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 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.

**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.

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)

Updated for version 5.13.11 and 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

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.

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

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