Patient Search – Washington State Immunization Information System Quick Reference Guide – Patient Search

IIS Navigation Menu Diagram

The Navigation Menu is collapsible. Click on the bold Menu Heading (i.e. Main) to expand or collapse the Menu Heading.

The Navigation Menu, on the left-hand-side of the screen, contains all of the available options to move throughout the registry.

Patient Search Screen Diagram

Click the arrows to sort results by these fields

2 records were found. Notice the difference in the patient's birth date and guardian's (Grd) first name to select the appropriate patient.

Click the patient's name to select the patient.

Note: Searches are limited to a default of **10 results**, with options to increase to 25, 50 or 100 results on the top left of search results area. If you don't see the patient, use the scroll arrows on the bottom right, to see additional search results.

Search for a Patient

1. Using the Navigation Menu, click on the **Patient Menu Heading.**
2. Click *Search/Add*.
3. Enter the search criteria using the tips below.
4. Click **Search** or press **Enter**.
5. Select the patient from the search results to view the patient's demographic information. (See *Patient Search Screen Diagram*.)

Check the Vaccination Quick Reference Guide for steps to view a patient's immunization history.

SEARCH TIPS

Try searching by:
♦ Patient's first name, last name, and birth date
♦ First initial of the patient's first name and birth date
♦ First initial of the patient's last name and birth date
♦ Patient's first and last names without the birth date
♦ Chart Number - if the patient's chart number has been entered on the *Patient's Demographic Page*, it is possible to search for the patient by entering the chart number into the Chart Number field.

Other tips:
♦ All children born in Washington State are automatically put into the IIS via the birth record system
♦ Enter birth dates as a string of numbers, i.e. May 8, 2005 would be entered as 050805 or 05082005
♦ The maximum number of search results is 250 records. If you do not see your patient, redefine the search criteria and conduct another search.

Add a New Patient

Before attempting to add a new patient, search using several methods listed to avoid duplicate records.

1. From the *Search Page* click the "Check here if adding a new patient" checkbox at the bottom of the Patient Search fields (circled on the Patient Search Diagram – far left column).
2. Enter all of the REQUIRED information (highlighted in red): *First Name, Last Name, Birth Date, Guardian's first name or Mother Maiden's Name (we recommend using the Guardian's name only), and complete Mailing Address and Phone Number.*
3. Click **Search.**
4. A dialog box will appear with one of the following messages:
   • *Before adding, make sure the patient you want to add is not listed in the Patient Search Results.*
   • *This record already exists in the database. An exact match has been found.*

   Click **OK** to close the box.
5. If a possible match is found, select the patient. If the system finds an exact match, you will not be able to add a new patient record.
6. If no match is found click **Add Patient**. The system will go to the *Patient Demographic Page*.
7. Enter patient information into the appropriate fields. (see the other side of this quick reference guide for more information).
8. Click **Add Patient**.

Duplicate Patient Records

If you locate a duplicate patient record, click the **REPORT DUPLICATES** button and follow the directions on the screen or contact the Help Desk. Please note the IIS Patient ID numbers for **both** patient records and, if possible, which record to keep and which one to delete.

Questions? Contact the Help Desk: 800-325-5599 or 206-205-4141
Web Address: www.waiis.wa.gov email: iishelpdesk@kingcounty.gov

For persons with disabilities, this document is available on request in other formats. To submit a request, please call 1-800-525-0127 (TDD/TTY call 711)

WASHINGTON STATE IMMUNIZATION INFORMATION SYSTEM

Updated for version 5.13.11.1and above

Update or Edit a Patient's Demographic Record

The demographic screen is split into sections – this guide will cover the most used fields/sections of the demographic screen

1. Search for a patient.
2. Select the patient.
3. Click **Edit** (bottom of the *Patient Demographic screen*)**.**
4. Edit the needed fields on the *Patient Demographic Edit Page.*
5. Click **Save.**

First half of demographic edit screen

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Patient Demographic Edit Section

NOTE: If you wish to edit any field on the demographic page, the system will not let you submit your changes unless you have also supplied data for the following fields: *Gender, Guardian's First Name, Complete Mailing Address and/or Phone Number.*

- **Language:** Select English or Spanish to ensure that parents receive the health promotion mailing materials in the appropriate language.
- **Multiple Birth:** If the patient is a twin, triplet, etc. enter the birth order in the first dropdown and the total number of births in the second dropdown menu. I.e. for the second born of triplets enter 2 in the first field and 3 in the second field.
- **Inactivate Patients:** Use the Inactive dropdown menu to select the appropriate reason for inactivation. Once inactivated, the patient will no longer be tied to your organization, thus removing them from your Reminder- Recall, CoCASA and other reports.
- **VFC Status:** Select the patient's VFC status from the dropdown box in order to meet VFC documentation standards and run yearly VFC breakdown reports.

Address Section

Enter the following fields to update or enter the patient's address:

- Address 1: street or PO Box number
- Address 2: apartment number
- Enter the zip code and the correct city, state, and county will automatically populate for you
- Enter the phone number and email

Family & Contact Section - To add guardian info:

- Enter the first and last name
- Select the contact type from the dropdown menu
- If the contact person is a legal guardian, click the check box next to the word "Guardian?"
- The address information is optional, and can be added if the contact person has a different address than what is listed in the address section.
- Click the **Add** button to save the guardian's information. (you can edit this information by clicking the **Edit** button).

Second half of demographic edit screen

Alias Section – enter a nickname, maiden or second last names into these fields and you can then search by the alias name. Click the **Add** button to add.

Secondary Patient Demographics Section - these fields are optional and can be used if desired.

School Section – currently not available– do NOT use

Insurance Section - optional

Medical Home Facility Section– fields to consider:

- **Facility and Physician:** If you are a multi-facility or physician office, you can link a patient to a particular facility or physician by clicking on the appropriate name from the dropdown menu. This will allow you to run several reports (including Reminder/Recall, vaccine totals, etc.) by a particular facility and/or physician). This may be selected automatically.
- **Chart Number:** can be used as search criteria if added.

Do not take ownership of this record: If you add information to the demographic page or add vaccinations to a patient record and you do NOT want to change the patient ownership to your clinic, click on the check box next "Do not take ownership" on the bottom of the *Demographic Edit Screen.*