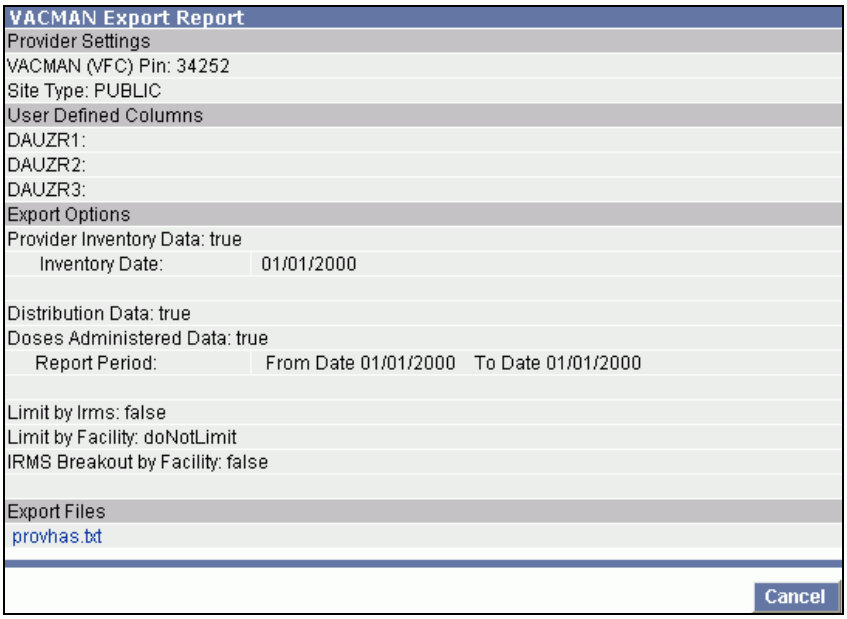
To create a VacMan Export File, perform the following:

1. From the **EXPORTS** menu, point and click on the **VACMAN EXPORT** option. The "VACMAN Export menu" window appears.
2. Choose the desired **EXPORT OPTIONS**. Refer to

Table 16-5: VacMan Export Options for a description of the options.

3. Click the **CREATE EXPORT FILE** button. The "VacMan Export Report" window appears.

Figure 16-17: VacMan Export Report


VACMAN Export Report
Provider Settings
VACMAN (VFC) Pin: 34252
Site Type: PUBLIC
User Defined Columns
DAUZR1:
DAUZR2:
DAUZR3:
Export Options
Provider Inventory Data: true
Inventory Date: 01/01/2000
Distribution Data: true
Doses Administered Data: true
Report Period: From Date 01/01/2000 To Date 01/01/2000
Limit by Irms: false
Limit by Facility: doNotLimit
IRMS Breakout by Facility: false
Export Files
provhas.txt
Cancel

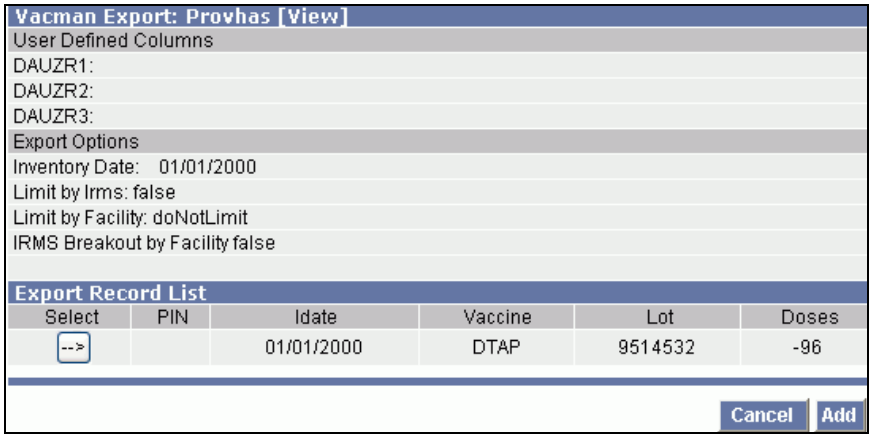
4. Click either the **CANCEL** button to return to the "VacMan Export Menu" or the **EXPORT FILE'S** Hyperlink to view/edit the records. If Viewing/Editing the records, continue to the section titled, "Viewing/Editing Export File Records."

VIEWING THE EXPORT FILE'S RECORDS

This option is only available from the "VacMan Export Report" window when an Export File has been created.

1. From the **EXPORTS** menu, point and click on the **VACMAN EXPORT** option. The "VACMAN Export Report" window appears.
2. Choose the **EXPORT OPTIONS** by clicking in one of the checkboxes or radio buttons and then clicking the **CREATE EXPORT FILE** button. The "VacMan Export Report" window appears.
3. In the **EXPORT FILES** section of the "VacMan Export Report" window, click on the **EXPORT TEXT** File's hyperlink. The "Vacman Export [Text File Name} View" window appears with the Export Options at the top of the window.

Figure 16-18: VacMan Export : Provhas - View



4. In the **EXPORT RECORD LIST** section, each record within the file will be listed.

5. Click one of the buttons:

- **SELECT** – to select the record to display the "VacMan Export [Text File Name] – EDIT" window. Continue to the section titled, "Editing an Export File's Record."
- **CANCEL** – to return to the "VacMan Export Report Menu."
- **ADD** – to display the "VacMan Export [Text File Name] – Edit" window to add a new record to the export file. Continue to the section titled, Adding an Export File Record.

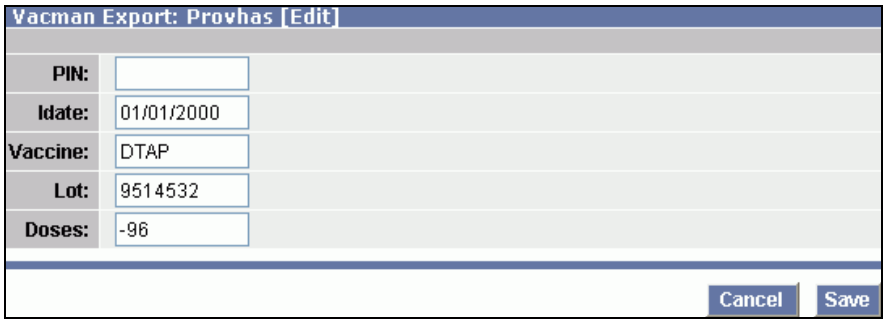
EDITING AN EXPORT FILE'S RECORD

To edit an Export File's Records, perform the following:

1. Follow the instructions listed above in the section titled, "Viewing the Export File's Records."

2. In the **EXPORT RECORD LIST**, click on the **SELECT ARROW** to the left of the record you want to edit. The "Vacman Export: [Text File Name] – Edit" window appears.

Figure 16-19: VacMan Export - Edit



3. The fields and their descriptions are listed in the table for each file name:

Table 16-6: VacMan Export Edit/Add Field Descriptions

FIELD	FILE NAME.TXT			DESCRIPTION
	PROVHAS	DISTRIB	DOSESADM	
PIN	X	X	X	Provider Identification Number.
IDATE	X			Date the inventory was done, usually the last day in a month or quarter (02/28/xx or 12/31/xx). The date 01/01/01 is valid only as an initial inventory date, not as a periodic inventory date.
VACCINE	X	X	X	Short name for the vaccine types.
LOT	X	X	X	Manufacturer's Lot Number for the Vaccine. Providers may report inventory by lot number or by vaccine type.
DOSE(S)	X	X	X	Number of Doses reported in inventory for this date and vaccine type.
INPUT		X		Date the record is entered into the database. This can be earlier or later than the date of shipment.
DATEOUT		X		This date can be any of the following: • Date the shipment is actually

FIELD	FILE NAME.TXT			DESCRIPTION
	PROVHAS	DISTRIB	DOSESADM	
				shipped to the provider. • Date the vaccine is returned • Date vaccine is reported spoiler, expired, or lost/damaged. • Date the vaccine is transferred • Date the vaccine order is transmitted.
ACTION		X		Action code to identify the type of transaction. Codes are: • 1 – Vaccine sent from the project to a provider • 2 – Usable vaccine returned by the provider • 3 – Vaccine spoiled for a reason other than improper storage upon receipt or refrigerator failure. • 4 – Expired vaccine • 5 – Vaccine was lost or damaged during shipment to the provider • 6 – Vaccine was improperly stored upon receipt and spoiled. • 7 – Refrigerator failed and the vaccine spoiled. • 8 – Usable vaccine transferred from one provider to another. • 11 – Vaccine was lost or cannot be accounted for in the provider inventory. • 12 – Vaccine was not usable for some reason other than spoiled,

FIELD	FILE NAME.TXT			DESCRIPTION
	PROVHAS	DISTRIB	DOSESADM	
				expired, or lost/damaged.
FDOSE1		X		Number of doses assigned to VFC funds.
FDOSE2		X		Number of doses assigned to G317 funds.
FDOSE3		X		Number of doses assigned to State/other funds.
ADATE			X	Last day of the period (such as month or quarter) being reported.
SECTOR			X	Code for vaccine sector type. Codes are: • 1 – Public provider doses • 2 – Private provider doses
G1				Number of doses administered to age category 1 (less than 1 year of age).
G2				Number of doses administered to age category 2 (1 year of age).
G3				Number of doses administered to age category 3 (2 years of age).
G4				Number of doses administered to age category 4 (3 – 4 years of age).
G5				Number of doses administered to age category 5 (5 years of age).
G6				Number of doses administered to age category 6 (6 - 9 years of age).
G7				Number of doses administered to age category 7 (10 - 14 years of age).
G8				Number of doses administered to age category 8 (15 - 19 years of age).
G9				Number of doses administered to age category 9 (20 – 24 years of age).

FIELD	FILE NAME.TXT			DESCRIPTION
	PROVHAS	DISTRIB	DOSESADM	
G10				Number of doses administered to age category 10 (25 – 44 years of age).
G11				Number of doses administered to age category 11 (45 – 64 years of age).
G12				Number of doses administered to age category 12 (65 years of age or greater).
G13				Number of doses administered to age category 13 (unknown age).
TOWTOT				Total number of doses administered for age categories 1-13.
DAUZR1				First optional user-defined field. This field is assigned using the User-Defined Names in the SIIS Administration module. This field can be used for project analysis in doses administered data and related reports.
DAUZR2				Second optional user-defined field. This field is assigned using the User-Defined Names in the SIIS Administration module. This field can be used for project analysis in doses administered data and related reports.
DAUZR3				Third optional user-defined field. This field is assigned using the User-Defined Names in the SIIS Administration module. This field can be used for project analysis in doses administered data and related reports.

4. Edit the necessary fields and then click on one of the available buttons:

- **CANCEL** – to not save any changes made and return to the "VacMan Export Report [Text File Name] – View" window.
- **SAVE** – to SAVE the changes made and return to the "VacMan Export Report [Text File Name] – View" window.

ADDING AN EXPORT FILE RECORD

To add an Export File Record to the Export File, perform the following:

1. Follow the instructions listed above in the section titled, "Viewing the Export File's Records."
2. Click on the **ADD** button. The "VacMan Export [Text File Name] – Edit" window appears. Refer to

Figure 16-19: VacMan Export - Edit to see a sample of the window.

3. The fields and their descriptions are listed in Table 16-6: VacMan Export Edit/Add Field Descriptions.

4. Fill in all the fields and then press one of the available buttons:

   - **CANCEL** – to not save any changes made and return to the "VacMan Export Report [Text File Name] – View" window.
   - **SAVE** – to SAVE the changes made and return to the "VacMan Export Report [Text File Name] – View" window.

17 REPORTS MENU

The **REPORTS MENU** is grouped into four separate modules:

- Patient Record
- Report Module
- State Reports
- Management Reports

The report will always display in the window first for you to decide whether you want to print it or not.

PATIENT RECORD

In order to obtain a Patient Record report, a patient search must be performed first.

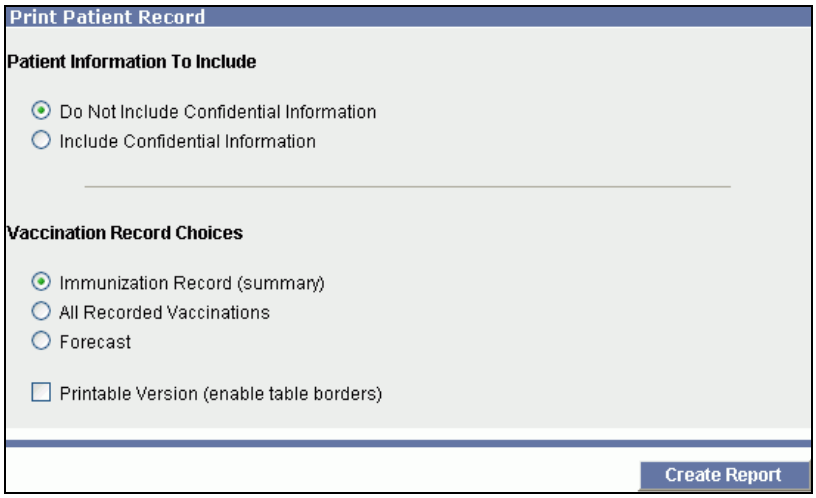
All childhood vaccines will appear.

Note: For Washington, a message will appear at the bottom of the report, “"If the above information contains errors or omissions, please contact your medical provider at the location indicated below: This report was generated on 11/22/00 by: clinic name, address, contact (name of user printing out the report). This report provided by the CHILD Profile Immunization Registry System."

1. From the **PATIENT** menu, point and click on the **SEARCH/ADD** option. The "Patient Search" window appears. Fill in the "search criteria" and click the **RUN SEARCH** button. The "Patient Search Results" window appears. Refer to the Patient Menu Search for detailed instructions.

2. From the **REPORTS** menu, point and click on the **PATIENT RECORD** option. The "Print Patient Record" limitation window appears.

Figure 17-1: Print Patient Record



3. In the **PATIENT INFORMATION TO INCLUDE** section, point and click on the radio button to either:
   - **Do Not Include Confidential Information** – (Confidential Information such as: SSN, Race, Ethnicity, Medicaid Number, Birth File Number, Address, Phone, District, Country/Parish)
   - **Include Confidential Information**
4. In the **VACCINATION RECORD CHOICES** section, point and click on the radio button to display and print respective report. The reports are:
   - **All Recorded Vaccinations** – Reveals a breakdown per vaccine name.
   - **Immunization Record (Summary)** – Reveals a Summary of Vaccine Families
   - **Forecast** – Reveals the Forecast or dates that were/are scheduled for each Vaccine.
5. If you want to print "table borders" around the report, click the **PRINTABLE VERSION (ENABLE TABLE BORDERS)** checkbox.

Regardless of the report chosen, each report will contain the same type of information at the top; however, the report title will be reflected in the second line.

Note: If the barcode font and application are not configured, a patient ID will display instead of a barcode label.

6. Point and click the **CREATE REPORT** button. The report will display and be available for you to print. Report samples can be located on the next three pages.

PATIENT RECORD—ALL RECORDED VACCINATIONS

This report reveals a breakdown per vaccine name and PPD, if entered. The illustration shown excludes confidential information.

Note: If the barcode font and application are not configured, a patient ID will display instead of a barcode label.

Figure 17-2: Patient Record – All Recorded Vaccinations

Patient Vaccination Record

All Recorded Vaccinations

IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Facility:
Date: September 22, 2005

Patient ID: 1
Name: JOHN DOE
Birth Date: 01/01/2001
Gender: MALE
Guardian: MARY
Physician: BRADY, MARCIA MD

Phone:
Street:
City:
State:
ZIP:
Country:

Medicaid No:

WIC ID:

Vaccine Name	Dose 1	Dose 2	Dose 3	Dose 4
DTaP	03/01/2001	05/01/2001	07/01/2001	01/01/2002
IPV	05/05/2001			
Hib--unspecified	03/01/2001	05/01/2001	07/01/2001	
Hep B Ped/Adol - Preserv Free	01/01/2001			
Pneumococcal(PCV7)	03/01/2001	05/01/2001	07/01/2001	
MMR	01/01/2002			
Varicella	01/01/2002			
Polio - unspecified	03/01/2001	X 03/02/2001		

Next Vaccine Due: HEP-B 3 DOSE** **Date:** 02/01/2001

PATIENT RECORD – SUMMARY

This report reveals a summary of vaccine families. The illustration shown excludes confidential information.

Note: If the barcode font and application are not configured, a patient ID will display instead of a barcode label.

Figure 17-3: Patient Record - Summary

Patient Vaccination Record

Summary (Does not include all vaccine types)

Facility: CITY HOSPITAL
Date: August 6, 2003

Patient ID: 43
Name: MARY ANN SMITH
Birth Date: 09/19/2002
Gender:
Guardian:
Physician:

Phone:
Street:
City:
State:
ZIP:

Medicaid No:

WIC ID:

Vaccine Name	Dose 1	2	3	4	5	6	7	8
DTaP/DTP/DT/Td	09/19/2002	08/06/2003						
Hib	09/19/2002							
Hep B - 3 Dose	09/19/2002							

Next Vaccine Due: HEP-B 3 DOSE** **Date:** 09/19/2002

PATIENT RECORD – FORECAST

This report reveals a summary of vaccine families.

Note: If the barcode font and application are not configured, a patient ID will display instead of a barcode label

Figure 17-4: Patient Record - Forecast

Patient Vaccination Record

Forecast

Facility: CITY HOSPITAL
Date: August 6, 2003

Patient ID: 43
Name: MARY ANN SMITH
Birth Date: 09/19/2002
Gender:
Guardian:
Physician:

Phone:
Street:
City:
State:
ZIP:

Medicaid No:

WIC ID:

Vaccine Family	Dose	Scheduled Date	Minimum Valid Date
HEP-B 3 DOSE**	1	09/19/2002	09/19/2002
HIB	1	11/19/2002	10/31/2002
PNEUMO (PCV7)	1	11/19/2002	10/31/2002
POLIO	1	11/19/2002	10/31/2002
DTaP/DT/Td*	2	09/03/2003	09/03/2003
MMR	1	09/19/2003	09/19/2003
VARICELLA	1	09/19/2003	09/19/2003
HEP-B 2 DOSE**	1	09/19/2013	09/19/2013

* DTaP or DT should be given to patients under 7 years old. Td should be given to patients 7 years old or older.
** If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.

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18 REPORT MODULE

Depending on your user access, this option allows you to print various types of reports in the following **categories**:

- **Vaccinations**
- **Patients**
- **Vaccines For Children (VFC)**
- **Site Information**
- **Registry**
- **Quality**
- **Administrative**

Note: Depending on your user access, you may not see all of the above categories.

Some of these reports can be run immediately and some can be scheduled to run later (due to their size and time to run). The reports that can be scheduled will have a **SCHEDULE** button to the right of the report title. Additionally, some of the scheduled reports can be faxed. Faxing is a "state configurable" option.

To use the **REPORTS MODULE**, perform the following steps:

1. From the **REPORTS** menu, point and click the **REPORT MODULE** option. The "Reports" window menu listing appears.

Figure 18-1: Reports Menu List

Reports			
Vaccinations		**Patients**	
Vaccination Totals		Daily Patient Immunization List	
Vaccinations Breakdown		Patient Detail	
Manufacturers		Patient Totals	
Lot Number Summary		Patient Breakdown	
Lot Recall Listing		Recall for Inactivation	
Vaccine Deferrals		Race and Ethnicity Correlation	
		Updated Patients Labels	
		High Risk Patients	
Vaccines for Children		**Site Information**	
VFC Vaccinations Breakdown		Programs	
Vaccine Administered		Health Plans	
VFC Accountability Log		Facilities Detail	
		Physician/Vaccinator Detail	
Registry		**Quality**	
Updated Patients/Vaccinations	Schedule	Data Quality by IRMS and Facility	Schedule
Provider Submission Detail	Schedule	Patient Data Quality Detail	Schedule
Provider Submission	Schedule	Vaccination Data Quality	Schedule
Provider Response	Schedule	Vaccination Data Quality Detail	Schedule
Weekly Status	Schedule		
Registry Statistics	Schedule		
Daily Status	Schedule		
Patients Vaccinated			
Administrative			
Patient Queries		Usage Tracking	
Patient Changes		Bad Logins	Schedule
Antigen Summary			

2. Point and click on the title of the **REPORT** you want to run. Depending on the report chosen, a window of "limitations and selections" may appear for you to set up the specifics for the report; otherwise, the report will immediately display.

3. Refer to the **Category** of the report and then the **Report Title** for complete instructions. If the report is to be scheduled, refer to the major section titled, "Using the Scheduler" for instructions.

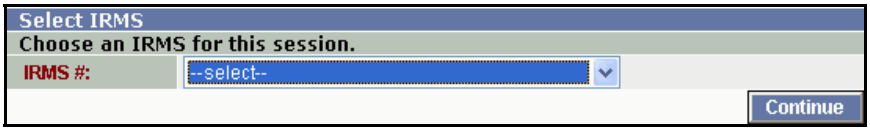
USING THE SCHEDULER TO OBTAIN REPORTS

Regardless of the report, the method of using the scheduler is the same. Perform the following steps to set up a schedule for any report title that contains a **SCHEDULE** button.

Note: Using a scheduler such as the Microsoft Scheduler can also setup automatic running/processing of files or reports.

1. Depending on your user access, the "Select IRMS" window may appear.

Figure 18-2: Select IRMS



2. Click on the drop-down arrow to view/select an **IRMS #** and then click the **CONTINUE** button.

3. Click on the **REPORTS** menu option. The "Reports" listing appears. Refer to Figure 18-1.

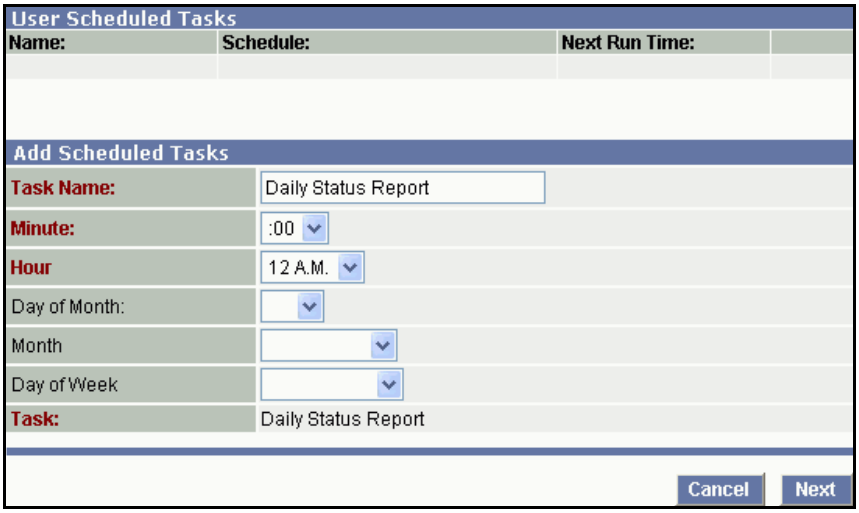
4. Continue to the next section.

ADDING A SCHEDULED TASK TO THE SCHEDULER

To add a Task to the Schedule, perform the following:

1. Click on the report's **SCHEDULE** button. The "Add a Scheduled Task" window appears.

Figure 18-3: User Scheduled Tasks



2. Refer to the table for a list of fields and descriptions.

Table 18-1: Add Scheduled Tasks Field Descriptions

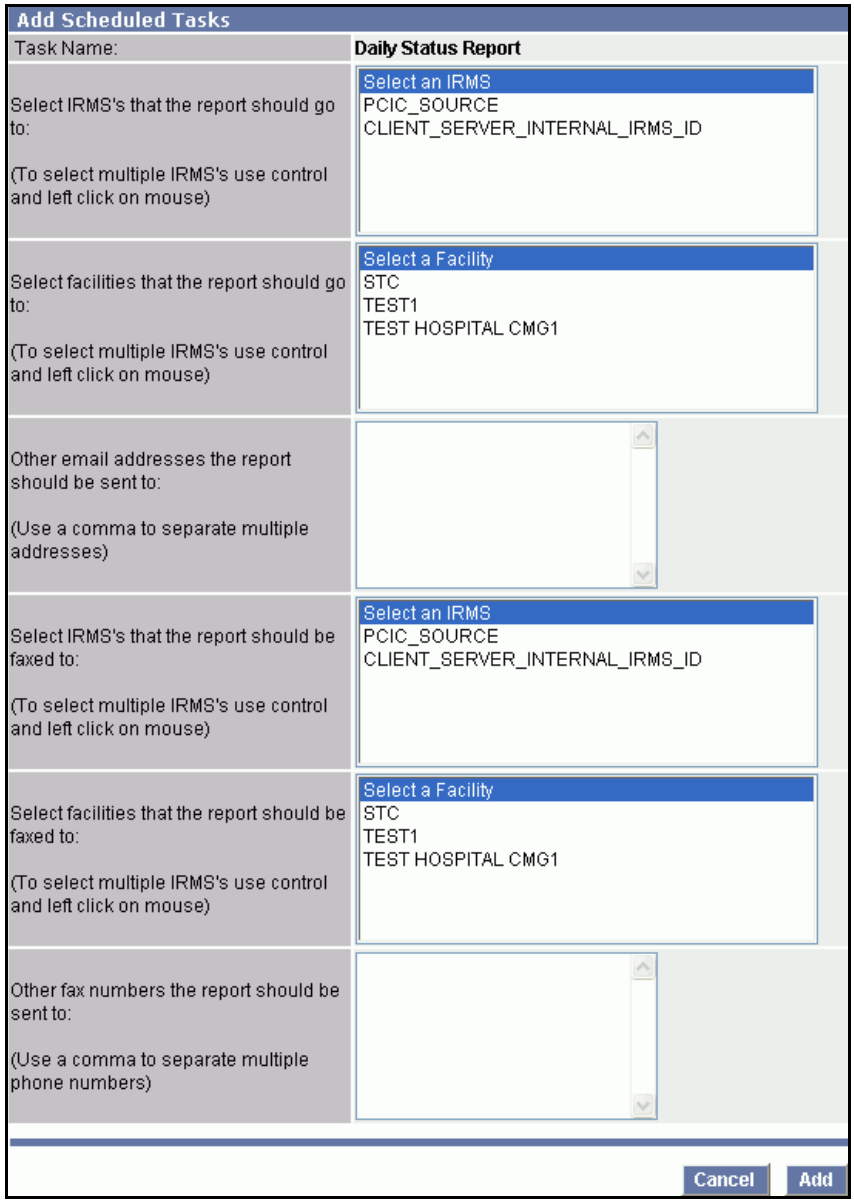
OPTION	DESCRIPTION
Select Schedule Parameters	
TASK NAME	Automatically fills in from the report's schedule button pressed on the reports menu.
MINUTE	The minutes that can be chosen are in five-minute intervals and will be used with the Hours field to indicate the "kick off" time for the report to run. Click on the drop-down arrow and point and click to make a selection. 00 is the default.
HOUR	The hours are an hour apart and will be used with the Minutes field to indicate the "kick off" time for the report to run. Click on the drop-down arrow and point and click to make a selection. 12 AM is the default.
DAY OF MONTH	Specific day of the month the report should run. If a blank appears, the report will run EVERY DAY. Click on the drop-down arrow and point and click to make a selection. Blank (or every day) is the default.
MONTH	Specific month the report should run. If a blank appears, the report will run EVERY MONTH. Click on the drop-down arrow and point and click to make a selection. BLANK (or every

OPTION	DESCRIPTION
	month) is the default.
DAY OF WEEK	Specific day of week the report should run. If a blank appears, the report will run EVERY DAY. Click on the drop-down arrow and point and click to make a selection. BLANK (or every day) is the default).
EMAIL ADDRESS(ES)	Permits you to type the email addresses of the person(s) who are to receive the report. If more than one person is going to get the report, separate each email address with a comma.

3. Click one of the available buttons:

- **CANCEL** – Does not save entries/selections and exits to the Reports menu.
- **NEXT** – Advances to the second window to select additional information (IRMS, Facility, email addresses, etc.) for the report.

Figure 18-4: Add Scheduled Tasks – Additional Information



4. Point and click on the names of the **IRMS**(s) the report should be **EMAILED** to. Multiple selections can be chosen if you hold down the **CTRL** key while selecting from the list.

5. Point and click on the names of the **FACILITIES** the report should be **EMAILED** to. Multiple selections can be chosen if you hold down the **CTRL** key while selecting from the list.

6. Type the **EMAIL ADDRESSES** where the report should be **EMAILED**. Separate the email addresses with a comma.

7. Point and click on the names of the **IRMS**(s) the report should be **FAXED** to. Multiple selections can be chosen if you hold down the **CTRL** key while selecting from the list.

   Note: Faxing is a "state configurable" option and only certain reports can be faxed.

8. Point and click on the names of the **FACILITIES** the report should be **FAXED** to. Multiple selections can be chosen if you hold down the **CTRL** key while selecting from the list.

9. Type the **FAX NUMBER(S)** where the report should be sent. Separate the FAX NUMBERS with a comma. Type the area code if different than yours and do not use dashes/hyphens between the numbers.

10. Click on the **ADD** button. The "User Scheduled Tasks List" appears with all scheduled tasks.

Figure 18-5: User Scheduled Tasks List

User Scheduled Tasks

Name:	Schedule:	Next Run Time:	
Daily Status Report	Every Wednesday at 12:00 AM	Wednesday, March 24, 2004 at 12:00 AM	Delete

11. You can **ADD** another **TASK** (repeat the above instructions), **EDIT** the existing tasks, or **DELETE** a task. Continue to the appropriate section below.

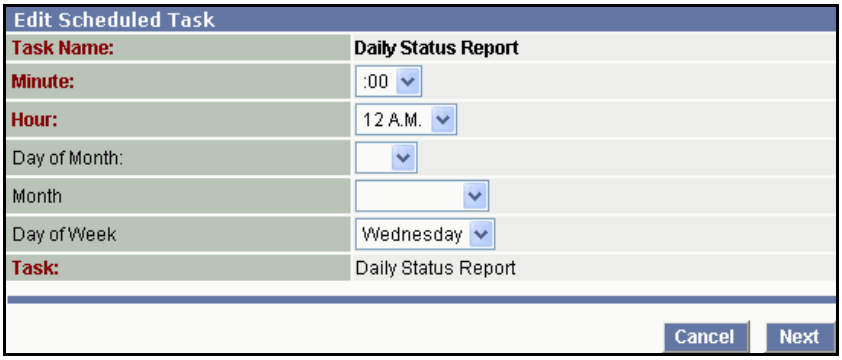
EDITING A SCHEDULE

To edit an existing Task, perform the following steps within the Reports Module, or you can edit a schedule from the UFM module:

1. Point and click on the **SCHEDULE** button to the right of the report's title. The "User Scheduled Tasks" window appears.

2. Point and click on the **REPORT NAME** (which is a hyperlink) whose schedule you want to edit. The "Edit Scheduled Tasks" window appears.

Figure 18-6: Edit Scheduled Tasks



3. Edit the desired field(s) and click the **NEXT** button if you need to edit email addresses and/or fax numbers (if applicable).

4. Verify the report names of the **IRMS**(s) been selected. Multiple selections can be made by holding down the **CTRL** key, while selecting from the list.

5. Verify the names of the **FACILITIES** the report should be emailed to have been selected. Multiple selections can be made by holding down the **CTRL** key, while selecting from the list.

6. Verify the **EMAIL ADDRESSES** are correct of where the report should be sent and change if necessary. Separate the email addresses with a comma.

7. If the report is one that can be faxed, make the necessary changes in the **FAX** fields.

8. Click on the **ADD** button. The "User Scheduled Tasks List" reappears with all scheduled tasks.

DELETING A SCHEDULE

To delete an existing task schedule, perform the following steps within the Reports Module, or you can edit a schedule from the UFM module:

1. Point and click on the **SCHEDULE** button to the right of the report's title. The "User Scheduled Tasks" window appears.

2. Point and click on the **DELETE** hyperlink to the right of the **REPORT NAME** you want to delete. The TASK will immediately get deleted and be removed from the list.

VACCINATION REPORTS

The Vaccination Reports Category includes the following reports:

- Vaccination Totals
- Vaccinations Breakdown
- Manufacturers
- Lot Number Summary
- Lot Recall Listing

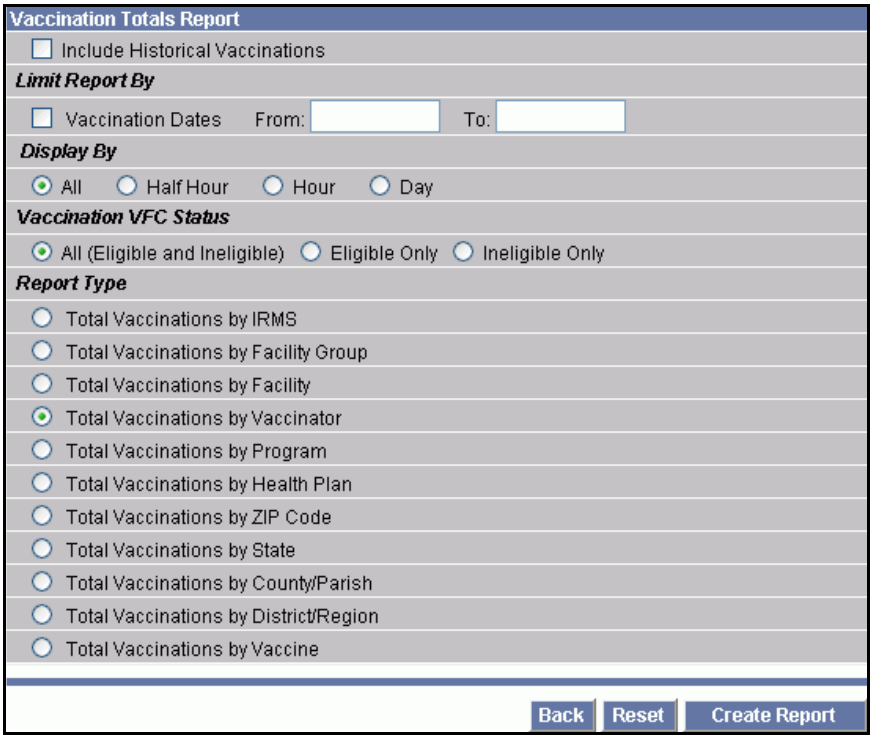
Each report's window of limitations and selections is shown under the individual report's title.

VACCINATION TOTALS

This report displays counts of vaccinations administered (or added as historical) by any of the following categories: Facility, Facility Group, Vaccinator, Program, Health Plan, Zip Code, State, County/Parish, or District/Region.

1. From the **VACCINATIONS CATEGORY**, point and click on the **VACCINATION TOTALS REPORT**. The report's limitation/selection window appears.

Figure 18-7: Vaccination Totals Report Limitations/Selections



2. Click in the "**Include Historical Vaccinations**" if you want to include them.

3. Type the **FROM** and **TO** dates if you want to limit the report by vaccination dates.

4. Click the radio button to select the **Vaccination VFC Status**. Statuses are:

   - **All** – Includes both Eligible and Ineligible
   - **Eligible Only**
   - **Ineligible Only**

5. Point and click the radio button to select the **REPORT TYPE** which will **group** the **Total Vaccinations** by:

   - Facility
   - Facility Group
   - Vaccinator
   - Program
   - Health Plan

- Zip Code
- State
- County/Parish
- District/Region

6. Point and click one of the available buttons:

- **RESET** – to erase newly entered/selected items and re-enter new criteria.
- **BACK** – to not submit the report and return to the previous "Reports Menu" list.
- **CREATE REPORT** – to display the report output in a new window (sample shown below).

Figure 18-8: Vaccination Totals Report

Vaccination Totals

Report Criteria **Report Date:** March 23, 2004

IRMS:	1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Report Type:	By Vaccinator
VFC Status:	All
Include Historical Vaccinations:	No
Vaccination Date Range:	All

Total Vaccinations Selected: 102

Vaccinator	Number of Vaccinations	Percent of Total Selected
NO VACCINATOR SPECIFIED	99	97.06
PVLNAME, PVFNAME	3	2.94

VACCINATIONS BREAKDOWN

This report displays all vaccinations by vaccine type for inactive/active patients, by date range, birth date range, per facility, state, county/parish, zip code, vaccinator, program, health plan, race, VFC Code, and District/Region. A grand total for the "Total" column appears at the bottom of the report.

1. From the **VACCINATIONS CATEGORY**, point and click on the **VACCINATIONS BREAKDOWN REPORT**. The report's limitation/selection window appears.

Figure 18-9: Vaccinations Breakdown Report Limitations/Selections

Vaccinations Breakdown Report

Include Inactive Patients | Include Historical Vaccinations

Limit Report By

Vaccination Date Range	From:	To:
Patient Birth Date Range	From:	To:
Facility	--select--	
Do Not Limit		
State	--select--	
County/Parish	--select--	
ZIP Code		
Vaccinator	--select--	
Program	--select--	
Health Plan	--select--	
Race	--select-- White	
VFC Code	--select--	
District/Region		

Back | Reset | Create Report

2. Point and click in the "**Include Inactive Patients**" or the "**Include Historical Vaccinations**" checkbox if you want to include them.

3. Type the **FROM** and **TO** dates if you want to limit the report by "**Vaccination Date Range**" or "**Patient Birth Date Range**." The checkboxes will automatically get selected after entering the dates.

4. Point and click the drop-down arrow to select to limit by the **Facility**. The radio button will automatically be selected, or point and click the radio button to **NOT LIMIT BY FACILITY**.

5. If desired, point and click on the drop-down arrow to select a **STATE**.

   Note: State must be selected before selecting a county/parish.

6. If desired, point and click on the drop-down arrow to select a **COUNTY/PARISH**.

7. If desired, type the **ZIP CODE**.

8. If desired, point and click on the following drop-down arrows to limit the report by:
   - Vaccinator
   - Program
   - Health Plan
   - Race
   - VFC Code
9. Type the **District/Region**. This is a whole number. As soon as data is entered, the checkbox will automatically get selected.
10. Point and click one of the available buttons:
    - **RESET** – to erase newly entered/selected items and re-enter new criteria.
    - **BACK** – to not submit the report and return to the "Reports Menu" list.
    - **CREATE REPORT** – to display the report output in a new window (sample shown below).

Figure 18-10: Vaccinations Breakdown Report

Vaccinations Breakdown

Report Criteria **Report Date:** March 23, 2004

IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Facility: All
Include Inactive Patients: No
Include Historical Vaccinations: No
Vaccinator: All
Health Plan: All
Race: All
Vaccination Date Range: All
Birth Date Range: All
VFC Code: All
Program: All
ZIP Code: All
State: All
County: All
District/Region: All

Selected Total: 102

Vaccine Name	Number of Vaccinations	Percent of Total Selected
DTaP	99	97.06
Smallpox	1	0.98
Smallpox Major Take	2	1.96

MANUFACTURERS

This report immediately displays a list of all active vaccine manufacturers and codes.

1. From the **VACCINATIONS CATEGORY**, point and click on the **MANUFACTURERS REPORT**. The report immediately appears in a separate browser window.

Figure 18-11: Vaccine Manufacturers Report

Vaccine Manufacturers

Report Date: March 23, 2004

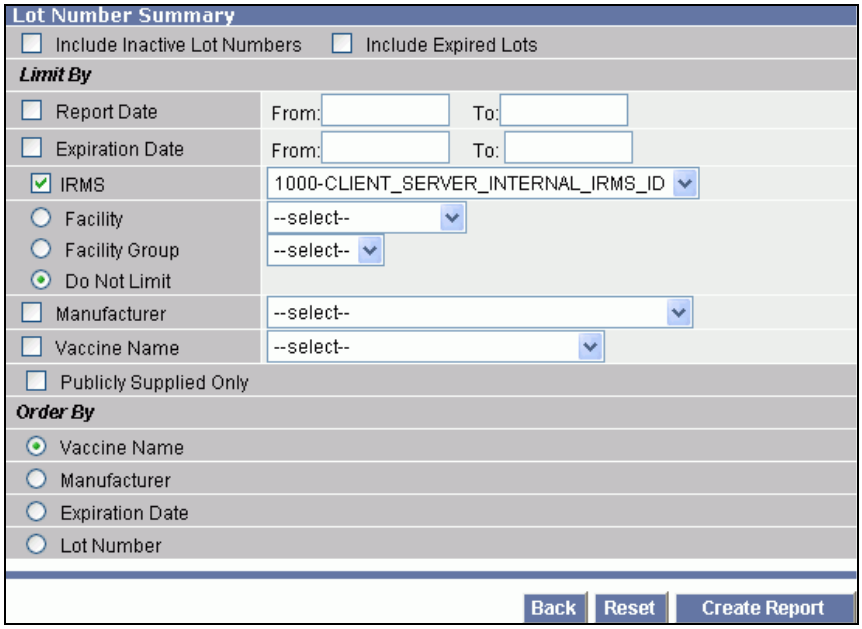
Manufacturer Code	Manufacturer
AB	ABBOT
AD	ADAMS
ALP	ALPHA
AVB	AVENTIS BEHRING L.L.C.
PMC	AVENTIS PASTEUR INC.
AVI	AVIRON
BAH	BAXTER HEALTHCARE CORPORATION
BAY	BAYER CORPORATION
BPC	BERNA PRODUCTS CORPORATION
MIP	BIOPORT CORPORATION
CHI	CHIRON CORPORATION
SKB	GLAXOSMITHKLINE
GRE	GREER
IUS	IMMUNO-US
KGC	KOREA GREEN CROSS
MBL	MASSACHUSETTS BIOLOGICAL LABS
MED	MEDIMMUNE, INC.
MSD	MERCK
JPN	MICROBIAL DIS/OSAKA U
NAB	NABI
NYB	NEW YORK BLOOD CENTER

LOT NUMBER SUMMARY

This report displays a summary of Vaccine Name, Lot Number, Manufacturer, Expiration Date, VFC Eligibility, Number of Doses Available, Doses Used, Doses Wasted, and Total Doses.

1. From the **VACCINATIONS CATEGORY**, point and click on the **LOT NUMBER SUMMARY REPORT**. The report's limitation/selection window appears.

Figure 18-12: Lot Number Summary Limitations/Selections



2. The fields and their descriptions are listed in the table:

Table 18-2: Lot Number Summary Field Descriptions

FIELD	DESCRIPTION
INCLUDE INACTIVE LOT NUMBERS	Point and click in the "Include Inactive Lot Numbers" if you want to include them.
INCLUDE EXPIRED LOTS	Point and click in the "Include Expired Lots" if you want to include them.
REPORT DATE	To limit the report by a specific date range, type both the From and To dates into their respective fields. **Note**: If the report is run by Report Date, the report will display a "Starting number of Doses" column. The Starting number of Doses will be the # of doses available at the beginning of the date range.
EXPIRATION DATE	To limit the report by a specific expiration date range, type both the From and To dates into their respective fields.
IRMS	To limit the report by a specific IRMS, click the drop-down menu arrow to view/select a valid choice.
FACILITY, FACILITY GROUP, DO NOT LIMIT	To limit the report by a specific Facility or Facility Group, click the drop-down menu arrow to view/select a valid choice from the respective fields.
MANUFACTURER	To limit the report by a specific manufacturer, click the drop-down menu arrow to view/select a valid choice.
VACCINE NAME	To limit the report by a specific vaccine, click the drop-down menu arrow to view/select a valid choice.
PUBLICLY SUPPLIED ONLY	To limit the report by Publicly Supplied Vaccines, click the checkbox to select/deselect it

3. Point and click in the **ORDER BY** category so that the data will appear in the desired order. Categories are:

- Vaccine Name

- Manufacturer
- Expiration Date
- Lot Number

4. Point and click one of the available buttons:

- **BACK** – to return to the Reports menu list.
- **RESET** – to erase any newly entered/selected items and remain on the window to reenter new criteria.
- **CREATE REPORT** – to send the query and display the report output in a new window.

Figure 18-13: Lot Number Summary Report

Lot Number Summary

Report Criteria: **Report Date:** August 31, 2005

IRMS:	1000 - CLIENT_SERVER_INTERNAL_IRMS_ID		
Facility:	All		
Vaccine Name:	All	Include Inactive Lots:	No
Manufacturer:	All	Include Expired Lots:	No
Expiration Date Range:	All	Publicly Supplied Only:	No
Report Date Range:	01/01/2005 to 08/01/2005	Sort Order:	Vaccine Name

Note: This report was run for a limited date range. All inventory counts displayed (Doses Available, Doses Total, etc.) reflect the inventory during that period of time only.

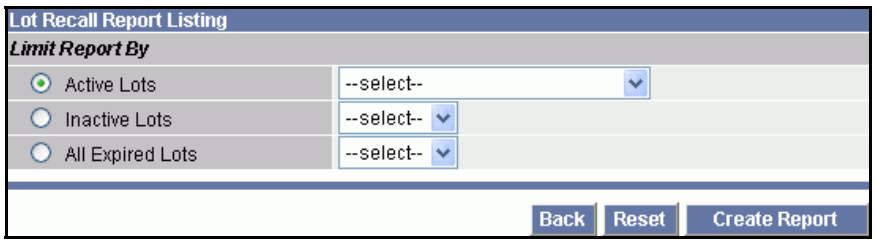
Lot Number	Vaccine Name	Manufacturer	Expires	Publicly Supplied	Doses Available	Starting Doses	Doses Adjusted	Doses Used	Doses Wasted	Inactive
9514532	DTaP	ABBOT	01/01/2008	Y	95	96	0	1	0	

LOT RECALL LISTING

This report will list out all of the patients who received a shot from a specific lot.

1. From the **VACCINATIONS CATEGORY**, point and click on the **LOT RECALL LISTING REPORT**. The report's limitation/selection window appears.

Figure 18-14: Lot Recall Report Listing Limitations/Selections



2. Point and click one of the radio buttons to limit the report by:

- Active Lots
- Inactive Lots
- Expired Lots

3. Point and click one of the available buttons:

- **RESET** – to erase newly entered/selected items and re-enter new criteria.
- **BACK** – to not submit the report and return to the "Reports Menu" list.
- **CREATE REPORT** – to display the report output in a new window (sample shown below).

Figure 18-15: Lot Recall Report

Lot Recall Report

Report Criteria **Report Date:** March 23, 2004

IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID **Publicly Supplied:** N
Vaccine: Smallpox **Manufacturer:** GREER **Lot Number:** SMALL-1 **Lot Facility:** TEST HOSPITAL CMG1

Vaccination Date	Vaccinating Facility	SIIS Patient ID	First Name	Last Name	Birthday
01/01/2004	TEST HOSPITAL CMG1	54	ROGER	TESTFR1	01/01/1980

Total Patients Selected: 1 **Total Vaccinations Administered:** 1

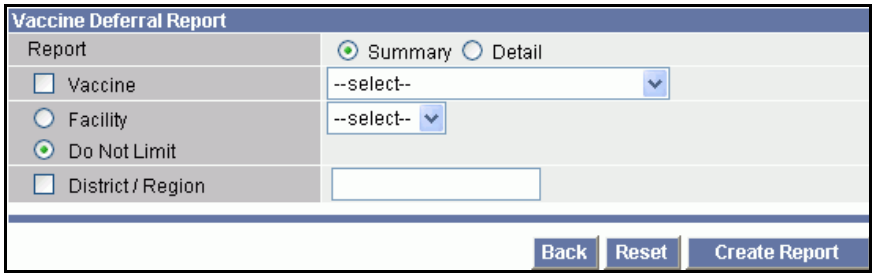
VACCINE DEFERRAL

This report will list the patient ID, patient name, date of birth, vaccine, and dose that was deferred in tabular format. It can be limited by IRMS, Facility, or Facility Group depending on the user's access level and can be summarized or detailed.

Note: This report will print what was entered on the Deferral window versus what is on the Vaccination Schedule.

1. From the **VACCINATIONS** category, click the report's title. The report's "Limitations/Selections" window appears.

Figure 18-16: Vaccine Deferral Limitations/Selections



2. In the **REPORT** section, click on the radio button to select **SUMMARY** or **DETAIL**.
3. In the **VACCINE** field, click the drop-down menu arrow and select the vaccine. The Vaccine checkbox will automatically get selected/checked.
4. In the **IRMS** field, click the drop-down menu arrow and select the IRMS you want the report to limit by.
5. In the **FACILITY/GROUP/DO NOT LIMIT** report section, click on the drop-down menu arrow and select the Facility or Facility group; otherwise leave the Do Not Limit radio button selected.
6. In the **DISTRICT/REGION** field, type the name/number. The checkbox will automatically get selected.
7. Click one of the available buttons:
   - **RESET** – to clear the input fields and remain on the window to re-enter criteria.
   - **BACK** – to not submit the report and return to the "Reports Menu" list.
   - **CREATE REPORT** – to display the report in a new browser window providing the option to print. Shown below are illustrations of the Summary and Detail reports, respectively without limitations.

Figure 18-17: Vaccine Deferrals Summary Report

Vaccine Deferrals Summary Report

Count of Deferred Vaccinations Given

Report Criteria: **Report Date:** July 22, 2004

	IRMS 1000	Uknown IRMS	IRMS 1001	Total
MMR	1			1
Hib--unspecified	1			1
DTaP	1	1	1	3
Varicella	1			1
HBIG	1			1
PPD Test	1			1
Botulinum Antitoxin	1			1
Diphtheria antitoxin	1			1
Hep A/Hep B - Adult	1			1
Hep A 2 dose - Adult	1			1
Total	**10**	**1**	**1**	**12**

Figure 18-18: Vaccine Deferrals Detail Report

Vaccine Deferrals Report

Listing of Patients Given Deferred Vaccinations

Report Criteria: **Report Date:** July 22, 2004

12 matches found

SIIS Id	First Name	Last Name	Vaccine	Dose	Date	IRMS
68684	CPYLA	019809209	DTaP	5	07/16/2004	1001
122713	AL	CAPONE	DTaP	423	07/13/2004	
122724	JANE	DOE	DTaP	2	07/16/2004	1000
122710	JOHN	DOE	Botulinum Antitoxin	2	07/16/2004	1000
122710	JOHN	DOE	Diphtheria antitoxin	1	07/16/2004	1000
122710	JOHN	DOE	HBIG	1	07/16/2004	1000
122710	JOHN	DOE	Hep A 2 dose - Adult	1	07/16/2004	1000
122710	JOHN	DOE	Hep A/Hep B - Adult	1	07/16/2004	1000
122710	JOHN	DOE	Hib--unspecified	1	07/16/2004	1000
122710	JOHN	DOE	MMR	1	07/16/2004	1000
122710	JOHN	DOE	PPD Test	1	07/16/2004	1000
122710	JOHN	DOE	Varicella	1	07/16/2004	1000

PATIENTS REPORTS

Each report's window of limitations and selections is shown under the individual report's title.

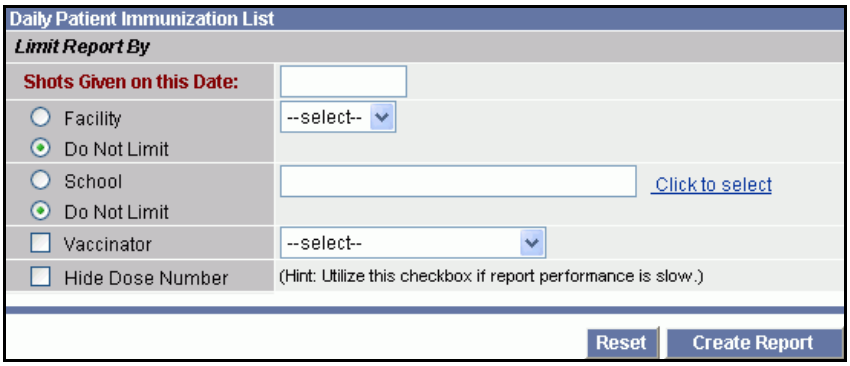
DAILY PATIENT IMMUNIZATION LIST

This report lists all of the immunizations given on a specific date and can be listed by facility and/or vaccinator. In addition, this

report can run by school in order to provide information back to schools on those that received immunizations.

1. From the **PATIENTS CATEGORY**, point and click on the **DAILY PATIENT IMMUNIZATION LIST**. The report's limitation/selection window appears.

Figure 18-19: Daily Patient Immunization List Limitations/Selections



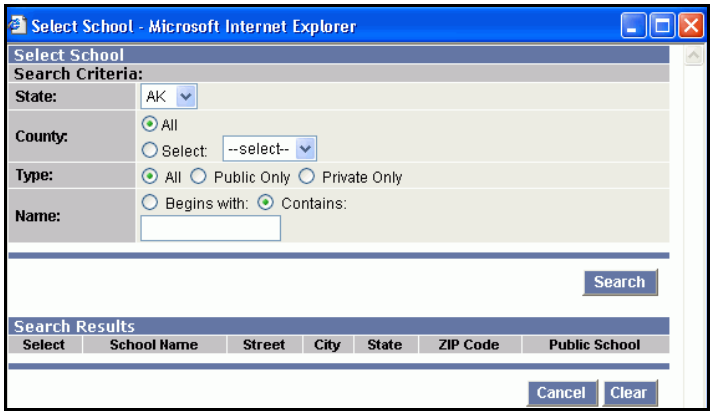
2. You must enter a date in the "**Shots Given on this Date**" field. Dates are entered in the mmddyyyy format.

3. You can optionally select to limit the report by any of the following:

   - **Facility or NOT LIMIT BY FACILITY**. To limit by Facility, click the drop-down arrow and choose a facility. The radio button will automatically be selected.

   - **School** or **NOT LIMIT BY SCHOOL**. To limit by School, click on the "click to select" hyperlink. The "Select School" window appears.

Figure 18-20: Select School



- Select the appropriate **STATE** by clicking on the drop-down
- Select the **COUNTY** – The **ALL** radio button is chosen by default; however, click the drop-down arrow to select the specific county. The SELECT radio button will then automatically get selected.
- Select **TYPE** (of school)–**ALL** (for both public and private); or **PUBLIC ONLY**; or **PRIVATE ONLY** (for a list of private schools).
- Select **NAME** – You can select **BEGINS WITH** or **CONTAINS** and type the name (or partial name) of the school.
- Press the **SEARCH** button. The "Search Results" appear.
- Click on the **SELECT ARROW** to choose a school—the school will automatically copy into the School field; or click **CLEAR** to erase and type a different name; or click on **CANCEL** to exit and not make a selection.
- The "Daily Patient Immunization List" window reappears with your school selection.

4. If desired, point and click the drop-down arrow to select a **VACCINATOR**.

5. Point and click one of the available buttons:

- **RESET** – to erase newly entered/selected items and re-enter new criteria.
- **BACK** – to not submit the report and return to the “Reports Menu” list.
- **CREATE REPORT** – to display the report output in a new window (sample shown below).

Figure 18-21: Daily Patient Immunization List

Daily Patient Immunization List

Report Criteria **Report Date:** August 6, 2003

IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Facility: All
Shots Given on this Date: 08/06/2003
Vaccinator: All

Patient Name	Birth Date	Vaccine	Dose	Facility	Vaccinator
SMITH, MARY ANN	09/19/2002	DTaP	2	AP&S-REED,SCULLY,GARB#00000164	ROBSON, BOB

Total Number of Vaccines: 1

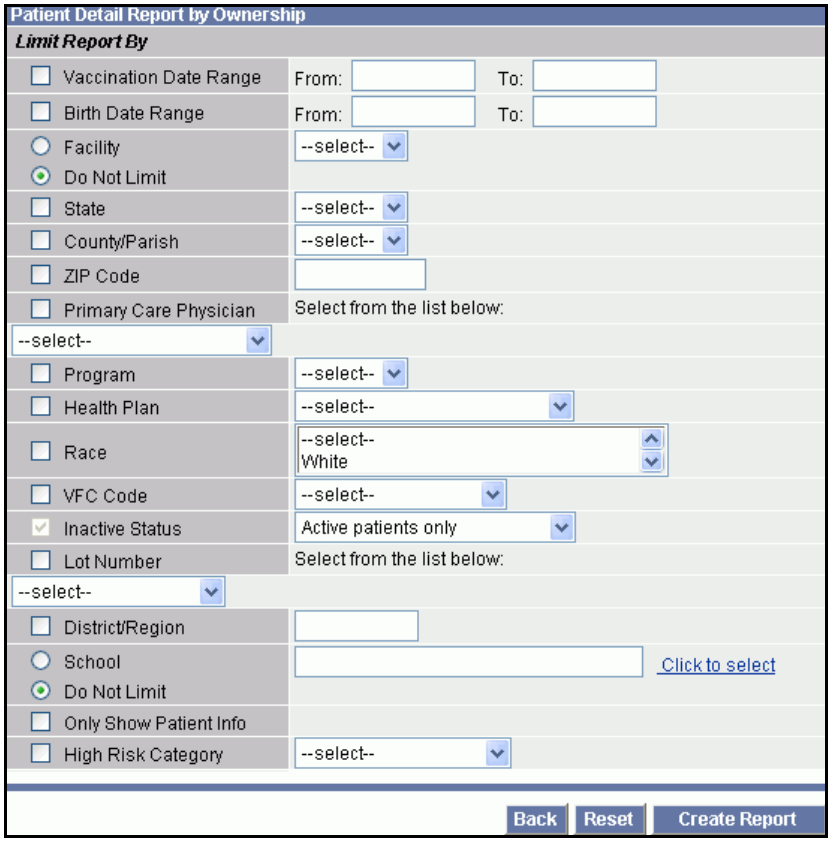
Total Number of Patients: 1

PATIENT DETAIL REPORT (BY OWNERSHIP)

This report displays detailed information about patients that are owned by the user's IRMS/Facility and the vaccinations their patients received.

1. From the **PATIENTS CATEGORY**, point and click on the **PATIENT DETAIL REPORT**. The report's limitation/selection window appears.

Figure 18-22: Patient Detail Report Limitations/Selections



2. Type the **FROM** and **TO** dates if you want to limit the report by **VACCINATION DATE** or **BIRTH DATE** range. The checkbox will automatically select.

3. Point and click the drop-down arrow to select to limit by the **Facility**. The radio button will automatically be selected, or point and click the radio button to **NOT LIMIT BY FACILITY**.

4. If desired, point and click on the drop-down arrow to select a **STATE**.

   Note: State must be selected before County/Parish can be selected.

5. If desired, point and click on the drop-down arrow to select a **COUNTY/PARISH**.

6. If desired, type the **ZIP CODE**.

7. If desired, point and click on the following drop-down arrows to limit the report by:
   - Primary Care Physician
   - Program
   - Health Plan
   - Race
   - VFC Code
   - Inactive Status
   - Lot Number
8. Type the District/Region. This is a whole number. As soon as data is entered, the checkbox will automatically get selected.
9. You can optionally select to limit the report by **School** or **NOT LIMIT BY SCHOOL**. To limit by School, click on the "click to select" hyperlink. The "Select School" window appears. Refer to Figure 18-20.
   - Select the appropriate **STATE** by clicking on the drop-down
   - Select the **COUNTY** – The **ALL** radio button is chosen by default; however, click the drop-down arrow to select the specific county. The SELECT radio button will then automatically get selected.
   - Select **TYPE** (of school)–**ALL** (for both public and private); or **PUBLIC ONLY**; or **PRIVATE ONLY** (for a list of private schools).
   - Select **NAME** – You can select **BEGINS WITH** or **CONTAINS** and type the name (or partial name) of the school.
   - Press the **SEARCH** button. The "Search Results" appear.
   - Click on the **SELECT ARROW** to choose a school—the school will automatically copy into the School field; or click **CLEAR** to erase and type a different name; or click on **CANCEL** to exit and not make a selection.

- The "Patient Detail" window reappears with your school selection.

10. To limit the report to **ONLY SHOW PATIENT INFO**, only the following fields will appear on the report.

- First Name
- Middle Name
- Last Name
- Birthday
- Guardian FN
- Phone Number
- School
- Vaccination headers will appear without data

11. To limit the report by **HIGH RISK CATEGORY**, click the drop-down menu arrow to view/select a category.

Note: The High Risk Categories must be defined by the SIIS Administrator before it will show up as an option on this window.

12. Point and click one of the available buttons:

- **RESET** – to erase newly entered/selected items and re-enter new criteria.
- **BACK** – to not submit the report and return to the "Reports Menu" list.
- **CREATE REPORT** – to display the report output in a new window (sample shown below).

Figure 18-23: Patient Detail by Ownership Report

Patient Detail Report by Ownership

Report Criteria **Report Date:** March 23, 2004

IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Facility: All
Patients Status: Active and inactive patients
Birth Date Range: All
Physician: All
Health Plan: All
Race: All
Lot Number: All
District/Region: All
Vaccination Date Range: All
VFC Code: All
Program: All
ZIP Code: All
State: All
County/Parish: All
School: All

Total Patients Selected: 35 **Deleted vaccinations are shown with a line through them.**

First Name	Middle Name	Last Name	Birthday	Guardian F.N.	Phone Number	School
MISTY		ALDAMA	01/21/2001	MARY	(654)357-1584	

Vaccine Name	Vaccination Date	Manufacturer Code	Lot Number	Historical
DTaP	03/21/2001			N
DTaP	05/21/2001			N
DTaP	07/21/2001			N
DTaP	01/21/2002			Y

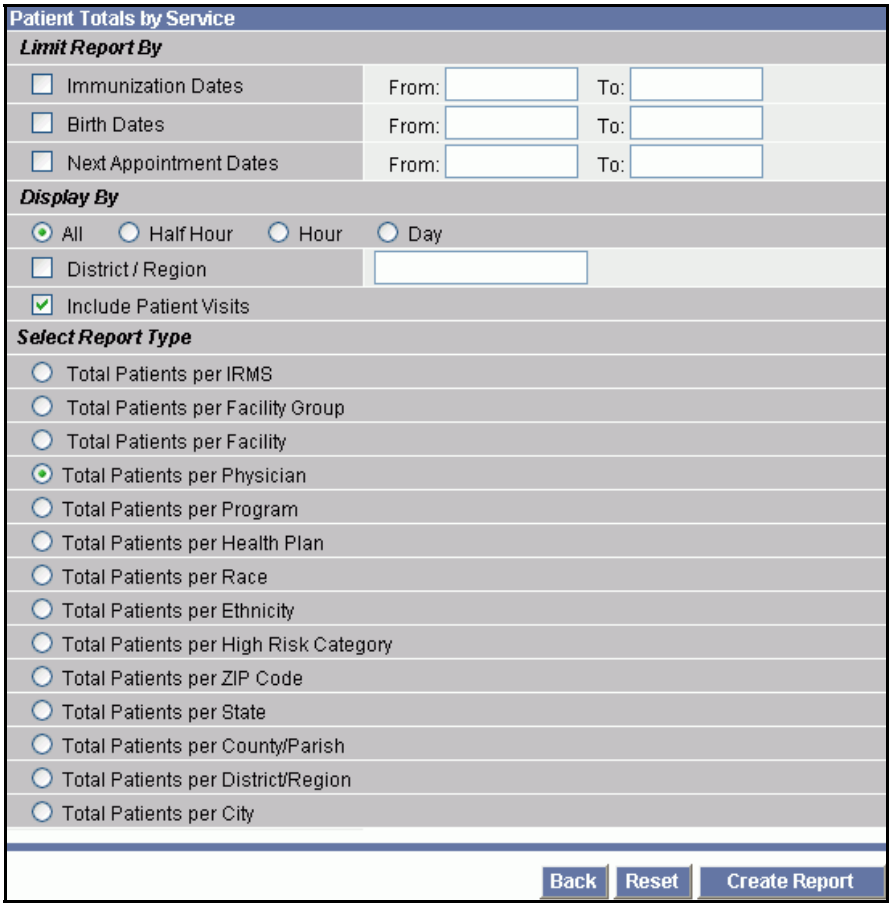
PATIENT TOTALS (BY SERVICE)

This report will display totals of the number of patients seen regardless of current ownership. It also includes a Total Visits column (using vaccination dates from the database) to record the number patients that received services more than once over a period of time. In addition, there are various options to limit the report including Program, Race, and City as well as Birth Date, Appointment, and Immunization date ranges. A grand total for the "Total" column appears at the bottom of the report.

Note: The **Total Visits** column will not appear when the report is run by day, hour, or half hour since vaccinations are recorded by date versus time. It is also important to mention that “Total Visits” will be incremented for each race when a multi-racial patient is included in the report. For example, if a patient was included as having two races, then even though that patient was only seen once, the total for each of their races would be incremented.

1. From the **PATIENTS CATEGORY**, point and click on the **PATIENT TOTALS REPORT**. The report's limitation/selection window appears.

Figure 18-24: Patient Totals Report Limitations/Selections



2. In the **LIMIT REPORT BY** section, type the **FROM** and **TO** dates for **IMMUNIZATION DATES, BIRTH DATES**, or **NEXT APPOINTMENT DATES**. As soon as you type both the FROM and TO dates, the checkbox will automatically get selected/checked.

3. In the **DISPLAY BY** section, click one of the radio buttons—**ALL, HALF HOUR, HOUR**, or **DAY**. Select to display by IRMS by clicking the drop-down menu arrow (the radio button automatically will be selected) or leave the DO NOT LIMIT radio button selected for all.

4. In the **SELECT REPORT TYPE** section, click the radio button to select the **REPORT TYPE** which will group the Total Patients by:

   - IRMS
   - Facility Group

- Facility
- Physician
- Program
- Health Plan
- Race
- Ethnicity
- High Risk Category
- Zip Code
- State
- County/Parish
- District/Region
- City

5. Point and click one of the available buttons:

- **RESET** – to erase newly entered/selected items and re-enter new criteria.
- **BACK** – to not submit the report criteria and return to the previous window.
- **CREATE REPORT –** to display the report output in a new window (sample shown below).

Figure 18-25: Patient Totals by Service

Patient Totals by Service

Report Criteria **Report Date:** September 29, 2005

IRMS:	1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
District/Region:	All
Report Type:	By Physician
Display By:	All
Immunization Date Range:	All
Birth Date Range:	All
Appointment Date Range:	All
Display Total Visits:	Yes

Total Patients Selected: 6

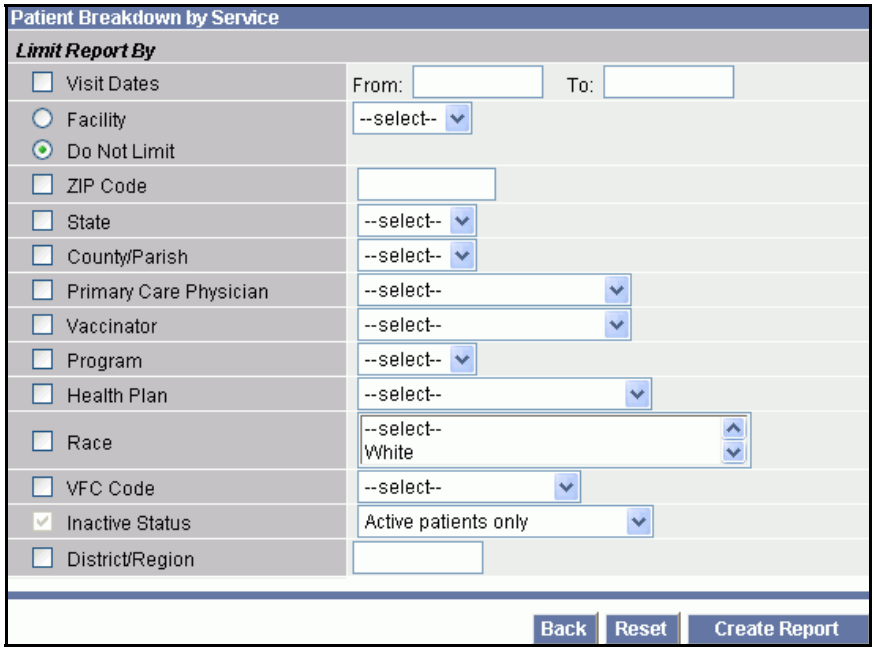
Physician	Total Patients	Total Visits	Percent of Total Patients Selected
NO PHYSICIAN SPECIFIED	4	6	66.7
MARCIA BRADY	2	10	33.3
Total	**6**	**16**	**100.0**

PATIENT BREAKDOWN (BY SERVICE)

This report displays totals of the patients in each age grouping that were seen regardless of current patient ownership. A grand total for the "Total" column appears at the bottom of the report.

1. From the **PATIENTS CATEGORY**, point and click on the **PATIENT BREAKDOWN REPORT**. The report's limitation/selection window appears.

Figure 18-26: Patient Breakdown by Service Limitations/Selections



2. Point and click the "**Include Inactive Patients**" if you want to include them.

3. Type the **FROM** and **TO** dates for the **VISIT DATES**. The checkbox will automatically get selected.

4. Point and click the drop-down arrow to select to limit by the **Facility**. The radio button will automatically be selected, or point and click the radio button to **NOT LIMIT BY FACILITY**.

5. If desired, type the **ZIP CODE**.

6. If desired, point and click on the following drop-down arrows to limit the report by:

   - State

- County/Parish
- Primary Care Physician
- Vaccinator
- Program
- Health Plan
- Race
- VFC Code
- Inactive Status

7. Type the **District/Region**. This is a whole number. As soon as data is entered, the checkbox will automatically get selected.

8. Point and click one of the available buttons:

- **RESET** – to erase newly entered/selected items and re-enter new criteria.
- **BACK** – to not submit the report and return to the "Reports Menu" list.
- **CREATE REPORT** – to display the report output in a new window (sample shown below).

Figure 18-27: Patient Breakdown by Service Report

Patient Breakdown by Service

Report Criteria **Report Date:** March 23, 2004

IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Facility: All
Inactive Status: Active patients only
Primary Care Physician: All
Vaccinator: All
Vaccination Date Range: All
Race: All
Program: All
Health Plan: All
VFC Code: All
State: All
ZIP Code: All
County/Parish: All
District/Region: All

Total Selected Patients: 35

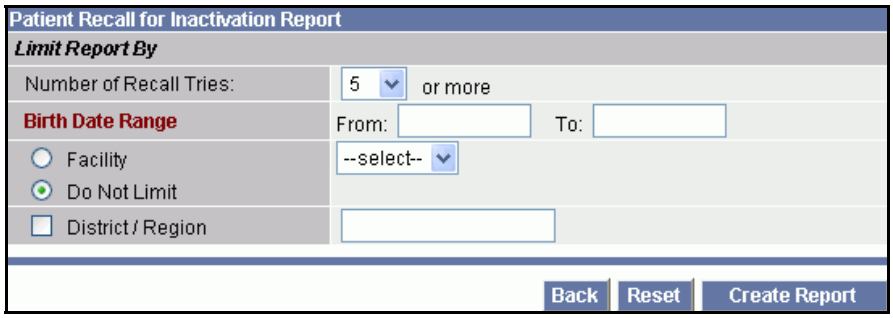
Age	Number of Patients	Percent of Total Selected
Months		
< 3	0	0.0
3 - 5	0	0.0
6 - 7	0	0.0
8 - 11	0	0.0
12 - 23	0	0.0
Years		
2 - 3	33	94.29
4 - 6	0	0.0
7 - 11	0	0.0

RECALL FOR INACTIVATION

This report lists patients who have been recalled a specified number of times that have not been seen since they were recalled; hence this report can be used to inactivate them in the application.

1. From the **PATIENTS CATEGORY**, point and click on the **RECALL FOR INACTIVATION REPORT**. The report's limitation/selection window appears.

Figure 18-28: Patient Recall for Inactivation Limitations/Selections



2. Point and click the drop-down arrow to select the "**NUMBER OF RECALL TRIES**" (or more).
3. You must type the **FROM** and **TO** dates for the **BIRTH DATE RANGE**. The checkbox will automatically get selected.
4. Point and click the drop-down arrow to select to limit by the **Facility**. The radio button will automatically be selected, or point and click the radio button to **NOT LIMIT BY FACILITY**.
5. Type the **District/Region** to limit by District/Region. The checkbox will automatically get selected upon typing.
6. Point and click one of the available buttons:
   - **RESET** – to erase newly entered/selected items and re-enter new criteria.
   - **BACK** – to not submit the report and return to the "Reports Menu" list.
   - **CREATE REPORT** to display the report output in a new window (sample shown below).

Figure 18-29: Patient Reminder Recall for Inactivation Report

Patient Reminder Recall for Inactivation Report

Report Criteria — Report Date: May 9, 2003

IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Facility: All
Number of Recall Tries Greater than or Equal To: 5
Birth Date Range: 11/18/1974 to 05/04/2003

Total Patients Selected: 3

Patient ID	First Name	Middle Name	Last Name	Birthday	# of Recall Tries
8649	HENRIETTA		FARMERTON	03/12/2002	6
42	BOB		SMITH	01/01/2001	6
47	GEORGE	WILLIAM	WASHINGTON	04/04/2002	6

RACE AND ETHNICITY CORRELATION

This report is used to correlate race and ethnicity of patients that received service. The report can be limited based on IRMS, Facility, Facility Group, immunization date, or birth date. As with other reports of this type, it can be displayed by district. Race codes are listed on the left, and ethnicities are listed at the top.

1. From the **PATIENTS CATEGORY**, point and click on the name of the report. The report's limitation/selection window appears.

Figure 18-30: Patient Race and Ethnicity Correlation Limitations/Selections

Patient Race and Ethnicty Correlation Reports

Limit Report By

- [ ] Immunization Dates — From: ____ To: ____
- [ ] Birth Dates — From: ____ To: ____
- [x] IRMS — CLIENT_SERVER_INTERNAL_IRMS_ID (1000)
- ( ) Facility — --select--
- (•) Do Not Limit
- [ ] District / Region

Back | Reset | Create Report

2. Optionally, type/select the following:
   - Immunization Dates – type the FROM and TO dates.
   - Birth Dates – type the FROM and TO dates.
   - IRMS – click the drop-down menu arrow to view/select a valid choice.

- Facility – click the drop-down menu arrow to view/ select a valid facility.
- District/Region – type the district and/or region.

3. Click one of the available buttons:
   - **RESET** – to erase the input fields and remain on the window to re-enter criteria.
   - **BACK** – to not submit the report and return to the "Reports Menu" list.
   - **CREATE REPORT** – to display the report (shown below).

Figure 18-31: Patient Race and Ethnicity Correlation Report

Patient Race and Ethnicity Correlation Report

Report Criteria **Report Date:** October 4, 2005

IRMS:	1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
District/Region:	All
Facility:	All
Immunization Date Range:	All
Birth Date Range:	All

	Hispanic or Latino	Not Hispanic or Latino	No Ethnicity Specified	Total
White	0	1	0	1
Black or African American	0	0	0	0
Asian	0	0	0	0
American Indian or Alaska Native	0	0	0	0
Native Hawaiian or Other Pacific Islander	0	0	0	0
Multi-racial	0	0	0	0
No Race Specified	0	0	1	1
Total	0	1	1	2

UPDATED PATIENTS LABELS

This report will print patient labels including their name and date of birth.

1. From the **VACCINATIONS CATEGORY**, point and click on the **UPDATED PATIENT LABELS REPORT**. The report's limitation window appears.

Figure 18-32: Recently Updated Patient Labels Limitations/Selections

Recently Updated Patient Labels

Limit Report by

Patient Data/Vaccinations Update Date Range: From To

Date Format: mm/dd/yyyy

Facility --select--

Do Not Limit

Back Reset Create Report

2. You **MUST** enter a **FROM** and **TO** date in the red fields, for the **PATIENT DATA/VACCINATIONS UPDATE**

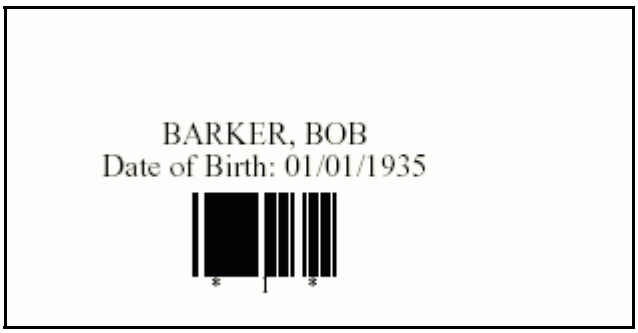
DATE RANGE. Type the dates using the format, mmddyyyy.

3. Optionally, click the drop-down arrow to limit the report by IRMS or **FACILITY**, or leave the **DO NOT LIMIT** radio button selected.

4. Point and click on one of the available buttons:

   - **RESET** – to erase the input fields and remain on the window to re-enter criteria.
   - **BACK** – to not submit the report and return to the "Reports Menu" list.
   - **CREATE REPORT** – to display the report (shown below).

Figure 18-33: Patient Label Report

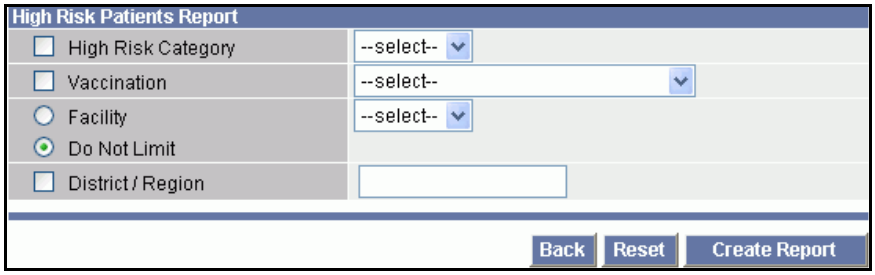


HIGH RISK PATIENTS

This report details the high risk patients. The user can select the IRMS, Facility, High Risk Categories, and Vaccines. The report will print the report's criteria, run date, and total number of unique patients meeting the criteria. Also includes will be the Last Name, First Name, Middle Initial, DOB, SIIS ID, most recent vaccination, and categories the patient belongs to. Each category is on its own row.

1. From the **PATIENTS** category, point and click on the **HIGH RISK PATIENTS** report. The report's limitation/selection window appears.

Figure 18-34: High Risk Patients Report Limitations/Selections



2. In the **HIGH RISK CATEGORY** section, click the drop-down menu arrow to view/select a category. After a selection is made, the checkbox will automatically get selected (checked).

3. In the **VACCINATION** section, click the drop-down arrow to view/select a vaccine. After a selection is made, the checkbox will automatically get selected (checked).

4. In the **IRMS** section, click the drop-down menu arrow to view/select an IRMS.

5. In the **FACILITY/FACILITY GROUP** section, click the drop-down menu arrow to view/select a facility or group, or leave the **DO NOT LIMIT** radio button selected. After a selection is made, the radio button will automatically get selected.

6. Point and click one of the available buttons:

   - **CLEAR** – to erase the newly entered/selected items and re-enter new criteria.
   - **BACK** – to not save and exit to the reports menu window.
   - **CREATE REPORT** – to display the report (shown below).

Figure 18-35: High Risk Patients Report

High Risk Patients Report

Report Criteria: **Report Date:** November 22, 2004

IRMS: All
Facility: All
High Risk Category: All
Vaccine: DTaP

Patient Total: 1

First Name	Last Name	Middle Name	DOB	SIIS Id	Most Recent Vaccination	High Risk Category
JOHN	DOE		01/01/2000	122900	01/01/2002	ASTHMA

VACCINES FOR CHILDREN (VFC) REPORTS

Each report's window of limitations and selections is shown under the report's title.

VFC VACCINATIONS BREAKDOWN

This report lists the total vaccinations given for every VFC type and the percentage of the total.

1. From the **VACCINATIONS FOR CHILDREN CATEGORY**, point and click on the **VFC VACCINATIONS BREAKDOWN REPORT**. The report's limitation/selection window appears.

Figure 18-36: Vaccinations Breakdown Report Limitations/Selections

VFC Vaccinations Breakdown Report

Limit Report By

- [ ] Vaccination Date Range — From: To:
- [ ] Patient Birth Date Range — From: To:
- ( ) Facility — --select--
- (•) Do Not Limit
- [ ] State — --select--
- [ ] County/Parish — --select--
- [ ] Vaccinator — --select--
- [ ] Health Plan — --select--
- [ ] Race — --select-- White
- [ ] District/Region

Back | Reset | Create Report

2. Type the **FROM** and **TO** dates if you want to limit the report by "**Vaccination Date Range**" or "**Patient Birth Date Range.**" The checkboxes will automatically get selected after entering the dates.

3. Point and click the drop-down arrow to select to limit by the **Facility**. The radio button will automatically get selected, or point and click the radio button to **NOT LIMIT BY FACILITY**.

4. If desired, point and click on the following drop-down arrows to limit the report by:
   - State
   - County/Parish
   - Vaccinator
   - Health Plan
   - Race

5. If desired, type the **District/Region**. This is a whole number. As soon as data is entered, the checkbox will automatically get selected.

6. Point and click one of the available buttons:
   - **RESET** – to erase newly entered/selected items and re-enter new criteria.
   - **BACK** – to not submit the report and return to the "Reports Menu" list.
   - **CREATE REPORT** – to display the report output in a new window (sample shown below).

Figure 18-37: VFC Vaccination Breakdown Report

VFC Vaccination Breakdown

Report Criteria **Report Date:** March 23, 2004

IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Facility: All
Vaccination Date Range: All
Birth Date Range: All
Race: All
Health Plan: All
Vaccinator: All
State: All
County/Parish: All
District/Region: All

Selected Total: 0

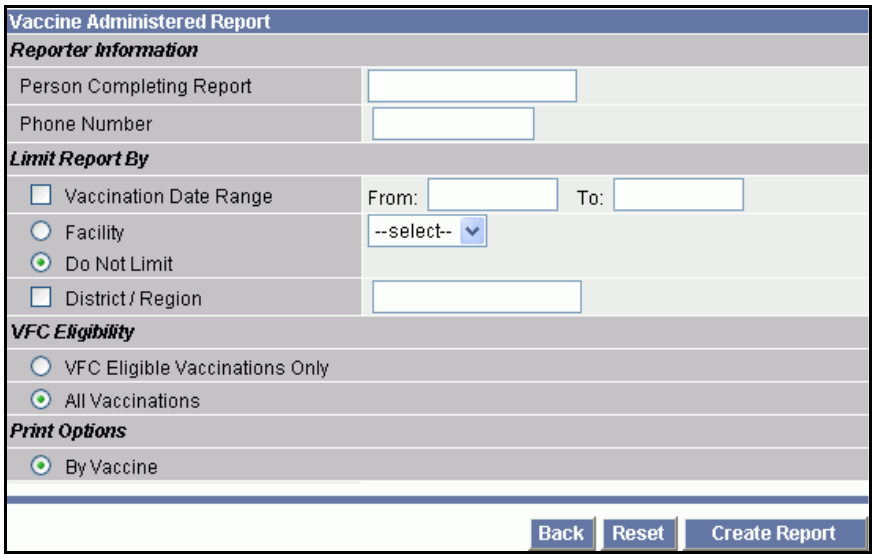
VFC	Total Vaccinations	Percent of Total Selected
KidsCare	0	0.0
Medicaid	0	0.0
Nat. Amer.or Alaskan	0	0.0
Underinsured	0	0.0
Uninsured	0	0.0

VACCINE ADMINISTERED

This report details the number of vaccinations given in each of the different age categories, in alphabetical order by vaccine.

1. From the **VACCINES FOR CHILDREN CATEGORY**, point and click on the **VACCINE ADMINISTERED REPORT**. The report's limitation/selection window appears.

Figure 18-38: Vaccine Administered Report Limitations/Selections



2. Type the **REPORTER INFORMATION** by typing the following:
   - Person Completing the Report
   - Phone Number
3. Type the **FROM** and **TO** dates if you want to limit the report by "**Vaccination Date Range**." The checkbox will automatically get selected after entering the dates.
4. Point and click the drop-down arrow to select to limit by the **Facility**. The radio button automatically will get selected, or point and click the radio button to **NOT LIMIT BY FACILITY**.
5. Type the **District/Region** number. The checkbox will automatically be selected.

6. Point and click on the radio button to select the VFC Eligibility." Select either **VFC ELIGIBLE VACCINATIONS ONLY** or **ALL VACCINATIONS**.

7. Point and click one of the available buttons:

   - **RESET** – to erase newly entered/selected items and re-enter new criteria.
   - **BACK** – to not submit the report and return to the "Reports menu" list.
   - **CREATE REPORT** – to display the report output in a new window (sample shown below).

Figure 18-39: Vaccine Administered Report

Vaccine Administered Report
Includes ALL Vaccination Dates

IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Facility: All
Provider Number:
District / Region: All
Date Submitted: August 30, 2005
Person completing report:
Phone number:

( ) Health Department
( ) Non-Health Department

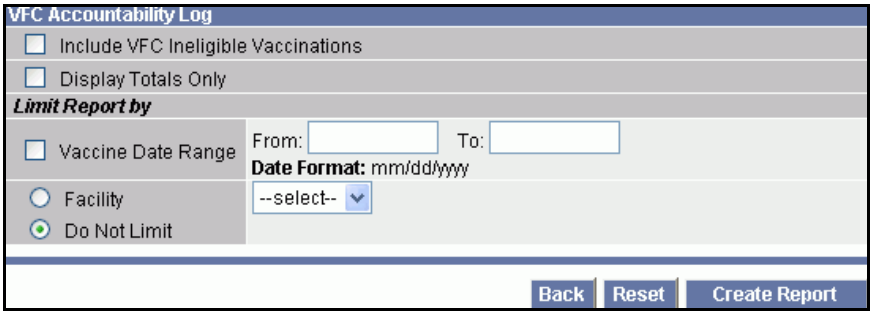
		Months					Years									
Vaccine	Dose #	< 3	3-5	6-7	8-11	12-23	2-3	4-6	7-11	12-13	14-18	19-24	25-44	45-64	65+	Total
DTaP																
	1	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
	2	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
	3	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
	4	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
	Total	0	0	0	0	0	0	0	0	0	0	0	0	0	4	4
Td (Adult)																
	1	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
	Total	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1

VFC ACCOUNTABILITY LOG

This report lists birth and vaccination dates along with VFC and vaccine categories with grand totals.

1. From the **VACCINES FOR CHILDREN** category, point and click on the **VFC ACCOUNTABILITY LOG REPORT**. The report's limitation/selection window appears.

Figure 18-40: VFC Accountability Log Limitations/Selections



2. Point and click the checkbox if you want to "**INCLUDE INELIGIBLE PATIENTS**."

3. Point and click the checkbox if you want to "DISPLAY TOTALS ONLY."

4. Type the **FROM** and **TO** dates for the **VACCINE DATE RANGE**. The checkbox will automatically get selected.

5. Point and click the drop-down arrow to select to limit by the **Facility**. The radio button will automatically be selected, or point and click the radio button to **NOT LIMIT BY FACILITY.**

6. Point and click one of the available buttons:

   - **RESET** – to erase newly entered/selected items and re-enter new criteria.
   - **BACK** – to not submit the report and return to the "Reports Menu" list.
   - **CREATE REPORT** – to display the report output in a new window (sample shown below).

Figure 18-41: Vaccine Accountability Report

Vaccines For Children (VFC) Program
Vaccine Accountability Log for Public Provider/Hospital(Private and Public) Use
IRMS: 1000

VFC Eligibles(0 - 18 years)

Patient Date of Birth	Patient Vacc Date	Medi-caid	Un-insured	Amer Indian or Alaskan	Under-insured	Not Elig	DTaP	DT Peds	TD (>= 7yrold)	Hib	Hep B /Hib	IPV	MMR	Hep B (TF/PF)	Hep B Adult	Hep B 2 Dose	Vari-cella	Hep A 2 Dose	Flu	Flu-nasal
04/04/2002	04/04/2002	x												x						
05/25/2002	01/01/2003	x										x								
09/29/2002	01/01/2003	x										x								
08/28/2000	04/17/2003																			
08/03/1950	04/24/2003	x										x								
06/16/2000	04/29/2003	x																		
06/16/2000	04/30/2003																	x		
		Medi-caid	Un-insured	Amer Indian or Alaskan	Under-insured	Not Elig	DTaP	DT Peds	TD (>= 7yrold)	Hib	Hep B /Hib	IPV	MMR	Hep B (TF/PF)	Hep B Adult	Hep B 2 Dose	Vari-cella	Hep A 2 Dose	Flu	Flu-nasal
Totals		5	0	0	0	0	0	0	0	0	0	3	0	1	0	0	0	1	0	0

*Hep B (TF/PF): Thimerosal Free/Preserv. Free (0-6 months)

SITE INFORMATION REPORTS

Each report's window of limitations and selections is shown individually under the report's title.

PROGRAMS

This report lists all of the programs used by the state and their status (inactive or active).

From the **SITE INFORMATION CATEGORY**, point and click on the **PROGRAMS REPORT**. The report immediately appears in a separate browser providing the option to print (sample shown below).

Figure 18-42: Programs Report

Programs

Name	Inactive	Report Date: April 24, 2003
MEDICARE		
PASPORT		
WIC		

HEALTH PLANS

This report lists all of the health plans used by the state and their status (active, inactive and whether they use Medicaid).

From the **SITE INFORMATION CATEGORY**, point and click on the **HEALTH PLANS REPORT**. The report immediately appears (sample shown below).

Figure 18-43: Health Plans Report

Health Plans

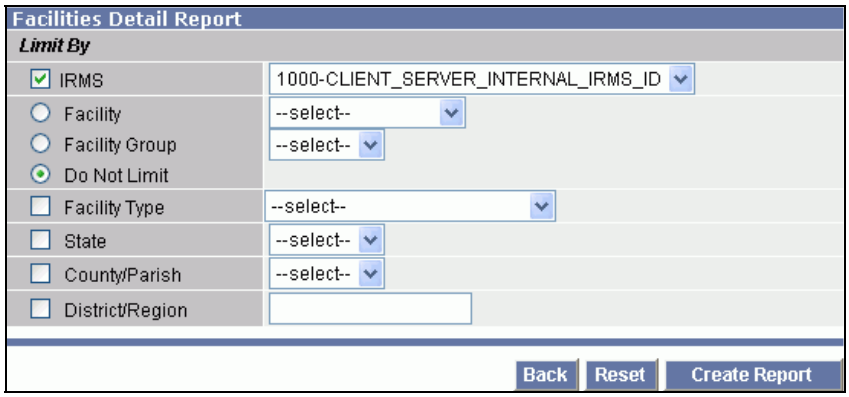
Name	Medicaid	Inactive	Report Date: April 24, 2003
AETNA			
BLUE CROSS			

FACILITIES DETAIL

This report lists all of the facilities, street addresses, city, state, zip code, phone number, fax number, and inactive or active status.

1. From the **SITE INFORMATION CATEGORY**, point and click on the **FACILITIES DETAIL REPORT**. The report's limitation/selection window appears.

Figure 18-44: Facilities Detail Limitations/Selections



2. Point and click the drop-down arrow to view/select by the following:

- IRMS - To limit the report by a specific IRMS.
- **Facility, Facility Group, Do NOT LIMIT** – to limit the report by a specific facility or facility group. The radio button will automatically be selected, or point and click the radio button to **NOT LIMIT BY FACILITY**.
- **Facility Type** – to limit the report by a specific facility type.
- **State** – to limit the report by a specific state. You must select a state before selecting a county/parish.
- **County/Parish** – to limit the report by a specific county or parish. You must select a state before selecting a county/parish.

Note: After making a selection, the checkbox or radio button will automatically get selected.

3. If desired, type the **DISTRICT/REGION**. This is a whole number. As soon as data is entered, the checkbox will automatically get selected.

4. Point and click one of the available buttons:

   - **RESET** - to erase newly entered/selected items and re-enter new criteria
   - **CREATE REPORT** - to display the report output in a new window (sample shown below).

Figure 18-45: Facilities Detail Report

Facilities Detail

Report Criteria: **Report Date:** March 23, 2004

IRMS:	1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Facility:	All
State:	All
District/Region:	All
County/Parish:	All

Total Facilities: 3

Name	Street Address	City	State	ZIP Code	Phone Number	Fax	Inactive
STC	67 E WELDON	PHOENIX	AZ	85012	(602)241-1502	(602)241-1856	
TEST HOSPITAL CMG1	1 MAIN STREET	BATON ROUGE	LA	70813	(123)345-6789	(123)456-7777	
TEST							

PHYSICIAN/VACCINATOR DETAIL

This report lists the physicians and/or vaccinators names along with their types (physician, vaccinator, or both) in the facility.

1. From the **SITE INFORMATION CATEGORY**, point and click on the **PHYSICIAN/VACCINATOR DETAIL REPORT**. The report's limitation/selection window appears.

Figure 18-46: Physician/Vaccinator Detail Limitations/Selections

Physician/Vaccinator Detail Report

Limit By

☐ Primary Care Physician	--select--
☐ Vaccinator	--select--
○ Facility	--select--
◉ Do Not Limit	
☐ State	--select--
☐ County/Parish	--select--
☐ District/Region	

Back Reset Create Report

2. If desired, point and click on the drop-down arrow to select the **PRIMARY CARE PHYSICIAN**.

3. If desired, point and click on the drop-down arrow to select the **VACCINATOR**.
4. Point and click the drop-down arrow to select to limit by the **Facility**. The radio button will automatically be selected, or point and click the radio button to **NOT LIMIT BY FACILITY**.
5. If desired, point and click on the drop-down arrow to select the **STATE**.
6. If desired, point and click on the drop-down arrow to select the **COUNTY/PARISH**.
7. If desired, type the **DISTRICT/REGION**. This is a whole number. As soon as data is entered, the checkbox will automatically get selected.
8. Point and click one of the available buttons:
   - **RESET** – to erase newly entered/selected items and re-enter new criteria.
   - **BACK** – to not submit the report and return to the "Reports Menu" list.
   - **CREATE REPORT** – to display the report output in a new window (sample shown below).

Figure 18-47: Physician/Vaccinator Detail Report

Physician/Vaccinator Detail

Report Criteria: **Report Date:** March 23, 2004

IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Facility: All
Primary Care Physician: All
Vaccinator: All
State: All
County/Parish: All
District/Region: All

Physician/Vaccinator Total: 2

First Name	Middle Name	Last Name	Suffix	Bomex	DO	Phone	Fax	Inactive	Type
MARCIA		BRADY							V
PVFNAME	PVMNAME	PVLNAME				(123)345-6789	(234)567-8901		B

REGISTRY REPORTS

The following Registry reports can be run immediately or can be scheduled.

- Daily Status

- Provider Submission
- Provider Response
- Weekly Status
- Updated Patients/Vaccinations
- Registry Statistics
- Registry Status Report

Refer to the major section titled, "Using the Scheduler to Obtain Reports" for instructions; otherwise, the instructions listed here are to submit the report immediately.

It highly recommended that these reports be scheduled.

DAILY STATUS

This report requires the date to be entered.

Note: If this report is scheduled, the fax option is available if your state is configured to use it.

1. Click on the **REPORT TITLE**. The report's limitation/selection window appears.

Figure 18-48: Daily Status Report Limitations/Selections

2. Type the date of the report you want to submit using the format mmddyyyy.

3. Click one of the available buttons:

- **CANCEL** – to NOT send the report and
- **VIEW REPORT** – to display the report in a new browser window with the option of printing.

Figure 18-49: Daily Status Report

Daily Status Report

March 23, 2004

Cumulative Totals

Patients in registry	35
Ages 0 - 11 months	0
Ages 12 - 23 months	0
Ages 24 - 35 months	0
Ages 35 - 59 months	33
Ages 60 - 71 months	0
Ages 6 - 18 years	0
Ages > 18 years	2
Patients in registry without vaccinations	1
Ages 0 - 11 months	0
Ages 12 - 23 months	0
Ages 24 - 35 months	0
Ages 35 - 59 months	0
Ages 60 - 71 months	0
Ages 6 - 18 years	0
Ages > 18 years	1
Vaccinations	136
IRMS's (Total)	2
IRMS's (Public)	0
IRMS's (Private)	0

Previous Day Totals

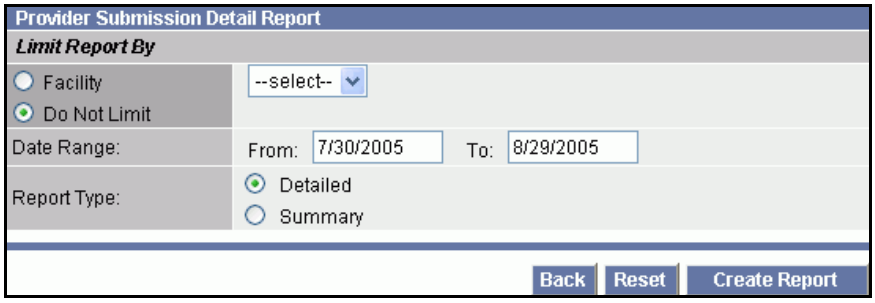
Patients added to registry	67
Vaccinations added to registry	141
IRMS's submitting	1
Facilities submitting	3

PROVIDER SUBMISSION DETAIL

This report shows a detailed account of IRMS/Facility patient and vaccination imports during a specified period. It will show import counts for all IRMS's/Facilities selected by date. The report is available for all users with reporting access but is limited to the specific user's IRMS/Facility/Facility Group. This report is also available through the Schedule Reports option. When using the Scheduled Report option, it is capable of running for last day, last 7 days, or last 30 days versus a pre-set date range.

1. Click on the report's title. The report's "Limitations/Selections" window appears.

Figure 18-50: Provider Submission Detail Limitations/Selections



2. If you want to limit the report by IRMS, click the drop-down menu arrow to select a valid choice. The IRMS checkbox will automatically get checked after making a selection.

3. If you want to limit the report by Facility, click the drop-down menu arrow or leave the Do Not Limit radio button selected.

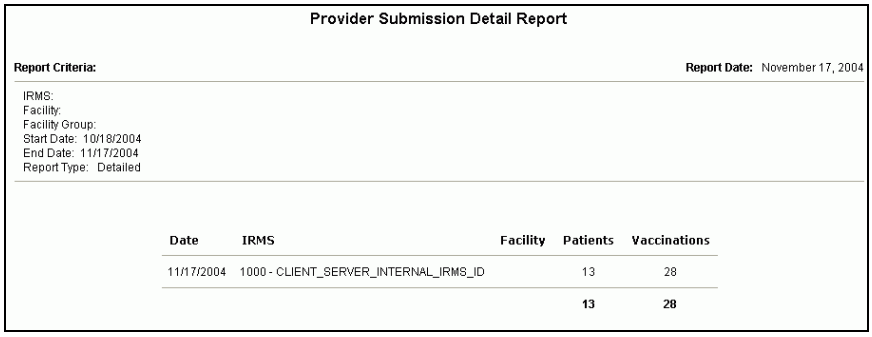
4. To limit the report by a specific Date Range, type the **FROM** and **TO** dates using the format mmddyyyy.

5. In the **REPORT TYPE** section, click on the Detailed or Summary radio button.

6. Click one of the available buttons:

   - **BACK** – to not submit the report and return to the "Reports Menu" list.
   - **RESET** – to erase the newly made selections
   - **CREATE REPORT** – to run the report and display in a new browser window similar to the one shown below.

Figure 18-51: Provider Submission Detail Report



Provider Submission Detail Report

Report Criteria: **Report Date:** November 17, 2004

IRMS:
Facility:
Facility Group:
Start Date: 10/18/2004
End Date: 11/17/2004
Report Type: Detailed

Date	IRMS	Facility	Patients	Vaccinations
11/17/2004	1000 - CLIENT_SERVER_INTERNAL_IRMS_ID		13	28
			13	**28**

7. Either **PRINT** the report or **CLOSE** the browser window.

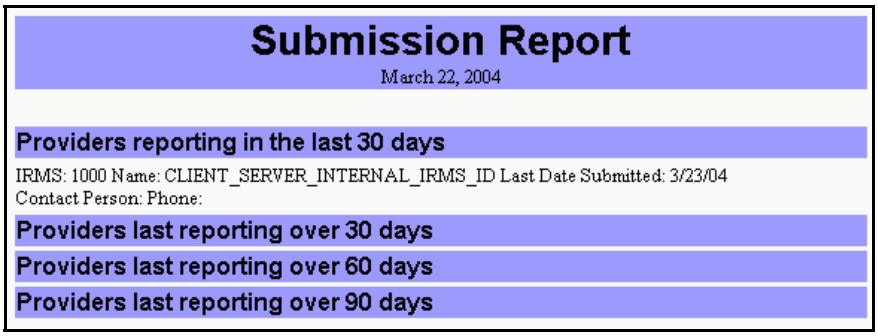
PROVIDER SUBMISSION

This report reveals information about the submitting providers:

- Providers reporting in the last 30 days
- Providers last reporting over 30 days
- Providers last reporting over 60 days
- Providers last reporting over 90 days

1. Click on the Report's title.
2. The report immediately displays in a new browser window providing the option to print.

Figure 18-52: Provider Submission Report



PROVIDER RESPONSE

This report reveals the provider's responses from each IRMS.

1. Click on the report's title. The report's limitation/selection window appears.

Figure 18-53: Provider Response Report Limitations/Selections

2. Click the drop-down arrow to select the **IRMS**.
3. Click one of the available buttons:
   - **CANCEL** – to not run the report and exit to the Reports menu.

- **VIEW REPORT** – to run the report and display it in a new browser window with the option of printing.

A sample of this report was not available for this release.

WEEKLY STATUS

This report requires the end of week to be entered.

Note: If this report is scheduled, the fax option is available if your state is configured to use it.

1. Click on the report's title. The report's limitation/selection window appears.

Figure 18-54: Weekly Status Report Limitations/Selections

2. Type the **week ending** using the format mmddyyyy.
3. Click one of the available buttons:
   - **CANCEL** – to not run the report and exit to the Reports menu.
   - **VIEW REPORT** – to run the report and display it in a new browser window with the option of printing.

Figure 18-55: Weekly Status Report

Weekly Status Report

March 16, 2004 to March 23, 2004

Cumulative Totals

Patients in registry	35
Ages 0 - 11 months	0
Ages 12 - 23 months	0
Ages 24 - 35 months	0
Ages 35 - 59 months	33
Ages 60 - 71 months	0
Ages 6 - 18 years	0
Ages > 18 years	2
Patients in registry without vaccinations	1
Ages 0 - 11 months	0
Ages 12 - 23 months	0
Ages 24 - 35 months	0
Ages 35 - 59 months	0
Ages 60 - 71 months	0
Ages 6 - 18 years	0
Ages > 18 years	1
Vaccinations	136
IRMS's (Total)	2
IRMS's (Public)	0
IRMS's (Private)	0

Previous Week Totals

Patients added to registry	67
Vaccinations added to registry	141
IRMS's submitting	1
Facilities submitting	3

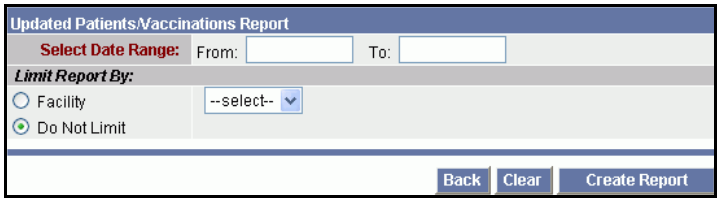
UPDATED PATIENTS/VACCINATIONS

This report will show the total number of patients/vaccinations added/updated over a particular date range by a particular IRMS (if you are a Registry Client user).

Note: This report uses the "update stamp" on the patient and vaccination database tables.

1. Click on the **REPORT TITLE**. The report's limitation/selection window appears.

Figure 18-56: Updated Patients/Vaccination Report Limitations/Selections

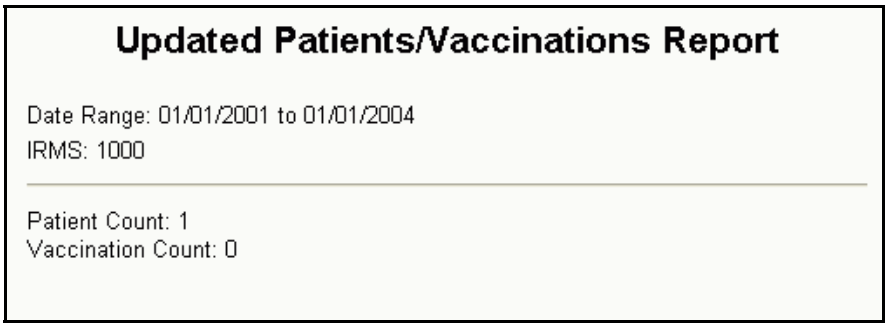


2. Type the **FROM** and **TO** date for the "Select Date Range" for which the report is going to be run. Use the date format of mmddyyyy.

3. Click one of the available buttons:

   - **BACK** – to not submit the report and return to the "Reports Menu" list.
   - **CLEAR** – to erase any entries made and remain on the window.
   - **CREATE REPORT** – to display the report in a new browser window providing the option to print.

Figure 18-57: Updated Patients/Vaccinations Report



REGISTRY STATISTICS

This report will display registry-wide statistics to determine the size of the registry (number of patients and vaccinations) and the number of providers participating. This report can take some time to display, so you can either **RUN** it now or **SCHEDULE** it to run later. Refer to the section titled, "Using the Scheduler" or continue with these instructions to run the report now.

1. From the **REGISTRY CATEGORY**, point and click on the **REPORT TITLE,** a dialog box appears.

Figure 18-58: Generating Report Dialog Box

2. Eventually the report displays providing the option to print.

Figure 18-59: Registry Statistics Report

Registry Statistics

Patient Totals:	
Total Number of Patients:	8622
Total Number of Patients 0-2 years:	347
Total Number of Patients 2-6 years:	796
Total Number of Patients 6-18 years:	1064
Total Number of Patients with no shots:	8605
Total Number of Patients with two or more shots:	12
Total Number of New Births Since Jan. 1:	10
Total Number of Patients by Inactive Status:	
Active	8620
Address Incorrect	1
Moved or Gone Elsewhere	1
Vaccination Totals:	
Total Number of Vaccinations:	36
Total Number of Vaccines for Patients 0-2 years:	16
Total Number of Vaccines for Patients 2-6 years:	9
Total Number of Vaccines for Patients 6-18 years:	0
Provider Totals:	
Total Number of Providers:	
Undefined Site Type:	3

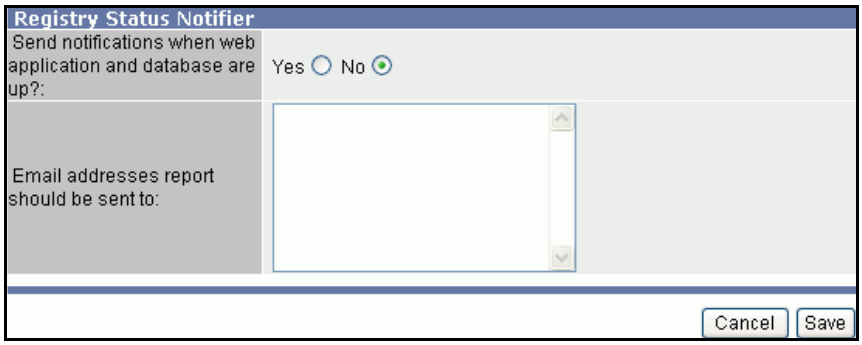
REGISTRY STATUS REPORT

This is a report that will notify the Registry Client when the database and/or web server is down. This utilizes the UFM

module and "polls" the web application and database server to see if they are both up and running. An email is sent to the IT and Immunization Program staff indicating that either one of the systems are down. The user has the option of selecting the type of email.

1. From the **REGISTRY CATEGORY**, point and click on the **REPORT TITLE.** The "Registry Status Notifier" limitation window appears.

Figure 18-60: Registry Status Notifier Limitations/Selections



2. In the "Send Notifications when Web Application and database are up" section, click either radio button:
   - **YES –** Indicates an email is sent every time the UFM polls to see if the application and server are up.
   - **NO** – Indicates an email is sent **ONLY** when the web application or database server go down.
3. In the "**Email Addresses report should be sent to**" section, type the entire address of the person that should receive the notification.
4. Click one of the available buttons:
   - **CANCEL** – to NOT save any selections or entries made, and return to the "Reports Module" list.
   - **SAVE** – to save selections or entries made, and return to the "Reports Module" list.

QUALITY REPORTS

These reports are used to determine the quality of information that is being entered.

Note: It is recommended when possible, to SCHEDULE these reports when running against a large database. If this report is scheduled, the fax option is available if your state is configured to use it.

DATA QUALITY BY IRMS

This report lists the data elements missing from **patient** and **vaccination** records by **IRMS** and/or **FACILITY**. Specific patient **details** can be viewed after the report is displayed by clicking on the "details" hyperlink.

1. Click on the **report's title**. The report's limitations window appears with the default IRMS ID.

Figure 18-61: Data Quality Report by IRMS Limitations/Selections

2. Click one of the available buttons:

- **BACK** – to not submit the report and return to the “Reports Menu” list.
- **CREATE REPORT** – to display the report in a separate browser window providing the option to print. The report appears similar to the one shown below.

Figure 18-62: Data Quality Report by IRMS

Registry Data Quality Report
March 23, 2004

CLIENT_SERVER_INTERNAL_IRMS_ID 1000
Facility Not Specified

Patient Data Quality details

There are 35 patient(s) associated with this facility.

The following shows the percent and number of data elements that are missing from the patient records.

Address		
Street	0%	(0)
City	0%	(0)
State	0%	(0)
Phone	3%	(1)
Patient Middle Name	100%	(35)
Gender	3%	(1)
Social Security Number (SSN)	3%	(1)
Medicaid Number	6%	(2)
Mothers Maiden Name	100%	(35)
Guardian First Name	3%	(1)
Guardian Middle Name	100%	(35)
Guardian Last Name	100%	(35)
County	100%	(35)

The following shows the percent and number of data elements that are present in the patient records.

Inactive Code
VFC Eligibility

Vaccination Data Quality

There are 100 vaccination(s) associated with this facility.

The following shows the percent and number of data elements that are missing from the vaccination records.

Lot Number	100%	(100)
Manufacturer	100%	(100)
Vaccinator	100%	(100)

The following shows the percent and number of data elements that are present in the vaccination records.

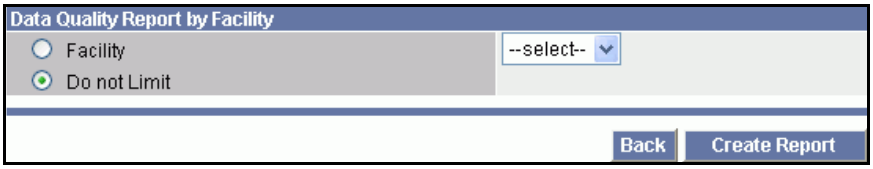
VFC Eligibility

DATA QUALITY BY FACILITY

This report lists the data elements missing from **patient** and **vaccination** records by FACILITY. Specific patient **details** can be viewed after the report is displayed by clicking on the "details" hyperlink.

1. Click on the **report's title**. The report's limitations window appears.

Figure 18-63: Data Quality Report by Facility Limitations/Selections

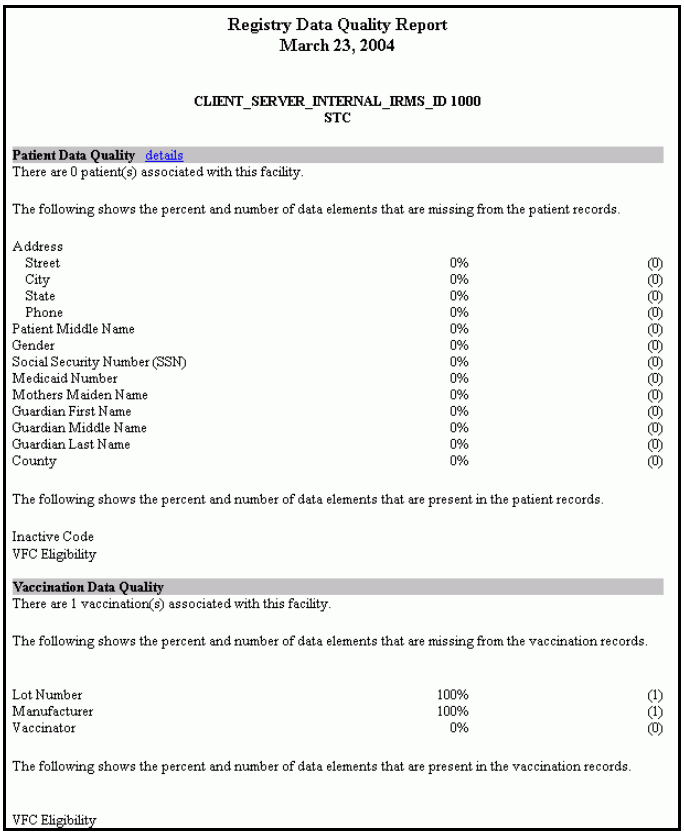


2. Click on the drop-down arrow and select a **FACILITY**. The Facility radio button will automatically get selected; or leave the default of **DO NOT LIMIT** selected to view all facilities.

3. Click one of the available buttons:

- **BACK** – to not submit the report and return to the Reports Menu" list.
- **CREATE REPORT** – to display the report in a separate browser window providing the option to print. The report appears similar to the one shown below.

Figure 18-64: Data Quality Report by Facility Report



Registry Data Quality Report
March 23, 2004

CLIENT_SERVER_INTERNAL_IRMS_ID 1000
STC

Patient Data Quality details

There are 0 patient(s) associated with this facility.

The following shows the percent and number of data elements that are missing from the patient records.

Address		
Street	0%	(0)
City	0%	(0)
State	0%	(0)
Phone	0%	(0)
Patient Middle Name	0%	(0)
Gender	0%	(0)
Social Security Number (SSN)	0%	(0)
Medicaid Number	0%	(0)
Mothers Maiden Name	0%	(0)
Guardian First Name	0%	(0)
Guardian Middle Name	0%	(0)
Guardian Last Name	0%	(0)
County	0%	(0)

The following shows the percent and number of data elements that are present in the patient records.

Inactive Code
VFC Eligibility

Vaccination Data Quality

There are 1 vaccination(s) associated with this facility.

The following shows the percent and number of data elements that are missing from the vaccination records.

Lot Number	100%	(1)
Manufacturer	100%	(1)
Vaccinator	0%	(0)

The following shows the percent and number of data elements that are present in the vaccination records.

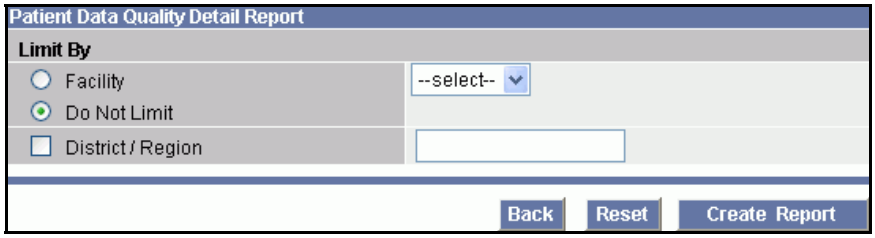
VFC Eligibility

PATIENT DATA QUALITY DETAIL

This report lists patient records with incomplete information.

1. Click on the report's title. The report's limitation/selection window appears.

Figure 18-65: Patient Data Quality Detail Limitations/Selections



2. Click the drop-down arrow to select the **IRMS** or leave the default radio button selected for **DO NOT LIMIT**.
3. Click the drop-down arrow to select the **FACILITY** or leave the default radio button selected for **DO NOT LIMIT**.
4. Type the **DISTRICT/REGION** to limit the report further. The checkbox will automatically get selected.
5. Click one of the available buttons:
   - **RESET** – to not submit the report and erase the selected limitations.
   - **BACK** – to not submit the report and return to the "Reports" menu window.
   - **CREATE REPORT** – to submit the report and display in a new browser providing the option to print.

Figure 18-66: Patient Data Quality Detail Report

Registry Patient Data Quality Detail Report
March 23, 2004

This Patient Data Quality Detail Report is used to enable identification of the patient records with incomplete information.

FACILITY UNDEFINED

ALDAMA, MISTY DOB:01/21/2001

MISSING VALUES: ADDRESS_STREET2, PHYSICAL_ADDRESS, MOTHER_MAIDEN, GRD_MIDDLE_NAME, GRD_LAST_NAME, COUNTY_CODE, PAT_MIDDLE_NAME,

ALTSTADTER, BRANDY DOB:01/08/2001

MISSING VALUES: ADDRESS_STREET2, PHYSICAL_ADDRESS, MOTHER_MAIDEN, GRD_MIDDLE_NAME, GRD_LAST_NAME, COUNTY_CODE, PAT_MIDDLE_NAME,

BAKER, TIM DOB:01/09/2001

MISSING VALUES: ADDRESS_STREET2, PHYSICAL_ADDRESS, MOTHER_MAIDEN, GRD_MIDDLE_NAME, GRD_LAST_NAME, COUNTY_CODE, PAT_MIDDLE_NAME,

BARKER, BOB DOB:01/01/1935

MISSING VALUES: ADDRESS_STREET2, PHYSICAL_ADDRESS, ADDRESS_PHONE, PAT_GENDER, MOTHER_MAIDEN, GRD_MIDDLE_NAME, GRD_LAST_NAME, COUNTY_CODE, PAT_MIDDLE_NAME, PAT_SSN, PAT_MEDICAID_NUM,

VACCINATION DATA QUALITY

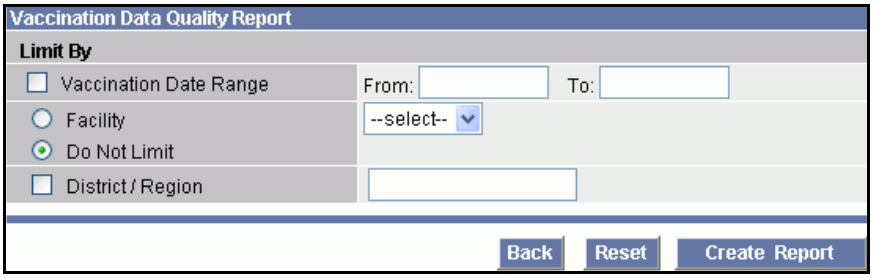
This report summarizes vaccinations given outside the recommended administration age, and orphaned/invalid vaccinations that are invalid due to the vaccination date falling before the patient's date of birth. Administered vaccinations that were given from unspecified vaccine types (e.g., Hib-Unspecified) are also included.

Note: This report should be scheduled when running on large datasets because of the time it takes to run the report.

After the report is displayed, additional details can be viewed by clicking on the "**details**" hyperlink that displays the "Vaccination Data Quality Details" report.

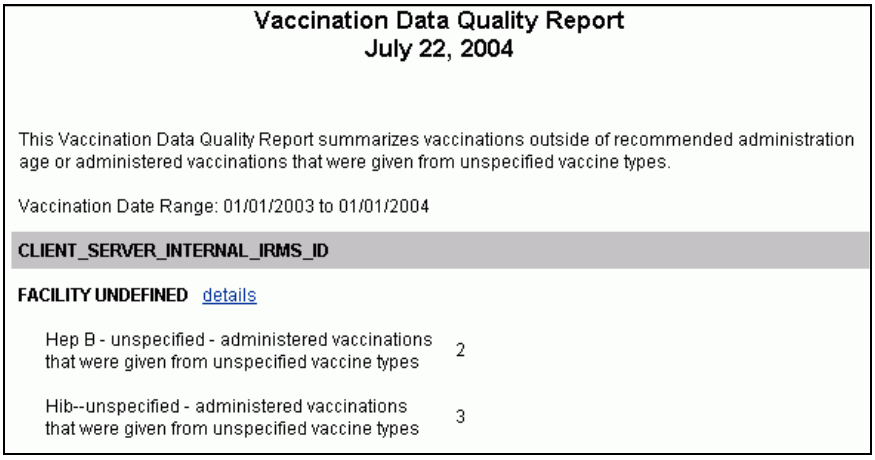
1. Click on the **report's title**. The report's limitation/selection window appears.

Figure 18-67: Vaccination Data Quality Report Limitations/Selections



2. Type the **Vaccine Date Range** in the **FROM** and **TO** fields using the format mmddyyyy.
3. Click the drop-down arrow to select an **IRMS** or leave the default radio button selected for **DO NOT LIMIT**.
4. Click the drop-down arrow to select a **FACILITY** or leave the default radio button selected for **DO NOT LIMIT**.
5. Type the **DISTRICT/REGION** to limit the report further. The checkbox will automatically get selected.
6. Click one of the available buttons:
   - **RESET** – to not submit the report and erase the selected limitations.
   - **BACK** – to not run the report and return to the "Reports" menu window.
   - **CREATE REPORT** – to submit the report and display in a new browser providing the option to print.

Figure 18-68: Vaccination Data Quality Report



7. To view the details, click on the **DETAILS** hyperlink. The "Vaccination Data Quality Detail" report displays. Refer to the next report for an illustration.

VACCINATION DATA QUALITY DETAIL

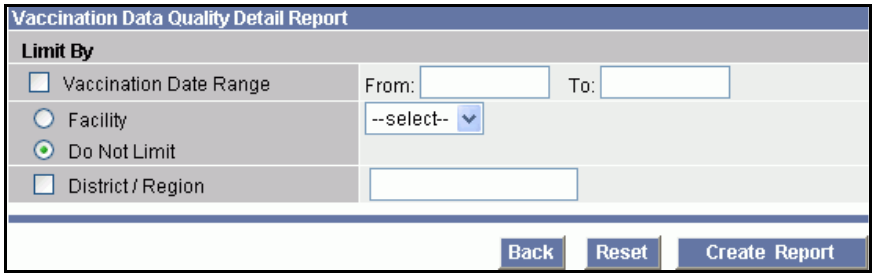
This report summarizes vaccinations given outside the recommended administration age, and orphaned/invalid vaccinations that are invalid due to the vaccination date falling before the patient's date of birth. Administered vaccinations that were given from unspecified vaccine types (e.g., Hib-Unspecified) are also included.

After the report is displayed, additional details can be viewed by clicking on the "**details**" hyperlink.

Note: This report should be scheduled when running on large datasets because of the time it takes to run the report.

1. Click on the report's title. The report's limitation/selection window appears.

Figure 18-69: Vaccination Data Quality Detail Limitations/Selections



2. Type the Vaccine date range in the **FROM** and **TO** fields using the format mmddyyyy. Press the TAB key.
3. Click the drop-down arrow to select an **IRMS** or leave the default radio button selected for **DO NOT LIMIT**.
4. Click the drop-down arrow to select a **FACILITY** or leave the default radio button selected for **DO NOT LIMIT**.
5. Click one of the available buttons:
   - **RESET** – to not submit the report and erase the selected limitations.

- **BACK** – to not submit the report and return to the "Reports" menu window.
- **CREATE REPORT** – to submit the report and display in a new browser providing the option to print.

Figure 18-70: Vaccination Data Quality Detail Report

Vaccination Data Quality Detail Report
July 22, 2004

This Vaccination Data Quality Detail Report is used to enable identification of the patient and vaccination records which were outside of the administration age or administered vaccinations that were given from unspecified vaccine types.

Vaccination Date Range: 01/01/2003 to 01/01/2004

IRMS	SIIS Patient #	Patient Name	Patient DOB	Vaccine	Error	Vacc Date
FACILITY UNDEFINED						
1000	122718	DUCK, DAFFY	10/01/2003	Hib--unspecified	Hib--unspecified - administered vaccinations that were given from unspecified vaccine types	12/01/2003
1000	122730	HASEGAWA, ASHTON	10/20/2003	Hep B - unspecified	Hep B - unspecified - administered vaccinations that were given from unspecified vaccine types	10/21/2003
1000	122730	HASEGAWA, ASHTON	10/20/2003	Hep B - unspecified	Hep B - unspecified - administered vaccinations that were given from unspecified vaccine types	11/23/2003
1000	43985	JONES, LILLY	04/27/2003	Hib--unspecified	Hib--unspecified - administered vaccinations that were given from unspecified vaccine types	09/16/2003
1000	43985	JONES, LILLY	04/27/2003	Hib--unspecified	Hib--unspecified - administered vaccinations that were given from unspecified vaccine types	11/25/2003

ADMINISTRATIVE REPORTS (SECURITY MODULE)

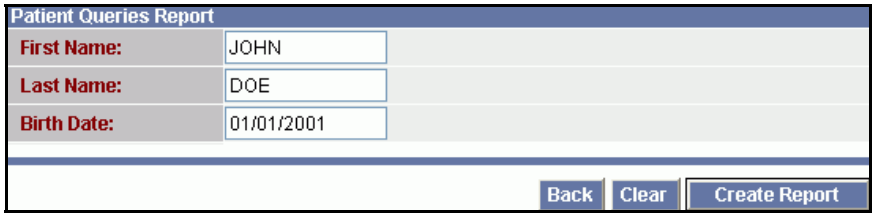
The Administrative reports are only available to those that have the **Security Module**.

PATIENT QUERIES

This report is used to locate the user(s) who have performed queries on a specific patient.

1. From the **ADMINISTRATIVE CATEGORY**, point and click on the **PATIENT QUERIES REPORT**. The report's limitation/selection window appears.

Figure 18-71: Patient Queries Report Limitations/Selections



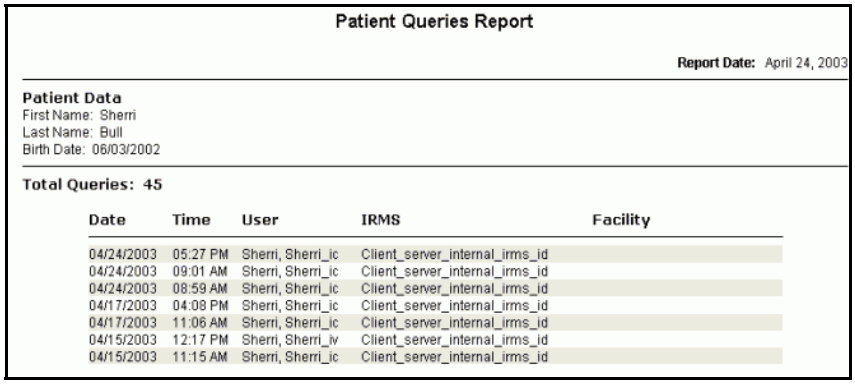
2. If a patient wasn't previously selected, you must type in the following "red" fields of information:

- First Name
- Last Name
- Birth Date

3. Point and click one of the available buttons:

- **CLEAR**–to erase newly entered text.
- **BACK** – to not submit the report and return to the "Reports Menu" list.
- **CREATE REPORT** – to display the report output in a new window (sample shown below).

Figure 18-72: Patient Queries Report



Patient Queries Report

Report Date: April 24, 2003

Patient Data
First Name: Sherri
Last Name: Bull
Birth Date: 06/03/2002

Total Queries: 45

Date	Time	User	IRMS	Facility
04/24/2003	05:27 PM	Sherri, Sherri_ic	Client_server_internal_irms_id	
04/24/2003	09:01 AM	Sherri, Sherri_ic	Client_server_internal_irms_id	
04/24/2003	08:59 AM	Sherri, Sherri_ic	Client_server_internal_irms_id	
04/17/2003	04:08 PM	Sherri, Sherri_ic	Client_server_internal_irms_id	
04/17/2003	11:06 AM	Sherri, Sherri_ic	Client_server_internal_irms_id	
04/15/2003	12:17 PM	Sherri, Sherri_iv	Client_server_internal_irms_id	
04/15/2003	11:15 AM	Sherri, Sherri_ic	Client_server_internal_irms_id	

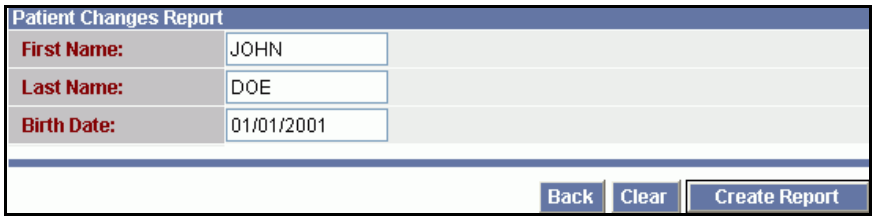
PATIENT CHANGES REPORT

The **Patient Changes Report** requires the same criteria as the Patient Queries report.

This report is an audit trail and lists what was changed for a specific patient, the user that made the change, date and time stamp, etc.

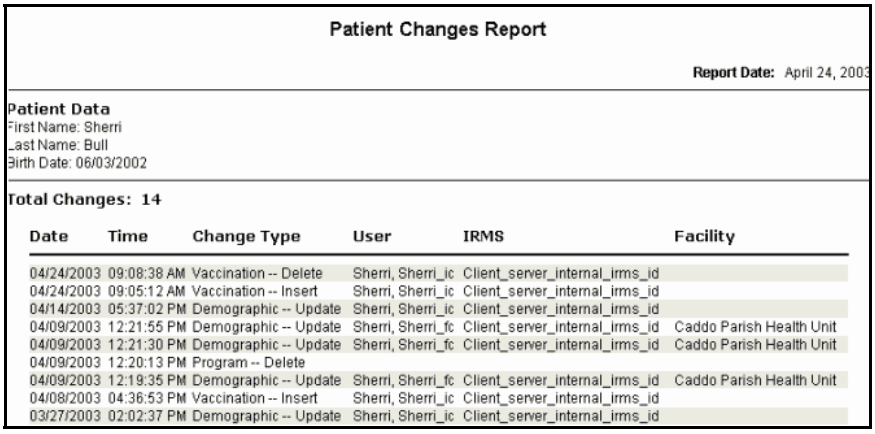
1. From the **ADMINISTRATIVE CATEGORY**, point and click on the **PATIENT CHANGES REPORT**. The report's limitation/selection window appears.

Figure 18-73: Patient Changes Report Limitations/Selections



2. If a patient wasn't previously selected, you must type in the following "red" fields of information:
   - First Name
   - Last Name
   - Birth Date
3. Point and click one of the available buttons:
   - **CLEAR** – to erase newly entered text.
   - **BACK** – to not submit the report and return to the "Reports Menu" list.
   - **CREATE REPORT** – to display the report output in a new window (sample shown below).

Figure 18-74: Patient Changes Report



Patient Changes Report

Report Date: April 24, 2003

Patient Data
First Name: Sherri
Last Name: Bull
Birth Date: 06/03/2002

Total Changes: 14

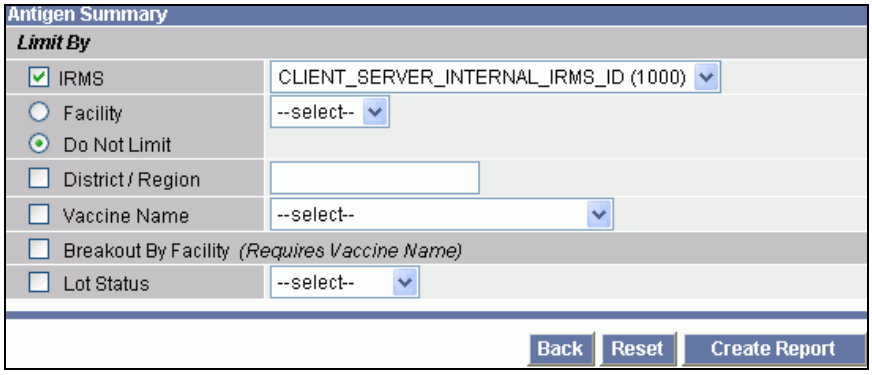
Date	Time	Change Type	User	IRMS	Facility
04/24/2003	09:08:38 AM	Vaccination -- Delete	Sherri, Sherri_ic	Client_server_internal_irms_id	
04/24/2003	09:05:12 AM	Vaccination -- Insert	Sherri, Sherri_ic	Client_server_internal_irms_id	
04/14/2003	05:37:02 PM	Demographic -- Update	Sherri, Sherri_ic	Client_server_internal_irms_id	
04/09/2003	12:21:55 PM	Demographic -- Update	Sherri, Sherri_fc	Client_server_internal_irms_id	Caddo Parish Health Unit
04/09/2003	12:21:30 PM	Demographic -- Update	Sherri, Sherri_fc	Client_server_internal_irms_id	Caddo Parish Health Unit
04/09/2003	12:20:13 PM	Program -- Delete			
04/09/2003	12:19:35 PM	Demographic -- Update	Sherri, Sherri_fc	Client_server_internal_irms_id	Caddo Parish Health Unit
04/08/2003	04:36:53 PM	Vaccination -- Insert	Sherri, Sherri_ic	Client_server_internal_irms_id	
03/27/2003	02:02:37 PM	Demographic -- Update	Sherri, Sherri_ic	Client_server_internal_irms_id	

ANTIGEN SUMMARY

This report displays each vaccine and the number of doses remaining.

1. Click on the **report's title**. The report's limitation/selection window appears.

Figure 18-75: Antigen Summary Limitations/Selections



2. To limit the report by **IRMS**, click the drop-down menu arrow to view/select a valid choice.
3. To limit the report by **FACILITY**, click the drop-down menu arrow to view/select a valid choice. The radio button will automatically select; otherwise, the report will not be limited by Facility and the "Do Not Limit" radio button remains chosen.
4. To limit the report by **DISTRICT/REGION**, type the number in the field. The checkbox will automatically select.
5. To limit the report by **VACCINE NAME**, click the drop-down menu arrow to view/select a valid choice.
6. **FACILITY**, or **VACCINE NAME**, click on the drop-down menu arrow to view/select a valid choice or leave the -select- chosen to retrieve ALL.
7. Click the **BREAKOUT BY FACILITY** checkbox to group the data by facility.
   - You MUST choose a **VACCINE NAME** with this option.
   - The report column will display Facility versus Vaccine Name.
8. To limit the report by **LOT STATUS**, click the drop-down menu arrow to view/select a valid choice.
   - Example lot statuses are **ACTIVE** or **INACTIVE**.

9. Click one of the available buttons:

- **BACK** – to not submit a report and return to the previous window.
- **RESET** – to not submit the report and erase the selected limitations.
- **CREATE REPORT** – to submit the report and display in a new browser providing the option to print

Figure 18-76: Antigen Summary/Lot Number Totals Report

Lot Number Totals

Report Criteria: **Report Date:** January 27, 2004

IRMS:	All
Facility:	All
Vaccine Name:	All

Vaccine Name	Doses Remaining
Anthrax	481
Smallpox	388
Diluent	1097

USAGE TRACKING

This report lists the users that have not accessed or logged into SIIS and separates the users into four categories—Within 2 weeks, 30 days, 60 days, and 90 days.

The report lists the county, facility, and username for each category.

The report immediately appears after clicking on the title and appears similar to the one shown below.

Figure 18-77: Usage Tracking Report

Usage Tracking

Report Date: March 23, 2004

Users Not Accessing SIIS within 2 weeks:

County	Facility Name	Username
		JUDY

Users Not Accessing SIIS within 30 days:

County	Facility Name	Username

Users Not Accessing SIIS within 60 days:

County	Facility Name	Username

Users Not Accessing SIIS within 90 days:

County	Facility Name	Username
MARICOPA	STC	SHANNON_FC SHANNON_IC

BAD LOGINS

This report is used to list the number of times a user attempted to login unsuccessfully. It shows the username, password entered, the login error, IP Address, and date/time stamp of the occurrence.

1. Click the report's title. The report's limitation/selection window appears.

Figure 18-78: Bad Login Limitations/Selections

Bad Login Report

From: 03/16/2004 To: **Today**

Cancel | View Report

2. Type the date in the **FROM** field using the format mmddyyyy.
3. Click one of the available buttons:
   - **CANCEL** – to not submit the report and return to the menu window.
   - **VIEW REPORT** – to submit the report in a new browser window providing the option to print.

Figure 18-79: Bad Login Report

IWeb Security Module - Bad Login Attempts

From: 03/17/2004 00:00 To: 03/23/2004 17:21

User Name Attempted	Password Attempted	Login Error	IP Address	Time/Date Stamp
TEST1	TREST1	INVALID LOGIN NAME OR PASSWORD	CHRISJ.PHX.STCH	03/23/2004 08:15
CHRIS_IC	CHIRS_IC	INVALID LOGIN NAME OR PASSWORD	CHRISJ.PHX.STCH	03/23/2004 09:30
SHERRI_IC	SHSERRI_IC	INVALID LOGIN NAME OR PASSWORD	SHERRIBULL.PHX.	03/23/2004 12:22
SHERRI_IC	IC	INVALID LOGIN NAME OR PASSWORD	SHERRIBULL.PHX.	03/23/2004 12:23
MARK_RC	MARKRC	INVALID LOGIN NAME OR PASSWORD	TUN12-MGROTHE.T	03/23/2004 12:31

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19 STATE REPORTS

Each state will have custom reports built for them. Depending on the amount of time it takes to run the report, some of them can be "scheduled" to run at a later time. The reports that can be "scheduled" to run will have a **SCHEDULE** button to the right of the report's title. Refer to the section titled "Using the Scheduler" under the **REPORTS** topic for instructions for setting up the report.

1. From the **REPORTS** menu, point and click on the **STATE REPORTS** option. The "State Reports" window appears displaying the reports for your state.
2. Additional instructions can be located under your state's name and the report's title.

ARIZONA

The following report categories are available for the state of Arizona:

- Patient Specific
- Other

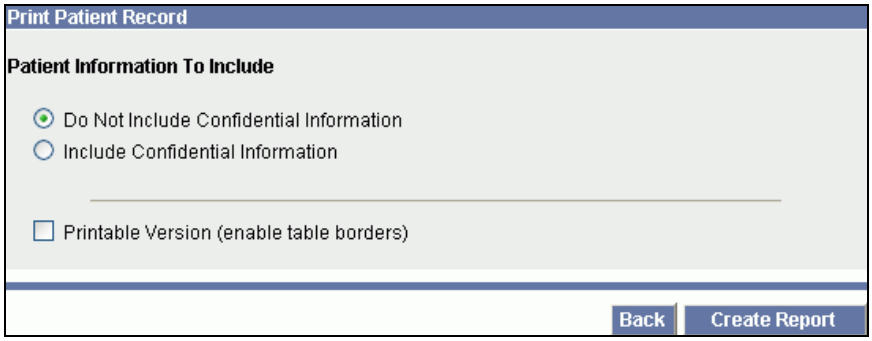
PATIENT RECORD

This report combines the Patient Record Summary and Forecast Reports. Confidential information is optional based on the user's selection. The summary of the report will show Td split out from the rest of the DTaP/DTP/DT family. It will also show PPD. It continues to show chickenpox history. The Forecast table will print below the summary table versus listing the next shot due.

This report will be used by school nurses and other medical staff.

1. From the **PATIENT SPECIFIC** category, click the report title. The report's "Limitations/Selections" window appears.

Figure 19-1: AZ Patient Record Limitations/Selections



2. Click on one of the radio buttons to select what you want to include or exclude **CONFIDENTIAL INFORMATION**.

3. Click the **PRINTABLE VERSION (ENABLE TABLE BORDERS**) if you want to include table borders around the report.

4. Click one of the available buttons:

   - **BACK** – to not submit the report and return to the "Reports Menu" list.
   - **CREATE REPORT** – to display the report in a new browser window providing the option to print. The report shown below is WITHOUT "table borders." Another illustration is included to show what the report looks like with "table borders."

Figure 19-2: AZ Patient Record Report w/o Table Borders

Arizona Department of Health Services

Patient Vaccination Record

IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Facility: GOOTEE THOMAS H
Date: July 22, 2004

Patient ID: 83123
Name: BOB R ARTHUR
Birth Date: 02/26/1952
Gender: MALE
Guardian:
Physician:

Phone: (812)936-2537
Street:
City: FRENCH LICK
State: IN
ZIP: 47432

Medicaid No:

WIC ID:

Vaccine Family	Dose 1	Dose 2	Dose 3	Dose 4
Influenza	10/05/2000			
Td				

Vaccine Family	Dose	Scheduled Date	Minimum Valid Date
VARICELLA	1	02/26/1953	02/26/1953
FLU	2	10/01/2001	11/02/2000

Figure 19-3: AZ Patient Record with Table Borders

Arizona Department of Health Services

Patient Vaccination Record

IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Facility: GOOTEE THOMAS H
Date: July 22, 2004

Patient ID: 83123
Name: BOB R ARTHUR
Birth Date: 02/26/1952
Gender: MALE
Guardian:
Physician:

Phone: (812)936-2537
Street:
City: FRENCH LICK
State: IN
ZIP: 47432

Medicaid No:

WIC ID:

Vaccine Family	Dose 1	Dose 2	Dose 3	Dose 4
Influenza	10/05/2000			
Td				

Vaccine Family	Dose	Scheduled Date	Minimum Valid Date
VARICELLA	1	02/26/1953	02/26/1953
FLU	2	10/01/2001	11/02/2000

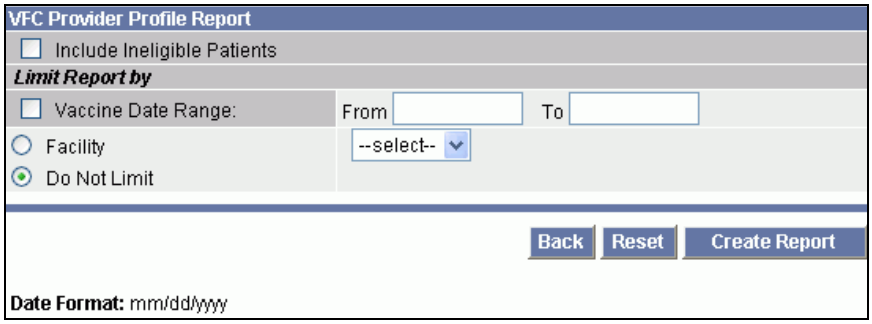
VFC PROVIDER PROFILE

This report lists the number of patients in each age group that are VFC eligible. In addition, there is a table at the bottom of the VFC Accountability Log, displaying the number of visits that occurred over the report's time period. A visit is defined as the unique combination of patient, vaccination date, and VFC eligibility (i.e., a visit equals one row in the top report table).

The VFC Accountability Report will be a single Eligibility column that will spell out the shot's VFC eligibility versus "tick" marks. In addition, there will be only one vaccination table instead of two. The vaccination column headings will be printed above the totals (at the bottom of the vaccination table) as well as at the top, making it easier to read multi-page reports.

1. Point and click on the **report title**. The report's limitations/selections window appears.

Figure 19-4: AZ – VFC Provider Profile Limitations/Selections



2. Optionally click the **INCLUDE INELIGIBLE PATIENTS** if you want to include them in the report.
3. Type the **VACCINE DATE RANGE** by typing a date in the **FROM** and **TO** fields using the format mmddyyyy. The checkbox will automatically get selected.
4. Depending on your access level, click the drop-down menu arrow(s) and select an **IRMS** and/or **FACILITY,** or **FACILITY GROUP**. The checkbox will automatically get selected.
5. Click on either of the available buttons:
   - **RESET** – to erase selections just made and remain on the same window.

- **BACK** – to not submit the report and return to the "Reports Menu" list.
- **CREATE REPORT** – to display the report in a new browser window.

Figure 19-5: AZ - VFC Provider Profile Report

Vaccines For Children (VFC) Program
VFC Provider Profile Report for Public Provider/Hospital (Private and Public) Use
Date Range: 01/01/2000 To 11/23/2004

Includes Patients with VFC Eligible Vaccinations Only

VFC Eligibility Summary

	< 1 year old	1 - 6 years	7 - 18 years	Total
Enrolled in KidsCare	0	0	0	0
Enrolled in AHCCCS (Medicaid)	0	0	0	0
No Health Insurance (Uninsured)	0	0	0	0
Native American/Alaskan Native	0	0	0	0
*Underinsured (see definition below)	0	0	0	0
Total	0	0	0	0

* This category is restricted to children with health insurance that does not cover immunizations.

INDIANA

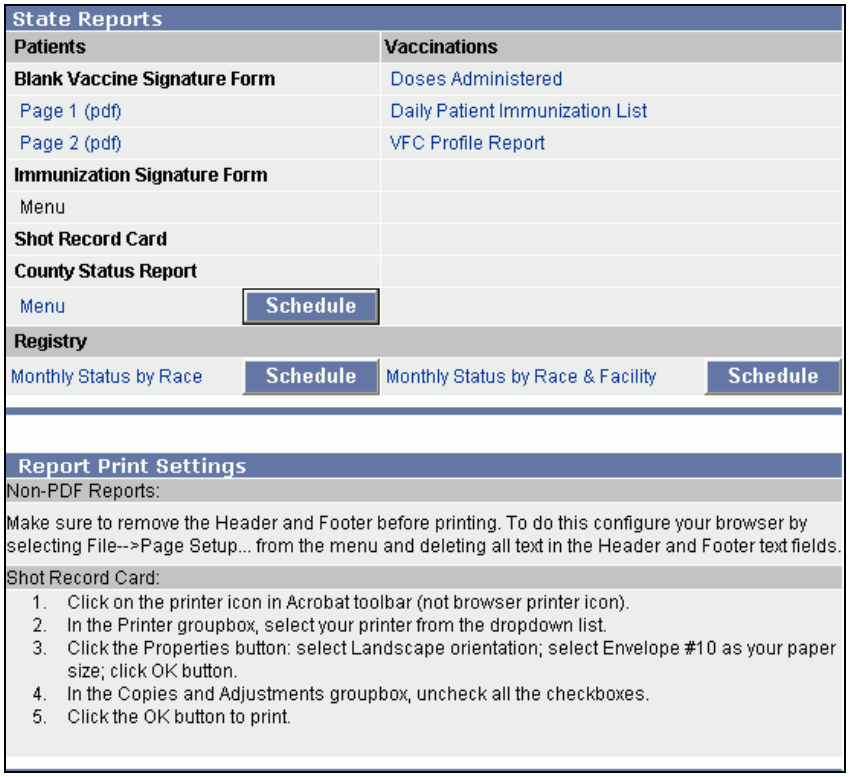
The following report categories are available for the state of Indiana:

- Blank Vaccine Signature Form
- Immunization Signature Form
- Shot Record Card
- Vaccinations
- County Status Report (can be run or scheduled)
- Registry (can be run or scheduled)

Each category and its report(s) will be illustrated.

The "State Reports" window appears.

Figure 19-6: IN – State Reports Menu List

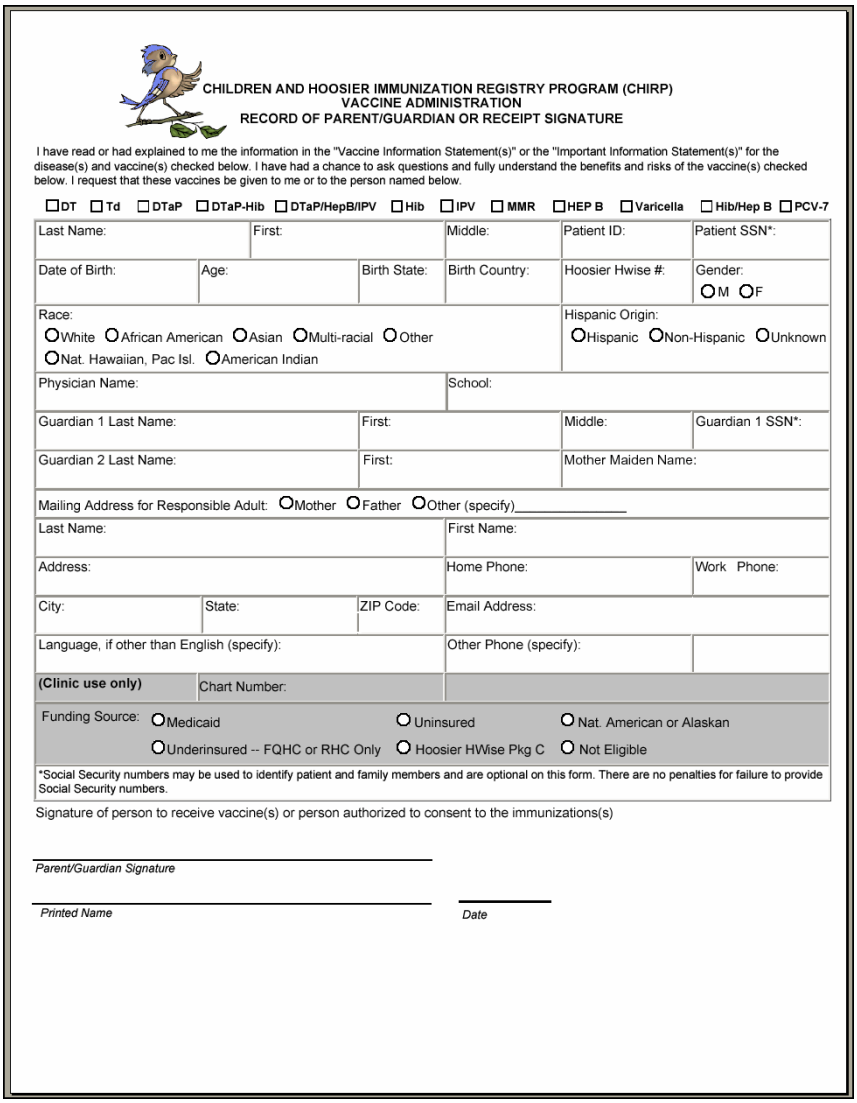


Note: For the reports that can be run or scheduled, there is a section titled "Using the Scheduler" for instructions to setup the report to run later.

PAGE 1 (PDF)

1. From the **BLANK VACCINE SIGNATURE FORM CATEGORY**, point and click on the **PAGE 1 (PDF) REPORT**. The "Page 1" report appears in a new browser window.

Figure 19-7: IN – Page 1 (PDF) Report



CHILDREN AND HOOSIER IMMUNIZATION REGISTRY PROGRAM (CHIRP)
VACCINE ADMINISTRATION
RECORD OF PARENT/GUARDIAN OR RECEIPT SIGNATURE

I have read or had explained to me the information in the "Vaccine Information Statement(s)" or the "Important Information Statement(s)" for the disease(s) and vaccine(s) checked below. I have had a chance to ask questions and fully understand the benefits and risks of the vaccine(s) checked below. I request that these vaccines be given to me or to the person named below.

☐ DT ☐ Td ☐ DTaP ☐ DTaP-Hib ☐ DTaP/HepB/IPV ☐ Hib ☐ IPV ☐ MMR ☐ HEP B ☐ Varicella ☐ Hib/Hep B ☐ PCV-7

Last Name:	First:		Middle:	Patient ID:	Patient SSN*:
Date of Birth:	Age:	Birth State:	Birth Country:	Hoosier Hwise #:	Gender: O M O F
Race: O White O African American O Asian O Multi-racial O Other O Nat. Hawaiian, Pac Isl. O American Indian				Hispanic Origin: O Hispanic O Non-Hispanic O Unknown	
Physician Name:			School:		
Guardian 1 Last Name:	First:		Middle:	Guardian 1 SSN*:	
Guardian 2 Last Name:	First:		Mother Maiden Name:		
Mailing Address for Responsible Adult: O Mother O Father O Other (specify)_____					
Last Name:			First Name:		
Address:			Home Phone:	Work Phone:	
City:	State:	ZIP Code:	Email Address:		
Language, if other than English (specify):			Other Phone (specify):		
(Clinic use only)	Chart Number:				
Funding Source: O Medicaid O Uninsured O Nat. American or Alaskan O Underinsured -- FQHC or RHC Only O Hoosier HWise Pkg C O Not Eligible					

*Social Security numbers may be used to identify patient and family members and are optional on this form. There are no penalties for failure to provide Social Security numbers.

Signature of person to receive vaccine(s) or person authorized to consent to the immunizations(s)

Parent/Guardian Signature

Printed Name *Date*

2. Choose the **Printer Icon** to submit the report to the printer or close the browser window to return to the "Reports" window.

PAGE 2 (PDF)

1. From the **BLANK VACCINE SIGNATURE FORM CATEGORY**, point and click on the **PAGE 2 (PDF) REPORT**. The "Page 2" report appears in a new browser window.

Figure 19-8: IN – Page 2 (PDF) Report

VACCINE ADMINISTRATION
PATIENT RECORD

Last Name:	First:	Middle:	Patient ID:
Date of Birth:	Age:	Contraindication:	

Do Not Go Below This Line -- For Clinic Use Only	
Clinic:	Date Vaccinated: Date Information Statement Provided to Parent/Guardian/Patient:

Vaccine & Dose # Given Today	Vaccine & Dose # Given Today	Vaccine & Dose # Given Today
☐ DT Td DTaP O 1 O 2 O 3 O 4 O 5	☐ IPV O 1 O 2 O 3 O 4 O 5	☐ MMR O 1 O 2
Manufacturer and Lot #:	Manufacturer and Lot #:	Manufacturer and Lot #:
Route/Site:	Route/Site:	Route/Site:
Date of Information Statement:	Date of Information Statement:	Date of Information Statement:
Vaccine & Dose # Given Today	Vaccine & Dose # Given Today	Vaccine & Dose # Given Today
☐ HIB O 1 O 2 O 3 O 4	☐ Hep B O 1 O 2 O 3	☐ Varicella O 1 O 2
Manufacturer and Lot #:	Manufacturer and Lot #:	Manufacturer and Lot #:
Route/Site:	Route/Site:	Route/Site:
Date of Information Statement:	Date of Information Statement:	Date of Information Statement:
Vaccine & Dose # Given Today	Vaccine & Dose # Given Today	Vaccine & Dose # Given Today
☐ Pneumococcal-7 O 1 O 2 O 3 O 4	☐ Other O 1 O 2 O 3 O 4	☐ Other O 1 O 2 O 3 O 4
Manufacturer and Lot #:	Manufacturer and Lot #:	Manufacturer and Lot #:
Route/Site:	Route/Site:	Route/Site:
Date of Information Statement:	Date of Information Statement:	Date of Information Statement:

X

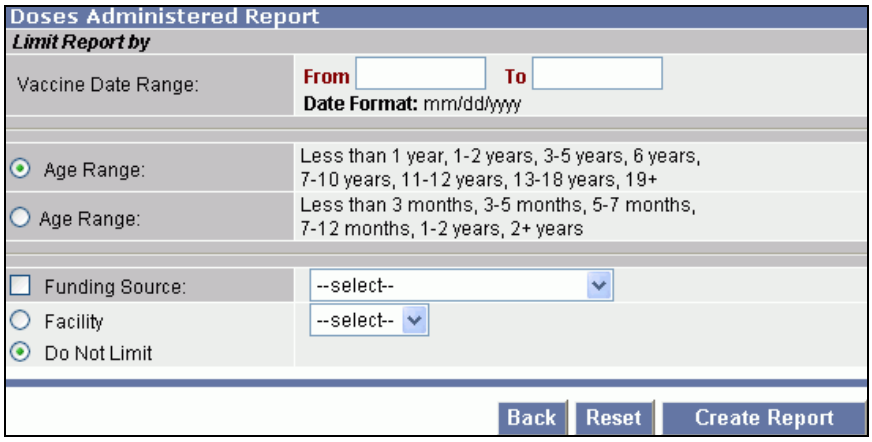
Signature and Title of Vaccine Administrator

2. Choose the **Printer Icon** to submit the report to the printer or close the browser window to return to the "Reports" window.

DOSES ADMINISTERED REPORT

1. From the **VACCINATIONS CATEGORY**, point and click on the **DOSES ADMINISTERED REPORT**. The "Doses Administered" report's limitation/selection window appears.

Figure 19-9: IN – Doses Administered Limitations/Selections



2. Type the **FROM** and **TO** dates if you want to limit the report by Vaccine Date Range.

3. Click on either of the **AGE RANGE** radio buttons if you want to limit the report by AGE RANGE.

   - The first **AGE RANGE** = Less than 1 year, 1-2 years, 3-5 years, 6 years, 7-10 years, 11-12 years, 13-18 years, 19+ (This choice is the default)
   - The second **AGE RANGE** = Less than 3 months, 3-5 months, 5-7 months, 7-12 months, 1-2 years, 2+ years

   Note: Only one radio button can be chosen at one time.

4. If desired, click the drop-down arrow to select to limit by **FUNDING SOURCE**. The checkbox will automatically get selected.

5. If desired, point and click the drop-down arrow to select a **FACILITY** or **FACILITY GROUP**. The radio button will automatically get selected, or point and click on the **DO NOT LIMIT** radio button.

6. Point and click on one of the available buttons:

   - **RESET** – to erase newly selected criteria and remain on the window to re-enter criteria.
   - **BACK** – to not submit the report and return to the "Reports Menu" list.

- **CREATE REPORT** – to display the report in a new browser window.

7. Choose the **Printer Icon** to submit the report to the printer or close the browser window to return to the "Reports" window.

Figure 19-10: IN – Doses Administered Report

Doses Administered

Page 1 of 1 **Report Date:** March 22, 2004

Report Criteria
IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Date Range: 01/01/2001 To 01/01/2004
For Patients Seen at: All Clinics
For Patients With Funding Code: All Funding Sources **Pin #**

Description	Less Than 1 Year	1 Year	2 Years	3-5 Years	6 Years	7-10 Years	11-12 Years	13-18 Years	19 Years & over	Totals
DTaP	43	0	0	0	0	0	0	0	0	43
Totals	43	0	0	0	0	0	0	0	0	43
Total Patient(s): 15										

DAILY PATIENT IMMUNIZATION LIST

1. From the **VACCINATIONS CATEGORY**, point and click on the **DAILY PATIENT IMMUNIZATION LIST**. The "Daily Patient Immunization List" report's limitation/selection window appears.

Figure 19-11: IN – Daily Patient Immunization List Limitations/Selections

Daily Patient Immunization List
Limit Report By
Shots Given on this Date:
Facility --select--
Do Not Limit
Back Reset Create Report

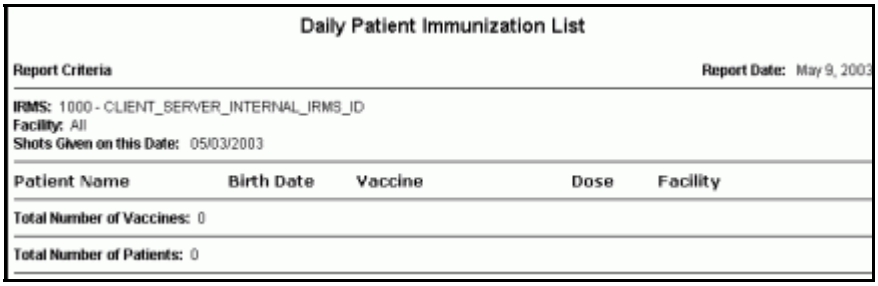
2. You **MUST** enter a **DATE** in the red field, "**SHOTS GIVEN ON THIS DATE**." Type the date using the format, MM/DD/YYYY.

3. If desired, point and click the drop-down arrow to select a **FACILITY** or **FACILITY GROUP**. The radio button will automatically get selected, or point and click on the **DO NOT LIMIT** radio button.

4. Point and click on one of the available buttons:

- **RESET** – to erase newly selected criteria, and remain on the window to re-enter new criteria.
- **BACK** – to not submit the report and return to the "Reports Menu" list.
- **CREATE REPORT** – to display the report in a new browser window.

Figure 19-12: IN – Daily Patient Immunization List Report


Daily Patient Immunization List

Report Criteria — Report Date: May 9, 2003

IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Facility: All
Shots Given on this Date: 05/03/2003

Patient Name	Birth Date	Vaccine	Dose	Facility

Total Number of Vaccines: 0

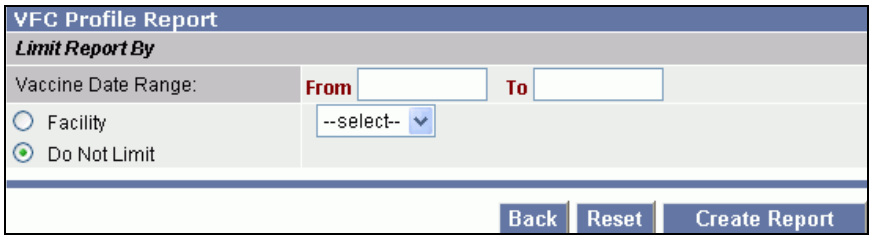
Total Number of Patients: 0

5. Choose the **Printer Icon** to submit the report to the printer or close the browser window to return to the "Reports" window.

VFC Profile Report

1. From the **VACCINATIONS CATEGORY**, point and click on the **VFC PROFILE REPORT**. The "Doses Administered" report's limitation/selection window appears.

Figure 19-13: IN – VFC Profile Limitations/Selections



2. You **MUST** enter a **FROM** and **TO** date in the red fields, for the **VACCINE DATE RANGE**. Type the dates using the format, MM/DD/YYYY.
3. If desired, point and click the drop-down arrow to select a **FACILITY** or **FACILITY GROUP**. The radio button will automatically get selected, or point and click on the **DO NOT LIMIT** radio button.
4. Point and click on one of the available buttons:

- **RESET** – to erase newly selected/entered criteria and remain on the window to re-enter criteria.
- **BACK** – to not submit the report and return to the "Reports Menu" list.
- **CREATE REPORT** – to display the report in a new browser window.

Figure 19-14: IN – VFC Profile Report

VFC Profile Report

Report Criteria **Report Date:** March 22, 2004

IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Date Range: 01/01/2001 **to** 06/03/2003
For Patients Seen at: All Clinics

Description	Less Than 1 Year	1-6 Years	7-18 Years	Totals
Medicaid	0	0	0	0
Uninsured	0	0	0	0
Nat. Amer. or Alaskan	0	0	0	0
Underinsured	0	0	0	0
Local Purchase only	0	0	0	0
Hoosier HWise Pkg C	0	0	0	0
317 or Insurance does not pay	0	0	0	0
Totals	0	0	0	0
Totals excluding 317 or Insurance does not pay	0	0	0	0

5. Choose the **Printer Icon** to submit the report to the printer or close the browser window to return to the "Reports"

IMMUNIZATION SIGNATURE FORM – MENU

1. Perform a search on a **PATIENT**.
2. From the **REPORTS MENU**, choose **STATE REPORTS**.
3. From the **IMMUNIZATION SIGNATURE FORM CATEGORY**, select **MENU**. The "Vaccine Immunization Patient Record" window appears.

Figure 19-15: IN – Vaccine Immunization Patient Record Limitations/Selections

VACCINE ADMINISTRATION PATIENT RECORD

Complete for Report Date: 08/30/2005

Page 1

Vaccinations Requested:

- DT
- Td
- DTaP
- DTaP/Hib
- DTaP/HepB/IPV
- Hib
- IPV
- MMR
- Hep-B
- Varicella
- Hib/HepB
- Pneumococcal7

Responsible Adult: Mother Father Other... (specify:)

Other Phone Number: (description:)

Page 2

Create Form Cancel

To Capture Guardian's Signature:

1. Select "Page 1" and enter any necessary information.
2. Click the "Create Form" button.
3. Print out the form.
4. Click here to open the signature capture window.
5. Click the "Begin Signing" button on the signature capture window.
6. Have guardian sign printout on top of the SignatureGem Electronic Signature Pad.
7. Click the "Save Signed Form" button on the signature capture window.

Note: Click here to setup electronic signature software before using the SignatureGem Electronic Signature Pad for the first time. Choose the following options to set up the software:

1. Accept the User Agreement.
2. Choose the appropriate operating system.
3. When asked if you will be viewing signatures in Microsoft Word, choose *No*.
4. When asked if you will be viewing signatures in Adobe Acrobat, choose *No*.
5. Choose *I have a tablet, and want to sign eDocuments*.
6. When asked to select your tablet, choose *SignatureGem 1X5*.
7. When asked to select your connection type, choose *USB*.

Saved Forms:

Note: Observe the instructions noted in the window section titled, "To Capture Guardian's Signature."

4. Select the type of **Vaccination(s) Requested** by pointing and clicking the checkbox(es).

5. Point and click the radio button for the **RESPONSIBLE ADULT** (the person who will be signing the form).

6. Type the **WORK PHONE NUMBER** and/or **OTHER PHONE NUMBER**. If **OTHER PHONE NUMBER** is used, type the **DESCRIPTION**.

7. Type the **PARENT/GUARDIAN RELATIONSHIP TO PATIENT.**

8. Point and click on one of the available buttons:

   - **CANCEL** – to NOT submit the report and return to the “Reports Menu” list.
   - **CREATE FORM** – to display the report in a new browser window. The "Vaccine Administration / Signature Form" will display in a separate browser window.

Figure 19-16: IN – Vaccine Administration Record

VACCINE ADMINISTRATION
RECORD OF PARENT/GUARDIAN OR RECEIPT SIGNATURE

I have read or had explained to me the information in the "Vaccine Information Statement(s)" or the "Important Information Statement(s)" for the disease(s) and vaccine(s) checked below. I have had a chance to ask questions and fully understand the benefits and risks of the vaccine(s) checked below. I request that those vaccines be given to me or to the person named below.

☐ DT ☐ Td ☐ DTaP ☐ DTaP-Hib ☐ Hib ☐ IPV ☐ MMR ☐ HEP B ☐ Varicella ☐ Hib/Hep B ☐ Pneumococcal-7

Last Name: DOE	First: JOHN		Middle: DONOVAN	Patient ID: 1415916	Patient SSN#:
Date of Birth: 06/03/2000	Age: 153 weeks; 35 months; 2 yrs	Birth State: LA	Birth Country: U.S.	Hoosier Hwise #:	Gender: ○M ○F
Race: ○White ○African American ○Asian ○Multi-radial ○Other ○Nat. Hawaiian, Pac Isl. ○American Indian				Hispanic Origin: ○Hispanic ○Non-Hispanic ○Unknown	
Physician Name: WHYTE, MD, MARTHA				Mother Maiden Name:	
Guardian 1 Last Name:		First: SANDY		Middle:	Guardian 1 SSN#:
Guardian 2 Last Name:		First:			
Mailing Address for Responsible Adult: ◉Mother ○Father ○Other (specify)_____					
Last Name:			First Name: SANDY		
Address: 100 LOOP STREET				Home Phone:	
City: SHREVEPORT	State: LOUISIANA	ZIP Code: 71101		Work Phone:	

9. Send the form to the printer by point and clicking on the **PRINTER ICON**.

10. Remove the form from the printer and place it on the **Electronic Signature Pad**.

11. Press the "**SIGN PAGE**" hyperlink located in the instructions noted in the window section titled, "To Capture Guardian's Signature" to get a physical signature.

Note: Initially, you will see the Java Plug-In logo and then the blank form appears. This form remains blank until the Parent/Guardian begins to sign their name. Their signature

will appear on the window as they are signing.

Figure 19-17: IN – Sign Form: Vaccine Administration Record

12. Have the guardian **sign** in the "signature" area on the form using the ClipGem Electronic Clipboard Pen.

13. Point and click on the **SAVE SIGNED FORM** button to save the form. You will return to the "Vaccine Administration Patient Record" with your recently signed form at the bottom of the window in the Saved Forms section.

SHOT RECORD CARD

The facility phone number will print on the shot card. The Varicella message was changed to "Varicella History: Parent report of disease" regardless of patient ownership.

1. Perform a **SEARCH** on a **PATIENT**.
2. From the **REPORTS MENU**, point and click on **STATE REPORTS**.
3. From the **SHOT RECORD CARD CATEGORY**, choose the **9" x 4.5" CARD**. The shot card will display in a new browser window.

Figure 19-18: IN – Official Immunization Record

Official Immunization Record
as of November 22, 2004

JOHN M ANDERSON — Patient Name
01/15/1998 — Birth Date
Parent's/Guardian's Name
Patient's ID
* 4 8 9 1 6 *

	1	2	3	4	5
DTaP	10/6/00				
IPV	10/6/00				
PCV7	4/24/00				
Varicella	4/24/00				
Influ Whl	(10/27/00)	(12/4/00)			
HepB-ped	10/6/00				

4. Choose the **Printer Icon** to submit the report to the printer or close the browser window to return to the "Reports" window.

COUNTY STATUS REPORT – MENU (RUN OR SCHEDULE)

This category only has one report at this time, referred to as **MENU**. This report can be run immediately (instructions below) or set up to run later using the scheduler. If you want to use the scheduler, refer to the section titled, "Using the Scheduler."

1. From the **COUNTY STATUS REPORT** section, click the **MENU** option. The "County Status Monthly Report" limitations/selections window appears.

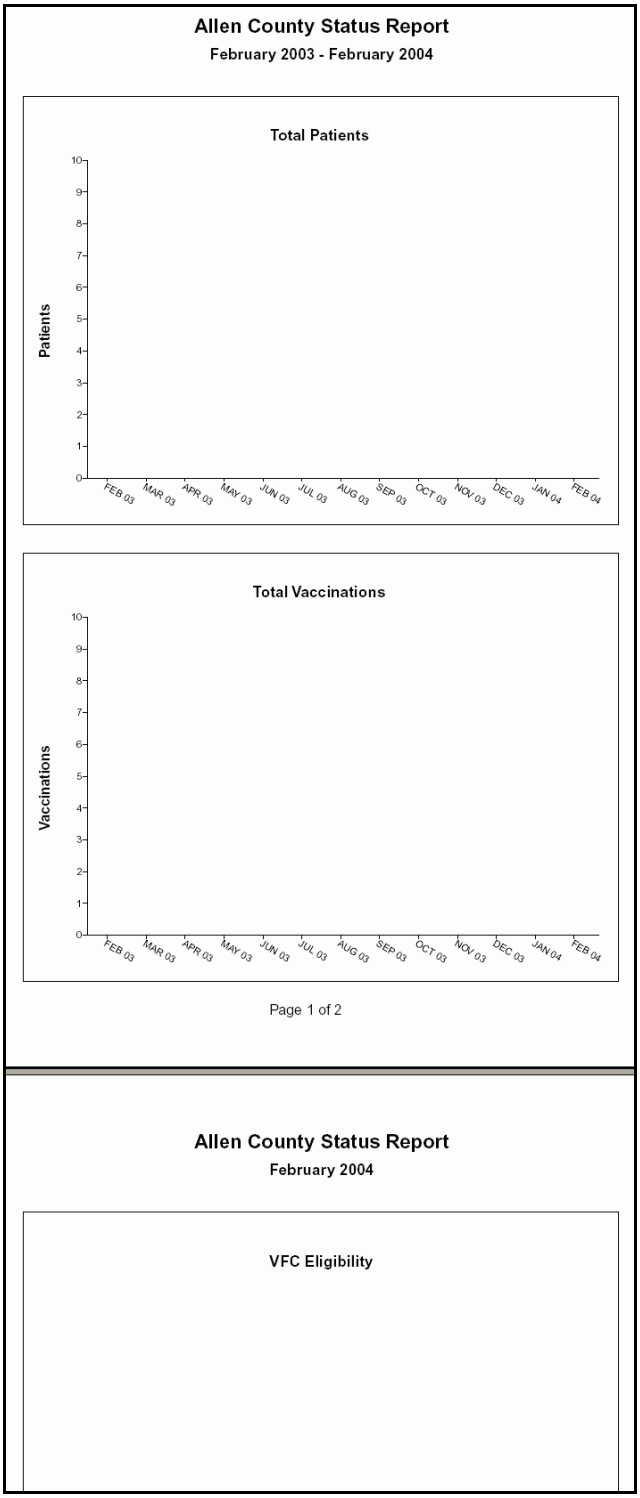
Figure 19-19: IN – County Status Monthly Report Limitations/Selections

2. Click the drop-down arrow to view/select a **COUNTY**.

3. Click one of the available buttons:

- **RESET** – to erase newly selected items.
- **BACK** – to not run the report and return to the "Reports Menu" list.
- **CREATE REPORT** – to run and display the report. This is a two-page report that lists total patients, total vaccinations, VFC Eligibility, and "run" date.

Figure 19-20: IN – County Status Monthly Report



4. Choose the **Printer Icon** to submit the report to the printer or close the browser window to return to the "Reports"

REGISTRY

Currently there are two reports available for the Registry Users.

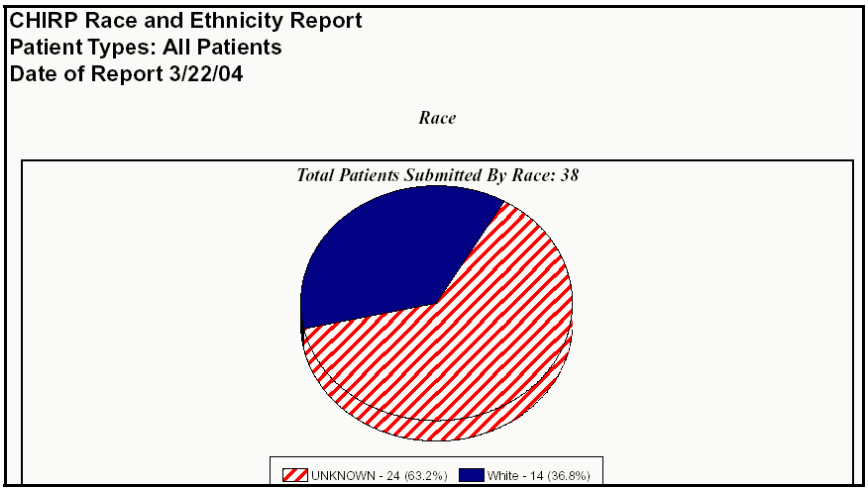
- Monthly Status by Race
- Monthly Status by Race and Facility

Due to the size of these reports, use the Scheduler.

MONTHLY STATUS BY RACE

1. From the **REGISTRY REPORT** section, click the **MONTHLY STATUS BY RACE** option. The **VARIOUS GRAPHS** will display in a new browser window.

Figure 19-21: IN – Monthly Status by Race Report

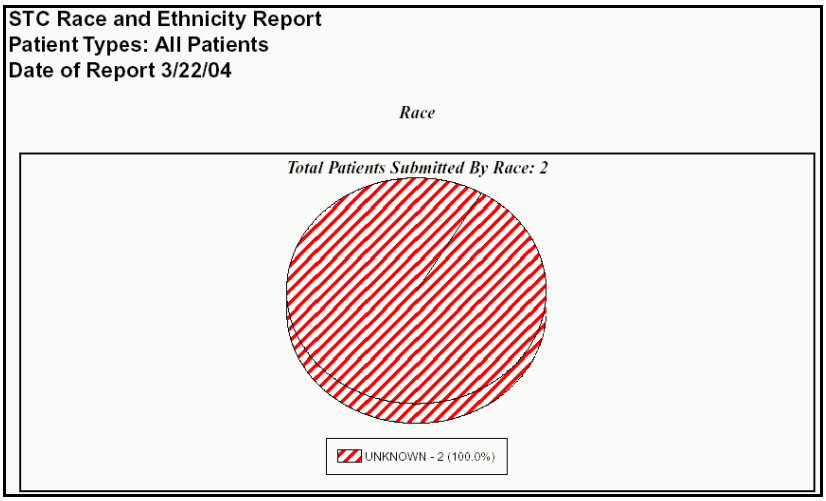


2. Choose the **Printer Icon** to submit the report to the printer or close the browser window to return to the "Reports" window.

MONTHLY STATUS BY RACE AND FACILITY

1. From the **REGISTRY REPORT** section, click the **MONTHLY STATUS BY RACE and FACILITY** option. The **VARIOUS GRAPHS** will appear.

Figure 19-22: Monthly Status by Race and Facility Report



2. Choose the **Printer Icon** to submit the report to the printer or close the browser window to return to the "Reports" window.

IDAHO

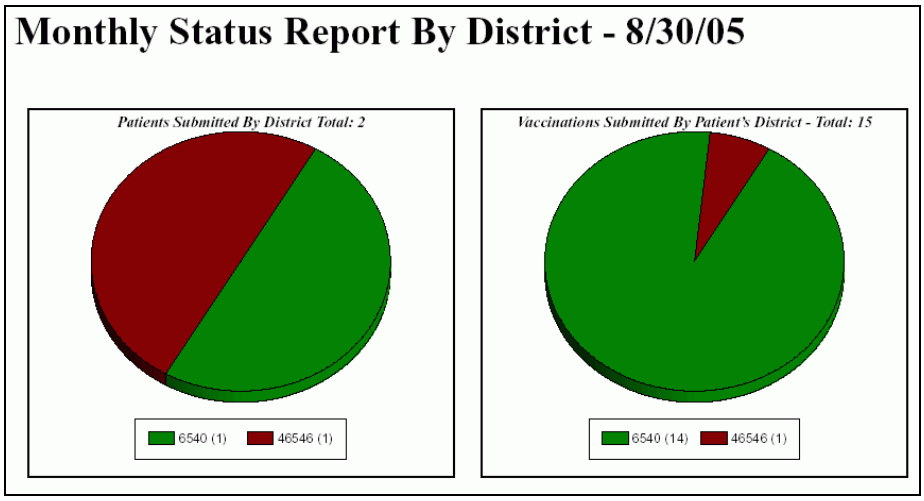
The report available for Idaho is for the Registry. The report can be set up to run immediately (instructions below) or later using the Scheduler. Refer to the section titled, "Using the Scheduler" for instructions on setting up the report.

REGISTRY – MONTHLY STATUS BY DISTRICT

This report reveals the number of patients submitted by district, their vaccinations, children age 19-35 Months, Children Receiving 4th DTaP by 24 Months, and Children completing 4:3:1:3:3: series by 24 Months in the format of pie charts.

1. Click on the **Report's Title** or the **Schedule** button. The report appears similar to the one shown.

Figure 19-23: ID – Registry – Monthly Status by District Report



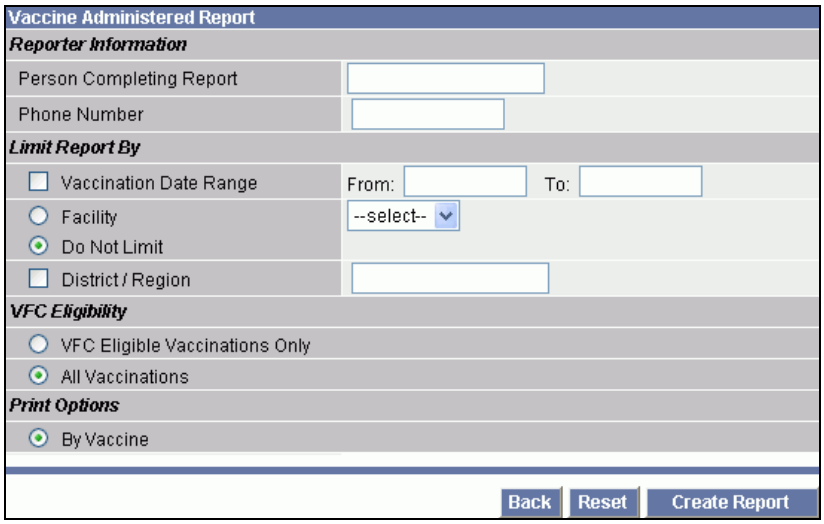
2. Click on the **Printer Icon** to print the report or **close** the window by clicking on the X in the upper right hand corner.

VACCINE ADMINISTERED

This report reveals the vaccines administered by IRMS, Facility/Facility Group, and VFC Eligibility. After running the report, you can optionally email it to a user that is specified in the System Administration Properties file and database setting.

1. Click the Report's Title. The report's limitation/selection window appears.

Figure 19-24: ID – Vaccine Administered Limitations/Selections



2. Type the **REPORTER INFORMATION** by typing the following:
   - Person Completing the Report
   - Phone Number
3. In the **LIMIT REPORT BY** section, type the **FROM** and **TO** dates if you want to limit the report by "**Vaccination Date Range**." The checkbox will automatically be selected after entering the dates.
4. Point and click the drop-down arrow to select an IRMS. The checkbox will automatically be selected after selecting the IRMS.
5. Point and click the drop-down arrow to select to limit by the **Facility/Facility Group**. The radio button will automatically get selected, or point and click the radio button to **NOT LIMIT BY FACILITY**.
6. Point and click on the radio button to select the VFC Eligibility." Select either **VFC ELIGIBLE VACCINATIONS ONLY** or **ALL VACCINATIONS**.
7. In the **PRINT OPTIONS** section, point and click **BY VACCINE** to order the report in vaccine order.
8. Click one of the available buttons:
   - **RESET** – to erase newly entered/selected items and re-enter new criteria.
   - **BACK** – to not submit the report and return to the "Reports Menu" list.
   - **CREATE REPORT** – to display the report output in a new window (sample shown below).

Figure 19-25: ID - Vaccine Administered Report

Vaccine Administered Report
Includes ALL Vaccination Dates

IRMS: All
Facility: All
Provider Number:
Date Submitted: May 3, 2005
Person completing report: SKB
Phone number: (602)241-1502

( ) Health Department
( ) Non-Health Department

Vaccine	Dose #	< 1	1	2	3-4	5	6-9	10-14	15-19	20-65+	Total	Vaccine on Hand
DTaP												
	1	1	0	0	0	0	0	0	0	0	1	
	2	1	0	0	0	0	0	0	0	0	1	
	3	1	0	0	0	0	0	0	0	0	1	
	4	0	1	0	0	0	0	0	0	0	1	
	Total	3	1	0	0	0	0	0	0	0	4	

Print Report Email Report

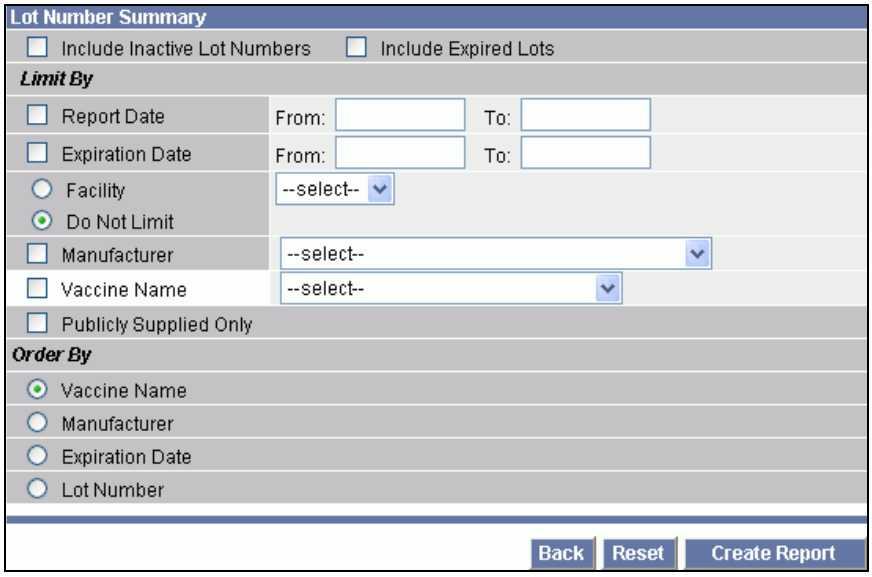
9. Either click the **PRINT REPORT** button to send the output to the printer, or click the **EMAIL REPORT** button to send the report via email to the person set in the System Administration Properties file (and database setting).

LOT NUMBER SUMMARY

This report displays a summary of Vaccine Name, Lot Number, Manufacturer, Expiration Date, VFC Eligibility, Number of Doses Available, Doses Used, Dosed Wasted, and Total Doses. After running the report, you can optionally email it to a user that is specified in the System Administration Properties file and database setting.

1. Click the Report's Title. The report's limitation/selection window appears.

Figure 19-26: ID – Lot Number Summary Limitations/Selections



2. If you want to **INCLUDE INACTIVE LOT NUMBERS** or **EXPIRED LOTS**, click the respective checkbox.

3. In the **LIMIT REPORT BY** section, type the **FROM** and **TO** dates if you want to limit the report by "

   - Report Date, or
   - Expiration Date

4. Optionally, point and click the drop-down arrow to select an IRMS. The checkbox will automatically get selected after selecting the IRMS.

5. Optionally, point and click the drop-down arrow to select to limit by the **Facility/Facility Group**. The radio button will automatically get selected, or point and click the radio button to **NOT LIMIT BY FACILITY**.

6. Optionally, point and click the **MANUFACTURER** drop-down menu arrow to view/select a valid manufacturer.

7. Optionally, point and click the **VACCINE NAME** drop-down menu arrow to view/select a valid Vaccine.

8. Optionally, point and click the **PUBLICLY SUPPLIED** checkbox.

9. To control the output's data grouping, click on one of the following radio buttons:

- Vaccine Name
- Manufacturer
- Expiration Date
- Lot Number

10. Click one of the available buttons:

- **RESET** – to erase newly entered/selected items and re-enter new criteria.
- **BACK** – to not submit the report and return to the "Reports Menu" list.
- **CREATE REPORT** – to display the report output in a new window (sample shown below).

Figure 19-27: ID – Lot Number Summary Report

Lot Number Summary

Report Criteria: **Report Date:** May 3, 2005

IRMS:	All		
Facility:	All		
Vaccine Name:	All	Include Inactive Lots:	Yes
Manufacturer:	All	Include Expired Lots:	No
Expiration Date Range:	All	Publicly Supplied Only:	No
Report Date Range:	All	Sort Order:	Vaccine Name

Lot Number	Vaccine Name	Manufacturer	Expires	Publicly Supplied	Doses Available	Doses Used	Doses Wasted	Doses Total	Inactive
9514532	DTaP	ABBOT	01/01/2008	Y	96	4	0	100	

Print Report | Email Report

11. Either click the **PRINT REPORT** button to send the output to the printer, or click the **EMAIL REPORT** button to send the report via email to the person set in the System Administration Properties file (and database setting).

LOUISIANA

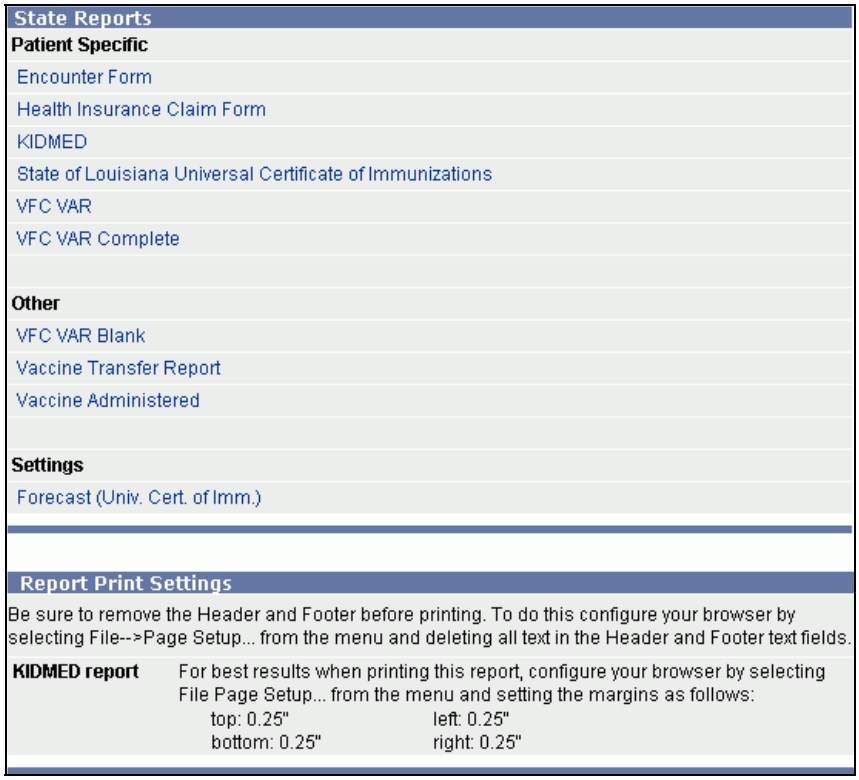
The following report categories are available for the state of Louisiana:

- Patient Specific
- Other
- Settings

Each category and its report(s) will be illustrated.

The "State Reports" window appears.

Figure 19-28: LA - State Reports Menu



ENCOUNTER FORM

1. Perform a **SEARCH** on a **PATIENT**.
2. From the **REPORTS MENU**, point and click on **STATE REPORTS**.
3. From the **PATIENT SPECIFIC CATEGORY**, choose the **ENCOUNTER FORM**. The form will display similar to the one shown below.

Figure 19-29: LA – Encounter Form

New Orleans Health Dept.
Child Health Center
Encounter Form

Clinic #:

DPW Number (To be Filled):

Date of Service: **March 22, 2004**

Name (Last, First, Middle): **SMITH, BOB,**

Date of Birth: **01/24/2001**

Mother Name:

Address: 146 MAIN ST

Zip: 85304

Phone#: (654)357-1587

Ethnic and Sex Group

- ☐ B-Black
- ☑ W-White
- ☐ H-Hispanic
- ☐ I-Indo-Chinese
- ☐ O-Other

☑ Male or ☐ Female

Type of Service

MD./ NC/ NS/ IO/ DPT/ MMR/ PPD G/R / HIB/

TD/ FLU/ BP/ PKU/ POSTPARTAL/ MCT/ T4/ 5-CELL

LEAD/ ADMIT/ WALK-IN/ SOCIAL SERVICES/ NUTR/

SP & MRG SCR./ WIC/ CSPP CERT.

4. Choose the **Printer Icon** to submit the report to the printer or click another menu option.

HEALTH INSURANCE CLAIM FORM

1. Perform a **SEARCH** on a **PATIENT**.
2. From the **REPORTS MENU**, point and click on **STATE REPORTS**.
3. From the **PATIENT SPECIFIC CATEGORY**, choose the **HEALTH INSURANCE CLAIM FORM**. The form will display similar to the one shown below.

Figure 19-30: LA – Health Insurance Claim Form

1. Medicare |Medicaid |Champus |Champva |Grp Health Plan |Blk Lung |Othr
☐ ☐ ☐ ☐ ☐ ☐ ☐

1a. INSURED'S I.D. NUMBER

2. Patients's Name (Last, First, Middle)
SMITH ,BOB

3. Date of Birth Sex
01/24/2001 MALE

4. INSURED'S NAME

5. PATIENT ADDRESS (No. Street)
146 MAIN ST

6. Patient Relationship to Insured
Self ☐ Spouse ☐
Child ☐ Other ☐

7. INSURED ADDRESS

City: GLENDALE
State: ARIZONA
Zip Code: 85304
Telephone: (654)357-1587

8. PATIENT STATUS
Single ☐ Married ☐
Emp ☐ FTS ☐ PTS ☐

City
State
Zip Code
Telephone ( )

9. Other Insured's Name (LAST, FIRST, MIDDLE)

a. Other Insured's Policy or Group Number

b. Other Insured's DOB
SEX
M ☐ F ☐

c. Employer's Name or School Name

d. Insurance Plan or Name or Program Name

10. Is Patient's condition related to:
a. Employment? (Current or Previous)
☐ YES ☐ NO
b. Auto Accident?
☐ YES ☐ NO
c. Other Accident?
☐ YES ☐ NO

10d. Reserved For Local Use

11. Insured's Policy Group Or Feca Number

a. Insured's Date of Birth
SEX
M ☐ F ☐

b. Employer's Name or School Name

c. Insurance Plan Name or Program Name

d. Is There Another Health Benefit Plan?
☐ YES ☐ NO
If yes, return to and complete 9 a-d.

12. PATIENT'S OR AUTHORIZED PERSON'S SIGNATURE. I authorize the release of any medical or other information necessary to process this claim. I also request payment of government benefits either to myself or to the party who accepts assignment.

SIGNED_____ DATE: 3/22/04

13. Insured's or Authorized Person's Signature. I authorize payment of medical benefits to the undersigned physician or supplier for services described below.

SIGNED_____

14. DATE OF CURRENT ILLNESS (First symptoms) or Injury(accident) or Pregnancy (LMP)

15. If patient has had same or similar illness give first date:

16. Dates Patient Unable to Work in Current Occupation
FROM: TO:

17. Name or Referring Physician or Other Source

17a. I.D.Number or Referring Physician:

18. HOSPITALIZATION DATES RELATED TO CURRENT SERVICES
FROM: TO:

19. RESERVED FOR LOCAL USE

20. OUTSIDE LAB? ☐ YES ☐ NO

21. DIAGNOSIS OR NATURE Of Illness or Injury. (Relate items 1,2,3 or 4 to item 24E by line)
1._____ 3._____
2._____ 4._____

22. Medicaid Resubmission
CODE | ORIGINAL REF. NO.

23. Prior Authorization Number

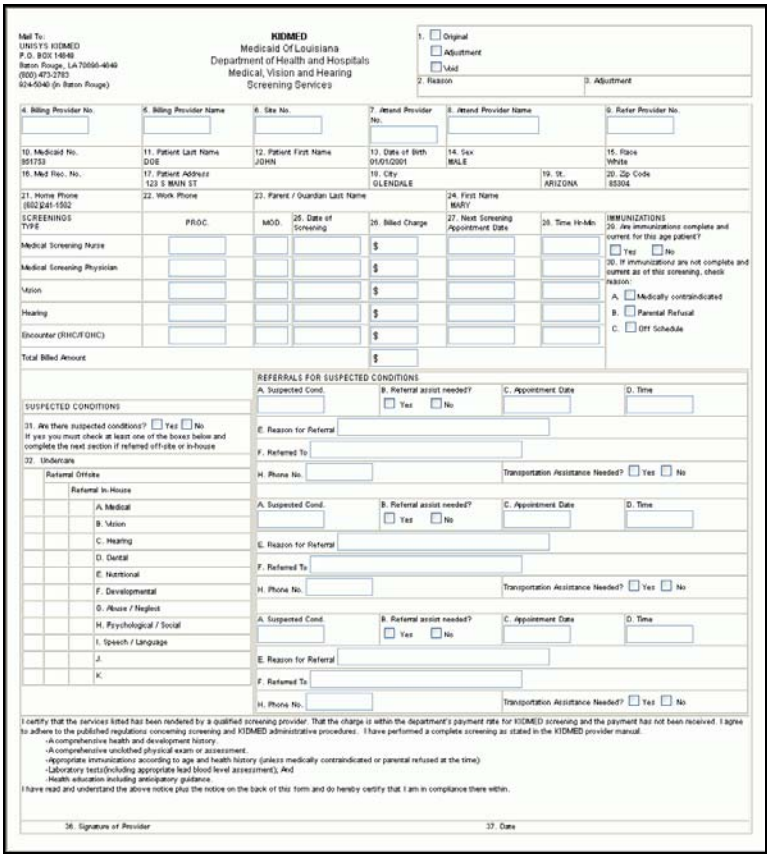
4. Choose the **Printer Icon** to submit the report to the printer or click another menu option.

KIDMED

The **KIDMED** report requires **ALL** the margins to be set at 0.25" via the **FILE | PAGE SETUP** option.

1. Perform a **SEARCH** on a **PATIENT**.
2. From the **REPORTS MENU**, point and click on **STATE REPORTS**.
3. From the **PATIENT SPECIFIC CATEGORY**, choose the **KIDMED FORM**. The form will display similar to the one shown below.

Figure 19-31: LA – KidMed Form



Mail To:
UNISYS KIDMED
P.O. BOX 14848
Baton Rouge, LA 70896-4848
(800) 473-2783
924-5040 (in Baton Rouge)

KIDMED
Medicaid Of Louisiana
Department of Health and Hospitals
Medical, Vision and Hearing
Screening Services

1. ☐ Original ☐ Adjustment ☐ Void
2. Reason
3. Adjustment

4. Billing Provider No.	5. Billing Provider Name	6. Site No.	7. Attend Provider No.	8. Attend Provider Name	9. Refer Provider No.

10. Medicaid No.	11. Patient Last Name	12. Patient First Name	13. Date of Birth	14. Sex	15. Race
351733	DOE	JOHN	01/01/2001	MALE	White

16. Med Rec. No.	17. Patient Address	18. City	19. St.	20. Zip Code
	123 S MAIN ST	GLENDALE	ARIZONA	85304

21. Home Phone	22. Work Phone	23. Parent / Guardian Last Name	24. First Name
(602)241-1552			MARY

SCREENINGS TYPE	PROC.	MOD.	25. Date of Screening	26. Billed Charge	27. Next Screening Appointment Date	28. Time In-Min
Medical Screening Nurse				$		
Medical Screening Physician				$		
Vision				$		
Hearing				$		
Encounter (RHC/FQHC)				$		
Total Billed Amount				$		

IMMUNIZATIONS
29. Are immunizations complete and current for this age patient? ☐ Yes ☐ No
30. If immunizations are not complete and current as of this screening, check reason:
A. ☐ Medically contraindicated
B. ☐ Parental Refusal
C. ☐ Off Schedule

SUSPECTED CONDITIONS
31. Are there suspected conditions? ☐ Yes ☐ No
If yes you must check at least one of the boxes below and complete the next section if referred off-site or in-house
32. Undercare
Referral Offsite
Referral In-House
A. Medical
B. Vision
C. Hearing
D. Dental
E. Nutritional
F. Developmental
G. Abuse / Neglect
H. Psychological / Social
I. Speech / Language
J.
K.

REFERRALS FOR SUSPECTED CONDITIONS

A. Suspected Cond.	B. Referral assist needed?	C. Appointment Date	D. Time
	☐ Yes ☐ No		

E. Reason for Referral
F. Referred To
H. Phone No.
Transportation Assistance Needed? ☐ Yes ☐ No

A. Suspected Cond.	B. Referral assist needed?	C. Appointment Date	D. Time
	☐ Yes ☐ No		

E. Reason for Referral
F. Referred To
H. Phone No.
Transportation Assistance Needed? ☐ Yes ☐ No

A. Suspected Cond.	B. Referral assist needed?	C. Appointment Date	D. Time
	☐ Yes ☐ No		

E. Reason for Referral
F. Referred To
H. Phone No.
Transportation Assistance Needed? ☐ Yes ☐ No

I certify that the services listed has been rendered by a qualified screening provider. That the charge is within the department's payment rate for KIDMED screening and the payment has not been received. I agree to adhere to the published regulations concerning screening and KIDMED administrative procedures. I have performed a complete screening as stated in the KIDMED provider manual.
-A comprehensive health and development history.
-A comprehensive unclothed physical exam or assessment.
-Appropriate immunizations according to age and health history (unless medically contraindicated or parental refused at the time)
-Laboratory tests(including appropriate lead blood level assessment); And
-Health education including anticipatory guidance.
I have read and understand the above notice plus the notice on the back of this form and do hereby certify that I am in compliance there within.

36. Signature of Provider
37. Date

4. Choose the **Printer Icon** to submit the report to the printer or click another menu option.

STATE OF LOUISIANA CERTIFICATE OF IMMUNIZATIONS

This certificate includes all vaccinations, doses, administration dates, patient/child's name, SIIS ID, parent or guardian, date of birth, etc.

1. Perform a **SEARCH** on a **PATIENT**.
2. From the **REPORTS MENU**, point and click on **STATE REPORTS**.
3. From the **PATIENT SPECIFIC CATEGORY**, choose the **CERTIFICATE OF IMMUNIZATIONS FORM**. The form will display in another browser window similar to the one shown below.

Figure 19-32: LA – Certificate of Immunizations Form

State of Louisiana Universal Certificate of Immunizations

Expiration Date: 02/01/2001 **Vaccine:** HEP-B 3 DOSE**
This record is invalid without a proper expiration date

Childs Name: JOHN DOE **Date of Birth:** 01/01/2001 **Parent or Guardian:** MARY
SIIS Patient ID: 1

Vaccine	MONTH,DAY AND YEAR EACH DOSE WAS GIVEN						
	Dose 1	Dose 2	Dose 3	Dose 4	Dose 5	Dose 6	Dose 7
DTaP/DTP/DT/Td	03/01/2001	05/01/2001	07/01/2001	01/01/2002			
OPV/IPV	03/01/2001	05/27/2005					
MMR	01/01/2002						
Hib	03/01/2001	05/01/2001	07/01/2001				
Hep B - 3 Dose	01/01/2001						
Varicella	01/01/2002						
Influenza	07/01/2001	08/01/2001	10/01/2001	10/01/2002	11/01/2002	10/01/2004	
Pneumo (PCV7)	03/01/2001	05/01/2001	07/01/2001				

* **School Entry Complete-Minimun**: 4-DTP, 3-Polio,(last DTP and Polio after 4th birthday), 2-MMR after 1st birthday and, 3-Hep B
** **Daycare Center**: Hib also required
*** Beginning Aug 2003, Varicella vaccine or history of the disease will be required for school and daycare entry.
Varicella History:

4. Choose the **Printer Icon** to submit the report to the printer or click another menu option.

VFC VAR

1. Perform a **SEARCH** on a **PATIENT**.
2. From the **REPORTS MENU**, point and click on **STATE REPORTS**.
3. From the **PATIENT SPECIFIC CATEGORY**, choose the **CERTIFICATE OF IMMUNIZATIONS FORM**. The form will display similar to the one shown below.

Figure 19-33: LA – VFC VAR Certificate of Immunizations Form

VACCINE ADMINISTRATION RECORD,
VACCINE FOR CHILDREN (VFC) PATIENT ELIGIBILITY SCREENING, AND REGISTRY AUTHORIZATION

Information About Person Receiving Vaccine:

Last Name: DOE	First: JOHN	Middle:	DOB: 01/01/2001	Age: 3
Name (Parent or Guardian, if applicable): MARY			Phone Number: (602)241-1502	
Address: 123 S MAIN ST	City: GLENDALE		State: AZ	Zip: 85304

I agree to allow information about all vaccinations given to me or to the person for whom I am authorized to consent to be released to other medical care providers, schools, child care, or head start centers to avoid the administration of unnecessary vaccinations and to determine immunization status. I understand that this will remain in effect until canceled by me in writing.

Signature of Parent/Guardian or adult vaccine receipient_____

FOR CLINIC USE ONLY

This child qualifies for vaccination through the VFC program because he/she (check only one box); or .....is not qualified ☐

(a) is enrolled in Medicaid ☑ (b) does not have health insurance ☐ (c) is American Indian or Alaskan Native ☐

I certify that the Important Information Statement(s) for the vaccines(s) indicated as administered below were presented to the person or parent /guardian named above at this clinic and on the date shown here.

Clinic:	Date Vaccinated:	Signature and title of the Vaccine Administrator
STC	6/15/04	

DTaP DT Td DTaP-Hib	IPV	MMR	HIB
Manufacturer and Lot#:	Manufacturer and Lot#:	Manufacturer and Lot#:	Manufacturer and Lot#:
Expiration Date: Site of Injection:	Expiration Date: Site of Injection:	Expiration Date: Site of Injection:	Expiration Date: Site of Injection:
VIS Pub Date:	VIS Pub Date:	VIS Pub Date:	VIS Pub Date:
Immunization & Dose # DT Td DTaP DTaP-Hib 1 2 3 4 5	Immunization & Dose IPV 1 2 3 4 5	Immunization & Dose MMR 1 2 3	Immunization & Dose HIB 1 2 3 4

HBV	HAV	VARICELLA	FLU
Manufacturer and Lot#:	Manufacturer and Lot#:	Manufacturer and Lot#:	Manufacturer and Lot#:
Expiration Date: Site of Injection:	Expiration Date: Site of Injection:	Expiration Date: Site of Injection:	Expiration Date: Site of Injection:
VIS Pub Date:	VIS Pub Date:	VIS Pub Date:	VIS Pub Date:
Immunization & Dose HBV 1 2 3 4	Immunization & Dose HAV 1 2 3	Immunization & Dose VARICELLA 1 2 3	Immunization & Dose FLU 1 2 3 4

PPV	PCV-7	OTHER	OTHER
Manufacturer and Lot#:	Manufacturer and Lot#:	Manufacturer and Lot#:	Manufacturer and Lot#:
Expiration Date: Site of Injection:	Expiration Date: Site of Injection:	Expiration Date: Site of Injection:	Expiration Date: Site of Injection:
VIS Pub Date:	VIS Pub Date:	VIS Pub Date:	VIS Pub Date:
Immunization & Dose PPV 1 2 3 4 5	Immunization & Dose PCV-7 1 2 3 4 5	Immunization & Dose 1 2 3 4	Immunization & Dose 1 2 3 4

4. Choose the **Printer Icon** to submit the report to the printer or click another menu option.

VFC VAR COMPLETE

1. Perform a **SEARCH** on a **PATIENT**.
2. From the **REPORTS MENU**, point and click on **STATE REPORTS**.

3. From the **PATIENT SPECIFIC CATEGORY**, choose the **VFC VAR COMPLETE FORM**. The report limitations window appears.

Figure 19-34: LA – VFC VAR Complete Form Limitations/Selections

4. If desired, enter a different date for the **COMPLETE FOR REPORT DATE** field. Use the format mmddyyyy.

5. Click the **CREATE FORM** button. The "filled in" form appears in a separate browser window.

Figure 19-35: LA – VFC VAR Complete Form

VACCINE ADMINISTRATION RECORD,
VACCINE FOR CHILDREN (VFC) PATIENT ELIGIBILITY SCREENING, AND REGISTRY AUTHORIZATION

Information About Person Receiving Vaccine:

Last Name: DOE	First: JOHN	Middle:	DOB: 01/01/2001	Age: 3
Name (Parent or Guardian, if applicable): MARY			Phone Number: (602)241-1502	
Address: 123 S MAIN ST	City: GLENDALE		State: ARIZONA	Zip: 85304

I agree to allow information about all vaccinations given to me or to the person for whom I am authorized to consent to be released to other medical care providers, schools, child care, or head start centers to avoid the administration of unnecessary vaccinations and to determine immunization status. I understand that this will remain in effect until canceled by me in writing.

Signature of Parent/Guardian or adult vaccine recipient _____

FOR CLINIC USE ONLY

This child qualifies for vaccination through the VFC program because he/she (check only one box); or .....is not qualified ☐

(a) is enrolled in Medicaid ☑ (b) does not have health insurance ☐ (c) is American Indian or Alaskan Native ☐

I certify that the Important Information Statement(s) for the vaccines(s) indicated as administered below were presented to the person or parent/guardian named above at this clinic and on the date shown here.

Clinic:	Date Vaccinated:	Signature and title of the Vaccine Administrator
	06/15/2004	

☐ DTaP DT Td DTaP-Hib	☐ IPV	☐ MMR	☐ HIB
Manufacturer and Lot#:	Manufacturer and Lot#:	Manufacturer and Lot#:	Manufacturer and Lot#:
Expiration Date: Site of Injection:	Expiration Date: Site of Injection:	Expiration Date: Site of Injection:	Expiration Date: Site of Injection:
VIS Pub Date:	VIS Pub Date:	VIS Pub Date:	VIS Pub Date:
Dose ☐1 ☐2 ☐3 ☐4 ☐5	Dose ☐1 ☐2 ☐3 ☐4 ☐5	Dose ☐1 ☐2 ☐3	Dose ☐1 ☐2 ☐3 ☐4

☐ HBV	☐ HAV	☐ VARICELLA	☐ FLU
Manufacturer and Lot#:	Manufacturer and Lot#:	Manufacturer and Lot#:	Manufacturer and Lot#:
Expiration Date: Site of Injection:	Expiration Date: Site of Injection:	Expiration Date: Site of Injection:	Expiration Date: Site of Injection:
VIS Pub Date:	VIS Pub Date:	VIS Pub Date:	VIS Pub Date:
Dose ☐1 ☐2 ☐3 ☐4	Dose ☐1 ☐2 ☐3	Dose ☐1 ☐2 ☐3	Dose ☐1 ☐2 ☐3 ☐4

☐ PPV	☐ PCV-7	☐ OTHER	☐ OTHER
Manufacturer and Lot#:	Manufacturer and Lot#:	Manufacturer and Lot#:	Manufacturer and Lot#:
Expiration Date: Site of Injection:	Expiration Date: Site of Injection:	Expiration Date: Site of Injection:	Expiration Date: Site of Injection:
VIS Pub Date:	VIS Pub Date:	VIS Pub Date:	VIS Pub Date:
Dose ☐1 ☐2 ☐3 ☐4 ☐5	Dose ☐1 ☐2 ☐3 ☐4 ☐5	Dose ☐1 ☐2 ☐3 ☐4	Dose ☐1 ☐2 ☐3 ☐4

6. Have the **GUARDIAN** sign the form using the SignatureGem Signature tool/pad.

7. Click the **SAVE SIGNATURE** button. The "Saved Form" will display at the bottom of the window in the Saved Forms section.

VFC VAR BLANK

1. From the **OTHER CATEGORY**, point and click on the **VFC VAR BLANK REPORT**. The blank "VFC VAR (Form)" immediately displays.

Figure 19-36: LA – VFC VAR Blank Form

VACCINE ADMINISTRATION RECORD,
VACCINE FOR CHILDREN (VFC) PATIENT ELIGIBILITY SCREENING, AND REGISTRY AUTHORIZATION

Information About Person Receiving Vaccine:

Last Name:	First:	Middle:	DOB:	Age:
Name (Parent or Guardian, if applicable):			Phone Number:	
Address:	City:		State:	Zip:

I agree to allow information about all vaccinations given to me or to the person for whom I am authorized to consent to be released to other medical care providers, schools, child care, or head start centers to avoid the administration of unnecessary vaccinations and to determine immunization status. I understand that this will remain in effect until canceled by me in writing.

Signature of Parent/Guardian or adult vaccine receipient_____

FOR CLINIC USE ONLY

This child qualifies for vaccination through the VFC program because he/she (check only one box); or .....is not qualified

(a) is enrolled in Medicaid	(b) does not have health insurance	(c) is American Indian or Alaskan Native

I certify that the Important Information Statement(s) for the vaccines(s) indicated as administered below were presented to the person or parent /guardian named above at this clinic and on the date shown here.

Clinic:	Date Vaccinated:	Signature and title of the Vaccine Administrator

DTaP DT Td DTaP-Hib	IPV	MMR	HIB
Manufacturer and Lot#:	Manufacturer and Lot#:	Manufacturer and Lot#:	Manufacturer and Lot#:
Expiration Date: Site of Injection:	Expiration Date: Site of Injection:	Expiration Date: Site of Injection:	Expiration Date: Site of Injection:
VIS Pub Date:	VIS Pub Date:	VIS Pub Date:	VIS Pub Date:
Immunization & Dose # DT Td DTaP DTaP-Hib 1 2 3 4 5	Immunization & Dose IPV 1 2 3 4 5	Immunization & Dose MMR 1 2 3	Immunization & Dose HIB 1 2 3 4

HBV	HAV	VARICELLA	FLU
Manufacturer and Lot#:	Manufacturer and Lot#:	Manufacturer and Lot#:	Manufacturer and Lot#:
Expiration Date: Site of Injection:	Expiration Date: Site of Injection:	Expiration Date: Site of Injection:	Expiration Date: Site of Injection:
VIS Pub Date:	VIS Pub Date:	VIS Pub Date:	VIS Pub Date:
Immunization & Dose HBV 1 2 3 4	Immunization & Dose HAV 1 2 3	Immunization & Dose VARICELLA 1 2 3	Immunization & Dose FLU 1 2 3 4

PPV	PCV-7	OTHER	OTHER
Manufacturer and Lot#:	Manufacturer and Lot#:	Manufacturer and Lot#:	Manufacturer and Lot#:
Expiration Date: Site of Injection:	Expiration Date: Site of Injection:	Expiration Date: Site of Injection:	Expiration Date: Site of Injection:
VIS Pub Date:	VIS Pub Date:	VIS Pub Date:	VIS Pub Date:
Immunization & Dose PPV 1 2 3 4 5	Immunization & Dose PCV-7 1 2 3 4 5	Immunization & Dose 1 2 3 4	Immunization & Dose 1 2 3 4

2. Point and click on the **PRINTER ICON** to submit the report to the printer or click another menu option.

VACCINE TRANSFER REPORT

1. From the **OTHER CATEGORY**, point and click on the **VACCINE TRANSFER REPORT**. The blank "Vaccine Transfer Report (Form)" immediately displays.

Figure 19-37: LA – Vaccine Transfer Report Form

VACCINE TRANSFER REPORT
IMMUNIZATION PROGRAM

THE FOLLOWING VACCINE(S) WAS

☐ TRANSFERRED TO
☐ DESTROYED

Vaccine Type	Number of Doses	Lot #	Expiration Date

REMARKS:

WHEN TRANSFER TAKES PLACE
PLEASE SEND REPORT TO:

State of Louisiana
Department of Health and Hospitals
Office of Public Health
Immunization Program
1450 L & A Road
Metairie, LA 70001
Fax: (504) 838-5255

Parish Health Unit or Branch Transferring

Signature

Date of Transfer

EPI-6 10/84

2. Point and click on the **PRINTER ICON** to submit the report to the printer or click another menu option.

VACCINE ADMINISTERED

This report details the number of vaccinations given per vaccine family in each of the different age categories for a specific IRMS or Facility, or both.

1. From the **OTHER Category**, point and click on the **VACCINE ADMINISTERED** report title. The report's limitations/selections window appears.

Figure 19-38: LA – Vaccine Administered Limitations/Selections

Vaccine Administered Report

Reporter Information

Person Completing Report

Phone Number

Limit Report By

☐ Vaccination Date Range — From: To:

○ Facility — --select--

◉ Do Not Limit

☐ District / Region

VFC Eligibility

○ VFC Eligible Vaccinations Only

◉ All Vaccinations

Print Options

◉ By Vaccine

Back | Reset | Create Report

2. Type the **REPORTER INFORMATION** by typing:
   - Person completing the Report
   - Phone Number
3. Type the **LIMIT REPORT BY** information by typing/selecting:
   - **VACCINATION DATE RANGE** – Type the FROM and TO date. The checkbox will automatically get selected.
   - **IRMS/DO NOT LIMIT** – Click the down arrow to choose an IRMS or leave the DO NOT LIMIT default selected. After making the selection, the radio button will automatically get selected.
   - **FACILITY/FACILITY GROUP/DO NOT LIMIT** – Click the down arrow to choose a **FACILITY**, **FACILITY GROUP**, or leave the **DO NOT LIMIT** default selected. After making the selection, the radio button will automatically get selected.
   - **VFC ELIGIBILE VACCINATIONS ONLY / ALL VACCINATIONS** – Click the radio button to the left of your choice.
   - **PRINT OPTIONS** – The default of **BY VACCINE** is automatically chosen.
4. Click either of the available buttons:
   - **RESET** – to erase entries/selections you just made and remain on the window to re-enter criteria.
   - **BACK** – to not submit the report and return to the "Reports Menu" list.
   - **CREATE REPORT** – to run and display the report.

Figure 19-39: LA – Vaccine Administered Report

Vaccine Administered Report
Includes ALL Vaccination Dates

IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Facility: All
Provider Number:
Date Submitted: March 22, 2004
Person completing report:
Phone number:

( ) Health Department
( ) Non-Health Department

Vaccine	Dose #	< 1	1	2	3-5	6	7-10	11-12	13-18	19-24	24-44	45-64	65+	Total
DTaP														
	1	16	0	0	0	0	0	0	0	0	0	0	0	16
	2	15	0	0	0	0	0	0	0	0	0	0	0	15
	3	15	0	0	1	0	0	0	0	0	0	0	0	16
	Total	46	0	0	1	0	0	0	0	0	0	0	0	47

FORECAST (UNIV. CERT. OF IMM.)

The forecast settings window is used to set the forecast for the Universal Certificate of Immunizations.

1. From the **SETTINGS CATEGORY**, point and click on the **FORECAST (Univ.Cert. of Imm) REPORT**. The "Universal Certificate of Immunization Forecast Settings" window appears.

Figure 19-40: LA – Universal Certificate Forecast Settings

Universal Certificate of Immunization Forecast Settings
Vaccine Families marked as checked will be included in forecasts.

	Vaccine Family	Include
	DTaP/DT/Td*	☑
	HIB	☑
	POLIO	☑
	HEP-B 3 DOSE**	☑
	MMR	☑
	VARICELLA	☑
	HEP-A	☑
	FLU	☑
	PNEUMO (PCV7)	☑
	HEP-B 2 DOSE**	☑
	ANTHRAX	☑
	SMALLPOX SHOT/READING	☑

Update Forecast

* DTaP or DT should be given to patients under 7 years old. Td should be given to patients 7 years old or older.
** If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.

2. Uncheck/check (deselect/select) the checkbox under the **INCLUDE** column to the right of the Vaccine Family, and then click the **UPDATE FORECAST** button.

MARYLAND

The following report(s) are available for the state of Maryland:

SCHOOL CERTIFICATE (PDF)

This report is used to show all vaccinations for a particular patient and is used for admittance into school.

1. Perform a **PATIENT SEARCH** and select the patient whose school certificate you want to print.
2. From the **REPORTS** menu, click on **STATE REPORTS**.
3. Click on the **REPORT TITLE**. The report immediately displays in a new browser window (page one is shown below) providing the option to print.

Figure 19-41: MD – School Certificate (PDF)

MARYLAND DEPARTMENT OF HEALTH AND MENTAL HYGIENE IMMUNIZATION CERTIFICATE

CHILD'S NAME DOE (LAST) JOHN (FIRST) ROBERT (MI)

SEX: MALE ☐ FEMALE ☒ BIRTHDATE 01 / 01 / 2001

COUNTY _____ SCHOOL _____ GRADE _____

PARENT OR GUARDIAN NAME MARY PHONE NO. (646)546-5406

ADDRESS 123 MAIN ST CITY GLENDALE ZIP 85301

RECORD OF IMMUNIZATION (See Notes)

VACCINE TYPE							VACCINE TYPE				
DOSE #	DTP/DTaP MO/DAY/YR	DT/Td MO/DAY/YR	Polio MO/DAY/YR	Hib MO/DAY/YR	Hep B MO/DAY/YR	PCV7 MO/DAY/YR	DOSE #	M-M-R MO/DAY/YR	MEASLES MO/DAY/YR	RUBELLA MO/DAY/YR	MUMPS MO/DAY/YR
1							1				
2							2				
3							DOSE #	Varicella MO/DAY/YR	OTHER MO/DAY/YR	OTHER MO/DAY/YR	OTHER MO/DAY/YR
4							1				
5							2				

To the best of my knowledge, the vaccines listed above were administered as indicated.

Office Stamp

1. _____
Signature Title Date
(Medical provider, local health department official, school official, or day care provider only.

2. _____
Signature Title Date

3. _____
Signature Title Date

Lines 2 and 3 are for certification of vaccines given after the initial signature.

LOST OR DESTROYED RECORDS: (Must be reviewed and approved by a medical provider or the local health department. See notes)

I hereby certify that the immunization records of this child have been lost, destroyed or are unobtainable.

Signed: _____ Date: _____
Parent or Guardian

COMPLETE THE APPROPRIATE SECTION BELOW IF THE CHILD IS EXEMPT FROM IMMUNIZATION ON MEDICAL OR RELIGIOUS GROUNDS. ANY IMMUNIZATIONS THAT HAVE BEEN RECEIVED SHOULD BE ENTERED ABOVE.

MEDICAL CONTRAINDICATION:
The above child has a valid medical contraindication to being immunized at this time.

This is a ☐ permanent condition ☐ temporary condition until _____/_____/_____

Check appropriate box, indicate vaccine(s) and reasons: _____

Signed: _____ Date _____
Physician or Health Official

RELIGIOUS OBJECTION:
I am the parent/guardian of the child identified above. Because of my bona fide religious beliefs and practices, I object to any immunizations being given to my child.

Signed: _____ Date: _____

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Center for Immunization
www.EDCP.org (Immunization

VAR (PDF)

This report will display the patient's vaccine administration record in a new browser window.

1. Perform a **PATIENT SEARCH** and select the patient whose vaccine administration report (VAR) you want to display/print.
2. From the **REPORTS** menu, click on **STATE REPORTS**.

3. Click on the **REPORT TITLE**. The report immediately displays in a new browser window and looks similar to the one shown below.

Figure 19-42: MD – Vaccine Administration Record (VAR)

Vaccine Administration Record

Patient Name: BOB BRENLY
Birthdate: 01 / 01 / 2001
Parent/Guardian Signature:_____
(optional)

Provider/Clinic Name & Address:

VACCINE* (Please Circle Appropriate Vaccine)	Date Administered	Vaccine Manufacturer	Vaccine Lot Number	Name and Title of Vaccine Administrator	Date Vaccine Information Statements Given	Publication Date of Vaccine Information Statements
DTaP 1 or DT 1						
DTaP 2 or DT 2						
DTaP 3 or DT 3						
DTaP 4 or DT 4						
DTaP 5 or DT 5						
IPV 1	07/14/2004				2004-07-14	
IPV 2						
IPV 3						
IPV 4						
Hib 1	07/14/2004				2004-07-14	
Hib 2						
Hib 3						
Hib 4						
Pneumococcal Conjugate 1						
Pneumococcal Conjugate 2						
Pneumococcal Conjugate 3						
Pneumococcal Conjugate 4						
MMR 1						
MMR 2						
Varicella 1						
Varicella 2						
History of Varicella Disease: No Date-						
Hepatitis B 1						
Hepatitis B 2						
Hepatitis B 3						
Influenza 1						
Influenza 2						
Td						
Td						
Td						
Hepatitis A 1						
Hepatitis A 2						
Other:						
Other:						

* - When combination vaccines are given, enter the vaccine information in each separate vaccine row.

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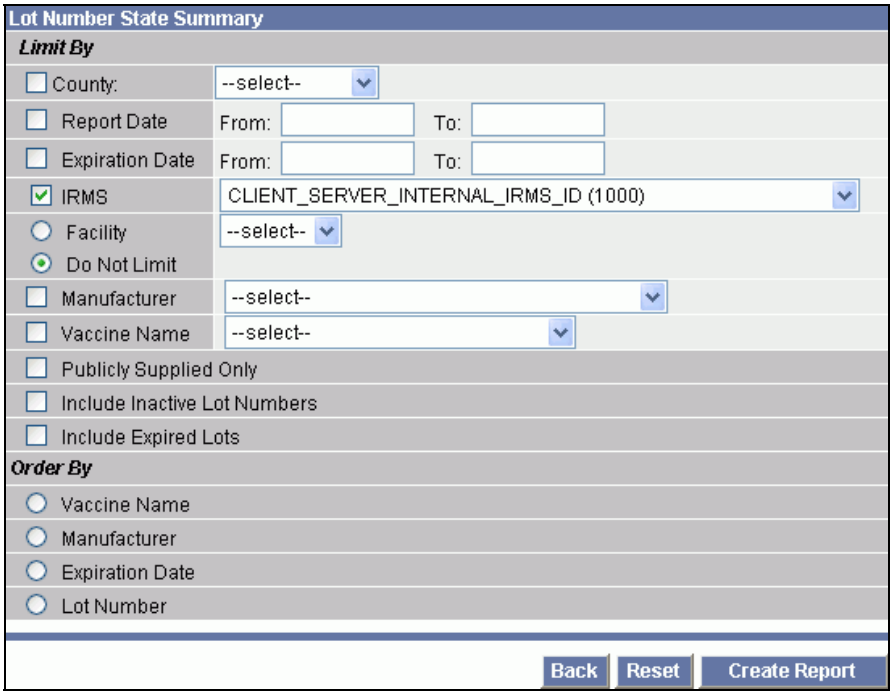
LOT NUMBER STATE SUMMARY

This report reveals total number of doses available, totaled by county to view individual provider's vaccine inventory for any vaccine. A grand total appears at the bottom to see the entire amount on hand for the state.

1. From the **REPORTS** menu, click **STATE REPORTS**.

2. Click the name of the report. The report's "Limitations/Selections" window appears.

Figure 19-43: Lot Number State Summary Limitations/Selections



3. In the **LIMIT BY** section, choose the following if desired:

- **COUNTY** – click the drop-down menu to view/select a valid county. The checkbox will automatically be selected.
- **REPORT DATE** – type the **FROM** and **TO** dates. The checkbox will automatically be selected.
- **EXPIRATION DATE** – type the **FROM** and **TO** dates. The checkbox will automatically be selected.
- **IRMS** – click the drop-down menu arrow to view/select a valid IRMS. The checkbox will automatically be selected.
- **FACILITY/DO NOT LIMIT** – click the drop-down menu to view/select a valid facility or leave the Do Not Limit radio button chosen.
- **MANUFACTURER** – click the drop-down menu to view/select a valid manufacturer.

- **VACCINE NAME** – click the drop-down menu to view/select a valid vaccine.
- **PUBLICLY SUPPLIED ONLY** – click the checkbox to select it.
- **INCLUDE INACTIVE LOT NUMBERS** – click the checkbox to select it.
- **INCLUDE EXPIRED LOTS** – click the checkbox to select it.

4. In the **ORDER BY** section, click one of the radio buttons to organize the report:

- Vaccine Name
- Manufacturer
- Expiration Date
- Manufacturer

5. Click one of the available buttons:

- **BACK** – returns to the "Reports Menu" list.
- **RESET** – erases any newly selected text and redisplays the default settings.
- **CREATE REPORT** – submits the report and displays it in a new Browser window providing the option to print.

Figure 19-44: MD – Lot Number Summary Report

Maryland Lot Number Summary

Report Criteria: **Report Date:** September 22, 2005

County:	All		
IRMS:	1000 - CLIENT_SERVER_INTERNAL_IRMS_ID		
Facility:	All		
Vaccine Name:	All	Include Inactive Lots:	No
Manufacturer:	All	Include Expired Lots:	No
Expiration Date Range:	All	Publicly Supplied Only:	No
Report Date Range:	All	Sort Order:	

County	IRMS	Facility	Lot Number	Vaccine Name	Manufacturer	Expires	Publicly Supplied	Doses Available
MARICOPA	1000	TEST	9514532	DTaP	ABBOT	01/01/2008	Y	96
MARICOPA has a total of 96 available doses.								

There are 96 doses available.

6. Print the report and/or close the Browser window.

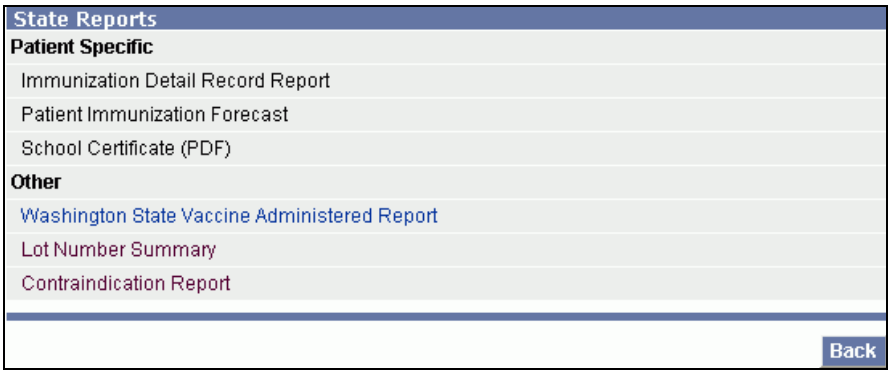
WASHINGTON

The following report categories are available for the state of Washington:

- Patient Specific
- Other

Each category and its report(s) will be illustrated. The "State Reports" window appears.

Figure 19-45: WA – State Reports Menu List



IMMUNIZATION DETAIL RECORD REPORT

This report is used to display a specific patient's immunization record. It displays the Dose Number, Vaccination Date, Patient Age, Manufacturer, Clinic, Lot Number, VIS Date, Supply Source, Name of the person and their suffix that administered the vaccine, comments (if any), PPD reading (if entered), and all contraindications.

1. Perform a **PATIENT SEARCH**.
2. From the **REPORTS** menu, click on **STATE REPORTS**.
3. Under the **PATIENT SPECIFIC** report category, click on the **IMMUNIZATION DETAIL RECORD** report. The report immediately displays in a new browser window and looks similar to the one shown below.

Figure 19-46: WA – Immunization Detail Record

CHILD Profile
Immunization Registry
Immunization Detail Record

Patient Name: JOHN DOE
Patient Address: PO BOX 4455
GLENDALE, ARIZONA 85304
Date of Birth: 01/01/2001
Age: 4y

Vaccine	Dose	Date	Age	Mfg	Clinic	Lot Number	VIS Date	Source	Site	Person Admin
DTaP/DT/Td										
DTaP	1	03/01/2001	2m	AB		9514532		Public		,
DTaP	2	05/01/2001	4m	AB		9514532		Public		,
DTaP	3	07/01/2001	6m	AB		9514532		Public		,
DTaP	4	01/01/2002	12m	AB	TEST	9514532		Public		MARCIA BRADY, MD
HIB										
Hib--unspecified	1	03/01/2001	2m							,
Hib--unspecified	2	05/01/2001	4m							,
Hib--unspecified	3	07/01/2001	6m							,
POLIO										
Polio - unspecified	1	03/01/2001	2m							,
IPV	2	05/05/2001	4m							,
HEP-B 3 DOSE										
Hep B Ped/Adol - Preserv Free	1	01/01/2001	0m							,
MMR										
MMR	1	01/01/2002	12m							,
VARICELLA										
Varicella	1	01/01/2002	12m							,
PNEUMO (PCV7)										
Pneumococcal(PCV7)	1	03/01/2001	2m							,
Pneumococcal(PCV7)	2	05/01/2001	4m							,
Pneumococcal(PCV7)	3	07/01/2001	6m							,

Contraindications	Vaccine	Permanent
None		

Generation Date: September 22, 2005 **By:** SHERRI BULL (IRMS: 1000)

Note: If the above information contains errors or omissions, please contact your medical provider at the location indicated below.

4. Close the browser window and/or print the report when finished.

PATIENT IMMUNIZATION FORECAST

This report is used to view a patient's immunization list. The vaccine, manufacturer, date administered, and status will appear.

1. Perform a **PATIENT SEARCH**.
2. From the **REPORTS** menu, click on **STATE REPORTS**.
3. From the **PATIENT SPECIFIC** category, click on the **PATIENT IMMUNIZATION FORECAST** report title. The report immediately displays in a new browser window and may look similar to the one shown below.

Figure 19-47: WA – Patient Immunization Forecast

CHILD Profile
Immunization Registry

Patient Immunization Forecast

Patient Name: BOB SMITH
Patient Address: 146 MAIN ST
GLENDALE,AZ 85304
Date of Birth: 01/24/2001
Age: 37 m

Vaccine	Mfg	Last Date Admin	Status
HEP-B 3 DOSE**			Past Due
HIB			Past Due
PNEUMO (PCV7)			Past Due
POLIO			Past Due
MMR			Past Due
VARICELLA			Past Due
DTaP/DT/Td*		01/24/2002	Up to Date
HEP-B 2 DOSE**			Up to Date

Generated Date: March 22, 2004 By: SHERRI BULL

Note: As of **March 22, 2004**, the above immunizations are recommended for this patient according to the records entered into CHILD Profile. Please review the immunization history and contraindications. If this immunization history is not complete, the recommendations will not be accurate.

4. Close the browser window and/or print the report when finished.

SCHOOL CERTIFICATE (PDF)

1. Perform a **PATIENT SEARCH**.
2. From the **REPORTS** menu, click on **STATE REPORTS**.
3. From the **PATIENT SPECIFIC** category, click on the **SCHOOL CERTIFICATE** report title. The report immediately displays in a new browser window and may look similar to the one shown below.

Figure 19-48: WA – School Certificate (PDF)

Reviewed for compliance by:_____
Staff Signature
Date: _____ Exemption: YES ☐ NO ☐
(see back)

Washington State Department of Health

CERTIFICATE OF IMMUNIZATION STATUS

Washington State Law (RCW 28A.210.160) requires that all children have a completed Certificate of Immunization Status on file at the school, preschool or a child care facility that they attend. A chart showing which vaccines should be given and when, is printed on the other side of this form.

Child's Last Name	First Name	Sex	Birthdate
SMITH	BOB	M	01/24/2001

Parent/Guardian Name: MARY

Immunization	Type of Vaccine	Dose	Date Given Month	Day	Year
DTaP/DTP/ -DT/Td Diphtheria, Tetanus, Pertussis	DTaP	1	03	24	2001
	DTaP	2	05	24	2001
	DTaP	3	07	24	2001
	DTaP	4	01	24	2002
		5			
POLIO OPV by mouth, IPV by injection		1			
		2			

Immunization	Type of Vaccine	Dose	Date Given Month	Day	Year
MMR Measles (Rubeola), Mumps & Rubella	MMR	1			
	MMR	2			
	MMR				
	MEASLES				
	MUMPS				
	RUBELLA				
HEP B (HBV) Hepatitis B		1			
		2			

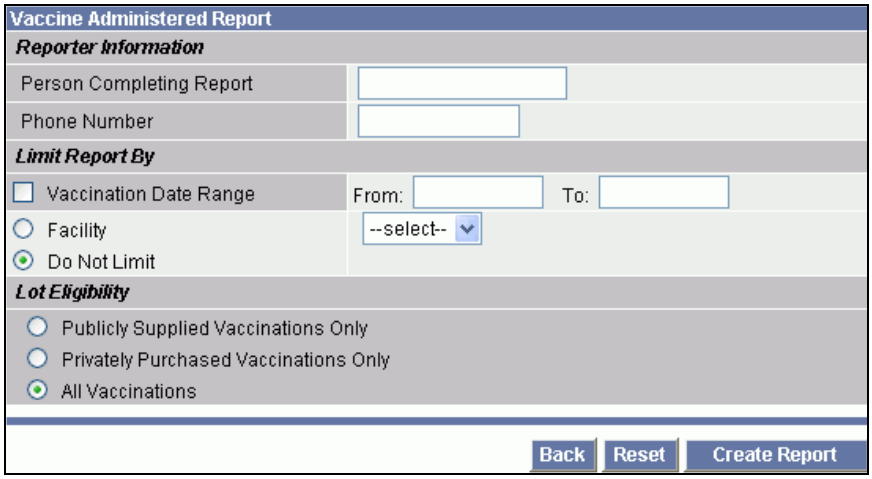
4. Close the browser window and/or print the report when finished.

VACCINE ADMINISTERED REPORT

This report details the number of vaccinations given per vaccine family in each of the different age categories for a specific IRMS or Facility, or both, and the Lot Eligibility—Publicly Supplied, Privately Purchase, or both including by age group.

1. From the **OTHER Category**, point and click on the report name. The report's limitation/selection window appears.

Figure 19-49: WA – Vaccine Administered Report Limitations/Selections



2. Type the **REPORTER INFORMATION** by typing:

- Person completing the Report
- Phone Number

3. Type the **LIMIT REPORT BY** information by typing/selecting:

- **VACCINATION DATE RANGE** – Type the FROM and TO date. The checkbox will automatically get selected.
- **IRMS/DO NOT LIMIT** – Click the down arrow to choose an IRMS or leave the DO NOT LIMIT default selected. After making the selection, the radio button will automatically get selected.
- **FACILITY/DO NOT LIMIT** – Click the down arrow to choose a FACILITY or leave the DO NOT LIMIT default selected. After making the selection, the radio button will automatically get selected.
- **LOT ELIGIBILITY** – Click the radio button to the left of **PUBLICALY SUPPLIED VACCINATIONS**, **PRIVATELY PURCHASES VACCINATIONS**, or **ALL VACCINATIONS**.

4. Click either of the available buttons:

- **RESET** – to erase entries/selections you just made and remain on the window to re-enter criteria.

- **BACK** – to not submit the report and return to the "Reports Menu" list.
- **CREATE REPORT** – to run and display the report.

Figure 19-50: WA - Vaccine Administered Report

Vaccine Administered Report
Vaccination Date Range: 01/01/2000 - 12/31/2003

IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID
Facility: All
Provider Number:
Date Submitted: June 15, 2004
Person completing report: Sherri
Phone number: (602)241-1502

( ) **Health Department**
( ) **Non-Health Department**

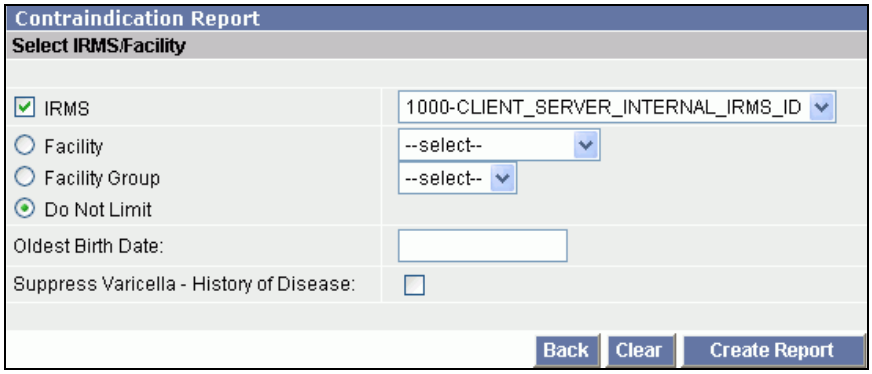
Vaccine	Dose #	Years < 1	1	2	3-5	6	7-10	11-12	13-18	19-24	25-44	45-64	65+	Total
DTaP														
	1	1	0	0	0	0	0	0	0	0	0	0	0	1
	2	1	0	0	0	0	0	0	0	0	0	0	0	1
	3	1	0	0	0	0	0	0	0	0	0	0	0	1
	4	0	1	0	0	0	0	0	0	0	0	0	0	1
	Total	3	1	0	0	0	0	0	0	0	0	0	0	4

CONTRAINDICATION REPORT

This report will display all patients with a registered contraindication. Specifically, the following will display: Patient name (Last, First), SIIS Patient ID, IRMS Patient ID, Birth Date, Sex, Vaccination, Contraindication (If the contraindication wasn't entered by the IRMS requesting the report this text will read "Registered by IRMS"), Permanent or Temporary. The report will be limitable by IRMS or Facility and also based on a Birth Date range.

1. From the **OTHER** category, point and click on the report name. The report's limitation/selection window appears.

Figure 19-51: WA – Contraindication Report Limitations/Selections



2. The fields and their descriptions are listed in the table:

Table 19-1: WA – Contraindication Report Field Descriptions

FIELD	DESCRIPTION
IRMS	To limit the report by a specific IRMS, click the drop-down menu arrow to view/select a valid choice.
FACILITY, FACILITY GROUP, DO NOT LIMIT	To limit the report by Facility or Facility Group, click the drop-down menu arrow to view/select a valid choice.
OLDEST BIRTH DATE	To limit the report by the oldest birth date, type the date into the field.
SUPPRESS VARICELLA – HISTORY OF CHICKENPOX DISEASE	To limit the report to NOT include Varicella – History of Chickenpox Disease, click the checkbox to select/deselect it.

3. Make the desired selections, and click one of the available buttons:

- **BACK** – to return to the "Reports Menu" list.
- **CLEAR** – to erase any newly made selections and remain on the same window to reenter new selections.
- **CREATE REPORT** – to submit the query and display the report in a new browser window.

Figure 19-52: WA – Contraindications Report

CHILD Profile
Contraindication Report

IRMS: CLIENT_SERVER_INTERNAL_IRMS_ID - 1000
Facility: All
Oldest Birth Date: All
Suppress Varicella - History of Disease: N

Patient Name	Birth Date	Gender	SIIS Patient ID	Vaccination	Contraindication	Permanent

Generation Date: May 23, 2005 **By:** SHERRI BULL (IRMS: 1000)

WEST VIRGINIA

The following report categories are available for the state of West Virginia:

- Certificate of Immunization
- Provisional Certificate of Immunization
- Vaccine For Children (VFC)

Each category and its report(s) will be illustrated.

The "State Reports" window appears.

Figure 19-53: WV – State Reports Menu List

State Reports

Certificate of Immunization	Provisional Certificate of Immunization
Blank Form	Blank Form
Current Patient's Form	Current Patient's Form
Vaccine For Children (VFC)	
Vaccine Need	Vaccine Order Form (Blank)
Vaccine On Hand	Vaccine On Hand (Blank)
Vaccine Usage Worksheet	Vaccine Usage Worksheet (Blank)
Provider Activity (Summary)	Schedule
Provider Activity (Detail)	Schedule
Publicly Supplied Vaccines Nearing Expiration	Schedule

Report Print Settings

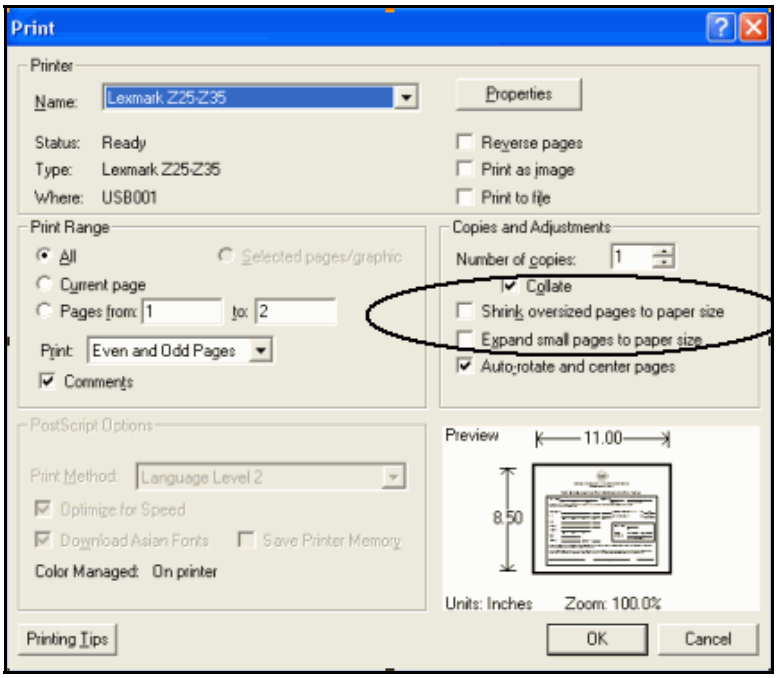
Be sure the "Shrink oversized pages to paper size" box is **unchecked** on the Adobe Acrobat Reader print menu before printing any reports.

Note: The Provider Activity (Summary, and Detail), and Publicly Supplied Vaccines Nearing Expiration) reports use a Scheduler function to run since they take a while to execute. A section is included on "Using the Scheduler" for instructions on setting them up.

PRINTING TIPS FOR ALL ADOBE REPORTS

1. Verify the Printer Settings do not have the "**Shrink oversized pages to paper size**" option checked. From the **FILE** menu, select the **PRINT** option. A dialog box appears.

Figure 19-54: WV - Printer Settings



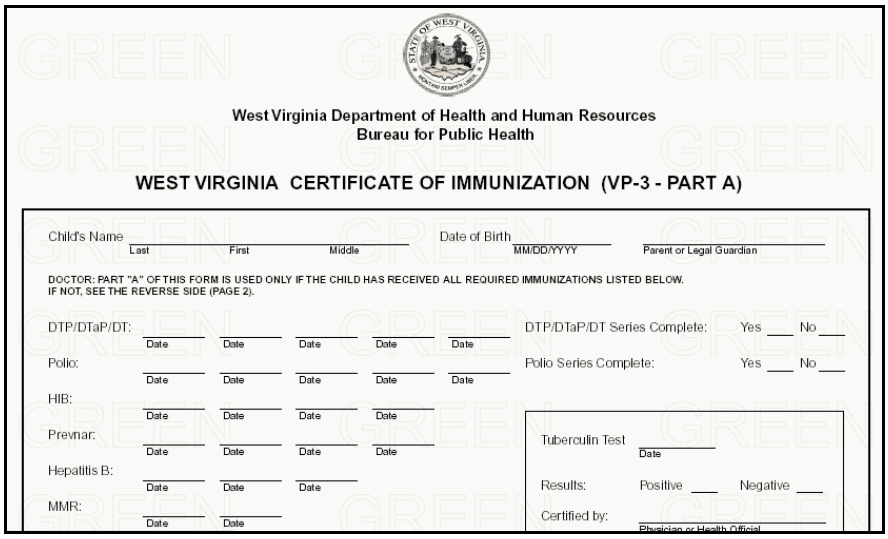
2. If it is checked, uncheck it and click the **OK** button.

BLANK FORM (CERTIFICATE)

This is a two-page report containing three parts: VP-3 Part A, VP-3 Part B, and VP-3 Part C). The word "GREEN" appears as a watermark on both pages.

1. From the **CERTIFICATE OF IMMUNIZATION CATEGORY**, point and click on the **BLANK FORM**. The blank "Certificate of Immunization (Form)" immediately displays.

Figure 19-55: WV – Blank Certificate of Immunization Form



West Virginia Department of Health and Human Resources
Bureau for Public Health

WEST VIRGINIA CERTIFICATE OF IMMUNIZATION (VP-3 - PART A)

Child's Name _____ Last First Middle
Date of Birth _____ MM/DD/YYYY
_____ Parent or Legal Guardian

DOCTOR: PART "A" OF THIS FORM IS USED ONLY IF THE CHILD HAS RECEIVED ALL REQUIRED IMMUNIZATIONS LISTED BELOW.
IF NOT, SEE THE REVERSE SIDE (PAGE 2).

DTP/DTaP/DT: Date Date Date Date Date
DTP/DTaP/DT Series Complete: Yes ___ No ___
Polio: Date Date Date Date Date
Polio Series Complete: Yes ___ No ___
HIB: Date Date Date Date
Prevnar: Date Date Date Date
Hepatitis B: Date Date Date
MMR: Date Date

Tuberculin Test _____ Date
Results: Positive ___ Negative ___
Certified by: _____ Physician or Health Official

2. Point and click on the **PRINTER ICON** to submit the report to the printer or close the browser window and return to the "Reports" window.

CURRENT PATIENT'S FORM

A checkbox for "Temporary Medical Exemption" has been added for the Certificate of Immunization (Green Certificate)

If the record is complete, Part A for shots will entirely print if the record contains:

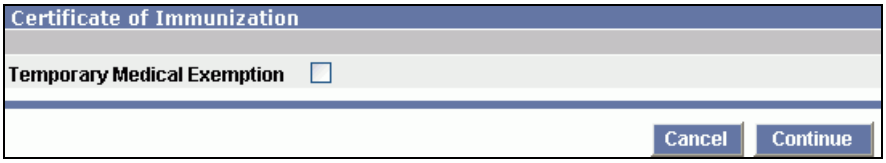
- 3 Doses DTaP/DTP with one dose being on or after the 4th birthday
- 3 doses Polio with one dose being on or after the 4th birthday
- 2 doses MMR with first dose being on or after 12 months of age.

If the record is not complete but "Temporary Medical Exemption" is checked, print shots on Part B side of certificate but print entire

certificate. A "Yes" will print in the History of Varicella if Parent Report of Disease is recorded.

1. Perform a **SEARCH** on a **PATIENT**.
2. From the **REPORTS MENU**, point and click on **STATE REPORTS**.
3. From the **CERTIFICATE OF IMMUNIZATION CATEGORY**, point and click on the **CURRENT PATIENT'S FORM**. The "Certificate of Immunization" window appears.

Figure 19-56: WV – Certificate of Immunization Limitations/Selections



4. Determine whether you want to check the **TEMPORARY MEDICAL EXEMPTION** checkbox.
5. Click one of the available buttons:
   - **CANCEL** – to not submit the report and return to the previous window.
   - **CONTINUE** – to submit and display the report in a new browser window.

Figure 19-57: WV – Certificate of Immunization

West Virginia Department of Health and Human Resources
Bureau for Public Health

WEST VIRGINIA CERTIFICATE OF IMMUNIZATION (VP-3 - PART A)

Child's Name _____ Last First Middle Date of Birth _____ MM/DD/YYYY _____ Parent or Legal Guardian

DOCTOR: PART "A" OF THIS FORM IS USED ONLY IF THE CHILD HAS RECEIVED ALL REQUIRED IMMUNIZATIONS LISTED BELOW. IF NOT, SEE THE REVERSE SIDE (PAGE 2).

DTP/DTaP/DT: _____ Date _____ Date _____ Date _____ Date _____ Date DTP/DTaP/DT Series Complete: Yes ___ No ___

Polio: _____ Date _____ Date _____ Date _____ Date _____ Date Polio Series Complete: Yes ___ No ___

HIB: _____ Date _____ Date _____ Date _____ Date

Prevnar: _____ Date _____ Date _____ Date _____ Date

Hepatitis B: _____ Date _____ Date _____ Date

MMR: _____ Date _____ Date

Varicella: _____ Date _____ Date or history of chickenpox _____ Date

Tuberculin Test _____ Date

Results: Positive ___ Negative ___

Certified by: _____ Physician or Health Official

ALL APPROPRIATE DOSES AND DATES INCLUDING BIRTH DATE MUST BE ENTERED AND THE CERTIFICATE SIGNED BELOW BY A PHYSICIAN OR AUTHORIZED PERSON AND DATED IN ORDER FOR THE CHILD TO ATTEND SCHOOL.

I HAVE REVIEWED THE RECORDS AVAILABLE AND TO THE BEST OF MY KNOWLEDGE THE ABOVE-NAMED CHILD HAS BEEN ADEQUATELY IMMUNIZED AGAINST DIPHTHERIA, TETANUS, PERTUSSIS, POLIO, MEASLES AND RUBELLA AS REQUIRED BY WEST VIRGINIA LAW FOR SCHOOL ATTENDANCE.

_____ Physician or Clinic Name _____ Physician or Authorized Signature _____ Date

Child's Name DOE, JOHN Last First Middle Date of Birth 01/01/2001 MM/DD/YYYY MARY Parent or Legal Guardian

DOCTOR: IF THE CHILD HAS NOT RECEIVED THE REQUIRED DOSES LISTED IN PART A, PLEASE COMPLETE PART B OR PART C AS APPROPRIATE, SIGN AND DATE.

TEMPORARY MEDICAL EXEMPTION (VP-3 - PART B)

I CERTIFY THAT THAT ABOVE-NAMED CHILD HAS RECEIVED THE IMMUNIZATIONS LISTED BELOW AND HAS COMMENCED A SCHEDULE TO COMPLETE THE REQUIRED IMMUNIZATIONS. ADDITIONAL IMMUNIZATIONS ARE NOT MEDICALLY INDICATED AT THIS TIME.

TYPE VACCINE	DATE	DATE	DATE	DATE	DATE
DTaP	03/01/2001	05/01/2001	07/01/2001	01/01/2002	
Polio	03/01/2001				
Prevnar	03/01/2001	05/01/2001	07/01/2001		
HIB	03/01/2001	05/01/2001	07/01/2001		
Hepatitis B	01/01/2001				
MMR	01/01/2002				
Varicella	01/01/2002		Or history of chickenpox Date:		
Tuberculin Test					

Expiration Date (MM/DD/YY) _____ (SHOULD BE 15 DAYS AFTER NEXT APPOINTMENT)

Signed _____ Physician or Health Official Date 11/23/2004

PERMANENT MEDICAL EXEMPTION (VP-3 - PART C)

DEMO

6. Point and click on the **PRINTER ICON** to submit the report to the printer or close the browser window to return to the "Reports" window.

PROVISIONAL CERTIFICATE OF IMMUNIZATION

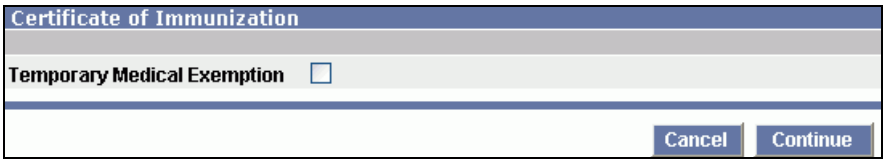
The Provisional Certificate of Immunization (Yellow Certificate) has been modified to include a checkbox for "Temporary Medical Exemption" (Yellow Certificate).

If the "Temporary Medical Exemption" checkbox is NOT checked, Part A should be filled in and both sides will be printed.

If the "Temporary Medical Exemption" checkbox IS checked, Part B will be filled in and both sides will be printed. A "YES" will print in the History of Varicella if Parent Report of Disease is recorded.

1. Perform a **SEARCH** on a **PATIENT**.
2. From the **REPORTS MENU**, point and click on **STATE REPORTS**.
3. From the **PROVISIONAL CERTIFICATE OF IMMUNIZATION CATEGORY**, point and click on the **CURRENT PATIENT'S FORM**. The "Certificate of Immunization" window appears.

Figure 19-58: WV – Provisional Certificate of Immunization Limitations/Selections



4. Determine whether you want to check the **TEMPORARY MEDICAL EXEMPTION** checkbox.
5. Click one of the available buttons:
   - **CANCEL** – to not submit the report and return to the previous window.
   - **CONTINUE** – to submit and display the report.

Figure 19-59: WV – Provisional Certificate of Immunization Report

West Virginia Department of Health and Human Resources
Bureau for Public Health

WEST VIRGINIA PROVISIONAL CERTIFICATE OF IMMUNIZATION (VP-3 - PART A)

Child's Name _____ Date of Birth _____ _____
Last First Middle MM/DD/YYYY Parent or Legal Guardian

DOCTOR: PART "A" OF THIS FORM IS USED ONLY IF THE CHILD HAS RECEIVED ALL REQUIRED IMMUNIZATIONS LISTED BELOW.
IF NOT, SEE THE REVERSE SIDE (PAGE 2).

DTP/DTaP/DT: _____ _____ _____ _____ _____ DTP/DTaP/DT Series Complete: Yes ___ No ___
Date Date Date Date Date

Polio: _____ _____ _____ _____ _____ Polio Series Complete: Yes ___ No ___
Date Date Date Date Date

HIB: _____ _____ _____ _____
Date Date Date Date

Prevnar: _____ _____ _____ _____
Date Date Date Date

Hepatitis B: _____ _____ _____
Date Date Date

MMR: _____ _____
Date Date

Varicella: _____ _____ or history of chickenpox _____
Date Date Date

Tuberculin Test _____
Date

Results: Positive ___ Negative ___

Certified by: _____
Physician or Health Official

ALL APPROPRIATE DOSES AND DATES INCLUDING BIRTH DATE MUST BE ENTERED AND THE CERTIFICATE SIGNED BELOW BY A PHYSICIAN OR AUTHORIZED PERSON AND DATED IN ORDER FOR THE CHILD TO ATTEND SCHOOL.

I HAVE REVIEWED THE RECORDS AVAILABLE AND TO THE BEST OF MY KNOWLEDGE THE ABOVE-NAMED CHILD HAS BEEN ADEQUATELY IMMUNIZED AGAINST DIPHTHERIA, TETANUS, PERTUSSIS, POLIO, MEASLES AND RUBELLA AS REQUIRED BY WEST VIRGINIA LAW FOR SCHOOL ATTENDANCE.

_____ _____ _____
Physician or Clinic Name Physician or Authorized Signature Date

Child's Name DOE, JOHN _____ Date of Birth 01/01/2001 _____ MARY _____
Last First Middle MM/DD/YYYY Parent or Legal Guardian

DOCTOR: IF THE CHILD HAS NOT RECEIVED THE REQUIRED DOSES LISTED IN PART A, PLEASE COMPLETE PART B, SIGN AND DATE.

TEMPORARY MEDICAL EXEMPTION (VP-3 - PART B)

I CERTIFY THAT THAT ABOVE-NAMED CHILD HAS RECEIVED THE IMMUNIZATIONS LISTED BELOW AND HAS COMMENCED A SCHEDULE TO COMPLETE THE REQUIRED IMMUNIZATIONS. ADDITIONAL IMMUNIZATIONS ARE NOT MEDICALLY INDICATED AT THIS TIME.

TYPE VACCINE	DATE	DATE	DATE	DATE	DATE
DTaP	03/01/2001	05/01/2001	07/01/2001	01/01/2002	
Polio	03/01/2001				
Prevnar	03/01/2001	05/01/2001	07/01/2001		
HIB	03/01/2001	05/01/2001	07/01/2001		
Hepatitis B	01/01/2001				
MMR	01/01/2002				
Varicella	01/01/2002		Or history of chickenpox Date:		
Tuberculin Test					

Expiration Date (MM/DD/YY) _____
(SHOULD BE 15 DAYS AFTER NEXT APPOINTMENT)

Signed _____ Date 11/23/2004
Physician or Health Official

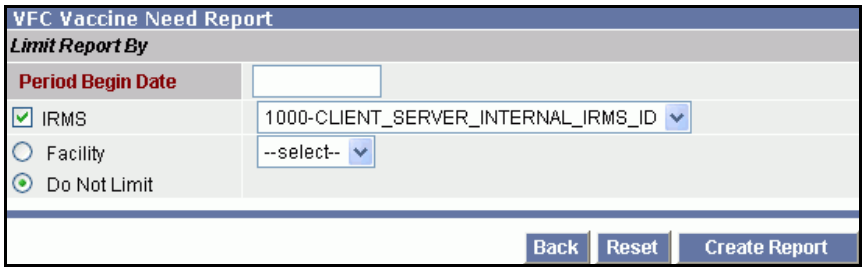
DEMO

VACCINE NEED

This is a form used for vaccine projections. Part A counts all publicly supplied vaccines regardless of patients VFC eligibility. Part B counts all VFC Eligible only.

1. From the **VACCINE FOR CHILDREN CATEGORY**, point and click on **VACCINE NEED**. The "limitation/selection" window appears.

Figure 19-60: WV – VFC Vaccine Need Limitations/Selections



2. Type a date using the format mmddyyyy in the **PERIOD BEGIN DATE**.
3. Click the drop-down arrow to view/select a valid choice for IRMS.
4. Click the drop-down arrow to view a list of valid choices for the **FACILITY**.
5. Click the **RESET** button to erase any newly typed entries or **CREATE REPORT** to display the report in a new browser window.

Figure 19-61: WV – Provider Profile – Vaccine Need Report

PROVIDER PROFILE - VACCINE NEED

Note: The following information must be based on data and not estimates. Please document the data source for the information in the boxes provided.

Part A. For the 12 month period begining 01/01/2004 project the number of children who will receive vaccinations at your health facility, by age group.

< One Year	1-6 Years	7-18 Years	Total
0	0	0	0

Part B. Of the total number for each group entered above, how many children are expected to be VFC eligible, by category?

	< One Year	1-6 Years	7-18 Years	Total
Medicaid	0	0	0	0
Uninsured	0	0	0	0
Native Amer. or Alaskan	0	0	0	0
Underinsured*	0	0	0	0
Total	0	0	0	0

* Underinsured children are eligible for the VFC program only at a Federally Qualified Health Center (FQHC) or a federally designated Rural Health Clinic (RHC).

Type of data used to determine profile:

- ☐ A. Benchmarking Data
- ☐ B. Medicaid Claims Data
- ☐ C. Provider Encounter Data
- ☑ D. Registry Data
- ☐ E. Vaccine Replacement Data
- ☐ F. Doses Adminstered Data*

6. Point and click on the **PRINTER ICON** to submit the report to the printer or close the browser and return to the "Reports" window.

VACCINE ORDER FORM (BLANK)

Note: Menactra was added for v3.0. Tdap was added for v3.0.P.

1. From the **VACCINE FOR CHILDREN CATEGORY**, point and click on **VACCINE ORDER FORM (BLANK)** report. The "Vaccine Order Form" immediately displays in a new browser window.

Figure 19-62: WV – Vaccine Order Form Report

Vaccine Order Form

Vaccines for Children Program

Complete information in boxes one through four. If PIN number is unknown or assistance is required, call the Immunization Program at (800) 642-3634.

1. Date submitted:	2. VFC PIN (state assigned):
3. Facility name:	

Vaccines	Unit Size	Doses Ordered	Program Use Only: Other	Program Use Only: Total
DTaP	10 doses			

2. Point and click on the **PRINTER ICON** to submit the report to the printer or close the browser window and return to the "Reports" window.

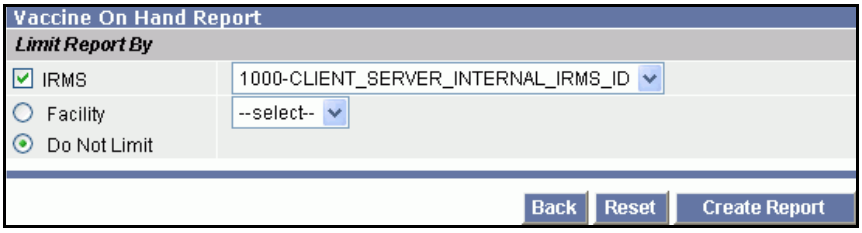
VACCINE ON HAND (FILLED IN)

This report is actually a form used for inventory purposes and includes all publicly supplied vaccines.

Note: Menactra was added for v3.0. Tdap was added for v3.0.P.

1. From the **VACCINE FOR CHILDREN CATEGORY**, point and click on **VACCINE ON HAND**. The "limitation/selection" window appears.

Figure 19-63: WV - Vaccine on Hand Limitations/Selections



2. Click the drop-down arrow and select a valid **IRMS** and/or **FACILITY**.

3. Click one of the available buttons:

- **BACK** – to return to the Reports menu.
- **RESET** – to erase any newly typed entries and remain on the window to re-enter selections.
- **CREATE REPORT** – to display the report in a new browser window.

Figure 19-64: WV – Vaccine on Hand Report

West Virginia Vaccine On Hand Report

Provider Name: TEST **Date:** 08/30/2005

PIN Number:

VACCINE TYPE	LOT NUMBER(s) ON HAND	EXPIRATION DATE(s)	DOSES ON HAND
DTaP	54 9514532	12/31/2008 01/01/2008	150 96
DT			
Td			
IPV			
MMR			
Hib			
Hepatitis B			
Varicella			
Pneumococcal			
Influenza			
Prevnar			
Pediarix			
Menactra			

NOTE: This form must be used in conjunction with a physical inventory.
I certify that the information contained in this report has been verified by a physical inspection of this site's VFC vaccine inventory.

_____ Print Name

_____ Signature

4. Point and click on the **PRINTER ICON** to submit the report to the printer or close the browser and return to the "Reports" window.

VACCINE ON HAND (BLANK)

This report is actually a form that is used for inventory purposes.

Note: Menactra was added for v3.0. Tdap was added for v3.0.P.

1. From the **VACCINE FOR CHILDREN CATEGORY**, point and click on **VACCINE ON HAND (BLANK)**. The "Vaccine on Hand Report-Blank" report immediately appears.

Figure 19-65: WV – Vaccine On Hand Blank Report

West Virginia Vaccine On Hand Report

Provider Name: _____ Date: _____

PIN Number: _____

VACCINE TYPE	LOT NUMBER(s) ON HAND	EXPIRATION DATE(s)	DOSES ON HAND
DTaP			
DT			
Td			
IPV			
MMR			
Hib			
Hepatitis B			
Varicella			
Pneumococcal			
Influenza			
Prevnar			
Pediarix			
Menactra			

NOTE: This form must be used in conjunction with a physical inventory.

I certify that the information contained in this report has been verified by a physical inspection of this site's VFC vaccine inventory.

_____ _____

Print Name Signature

VOH-705 June 2005

2. Click the **PRINT** button to print the report or **CLOSE** the browser window.

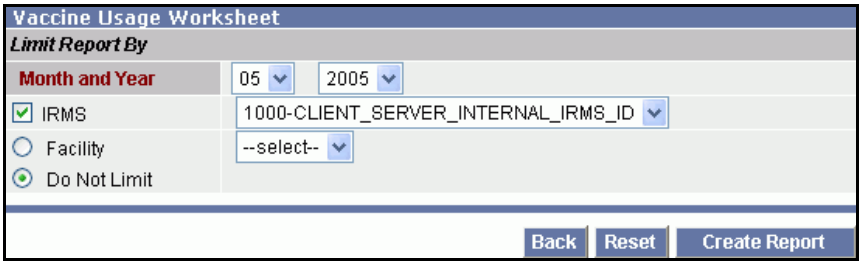
VACCINE USAGE WORKSHEET (FILLED IN)

This report displays a count to include all publicly supplied vaccines.

Note: Menactra was added for v3.0. Tdap was added for v3.0.P.

1. From the **VACCINE FOR CHILDREN CATEGORY**, point and click on **VACCINE USAGE WORKSHEET** report. The report's limitation/selection window appears.

Figure 19-66: WV – Vaccine Usage Worksheet Limitations/Selections



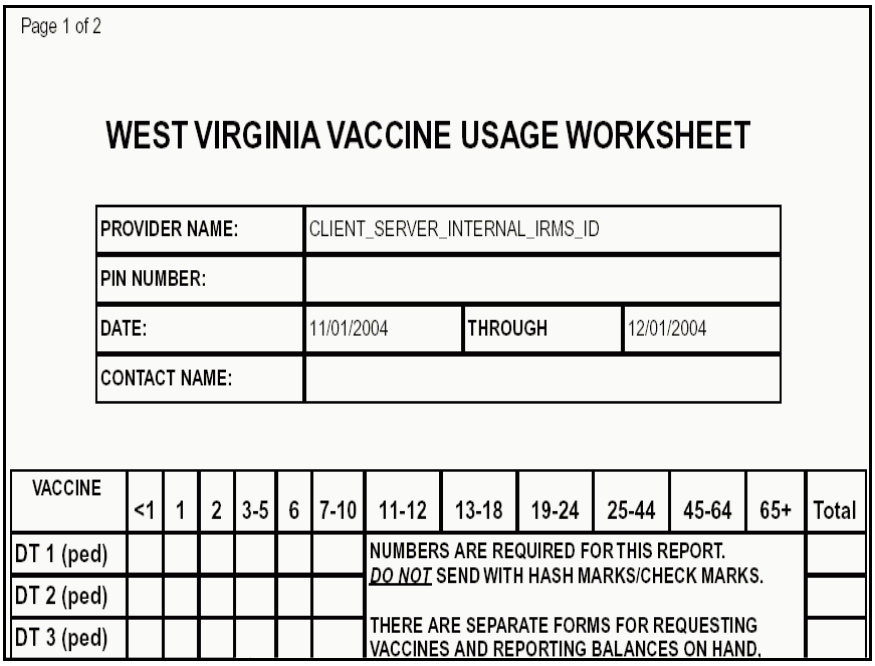
2. You must click on the drop-down menu arrows to select **MONTH, YEAR**, and **IRMS**.

3. To limit the report by a specific **FACILITY**, click the down-arrow and click one from the list of valid choices.

4. Click one of the available buttons:

   - **BACK** – to return to the Reports menu.
   - **RESET** – to erase any newly typed entries and remain on the window to re-enter selections.
   - **CREATE REPORT** – to display the report in a new browser window.

Figure 19-67: WV – Vaccine Usage Worksheet (Filled In)



Page 1 of 2

WEST VIRGINIA VACCINE USAGE WORKSHEET

PROVIDER NAME:	CLIENT_SERVER_INTERNAL_IRMS_ID		
PIN NUMBER:			
DATE:	11/01/2004	THROUGH	12/01/2004
CONTACT NAME:			

VACCINE	<1	1	2	3-5	6	7-10	11-12	13-18	19-24	25-44	45-64	65+	Total
DT 1 (ped)							NUMBERS ARE REQUIRED FOR THIS REPORT. *DO NOT* SEND WITH HASH MARKS/CHECK MARKS. THERE ARE SEPARATE FORMS FOR REQUESTING VACCINES AND REPORTING BALANCES ON HAND.						
DT 2 (ped)													
DT 3 (ped)													

5. Point and click on the **PRINTER ICON** to submit the report to the printer or close the browser and return to the "Reports" window.

VACCINE USAGE WORKSHEET (BLANK)

This report is actually a form that is used for inventory purposes.

Note: Menactra was added for v3.0. Tdap was added for v3.0.P.

1. From the **VACCINE FOR CHILDREN CATEGORY**, point and click on **VACCINE USAGE WORKSHEET (BLANK)**. The "Vaccine Usage Worksheet-Blank" report immediately appears.

Figure 19-68: WV – Vaccine Usage Worksheet (Blank)

VFC Vaccine Usage Worksheet

Provider Name:			Numbers are required for this report. Do not send with hash marks/check marks.
Pin Number:			
Usage from:	Date:	to	Date:
Contact Name:			There are separate forms for requesting vaccines and reporting balances on hand, expiration, spoilage and wastage.

Ages 19+ for Health Departments Only

Vaccine	age <1	age 1	age 2	ages 3-5	age 6	ages 7-10	ages 11-12	ages 13-18	ages 19-24	ages 25-44	ages 45-64	ages 65+	Total
DT 1 (ped)						Enter totals for ALL rows in the Total column.							
DT 2 (ped)													
DT 3 (ped)													
DT 4 (ped)													
Td 1 (adult)													

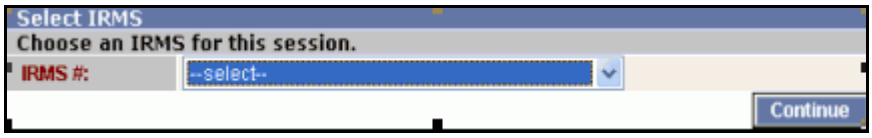
2. Click the **PRINT** button to print the report or CLOSE the browser window

PROVIDER ACTIVITY (SUMMARY) (IRMS USE ONLY)

This report may take a while to run, so this report is set up to run on a **SCHEDULE** to run them after hours using the "Scheduler" window. Refer to the section titled "Using the Scheduler" for instructions.

1. Login as a **Registry Client** user. The "Choose an IRMS" window appears.

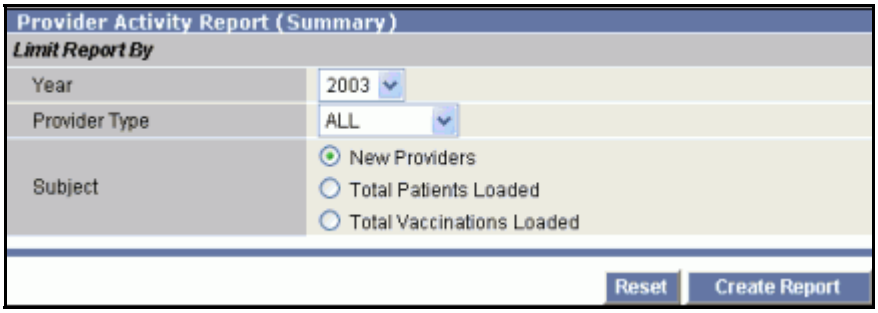
Figure 19-69: WV – Registry - Select IRMS



2. Click on the drop-down arrow to view/select an **IRMS #** and then click the **CONTINUE** button.

3. Click on the report's title and click **RUN** or **SCHEDULE**. The "limitation/selection" window appears. If you chose Schedule, the "Scheduler" window appears with the report's limitation/selection window at the top. Refer to the section titled "Using the Scheduler" for instructions.

Figure 19-70: WV – Provider Activity Report Limitations/Selections



4. In the **LIMIT REPORT BY** section, click on the drop-down arrow to view/select the **YEAR** and the **PROVIDER TYPE**.

5. Click one of the radio buttons to isolate the "**subject**" for the report:

   - New Providers
   - Total Patients Loaded
   - Total Vaccinations Loaded

6. Click the **RESET** button to erase the selections or the **CREATE REPORT** button to display the report in a new browser window. A copy of each report is shown below.

Figure 19-71: WV - Provider Activity Report

Provider Activity Report (Summary)

Subject: New Providers **Year:** 2003 **Provider Type:** ALL

Provider Type	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD
UNDEFINED	0	0	0	0	0	0	0	1	0	39	0	0	40
Total	0	0	0	0	0	0	0	1	0	39	0	0	40

Provider Activity Report (Summary)

Subject: Total Patients Loaded **Year:** 2003 **Provider Type:** ALL

Provider Type	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD
UNDEFINED	0	0	0	0	0	0	0	5	0	8806	5	0	8816
Total	0	0	0	0	0	0	0	5	0	8806	5	0	8816

Provider Activity Report (Summary)

Subject: Total Vaccinations Loaded **Year:** 2003 **Provider Type:** ALL

Provider Type	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD
UNDEFINED	0	0	0	0	0	0	0	1	0	31498	3	0	31502
Total	0	0	0	0	0	0	0	1	0	31498	3	0	31502

7. Point and click on the **PRINTER ICON** to submit the report to the printer or close the browser window and return to the "Reports" window.

Note: The Subject Line on the report reveals the radio button chosen on the "limitation/selection" window.

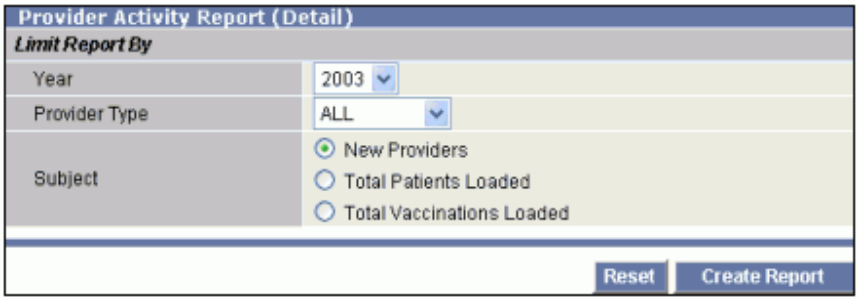
PROVIDER ACTIVITY (DETAIL) (IRMS USE ONLY)

This report may take a while to run, so it is set up to run on a **SCHEDULE** to run them after hours using the "Scheduler" window. Refer to the section titled "Using the Scheduler" for instructions.

1. Login with as a Registry Client user. The "Choose an IRMS" window appears.

2. Click on the drop-down arrow to view/select an **IRMS #** and then click the **CONTINUE** button.
3. Click on the report's title and click **RUN** or **SCHEDULE**. The "limitation/selection" window appears. If you chose Schedule, the "Scheduler" window appears with the report's limitation/selection window at the top. Refer to the section titled "Using the Scheduler" for instructions.

Figure 19-72: WV – Provider Activity Report Limitations/Selections



4. In the **LIMIT REPORT BY** section, click on the drop-down arrow to view/select the **YEAR** and the **PROVIDER TYPE**.
5. Click one of the radio buttons to isolate the "subject" for the report:
   - New Providers
   - Total Patients Loaded
   - Total Vaccinations Loaded

6. Click the **RESET** button to erase the selections or the **CREATE REPORT** button to display the report in a new browser window. A copy of each report is shown below.

Figure 19-73: WV – Provider Activity Report

Provider Activity Report (Details)

Subject: New Providers **Year:** 2003 **Provider Type:** ALL

IRMS	Name
1	PCIC_SOURCE
13	WORLAND
1000	CLIENT_SERVER_INTERNAL_IRMS_ID

Provider Activity Report (Details)

Subject: Total Patients Loaded **Year:** 2003 **Provider Type:** ALL

IRMS	Name	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD
1	PCIC_SOURCE	0	0	0	0	0	0	0	0	0	6606	0	0	6606
13	WORLAND	0	0	0	0	0	0	0	0	0	2200	0	0	2200
1000	CLIENT_SERVER_INTERNAL_IRMS_ID	0	0	0	0	0	0	0	5	0	0	5	0	10
	Total	0	0	0	0	0	0	0	5	0	8806	5	0	8816

Provider Activity Report (Details)

Subject: Total Vaccinations Loaded **Year:** 2003 **Provider Type:** ALL

IRMS	Name	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD
1	PCIC_SOURCE	0	0	0	0	0	0	0	0	0	18	0	0	18
13	WORLAND	0	0	0	0	0	0	0	0	0	31480	0	0	31480
1000	CLIENT_SERVER_INTERNAL_IRMS_ID	0	0	0	0	0	0	0	1	0	0	3	0	4
	Total	0	0	0	0	0	0	0	1	0	31498	3	0	31502

7. Point and click on the **PRINTER ICON** to submit the report to the printer or close the browser window and return to the "Reports" window.

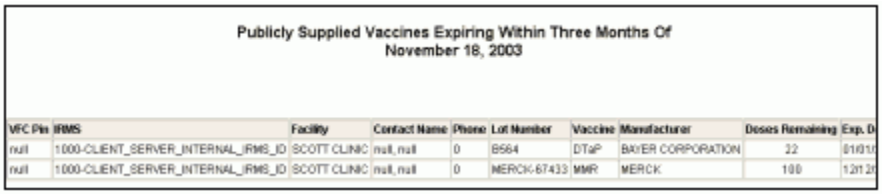
PUBLICLY SUPPLIED VACCINES NEARING EXPIRATION (IRMS USE ONLY)

This report may take a while to run, so you set up the report using a **SCHEDULE** to run them after hours using the "Scheduler" window. Refer to the section titled "Using the Scheduler" for instructions.

1. Login with as a Registry Client user. The "Choose an IRMS" window appears.

2. Click on the drop-down arrow to view/select an **IRMS #** and then click the **CONTINUE** button.
3. Click on the report's title and click **RUN** or **SCHEDULE**. The "limitation/selection" window appears. If you chose Schedule, the "Scheduler" window appears with the report's limitation/selection window at the top. Refer to the section titled "Using the Scheduler" for instructions.

Figure 19-74: WV – Publicly Supplied Vaccines Nearing Expiration Report



Publicly Supplied Vaccines Expiring Within Three Months Of
November 18, 2003

VFC Pin	IRMS	Facility	Contact Name	Phone	Lot Number	Vaccine	Manufacturer	Doses Remaining	Exp. D
null	1000-CLIENT_SERVER_INTERNAL_IRMS_ID	SCOTT CLINIC	null, null	0	B564	DTaP	BAYER CORPORATION	22	01/01/
null	1000-CLIENT_SERVER_INTERNAL_IRMS_ID	SCOTT CLINIC	null, null	0	MERCK-67433	MMR	MERCK	100	12/12/

4. Point and click on the **PRINTER ICON** to submit the report to the printer or close the browser window and return to the "Reports" window.

WYOMING

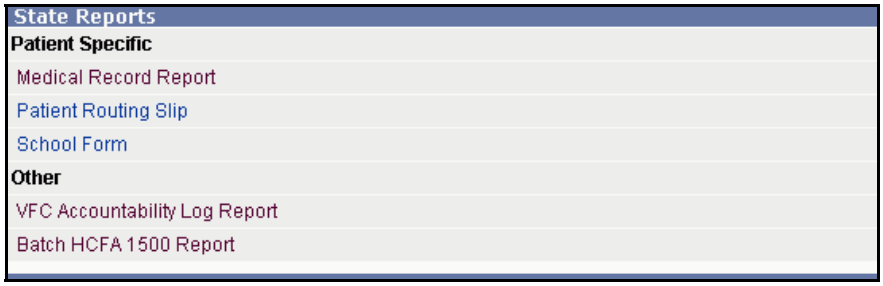
The following report categories are available for the state of Wyoming.

- Patient Specific
- Other

Each category and its report(s) will be illustrated.

The "State Reports" window appears.

Figure 19-75: WY – State Reports Menu List



MEDICAL RECORD REPORT

1. Perform a **SEARCH** on a **PATIENT**.
2. From the **REPORTS MENU**, point and click on **STATE REPORTS**.
3. From the **PATIENT SPECIFIC CATEGORY**, point and click on the **MEDICAL RECORD REPORT**. The Patient's "Medical Record Report" displays.

Figure 19-76: WY – Medical Record Report

Wyoming Medical Record Report

Clinic Name:	CAD MID	**Patient's Physician:**	
Clinic Address:	100 MAIN STREET	**Phone:**	5435435435
Patient Name:	JOHN J DOE	**Date of Birth:**	06/02/2001
Patient Address:	111 SOMEWHERE	**P.O. Box:**	
City:	ANYWHERE	**State:** LOUISIANA	**Zip:** 71101
Patient Phone Number:	(840)652-1459		
Allergies:			
History of Chickenpox?:	N		
VFC Eligibility:	Medicaid		
Contraindications:			

Anatomical Site Legend

LD:Left Arm Intramuscular | LSQ:Left Arm Subcutaneous | LVL:Left Thigh Intramuscular | ORL:Oral | RD:Right Arm Intramuscular | RSQ:Right Arm Subcutaneous | RVL:Right Thigh Intramuscular | LAI:Left Arm Intradermal | LTS:Left Thigh Subcutaneous | LTI:Left Thigh Intradermal | RAI:Right Arm Intradermal | RTS:Right Thigh Subcutaneous | RTI:Right Thigh Intradermal | NAS:Nasal |

Vaccine	Date Given	VIS Form		Manuf Abbr.	Lot Number	Site/ Route	Vaccinator
		Pub Date	Date Given				
DTaP							
	08/02/2001						
	10/03/2001						
	12/06/2001						
IPV							
	08/02/2001						
	10/03/2001						
	12/06/2001						
Hib--unspecified							
	08/02/2001						
	10/03/2001						
	12/06/2001						

4. Point and click on the **PRINTER ICON** to submit the report to the printer or close the browser and return to the "Reports" window.

PATIENT ROUTING SLIP

The printing format for the Patient Routing Slip allows up to 10 doses per vaccine to be displayed on the report.

1. Perform a **SEARCH** on a **PATIENT**.
2. From the **REPORTS MENU**, point and click on **STATE REPORTS**.
3. From the **PATIENT SPECIFIC CATEGORY**, point and click on the **PATIENT ROUTING SLIP**. The Patient's "Routing Slip" displays.

Figure 19-77: WY – Patient Routing Slip

Patient Routing Slip

Facility: VALLEY HEALTH ASSOCIATES
Date: Nov 18, 2004

Patient ID: 2923
Name: JOHN W BLAKE
Birth Date: 09/03/1970
Gender: MALE
Parent/Guardian: JOHN
Allergies:
Contraindications:

Phone: (304)733-6868
Street: 5891 DAVIS CREEK RD LT 2
P.O.Box:
City: BARBOURSVILLE
State: WV
Zip: 25504

Vaccination History

Vaccine Name	Dose 1	Dose 2	Dose 3	Dose 4	Dose 5	Dose 6	Dose 7	Dose 8	Dose 9	Dose 10
DTaP	11/18/2004									
PPD Test	10/02/2003	10/04/2004								

Forecast Vaccines

Vaccine Family	Dose	Rec. Date	Manuf.	Lot	Site/Route	Nurse
HEP-B 3 DOSE**	1	09/03/1970				
DTaP/DT/Td*	1	11/03/1970				
POLIO	1	11/03/1970				
FLU	1	03/03/1971				
MMR	1	09/03/1971				
VARICELLA	1	09/03/1971				

* DTaP or DT should be given to patients under 7 years old. Td should be given to patients 7 years old or older.
** If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.

4. Point and click on the **PRINTER ICON** to submit the report to the printer or close the browser and return to the "Reports" window.

SCHOOL FORM

The printing format for the School Form will allow up to 10 doses to be displayed. The Adult Td vaccine will be separated from the DTaP family and print that vaccine as a separate line item.

1. Perform a **SEARCH** on a **PATIENT**.
2. From the **REPORTS MENU**, point and click on **STATE REPORTS**.
3. From the **PATIENT SPECIFIC CATEGORY**, point and click on the **SCHOOL FORM**. The Patient's "School Form" displays.

Figure 19-78: WY – Patient's School Form

Official State Record of Immunization

Day Care/Pre-School/Head Start/Public and Private Schools K-12
Effective June 1, 2001

This record is part of the child's or students permanent record (cumulative folder) and shall transfer with that record. Health Department personnel shall have access to this record as deemed necessary.

Name of Child/Student: JOHN W BLAKE
Parent or Guardian: JOHN
Address: 5891 DAVIS CREEK RD LT 2
City: BARBOURSVILLE **State:** WEST VIRGINIA
Date of Birth: 09/03/1970
Phone: (304)733-6868
P.O. Box:
Zip: 25504

Vaccine	MONTH/DAY/YEAR EACH DOSE WAS GIVEN									
	Dose 1	Dose 2	Dose 3	Dose 4	Dose 5	Dose 6	Dose 7	Dose 8	Dose 9	Dose 10
DTap/DTP/DT	11/18/2004									
PPD Test	10/02/2003	10/04/2004								

History of Chicken Pox: none

4. Point and click on the **PRINTER ICON** to submit the report to the printer or close the browser and return to the "Reports" window.

VFC Accountability Log

The VFC Eligibility Summary on the report counts individuals receiving the vaccines. The VFC Vaccination Summary counts vaccines administered.

1. From the **OTHER CATEGORY**, point and click on the **VFC ACCOUNTABILITY LOG**. The report's limitation/selection window appears.

Figure 19-79: WY – VFC Accountability Log Limitations/Selections

VFC Accountability Log
☐ Include Ineligible Patients
Limit Report by
☐ Vaccine Date Range: From To
○ Facility --select--
◉ Do Not Limit
Back Reset Create Report
Date Format: mm/dd/yyyy

2. Point and click the checkbox if you want to "**INCLUDE INELIGIBLE PATIENTS**."

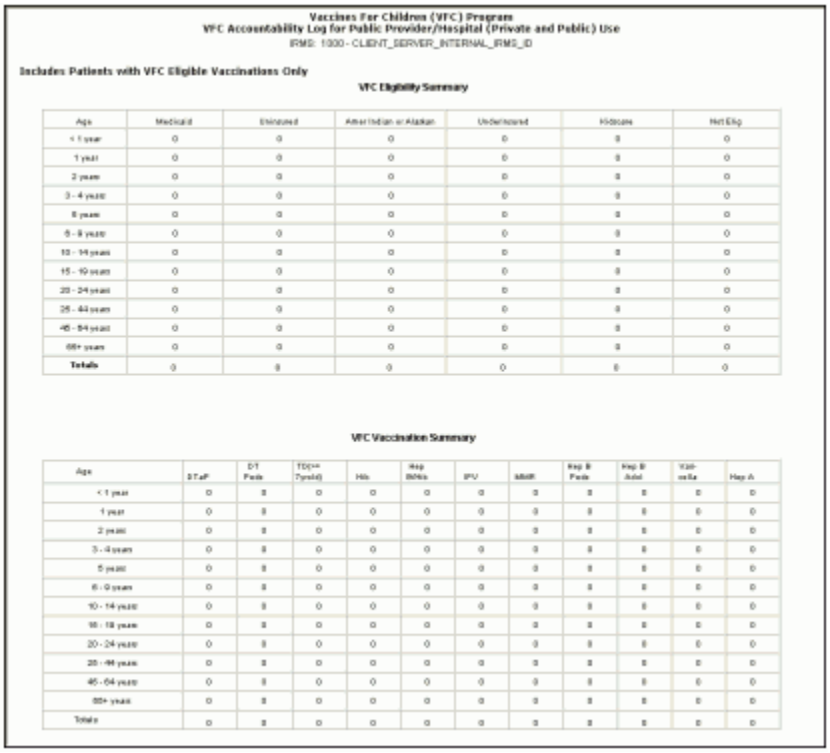
3. Type the **FROM** and **TO** dates for the **VACCINE DATE RANGE**. The checkbox will automatically get selected.

4. Point and click the drop-down arrow to select to the **Facility**. The radio button will automatically get selected

5. Point and click one of the available buttons:

   - **BACK** – to not submit the report and return to the "Reports Menu" list.
   - **RESET** – to erase newly entered/selected criteria and remain on the window to re-enter criteria.
   - **CREATE REPORT** – to display the report output in a new browser window.

Figure 19-80: WY – VFC Accountability Log Report



Vaccines For Children (VFC) Program
VFC Accountability Log for Public Provider/Hospital (Private and Public) Use
IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID

Includes Patients with VFC Eligible Vaccinations Only

VFC Eligibility Summary

Age	Medicaid	Uninsured	American Indian or Alaskan	Underinsured	Holdcare	Not Elig
< 1 year	0	0	0	0	0	0
1 year	0	0	0	0	0	0
2 years	0	0	0	0	0	0
3 - 4 years	0	0	0	0	0	0
5 years	0	0	0	0	0	0
6 - 9 years	0	0	0	0	0	0
10 - 14 years	0	0	0	0	0	0
15 - 19 years	0	0	0	0	0	0
20 - 24 years	0	0	0	0	0	0
25 - 44 years	0	0	0	0	0	0
45 - 64 years	0	0	0	0	0	0
65+ years	0	0	0	0	0	0
Totals	0	0	0	0	0	0

VFC Vaccination Summary

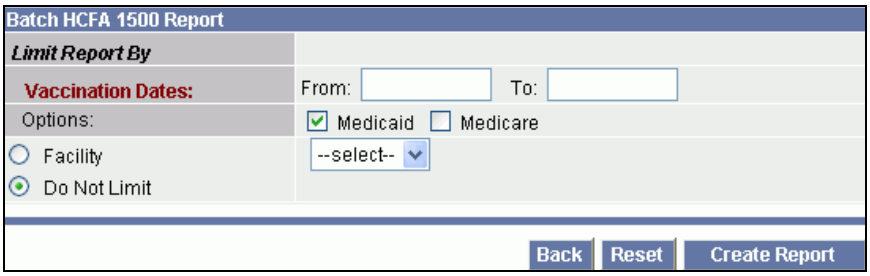
Age	DTaP	DT Peds	TD(>= Tyrsld)	Hib	Hep B(Ped)	IPV	MMR	Hep B Peds	Hep B Adol	Varicella	Hep A
< 1 year	0	0	0	0	0	0	0	0	0	0	0
1 year	0	0	0	0	0	0	0	0	0	0	0
2 years	0	0	0	0	0	0	0	0	0	0	0
3 - 4 years	0	0	0	0	0	0	0	0	0	0	0
5 years	0	0	0	0	0	0	0	0	0	0	0
6 - 9 years	0	0	0	0	0	0	0	0	0	0	0
10 - 14 years	0	0	0	0	0	0	0	0	0	0	0
15 - 19 years	0	0	0	0	0	0	0	0	0	0	0
20 - 24 years	0	0	0	0	0	0	0	0	0	0	0
25 - 44 years	0	0	0	0	0	0	0	0	0	0	0
45 - 64 years	0	0	0	0	0	0	0	0	0	0	0
65+ years	0	0	0	0	0	0	0	0	0	0	0
Totals	0	0	0	0	0	0	0	0	0	0	0

6. Point and click on the **PRINTER ICON** to submit the report to the printer or close the browser and return to the "Reports" window.

BATCH HCFA 1500 REPORT

1. From the **OTHER CATEGORY**, point and click on the **BATCH HCFA 1500 REPORT**. The report's limitation/selection window appears.

Figure 19-81: WY – Batch HCFA 1500 Limitations/Selections



2. Select to limit the report by **Facility** by clicking the drop-down arrow, or choose the **Do Not Limit** radio button.

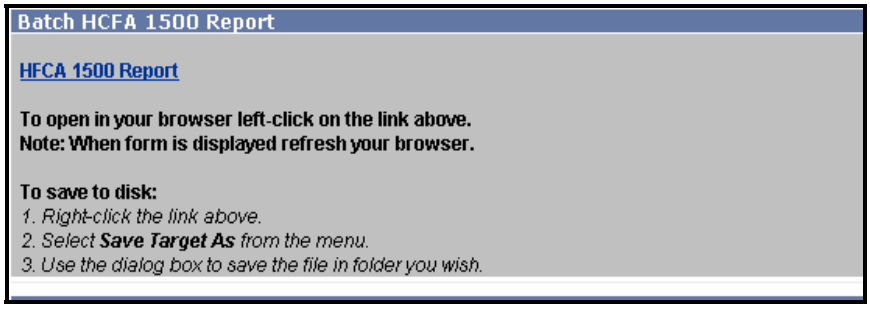
3. Type the **FROM** and **TO** dates for the **VACCINATION DATES RANGE**. The checkbox will automatically get selected.

4. Point and click the checkboxes of the **Medicaid** and **Medicare OPTIONS** if you want to include them, respectively.

5. Point and click one of the available buttons:

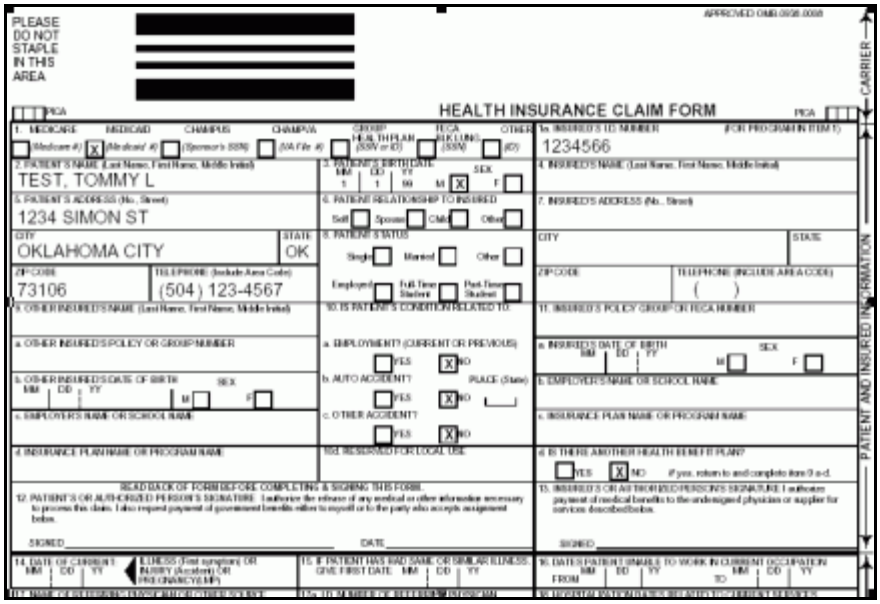
   - **BACK** – to not submit the report and return to the "Reports Menu" list.
   - **RESET** – to erase newly selected/entered criteria and remain on the window to re-enter criteria.
   - **CREATE REPORT** – to display a dialog box.

Figure 19-82: WY – Batch HCFA Dialog Box



6. Point and click on the **HFCA 1500 REPORT** link to display the report (sample shown below).

Figure 19-83: WY – Batch HCFA 1500 Report



PLEASE DO NOT STAPLE IN THIS AREA

HEALTH INSURANCE CLAIM FORM

1. MEDICARE MEDICAID CHAMPUS CHAMPVA GROUP HEALTH PLAN FECA BLK LUNG OTHER

1a. INSURED'S I.D. NUMBER (FOR PROGRAM IN ITEM 1): 1234566

2. PATIENT'S NAME (Last Name, First Name, Middle Initial): TEST, TOMMY L

3. PATIENT'S BIRTH DATE: 1 1 99 M X F

4. INSURED'S NAME (Last Name, First Name, Middle Initial)

5. PATIENT'S ADDRESS (No., Street): 1234 SIMON ST

6. PATIENT RELATIONSHIP TO INSURED: Self Spouse Child Other

7. INSURED'S ADDRESS (No., Street)

CITY: OKLAHOMA CITY STATE: OK

8. PATIENT STATUS: Single Married Other

CITY STATE

ZIP CODE: 73106 TELEPHONE (Include Area Code): (504) 123-4567

Employed Full-Time Student Part-Time Student

ZIP CODE TELEPHONE (INCLUDE AREA CODE) ( )

9. OTHER INSURED'S NAME (Last Name, First Name, Middle Initial)

10. IS PATIENT'S CONDITION RELATED TO:

11. INSURED'S POLICY GROUP OR FECA NUMBER

a. OTHER INSURED'S POLICY OR GROUP NUMBER

a. EMPLOYMENT? (CURRENT OR PREVIOUS) YES X NO

a. INSURED'S DATE OF BIRTH MM DD YY SEX M F

b. OTHER INSURED'S DATE OF BIRTH MM DD YY SEX M F

b. AUTO ACCIDENT? YES X NO PLACE (State)

b. EMPLOYER'S NAME OR SCHOOL NAME

c. EMPLOYER'S NAME OR SCHOOL NAME

c. OTHER ACCIDENT? YES X NO

c. INSURANCE PLAN NAME OR PROGRAM NAME

d. INSURANCE PLAN NAME OR PROGRAM NAME

10d. RESERVED FOR LOCAL USE

d. IS THERE ANOTHER HEALTH BENEFIT PLAN? YES X NO if yes, return to and complete item 9 a-d.

READ BACK OF FORM BEFORE COMPLETING & SIGNING THIS FORM.

12. PATIENT'S OR AUTHORIZED PERSON'S SIGNATURE I authorize the release of any medical or other information necessary to process this claim. I also request payment of government benefits either to myself or to the party who accepts assignment below.

SIGNED DATE

13. INSURED'S OR AUTHORIZED PERSON'S SIGNATURE I authorize payment of medical benefits to the undersigned physician or supplier for services described below.

SIGNED

14. DATE OF CURRENT: MM DD YY ILLNESS (First symptom) OR INJURY (Accident) OR PREGNANCY (LMP)

15. IF PATIENT HAS HAD SAME OR SIMILAR ILLNESS GIVE FIRST DATE MM DD YY

16. DATES PATIENT UNABLE TO WORK IN CURRENT OCCUPATION MM DD YY FROM MM DD YY TO

17. NAME OF REFERRING PHYSICIAN OR OTHER SOURCE

17a. ID. NUMBER OF REFERRING PHYSICIAN

18. HOSPITALIZATION DATES RELATED TO CURRENT SERVICES

CARRIER

PATIENT AND INSURED INFORMATION

7. Point and click on the **PRINTER ICON** to submit the report to the printer or close the browser and return to the "Reports" window.

20 MANAGEMENT REPORTS

The “Management Reports” option will return data from the entire registry, and therefore are not limited to servicing a specific IRMS or Facility. It is very important for you to set limitations on the reports to avoid returning unreasonably large results that require a longer length of time to generate.

Note: If the mapping module is being used, a map can be created in lieu of creating a report; however, the report must be run first.

Some of these reports can take a while to run, so use your judgement when running the report immediately versus using the **SCHEDULER**.

1. From the **REPORTS** menu, point and click on the **MGMT REPORTS** option. The "Management Reports Module" window appears.

Figure 20-1: Management Reports Menu List

2. Determine the method to run the report:

- To **RUN** the report **immediately**, click on the name of the report, referred to as a hyperlink. Continue to the section titled the same as the report.
- To **SCHEDULE** the report, click on the SCHEDULE button. The "Scheduler" window appears. Continue to the section titled, "Using the Scheduler."

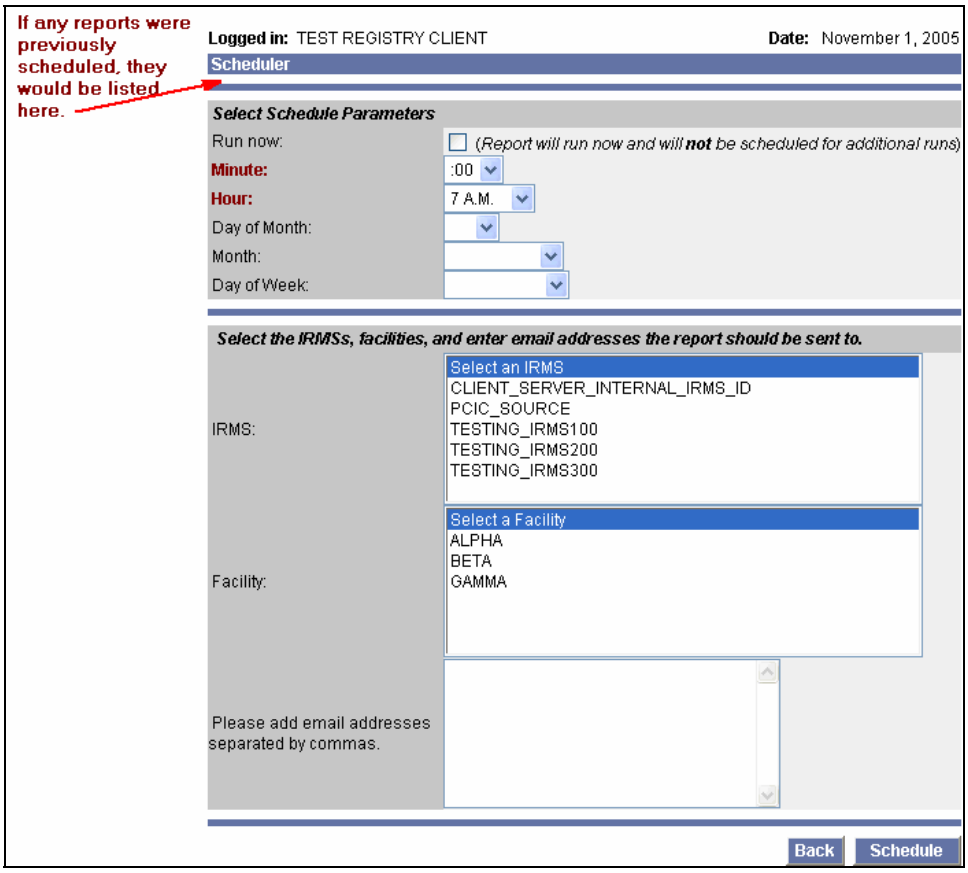
Note: A **SCHEDULE** button does not appear for the "Pocket of Need" report since it includes the various "User Defined Pocket Of Needs" reports; however, there is a **SCHEDULE** action/icon within the "Pocket of Need" report. Click on the report title, select the criteria, and then use the **SCHEDULE** action icon to schedule the various reports.

USING THE SCHEDULER WINDOW

To access and use the "Scheduler" window, perform the following:

1. After clicking on the **SCHEDULE** button, the "Schedule" window appears for the report.

Figure 20-2: Scheduler Window



2. The fields and their descriptions are listed in the table.

Table 20-1: Scheduler Field Descriptions

FIELD	DESCRIPTION
SCHEDULER	
SCHEDULE / NEXT RUN TIME	If there are any reports currently scheduled, they will be listed in this area indicating the report name and the time and day the report will be run the next time.
SELECT SCHEDULE PARAMETERS	
RUN NOW (CHECKBOX)	If this box is checked, the report will immediately run and not be added to the schedule. It will not change the schedule if it currently is on the Schedule.

FIELD	DESCRIPTION
MINUTES	The minutes that can be chosen are in five-minute intervals and will be used with the Hours field to indicate the "kick off" time for the report to run. Click on the drop-down arrow and point and click to make a selection. 00 is the default.
HOURS	The hours are an hour apart and will be used with the Minutes field to indicate the "kick off" time for the report to run. Click on the drop-down arrow and point and click to make a selection. 12 AM is the default.
DAY OF MONTH	Specific day of the month the report should run. If a blank appears, the report will run EVERY DAY. Click on the drop-down arrow and point and click to make a selection. Blank (or every day) is the default.
MONTH	Specific month the report should run. If a blank appears, the report will run EVERY MONTH. Click on the drop-down arrow and point and click to make a selection. BLANK (or every month) is the default.
DAY OF WEEK	Specific day of week the report should run. If a blank appears, the report will run EVERY DAY. Click on the drop-down arrow and point and click to make a selection. BLANK (or every day) is the default).
SELECT IRMSS, FACILITIES, AND ENTER EMAIL ADDRESSES THE REPORT SHOULD BE SENT TO	
IRMS	Permits you to select specific IRMSs. Click on the drop-down arrow and point and click to make a selection.
FACILITY	Permits you to select specific Facilities. Click on the drop-down arrow and point and click to make a selection.
EMAIL ADDRESS(ES)	Permits you to type the email addresses of the person(s) who are to receive the report. If more than one person is going to get the report, separate each email address with a comma.

3. After filling out the necessary fields, click one of the buttons:

- **SCHEDULE** – to add the report to the schedule. The "Management Reports" window re-appears.
- **BACK** – returns to the "Management Reports" window without adding the report to the Schedule.

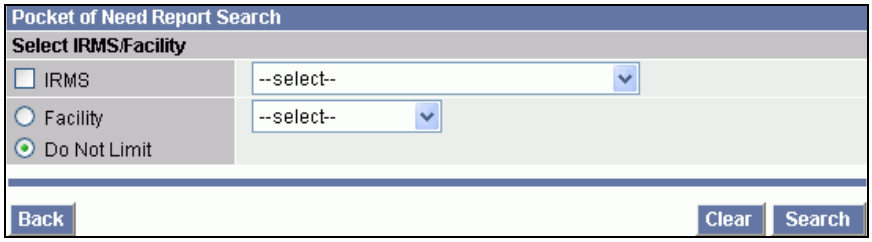
POCKET OF NEED

Note: As of version 3.0P, this report includes the various "User Defined Pocket of Need" reports.

The Pocket of Need Report is used to isolate immunization series within specific age groups and provide a total. Additionally, it will list the total number of births, percentages for those that are "one dose away," "complete," and "under-immunized." The totals can be grouped by the following: District/Region (if your state uses them), County/Parish, Zip Code, Facility, and School.

1. Point and click the name—click on the **POCKET OF NEED** report title. The "Pocket of Need Search" window appears.

Figure 20-3: Pocket of Need Search Criteria



2. The fields and their descriptions are listed in the table:

Table 20-2: Pocket of Need Report Search Criteria Field Descriptions

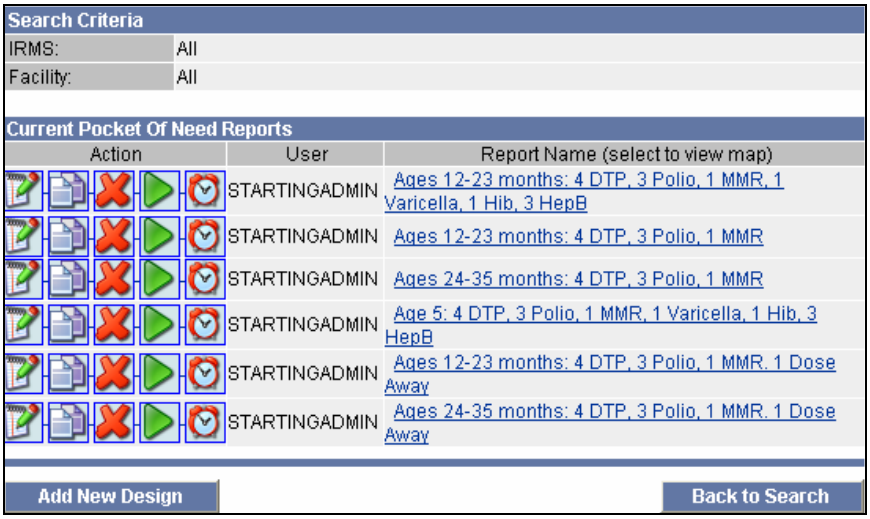
FIELD	DESCRIPTION
IRMS	Click the drop-down menu arrow to view/select a valid IRMS.
FACILITY / DO NOT LIMIT	Click the drop-down menu arrow to view/select a valid Facility or leave the Do Not Limit radio button chosen.

3. Click on of the available buttons:

- **BACK** – to not continue with the report submittal and return to the "Management Reports" list.

- **CLEAR** – to erase any newly selected entries and remain on the window to re-select entries.
- **SEARCH** – to search for the entered report data. The "Search Criteria/Current Pocket of Needs Reports" window appears.

Figure 20-4: Search Criteria/Current Pocket of Need Reports



4. The fields/columns are listed in the table.

Table 20-3: Current Pocket of Need Reports Field/Column Descriptions

FIELD	DESCRIPTION
SEARCH CRITERIA	
IRMS / FACILITY	Displays what you selected from the previous window.
CURRENT POCKET OF NEEDS REPORTS	
ACTION (ICONS) **EDIT REPORT** **COPY REPORT**	The following icons are available to perform specific actions per report: • **EDIT REPORT** – Displays the specific report's criteria/report limitations/selections window. Continue to the specific report's title for instructions. • **COPY REPORT** – Displays an exact copy of the report's criteria/report limitations/selections window so that you can make changes and save the changes with a new name.

FIELD	DESCRIPTION
DELETE REPORT **RUN REPORT** **SCHEDULE REPORT**	• **DELETE REPORT** – will display the report's summary criteria in a new window providing the option to delete the report from the "Current Pocket of Needs" list. • **RUN REPORT** – will submit the report criteria and display the report in a new browser window. • **SCHEDULE REPORT** – will display the "Scheduler" window to set up the report into the Scheduler.
USER	Name of the user that set up the report.
REPORT NAME (SELECT TO VIEW MAP)	Lists each of the available reports that can be displayed in a "map" view. Note: You must RUN the REPORT before a map can be viewed.

Note: You must **RUN** the report before displaying or viewing the map.

5. The available buttons, excluding the "Action Icons" are:

- **BACK TO SEARCH** – returns to the "Pocket of Need Report Search" window.
- **ADD NEW DESIGN** – displays a blank "User Defined Pocket of Need Report" window for you to enter your own report search criteria. Continue to the section titled, "Adding a New Design."

6. Click the **RUN REPORT** icon on the row of the desired report. The report will display in a new browser window.

- You can print the report using the browser's **PRINT** options.

Figure 20-5: Sample – Pocket of Need Report

Immunization Status of Children
12 - 23 Months of Age as of 03/31/ 2003
for the Immunization Series Consisting of
4 DTP, 3 Polio, 1 MMR

Pocket of Need

Report Criteria — Report Date: July 28, 2003

Report Year: 2003
State: LA — View By: District

District	Total Births	Under-immunized for the Immunization Series: As of 3/31 Total	As of 3/31 % of Births	As of 6/30 [1] Total	As of 6/30 [1] % of Births	As of 12/31 [2] Total	As of 12/31 [2] % of Births
UNKNOWN DISTRICT	214	214	100.0				
TOTAL	214	214	100.0				

[1] Results for 6/30 will be available after 8/30.
[2] Results for 12/31 will be available after 2/28.

- Close the Browser window when finished with the report via the **X** in the upper right corner of the window or the **FILE** | **CLOSE** option. The "Current Pocket of Need Reports" window reappears.

7. To view the report's map, click the report's title. The report's title is a hyperlink that will display the "Generated Map Data" window.

Figure 20-6: Generated Map Data

Generated Map Data

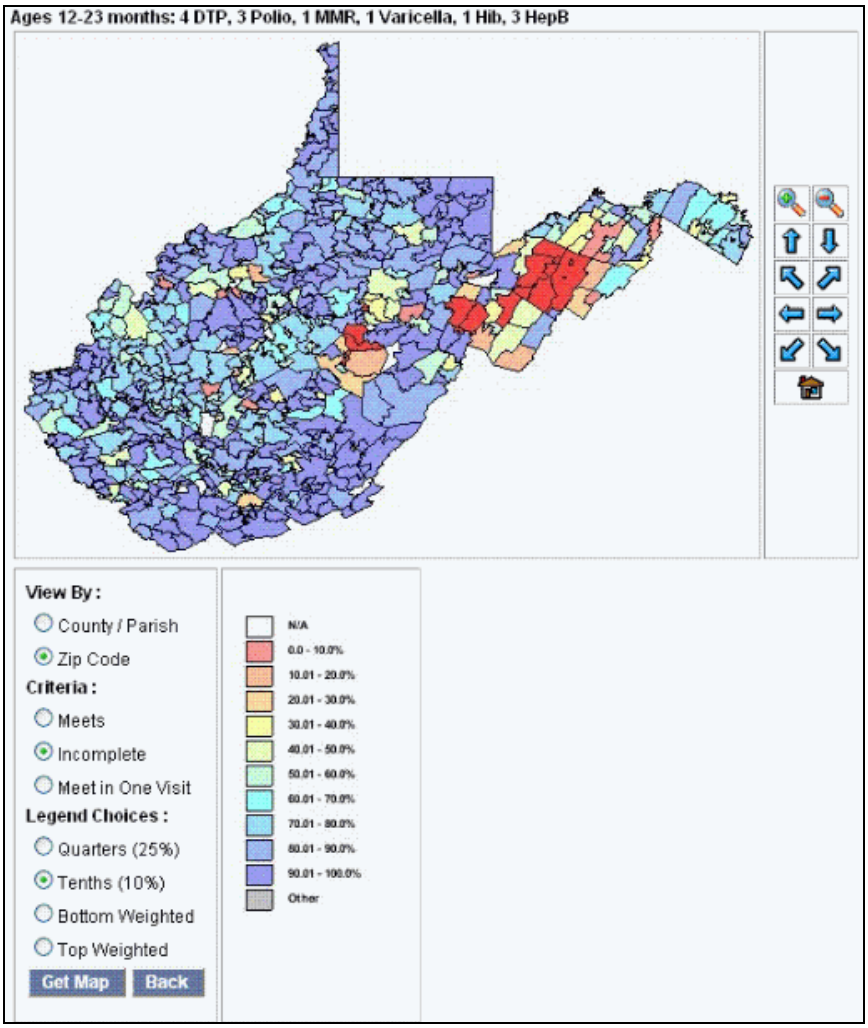
	Report Name	Generation Date
View Map	Ages 12-23 months: 4 DTP, 3 Polio, 1 MMR, 1 Varicella, 1 Hib, 3 HepB	NOV 01, 2005 11:13:44

Back

8. Click one of the available buttons:

- **BACK** – to return to the "Search Criteria/Current Pocket of Needs Reports" window.
- **VIEW MAP** – to display the report criteria via a map.

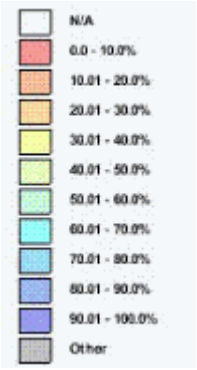
Figure 20-7: Sample—Ages 12-23 months



9. The map options and navigation tools are listed in the table.

Table 20-4: Map Options and Navigation Tools

OPTION	DESCRIPTION
MAP OPTIONS	
VIEW BY:	Rearranges/regroups the report by the options selected. The choices are: • District/Region – if your state uses this field, this option will regroup the map data by district/region. • County/Parish – rearranges the report

OPTION	DESCRIPTION
	data by County or Parish. • Zip Code – rearranges the report data by zip code.
CRITERIA	Rearranges the report data by the criteria chosen: • Meets – the percent of children who have met the number of shots as defined in the report. • Incomplete – the percent of children who do not meet the number of shots in the report (the inverse of Meets). • Meet in One Visit – the percentage of children who can be complete with only a single trip to a vaccinator.
LEGEND CHOICES	Rearranges the report data by the choices selected: • Quarters (25%) – displays groupings of 25 (0-25, 26-50, 51-75, 76-100, etc.) • Tenths (10%) – displays groupings of 10 (0-10, 11-20, 21-30, 31-40, etc.) • Bottom Weighted – displays groupings of 50 for 10 groups. • Top Weighted – displays groupings of 5 for 10 groups.
COLOR LEGEND  	Displays different percentages of the “pockets of need” with a specific color.
GET MAP BUTTON	Redisplays the map using your new map options.

OPTION	DESCRIPTION
BACK BUTTON	Returns to the “Generated Map Data” window without redisplaying the map.
MAP NAVIGATION TOOLS	
ZOOM IN	The zoom in tool decreases the view of the map to a more precise location.
ZOOM OUT	The zoom out tool increases the view of the map to a broader location.
UP	Repositions the map’s view to view the upper portion of the map.
DOWN	Repositions the map’s view to view the lower portion of the map.
LEFT-UPPER	Repositions the map’s view to view the left upper corner.
RIGHT-UPPER	Repositions the map’s view to view the right upper corner.
LEFT-MIDDLE	Repositions the map’s view to view the left middle portion of the map.
RIGHT-MIDDLE	Repositions the map’s view to view the right middle portion of the map.
LEFT-LOWER	Repositions the map’s view to view the left lower corner.
RIGHT-LOWER	Repositions the map’s view to view the right lower corner.
HOME	Repositions the map’s view to the original full extent view.

10. Click one of the available buttons:

- **RESET** – to erase any "newly" made choices.
- **CREATE MAP** – Invokes the Enhanced Mapping Module, if in use, and creates the map.
- **CREATE REPORT** – Displays the report in an additional browser window providing the option to print. Assuming you clicked **CREATE REPORT,** the report displays similar to the one shown.

ADDING A NEW DESIGN

The "Add New Design" button appears on the "Search Criteria/Current Pocket of Need Reports" window. It is used to define your own custom report.

1. From the "Search Criteria/Current Pocket of Need Reports" window, click the **ADD NEW DESIGN** button. The "User Defined Pocket of Need Report" (blank) criteria window appears.

Figure 20-8: User Defined Pocket of Need Report Criteria

User Defined Pocket of Need Report

Specify Report Name

Report Name

Specify Age Range

Age Range 0 Months to 11 Months

Age as of Date *(Todays date if left blank)*

Select Vaccines and Number of Shots

- DTaP/DT/Td Shots
- HEP-A Shots
- HEP-B 2 DOSE Shots
- HEP-B 3 DOSE Shots
- HIB Shots
- MMR Shots
- PNEUMO (PCV7) Shots
- POLIO Shots
- VARICELLA Shots
- ANY VACCINE Shots

Limit Report By

Patient Status: Active Only / Inactive Only / All

- Patient Race: White, Black or African American, Asian, American Indian or Alaska Native
- District/Region
- County/Parish: --select--
- ZIP Code
- IRMS: --select--
- Facility: --select--
- Do Not Limit
- School: Click to select

View By

- District/Region
- County/Parish
- ZIP Code
- Facility
- School

Display Report Columns

- One Dose Away
- Under Immunized
- Meets

Back | Reset | Save Report

2. The fields and their descriptions are listed in the table.

Table 20-5: User Defined Pocket of Need Field Descriptions

FIELD	DESCRIPTION
SPECIFY REPORT NAME	
REPORT NAME	In the field provided, type the name of the report.
SPECIFY AGE RANGE	
AGE RANGE	Type the "FROM" and "TO" dates in the fields provided.
AGE AS OF DATE (TODAYS DATE IF LEFT BLANK	Type the date for the age to date. This date will default to today's date if left blank.
SELECT VACCINES AND NUMBER OF SHOTS	
SHOTS	Type the number of shots in the SHOTS column. The checkbox for the vaccine will automatically be selected/checked.
LIMIT REPORT BY	
PATIENT STATUS	To limit the report by Patient Status, click one of the radio buttons: • Active Only – Displays the report for active patients only. • Inactive Only – Displays the report for Inactive patients only. • All – Displays the report for All patients.
PATIENT RACE	To limit the report by Patient Race, click all that apply. Click the up//down scroll bars to view all the races. You may type the first letter of the word and the highlighter will position on the first occurrence. To locate the next occurrence, type the letter again. To select: • A **sequential list**, highlight the first option of the list, click the left mouse button, move the cursor to the last option, hold down the SHIFT key, and click the left mouse button again. • A **list not in sequence**, highlight the first option, click the left mouse button, move the cursor to the next option, hold down the CTRL key, and click the left mouse button again.

FIELD	DESCRIPTION
DISTRICT/REGION	To limit the report by District or Region, type it in the field provided. The checkbox will automatically be selected.
COUNTY/PARISH	To limit the report by County or Parish, click the drop-down menu arrow to view/select a valid choice. The checkbox will automatically be selected.
ZIP CODE	To limit the report by Zip Code, type it in the field provided. The checkbox will automatically be selected.
IRMS	To limit the report by IRMS, click the drop-down menu arrow to view/select a valid choice. The checkbox will automatically be selected.
FACILITY / DO NOT LIMIT	To limit the report by Facility, click the drop-down menu arrow to view/select a valid choice. The radio button will automatically be selected. If you do not desire to limit the report by facility, leave the Do Not Limit radio button selected.
SCHOOL	To limit the report by School, click the "Click to select" hyperlink. The "Select School" window appears. Run a search to locate the desired school. Schools can be PRIVATE, PUBLIC, or BOTH. Type the name of the school or what you remember of the name, click on the BEGINS WITH or CONTAINS radio button, and then click the SEARCH button. The results will appear at the bottom of the window. Click the SELECT button to the left of your choice. After you make a selection, you will return to the "User Defined Pocket of Need Report" window with the school name imbedded into the field.
VIEW BY	
DISTRICT/REGION **COUNTY/PARISH** **ZIP CODE** **FACILITY** **SCHOOL**	The "View By" option will group the report data for the option chosen. Click one of the radio buttons to make a selection.
DISPLAY REPORT COLUMNS	
ONE DOSE AWAY **UNDER**	Displays the reports data for the column(s) chosen. Patients that are one dose away, under-

FIELD	DESCRIPTION
IMMUNIZED **MEETS**	immunized, or meets the requirement.

3. Click the desired options for the report by typing/select data for the fields.

4. Click one of the available buttons:

- **RESET** – to erase any "newly" made choices and remain on the same window.
- **BACK** – to return to the "Search Criteria/Current Pocket of Need Reports" window without saving the report.
- **SAVE REPORT** – Saves the report with the name you entered and returns to the "Search Criteria/Current Pocket of Need Reports" window with the newly saved report.

Note: The report will display "Undefined" when shots were given to patients without a county being defined for the patient.

TOTAL PATIENTS BY AGE GROUP

This report immediately displays and reveals one year's worth of data in quarterly columns containing total patients, percentage, and the average number of vaccinations per age group.

1. Click the name of the report to immediately run the report or click the **SCHEDULE** button.

- If you are scheduling the report, continue to the section titled, "Using the Scheduler."
- If you are running the report, the report immediately appears in a separate browser window.

Figure 20-9: Total Patients by Age Group - Sample

Total Patients by Age Group

Report Criteria — Report Date: July 28, 2003

Report Year: 2003

County	Age	12/31/2002 Total Patients	%	Avg Vacc	03/31/2003 Total Patients	%	Avg Vacc	06/30/2003 Total Patients	%	Avg Vacc	09/30/2003 Total Patients	%	Avg Vacc	12/31/2003 Total Patients	%	Avg Vacc
TOTAL		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
GRAND TOTAL		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

TOTAL PATIENTS BY PROVIDER

This report is used to list a total number of quarterly patients per provider, and be categorized by County/Parish.

1. Click the name of the report to immediately run the report or click the **SCHEDULE** button.
   - If you are scheduling the report, continue to the section titled, "Using the Scheduler."
   - If you are running the report, the report's limitations/selections window appears.

Figure 20-10: Total Patients by Provider

2. The fields and their descriptions are listed in the table:

Table 20-6: Total Patients by Provider Field Descriptions

FIELD	DESCRIPTION
CALENDAR QUARTER	Click the drop-down menu arrow to view/select a valid choice.
COUNTY/PARISH	Click the drop-down menu arrow to view/select a valid County or Parish.

3. Click one of the available buttons:
   - **RESET** – to erase any "newly" made choices and remain on the window.

- **BACK** – returns to the "Management Reports" list of reports without submitting the report.
- **CREATE REPORT** – Displays the report in an additional browser window providing the option to print.

Figure 20-11: Sample Report Not available

General Loading and Deduplication Statistics

This report immediately displays and lists loading information and statistics on the De-duplication process.

1. Click the name of the report to immediately run the report or click the **SCHEDULE** button.
   - If you are scheduling the report, continue to the section titled, "Using the Scheduler."
   - If you are running the report, the report immediately appears in a separate browser window.

Figure 20-12: General Loading & De-Duplication Statistics Report

General Loading and Deduplication Statistics

Report Criteria **Report Date:** July 28, 2003

Report Year: 2003

Statistic	12/31/2002 (YTD)	03/31/2003	06/30/2003	09/30/2003	12/31/2003
Average patients added per day	0	0	95	0	0
Average vaccinations added per day	0	0	2	0	0
Average time to load vaccination record	0	0	224	296	0
Average gateway queries per day	0	0	0	0	0
Average successful queries per day[1]	0	0	0	0	0
Duplicate patient rate	0	0	1	1	1
Average records merged automatically per day	0	0	0	0	0
Average records merged manually per day	0	0	0	0	0

[1] Security module must be enabled to calculate number of queries.

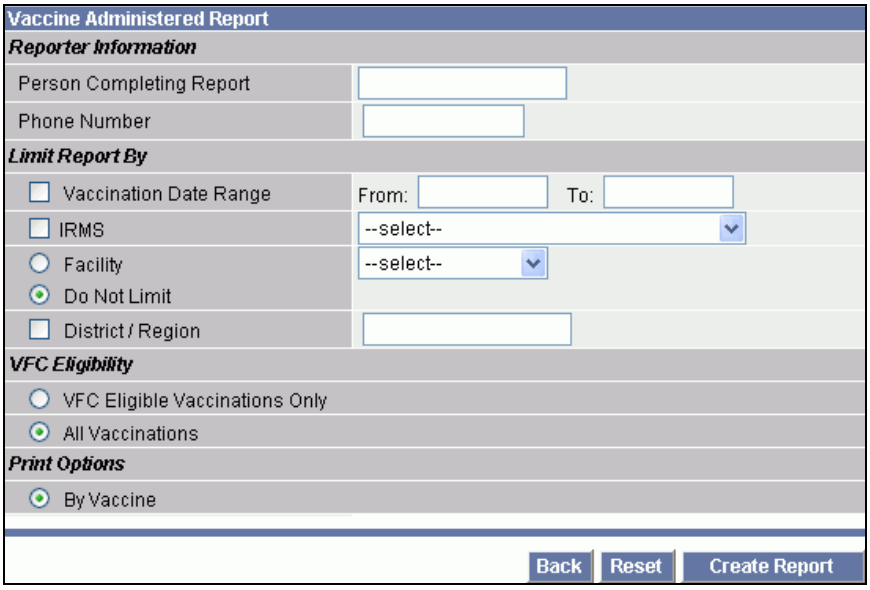
Doses Administered by Antigen and Age

This report lists the total number of doses administered by antigen name and age.

1. Click the name of the report to immediately run the report or click the **SCHEDULE** button.
   - If you are scheduling the report, continue to the section titled, "Using the Scheduler."

- If you are running the report, the report's limitations/selections window appears.

Figure 20-13: Vaccine Administered Report Limitations



2. The fields and their descriptions are listed in the table:

Table 20-7: Vaccine Administered Report Field Descriptions

FIELD	DESCRIPTION
REPORTER INFORMATION	
PERSON COMPLETING REPORT	Type the name of the person submitting this report.
PHONE NUMBER	Type the phone number for the person submitting this report.
LIMIT REPORT BY	
VACCINATION DATE RANGE	To limit the report by vaccination date range, type the "FROM" and "TO" dates. The checkbox will automatically be selected.
IRMS / DO NOT LIMIT	To limit the report by IRMS, click the drop-down menu arrow to view/select a valid IRMS. The radio button will automatically be selected. To not limit the report by IRMS, leave the Do Not Limit radio button chosen.
FACILITY / DO NOT	To limit the report by FACILITY, click the drop-down menu arrow to view/select a valid

FIELD	DESCRIPTION
LIMIT	Facility. The radio button will automatically be selected. To not limit the report by Facility, leave the Do Not Limit radio button chosen
DISTRICT/REGION	To limit the report by District or Region, type the name of the District/Region in the field provided. The checkbox will automatically be selected.
VFC ELIGIBILITY	
VFC ELIGIBLE VACCINATIONS ONLY / ALL VACCINATIONS	To limit the report by VFC Eligible Vaccinations, click the radio button; otherwise, leave the ALL VACCINATIONS radio button chosen.
PRINT OPTIONS	
BY VACCINE	Indicates the report will be grouped in order of the vaccine name. This is a default setting and cannot be changed.

3. Type/select the data for the desired fields.

4. Click on one of the available buttons:

- **RESET** – to erase any "newly" made choices and remain on the same window.
- **BACK** – to return to the “Management Reports” list window and not submit the report.
- **CREATE REPORT** – Displays the report in an new browser window providing the option to print. Assuming you clicked **CREATE REPORT**, the report displays similar to the one shown.

Figure 20-14: Vaccine Administered Report Sample

Vaccine Administered Report
Vaccination Date Range: 01/01/2000 - 01/01/2003

Facility: All
Provider Number:
Date Submitted: July 28, 2003
Person completing report: Sherri Smith
Phone number: (602)241-1502

( ) Health Department
( ) Non-Health Department

		Months					Years									
Vaccine	Dose #	< 3	3-5	6-7	8-11	12-23	2-3	4-6	7-11	12-13	14-18	19-24	25-44	45-64	65+	Total
MMR																
	1	0	0	0	0	1	0	0	0	0	0	0	0	0	0	1
	Total	0	0	0	0	1	0	0	0	0	0	0	0	0	0	1
IPV																
	1	0	1	1	0	0	0	0	0	0	0	0	0	0	0	2
	Total	0	1	1	0	0	0	0	0	0	0	0	0	0	0	2
DTaP																
	1	0	1	1	1	2	0	0	1	0	0	0	0	1	0	7
	Total	0	1	1	1	2	0	0	1	0	0	0	0	1	0	7
Hep B/Hib																
	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	1
	Total	1	0	0	0	0	0	0	0	0	0	0	0	0	0	1
Influenza Nasal Spray																
	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	1
	Total	1	0	0	0	0	0	0	0	0	0	0	0	0	0	1

BIRTH STATISTICS

The Birth Statistics report lists total of all births, total with HepB, percentage with HepB, Average Load Time, and total births year-to-date for a specified quarter and year. If you are using the Mapping Module, you may choose to create a map in lieu of a report.

1. Click the name of the report to immediately run the report or click the **SCHEDULE** button.
   - If you are scheduling the report, continue to the section titled, "Using the Scheduler."
   - If you are running the report, the report's limitations/selections window appears.

Figure 20-15: Birth Statistics Limitations

2. Point and click the drop-down arrow to view a list of **QUARTER/YEAR** choices.
3. Click on one of the available buttons:

- **RESET** – to erase any "newly" made choices.
- **BACK** – to return to the “Management Reports” list and not submit the report.
- **CREATE REPORT** – Displays the report in an additional browser window providing the option to print. Assuming you clicked **CREATE REPORT**, the report displays similar to the one shown.

Figure 20-16: Birth Statistics - Sample

Birth Statistics

Report Criteria **Report Date:** July 28, 2003

Report Year: 2003 **Calendar Quarter:** 1

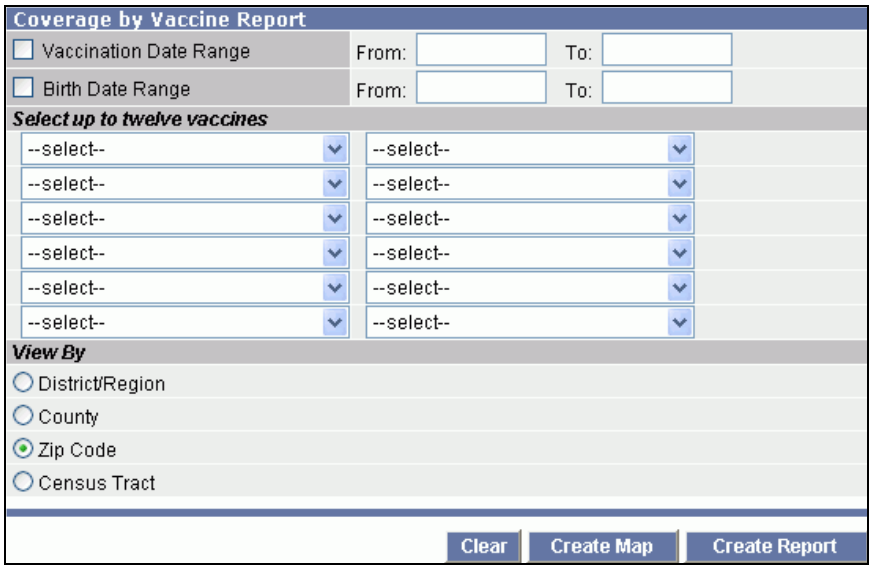
County	Total Births this Quarter	Total with HepB	% with HepB	Average Load Time (Days)	Total Births Year-to-Date
ACADIA	0	0	0	0	0
ALLEN	0	0	0	0	0
ASCENSION	0	0	0	0	0
ASSUMPTION	0	0	0	0	0
AVOYELLES	0	0	0	0	0
BEAUREGARD	0	0	0	0	0
BIENVILLE	0	0	0	0	0
BOSSIER	0	0	0	0	0
CADDO	0	0	0	0	0
CALCASIEU	0	0	0	0	0
CALDWELL	0	0	0	0	0
CAMERON	0	0	0	0	0
CATAHOULA	0	0	0	0	0
CLAIBORNE	0	0	0	0	0
CONCORDIA	0	0	0	0	0
DE SOTO	0	0	0	0	0
EAST BATON ROUGE	0	0	0	0	0
EAST CARROLL	0	0	0	0	0

COVERAGE BY VACCINE

This report is used to view the vaccines that were used within a specific date and/or for a specific birth date.

1. Click the name of the report to immediately run the report or click the **SCHEDULE** button.
   - If you are scheduling the report, continue to the section titled, “Using the Scheduler.”
   - If you are running the report, the report’s limitations/selections window appears.

Figure 20-17: Coverage by Vaccine Limitations



2. The fields and their descriptions are listed in the table.

Table 20-8: Coverage by Vaccine Report Field Descriptions

FIELD	DESCRIPTION
VACCINATION DATE RANGE	To limit the report by vaccination date range, type the “From” and “To” dates in the fields provided.
BIRTH DATE RANGE	To limit the report by birth date range, type the “From” and “To” dates in the fields provided.
SELECT UP TO TWELVE VACCINES	
SELECT	Click the drop-down menu arrow to view/select a valid choice. You may choose up to twelve vaccines to include on the report.
VIEW BY	
DISTRICT/REGION **COUNTY** **ZIP CODE** **CENSUS TRACT**	This option arranges the report data in order of the “View By” type chosen. Click one of the radio buttons.

3. Type/select data for the desired fields.

4. Click one of the available buttons:

- **CLEAR** – to erase any newly selected items and remain on the window to make new selections.
- **BACK** – to return to the "Management Reports" list without submitting the report.
- **CREATE REPORT** – to display the report in a new browser window providing the option to print.

Figure 20-18: Coverage by Vaccine Report - Sample

Coverage by Vaccine Report

Report Criteria **Report Date:** July 27, 2004

Vaccination Date Range: 01/01/2000 to 01/01/2004
Birth Date Range: All
Included Vaccines: DTaP
View By: Zip Code

Zip Code	Total Vaccinations
1082	3
11105	4
11720	1
12345	1
13088	3
13208	4
13309	3
13905	1
15090	2
15146	2
15301	3
15401	2
15463	2

21 HEDIS MENU

The Health Plan Employer Data and Information Set (HEDIS) module provides the capability to accept a patient listing to be matched to existing registry records. This data is only a **sampling** of patients and will not be imported into the registry. Based on the sample, a vaccination **export** can be created for the matched patients and their vaccinations.

Additionally, a report can be run to view the patients where no match was found.

The menu options available from **HEDIS** are:

- Load Sample
- Export Results

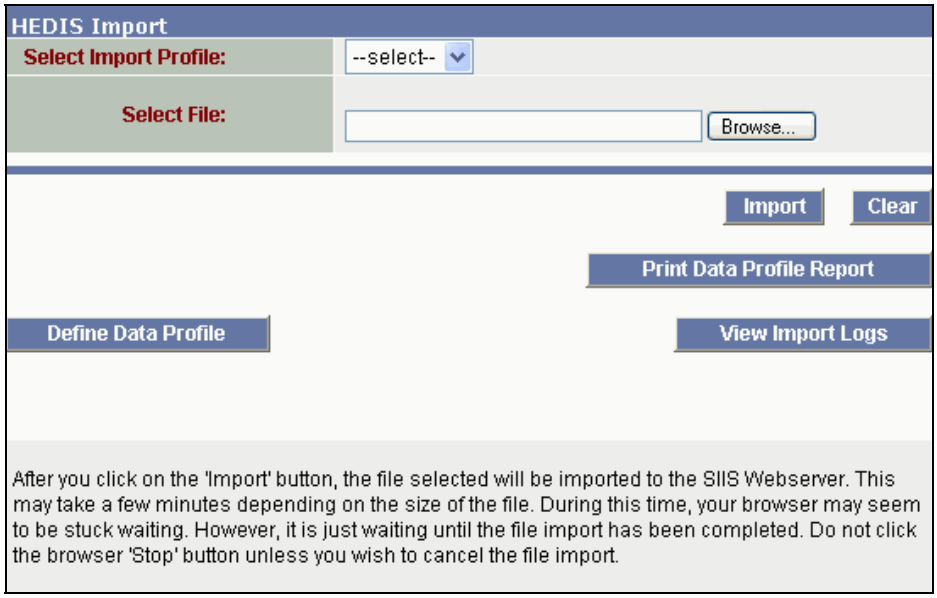
Depending on your use of the **HEDIS** module, your access permissions may differ. There are permissions to create data profiles and to perform the assessment.

LOAD SAMPLE

To load a sample, perform the following:

1. From the **HEDIS** menu, point and click on the **Load Sample** option. The "HEDIS Import" window appears.

Figure 21-1: HEDIS Import



The following can be performed while on the "HEDIS Import" window:

- Define a New Data Profile
- Import an Existing Profile
- Define a New Data Profile
- Edit an Existing Data Profile
- Print a Data Profile Report
- View Import Logs (for errors)

Note: The maximum Import file size is 100 MB.

2. Determine the action you want to perform and continue to the respective section.

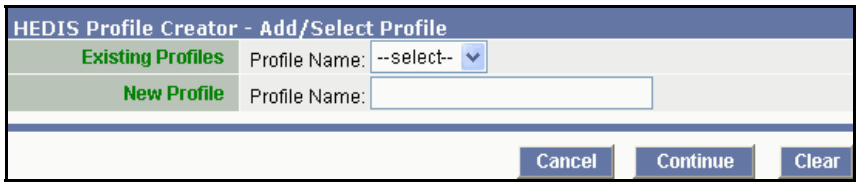
DEFINE A NEW DATA PROFILE / EDIT EXISTING PROFILE

This button is used when you want to create a new data profile or edit an existing profile.

A profile must exist before an Import can occur.

1. From the "HEDIS Import" window, click the **DEFINE DATA PROFILE** button. The "HEDIS Profile Creator – Add/Select Profile" window appears.

Figure 21-2: HEDIS Profile Creator – Add/Select Profile

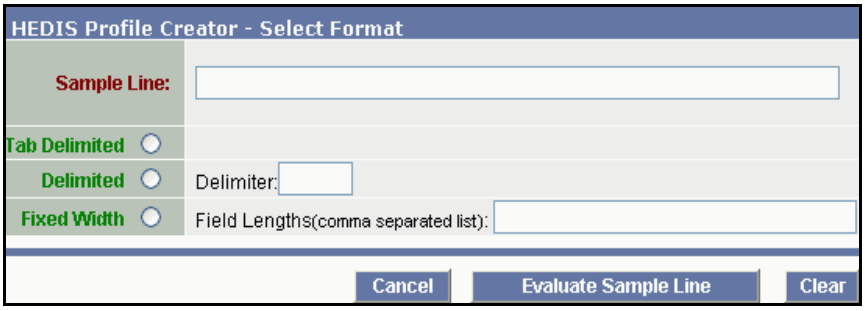


2. If you are creating a new profile, type the name of the new profile in the **NEW PROFILE NAME** field and continue to the next step; otherwise if editing an existing profile, click the drop-down arrow in the **EXISTING PROFILES** field and select the profile you want to edit.

3. Click one of the available buttons:

   - **CANCEL** – to NOT save any selections or entries and return to the "HEDIS Import" window.
   - **CLEAR** – to erase the selections or entries and remain on the window to re-enter them.
   - **CONTINUE** – to access the next window to choose the file format selection. The "HEDIS Profile Creator – Select Format" window appears.

Figure 21-3: HEDIS Profile Creator – Select Format



4. Indicate the file type by clicking the radio button for **TAB DELIMITED**, **DELIMITED**, or **FIXED WIDTH**.

- If choosing **DELIMITED**, indicate the symbol that will be used to separate the text in the **DELIMITER** field. For example, the pipe (|) symbol.
- If choosing **FIXED WIDTH**, list each field's length and separate each field length with a comma. Do not put a comma after the last one.

5. Type an example of the data in the **SAMPLE LINE** field. For example, type a sample line of:

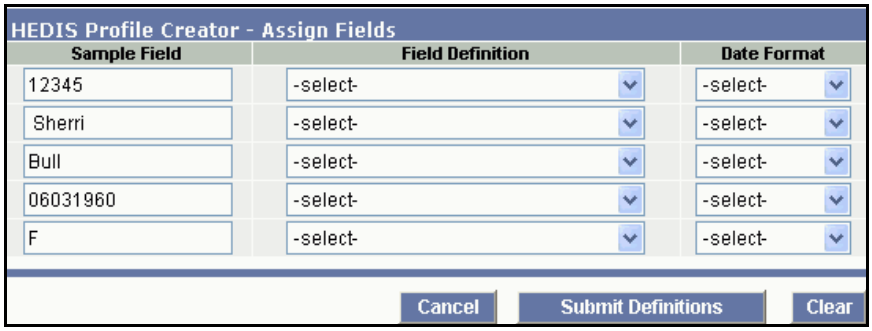
```
12345|Sherri|Bull|06031960|F
```

Note: The sample file should contain as much identifying information as possible to ensure the chances of finding a match; i.e., include family and/or address information such as Guardian First Name.

6. Click on one of the available buttons:

- **CANCEL** – to NOT save any entries and return to the "HEDIS Profile Creator – Add/Select Profile" window.
- **CLEAR** – to erase the data and re-enter new data.
- **EVALUATE SAMPLE LINE** – to continue and access the "HEDIS Profile Creator –Assign Fields" window.

Figure 21-4: HEDIS Profile Creator – Assign Fields

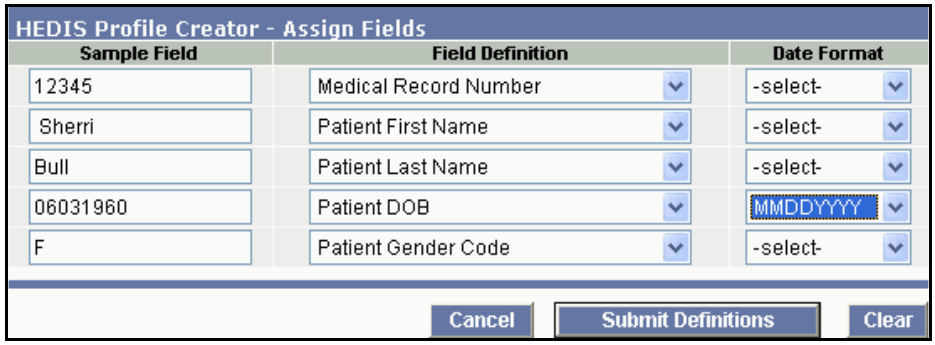


Observe the three columns on the window: Sample Field, Field Definition, and Date Format. The Date Format column is only used to define formats of all dates.

7. View the **SAMPLE FIELD** column and click each drop-down arrow in the **FIELD DEFINITION** column to select each field's definition.

- If any dates are listed, select the format of the field by clicking on the drop-down arrow in the **DATE FORMAT**.
- Your window should resemble the one shown below.

Figure 21-5: HEDIS Profile Creator – Assign Fields Example

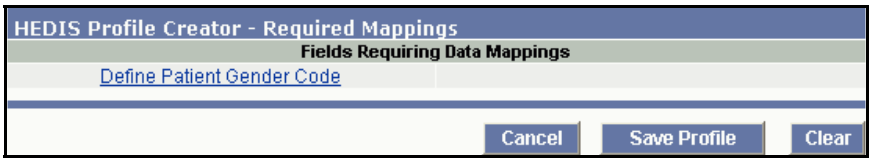


8. Click one of the available buttons:

- **CANCEL** – to return to the "HEDIS Import" window.
- **CLEAR** – to erase and remain on the window to re-enter new field/date definitions.

- **SUBMIT DEFINITIONS** – to save the profile and exit to either the initial "HEDIS Import" window (indicating the profile was saved successfully) or the "HEDIS Profile Creator – Required Mappings" window.

Note: You are finished creating a profile when you see the "HEDIS Import" window. If you see the "HEDIS Profile Creator – Required Mappings" window (shown below), continue to the next section.



REQUIRED MAPPINGS

When fields listed in the **FIELD DEFINITION** area require mapping, they will be listed in the "HEDIS Profile Creator – Required Mappings" window.

The term "mapping" means the translation of the import file codes to the codes used in the registry.

Figure 21-6: HEDIS Profile Creator Fields Requiring Data Mappings

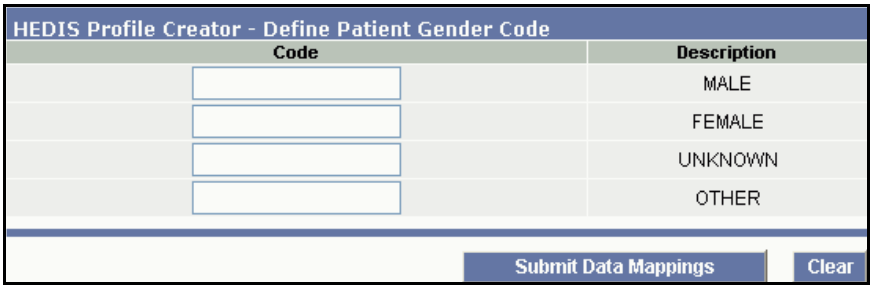
Examples of when you will need to "map" the fields are: Patient Gender Code, Patient Ethnicity Code, Vaccine Code, Manufacturer Code, County Code, etc.

1. To continue with the profile, continue to the next step; otherwise, click on one of the available buttons (versus the hyperlink):

- **CANCEL** – to return to the "HEDIS Import" window.
- **CLEAR** – remains on the window.
- **SAVE PROFILE** – saves the profile and returns to the "HEDIS Import" window.

2. From the "HEDIS Profile Creator – Required Mappings" window, click the hyperlink. The "HEDIS Profile Creator – Define Field Code" window appears.

Figure 21-7: HEDIS Profile Creator – Define Patient Gender Code



3. In the **CODE** column, type the code to coincide with the **DESCRIPTION** column. These are the codes within the import file. For example the codes could be M for Male, F for Female, U for Unknown, O for Other.

4. Click on one of the available buttons:

- **CLEAR** – to erase entries and remain on the window to re-enter them.
- **SUBMIT DATA MAPPINGS** – to save entries and return to the "HEDIS Profile Creator – Required Mappings" window.

5. Click one of the available buttons:

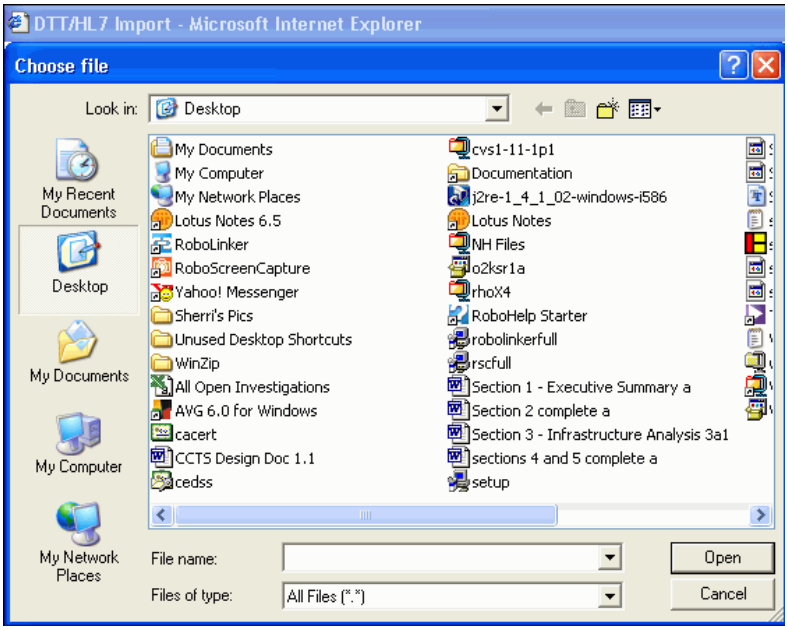
- **CANCEL** – to not save and return to the "HEDIS "
- **CLEAR** – to erase selections and remain on the window.
- **SAVE PROFILE** – to save the profile. The "HEDIS Import" window appears (at the top of the window) with a message "Profile saved successfully."

IMPORT AN EXISTING PROFILE

This option assumes a data profile has already been defined and you are ready to upload the file to the State.

1. From the "HEDIS Import" window, click the drop-down arrow in the **SELECT IMPORT PROFILE** field and select the file.
2. In the **SELECT FILE** field, click the **BROWSE** button and select the file to import. The "Choose File" window appears.

Figure 21-8: Choose Import File Dialog Box



3. Point and double-click the file name to select it or click the **OPEN** button. The "Import" window reappears with the "chosen" file name.
4. Point and click on one of the available buttons:
   - **IMPORT** – to send the file to be processed by the State Registry staff. The status bar at the bottom of the window will appear as it is being processed, and then a message appears at the top of the "HEDIS Import" window stating, "The file (actual filename) was imported successfully."

Note: This may take some time to process depending on the size of the file. The browser may time out when processing lengthy imports. Periodically, check the "Import Log" to ensure the import processed properly.

- **CLEAR** – to erase data from the fields in order to re-enter the criteria.

PRINT DATA PROFILE REPORT

This option will print an existing data profile report.

1. From the "HEDIS Import" window, click the drop-down arrow in the **SELECT IMPORT PROFILE** field to select a data profile to print.
2. Click the **PRINT DATA PROFILE REPORT** button to display the report (shown below) in a new browser window providing the option to print the report to the local printer. If you do not want to print the report, close the browser window to return to the "HEDIS Import" window.

Figure 21-9: Data Profile Report

Hedis Sample

IRMS: 1000
Creation Date: 03/31/2004 10:38:02
Last Updated: 03/31/2004 10:38:02

Format: Delimited
Delimiter: |
Field order and mappings:

- Medical Record Number
- Patient First Name
- Patient Middle Name
- Patient Last Name
- Patient DOB
  - Date Format: MM/DD/YYYY
- Patient Mailing Address1
- Patient Address City
- Patient Address State Code
- Patient Address Zip Code

VIEW IMPORT LOGS (FOR ERRORS)

This option is used to view previously submitted imports and to see what the errors are so they can be corrected and then be imported again.

1. From the "HEDIS Import" window, click the **VIEW IMPORT LOGS** button. The "HEDIS Import Logs" window appears.

Figure 21-10: HEDIS Import Logs

HEDIS Import Logs

View Errors	Profile Name	Date	Total Records	Errors
-->	HEDIS SAMPLE	2004-03-31 11:05	202	0

Cancel

2. Perform one of the following bulleted items:

- Click the **CANCEL** button– to not view the errors and return to the "HEDIS Import" window.
- Locate the file whose errors you want to view by clicking on the **SELECT** button (under the "View Errors" column). The "HEDIS Import Errors" window appears.

Note: If the total number of **errors** exceeds 100, you may want to import a smaller file by copying/pasting a subset of the larger "original" file and view its errors. When the number of errors is large, the browser can experience a "memory limitation" and you will not be able to view the errors.

Figure 21-11: HEDIS Import Errors

HEDIS Import Errors

Create Error Report

Line Number	Details	Errors
1	view details	Patient Last Name is required for a Patient record. Patient Birth Date is required for a Patient record.
2	view details	Patient Last Name is required for a Patient record. Patient Birth Date is required for a Patient record.
3	view details	Patient Last Name is required for a Patient record.

The line number on which the error occurred is shown along with a "**View Details**" hyperlink and an error description.

3. Click an available button or hyperlink:

- **CANCEL** – to return to the "HEDIS Import Logs" list window.
- **CREATE ERROR REPORT** – to display a report of all the errors in a new browser window providing the option to print the report (sample shown below).

Figure 21-12: HEDIS Error Report

HEDIS Import Error Report

Profile: SAMPLE THREE
Import Date: 2004-03-31 11:23
Total Records: 202
Total Error Records: 202

Medical Record Number	Patient First Name	Patient DOB	Errors
TEST1001	GEORGE		- Patient Last Name is required for a Patient record. - Patient Birth Date is required for a Patient record.
TEST1002	JANE		- Patient Last Name is required for a Patient record. - Patient Birth Date is required for a Patient record.
TEST1003	MARIA	ANN	- Patient Last Name is required for a Patient record.
TEST1004	JOAN	ANN	- Patient Last Name is required for a Patient record.

- **VIEW DETAILS** (hyperlink) – to display the "DTT Import Error Detail" window (sample shown below).

Figure 21-13: HEDIS Import Error Detail – Line 1

HEDIS Import Error Detail - Line 1

Errors Found

- Patient Last Name is required for a Patient record.
- Patient Birth Date is required for a Patient record.

Back to Error List

Field Definition	Date Format	Field Value
Medical Record Number		TEST1001
Patient First Name		GEORGE
Patient DOB		

Back to Error List

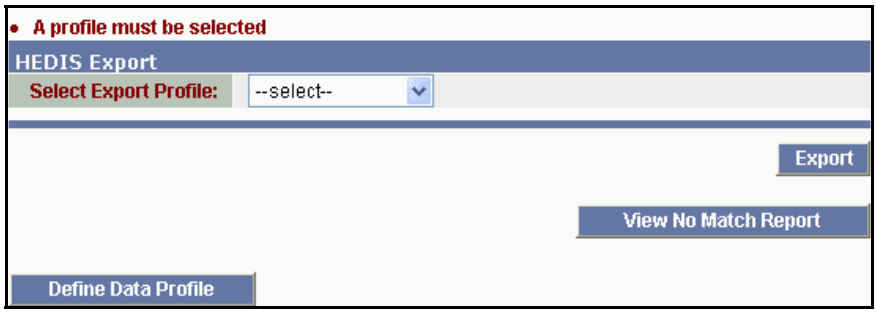
a) Click the **BACK TO ERROR LIST** to return to the "HEDIS Import Errors List" window.

EXPORT RESULTS

To export results, perform the following:

1. From the **HEDIS** menu, point and click on the **Export Results** option. The "Export Results" window appears.

Figure 21-14: HEDIS Export

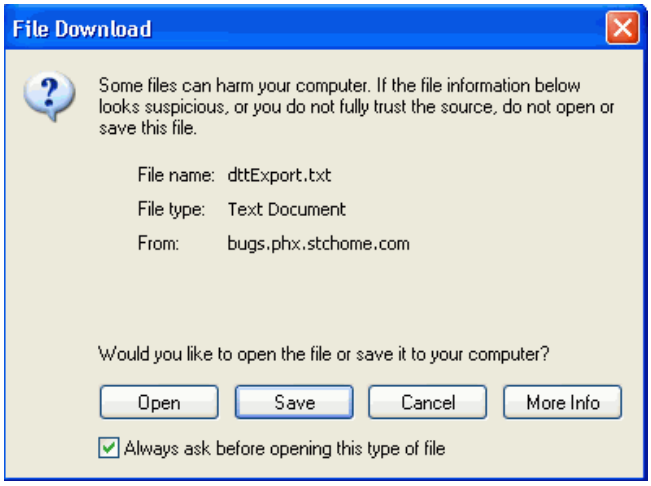


2. Point and click the drop-down arrow and select the **EXPORT PROFILE**.

3. Click on one of the available buttons:

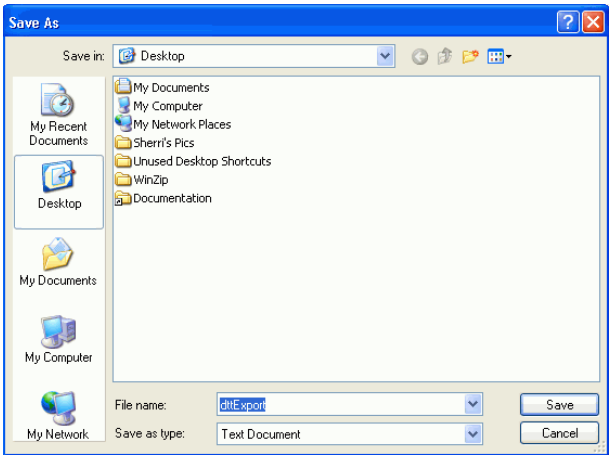
   - **EXPORT** – to begin the download process. A "File Download" dialog box appears.

Figure 21-15: Export – File Download Dialog Box



   a) Click the **SAVE** button to save the file to your local drive. The "Save As" dialog box appears.

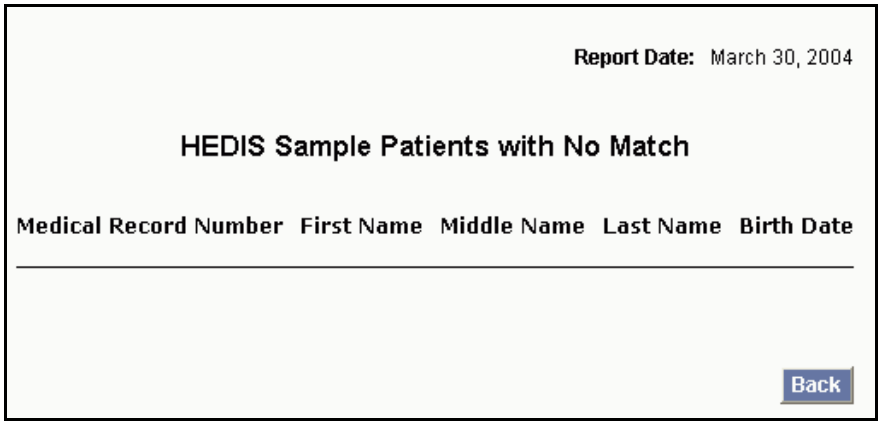
Figure 21-16: Export – File Save As Dialog Box



b) Choose the location to save the file and click the **SAVE** button.

- **VIEW NO MATCH REPORT** – to display a report of patients that were not matched.

Figure 21-17: Export – View No Match Report



a) While displaying the report, you may print the report using the browser's print button or click the **BACK** button to return to the "HEDIS Export" window.

- **DEFINE DATA PROFILE** – to define a new data profile or edit an existing one. Refer to the sub-section titled, "Define a new Data Profile / Edit Existing Profile" for instructions.

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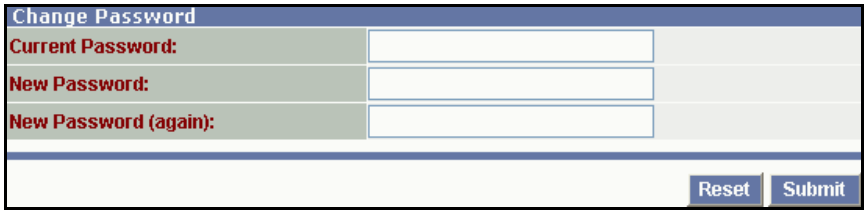
22 CHANGE PASSWORD

The **Change Password** option is available for all users. Once you receive your new user-id, it is recommended you change your password after you login the first time.

1. After logging into the **IWEB** application, click the **CHANGE PASSWORD** menu. The "Change Password" window appears.

Figure 22-1: Change Password



2. Type your current password in the **CURRENT PASSWORD** field and press the **TAB** key.
3. Type the new password in the **NEW PASSWORD** field and press the **TAB** key.
4. Type the new password again in the **NEW PASSWORD** (**AGAIN**) field.
5. Click the **SUBMIT** button to SAVE the change (a message appears at the top of the window indicating successful change) or the **RESET** button to erase the newly typed entries.

Note: The **RESET** button will not RESET a change after the SUBMIT button has been pressed.

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23 SCHEDULED REPORTS

The **Scheduled Reports** link is an administrative tool that utilizes "scheduling" of statistics including notifications. Scheduling can be done for:

- Reports
- Notifications
- Emails
- Faxes (state configurable option)

This is accomplished by setting up "scheduled" tasks in the Reports Module to automatically generate this information and send it.

Note: Using a scheduler such as the Microsoft Scheduler can also setup automatic running/processing of files, notifications, or reports.

For a list of the reports that can be scheduled, view the Reports Module section of the IWEB Application User Guide.

If you have the access level of IRMS Client with System Administration and UFM permissions, you will be able to view all scheduled reports for your IRMS.

If you have the access level of Registry Client with System Administration and UFM permissions, you will be able to view ALL scheduled reports for ALL IRMSs, as well as Pause the Scheduler.

SETTING UP A SCHEDULED TASK

All Scheduled Tasks are set up directly in the **Reports Module** and/or the **Management Reports Module**.

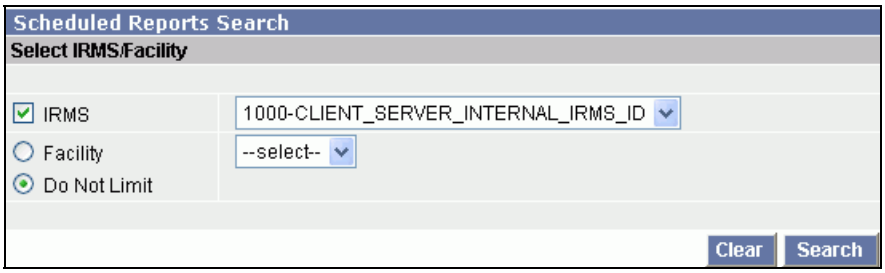
Refer to the section titled, "Reports Module." A report that can be scheduled will have a **SCHEDULE** button to the right of the report title.

VIEWING/EDITING SCHEDULED REPORTS

To view **SCHEDULED REPORTS**, perform the following:

1. Click the **SCHEDULE REPORTS** menu. The "Scheduled Reports Search" window appears:

Figure 23-1: Scheduled Reports Search



2. The fields and their descriptions are listed in the table:

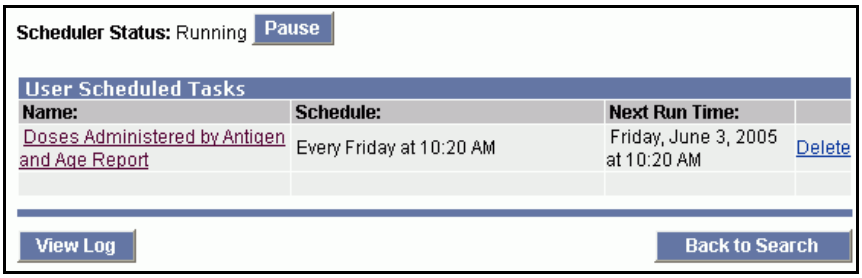
Table 23-1: Scheduled Reports Search Field Descriptions

FIELD	DESCRIPTION
IRMS	If you are an IRMS Client user with System Administration and UFM permissions, you can select your IRMS to view all scheduled reports. If you are a Registry Client user with System Administration and UFM permission, you can view ALL scheduled reports for ALL IRMSs. Click on the drop-down menu arrow to view/select your desired choice. The IRMS checkbox will automatically be selected.
FACILITY	To view scheduled reports for a specific facility, click the drop-down menu arrow to view/select your desired choice. The Facility radio button will automatically be selected.

3. Either choose an **IRMS** and/or **Facility**, or leave them set as -Select- to select all (if authorized).
4. Click on one of the available buttons:

- **CLEAR** – to erase any selections and remain on the window to re-enter selections.
- **SEARCH** – to begin the search for the criteria you entered. The "User Scheduled Tasks/Scheduler Status" window appears.

Figure 23-2: User Scheduled Tasks/Scheduler Status



5. The fields and their descriptions are listed in the table:

Table 23-2: User Scheduled Tasks/Scheduler Status Field Descriptions

FIELD	DESCRIPTION
SCHEDULER STATUS	Current status of the scheduler. If you are a Registry Client with System Permissions and UFM permissions, you have the authority to PAUSE the scheduler.
NAME	Name of the report that is scheduled. Click on the name of the report to access the Scheduler. Continue to the section titled, "Viewing the Report Criteria/Scheduler."
SCHEDULE	Scheduled day and time the report should run.
NEXT RUN TIME	Next scheduled day, date, and time the report will run

6. Click one of the available buttons/hyperlinks:

- **PAUSE/RESUME** – If you are a Registry Client, you have the authority to Pause and/or Resume a Scheduled Report.
- **VIEW LOG** – to display the "Scheduled Report Log" window.
- **BACK TO SEARCH** – to return to the "Scheduled Reports Search" window.

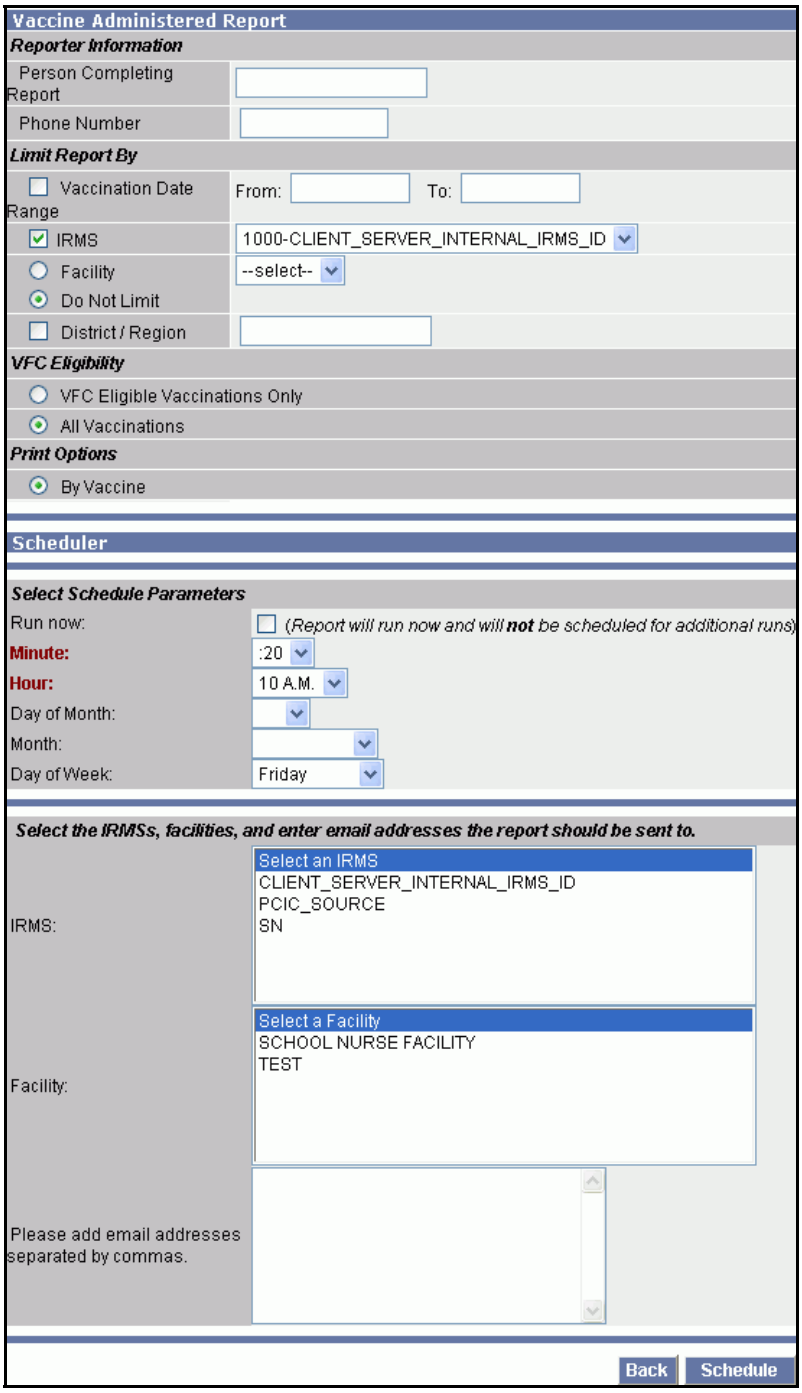
- **DELETE** (hyperlink) – to delete the Scheduled report.
- **REPORT NAME** – to view the actual report criteria used to schedule the report. Continue to the section titled, "Viewing the Report Criteria/Scheduler."

VIEWING/EDITING THE REPORT CRITERIA/SCHEDULER

To view/edit the Report Criteria/Scheduler, perform the following:

1. From the "User Scheduled Tasks/Scheduler Status" window, in the NAME column, click the hyperlink of the **REPORT NAME**. The "Name of Report – Limitations/Selections" window appears with the Scheduler window.

Figure 23-3: Report Name with Scheduler Window



2. The report's limitation/selection criteria appear at the top of the window, with the Scheduler criteria at the bottom.

- Refer to the actual report in the Module where it was submitted from for a list of field descriptions.

3. Edit the desired field(s). The fields and their descriptions are in the table.

Table 23-3: Edit Scheduled Task Field Descriptions

FIELD/OPTION	DESCRIPTION
RUN NOW (CHECKBOX)	If you desire to run the report NOW and NOT schedule it, click the checkbox.
MINUTE	The minutes that can be chosen are in five-minute intervals and will be used with the Hours field to indicate the "kick off" time for the report to run. Click on the drop-down arrow and point and click to make a selection. 00 is the default.
HOUR	The hours are an hour apart and will be used with the Minutes field to indicate the "kick off" time for the report to run. Click on the drop-down arrow and point and click to make a selection. 12 AM is the default. **Note**: There is an Administrative Setting for Scheduled Reports that allow reports to be run at certain times; thus, if a report does not run, check the Administration Scheduled Report Settings to determine if the hour (and minute) is correct.
DAY OF MONTH	Specific day of the month the report should run. If a blank appears, the report will run EVERY DAY. Click on the drop-down arrow and point and click to make a selection. Blank (or every day) is the default.
MONTH	Specific month the report should run. If a blank appears, the report will run EVERY MONTH. Click on the drop-down arrow and point and click to make a selection. BLANK (or every month) is the default.
DAY OF WEEK	Specific day of week the report should run. If a blank appears, the report will run EVERY DAY. Click on the drop-down arrow and point and click to make a selection. BLANK (or every day) is the default).

FIELD/OPTION	DESCRIPTION
IRMS **FACILITY**	Select an IRMS and/or Facility you want the report to go to. **Note**: Multiple selections can be made by holding down the **CTRL** key, while selecting from the list.
EMAIL	Type the email address the report should be sent to. If there is more than one email address, separate them with a comma.

4. Click one of the available buttons:

- **BACK** – to not save any changes and return to the previous window.
- **SCHEDULE**– to save your changes and advance to the module where the report originated.

DELETING A TASK

Deletion of a Scheduled Task can be done from the Reports Module or within Scheduled Reports.

1. Point and click on the **SCHEDULED REPORTS** option. The "User Scheduled Tasks/Scheduler Status" window appears

2. Point and click on the **DELETE** hyperlink to the right of the report name you want to delete. The TASK will immediately get deleted and be removed from the list.

VIEWING THE LOG

To view the Scheduled Report Log, perform the following:

1. Click the **VIEW LOG** button on the "User Scheduled Tasks/Scheduler Status" window. The "Scheduled Report Log" window appears.

Figure 23-4: Scheduled Report Log

2. The fields/columns and their descriptions are listed in the table:

Table 23-4: Scheduled Report Log Field/Column Descriptions

FIELD	DESCRIPTION
USERNAME	User that scheduled the report.
DESCRIPTION	Report Description (Title).
BEGIN TIME	Time that the report began to run.
END TIME	Time the report completed running.
STATUS	Status of the report.
ERROR	Error text if the report didn't run.

3. Click the **BACK** button to return to the "User Scheduled Tasks/Scheduler Status" window.

24 HELP MENU

There are various ways to obtain help when using the application:

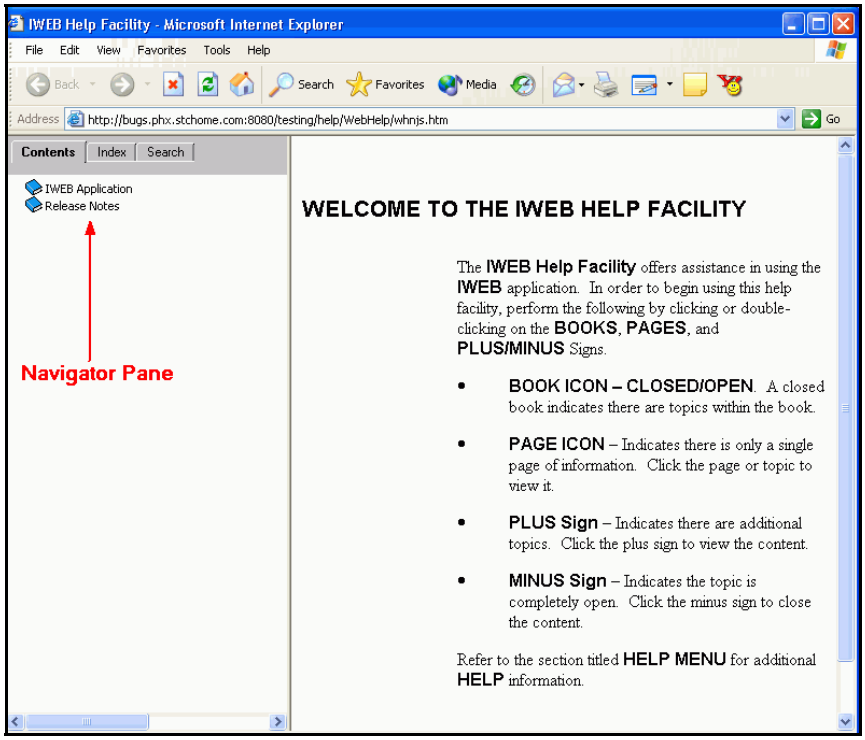
- Access the **Online Help facility** (shown below).
- Refer to the **Application User Guide, Quick Start Guide,** or **Quick Reference Pamphlet**.
- Call your local contact person in your state.

ACCESSING ONLINE HELP

The **Online Help** menu is designed to give the user an online user guide that will explain how to use the application menus and options. It is very similar to the printed IWEB Application User Guide.

1. Point and click on the **HELP** menu. The "Welcome to the IWEB Help Facility" window appears.

Figure 24-1: Welcome to the IWEB Help Facility



Viewing the illustration, there are two books—one for the **IWEB Application** (Application User Guide) and the other is the **Release Notes** for the version listing what is new for the specific release/version.

The left side of the window is referred to as the **Navigator Pane** containing the topics while the right side of the window contains the actual content associated with the topic.

USING THE HELP FACILITY

While using the Online Help Facility, the following can be done:

- View **Contents (Opening/Closing the Book)**
- View an **Index**
- Perform a **Search**

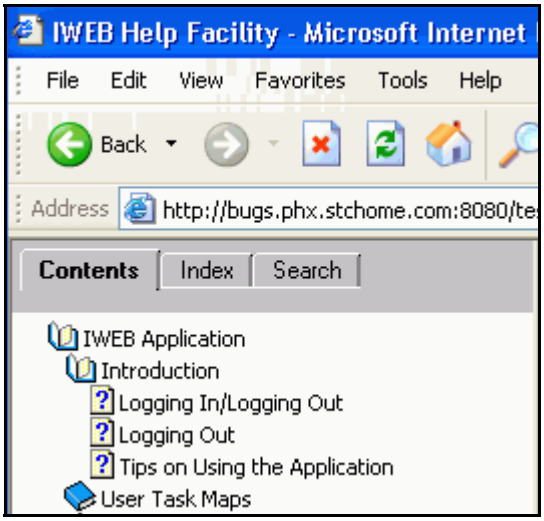
- **Close** the book

CONTENTS—OPENING/CLOSING THE BOOK

When viewing contents, there will be pages and additional books to open.

1. When the book appears closed, click on the book or the book's hyperlink to view the contents inside the book. The contents appear as pages with a question mark on them. The illustration below shows an open book with content pages.

Figure 24-2: Open Book



2. When you are finished with a topic, you can close the book by clicking on the book.

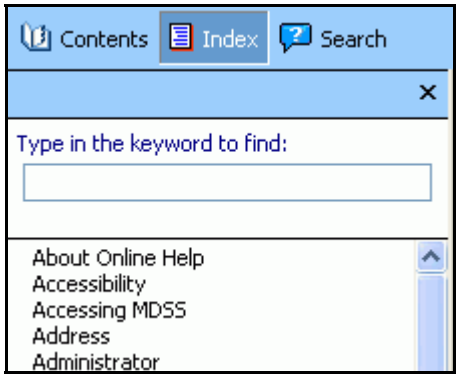
VIEWING AN INDEX

The index displays an alphabetized list where keywords can be entered. A global search is performed meaning the entire Help Facility is searched versus only the On-Line Help Facility book.

Note: Keyword entries are not case-sensitive.

1. Click on the **INDEX** tab.

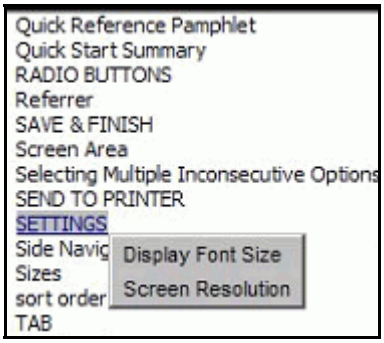
Figure 24-3: Index Tab



2. You can either:

- **SCROLL the List** –to view the contents of the index.
- **Type a Keyword** – to immediately reposition the index based on the letters you have typed. The index repositions as the letters are typed and will locate the first occurrence.

Figure 24-4: Keyword Sample



3. Point and click on the desired topic to view the contents.

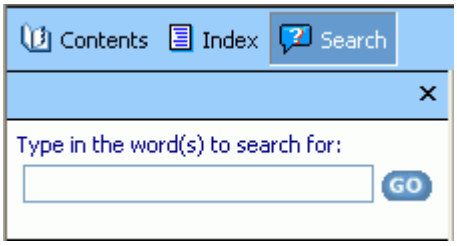
PERFORMING A SEARCH

The **SEARCH** displays an open field to type and enter a keyword. A global search is performed meaning the entire Help Facility is searched versus only the On-Line Help Facility book.

Note: Keyword entries are not case-sensitive.

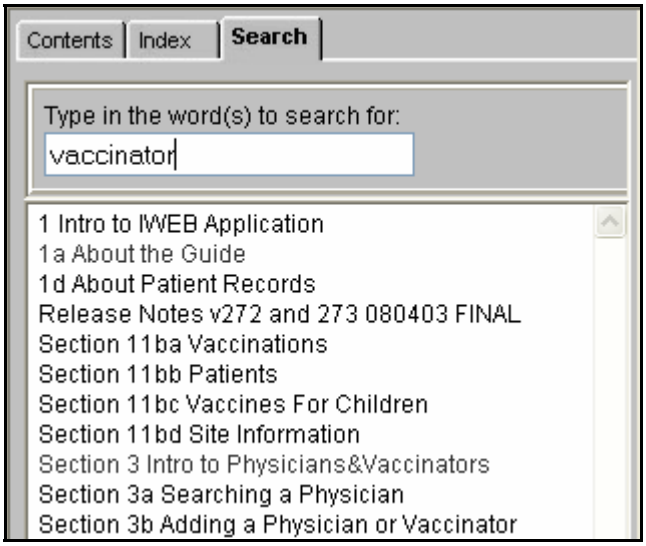
1. Click on the **SEARCH** tab.

Figure 24-5: Search Tab



2. Type the keyword and press the **ENTER** key. The search is performed and the Navigator Pane fills with the topics. If nothing is found, "**No Topics Found**" will appear in the Navigator Pane.

Figure 24-6: Navigator Pane



3. Locate the desired topic and click it to view it.

CLOSE NAVIGATOR PANE

You can close the "Navigator Pane" on and off by pressing the **close window icon** located at the top, right corner of the "Navigator Pane" window. To turn the "Navigator Pane" back on, click the **CONTENTS** tab.

By opening the "Navigator Pane," all the books and topics will display. By closing the "Navigator Pane," the content consumes the entire window.

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25 JOB QUEUE (CASA EXPORT)

The **JOB QUEUE** is used to view the CASA Export Jobs that are waiting to run or are currently running.

Within the CASA Export menu, there is an option, "Text File (Server Job)," that processes files in the background. When the file is ready it can be downloaded from the CASA Log screen.

In order to use the **JOB QUEUE**, you must have the access level of Registry Client with Registry Settings permissions.

To view the Job Queue, perform the following:

1. Click the **JOB QUEUE** menu. The "Current Jobs" window appears.

Figure 25-1: Current Jobs Queue

Current Jobs			
Jobs Running			
Description	Status	Username	Date/Time Entered
Jobs Waiting			
Description	Status	Username	Date/Time Entered

2. The top portion of the window displays the jobs currently running—the bottom portion of the window indicates jobs waiting to run.
3. To exit the window, click on a different menu.

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26 APPENDICES

The Appendices available are listed in the table.

Table 26-1: Appendices Topics

APPENDIX	TOPIC DESCRIPTION
A	Barcode Scanner & Font Installation
B	Single Sign-On Registration • Requesting a SSO Username/Password) • Requesting Application Access
C	Browser Settings • Enabling Cookies (Future) • Enabling Scripting (Future) • Disabling Pop-Up Blocker • Using Pop-Up Blocker in IE (Service Pack 2)

APPENDIX A: BARCODE SCANNER INSTALLATION

The scanner is designed to work with most IBM-compatible computers with PS/2 ports, and Windows operating systems. There are a few items needed before getting started:

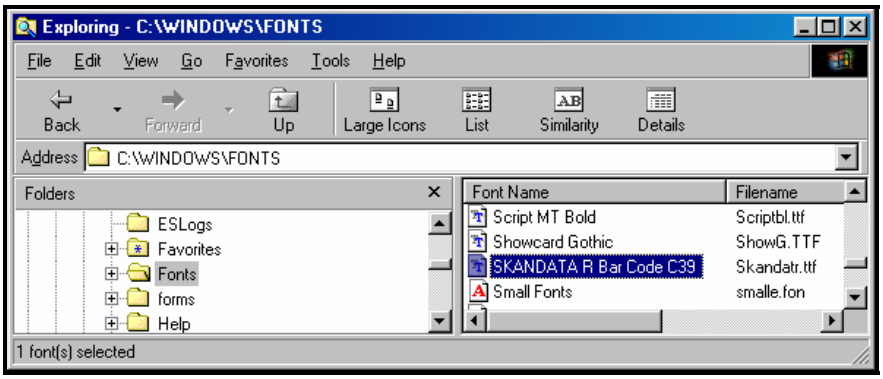
- Check the PC for the Barcode font needed for scanning. If the Bar Code font is not present, check with the system administrator to obtain it.
- There should be two components of the bar code scanner:
  - The "Y" splitter cable
  - The Wedge scanner

BARCODE FONT INSTALLATION

Perform the following to install the Barcode font:

1. Ensure the Bar Code scanner font is installed on the computer where the scanner is to be attached.
2. The Fonts folder is usually located in the "Windows" or "WINNT" folder. For example, (C:\WINDOWS\Fonts)

Figure 26-1: Windows Barcode Font Folder



3. Turn off the computer.
4. Attach the scanner using a "Y" splitter cable.
   - A "Y" cable should be provided with the scanner for installation. It is called a "Y" splitter because it has three ends.

a) One end attaches to the PC

b) One to the scanner

c) One to the keyboard.

- If the splitter cable does not come with the scanner, check with the system administrator to obtain it.

5. Turn on the computer. The scanner should now be ready to use.

APPENDIX B: SINGLE SIGN-ON REGISTRATION

The state's IT department maintains control over newly added users via the Single Sign-On (SSO) verification process. This process has been implemented to administer passwords, access, and other administrative tasks.

There are two steps to the SSO Registration:

- Requesting a Single Sign-On (SSO) Username and Password
- Requesting Access to the Application

To request a Single Sign-On Username and Password, perform the following:

Note: These instructions may vary per state. If you are unsure of your state's policy, contact your local state's System Administrator.

REQUESTING AN SSO USERNAME/PASSWORD

To request an SSO Username and Password, perform the following steps:

1. Point your Internet Browser to your state's URL address. For example,

`https://phin.wvdhhr.org/soso/ns/register.tt2`

2. You will be prompted for basic information such as your:

- First Name
- Last Name
- (Working) Email Address

3. Click the **SEND/SUBMIT** button. A confirmation message is displayed on your window and a message is sent to the SOSO Administrator.

4. When the SOSO Administrator approves your request (which could take a few days), a registration

acknowledgement email is sent to you providing you with your Username and password.

Note: This password is for "one-time" use, meaning, you will use it one time to logon and change your password.

5. When you log on to SOSO, you will log on and immediately change your password.

SIGNING ONTO SOSO/ REQUEST APPLICATION ACCESS

Once you have received your SSO username and password, you are ready to sign into SSO, change your password, and then request access to the SIIS-IWeb application.

1. Using your Internet Browser, type the following URL into the Location/Address text box:

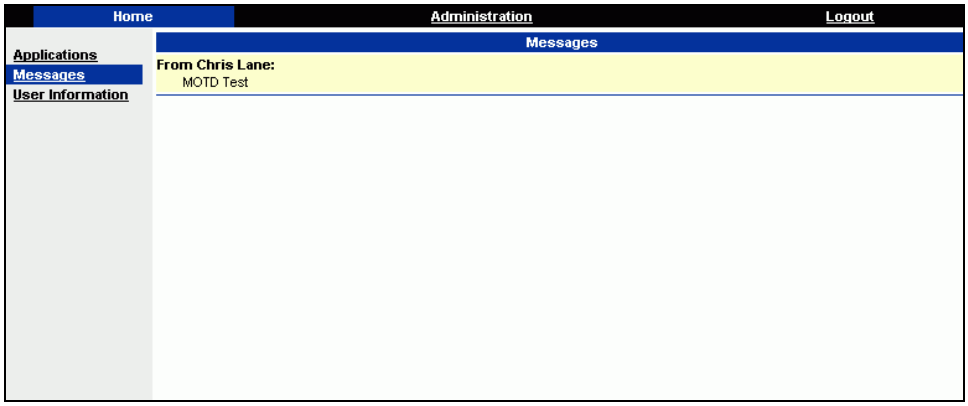
`https://phin.wvdhhr.org/soso/ns/register.tt2`

The "Single Sign-On" window appears:

Figure 26-2: SoSo Login

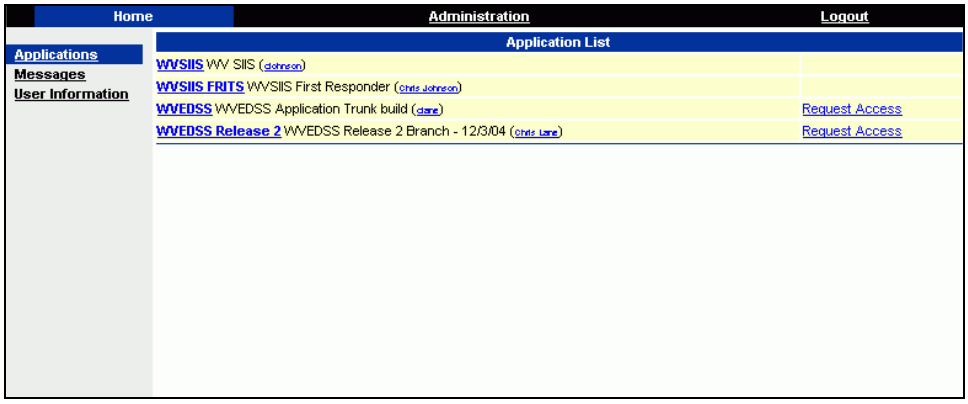
2. Type your **USERNAME**, press the **TAB** key, type your **PASSWORD**, and then click the **LOGIN** button. Your state's "HOME Menu/Page" window appears:

Figure 26-3: Home Menu/Page



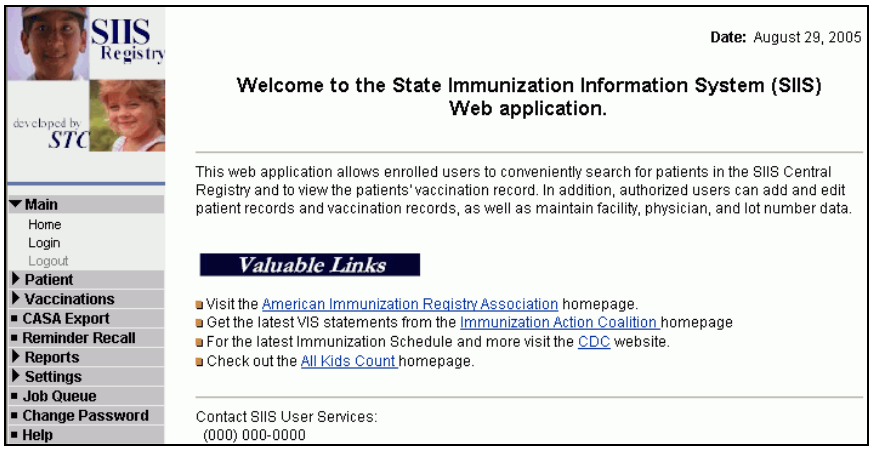
3. From the left SideBar, click the **APPLICATIONS** link. The "Applications List" window appears:

Figure 26-4: Applications List



4. For the purpose of these instructions, click on the SIIS hyperlink (Application name containing an underline). The "Welcome to the State Immunization Information System (SIIS)" window appears:

Figure 26-5: Welcome Window



5. From the **MAIN** menu, click on the **LOGIN** option. The "Request Access to this Application" window appears:

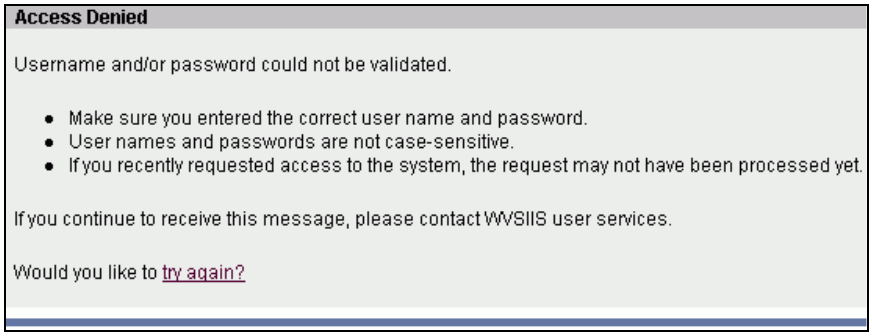
Figure 26-6: Request Access to this Application

6. Select your specific **IRMS** and/or **FACILITY** and click the ADD button. Your request will be sent via email to your state's Application Administrator.

7. Your System Administrator will inform you via email of your Application Username and Password.

- If you try to access the application before receiving your Application Username and Password, you will see the "Access Denied" window.

Figure 26-7: Access Denied



8. When you receive your Application Username and Password, you are able to use the SIIS-IWeb Application. Please continue to the SIIS-IWeb Application User Guide chapter titled, "The Home Menu: Logging In/Out."

APPENDIX C: BROWSER SETTINGS

The following settings should be set before you log into the IWEB Application.

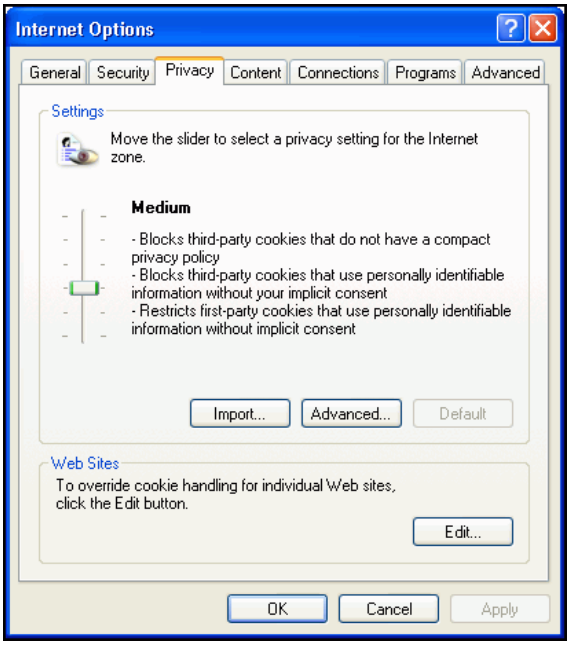
- **ENABLE** your browser to **ACCEPT COOKIES** & **SCRIPTING.**
- **DISABLE** your browser for **POP-UP BLOCKER**.

ENABLING/ACCEPTING COOKIES & SCRIPTING

To enable the **COOKIES** and **SCRIPTING**, perform the following:

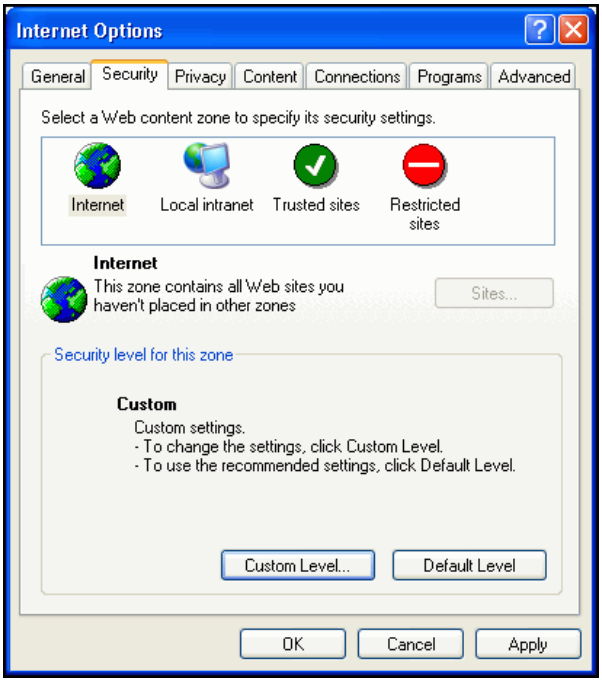
1. Click on **TOOLS** | **INTERNET OPTIONS**… and then click the **PRIVACY** tab. The "Privacy" settings appear.

Figure 26-8: Internet Options / Privacy Tab



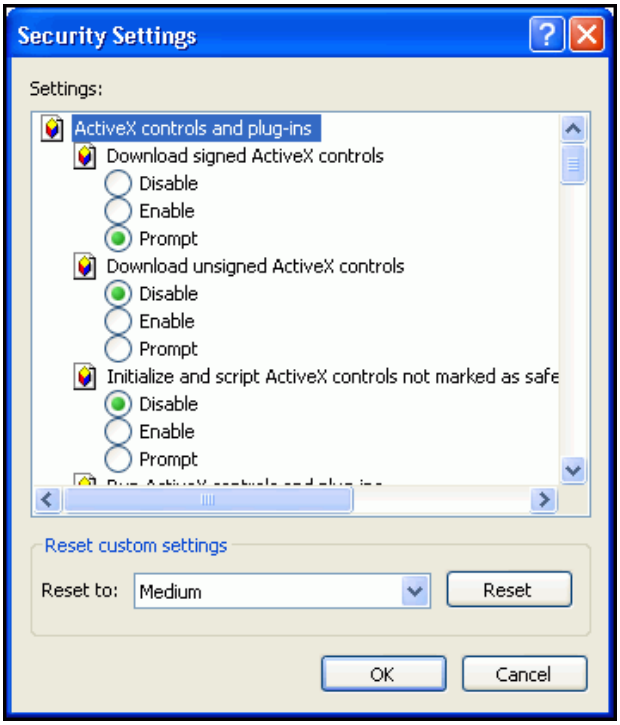
2. To enable the **COOKIES**, slide the slide-bar to change the "Settings" from Medium-high to **Medium**.
3. Click the **SECURITY** tab. The “Security Settings appear:

Figure 26-9: Internet Options / Security Tab



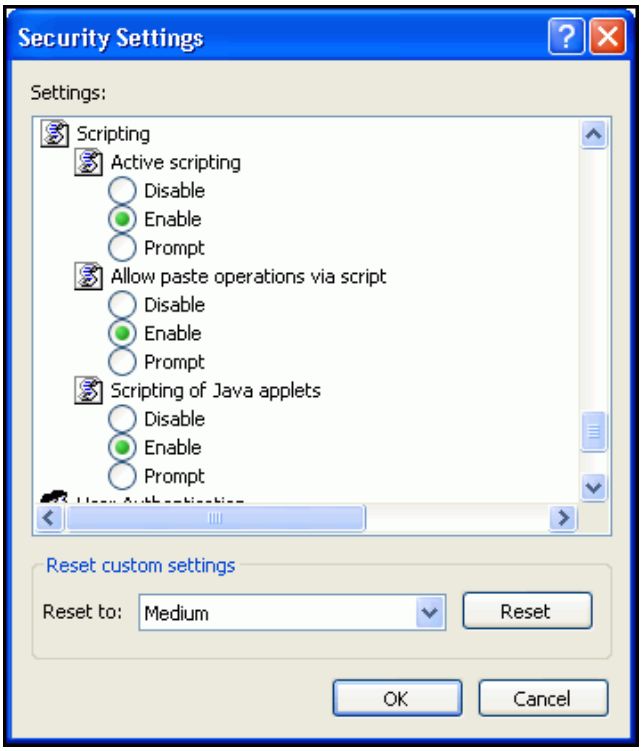
4. Click the **CUSTOM LEVEL**… button. The "Security Settings" window appears:

Figure 26-10: Security Settings



5. Slide the slide-bar (located on the right side of the window) down until you see the setting for **SCRIPTING**.

Figure 26-11: Security Settings / Scripting of Java Applets



6. If the **ENABLE** radio button is not selected, click it to select/enable it.
7. Click the **OK** button. The "Internet Options – Security" window reappears.
8. Click the **APPLY** button to apply the new settings and then click the **OK** button.

DISABLING POP-UP BLOCKER

To block Pop-Ups even if they are launched when you click a link or button on a Web site, perform the following:

1. Open the **Internet Explorer Browser**.
2. On the **TOOLS** menu, point to Pop-up Blocker, and then click Pop-Up Blocker Settings.
3. Select the **HIGH** setting in the box near the bottom of the dialog box.

Note: If you want to see Pop-ups that are blocked when you have this settings turned on, hold down the CTRL key while the window opens.

USING POP-UP BLOCKER IN IE (SERVICE PACK 2)

When installing Service Pack 2, Microsoft's Pop-Up Blocker is turned on by default in Internet Explorer and set to the medium setting, which means it will block most automatic pop-ups.

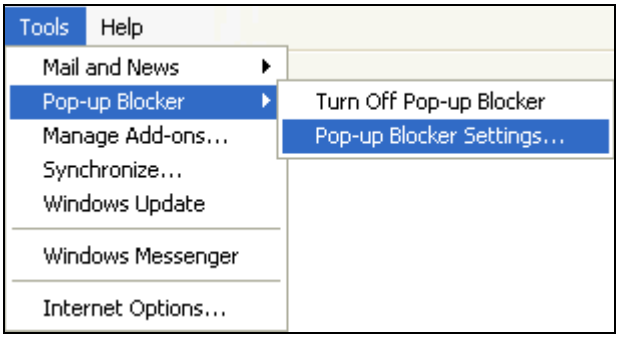
The default settings for the Pop-Up Blocker allow you to see pop-ups that are opened when you click a link or button on a Web site. Pop-Up Blocker will also play a sound and show the Information Bar when a pop-up is blocked. You can adjust these settings so that Pop-up Blocker works the way you want it to.

CHANGING POP-UP BLOCKER SETTINGS

To change the Pop-Up Blocker Settings, perform the following:

1. Open internet Explorer. On the Tools menu, point to Pop-up Blocker, and then click Pop-up Blocker Settings.

Figure 26-12: IE Tools Menu / Pop-up Blocker



2. If you want to see Pop-Up windows from a specific Web site, type the address (or URL) of the site in the field labeled, "**ADDRESS OF WEB SITE TO ALLOW**" and then click the **ADD** button (illustration shown below).

Figure 26-13: Pop-Up Blocker Settings

ALLOWING A SITE TO DISPLAY POP-UPS TEMPORARILY

To temporarily allow a site to display Pop-ups, perform the following:

1. Click the Information Bar when it notifies you that a Pop-Up has been blocked.
2. Click the option **TEMPORARILY ALLOW POP-UPS** option.

BLOCKING POP-UPS WHEN LAUNCHED

To block Pop-Ups even if they are launched when you click a link or button on a Web site, perform the following:

1. Open the **Internet Explorer Browser**.
2. On the **TOOLS** menu, point to Pop-up Blocker, and then click Pop-Up Blocker Settings.

3. Select the **HIGH** setting in the box near the bottom of the dialog box.

Note: If you want to see Pop-ups that are blocked when you have this settings turned on, hold down the CTRL key while the window opens.

TROUBLESHOOTING POP-UP BLOCKER

If you have installed SP2 and you still see Pop-Ups in Internet Explorer, try these solutions below:

1. Make sure **Pop-Up Blocker** is turned on.
   - Pop-up Blocker is turned on by default, but someone may have turned it off.
2. Turn on Pop-Up Blocker, by performing the following:
   - On the **TOOLS** menu, point to Pop-Up Blocker.
   - Click the **TURN ON POP-UP BLOCKER** option.

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