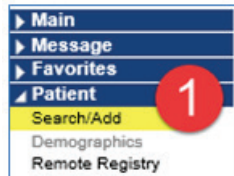


Search/Add Patients & Add Vaccinations

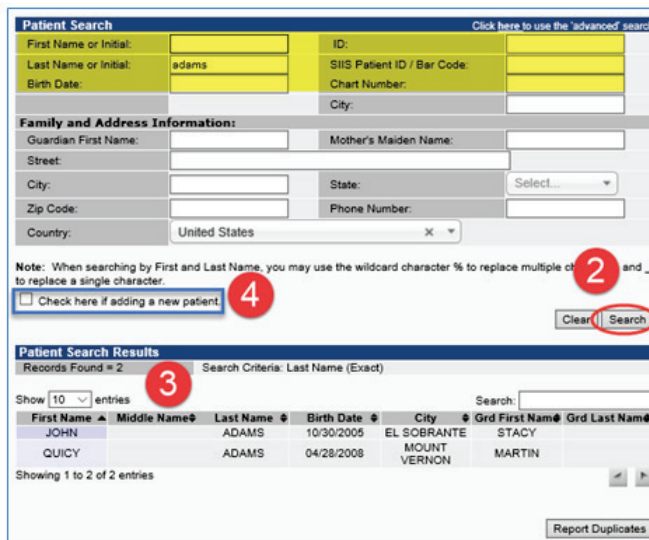
These instructions detail how to search for and add new patients, as well as how to view and add vaccinations. Note that users must have client (not view) access and be logged in under an organization and/or facility.

Search for a Patient

1. Click the **Patient > Search/Add** menu link.



2. Enter the search criteria and click **Search** (or press Enter). The search results display with sortable columns.
3. Locate the patient in the list and click on the row to view and/or edit the patient's demographic information.



Add a New Patient

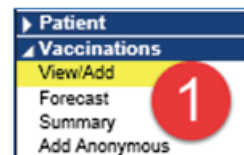
1. If the patient does not appear in the list, select the **Check here if adding a new patient** option. The Patient Search fields that a required change colors; enter at least the required information for the new patients and click **Search** again.
2. If the patient still does not appear in the list after the second full search, click the **Add Patient** button.

3. Enter the remaining required demographic information, including:
 - Patient Sex (Gender)
 - VFC Status
 - Social Security Number (if applicable)
 - Guardian information (in the Family & Contact section, enter the information and click **Add**)
4. Save the information. The patient is then entered into the system and can be viewed by users with appropriate access levels and permissions.

View/Add Vaccinations

Note that a patient must be selected in order to view and/or edit their vaccination history.

1. Click the **Vaccinations > View/Add** menu link.



2. The patient's vaccination page appears, displaying previously reported vaccinations. The notable items below are displayed in the following image:
 - The Vaccination Forecast section displays the patient's up-to-date, needed, and overdue vaccinations (A)
 - Click a vaccination date to view additional information (C)
 - Enter vaccination administration dates in the spaces next to the appropriate vaccines (D)
 - To add another vaccine, select it from the drop-down list (E)
 - Click **Add Administered** to add vaccinations given at your facility, or **Add Historicals** to add vaccinations given at another facility (F)

- If available, click the **Contraindications**, **Deferrals**, **Add Chickpox History** or **Add Smalpox History** button to add those to the patient's record.(G)

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

| Vaccine Family | Dose | Recommended Date | Minimum Valid Date | Overdue Date | Status |
|----------------|------|------------------|--------------------|--------------|------------|
| HEP-B 3 DOSE | 2 | 10/01/2007 | 06/29/2007 | 01/01/2008 | Past Due |
| POLO | 1 | 11/01/2007 | 10/19/2007 | 12/01/2007 | Past Due |
| FLU | 1 | 12/29/2008 | 12/29/2008 | 01/28/2009 | Past Due |
| VARICELLA | 1 | 12/29/2008 | 12/29/2008 | 01/28/2009 | Past Due |
| MMR | 2 | 09/01/2011 | 12/29/2008 | 09/01/2014 | Past Due |
| Tdap | 2 | 09/01/2014 | 09/01/2014 | 10/01/2014 | Past Due |
| MENINGOCOCCAL | 1 | 09/01/2018 | 09/01/2018 | 09/01/2020 | Up to Date |

Vaccination View/Add
(H- Historicals ; # - Adverse Reaction ; ! - Warning ; U - Unverified Historicals ; * - Compromised Vaccination)

Documented by: --select--

Double-click in any date field below to enter the default date: 07/24/2016

| Vaccine | 1 | 2 | 3 | 4 | 5 | 6 |
|-------------------------------|--------------|------------|---|---|---|---|
| DTaP | 01/01/2010 | | | | | |
| Hep B Ped/Adol - Preserv Free | 09/01/2007 H | | | | | |
| MMR | X 02/05/2008 | 12/01/2008 | | | | |
| Hb, unspecified formulation | | | | | | |
| Hb-Hep B | | | | | | |
| IPV | | | | | | |
| Pneumococcal PCV7 | | | | | | |
| Td (adult), adsorbed | | | | | | |
| Meningococcal MCV4P | | | | | | |
| varicella | | | | | | |

--select--

Add Administered **Add Historicals**

If a combination vaccine is used with a 'X', please verify which components of the vaccine are outside the ACIP schedule. Using the Vaccination Summary.

Add Chickpox History **Contraindications** **Deferrals**

- Enter the date the immunization was administered in the appropriate space (D). If entering multiple immunizations for the same day, enter the date in the Default Date field and then double-click on the date field next to the immunization. The default date is automatically inserted.
- To add details about the vaccine or immunization (i.e., lot number, manufacturer, anatomical site, etc.), click the date for that vaccine. On the Vaccination/Medicine Detail page, click **Edit Record**, enter the information, and click **Submit Changes**.

Of note on the Vaccination/Medicine Detail page, the lots must exist in the inventory in order to be used on this page.

- To add adverse reaction information, click the vaccination date and on the Vaccination/Medicine Detail page, click the **Add/Edit Adverse Reactions** button. Enter the information and click **Save and Continue**.

Edit/Delete Vaccinations

To edit or delete a vaccination, first search for and select the patient, then click the **Vaccinations > View/Add** menu link.

Administered vaccinations can only be edited or deleted by the organization that entered the immunization or by a registry (state) user. On the Vaccination View/Add page, click the date that is to be edited or deleted.

To edit the record, make changes on the Vaccination Detail page that opens and save them. Note that edits can be made for all fields except Immunization and Date Administered. If either of these fields needs to be edited, delete the immunization and re-enter it with the correct data.

To delete the record, click the **Delete Record** button on the Vaccination Detail page.

Historical immunizations can be edited or deleted by any user, regardless of the organization/facility that documented the immunization. Historical immunizations are indicated by an **H** in the IIS.

| Vaccine | | 1 |
|----------|------------|---|
| DTaP-IPV | 06/02/2015 | H |
| MMR | 09/12/2016 | |

To edit a historical record, click on the date. On the Vaccination Detail page that opens, make the changes and save them.

To delete the record, click the **Delete Record** button on the Vaccination Detail page.