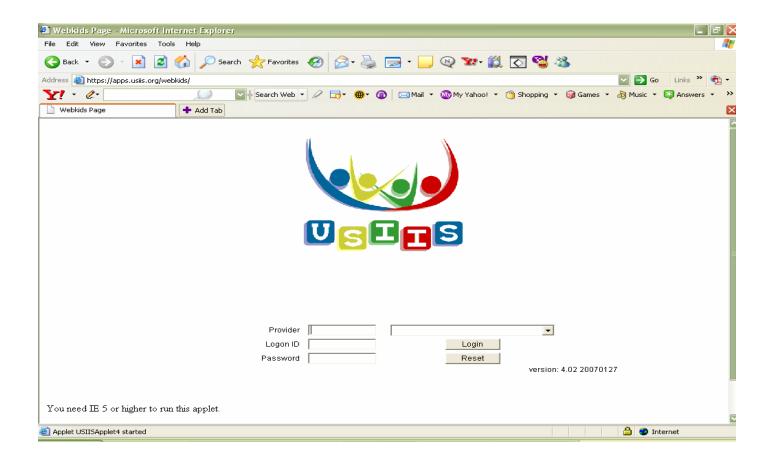


An important

new tool for

Patient Care Screens

Patient Care Screens



A. To locate USIIS:

1. Open your web browser, type **https://apps.usiis.org/webkids/** in the address bar and press the **Enter** key.

B. To login to USIIS:

1. Enter the clinic number in the **Provider** field. If you don't know your clinic number, you can find the name in the drop-down box next to the provider field.

Note: Use the mouse or Tab key to move through the fields.

2. Enter your Logon ID. (These are case sensitive fields.)

3. Enter your Password. (These are case sensitive fields.)

4. Click on the Login button or press the Enter key.

• If your login was successful, the **Patient Search** screen will appear.

• If you have incorrectly logged in, reset the fields by clicking the **Reset** button and retry the login process.

• If you continue to have problems, contact the USIIS Helpline at (801) 538-3440 or (800) 678-3440.

To locate USIIS forms & information:

1. Open your web browser, type **www.usiis.org** in the address bar and press the **Enter** key.

* For the most up-to-date version of the Desktop Reference Guide and User Manual, visit our website at www.usiis.org.



Search Value			🔹 🔹 Patient ID	USIIS ID	
Last Name	First Name Mid	dle N. Suffix Birth	Bearch Add New Pa	t. CF Mother's First Mother's Maid	len
Provider Search	Results 💿 N	lost possible match	C All match	Save to List	-
Pat. ID	Last Name	First Name	Mid. N. Birth Date	SSN Sex M's First M's Maider	ŗ

USIIS Search Results

USI	SID Last	Name	First Name	Middle Name I	Birth Date	Sex	Mother's First
				i i			
	1		1				1
Laward	Lost os sub-	Det la C	in the second		Environt III o		Den est. Astroite
Logout	Pat. Search	Pat. Info. 🛛 📿 O	mments Immun.	ContraEpt	Forecast C	ASA	Report Admin.

A. To Perform a Patient ID search:

- **1.** Enter the **Patient ID** number in the red Patient ID field (*this field is case sensitive*) and press the **Enter** key.
- 2. The Patient Information screen will automatically appear with the patient's information.

B. To Perform a Provider Search:

- 1. Type the patient's Last Name and/or First Name and/or Birth Date.
- **2.** Click on the **Provider Search** button, the patient's name will appear in the Provider Search **Results** section. (If the patient's record is not found, go to C: To perform a USIIS Search.)
- 3. Click on the correct name to open the patient's record. The Patient Information screen will appear.

C. To Perform a USIIS Search:

- **1.** Enter ONLY the **Last Name**, **First Name** and **Birth Date** (mm/dd/yyyy), as it appears on the birth certificate. Tab to the next field and click on the **USIIS Search** button.
- 2. Click on the correct name to open the patient's record. Read and click YES in the dialog box that appears. The Patient Information screen will appear. If the patient's information is not found, check to see if the data was correctly entered. If it is correct, please continue to D: To Add a New Patient.

D. To Add a New Patient:

- **1.** If the data was entered correctly and no record was found with a USIIS Search, click on the **Add New Pat.** button.
- 2. Click OK in the dialog box that appears, and the Patient Information screen automatically appears.
- 3. Assign and enter a Patient ID number (this is a unique number that identifies only this particular patient as your client).
- **4.** Enter the Mother's Maiden name (*type "unknown" only if mother's maiden name is absolutely not known*), patient's gender, patient's middle name and <u>all</u> other information you have regarding the patient.
- 5. Click on the Save button to save this new patient entry.

E. To Clear the Fields:

1. Click the **Reset** button to clear the search and begin again.

F. To Identify the Patient's Record Type:

- **C** (Central) The same information can be accessed by all providers.
- W (Web) Patient's record has been updated by your clinic & cannot be viewed by other clinics until a download occurs.
- A (Alias) Duplicate records for the same patient have been identified and merged under the legal name.
- P (Possible) Patient could be a duplicate. Please contact the USIIS HelpDesk at (801) 538-3440 or (800) 678-3440.

Patient Search

Patient Info.	Age: 7 Y	ears 10 Months	Patient ID	80001964	USIIS ID 644	765
	Save	Delete Clinic Affiliatio	n 🕴 Delete Web Re	cord		Reset
Last Name	First Name Mi	ldle N. Suffix Birth I	Date SSN	Gender N	Nother's First Mo	ther's Maiden
DOE	JOHN	10/10)/1999		JANE S	MITH
	Patient.'s Middle Name	Suffix Gender S	3SN	Mother's Ma	iden	
[M 💌		SMITH		
	CONTRAINDICATIONS AN	ID EXEMPTIONS				
Street	100NORTH 100 EAST	Status		. €	end Reminder C	ard No 🖵
City	ANYTOWN	Race	0	•		
	UT 🚽 Zip 84115	Ethnicity	U UNKNOWN	Comment	s	
Phone	(801) 555-1234	Confidential flag	No 💌			<u>~</u>
County	9 SALT LAKE	Release Date		_		
Birth State	UT UTAH	Physician		-		
Provider	801 USIIS PROGR	RAM		-		
Mother's La	act DOF	Father's Last	DOF	Guardian's	Last DOE	
Mother's Fi		Father's First		Guardian's		
				_		
Mother's Mide		Father's Middle		Guardian's M		
Mother's St	ן אפ	Father's SSN	1	Guardian's	SON J	
Logout P:	at. Search Pat. Info.	Comments Immur	n. ContraEpt Fo	irecast CAS	A Report	Admin.

A. To Make Edits and/or Additions:

1. Assign a Patient ID, if not already done.

2. Review, update and add any new information and click on the Save button to save the changes.

Note: Information fields identified in Red are required. Gender, Mother's Maiden name and Patient's Middle Name should be entered in the yellow area.

B. To Delete a Patient's Clinic Affiliation:

You may want to do this if a patient no longer attends your clinic.

- 1. Click on the Delete Clinic Affiliation button in the upper part of the screen.
- 2. Follow the instructions that will appear in the dialog box(es).
- 3. After you complete the instructions in the dialog box(es), the Patient Search screen will appear.

Note: The patient's information will remain in the USIIS database, however, you will not be able to find the patient using a Provider or Patient ID Search.

C. To Delete a Patient's Web Record:

If there are multiple mistakes on a patient's record that have been recently saved, you may want to delete the web record and start over. This may be done if the record was created and saved in the same business day. This will delete any patient or immunization information you have just saved.

1. Click on the **Delete Web Record** button in the upper part of the screen.

2. The **Patient Search** screen will appear and you can begin a new search.

D. To Clear the Fields:

1. Click the **Reset** button to clear and begin again.

Comments	Age: 7 N	′ears 10 Months	 Patient 	ID 80001964	USIIS ID 64476	65
Last Name	Save Comment First Name Mi JOHN	ddle N. Suffix Birth Da			Mother's First Moth	Reset ner's Maiden ITH
Patient Co	mments	Share No 💌				
					~	
Prov.	Date Commen	t			<u> </u>	
Logout	Pat. Search Pat. Info.	Comments Immun.	ContraEpt	Forecast CAS	A Report	Admin.

A. To Enter Patient Comments:

- 1. Type the comments in the white box titled Patient Comments.
- 2. Choose Yes or No in the Share drop-down box:
 - If **Yes** is selected, the comment will be shared with <u>all</u> other clinics.
 - If **No** is selected, only the clinic that entered the information will be able to view the comment.
- **3.** Click on the **Save Comment** button (*in the upper part of the screen*) to save the comment you entered.
- 4. Once the comment has been saved, it will appear in the gray cells below and in the Patient Information screen.
- 5. To view the entire comment, click in the comment cell and it will appear in the Patient Comments section.

B. To Delete a Comment:

1. In the gray cells, below the **Patient Comments** section, click in the cell of the comment to be deleted.

2. Click the **Delete Comment** button (in the upper part of the screen).

3. Click OK to finish the deletion.

C. To Edit a Comment:

1. In the gray cells, below the Patient Comments section, click in the cell of the comment to be edited.

2. Make changes to the comment in the white box.

3. Click the **Save Comment** button (*in the upper part of the screen*).

D. To Clear the Fields:

1. Click the **Reset** button to clear the comment and begin again.

Comments

Immunization	Ag	e: 7 Years 10	Months	Patient ID 800	01964	USIIS ID 6	44765	
	Historica	il Data Entry	Save	Delete			Reset	
	rst Name	Middle N.	Suffix Birth Da	te SSN	Gender M	other's First	Mother's Ma	iden
DOE JO	они		10/10/1	999	⊙ M J.	ANE	SMITH	
Vaccination Date			Vaccination Series	,	icella immuni Date I	ity on Provider	ECR	1
Route			DTP	DTaP	09/20/2002			
Immunization Site			DTP		01/14/2002			
Infindinzation one				DTaP	10/02/2001			
			> DTP > HIB	DTaP HIB - UNSPECIFIED	09/02/2001		v	
Lot Number					01/14/2002			
Dosage 0).5 mL		POLIO	IPV	10/02/2001		i i i	
Manufacturer		- ic	MMR	MMR	10/02/2001			Í
Financial Class			MMR	MMR	10/02/2000			F
VIS Version Date			HEP-B		01/14/2002			
VIS Issue Date			> HEP-B > HEP-A	HEPATITIS B - ADULT HEPATITIS A - PEDIAT	10/02/2001			
			/ INCE-A		102/01/2005 [1 1 1	<u> </u>
Consent Date			_					_
Vaccinator		_	General Note					
Reaction		👻 F	Reaction Note					_
Invalid		-	Invalid Note					-
		_	,					
Logout Pat. Sea	arch Pat. In	fo. Comme	ents Immun.	ContraEpt Foreca	ist CAS/	A Repo	rt Adm	nin.

A. To Enter a Vaccination:

- **1.** Enter all the information for administered vaccines in the appropriate fields.
- **Note:** The fields labeled in red must be completed in order to save. The E, C, R, I cells (Exemption, Contraindication, Reaction and Invalid) are for display only.
- 2. Use the drop-down boxes to choose from the lists or enter the appropriate codes.
- **Note:** *To keep clinic inventory accurate, lot number needs to be selected from the drop-down box.*
- 3. You may enter notes for the particular vaccination in the following fields:
 - General Note: Any information relating to a particular immunization.
 - Reaction Note: If a reaction occurred after vaccination, document the reaction information.
 - Invalid Note: Explain why a particular immunization was invalid.
- 4. Click on the Save button to save.

B. To Make Changes to a Vaccination Already Saved in the Vaccination History:

- **1.** In the **Vaccination History** cells (*gray box*), click in the cell that has the vaccination you would like to alter. The vaccination information will appear in the fields on the left.
- **2.** Make the appropriate additions/changes.
- 3. Click the Save button to save the changes.

C. To Enter Varicella Immunity:

- **1.** Check the **Varicella Immunity** box and enter an approximate date the patient had the disease.
- **2.** Click **OK** to save the immunity.

D. To Clear the Fields:

1. Click the **Reset** button to clear the vaccine information and begin again.

E. To Enter Several Vaccinations into the Historical Data Entry Screen:

1. Click on the **Historical Data Entry** button *(in the top part of the Immun. screen)* to enter previous vaccinations. The screen will change to show new fields.

Immunizations

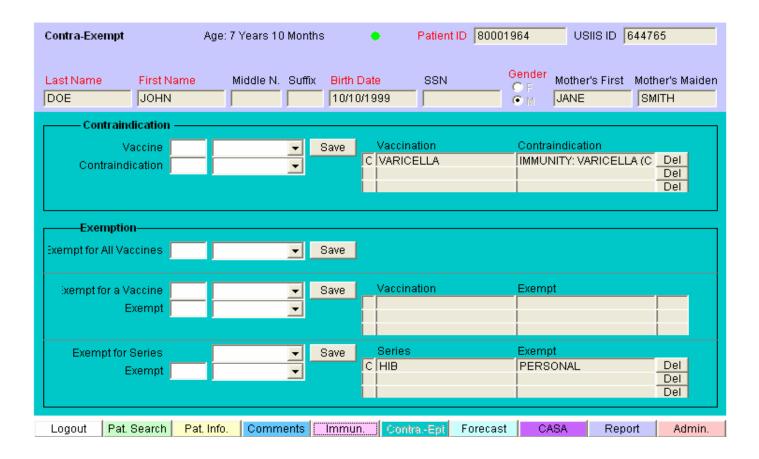
Immunization	patch	Age: 1	7 Years 10 Mo	nths	٠	Pat	tient ID 8000	1964	USIIS	ID 6447	65
					Save		Delete				Reset
Last Name	First Name		Middle N. Su		Birth Date	S	SN	Gende O F	Mother's F		ner's Maiden
DOE	JOHN				10/10/1999			ΘM	JANE	JSM	IITH
Please only us	e this form to (enter h	istorical imm	unizat	ion records						
Vaccine Ty	pe Date	Туре	e Date	Туре	Date	Туре	Date	Type D)ate	Type Dat	e
DTP 💌 🖊	0 01/14/2002	20	09/02/2001	20	10/02/2001	20	09/20/2002				
нів 💌 17	11/10/2000			ĺ				ÍÍ			
Polio 🔽 11	0 01/14/2002	10	10/02/2001								
MMR 💌 3	10/02/2000	3	10/02/2001								
НерВ 💌 43	10/02/2001	110	01/14/2002								
Varice 💌											
HepA 🗾 31	07/01/2004	31	02/01/2005								
Pneumo 👤											
Mening 👤											
Logout Pa	t. Search Pa	t. Info.	Comments	lr Ir	nmun. Co	ntraE	pt Forecas	st 🛛 🔾	CASA	Report	Admin.

To Enter Several Vaccinations into the Historical Data Screen:

- **1.** Enter the vaccine information by using the drop-down box to choose from the list of vaccines or by typing the appropriate code.
- Note: The code must match the vaccine to the left. Otherwise, it may be entered in the empty cells at the bottom.
- **2.** Enter the date (mm/dd/yyyy) the vaccine was given.
- Note: When 6 or 8 digit date is entered, USIIS will format when you tab to the next field.
- **3.** Repeat above process to enter all historical vaccinations and dates. After all the vaccination information is correctly entered, click on the **Save** button to save.

Note: Click on the Immun. tab to return to the Immunization screen.

Note: The historical data screen should only be used for vaccinations your clinic did not administer.



A. To Enter a Contraindication:

- 1. Enter the vaccine by using the drop-down box to pick from a list of vaccines or enter the vaccine code.
- **2.** Enter the contraindication, by using the drop-down box to pick from a list of contraindications or enter the code.
- **3.** After both the vaccine and contraindication have been chosen, click the **Save** button. The vaccine and contraindication will appear in the gray cells on the right.

B. To Delete a Contraindication:

1. Click on the gray Del (delete) button beside the vaccination/contraindication that you want to delete.

C. To Enter an Exemption for All Vaccines:

1. Use the drop-down box to select from a list of exemptions or enter the code.

2. Click on the Save button.

D. To Enter an Exemption for a Particular vaccine:

1. Use the drop-down box to select from a list of vaccines or enter the vaccine code.

2. Use the drop-down box to select from a list of exemptions or enter the code.

3. Click on the Save button. The vaccine exemption will appear in the gray cells on the right.

E. To Enter an Exemption for a Series of Vaccines:

1. Use the drop-down box to select from a list of vaccine series or enter the vaccine code.

2. Use the drop-down box to select form a list of exemptions or enter the code.

3. Click on the Save button. The vaccine exemption will appear in the gray cells on the right.

F. To Delete an Exemption:

1. Click on the gray **Del** (Delete) button beside the exemption that you want to delete.

Contraindications

Forecast	Age: 7 Years 10 Months	•	Patient ID 80	0001964	USIIS ID 6	44765
Last Name DOE		Birth Date 10/10/1999	SSN	OF	Nother's First JANE	Mother's Maiden

Forecast

Series	Dose1	Dose2	Dose3	Dose4	Dose5	Dose6	Next Due	Status	С	Е	R
DTP/DTaP/DT	09/02/2001	10/02/2001	01/14/2002	09/20/2002				COMPLETE			
Td			J				10/10/2003	OVERDUE			
HIB	11/10/2000		ļ				01/05/2001	COMPLETE		Y	
POLIO	10/02/2001	01/14/2002					02/11/2002	OVERDUE			
MMR	10/02/2001		J]		10/10/2003	OVERDUE			
HEP-B	10/02/2001	01/14/2002	ļ				03/11/2002	OVERDUE			
PNEUMO PCV-7	7						12/10/1999	COMPLETE			
CHICKENPOX								IMMUNE	Y		
HEP-A	07/01/2004	02/01/2005	J					COMPLETE			
FLU			ļ				04/10/2000	OVERDUE			
MENINGOCOCO							10/10/2010	CURRENT			
									_	ন	
- Due = is due			· ·								
- Overdue = th	e vaccine serie	es is 30 days	or more past	t the due date)						

Current = may be receiving a vaccine series and is not yet due for the next dose, or is not yet due for the first dose.

Complete = needs no further doses of the vaccine series

Logout Pat. Search

Pat. Info.

Comments Immun.

Contra.-Ept Forecast Report

Forecast Report

CASA

Admin.

A. To Print a Patient Forecast:

- **1.** In the **Forecast** screen, click on the **Forecast Report** button (*located at the lower right side of the screen*). The report will open a new window in PDF format using the Adobe Acrobat software.
- 2. Once the forecast report downloads from Adobe Acrobat, click on the print icon in Adobe to print the forecast.
- **3.** Close Acrobat and go back to the Forecast screen when you are done.

Note: *This screen is not for data entry.*

Adobe Acrobat Reader software is needed to print a patient's forecast. Please visit: www.adobe.com to download a free version of Acrobat Reader. If you have trouble with this download, please contact the USIIS HelpLine at (801) 538-3440 or (800) 678-3440.

Note: If a vaccination is invalid, the immunization date will NOT appear in the forecast. View the vaccination in the Immunization screen to see the reason the vaccine is invalid.

Report	Age	: 7 Years 10 Month	s 🔸	Patient ID 80	001964	USIIS ID 🛛	644765
Last Name DOE	First Name	Middle N. Suffix	Birth Date	SSN	_ OF ,	Mother's First JANE	Mother's Maiden
Patient's Report	s						
	Report(s) to ru	n:			Output to:		
		munization History			• PDF		
		unization Record ah Immunization R	ecord				
	hlata: lftha vanaut i						
		bage does not appe nust be allowed fro					
		Rur	n Report(s)				
Logout Pat.	Search Pat. Info	o. Comments	Immun. Con	traEpt Foreca	ast CA	SA Repo	ort Admin.

Patient Reports Available to Print:

- 1. Detailed Immunization History (for the patient's chart)
- 2. School Immunization Record "Pink Card" (to take to the school for school entry)
- 3. Personal Utah Immunization Record (for the patient's record)

A. To Print a PDF Report:

- **Note:** Your computer must have Acrobat Reader installed for this option to work. If you have trouble opening this report, check for pop-up blockers then contact the USIIS HelpLine at (801) 538-3440 or (800) 678-3440.
- **1.** Click on the button of the desired report.
- Note: You may choose more than one report at a time, if needed.
- 2. Click Run Report(s).
- 3. Once the report downloads from Adobe Acrobat, click on the print icon in Adobe to print the report.
- **4.** Close the Acrobat window to go back to the Report screen when you are finished.

B. To find the Admin functions:

To access information regarding the clinic, click on the Admin tab (located at the bottom right of the screen). This button will open a separate window with additional features (tabs) regarding the clinic. Admin features include:

- Change Password
- User Management
- Clinic Inventory
- Inventory Adjustment
- Batch List
- Clinic Reports (Clinic History, Doses Administered, Reminder/Recall, Batch Forecast and Unbilled Vaccines)

Clinic Administration Screens

Clinic Administration Screens

Change Your Password	•	
Old Password		
New Password		
Retype New Password		
Update	Reset	
Logout Change Pass, User Management Inventor	γ 🔰 Inven. Adjust 📄 Batch List	Report Provider

A. To Change Your Login Password:

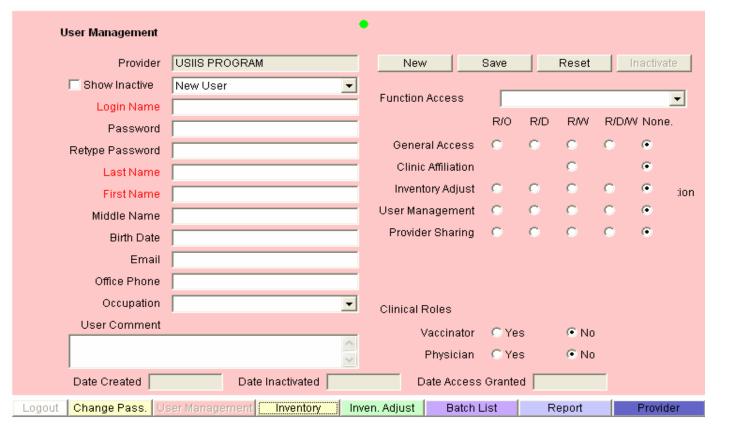
Note: *Passwords should be at least 6 characters and alpha-numeric.*

- **1.** Type your current password in the **Old Password** field. (*This is case sensitive*.)
- 2. Type your new password in the New Password field. (This is case sensitive.)
- 3. Retype your new password in the Retype New Password field. (This is case sensitive.)
- 4. Click Update button to save your new password.

B. To Clear the Fields:

1. Click the **Reset** button to clear the password fields and begin again.

Change Password



Access to this screen is only available to trained, authorized users.

A. To Add a New User:

- 1. Type in the user's chosen Login Name. (This is case sensitive.)
- **2.** Type and retype the new user's **password.** (*This is case sensitive.*)

Note: Passwords should be at least 6 characters and alpha-numeric.

- 3. Enter the user's First, Middle and Last Name and Date of Birth.
- **4.** Type any other information concerning the new user.
- 5. Choose the access* level this user will need under the Function Access** drop-down box.
- 6. If the user is a vaccinator or physician, click Yes under Clinical Roles.
- 7. Click the Save button.

B. To Inactivate a User:

Note: Inactivated users will still show as a vaccinator in the drop-down list unless their vaccinator role is changed to No.

- 1. Click on the user you want to inactivate from the drop-down list labeled New User.
- 2. When the user's information is displayed in the left hand fields, click on the Inactivate button.
- 3. Click the Save button.

C. To View Inactive Users:

1. Click the Show Inactive box.

2. Pull the drop-down list labeled New User.

D. To Reactivate an Inactive User:

1. Click on the Show Inactive button.

2. Pull the drop-down list labeled New User and select the user's name you would like to activate.

3. The user's information will be displayed in the left hand fields, click the **Activate** button.

* The USIIS Administrator may choose what access the user has by clicking in the corresponding radio buttons. ** The Function Access drop-down list is pre-programmed for your convenience.

R/O - Read only R/D - Read and Delete R/W - Read and Write R/D/W - Read, Delete and Write

Note: Access will not be given for any User until an original, signed User Confidentiality & Security Agreement has been received by the Utah Immunization Program. Please contact the Utah Immunization Program at (801) 538-9450 with any questions.

User Management

	Va	ccin	e Inv	entor	v
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- O All Inventory

C All Inver Current		ory	•	First Prev	1 of 2	٢	lext	Last	Inventory	Report
	Vaccin	I	Manuf		Exp.	No	Doses		VIS Version	
Lot Number	Code	Vaccine	ID	Manufacturer	Date	Doses	Left	VFC	Date	Dosage
1234	20	DTaP	PMC	SANOFI PASTEUR	05/17/2008	50	40	P	05/17/2007	0.50
12356	20	DTaP	WAL	WYETH-AYERST (I	10/28/2008	100	100	S	05/17/2007	0.50
2541225	20	DTaP	PMC	SANOFI PASTEUR	02/02/2009	20	20	P	05/17/2007	0.50
64537R	20	DTaP	PMC	SANOFI PASTEUR	01/01/2008	10	10	P	07/30/2001	0.50
;lkik;l	20	DTaP	MSD	MERCK AND CO.,	02/01/2008	50	40	V	03/08/2005	0.50
U0849CA	20	DTaP	PMC	SANOFI PASTEUR	01/01/2009	100	192	P	01/01/2004	0.50
HIB.jun4.06	17	HIB - UNSPECIFIE	TAL	TALECRIS BIOTHE	01/01/2008	100	100	P	06/04/2007	0.50
test.may7.07.HII	17	HIB - UNSPECIFIE	TAL	TALECRIS BIOTHE	01/01/2008	100	99	P	05/07/2007	0.50
Polio.jun4.07	10	IPV	TAL	TALECRIS BIOTHE	01/01/2008	100	100	P	06/04/2007	0.50
098iu	3	MMR	MSD	MERCK AND CO.,	01/01/2008	10	2	V	12/16/1998	0.50
ASDASDASD	3	MMR	MSD	MERCK AND CO.,	12/12/2008	100	99	P	12/12/1998	0.50
HepB.jun4.07	8	HEPATITIS B - PEC	TAL	TALECRIS BIOTHE	01/01/2008	100	99	P	06/04/2007	0.50
4584354	943	HEP B 2 DOSE AD	MSD	MERCK AND CO.,	01/01/2008	10	10	V	07/31/2001	1.00
MMR.jun4.07	100	(PCV7) PNEUMOC	TAL	TALECRIS BIOTHE	01/01/2008	100	100	P	06/04/2007	0.50
Penumo.jun4.01	100	(PCV7) PNEUMOC	TAL	TALECRIS BIOTHE	01/01/2008	100	98	P	06/04/2007	0.50
01568	21	VARICELLA	MSD	MERCK AND CO.,	01/01/2008	10	8	V	12/16/1998	0.50
4125	21	VARICELLA	SKB	GLAXOSMITHKLIN	03/26/2008	30	30	V I	01/01/2000	0.50
Valicera.jun4.07	21	VARICELLA	TAL	TALECRIS BIOTHE	01/01/2008	100	100	P	06/04/2007	0.50
321	31	HEPATITIS A - PEC	MSD	MERCK AND CO.,	08/01/2008	20	29	V	01/01/2002	0.50
HepA.jun4.07	31	HEPATITIS A - PEC	TAL	TALECRIS BIOTHE	01/01/2008	100	100	P	06/04/2007	0.50
123456	110	DTaP-HEP B-IPV	SKB	GLAXOSMITHKLIN	10/10/2009	10	10	P	07/30/2001	0.50

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Logout Change Pass. User Management	Inventory Inven. Adjust	Batch List	Report	Provider
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A. To View Current Inventory:

1. Current Inventory is displayed upon opening.

B. To View All Inventory (includes any vaccines previously entered):

1. Click the All Inventory button.

2. All inventory will be displayed.

C. To View Multiple Pages in Inventory:

1. Click the **First** button to see the beginning of the clinic's inventory.

- 2. Click the Last button to see the end of the clinic's inventory.
- 3. Click Prev or Next to change pages as needed.

D. To Print the Inventory:

1. Click Inventory Report.

2. Select the parameters for the report.

3. Click the Print or View button.

4. Print the report by clicking the print icon in the Adobe Acrobat toolbar.

E. To View or Edit a Specific Vaccine:

1. Click on the lot number.

2. The Inventory Adjustment screen will appear with the vaccine information.

F. To View Inventory by Vaccine Type:

1. Click drop-down box and select the vaccine type to display.

Note: Expiration dates shown in Blue indicate vaccine expiring within 90 days. Expiration dates shown in Red indicate vaccine has expired and should not be administered. Expired vaccines are automatically removed from the current inventory.

Inventory

Vaccine Inven	ntory Adjustment		•				
Lot Number:				Expiration Date:		New	
Manufacturer:			•	VIS Version Date:		Save	
Vaccine:			-	2nd VIS Date:		Reset	
Doses in Shipment:				3rd VIS Date:			
Doses Given:		Dosage: n	nL: Fui	nding Categories:	•	Delete	
Date Created:				Date Modified:			
Extra Doses:		Number of doses in (excess of what v	was said to exist in 1	the shipment.	<u></u>	
Under Doses:		Number of doses short of what was said to exist in the shipment.					
Shared Doses:		Number of doses shared or given to another provider.					
Wasted Doses:		Number of doses that has been wasted or otherwise deemed unusable.					
Other Adjustment:		It is not known why the computer inventory does not match actual inventory. Enter in an adjustment factor (+ or -) to bring the inventory into balance.					
Doses Left:							
		Extra Doses + Other Adjustment) MINUS (Doses Given + Under Doses + Shared					
Logout Change Pas	ss. User Managen	nent Inventory	Inven. Adjust	Batch List	Report	Provider	

A. To Enter a Vaccine into the Clinic's Inventory:

- 1. Click the New button to enter a new vaccine.
- 2. Enter inventory by filling in the Red (required) fields.
 - a. Lot Number of the vaccine.
 - **b.** Enter the Manufacturer by using the drop-down box or entering the manufacturer code.
 - c. Enter the Vaccine Type by using the drop-down box or entering the vaccine code.
 - d. Enter the number of doses received.
 - e. Enter the expiration date.
 - f. Enter the VIS Version Date. For a combination vaccine, enter all applicable VIS dates. (i.e. Comvax should have a VIS date for Hib and another for Hep B.)
 - g. Enter the Funding Category: VFC, Private or Special Projects.
- 3. Click the Save button to save the information to your inventory.
- 4. Repeat steps to enter another vaccine.

B. To Clear the Fields:

1. Click the **Reset** button to clear the vaccine information and begin again.

C. To Reconcile Inventories:

- 1. Click the Inventory tab to see a current inventory list.
- 2. Click on the vaccine lot number needing adjustment.
- Note: The Inventory Adjustment screen will appear with vaccine information.
- 3. Enter the number of doses needing to be corrected:
 - a. Use Extra Doses when your physical inventory has more than USIIS indicates.
 - b. Use Under Doses when your physical inventory has less than USIIS indicates.
 - c. Use Shared Doses when vaccine has been given to another provider.
 - d. Use Wasted Doses when a vaccine has been determined to be unusable (i.e. drawn up, then compromised).
 - e. Use other adjustment for any non-specific adjustment needing to be made.
- 4. When the Doses Left matches your physical inventory, click the Save button.

List Name:		_	Save Lis	t Delet	te List	Reset List	R	<mark>eset Criteria</mark>
Patient ID	First Name	Middle La:	st Name	DOB		Patients who got their last shot from your clinic/organization		
						The most re was given		ot date from your clir
						Between Ag or Between I	DOB:	ths) and
						Zip Co or Cou		•
						Random		
						Perform acti		
						 All Patient 		Checked Patients
Check All	Reverse Check	ed Und	heck All	Remove C	hecked		Export Report	Batch Forecast End Clinic Affil.

The Batch List can be used to create patient lists based on the criteria set by the user.

A. To Search for All Patients within a Specific Age Range:

- **1.** Enter either **Between Ages** (*in months*) or **Between DOB** for desired patients.
- 2. Click the Search button to run.
- 3. Patients meeting the criteria* selected will appear in the white fields to the left.

B. To Search for a Select Number of Patients within a Specific Age Range:

- 1. Enter either Between Ages (in months) or Between DOB for desired patients.
- 2. Enter the number of patients needed in Random #.
- 3. Click the Random button to run.
- **4.** Patients meeting the criteria* selected will appear in the white fields to the left.

C. To Save a List of Patients:

- 1. Enter a List Name.
- 2. Click the Save List button.

D. To Pull Multiple Forecasts for Patients:

- **1.** Create a patient list and save.
- **2.** Click to place a "V" next to patient ids that need a forecast.
- 3. Under Perform Action on List For, click the Checked Patients radio button.
- 4. Click the Batch Forecast button.
- 5. Adobe Acrobat will open in a separate window with a page for each patient forecast. Print the report by clicking the print icon in the Adobe Acrobat toolbar.

E. To Remove Selected Patients from your clinic:

Note: To consider a patient as no longer affiliated, the patient should not have been seen in the last year and had 3 failed attempts to contact.

- 1. Create a patient list and save.
- **2.** Click to place a "V" next to patient ids needing to be removed from the clinic.
- 3. Under Perform Action on List For, click the Checked Patients radio button.
- 4. Click the End Clinic Affiliation button.

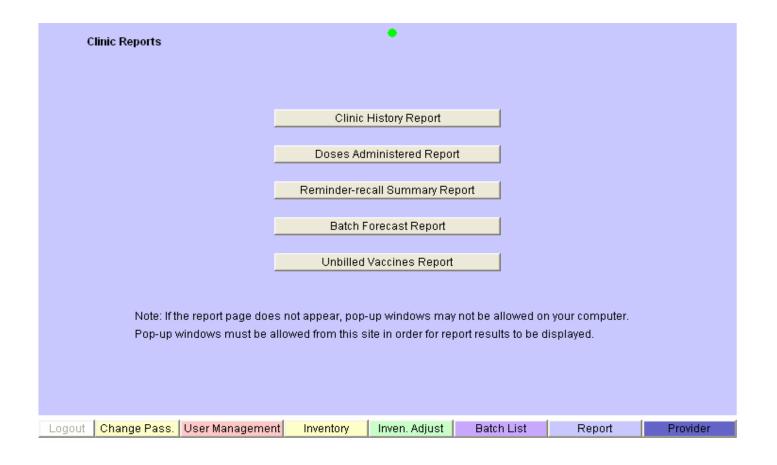
F. To Create a Reminder-Recall Report:

- **1.** Create a patient list and save.
- 2. Click the RR Export button.
- 3. A list of the reminder-recall parameters will appear.
- **4.** Choose your desired parameters to run a Reminder-Recall Report.
- **G.** To Export a Patient List for CoCASA (*Clinical Assessment Software Application*):
 - **1.** Create a patient list and save.
 - 2. Click the CASA Export button. A text file will appear with patients' information.

(CoCASA can be downloaded at http://www.cdc.gov/nip/cocasa/. Please contact the Utah Immunization Program for more information.)

* If more specific criteria is desired, last shot date, county and zip code may be selected.

Batch List



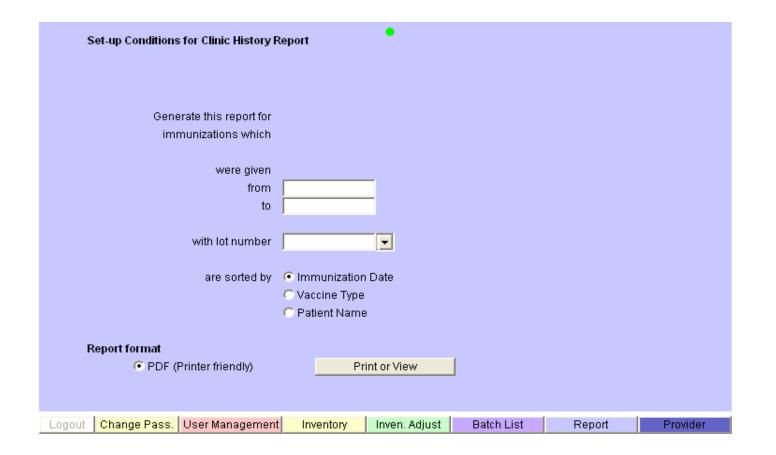
The Clinic Reports Screen has five reports available*:

- 1. Clinic History Report
- 2. Doses Administered Report
- 3. Reminder-recall summary Report
- 4. Batch Forecast Report
- 5. Unbilled Vaccines Report

*Adobe Acrobat Reader is required to view and print reports. If you do not have Acrobat Reader, please visit: <u>www.adobe.com</u> to download a free version of Acrobat Reader.

Note: Detailed information about each report is located on the following pages.

Clinic Reports



To Run a Clinic History Report

- **1.** In the **From** field, enter the date you want to begin the report.
- 2. In the To field, enter the date you want the report to end.
- 3. If looking for information about a specific vaccine, enter the lot number in the "with lot number" field.
- **4.** Select how you want the report sorted by clicking the appropriate radio button:
 - a. Immunization Date
 - **b.** Vaccine Type
 - c. Patient Name
- 5. Click on the **Print** or **View** button.
- **6.** Print the report by clicking the print icon in the Adobe Acrobat toolbar.

Doses Administered Reports: <u>Set-up Conditions for viewing, printing and/or submission of required or custom reports.</u> Select a criteria (custom date range OR specific quarter) to generate/submit the report for immunization which were:

Given:	Given in Quarter:					
	R C quarter 2 of 2007 C quarter 1 of 2007 C quarter 4 of 2006 C quarter 3 of 2006 C quarter 2 of 2006 A Quarter Doses Administered Report, required for all VFC Providers, will be electronically submited to the Utah Immunization Program the FIRST time the Submit to State button is pushed. A printable copy of the report will also appear. Sign					
Report format PDF (Printer friendly) Print or View Submit to State						
Logout Change Pass. User Management Inventory In	wen. Adjust Batch List Report Provider					

A. To Run a Report by Date Range:

- **Note:** Use of this report allows providers a method to evaluate doses administered activity for any combination of age groups over a selected time period.
- 1. In the From field, enter the date you want to begin the report.
- 2. In the **To** field, enter the date you want the report to end.
- **3.** Select the age groups to be included in the report by checking the box beside the age group. *(More than one can be selected.)*
- 4. Click on the **Print** or **View** button.

B. To Run a Report by Quarter:*

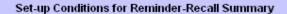
Note: When you select dates by quarter, you will be electronically submitting your Doses Administered Report to the Utah Immunization Program. In addition, ALL the age groups will automatically be submitted.

- 1. Select the Quarter you would like to view, submit and print.
- 2. Click the Submit to State button to send the report to the Utah Immunization Program.
- **3.** Enter the First & Last Name of the person submitting the report and a phone number.
- **4.** Adobe Acrobat will open in a separate window. Print the report by clicking the print icon in the Adobe Acrobat toolbar. **Sign** the report and **fax** it to the Utah Immunization Program at (801) 538-9440.
- 5. Keep a copy of the report for yourself.

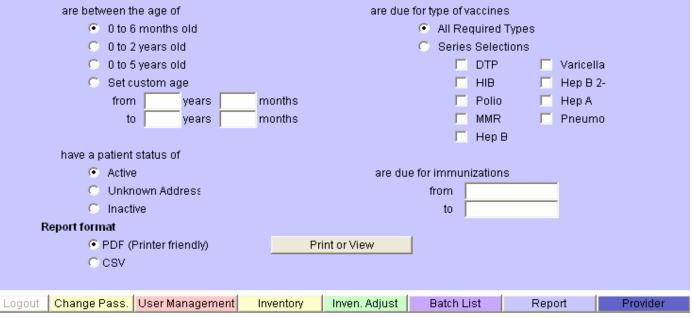
To Review Information Submitted at a Later Date:

- 1. Select the Quarter you would like to review.
- 2. Click on the **Print** or **View** button.

*Quarterly Doses Administered Reports are required for the Utah VFC Program. In order to submit the report, follow the above instructions for To Run a Report by Quarter, print out the report and fax a signed copy to the Utah Immunization Program at (801) 538-9440.







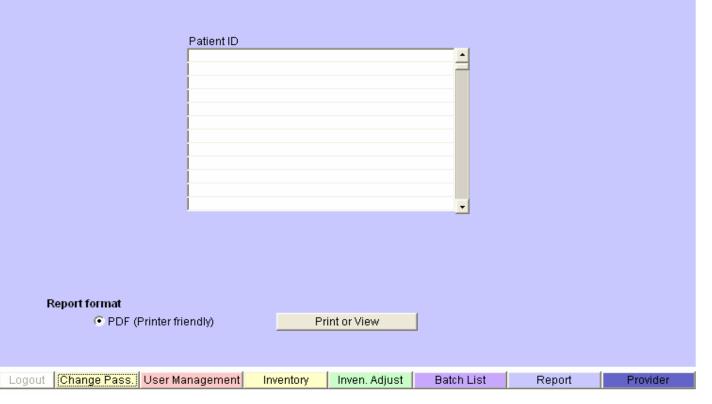
To Generate a Reminder-Recall Summary Report:

- **1.** Enter the age group by clicking in the appropriate radio button or by typing in the number of year(s) and month(s) old to select a custom age group.
- **2.** Select the appropriate patient status radio button.
- 3. Select PDF (printer friendly) or CSV (text file).

Note: A CSV file can be used to create spread sheets or labels.

- **4.** Select All Required Types to run a report for all vaccines for which the child is due OR select a specific vaccine type to search for children who are due/overdue for a certain vaccine.
- **5.** Enter the date range (future dates) by typing in the date to begin and end the report.
- 6. Click on Print or View button.
- **7.** Adobe Acrobat will open in a separate window. Print the report by clicking the print icon in the Adobe Acrobat toolbar.

Enter Patient ID for Batch forecast

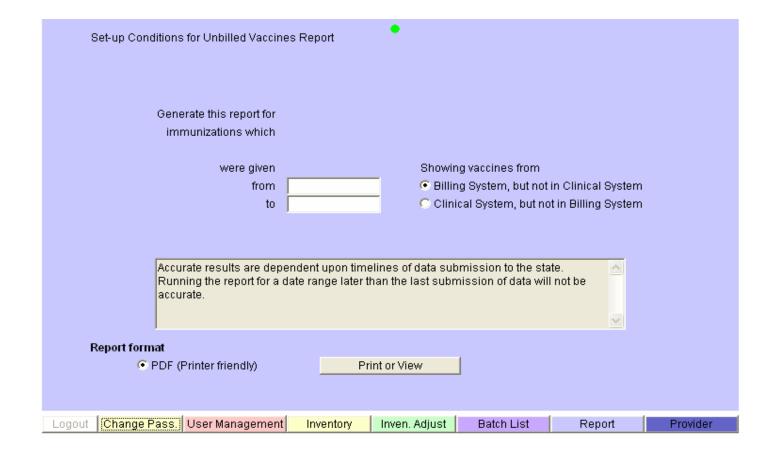


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To Pull Forecasts for Multiple Patients:

Note: Only patients that have been assigned a provider patient id in USIIS will be displayed for printing.

- 1. Click on the first line and type the Patient ID number. (Patient ID is case sensitive.)
- **2.** Tab or enter to go to the next line.
- 3. Enter the next Patient ID. Enter as many as needed.
- 4. Click the Print or View button.
- **5.** Adobe Acrobat will open in a separate window with a page for each patient forecast. Print the report by clicking the print icon in the Adobe Acrobat toolbar.



To Run an Unbilled Vaccines Report:

- **1.** In the **From** field, enter the date you want to begin the report.
- 2. In the To field, enter the date you want the report to end.
- 3. Choose 'Showing vaccines from" by selecting the radio button for either:
 - a. Billing System, but not in the Clinical System (USIIS).
 - **b.** Clinical System (USIIS), but not in the Billing System.
- 4. Click on the **Print** or **View** button.
- **5.** Adobe Acrobat will open in a separate window. Print the report by clicking the print icon in the Adobe Acrobat toolbar.



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