Updated 1/19/2012

Typical User Role

How to Search for a Client

1. Click **Manage Client** (located on the blue task bar on the left side of the screen)
2. Enter **Last name, First Name, and Date of Birth** or choose one of the other 2ways to search: **(1) Chart number or (2) Mother's Maiden Name and Client's DOB.**
3. Click **Find**

If your client is in the NCIR it will bring up their record. If there is more than 1 client found it will give you a list of similar entries. If your client is not in the NCIR it will say **"no clients found for the requested search criteria"** and you will need to enter them into the NCIR.

You can do this by clicking on the **Add This Client** button on the right side of the screen.

How to Enter a New Client

1. You must first search for a client to determine if they have a record in the NCIR. If you receive a message saying "no clients found for the requested search criteria" you click on **Add This Client** to enter the client into the NCIR.
2. Enter the following information:
   a. Last name
   b. First name
   c. Mother's maiden first name
   d. DOB
   e. Gender
   f. County of Residence
   g. Mother's maiden last name
   h. Chart Number (Organization specific)
   i. Status (always defaults to "Active")
   j. Ethnicity/Race
3. Click on **Responsible Persons** (gray tab in the middle of the page)
   - Complete as much information as possible for each individual *(min. requirements = name, relation, phone number and/or address)*
   - Make sure there is a check mark on the **Notices** box. If one is not there you can click in the box and it will create a checkmark.
   - Default for language is always "English" unless you select otherwise
   - Only one person entered on this screen should be clicked as "primary"; be sure that a primary person is designated
   - To add more than one person, click on **Next**
4. Scroll to the top of the screen and click **Save**

How to Enter Historical Doses

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Basic Functions

1. Search for your patient and bring up their record. (The patient must be in the system before you can add historical shots to their record)
2. Click on **History/ Recommend** *(Grey button on right side of the screen)*
3. Compare the current immunization record with what is in the NCIR and determine what historical shots need to be entered. Click on **Historical Immunization** (*located in the gray History bar in the middle of the page).*
4. Type the name of the Provider that administered the historical dose of vaccine in the open box next to the vaccine name, under the **Provider Organization** column.
5. Enter the date the shot was given in the small box next to the calendar. If needed you can enter a whole series of dates just continue across the row.
6. If it is not necessary to assign a Trade Name to the vaccine, then once you are finished entering the historical doses, click **Save and Submit.** (To see the different save options, refer to shortcut slides)
7. If you need to assign a trade name to a historical dose, once you have entered the Provider Organization and the date, click **Tradename Details.**
8. Once you click the **Tradename Details** button you will be taken to the screen where you can choose your Trade Name by clicking on the drop down box. When you are done click **Save**

When you click **Save and Submit** *(or **Save** from the **Tradename Details** screen)* you will be sent back to the main History/ Recommend screen. From here you can see the historical shot was loaded into the history.

Shortcut Functions

*By typing in the name of the provider that administered the historical immunization in the first open box under the **Provider Organization** column, you can copy and paste that name into subsequent boxes.*

1. Type in the Provider's name that gave the historical dose, in the top left box under **Provider Organization**
2. Now locate each vaccine that was administered by that provider and left click once in the open box under the Provider Organization column but next to the vaccine name- this will paste the text.
3. Type in the date that the historical dose was given in this first small date box.
4. Now locate each vaccine that was administered on that date and left click once in the open box next to the Provider Organization column that corresponds with the vaccine name- this will paste the text.
5. Click **Save and Submit** when finished

Save Functions

1. <u>**Save and Submit:**</u> This feature uploads all the historical information and returns you to the main **History/Recommend** screen.
*** This feature can be used when you have either the same provider for all historical shots or you have completed entering the client's history.*

2. <u>Save:</u> This feature allows you to save the historical information that you have entered, by loading it into the History portion of the screen above the entry grid, but not taking you away from the historical entry screen.
***This feature can be used when entering historical information from different provider's offices. For example if multiple providers gave a client their series of 5 DtaP shots then you could only enter those provider name's one at a time under the Provider Organization column, so you would want to use Save so that you would remain on this same screen after entering each provider and the corresponding shot. The same is true for the dates.*

Adding Other Historical Immunizations

1. The open drop down box at the bottom of the screen is for other immunizations that will have been given historically but are not seen on the screen. When you select a vaccine from the open drop down box it refresh the screen and will load that vaccine into the entry grid in alphabetical order.

How to Enter a New Immunization

Updated 1/19/2012

1. Search for your patient and bring up their record as previously instructed.
2. Click on **History/ Recommend**
    a. Review comments under "**Client Information**" at the top of the page and the "**Current Age**" in the blue bar about 2/3 of the way down the page
    b. Review the ACIP recommendation table below the age; recommendations are based on the ACIP schedule, the child's age, client comments, and vaccination history.
    c. Review vaccines selected (See checked boxes in '**Select**' column). To deselect any of these, click the checkmark to erase it. To add any vaccines, click in the box next to the vaccine name to add a checkmark. If you do not see your vaccine choice here you will have a chance to select additional vaccines on the next page by clicking in the **New** box next to the vaccine on the next page.
3. After making your vaccine choices, click **Add Selected.**
   *** you can also click the <u>New Immunization Entry</u> button in the middle of the screen and manually select the vaccines you want to administer. Either way (through <u>Add Selected</u> or <u>New Immunization Entry</u>) you will be directed to the same page.*
4. Under **Defaults for New Immunizations** complete the following;
    a. **Ordering Authority** (the doctor who signs your standing orders)
    b. **Administered By** (the clinician who is administering the shot)
5. Click **OK.**
6. If the **Eligibility as reported by Responsible Person** is not listed in the box above then you will need to choose the appropriate selection before administering the shots. This is the same choice that existed on the VAL forms
7. Choose the **Trade Name/ Lot Number** *(State Supplied vaccine is in blue and Private supply vaccine is in black)* and the **Body Site** for each vaccine that was selected.
8. The default **Route** will be listed if vaccine should only be given one way. However, if a vaccine can be administered more than one way, please choose the **Route** that it was given.
9. Click OK

*** As you select your trade name and lot number the most current date for each VIS will display on the bottom of the page. However, if another publication date is used you can click on the drop down box next to the date and select the correct date that was given*

How to Edit a Dose of Vaccine

1. To edit a dose of vaccine (including adding a vaccine reaction), click the **Edit** button next to the appropriate vaccine date on the **History/ Recommend** screen.
2. You can edit any of the items highlighted in blue or have a drop down box under **Edit Immunizations** and/or choose a reaction under **Reactions to Immunization.**

How to Print a Chart or Patient Copy of the Immunization Record

When you are back on the screen where the recommendations are listed, you can click on **Reports** on the gray **History** bar in the middle of the page.

1. For a **Chart Copy**, click on **Chart Copy** and then print it out.
2. For a **Patient Copy**, choose the **Site** and then click on **Patient Copy** and print it out.
3. If you need to print out a report without having entered immunizations:
    a. Search for your client
    b. When the record is displayed, click on **Reports** on the right hand side of the page (gray bar)
    c. From here choose either **Chart Copy** or **Patient Copy.**