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1 INTRODUCTION - MASS IMMUNIZATION MODULE

The Mass Immunization (MI) application module is used in the field to quickly conduct entry of patient demographic and vaccination information including inventory for dispensed medication gathered in mass immunization situations.

The application interface is optimized for speedy entry of an appropriately limited set of data elements. Reports, reminder/recall, and other assessments are conducted from the central registry once loaded with the field data.

Depending on access authorization, the following tasks can be performed:

- Search for patients
- Add patients
- Add vaccinations or medication distributions
- Setup the Vaccine Inventory
- Setup “Personal” defaults for patient, vaccine lot inventory, and automatic population of city, state, and zip code.
- Create/Edit patient demographics (first name, last name, address, city, state, etc.)
- Run/print reports
[This page left blank intentionally.]
2 ABOUT THE MASS IMMUNIZATIONS GUIDE

The Mass Immunization User's Guide was prepared for you to use as a reference book. It includes “step-by-step” instructions with illustrations that show you “how” to use the application.

DOCUMENTATION STANDARDS AND CONVENTIONS

The documentation standards and conventions used are:

- Menu names, options, and commands are printed in bold type and capitalized. For example—Point and click the **FILE** menu, and then select **SAVE**.

- Dialog boxes and application windows are enclosed in quotes with the first letter capitalized. For example—The “Physician/Vaccinator Maintenance ADD” window appears.

- Important notes are indicated with the word note and printed in bold italics. For example:
  
  If you do not see **ACCESS GRANTED**, you will need to re-enter an accurate **USERNAME** and **PASSWORD** in order to continue.

- Field names and descriptions are listed in consistent tables.

- Footers contain section number and page number.

- Alternating headers contain Title of the Guide, Section Name, and associated graphics.

- Text that is typed by an end-user appears in Courier font, so you can easily read it in the document. For example:

  *Lincoln Medical Center*
Every document includes a Table of Contents, an illustration of every application window, with an explanation of the window's purpose, and steps to navigate the window.

Every application guide includes tips on using the application, such as entering data into fields, keyboard and editing keys, and application characteristics (such as drop-down menus, radio buttons, checkboxes, etc.).

PRINTING THE GUIDE

This guide uses a double-sided layout; thus, prints properly when sent to a duplex (double-sided) printer.

REPORTING DISCREPANCIES IN THE GUIDE

If you should happen to find a discrepancy in the guide or the information is unclear, please call your local state help desk to fill out a Job Ticket.
3 ABOUT THE MASS IMMUNIZATIONS APPLICATION

This section describes the application characteristics that are used on all the windows and includes tips for entering text and using the keyboard and mouse.

APPLICATION CHARACTERISTICS

Common features on the application windows are described in the table.

Table 3-1: Application Characteristics

<table>
<thead>
<tr>
<th>APPLICATION CHARACTERISTICS</th>
</tr>
</thead>
<tbody>
<tr>
<td>MENUS / MENU OPTIONS</td>
</tr>
<tr>
<td>• Main</td>
</tr>
<tr>
<td>• Home</td>
</tr>
<tr>
<td>• Login</td>
</tr>
<tr>
<td>• Patient</td>
</tr>
<tr>
<td>• Vaccinations</td>
</tr>
<tr>
<td>• Job Queue</td>
</tr>
<tr>
<td>• Change Password</td>
</tr>
<tr>
<td>• Help</td>
</tr>
<tr>
<td>Every application will have a Menu displayed on the left side. Directly below the Menu Name are options that are available. If an option is &quot;grayed&quot; out, it is not an available option.</td>
</tr>
<tr>
<td>• A rotated triangle indicates the menu is open (illustrated on the Main menu).</td>
</tr>
<tr>
<td>• A triangle pointing right indicates the menu is closed.</td>
</tr>
<tr>
<td>• A square indicates a single menu without options.</td>
</tr>
<tr>
<td>Click on the triangle to open the menu to view its options and/or to close the menu. Click the square to open the menu.</td>
</tr>
</tbody>
</table>

DROP-DOWN MENUS

Drop-down menus are displayed when the drop-down menu arrow is clicked. A list of valid entries will appear in alphabetical order or the most frequently used order. While the menu is displayed, you may type the first letter of the word and the highlighter will position on the first occurrence. To locate the next occurrence, type the letter again.

MANDATORY FIELD ENTRIES

RED field labels indicate an entry is required before proceeding.

CHECK BOXES

Press the TAB key to move through the checkboxes. Press the keyboard SPACEBAR.
APPLICATION CHARACTERISTICS

(OR POINT AND CLICK) TO SELECT THE ITEM NEXT TO THE
CHECKBOX, OR PRESS IT AGAIN TO Deselect THE ITEM.

RADIO BUTTONS

PRESS THE TAB KEY TO MOVE TO THE DESIRED SET OF
RADIO BUTTONS. PRESS THE DIRECTIONAL KEYBOARD
ARROW (OR POINT AND CLICK) TO SELECT (HIGHLIGHT)
THE DESIRED RADIO BUTTON.

SEARCHES &
SELECT ARROW(S)

SELECT ARROWS APPEAR WHEN THERE IS A LIST OF
ITEMS TO CHOOSE FROM. THEY APPEAR AFTER A
SEARCH RESULT DISPLAYS. POINT AND CLICK IT TO SELECT
THE ITEM IT IS POINTING TO.

NOTE: WHILE EDITING, THE PATIENT’S RECORD WILL BE LOCKED FROM ANY OTHER
USER ACCESSING IT. REMEMBER TO “SAVE” WHEN FINISHED EDITING.

ENTERING DATA INTO THE FIELDS

When entering data into the fields, the following information in the table describes the recommended methods.

Table 3-2: Entering Data into the Fields

<table>
<thead>
<tr>
<th>ENTERING DATA INTO THE FIELDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>If the wrong type of data is entered into a field, an error message appears usually at the top of the window.</td>
</tr>
<tr>
<td>DATA STORAGE (UPPERCASE)</td>
</tr>
<tr>
<td>The application is not case-sensitive and data is stored (in the database) in capital (uppercase) letters.</td>
</tr>
<tr>
<td>DATES</td>
</tr>
<tr>
<td>The application pads the date fields with a forward slash (/) between month, day, and year. Dates can be entered in the following formats: mm/dd/yyyy mm/dd yy</td>
</tr>
<tr>
<td>SOCIAL SECURITY NUMBER</td>
</tr>
<tr>
<td>The application pads the social security number with the dash (-) in the appropriate places. You may enter the numbers without dashes; i.e., 123456789</td>
</tr>
</tbody>
</table>
ENTERING DATA INTO THE FIELDS

| PHONE AND FAX NUMBERS | The application pads the phone and fax numbers with parenthesis ( ) for the area code and a dash (-) between the three digit prefix and four digit suffix. You may enter phone and fax numbers without the dashes and parenthesis; i.e., #请您输入或删除
| ZIP CODES             | The application pads the zip code fields with a dash ( - ) if the entire 9-digit number is entered. Zip codes can be entered as 5-digits or 9-digits without the dash(es). |

**USING THE KEYBOARD AND MOUSE**

When using the keyboard and mouse, the following information in the table describes some suggestions.

Table 3-3: Keyboard, Editing Keys, and Mouse

<table>
<thead>
<tr>
<th>KEYBOARD, EDITING KEYS, AND MOUSE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TAB</strong></td>
</tr>
<tr>
<td><strong>SHIFT TAB</strong></td>
</tr>
<tr>
<td><strong>ENTER</strong></td>
</tr>
</tbody>
</table>

**Note:** The Cut, Copy, and Paste functions may work differently on some windows and/or computers. Try using different combinations to get the desired result.
<table>
<thead>
<tr>
<th>KEYBOARD, EDITING KEYS, AND MOUSE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CUT</strong></td>
</tr>
<tr>
<td>Highlight the data to be cut, then perform one of the following:</td>
</tr>
<tr>
<td>• CTRL + X</td>
</tr>
<tr>
<td>• Right-click the mouse and select Cut from the menu</td>
</tr>
<tr>
<td>• Select Edit from the toolbar and then select Cut</td>
</tr>
<tr>
<td>• Shift + Delete</td>
</tr>
<tr>
<td><strong>COPY</strong></td>
</tr>
<tr>
<td>Highlight the data to copy, then perform one of the following:</td>
</tr>
<tr>
<td>• CTRL + C</td>
</tr>
<tr>
<td>• Right-click the mouse and select Copy from the menu</td>
</tr>
<tr>
<td>• Select Edit from the toolbar and then select Copy</td>
</tr>
<tr>
<td>• CTRL + Insert</td>
</tr>
<tr>
<td><strong>PASTE</strong></td>
</tr>
<tr>
<td>Left-click the mouse where you want to place the data and perform one of the following:</td>
</tr>
<tr>
<td>• CTRL + V</td>
</tr>
<tr>
<td>• Right-click the mouse and select Paste from the menu</td>
</tr>
<tr>
<td>• Select Edit from the toolbar and then select Paste</td>
</tr>
<tr>
<td>• Shift + Insert</td>
</tr>
<tr>
<td><strong>SCROLL MOUSE</strong></td>
</tr>
<tr>
<td>The scrolling mouse wheel can be used to scroll through selected drop-down lists and current web page, if the mouse is programmed correctly.</td>
</tr>
</tbody>
</table>
**PREREQUISITE TO LOGGING IN – ENABLING SETTINGS**

The following settings should be set before you log into the IWEB Application.

- **ENABLE** your browser to **ACCEPT COOKIES & SCRIPTING**.
- **DISABLE** your browser for **POP-UP BLOCKER**.

**ENABLING/AcCEPTING COOKIES & SCRIPTING**

To enable the **COOKIES** and **SCRIPTING**, perform the following:

1. Click on **TOOLS | INTERNET OPTIONS**… and then click the **PRIVACY** tab. The “Privacy” settings appear.

   ![Figure 3-1: Internet Options / Privacy Tab](image)
2. To enable the **COOKIES**, slide the slide-bar to change the “Settings” from Medium-high to Medium.

3. Click the **SECURITY** tab. The “Security Settings” appear:

   ![Figure 3-2: Internet Options / Security Tab](image)

4. Click the **CUSTOM LEVEL**… button. The “Security Settings” window appears:
5. Slide the slide-bar (located on the right side of the window) down until you see the setting for **SCRIPTING**.

**Figure 3-4: Security Settings / Scripting of Java Applets**
6. If the **ENABLE** radio button is not selected, click it to select/enable it.

7. Click the **OK** button. The “Internet Options – Security” window reappears.

8. Click the **APPLY** button to apply the new settings and then click the **OK** button.

**DISABLING POP-UP BLOCKER**

To block Pop-Ups even if they are launched when you click a link or button on a Web site, perform the following:

1. Open the Internet Explorer Browser.

2. On the **TOOLS** menu, point to Pop-up Blocker, and then click Pop-Up Blocker Settings.

3. Select the **HIGH** setting in the box near the bottom of the dialog box.

**Note:** If you want to see Pop-ups that are blocked when you have this settings turned on, hold down the **CTRL** key while the window opens.

**USING POP-UP BLOCKER IN IE (SERVICE PACK 2)**

When installing Service Pack 2, Microsoft’s Pop-Up Blocker is turned on by default in Internet Explorer and set to the medium setting, which means it will block most automatic pop-ups.

The default settings for the Pop-Up Blocker allow you to see pop-ups that are opened when you click a link or button on a Web site. Pop-Up Blocker will also play a sound and show the Information Bar when a pop-up is blocked. You can adjust these settings so that Pop-up Blocker works the way you want it to.
CHANGING POP-UP BLOCKER SETTINGS

To change the Pop-Up Blocker Settings, perform the following:

1. Open internet Explorer. On the Tools menu, point to Pop-up Blocker, and then click Pop-up Blocker Settings.

   Figure 3-5: IE Tools Menu / Pop-up Blocker

2. If you want to see Pop-Up windows from a specific Web site, type the address (or URL) of the site in the field labeled, “ADDRESS OF WEB SITE TO ALLOW” and then click the ADD button (illustration shown below).

   Figure 3-6: Pop-Up Blocker Settings
ALLOWING A SITE TO DISPLAY POP-UPS TEMPORARILY

To allow a site to display Pop-ups temporarily, perform the following:

1. Click the Information Bar when it notifies you that a “Pop-Up has been blocked.”

2. Click the option TEMPORARILY ALLOW POP-UPS option.

BLOCKING POP-UPS WHEN LAUNCHED

To block Pop-Ups even if they are launched when you click a link or button on a Web site, perform the following:

1. Open the Internet Explorer Browser.

2. On the TOOLS menu, point to Pop-up Blocker, and then click Pop-Up Blocker Settings.

3. Select the HIGH setting in the box near the bottom of the dialog box.

Note: If you want to see Pop-ups that are blocked when you have this settings turned on, hold down the CTRL key while the window opens.

TROUBLESHOOTING POP-UP BLOCKER

If you have installed SP2 and you still see Pop-Ups in Internet Explorer, try these solutions below:

1. Make sure Pop-Up Blocker is turned on.
   - Pop-up Blocker is turned on by default, but someone may have turned it off.
2. Turn on Pop-Up Blocker, by performing the following:
   - On the **TOOLS** menu, point to Pop-Up Blocker.
   - Click the **TURN ON POP-UP BLOCKER** option.
4 MASS IMMUNIZATIONS MAIN MENU

The Main Menu offers the following options and may differ depending on the application/module being used:

- Home
- Login
- Logout
- Select Application
- Select IRMS
- Select Facility

Once you click the **LOGIN** option and the “STC Web Login” window appears, you can login with a valid username/password, request access (username and password) to the application, or request a new password.

**LOGGING IN**

The **LOGIN** option begins the process of logging in to the application. The process is as follows:

- Start the Browser.
- Log in to the application.
- Accept a Confidentiality Agreement (if enabled by the administrator)

**Note:** When a Username and Password are created, it is assumed this information is to be kept confidential.
If you are an IRMS CLIENT user, a facility selection can be used to limit your lot number selection when administering shots and will appear when you log in.

1. Open up your Internet Explorer (IE) and enter the web address for your state's immunization web site. For example:

   https://www.massimmunization.com

   The “Welcome to the State Immunization Information System (SIIS)” window appears.

   **Note:** This window is also referred to as the “Home” window. It appears when the HOME option is clicked.

   **Figure 4-1: Welcome Window - Home**

2. Locate the MAIN menu on the left side of the window’s SideBar and point and click on the LOGIN option. One of two windows may appear depending on whether you have been granted application access.

   - If you have NOT been granted access and need to request application access, the “Request Access for an Application” window appears. Refer to the section titled, “Request Access” for instructions.
If you have been granted access, the “Web Login” window appears with the mouse pointer positioned in the username field.

Figure 4-2: Web Login

3. If configured for your state, two hyperlinks may appear below the “Password” field.

   - **REQUEST ACCESS** to obtain a username/password, and
   - **FORGOT PASSWORD** to send an email request for a password reset.

4. Refer to their respective sections in this chapter for instructions.

5. The fields and their descriptions are listed in the table:

   Table 4-1: STC Web Login Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>USERNAME</td>
<td>This is your login id that allows you to access the application.</td>
</tr>
<tr>
<td>PASSWORD</td>
<td>This is your confidential password that is associated with the Username and allows you to access the application.</td>
</tr>
</tbody>
</table>
6. Type your **USERNAME**, press the **TAB** key, and then type your **PASSWORD**.

7. Press one of the available buttons:
   - **CLEAR** – to erase text from the data fields.
   - **ENTER** (or click the **LOGIN** button) – to process the information.

8. Depending on your User Permissions and enabled state-configurable settings, one of several windows may appear.
   - **Confidentiality Agreement** – Continue to the section titled, “Accepting/Declining the Confidentiality Agreement.”
   - **Select Facility** – Continue to the section titled, “Selecting a Facility.”
   - **Select IRMS** – Continue to the section titled, “Selecting an IRMS.”
   - **Select VFC PIN** – Continue to the section titled, “Selecting a VFC PIN.”
   - **Select Application** – Continue to the section titled, “Selecting an Application.”
   - **Password Warning** – Continue to the chapter titled, “Changing Password” for instructions.
   - **Access Denied** – Indicates an incorrect username and/or password was entered. This is a state-configurable administrative option that sets the number of times a user can fail to login properly along with a set time duration. Repeat the above steps beginning with Step 6.
Figure 4-3: Access Denied

- **Patient Search** – Indicates a correct username and password were entered. Continue to the section titled, “Mass Immunizations Patient Menu” for instructions.

9. If you do not see the “Patient Search” screen or you have forgotten your username and/or password, you can click on the **Forgot Password** link if your state uses it, or contact your administrator for a new Password.

**Note:** Depending on your access authorization, different menus and options may be available. Available options display in **bold** lettering, unavailable options display in gray.

**REQUESTING ACCESS**

This option is used to request access to the application.

To request access to the application, perform the following:

1. Click on the **REQUEST ACCESS** hyperlink. The “Request access to this application” window appears.
2. The fields and their descriptions are listed in the table:

Table 4-2: Request access to this application Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>FIRST NAME</td>
<td>Type your first name. This is a required field.</td>
</tr>
<tr>
<td>MIDDLE NAME</td>
<td>Type your middle name (optional).</td>
</tr>
<tr>
<td>LAST NAME</td>
<td>Type your last name. This is a required field.</td>
</tr>
<tr>
<td>STREET</td>
<td>Type the street address (optional) of the location where you will be using the Username.</td>
</tr>
<tr>
<td>CITY</td>
<td>Name of the city where you will be using the username.</td>
</tr>
<tr>
<td>STATE</td>
<td>Click the drop-down menu arrow to select the state name of the location you will be using the username. After a STATE is selected, the “Select Zip Code” dialog box appears. Locate the appropriate zip code and click the SELECT button.</td>
</tr>
</tbody>
</table>
| ZIP            | Zip code of the location where you will be using the username. After a STATE is selected, the “Select Zip Code” dialog box appears. Locate the appropriate zip code and click the SELECT button. The zip code will automatically populate the ZIP field. **Note**: The “Select Zip Code” dialog box will reappear when the City/State fields have been
<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>edited and more than one zip code exists for the City. If only one zip code exists for the city, it will automatically populate the field.</td>
<td></td>
</tr>
<tr>
<td>COUNTY/PARISH OR BOROUGH/CENSUS</td>
<td>Click the drop-down menu arrow to select a County or Parish/Borough or Census.</td>
</tr>
<tr>
<td>WORK PHONE</td>
<td>Phone number where you will be using the username.</td>
</tr>
<tr>
<td>EXT</td>
<td>Extension number at the location where you will be using the application.</td>
</tr>
<tr>
<td>EMAIL</td>
<td>Email address where your username and password can be sent.</td>
</tr>
<tr>
<td>IRMS</td>
<td>Click the drop-down menu arrow to select your IRMS identifier.</td>
</tr>
<tr>
<td>FACILITY</td>
<td>Click the drop-down menu arrow to select your FACILITY.</td>
</tr>
</tbody>
</table>

3. At a minimum, fill in the “RED” labeled fields. It is recommended that you enter as much information as possible.

4. Click one of the available buttons:
   - **CLEAR** – erases any data from the fields and remains on the same window.
   - **ADD** – submits your request and re-displays the “Welcome to the State Immunization Information System (SIIS)” window with a message at the top of the window confirming your request. You will be notified via email of your request.

**RESETTING PASSWORD - FORGOT PASSWORD**

The “Forgot Password” option is a hyperlink that is state configurable by your System Administrator. It is used when you do not remember your password. You can click on this hyperlink and request a new password be sent to you.

This state configurable option allows an email to be sent to the state’s Help Desk when a user clicks on the “Forgot Password”
hyperlink. When the hyperlink is clicked, a dialog box appears prompting the user to enter their information (name, username, phone number and e-mail address). Once the information is entered and the SEND button is pressed, an e-mail message is sent to the Help Desk with a subject line of “Request Password Reset.” The settings that allow this to occur are:

- Properties – Registry Settings - Enable Forgot Password link to email help desk to reset the password
- Settings – Password Rules – Show Forgot Password Link (must be enabled).
- Additionally, an email address must be associated to your username, as well as in the Administration – Properties – Email Settings – Address for the Help Desk.

If you have forgotten your password and need to request a new one, perform the following:

1. Click the FORGOT PASSWORD link. The “Forgot Password” window appears.

2. Type one of the following
   - USERNAME – type your username. If you type your username, your new password will be emailed to your email address on file.
   - EMAIL – type your email address. If you type our email address, your new password will be emailed to this email address versus the one on file.

3. Click the SEND button. The system will generate an automatic and immediate response and reply to your
request by sending the new password in an email (similar to the one shown below).

**Figure 4-6: New Password Assignment Email Reply**

<table>
<thead>
<tr>
<th>From: <a href="mailto:do-not-reply@stchome.com">do-not-reply@stchome.com</a></th>
<th>To: <a href="mailto:menu_notify@stchome.com">menu_notify@stchome.com</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>07/07/2004 03:04 PM</td>
<td>To: <a href="mailto:menu_notify@stchome.com">menu_notify@stchome.com</a></td>
</tr>
<tr>
<td></td>
<td>From: <a href="mailto:do-not-reply@stchome.com">do-not-reply@stchome.com</a></td>
</tr>
<tr>
<td></td>
<td>Subject: New STC password</td>
</tr>
</tbody>
</table>

Your password has been changed. Your new password is ECMLNJ.

4. Log in to the application using the **NEW PASSWORD**.

5. From the Menu, click on the **CHANGE PASSWORD** hyperlink (also state configurable) to change your password to what you want it to be. The “Change Password” window appears. Continue to the chapter titled, “Change Password” for instructions.

**SELECTING AN APPLICATION**

This option is used when a user needs to switch between different applications.

*Note:* The default application is set using the **SETTINGS** menu, **Personal** option, **User Preferences** section, default application setting.

To select a different **APPLICATION**, perform the following:

1. From the **MAIN** menu, click on the **SELECT APPLICATION** option. The “Select Application“ window appears:
2. Click on the drop-down menu arrow to view/select the desired application.

3. Click on the **SUBMIT** button. The “chosen” application’s “Welcome” window appears.

   - When the Mass Immunizations application is selected, the “Patient Search” window appears. Continue to the section titled, “Mass Immunizations Patient Menu” for instructions.

### SELECTING A FACILITY

The “Select Facility” window may appear immediately after logging on but is an option that is available from the **MAIN** menu to allow you to switch to a different facility.

1. When the “Select Facility” window appears, click the drop-down arrow to select a Facility and then click the **CONTINUE** button or click the **CANCEL** button to not select a facility and assume the Client access privileges.

   **Note:** A facility is used to limit your lot number selection when administering shots. The chosen Facility name will appear at the top of the window after the chosen IRMS.
SELECTING AN IRMS

This option is used when you need to switch from one IRMS to another and do not want to logout of the application.

To select a different IRMS, perform the following:

1. From the **MAIN** menu, click on the **SELECT IRMS** option. The “Select IRMS” window appears.

   ![Figure 4-9: Select IRMS](image)

2. In the **IRMS** field, click the drop-down menu arrow to view/select a valid choice.

3. Click the **CONTINUE** button. The “Patient Search” window appears. Continue to the desired section.

   **Note:** The name of the application and the chosen IRMS name will appear at the top of the window followed by the chosen Facility (separated by a slash (/)).

   ![Figure 4-10: Selected IRMS and Facility](image)
ACCEPTING/DECLINING THE CONFIDENTIALITY AGREEMENT

If your state has elected to enforce users to accept or decline the Confidentiality Agreement, the “Confidentiality Agreement” window will appear.

Figure 4-11: Confidentiality Agreement

1. Read the **Title** and **Agreement** areas of the window.

2. In order for you to continue to use the application, you will need to click the **ACCEPT** or **DECLINE** buttons.

   - **ACCEPT** – inserts your username and date into a database table to keep a log of your acceptance, and will display the next window in the login process. If the confidentiality agreement is updated, you may need to accept it again.
   - **DECLINE** – logs you off the application and displays the “STC Web – Invalid Session” window.
Access is granted if the **USERNAME** and **PASSWORD** are accurate. The “Patient Search” window appears.

If the administrative setting has been set to warn you that your password will expire in one week, the “Change Password” window appears.
Figure 4-14: Change Password

- If an invalid Username and Password are entered, the “Access Denied” window appears.

Figure 4-15: Access Denied

a) Click on the TRY AGAIN hyperlink and re-enter a valid Username and Password.

3. Continue to the section titled, “Patient Search” for instructions.

LOGGING OUT

When you are finished using the application, you should logout.

1. From the MAIN menu, point and click on the Logout option. A dialog box appears indicating to close the browser if you are finished.
2. Click the OK button. Another dialog box appears.

Figure 4-17: Close the Browser Window

3. Click the YES button to close the browser window. The application and browser window are completely logged off.
5 MASS IMMUNIZATIONS SETTINGS MENU

When the application is set up, there are some pre-setup options included that are set by the system administrator. For example, verbiage on the patient's medication/vaccination windows can either display vaccination/vaccine, medication/med, or a combination. Additionally, the system administrator will setup the types of vaccine/medications that will display within the application. Contact your system administrator if you have questions regarding the application setup.

The SETTINGS menu provides a method to set up defaults that will expedite the data entry process by automatically populating drop-down menus and/or fields for all of the applications listed in the “Select Application” menu (Standard = Iweb Core, First Responder, and Mass Immunizations, etc.).

Note: This guide is specifically for the Mass Immunizations application.

The Settings menu has two options:

- Personal
- Facility (If you are a Registry Client, IRMS Client, or Facility Client with the “Default Vaccination Management” permission.)

Your permissions determine the categories that will appear.

MASS IMMUNIZATIONS PERSONAL SETTINGS

Personal settings are used in various places of the application by allowing some of the data fields to automatically fill; thus, saving data entry time. There are six categories of PERSONAL default settings shown in the illustration below.
When a checkbox appears directly above the Patient Settings, it appears for the Registry Client, IRMS Client, and Facility Client Users that have the permission “Default Vaccination Management” set up. This permission allows Facility Settings to be established for an entire Facility. Refer to the section titled, “Facility” within this chapter for more information. Clicking this checkbox overrides those settings.

Figure 5-1: Personal Settings

The Personal Settings automatically populate the data fields primarily on the Patient Demographic and Vaccination windows.

There are different types of hyperlinks to the right of the “Settings” categories. Point and click the hyperlinks to activate the option:

- “Click to update” or “click to add”
- “Update/delete” or “update”

MASS IMMUNIZATIONS PATIENT DEFAULT SETTINGS

The Patient Defaults settings will automatically populate the fields on the “Patient Demographics Edit” window.
**ADDING/UPDATING MASS IMMUNIZATIONS PATIENT DEFAULTS**

To add or update Patient Defaults, perform the following:

1. From the **SETTINGS** menu, point and click on the **PERSONAL** option. The “Personal Settings” window appears.

2. In the Patient Defaults section, point and click on the “**click to update**” hyperlink. The “Patient Defaults Update” window appears.

   ![Figure 5-2: Mass Immunizations Patient Defaults](image)

3. The fields and their descriptions are listed in the table:

   **Table 5-1: Mass Immunizations Patient Defaults Field Descriptions**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>CITY</td>
<td>Default name of the City that will automatically populate the application windows containing this field.</td>
</tr>
<tr>
<td>STATE</td>
<td>Default name of the State that will automatically populate the application windows containing this field.</td>
</tr>
</tbody>
</table>
   | ZIP CODE    | Default number for the Zip Code that will automatically populate the application windows containing this field. **Note**: The “Select Zip Code” dialog box will reappear when the City/State fields have been edited and more than one zip code exists for the City. If only
### FIELD | DESCRIPTION
--- | ---
one zip code exists for the city, it will automatically populate the field. | 
**PHONE AREA CODE** | Default number of the Area Code that will automatically populate the application windows containing this field. |
**CAMPAIGN** | Appears for the Mass Immunizations Application. When using Campaigns, the Tier must be created by the System Administrator first followed by the creation of the Campaign. Refer to the Registry Applications User Guide - Administration Menu for details. Name of the Campaign associated with the Mass Immunizations. Examples of Campaigns are:  
- 2008 CDC Exercise  
- Pan Flu (STC automatically provides this campaign)  
**Note:** A patient can be associated to multiple campaigns but only one immunization can be associated per Campaign/Tier. If a second shot is provided in a subsequent Tier, then the patient gets moved to the subsequent Tier and the first shot stays in Tier 1.  
Click the drop-down menu arrow to select the Campaign. 
**Examples of scenarios with Personal Settings.**  
**Scenario 1:** User has Campaign set in Personal Settings (the behavior is the same regardless of whether campaign is required). When the user goes to the MI Demographic / Vaccination page, the vaccines that display are the vaccines from the default Campaign. If the user selects a different Campaign, the list of vaccines changes to the vaccines for the new Campaign. The vaccines display as checkboxes versus the drop-down list.
Mass Immunizations Settings Menu

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scenario 2: Campaign is required and Campaign is not set in Personal Settings. When the user initially comes to the page, no vaccines are displayed and the drop-down list is not displayed. When the user changes a Campaign, the list of vaccines changes to the vaccines for the new Campaign. The vaccines display as checkboxes versus the drop-down list.</td>
<td></td>
</tr>
<tr>
<td>Scenario 3: Campaign is not required and Campaign is not set in Personal Settings. When the user initially comes to the page, the vaccines from “Config Vaccines” are displayed and the drop-down list of other available vaccines is displayed. When the user changes a Campaign, the list of vaccines changes to the vaccines for the new Campaign. The vaccines display as checkboxes versus the drop-down list. If the user deselects the Campaign, the list from &quot;Config Vaccines&quot; returns as does the drop-down box of other available vaccines.</td>
<td></td>
</tr>
</tbody>
</table>

4. Fill in the desired fields and click one of the buttons:
   - **CANCEL** – to NOT save and return to the “Personal Settings” window.
   - **RESET** – to erase any newly entered text, redisplay the previous data, and remain on this window.
   - **SAVE** – to save and return to the “Personal Settings” window.

**Mass Immunizations Vaccination Default Settings**

The Vaccination Defaults include the name of the vaccinator and facility.
**ADDING/UPDATING MASS IMMUNIZATIONS VACCINATION DEFAULTS**

To add or update Vaccination Defaults, perform the following:

1. In the **Vaccination Defaults** section, point and click on the “**click to update**” hyperlink. The “**Vaccination Defaults Update**” window appears.

   ![Figure 5-3: Vaccination Defaults Update](image)

2. The fields and their descriptions are listed in the table:

   **Table 5-2: Vaccination Defaults Field Descriptions**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
   | VACCINATOR  | Default name of the Vaccinator that will automatically populate the application windows containing this field.  
   **Note:** If using Mass Immunizations with Iweb Core, this default will appear in both applications. |
   | FACILITY    | Default name of the Vaccinator’s Facility that will automatically populate the application windows containing this field.  
   **Note:** If a Facility Display (Abbreviated) Name was entered for the facility, it will appear in the list as opposed to the full name of the facility. |
   | DEFAULT DATE| Default date of the Vaccinations that will automatically populate the vaccination entry windows containing the “Default Date” field. This date will last until it is changed; however, the default date can be changed at the time of vaccination. |
   | SERVICE TYPE| (State Configurable Option; used by |
Mass Immunizations Settings Menu

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Louisiana) Default name that will appear on the Vaccination View/Add, Edit and Details windows each time the user logs on.</td>
<td></td>
</tr>
</tbody>
</table>

3. Fill in the desired fields and click on one of the buttons:
   - **CANCEL** – to NOT save and return to the “Personal Settings” window.
   - **RESET** – to erase any newly entered text, redisplay previous date, and remain on this window.
   - **SAVE** – to save and return to the “Personal Settings” window.

**MASS IMMUNIZATIONS LOT DEFAULT SETTINGS**

A “state configurable” option for a **Facility Inventory Manager** can be setup for a facility to allow facility-wide lot number defaults to be used. If a user does NOT have Lot Number defaults set up in their Personal Settings, the Inventory Manager’s defaults will be used; however, if the user DOES have Lot Defaults setup in their Personal Settings, the Facility Inventory Manager’s settings will not override them.

**Note:** A script has been added for all users whose IRMS/Facility has H1N1 inventory with a lot number personal setting for H1N1. This script will be run each time inventory is loaded from the McKesson file. If the user already has a personal setting for the H1N1 lot, then another one will be added so that they can select the correct lot from the radio buttons in Mass Immunizations. If the user belongs to a facility and the inventory is at the IRMS-level, the personal setting will not be created.
ADDING/UPDATING MASS IMMUNIZATIONS LOT DEFULTS

To add/update lot defaults, perform the following:

1. In the **Lot Defaults Add/Update** section, point and click one of the hyperlinks:
   - “**click to add**” hyperlink if you are adding a new Lot Default.
   - “**update**” if you are editing an existing Lot Default.

The “Lot Defaults Add/Update” window appears.

   ![Lot Defaults Add/Update Window](image)

   **Figure 5-4: Mass Immunizations Lot Defaults Add/Update**

2. The fields and their descriptions are listed in the table:

   **Table 5-3: Mass Immunizations Lot Defaults Field Descriptions**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>VACCINE DESCRIPTION</strong></td>
<td>Default name of the Vaccine that you are setting Lot defaults for that will automatically populate the application windows containing this field. Click the drop-down menu arrow to view a list of vaccine.</td>
</tr>
<tr>
<td><strong>MANUFACTURER</strong></td>
<td>Default name of the Vaccine Manufacturer that you are setting Lot Defaults for that will automatically populate the application windows containing this field.</td>
</tr>
</tbody>
</table>
## Mass Immunizations Settings Menu

### FIELD | DESCRIPTION
--- | ---
Click the “Click to Select” hyperlink to display the “Select Lot Number” window with a list of valid choices.

![Select Lot Number Window](image)

**Note**: This list will change depending on the Vaccine chosen. In the window below, DTaP was the chosen Vaccine.

While on the “Select Lot Number” window, click on one of the buttons:
- **SELECT ARROW** beside the Manufacturer you desire. You will return to the “Lot Defaults Add/Update” window with your selection imbedded into the corresponding field(s).
- **CANCEL** to return to the “Lot Defaults Add/Update” window with your data remaining in the fields.
- **CLEAR** to return to the “Lot Defaults Add/Update” window with the data fields erased.

### LOT NUMBER
Manufacturer’s Lot Number chosen when the “Select Lot Number” window appeared and a choice made.

**Note**: Only one lot is allowed per vaccine or an error message will appear.

### EXPIRATION DATE
Date the Lot will expire.

### LOT FACILITY
Manufacturer’s Facility chosen when the “Select Lot Number” window appeared and a choice made.

### PUBLICLY SUPPLIED
Retrieved when the “Select Lot Number” window appeared and a choice made. Indicates whether the Lot number was publicly supplied or not.

3. At a minimum, fill in the **RED** required fields and then click on one of the buttons:
• **CANCEL** – to NOT save and return to the “Personal Settings” window.

• **RESET** – to erase any newly entered text, redisplay previous data, and remain on this window.

• **SAVE** – to save and return to the “Personal Settings” window.

**DELETING MASS IMMUNIZATIONS LOT DEFAULTS**

Locate the Lot whose defaults you want to delete, and click on the **DELETE** hyperlink. The Vaccine Name, Manufacturer, Lot Name, and Facility immediately delete. The window does not open to another window.

**MASS IMMUNIZATIONS VIS PUBLICATION DATE DEFAULT SETTINGS**

The Vaccine Information Sheet (VIS) is a publication containing information regarding the immunization. Periodically, they are updated and reprinted, and are tracked within the application.

*Note:* The System Administrator can set up an IRMS VIS Publication Date Default that will automatically populate the VIS Publication Date fields within the application if this setting is not done by the user; however, if the user has set up this default it will override the System Administrator’s setting(s).

*Note:* If the user is using both the Mass Immunizations application and the IWeb Core application, these default settings will appear in both applications.
**ADDITION/UPDATING MASS IMMUNIZATIONS VIS PUBLICATION DATE DEFAULTS**

To add/update VIS Publication Date Defaults, perform the following:

1. In the VIS Publication Date Defaults section, point and click one of the hyperlinks:
   - “**click to add**” hyperlink when adding a new publication date.
   - “**update**” hyperlink when updating an existing setting.

   The “VIS Publication Date Add/Update” window appears.

   **Figure 5-5:** Mass Immunizations VIS Publication Date Defaults Add/Update

2. The fields and their descriptions are listed in the table:

   **Table 5-4:** Mass Immunizations VIS Publication Date Defaults Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>VACCINE DESCRIPTION</td>
<td>Default name of the Vaccine that you are setting VIS Publication defaults for that will automatically populate the application windows containing this field. Click the drop-down menu arrow to view a list of vaccine.</td>
</tr>
</tbody>
</table>
### DELETING MASS IMMUNIZATIONS VIS PUBLICATION DATES

Locate the VIS Publication Date whose defaults you want to delete, and click on the **DELETE** hyperlink. The VIS Publication Date is immediately deleted. The window does not open to another window.

### MASS IMMUNIZATIONS VACCINE DEFAULT VOLUME SETTINGS

This section is used by the user to setup the default for the Vaccine Amount that will automatically populate the “Vaccination Detail” and “Vaccination Add/Edit” screens.

### ADDING/UPDATING MASS IMMUNIZATIONS VACCINE VOLUME DEFAULTS

To add/update the Vaccine Volume Defaults, perform the following:
1. From the “Personal Settings” window, point and click on the CLICK TO ADD (or UPDATE) hyperlink next to the VACCINE VOLUME DEFAULT label. The “Add Vaccine Dosage Default” window appears.

Figure 5-6: Add Vaccine Volume Default

2. The fields and their descriptions are listed in the table.

Table 5-5: Mass Immunizations Add Vaccine Dosage Default Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>VACCINE</td>
<td>Name of the vaccine you want to set a default dosage. Click the drop-down menu arrow to view/select a valid choice.</td>
</tr>
<tr>
<td>DOSAGE DEFAULT</td>
<td>Type the dosage amount that should be displayed on the &quot;Vaccination Detail&quot; and &quot;Vaccination Add/Edit&quot; screens in decimal format (without cc). For example, type 1.0.</td>
</tr>
</tbody>
</table>

3. Fill in the desired default fields and click one of the available buttons:
   - CANCEL – to NOT save and return to the “Personal Settings” window.
   - SAVE – to save and return to the “Personal Settings” window.

**DELETING MASS IMMUNIZATIONS VACCINE DOSAGE DEFAULTS**

Locate the Vaccine whose defaults you want to delete, and click on the DELETE hyperlink. The Vaccine Name, Manufacturer, Lot Name, and Facility immediately delete. The window does not open to another window.
MASS IMMUNIZATIONS PREFERENCES DEFAULT SETTINGS

This section is used by the user to setup their own user preferences to automatically populate the City, State, and Zip Code.

ADDING/UPDATING MASS IMMUNIZATIONS PREFERENCES DEFAULTS

To add/update the Preference Defaults to enable or disable “Automatic City / State / Zip Code Population,” perform the following:

1. From the “Personal Settings” window, point and click on the ENABLE/DISABLE hyperlink next to the STATUS label. The “Status” will change from enabled to disabled and vice versa.

FACILITY

This option allows a facility to define their Mass Immunization defaults for a clinic. Once the default settings are set for the facility, the defaults for all users linked to the Facility using Mass Immunizations or the Standard IWeb application will be set; however, these settings are independent of each other, meaning you can define different defaults between the two applications for the same Facility for the same time period. For example: A Lot Number defined as a default in Mass Immunizations, is not automatically the default in the Standard Application unless that same lot is defined in the Standard Application; however, there is also an Administration – Property – First Responder/Mass Imms/Dispensing setting - Combine Standard and Mass Imms Settings for Personal Settings/Facility Settings, that when set combines the Mass Imms Personal Settings/Facility Defaults settings to those selected in the IWeb Standard Application.

Once a user defines the defaults for the entire Facility, all users linked to the Facility will have the same defaults; however,
individual users may override these Facility Settings by entering their own Personal Settings (using the “Override Facility Settings” checkbox located above the “Patient Settings.”) This checkbox is set to “unchecked” as a default.

This option is only available to the Registry Client, IRMS Client, and Facility Client with the permission of “Default Vaccination Management.” Once this is set up, the FACILITY option will appear under the SETTINGS menu. User can enter the default settings for the Facility they are linked to in their login credentials. IRMS users must select a Facility prior to setting the defaults.

**SETTING UP FACILITY DEFAULTS**

To setup Facility Defaults, perform the following:

1. Login with the appropriate Login credentials and if necessary, choose an IRMS and Facility if necessary.

   **Note:** IRMS users must select a Facility prior to setting the defaults.

2. From the SETTINGS menu, click the FACILITY option. The “Facility Settings” screen appears.

   ![Facility Settings Screen](Image)

   **Figure 5-7: Facility Settings**

3. Refer to Mass Immunizations Personal Settings chapter for instructions on using this screen. Specifically, refer to the following tables for a list of field descriptions:
4. For Lot Defaults, click the **DEFAULT LOT NUMBERS** hyperlink. The “Lot Defaults Add/Update” screen appears.

**Figure 5-8: Main Lot Defaults Add/Update**

5. The fields and their descriptions are listed in the table.

**Table 5-6: Lot Defaults Add/Update**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>IRMS DO NOT LIMIT</td>
<td>To limit the Facility by a specific IRMS, click the drop-down menu arrow to select a specific IRMS; otherwise, the user’s IRMS automatically appears selected. You may also choose to not limit by IRMS by clicking the DO NOT LIMIT radio button</td>
</tr>
<tr>
<td>FACILITY DO NOT LIMIT</td>
<td>To limit the Facility by a specific Facility, click the drop-down menu arrow to make a</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-----------</td>
<td>-------------</td>
</tr>
<tr>
<td>selection; otherwise, leave the DO NOT LIMIT radio button selected.</td>
<td></td>
</tr>
</tbody>
</table>

**VFC PIN**

To limit the Facility by a specific Vaccine For Children (VFC) Personal Identification Number (PIN), click the drop-down menu arrow to view/select a valid choice. The radio button will automatically select upon selecting a choice.

**ACTIVE LOTS**

There are two boxes (referred to as “swap boxes”): Unselected and Selected. All the available active vaccine lots will be listed in the “Unselected” swap box. To select the vaccine lots,

- To select one lot, click the vaccine lot and click the >> Button to move it to the “Selected” Vaccine lots.
- To select more than one vaccine lot in sequential order, click each vaccine lot while holding the SHIFT key, and then click the >> Button.
- To select more than one vaccine lot not in sequential order, click each vaccine while holding the CTRL key, and then click the >> Button.

To move vaccine lots from the “Selected” swap box back to the “Unselected” swap box, using the same select methods as listed above, click each vaccine lot and then click the << Button.

**Note:** A maximum of five (5) default lots can be selected for one vaccine.

**Campaign Information**

Explanation of which vaccine types should be displayed when a campaign is or is not selected when adding a vaccination in the Mass Immunizations module is as follows.

If a campaign is selected:

- Only those vaccines types that are defined as counter measures for the campaign are displayed. (Campaigns -> Search/Add -> Campaign Details)
- If the Lot Defaults match the vaccine types defined for the campaign,
6. Type/select the desired settings and click one of the available buttons:

- **SAVE** – to save the settings. A message appears at the top of the window indicating the settings have been saved.
- **RESET** – to erase any selected settings and remain on the same screen.
- **CANCEL** – to return to the previous screen.

### UPDATING LOT DEFAULTS

When updating the Lot Defaults, only one lot per vaccine can be selected.

To update Lot Defaults, perform the following:

1. From the **SETTINGS** menu, click the **FACILITY** option. The “Facility Settings” screen appears.
2. Click the **UPDATE** hyperlink for the desired lot. The “Lot Defaults Add/Update” screen appears.

   **Figure 5-9: Update Lot Defaults Add/Update**

3. Click the **ACTIVE LOTS** drop-down menu arrow to view/select the desired lot.

   **Note:** Only the “Active” lots are included in the drop-down menu; you can only select one other lot for the selected vaccine.

4. Click one of the available buttons:
   - **SAVE** – to save the settings. A message appears at the top of the window indicating the settings have been saved.
   - **RESET** – to erase any selected setting(s) and remain on the same screen.
   - **CANCEL** – to return to the previous screen.
6 CHANGE PASSWORD

The Change Password option is available for all users in all modules. Once you receive your new user-id, it is recommended you change your password after you login the first time.

*Note:* If the password is within one week of expiring, the “Change Password Warning” window appears. You may change it immediately or change it later by clicking the **SKIP** button.

ACCESSING/CHANGING YOUR MASS IMMUNIZATIONS PASSWORD

To change your password, perform the following:

1. After logging into the **IWEB** application, the “Change Password” window can appear for the following reasons:

   - If the state-configurable administrative option is configured to provide a warning one week prior to password expiration.
   - If the **CHANGE PASSWORD** hyperlink was clicked while logging in.
   - If the menu option is selected.

   The “Change Password” window appears.

*Figure 6-1: Mass Immunizations Change Password - Voluntarily*
Figure 6-2: Mass Immunizations Change Password Warning

2. Type your current password in the CURRENT PASSWORD field and press the TAB key.

3. Type the new password in the NEW PASSWORD field and press the TAB key.

4. Type the new password again in the NEW PASSWORD (AGAIN) field.

5. Click one of the available buttons:
   - **SUBMIT** – to save the change (a message appears at the top of the window indicating successful change).
   - **RESET** – to erase the newly typed entries and remain on the same window. The RESET button will not reset a change after the SUBMIT button has been pressed.
   - **SKIP** – to abort changing the password.
There are various ways to obtain help when using the application:

- Access the Online Help Facility
- Refer to the Mass Immunization Application User Guide
- Call your local contact person in your state

The Online Help menu is designed to give the user an online user guide that will explain how to use the application menus and options. It is very similar to the printed Mass Immunization Application User's Guide.

*Note:* The actual help window that displays depends on the window you accessed “Help.” For example, if I am viewing the “Patient Search” window and I click the Help link, the “Patient Search” topic will display.

1. Point and click on the HELP menu. The “online help” window appears for the window you are viewing.
The left side of the window is referred to as the **Navigator Pane**. The Navigator Pane contains the topics within the Help Facility while the right side of the window contains the actual content.

### USING THE HELP FACILITY

While using the Online Help Facility, the following can be done:

- View **Contents (Opening/Closing the Book)**
- View an **Index**
- Perform a **Search**
- **Close** the book

### OPENING/CLOSING THE BOOK CONTENTS

When viewing contents, there will be pages and additional books to open.
1. When the book appears closed, click on the book or the book’s hyperlink to view the contents inside the book. The contents appear as pages with a question mark on them. The illustration below shows an open book with content pages.

![Figure 7-2: Open Book](image)

2. When you are finished with a topic, you can close the book by clicking on the book.

**Viewing an Index**

The index displays an alphabetized list where keywords can be entered. A global search is performed meaning the entire Help Facility is searched versus only the On-Line Help Facility book.

**Note:** Keyword entries are not case-sensitive.

1. Click on the **INDEX** tab.
2. You can either:
   - **SCROLL the List** – to view the contents of the index.
   - **Type a Keyword** – to immediately reposition the index based on the letters you have typed. The index repositions as the letters are typed and will locate the first occurrence.

3. Point and click on the desired topic to view the contents.

**PERFORMING A SEARCH**

The **SEARCH** displays an open field to type and enter a keyword. A global search is performed meaning the entire Help Facility is searched versus only the On-Line Help Facility book.

**Note:** Keyword entries are not case-sensitive.
1. Click on the **SEARCH** tab.

![Figure 7-5: Search Tab](image)

2. Type the keyword and press the **ENTER** key. The search is performed and the Navigator Pane fills with the topics. If nothing is found, "**No Topics Found**" will appear in the Navigator Pane.

![Figure 7-6: Navigator Pane](image)

3. Locate the desired topic and click it to view it.

**Closing the Navigator Pane**

You can close the “Navigator Pane” on and off by pressing the **close window icon** located at the top, right corner of the “Navigator Pane” window. To turn the “Navigator Pane” back on, click the **CONTENTS** tab.
By opening the “Navigator Pane,” all the books and topics will display. By closing the “Navigator Pane,” the content consumes the entire window.
8 MASS IMMUNIZATIONS TOOLBOX MENU

The purpose of the TOOLBOX MENU is for authorized users to Search, Add, and Edit names of Lot Numbers for consistent data entry, and to avoid data entry redundancy. It is used to add vaccine/medications that will be used within the IRMS/Facility.

A “state configurable” option for a Facility Inventory Manager can be set up for a facility to allow facility-wide lot number defaults to be used. If a user does NOT have Lot Number defaults set up in their Personal Settings, the Inventory Manager’s defaults are used; however, if the user DOES have Lot Defaults setup in their Personal Settings, they will override the Facility Inventory Manager’s settings.

A SEARCH is always done prior to Adding a Lot.

SEARCHING FOR A MASS IMMUNIZATION LOT

Before adding a lot, a SEARCH is done to prevent duplicates in the lot inventory database. The same fields are used in the search a lot as is used to add a Lot.

1. From the TOOLBOX menu, point and click on the LOT NUMBERS option. The “Lot Number Maintenance – Search Results” window appears.
Figure 8-1: Mass Immunizations Lot Number Maintenance

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vaccine</td>
<td>Click the drop-down menu arrow to view/select a valid choice for the Vaccine name. After selecting a choice, the checkbox will automatically check.</td>
</tr>
<tr>
<td>Manufacturer</td>
<td>Click the drop-down menu arrow to view/select a valid choice for the Manufacturer name. After selecting</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>--------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>a choice, the checkbox will automatically check.</td>
<td></td>
</tr>
<tr>
<td>LOT NUMBER</td>
<td>Type the Lot Number into the blank field. After typing the lot number, the checkbox will automatically check.</td>
</tr>
<tr>
<td>FACILITY</td>
<td>Click the drop-down menu arrow to view/select a valid choice for the Facility name. After selecting a choice, the checkbox will automatically check. Note: If a Facility Display (Abbreviated) Name was entered for the facility, it will appear in the list as opposed to the full name of the facility.</td>
</tr>
<tr>
<td>INACTIVE STATUS</td>
<td>Click the drop-down menu arrow to view/select a valid choice for the Lot Status. Choices are:</td>
</tr>
<tr>
<td></td>
<td>• All (both active and inactive)</td>
</tr>
<tr>
<td></td>
<td>• Inactive (only)</td>
</tr>
<tr>
<td></td>
<td>• Active (the default)</td>
</tr>
<tr>
<td>INACTIVE REASON</td>
<td>If the &quot;Inactive&quot; status is chosen, click the drop-down menu arrow to select the reason. Choices are:</td>
</tr>
<tr>
<td></td>
<td>• Cold Chain Failure</td>
</tr>
<tr>
<td></td>
<td>• Recall</td>
</tr>
<tr>
<td></td>
<td>• Other</td>
</tr>
<tr>
<td></td>
<td>Note: If the reason of &quot;other&quot; is selected, the “Inactive Description” text box opens to type a “free-form” reason.</td>
</tr>
<tr>
<td>INACTIVE DESCRIPTION (IF OTHER)</td>
<td>This is a “free-form” text box that is used to enter a description when the “Inactive Reason” contains “Other.”</td>
</tr>
<tr>
<td>SORT BY</td>
<td>Click the drop-down menu arrow to view/select a valid choice for the sorting. Examples of valid choices are:</td>
</tr>
<tr>
<td></td>
<td>• Expiration Date</td>
</tr>
<tr>
<td></td>
<td>• Facility Group, Facility</td>
</tr>
<tr>
<td></td>
<td>• Facility</td>
</tr>
</tbody>
</table>
3. Determine the type of search you want to perform and click the **DROP-DOWN ARROW(S)** to make a selection or type the Lot Number. The “Search Results” will appear.

**Figure 8-2: Mass Immunizations Lot Number Maintenance Search Results**

![Lot Number Maintenance Search Results](image)

4. Point and click one of the available buttons:
   - **SEARCH** – to perform a new search after making your selections. Repeat from Step 3 above.
   - **SELECT ARROW** – to perform an **EDIT** on the chosen Lot. Continue to the section titled, “Editing a Lot Number.”
   - **ADD** – to **ADD** a new Lot Number. Continue to the next section titled, “Adding a Lot Number.”
ADDING A MASS IMMUNIZATIONS LOT NUMBER

Remember, a SEARCH is always performed before ADDING. Perform the following steps to "Add a Lot Number."

1. From the TOOLBOX menu, point and click on the LOT NUMBERS option. The “Lot Number Maintenance—Search (/Add)” window appears. Refer to Figure 8-1 for an illustration.

2. Perform a search by selecting/typing your search criteria (refer to the previous section for instructions) and press the SEARCH button or ENTER key. The “Lot Number Maintenance Search Results” window appears. Refer to Figure 8-2 for an illustration.

3. Click on the ADD button to add a new Lot Number. The “Lot Number Maintenance [Add]” window appears.

   **Figure 8-3: Mass Immunizations Lot Number Maintenance Add**

   ![Lot Number Maintenance [Add] Window](image)

4. At a minimum, fill in the “RED labeled” fields. It is recommended to fill in as much information as possible. Refer to the table for a list of fields and definitions.
Table 8-2: Mass Immunizations Lot Number Maintenance Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION OF USE</th>
</tr>
</thead>
<tbody>
<tr>
<td>MANUFACTURER</td>
<td>Manufacturer name of the vaccine. Click on the drop-down arrow for a list of valid choices. This is a required field.</td>
</tr>
<tr>
<td>LOT NUMBER</td>
<td>Lot number for the vaccine. Type the Lot Number. This is a required field.</td>
</tr>
<tr>
<td>VACCINE</td>
<td>Name of the Vaccine. Click on the drop-down menu arrow for a list of valid choices. This is a required field.</td>
</tr>
<tr>
<td></td>
<td>If you attempt to create a new vaccine lot of an “unspecified” vaccine type (e.g., Hib – Unspecified), a warning message appears at the top of the window to alert the user that this action is not recommended. The message states, “Vaccine is unspecified, are you sure you want to add?” You will be required to click the checkbox verifying that you want to continue in order to add the unspecified vaccine.</td>
</tr>
<tr>
<td>FACILITY</td>
<td>Name of the facility associated with the vaccine. Click on the drop-down arrow for a list of valid choices.</td>
</tr>
<tr>
<td></td>
<td>Note: If a Facility Display (Abbreviated) Name was entered for the facility, it will appear in the list as opposed to the full name of the facility.</td>
</tr>
<tr>
<td>EXPIRATION DATE</td>
<td>Date the vaccine is no longer valid for use. If a lot number does not include an expiration day within the expiration date, use the last day of the month to complete the date. The format must be mm/dd/yyyy.</td>
</tr>
<tr>
<td>PUBLICLY SUPPLIED</td>
<td>Indicates whether the vaccine was publicly supplied or not. Click the radio button for yes or no.</td>
</tr>
<tr>
<td>INACTIVE</td>
<td>Indicates whether the vaccine is inactive or not. If the checkbox contains a “check,” the Lot Number is INACTIVE; otherwise, the Lot Number is ACTIVE. Since records cannot be deleted, placing the Lot Number inactive flags it so it cannot be used.</td>
</tr>
</tbody>
</table>

5. Point and click on one of the buttons:
Toolbox Menu

- **CANCEL** – to NOT add and return to the “Lot Number Maintenance Search(/Add)” window.

- **IGNORE UNSPECIFIED WARNING AND ADD LOT NUMBER** (checkbox) – to ignore the warning and continue to add. This is a state-configurable checkbox and may not appear.

- **ADD** – to access the “Add to Total Doses” window. Continue to the section titled, “Adding/Subtracting Doses.”

**Note:** Once you click the **ADD** button, you cannot **CANCEL** the addition. Instead, you will need to “Inactivate” it. Refer to the section titled, “Inactivating a Lot” for instructions.

**Note:** If the Administrative Setting for Limit Manufacturer by Vaccine is set for a specific vaccine to be “None,” an error will appear when attempting to add the Lot Number, “Unable to add, manufacturer doesn't make this vaccine.” Choose a correct vaccine.

**EDITING MASS IMMUNIZATIONS LOT NUMBERS**

As long as no vaccinations have been administered from an existing lot, you can edit the lot number, manufacturer, and vaccine type to correct data entry mistakes.

**Note:** If a shot has been administered from a lot, even if deleted, a user will no longer be able to edit lot number.

1. From the **LOT NUMBERS** menu, point and click on the Search (/Add) option. The “Lot Number Maintenance—Search (/Add)” window appears.
2. Perform a search by selecting/typing your search criteria (refer to the previous section for instructions) and press the **SEARCH** button or the **ENTER** key. The “Lot Number Maintenance Search Results” window appears.

3. Click on the **SELECT ARROW** on the Lot you want to edit. The “Lot Number Maintenance [Detail]” window appears.

   **Figure 8-4: Mass Immunizations Lot Number Maintenance Detail**

   ![](lot_number_maintenance_detail.png)

4. Click one of the available buttons:
   - **BACK** – to return to the previous window.
   - **VIEW LOT LOG** – to view the log for this lot. Refer to the section titled, “Viewing Lot Logs and Offsite Lot Logs” for instructions.
   - **VIEW OFFSITE LOG** – (not shown above) to view Offsite Logs. Refer to the section titled, “Viewing Lot Logs and Offsite Lot Logs” for instructions.
   - **GENERATE BAR CODE** – (must have the Bar Code Tools enabled in the Administration – Property – Registry Settings and IRMS Settings.) Displays a “Dialog Box” to print the vaccination details on a single label, single label (Avery 5160)
Sheet (row/column), or multiple labels (Avery 5160) in 2D format.

a) Click the desired radio button to the left of the label description and then click the PRINT button to send the output to your printer.

b) The “Lot Number Maintenance – Detail” window reappears.

- **ADD TO SCAN SHEET** – (must have the Bar Code Tools enabled in the Administration – Property – Registry Settings and IRMS Settings.) Adds the bar code to a scan sheet.
  
a) Click the ADD TO SCAN SHEET button. A “Pop-up Dialog Box” appears indicating “Lot Added to Scan Sheet.”

b) To view/print a scan sheet, choose the SCAN SHEET option from the Lot Numbers menu. For instructions, refer to the section titled, “Scan Sheet” for additional instructions.

- **EDIT** – to edit Lot Number Details. A warning message displays.

Figure 8-5: Mass Immunizations Lot Number Record Lock Warning Dialog

Note: This is a warning telling you that your edits will prevent others from using this lot while you are editing. You want to make your edits as quickly as possible.

5. Click **OK** to continue. The “Lot Number Maintenance [Update]” window appears.
Figure 8-6: Mass Immunizations Lot Number Maintenance Update

<table>
<thead>
<tr>
<th>Lot Number Maintenance [Update]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturer: ABBOTT-AB</td>
</tr>
<tr>
<td>Lot Number: 19570101</td>
</tr>
<tr>
<td>Vaccine: Varicella</td>
</tr>
<tr>
<td>Facility: FIRST RESPONDER TEST</td>
</tr>
<tr>
<td>Doses Used: 0</td>
</tr>
<tr>
<td>Doses Wasted and Returned: 0</td>
</tr>
<tr>
<td>Doses Wasted and Disposed: 0</td>
</tr>
<tr>
<td>Doses Available: 250</td>
</tr>
<tr>
<td>Doses Total: 250</td>
</tr>
<tr>
<td>Expiration Date: 12/30/2010</td>
</tr>
<tr>
<td>Publicly Supplied: Yes</td>
</tr>
<tr>
<td>Inactive: No</td>
</tr>
<tr>
<td>Inactive Reason: --select--</td>
</tr>
</tbody>
</table>

- **SAVE** - to access the “Lot Number Maintenance [Detail]” window.
- **RESET VALUES** - to erase newly typed data, redisplay the previous data, and remain on the “Lot Number Maintenance [Update]” window.
- **CANCEL** - to NOT save and return to the “Lot Number Maintenance” window.
- **ADD DOSES** - to access the “Add to Total Doses” window. Continue to the section titled, “Adding/Subtracting Doses.”

**Note:** Modify the Doses Totals before modifying other fields.

6. If you are adding/subtracting doses, continue to the section titled, “Adding/Subtracting Doses”; otherwise, continue to the next step.

7. If editing other fields excluding the addition/subtraction of doses, make your editing changes and then click one of the available buttons:

- **SAVE** - to access the “Lot Number Maintenance [Detail]” window.
- **RESET VALUES** - to erase newly typed data, redisplay the previous data, and remain on the “Lot Number Maintenance [Update]” window.
- **CANCEL** - to NOT save and return to the “Lot Number Maintenance” window.
- **ADD DOSES** - to access the “Add to Total Doses” window. Continue to the section titled, “Adding/Subtracting Doses.”
**SUBTRACT DOSES** - to access the “Subtract to Total Doses” window. Continue to the section titled, “Adding/Subtracting Doses.”

**ADDING OR SUBTRACTING MASS IMMUNIZATIONS DOSES**

Whether you are adding to doses or subtracting from doses, the same fields appear on both the windows.

The “Add to Total Doses” window will appear when you have added a new lot number and when you have pressed the **ADD DOSES** button.

![Figure 8-7: Add to Mass Immunizations Total Doses](image)

The “Subtract from Total Doses” window appears when you have pressed the **SUBTRACT DOSES** button.
To add or subtract doses, perform the following:

1. Click on the appropriate button, **ADD DOSES** or **SUBTRACT DOSES** button.

2. The fields and their descriptions are the same for both windows and are listed in the table below.

   **Table 8-3: Add/Subtract Mass Immunizations Doses Field Descriptions**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>REASON FOR CHANGE</td>
<td>Refer to the next table for a conclusive list of how the Lot Number inventory is impacted. Note: This is a mandatory field entry.</td>
</tr>
<tr>
<td>DATE OF TRANSACTION</td>
<td>Defaults to “today’s” date and automatically fills in. Note: This is a mandatory field entry.</td>
</tr>
<tr>
<td>NUMBER OF DOSES (ADDED OR SUBTRACTED)</td>
<td>Total number of doses being added or subtracted. Note: This is a mandatory field entry.</td>
</tr>
</tbody>
</table>
Toolbox Menu

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>VFC PIN OF OTHER PARTY (IF APPLICABLE)</td>
<td>If the vaccine being added was VFC supplied, this field should have an entry.</td>
</tr>
<tr>
<td>PUBLICLY SUPPLIED</td>
<td>If the vaccine is publicly supplied, this field will contain a Y for Yes, and an N for No.</td>
</tr>
</tbody>
</table>

3. Click the drop-down menu arrow to view/select a valid choice for **REASON FOR CHANGE**. The Reasons and their impact are listed in the table.

**Note:** When subtracting doses, three different adjustments can occur depending on the “Reason for the Change.”

**Table 8-4: Mass Immunizations Reasons for Lot Number Addition/Subtraction**

<table>
<thead>
<tr>
<th>REASON FOR CHANGE</th>
<th>EFFECTS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SUBTRACT FROM TOTAL DOSES</strong></td>
<td></td>
</tr>
<tr>
<td>RETURNED TO VFC PROGRAM</td>
<td>Doses TOTAL is decremented</td>
</tr>
<tr>
<td>SENT TO ANOTHER PROVIDER</td>
<td>Doses TOTAL is decremented</td>
</tr>
<tr>
<td>RETURNED DIRECTLY TO VENDOR, NOT VFC SUPPLIED</td>
<td>Doses TOTAL is decremented</td>
</tr>
<tr>
<td>OVER ESTIMATED TOTAL DOSES</td>
<td>Doses TOTAL is decremented</td>
</tr>
<tr>
<td>CORRECTION OF INVALID ENTRY</td>
<td>Doses TOTAL is decremented</td>
</tr>
<tr>
<td>INEFFECTUAL</td>
<td>Doses TOTAL is decremented</td>
</tr>
<tr>
<td>SPOILED, WASTED (DROPPED, SPILLED)</td>
<td>*Doses WASTED is incremented</td>
</tr>
<tr>
<td>EXPIRED</td>
<td>*Doses WASTED is incremented</td>
</tr>
<tr>
<td>LOST DURING SHIPMENT</td>
<td>*Doses WASTED is incremented</td>
</tr>
<tr>
<td>DAMAGED DURING SHIPMENT</td>
<td>*Doses WASTED is incremented</td>
</tr>
<tr>
<td>LOST BY PROVIDER, UNACCOUNTED FOR IN PROVIDER INVENTORY</td>
<td>*Doses WASTED is incremented</td>
</tr>
<tr>
<td>REASON FOR CHANGE</td>
<td>EFFECTS</td>
</tr>
<tr>
<td>---------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>TWO DOSES GIVEN TO BE EQUIVALENT OF NORMAL DOSAGE FOR THIS AGE PERSON</td>
<td>Doses USED is incremented</td>
</tr>
<tr>
<td>VACCINE USED AT REMOTE CLINIC</td>
<td>Doses USED is incremented</td>
</tr>
<tr>
<td>ADMINISTERED TO CLIENT WHO CHOSE NOT TO BE IN REGISTRY</td>
<td>Doses USED is incremented</td>
</tr>
<tr>
<td></td>
<td>Note: If the administrator has the “Enable option to deduct inventory for patient not in the registry” property vaccine setting checked, this reason will not appear in the list.</td>
</tr>
</tbody>
</table>

**ADD TO TOTAL DOSES**

<table>
<thead>
<tr>
<th>REASON FOR CHANGE</th>
<th>EFFECTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>RECEIVED FROM VFC PROGRAM</td>
<td>Doses TOTAL is incremented</td>
</tr>
<tr>
<td>RECEIVED FROM ANOTHER PROVIDER</td>
<td>Doses TOTAL is incremented</td>
</tr>
<tr>
<td>RECEIVED DIRECTLY FROM VENDOR, NOT VFC SUPPLIED</td>
<td>Doses TOTAL is incremented</td>
</tr>
<tr>
<td>UNDER ESTIMATED TOTAL DOSES</td>
<td>Doses TOTAL is incremented</td>
</tr>
<tr>
<td>CORRECTION OF INVALID ENTRY</td>
<td>Doses TOTAL is incremented</td>
</tr>
<tr>
<td>RECEIVED FROM CDC, NOT VFC SUPPLIED</td>
<td>Doses TOTAL is incremented</td>
</tr>
<tr>
<td>CORRECTION TO WASTED DOES</td>
<td>Doses TOTAL is incremented</td>
</tr>
</tbody>
</table>

*DOSES THAT ARE WASTED ARE NOT COUNTED AS ADMINISTERED IN THE LOT NUMBER TOTALS, BUT ARE LISTED SEPARATELY SINCE THEY NEED TO BE COUNTED AS PART OF THE ORIGINAL TOTAL.*

4. At a minimum, fill in the required fields (those displayed in **RED** text).

5. Click one of the available buttons:
   - **CANCEL** – to NOT save and access the “Lot Number Maintenance [Update]” window.
   - **SAVE** – to save and display the “Lot Number Maintenance [Detail]” window.
VIEWING MASS IMMUNIZATIONS INVENTORY LOT LOGS AND OFFSITE LOGS

To view either the Lot Number Inventory Log or the Offsite Lot Number Log, access the “Lot Number Maintenance [Detail]” window.

1. From the LOT NUMBERS menu, point and click on the Search (/Add) option. The “Lot Number Maintenance—Search(/Add)” window appears.

2. Perform a Search by selecting/typing your search criteria (refer to the previous section for instructions) and press the SEARCH button or the ENTER key. The “Lot Number Maintenance Search Results” window appears.

3. Click on the SELECT ARROW on the Lot Log you want to view. The “Lot Number Maintenance [Detail]” window appears.

4. Click one of the available buttons:
   - **VIEW LOT LOG** – to view the Lot Number Inventory Log. Continue to the respective section for instructions.
   - **VIEW OFFSITE LOG** – to view the Lot Number Offsite Log. Continue to the respective section for instructions.

VIEWING MASS IMMUNIZATIONS LOT LOG (LOT NUMBER INVENTORY)

This log displays the Lot Number Inventory such as changes made to doses, reason description, date and timestamp of the change. It is used to view and verify changes that have been made to the LOT.

*Note:* Vaccinations for patients who “opt out” or are exempt from the registry, will be included in the central registry for inventory and CASA purposes.
1. From the **LOT NUMBER MAINTENANCE [DETAIL]** window, click on the **VIEW LOT LOG** button. The “Lot Number Inventory Log” window displays.

   ![Figure 8-9: Mass Immunizations Lot Number Inventory Log](image)

   **Note:** No changes can be made on this window.

2. This window contains intuitively named labels except for the Insert Stamp. The Insert Stamp indicates the date (mmdyyyy) and time the Lot inventory was adjusted.

3. Press the **BACK** button to return to the “Lot Number Maintenance [Detail]” window.

### Viewing Mass Immunizations Offsite Logs (Lot Number Inventory)

If you are transporting and/or using vaccine inventory offsite, you can Add Log Records regarding the addition (Check In) or subtraction (Check Out) of doses including comments. You can also **PRINT** the log information.

**Note:** The application will only accept one value at a time in the Check In or Check Out fields.

1. From the **LOT NUMBER MAINTENANCE [DETAIL]** window, click on the **VIEW OFFSITE LOG** button. The “Offsite Lot Number Log” window displays.
Figure 8-10: Mass Immunizations Offsite Lot Number Log

2. Click one of the available buttons:
   - **ADD LOG RECORD** – to add comments to the Log. Continue to the section titled, “Adding a log record.”
   - **PRINT LOG** – to send the displayed log to a printer.
   - **BACK** – to return to the “Lot Number Maintenance [Detail]” window. The “Offsite Lot Number Maintenance [Add]” window appears.

**ADDING A MASS IMMUNIZATIONS INVENTORY LOG RECORD**

To add a **LOG RECORD** to the Offsite Lot Number Log, perform the following:

1. From the “Offsite Lot Number Log” window, click the **ADD LOG RECORD** button. The “Offsite Lot Number Maintenance [Add]” window appears.
Figure 8-11: Mass Immunizations Add Log Record to Offsite Lot Log

### Offsite Lot Number Maintenance [Add]

| Manufacturer: | A8B8OT |
| Lot Number:   | 12345  |
| Facility:     | STC   |
| Comments:     |       |
| Number of Doses: | [Check In (x)] [Check Out (x)] |

**Check In:** Check in this lot (unused vaccine)
**Check Out:** Check out this lot

2. Fill in the “RED” labeled mandatory fields:
   - Comments
   - Number of Doses you’re checking in/out

3. Click one of the available buttons:
   - **SAVE CHANGES** – to save and return to the “Offsite Lot Number Log” window.
   - **RESET** – to erase newly typed entries and remain on the window.
   - **CANCEL** – to NOT save and return to the “Offsite Lot Number Log” window.

### Inactivating a Mass Immunizations Lot Number

**LOT NUMBERS** cannot be deleted, but you can **INACTIVATE** them so they are not available for use.

1. From the **LOT NUMBERS** menu, point and click on the Search (/Add) option. The “Lot Number Maintenance—Search (/Add)” window appears.

2. Perform a search by selecting/typing your search criteria (refer to the previous section for instructions) and press the **SEARCH** button or the **ENTER** key. The “Lot Number Maintenance Search Results” window appears.
3. Click on the SELECT ARROW for the Lot you want to Inactivate. The “Lot Number Maintenance [Detail]” window appears.

4. Click on the EDIT LOT NUMBER button. A warning message displays.

5. Click OK button on the warning dialog to continue. The “Lot Number Maintenance [Update]” window appears.

6. Click on the INACTIVE checkbox.

7. Click the SAVE button.

8. To EXIT out of this window, choose another menu option.

**VIEWING THE VACCINE SCAN SHEET**

This option is used to view and print a Lot Number Inventory Scan Sheet. This sheet is used to scan the vaccine bar codes when the vaccine has been administered.

This option only appears for a Registry Client when the Administrative Property – Registry - Enable Bar Code Tools” has been set.

To view and/or manipulate the Scan Sheet items, perform the following:

1. From the LOT NUMBERS Menu, click the SCAN SHEET option. The “Scan Sheet” window appears.
2. To add **FREE-FORM** Text to the “text area” (large gray area under the PDF Preview section of the screen), type the text in the Text Field.
   
   - Select the **FONT SIZE** by clicking the drop-down menu area (8 – 40).
   - Select the **FONT STYLE** by clicking the drop-down menu (Normal or Bold).
• Click the **ADD** Button. The “Free-Form Text” is added to the PDF Preview section of the window enclosed in a lined box.

  a) Once the PDF Preview contains the “Free-Form Text,” you can reposition it by pointing/clicking the center of the text block and drag it to anywhere in the PDF Preview.

3. To add a **VACCINE LOT** to the PDF Preview section of the window, perform the following:

• Click the checkbox to insert a checkmark, and then click the **LAYOUT AS AVERY 5160** button. Each vaccine lot will appear in the PDF Preview section from left to right.

  a) Once the PDF Preview contains the “Free-Form Text,” you can reposition it by pointing/clicking the center of the text block and drag it to anywhere in the PDF Preview.

4. To display/create the PDF, perform the following:

• Verify all the free-form text and vaccines are appearing in the PDF Preview section of the window.

• Click the **CREATE PDF** button. The “Scan Sheet” appears in a separate Browser window providing the option to print.

![Figure 8-13: Scan Sheet PDF](image)

5. To remove a vaccine from the “Currently Selected Lots” section of the window, perform the following:

• Click the checkbox to the left of the Vaccine to be removed, and click on the **REMOVE** hyperlink.
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9 MASS IMMUNIZATIONS PATIENT MENU

The Patient menu has one option—the Patient SEARCH/ADD. Once you perform a patient search and intend to add a new patient, the patient's demographics, vaccinations, medications, and/or contraindications can also be entered.

SEARCHING/SCANNING FOR A MASS IMMUNIZATIONS PATIENT

Before you can view, edit, or add a new patient, a search needs to be done by scanning a barcode or entering the data.

A search will try to locate an EXACT match unless you use one of the wildcard characters with your entry. The wildcard characters (% and _) and their differences are:

- **Percent (%)** – Useful when you are unsure how a **name** is spelled. The percent sign is used to indicate multiple letters.

  For example, we are unsure if the name is Janet or Janice. We could enter Jan% for the first name and click on the **SEARCH** button to locate all names that begin with JAN.

- **Underscore (_)** – Useful when you are unsure how a **name** is spelled, but know it is a single letter; e.g., we are unsure if the name is Diane or Diana. We could enter Dian_ for the first name and click on the **SEARCH** button to locate all names that begin with DIAN.

**Note:** Do not use wildcard characters when using initials in the **FIRST NAME, LAST NAME**, or when using the **BIRTH DATE** field. The search is performed by applying the wildcard at the end of the string that is typed.
The results of the search will position in the bottom half of the window along with the search criteria. The total results that can be returned are 250 records. If there are more than 250 records, a message will appear indicating to limit your search by adding additional search criteria.

To perform a Patient Search, perform the following steps:

1. From the **PATIENT** menu, click on the **SEARCH/ADD** option. The “Patient Search” window appears.

   ![Figure 9-1: Mass Immunizations Patient Search](image)

2. The fields and their descriptions are listed in the table.

   **Table 9-1: Mass Immunizations Patient Search Field Descriptions**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION OF USE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FIRST NAME OR INITIAL</strong></td>
<td>This field can be used to enter the entire first name or the initial of the first name. This is a required field.</td>
</tr>
<tr>
<td><strong>LAST NAME OR INITIAL</strong></td>
<td>This field can be used to enter the entire last name or the initial of the last name. This is a required field.</td>
</tr>
<tr>
<td><strong>BIRTH DATE</strong></td>
<td>This is the birth date of the patient. Type the date using the format mmddyyyy.</td>
</tr>
<tr>
<td><strong>CAPTURE BARCODE</strong></td>
<td>In order for this field to appear, the following Administration Properties must be set:</td>
</tr>
<tr>
<td></td>
<td>- Registry Settings</td>
</tr>
<tr>
<td></td>
<td>- Patient Settings</td>
</tr>
<tr>
<td></td>
<td>- First Responder / Mass Imms/Dispensing</td>
</tr>
<tr>
<td></td>
<td>Enable the following options:</td>
</tr>
</tbody>
</table>

   ![Table 9-1: Mass Immunizations Patient Search Field Descriptions](image)
3. Determine whether you are going to **CAPTURE a BARCODE** to use for the patient search or use the text fields to enter the patient information. If capturing a barcode, follow the bulleted instructions; otherwise, continue to the Step 4.

   - Point the scanner to the patient information barcode and scan it.
   - Click the **SEARCH** button. The “Patient Search Results” window appears.
   - Continue to Step 5.

4. Type data into the **RED labeled** fields.

5. Click the **SEARCH** button or the **ENTER** key. The “Patient Search Results” window appears with either matched results or no match results (each is shown below).
Figure 9-2: Mass Immunizations Patient Search Results with a Match

Note: The next figure illustrates the “Patient Search Results” without a match.

Figure 9-3: Mass Immunizations Patient Search Results without a Match

6. Click one of the available buttons:
   - **SELECT ARROW** – to select the patient for editing. Continue to the section titled, “Editing a Patient.”
   - **CANCEL** – to abort working with the patient and return to the “Patient Search” window.
• **ADD NEW PATIENT** – to add a new patient. Continue to the section titled, “Adding a new Patient.”

**ADDING A NEW MASS IMMUNIZATIONS PATIENT**

When adding a new patient, a Patient Search is always performed first. To add a new patient, perform the following steps:

1. From the PATIENT menu, click on the SEARCH/ADD option. The “Patient Search” window appears. Refer to Figure 9-1 for an illustration.

2. Click the ADD NEW PATIENT button. The “Patient Add/Vaccination Add/Contraindication Add” window appears.
3. The fields and descriptions for adding a patient are listed in the table.

Table 9-2: Mass Immunizations Patient Add/Edit Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION OF USE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PATIENT ADD</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FIRST NAME OR INITIAL</strong></td>
<td>This field will contain the lettering that was used to perform the search. If the entire first name was not entered, finish typing the first name. This is a required field.</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION OF USE</td>
</tr>
<tr>
<td>---------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>MIDDLE NAME</td>
<td>This is the patient's middle name and is an optional field.</td>
</tr>
<tr>
<td>LAST NAME OR INITIAL</td>
<td>This field will contain the lettering that was used to perform the search. If the entire last name wasn’t entered, finish typing the last name. This is a required field.</td>
</tr>
<tr>
<td>BIRTH DATE</td>
<td>This is the birth date of the patient. This field will contain the date that was used to perform the search.</td>
</tr>
<tr>
<td>GENDER</td>
<td>Gender of the patient. Click on the drop-down arrow for a list of valid choices.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: An Administration – Setting – Required Field is available that may force this field to have an entry; thus, may appear in <strong>RED.</strong></td>
</tr>
<tr>
<td>SSN</td>
<td>Social Security Number of the patient.</td>
</tr>
<tr>
<td>MEDICARE ID</td>
<td>(State configurable option to display this field.) Identification number of the patient’s Medicare.</td>
</tr>
<tr>
<td>MEDICAID #</td>
<td>(State configurable option to display this field.) Identification number of the patient’s Medicaid.</td>
</tr>
<tr>
<td>ADDRESS</td>
<td></td>
</tr>
<tr>
<td>STREET</td>
<td><strong>PO BOX</strong> or <strong>PHYSICAL ADDRESS</strong> can be entered. They can be used separately, or together.</td>
</tr>
<tr>
<td></td>
<td><strong>STREET</strong> – If there isn’t a PO BOX, a normal street address should be entered, if it wasn’t entered initially from the original Search window. Standard US Postal Service abbreviations can be used.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: An Administration – Setting – Required Field is available that may force this field to have an entry; thus, may appear in <strong>RED.</strong></td>
</tr>
<tr>
<td>ZIP CODE</td>
<td>Zip code where the patient lives. This may automatically fill if set in the Personal Settings.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: The “Select Zip Code” dialog box will reappear when the City/State fields have been edited and more than one zip code exists for the City. If only one zip code exists for the city, it will automatically populate the field.</td>
</tr>
<tr>
<td>CITY</td>
<td>City name where the patient lives. This may automatically fill if set in the Personal Settings.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: An Administration – Setting – Required Field is available that may force this field to have an entry; thus, may appear in <strong>RED.</strong></td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION OF USE</td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| STATE                | State abbreviation where the patient lives. Click on the drop-down arrow to select a valid choice. This may automatically fill if set in the Personal Settings.  
**Note:** An Administration – Setting – Required Field is available that may force this field to have an entry; thus, may appear in “RED.” |
| PHONE NUMBER         | Home phone number for the patient. The "area code" portion of the phone number may automatically fill if set in the Personal Settings. |
| GUARDIAN INFO        |                                                                                     |
| MOTHER'S MAIDEN NAME (LAST NAME ONLY) | Maiden name (birth-given last name) of the patient's mother. |
| GUARDIAN FIRST NAME  | First name of the patient's guardian.                                                |
| COMMENTS             |                                                                                     |
| CAMPAIGN             | Name of the campaign associated with the Mass Immunizations. Click the drop-down menu to view/select a CAMPAIGN because this field no longer automatically populates. If more than one campaign is entered into the application, the screen will refresh the vaccinations for the selected campaign: otherwise, the screen will display a single campaign’s vaccines versus refresh when it is selected. Expired lots will not be included in the list.  
Examples of Campaigns are:  
- 2008 CDC Exercise  
- Pan Flu (STC automatically provides this campaign)  
**Notes:**  
- A system administrative registry property setting exists that may require a campaign selection; thus, if required this field appears in “red.”  
- A patient can be associated to multiple campaigns |
but only one immunization can be associated per Campaign/Tier. If a second shot is provided in a subsequent Tier, then the patient gets moved to the subsequent Tier and the first shot stays in Tier 1.
- If a Campaign has been inactivated, it will not appear in the drop-down list.

**CAMPAIGN FIELD1 NAME (UP TO FOUR)**
This is a custom name for the campaign that will display in the Mass Immunizations application. You can have up to four custom names. If an entry is not made in any of the fields, then nothing will appear in the Mass Immunizations application.

**TIER**
Name of the tier associated with the Mass Immunization campaign. When a Campaign is selected, you will be required to select a Tier. Click the drop-down menu arrow to view/select a TIER.

**Note:** A system Administrative setting is available that may require this field to be selected, so it may appear in red; otherwise, it is optional.

**VACCINATOR**
Name of the person giving the immunization.

**Note:** If using Barcode Tools, the following Administration Property settings must be setup in order to see the scanning fields.
- Registry Settings – Enable Barcode Tools
- Patient Settings – Patient Search Barcode Button Text
- Mass Immunizations – Enable Barcode Tools

Additionally, the specific IRMS must have the “Enable Barcode Tools” option checked.

When these settings are set, they allow an extra field to display in order to scan the barcode. Point the scanner to the Vaccinator barcode and scan. After it scans, the label <Scan Barcode Here> will reappear.

4. Continue to the next section titled, “Adding a Vaccination” or click one of the available buttons:
- **PRINT** checkbox – prints the “Patient Vaccination Screen” after clicking the checkbox and clicking
SAVE or SAVE & QUEUE buttons. The checkbox option is retained for the next time. The Patient Vaccination screen appears.

Figure 9-5: Mass Imms Patient Vaccination - Sample

- CANCEL – to abort adding a patient and return to the “Patient Search” window.
- SAVE – saves the patient addition and redisplays the “Patient Search” window.
- CAPTURE LOT BARCODE – to capture/scan the Vaccine Lot barcode.

Figure 9-6: Scan Now Prompt

a) Point the scanner to the barcode and SCAN the barcode label.

b) Click OK. The barcode information is copied into the appropriate fields (Vaccine/Medicine, Manufacture, and Lot)
c) Click the **SAVE** button.

**ADDING A MASS IMMUNIZATIONS VACCINATION AND/OR CONTRAINDICATION**

Contraindications do not need to be associated to a Campaign, but reports include all contraindications for the vaccines that are part of a Campaign.

If the system administrator has specified “shortcuts” for the application and there are multiple active lots, the lots will display as radio buttons (shown below). If you have only one lot specified in “Personal Settings,” then that lot will be selected by default; otherwise, the manufacturer/lots will all appear allowing you to make a selection.
Note: When the green shaded section, “Patient Address Information (Most recent record in system)” appears, it provides the opportunity to copy the address information from the most recent record within the application if it matches what is reported on paper. This box indicates the patient data was saved prior to receiving a vaccination/contraindication.

1. The fields and their descriptions are listed in the table:
### Table 9-3: Mass Immunizations Vaccination/Contraindication Add Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION OF USE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PREVIOUS VACCINATION HISTORY</strong></td>
<td></td>
</tr>
<tr>
<td>VACCINE/MEDICINE</td>
<td>Name of the vaccine/medicine provided followed by the provision date.</td>
</tr>
<tr>
<td><strong>VACCINATION ADD</strong></td>
<td></td>
</tr>
<tr>
<td>DEFAULT DATE</td>
<td>This date will default to the date set in Personal Settings – Vaccination Defaults. If a date has not been set in the Personal Settings, this date will default to “Today's” date by default. This date can be changed by typing a new date. The date entered here on this screen will last for the duration of the session. This date will copy or automatically populate into the DATE field to the right of the Vaccine name.</td>
</tr>
<tr>
<td>VACCINE</td>
<td>Name of the Vaccine for which you are adding a vaccination. Click the checkbox to insert a checkmark. If you do not see the desired vaccine in the list, click the drop-down menu arrow to view/select one.</td>
</tr>
<tr>
<td>DATE</td>
<td>Date the vaccine was given to the patient. This field is automatically populated from the “Default Date” field.</td>
</tr>
<tr>
<td>MANUFACTURER/LOT</td>
<td>Name of available manufacturer/lot numbers for the vaccine. If there is more than one lot, and you do not select a lot even if a campaign/tier has been selected, a warning message appears; select a lot in order to continue. When you click a radio button to select a lot, the checkbox automatically selects. If after selecting a radio button you decide to select a different lot's radio button, the first radio button and checkbox unselect; thus, only one vaccine lot can be selected at one time. Expired lots will not be included in the list. <strong>Note:</strong> Checking the checkbox will NOT automatically select the radio button.</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION OF USE</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>DOSE SIZE</td>
<td>This field will appear when the Administration Property – Mass Immunizations - Display Dose Size (Size/Kits) has been checked/enabled. This represents the dose size of the vaccine provided. For example:</td>
</tr>
<tr>
<td></td>
<td>Double</td>
</tr>
<tr>
<td></td>
<td>Full</td>
</tr>
<tr>
<td></td>
<td>Half</td>
</tr>
<tr>
<td></td>
<td>Triple</td>
</tr>
</tbody>
</table>

**CONTRAINDICATIONS ADD**

<table>
<thead>
<tr>
<th>VACCINE</th>
<th>Name of the Vaccine for which you are adding a contraindication. Click the checkbox to insert a checkmark.</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONTRAINDICATION</td>
<td>Type of contraindication for the Vaccine. Click the “Click to Select” hyperlink to the far right of the Vaccine. The “Select Contraindication” window appears.</td>
</tr>
</tbody>
</table>

Click the drop-down menu arrow to view/select a valid contraindication and then click one of the available buttons:

- **CANCEL** – to abort making a selection and return to the previous window.
- **CLEAR** – to erase a selection and return to the previous window.
- **SELECT** – to select the contraindication and copy it to the previous window. The Vaccine name will automatically get checked.

2. Make your selections by clicking/typing the data.
3. Click one of the available buttons:

- **CANCEL** – to abort saving and return to the “Patient Search” window.
- **SAVE** – to save all entries made on the window and return to the “Patient Search” window.
- **CAPTURE BARCODE** – to capture/scan the Vaccine barcode.

**Figure 9-8: Scan Now Prompt**

![Figure 9-8: Scan Now Prompt](image)

a) Point the scanner to the barcode and **SCAN** the barcode label.

b) Click **OK**. The barcode information is copied into the appropriate fields (Vaccine/Medicine, Manufacture, and Lot)

c) Click the **SAVE** button.

**EDITING A MASS IMMUNIZATIONS PATIENT**

To edit a patient, a **PATIENT SEARCH** must be done first.

1. From the **PATIENT** menu, click on the **SEARCH/ADD** option. The “Patient Search” window appears. Refer to Figure 9-1 for an illustration.

2. Assuming a match was found; select the desired patient by clicking the **SELECT ARROW**. The “Patient Edit” window appears.
3. Refer to Table 9-2 for a list of field descriptions.

4. Make the editing changes and then click one of the available buttons:
   - **CANCEL** – to abort saving and return to the “Patient Search” window.
   - **SAVE** – to save all entries made on the window and return to the “Patient Search” window.
   - **SAVE & QUEUE** – saves any changes (must select a vaccination prior to clicking the button), queues
the patient to the Waitlist Room to await an immunization/vaccination, and displays the print options for the Patient Vaccination Record.

**Figure 9-10: Patient Vaccination Record - Sample**

![Patient Vaccination Record](image)

**VIEWING THE WAITING ROOM**

The Waiting Room option displays the patients that are waiting to be immunized/vaccinated. Patients get queued from the “Patient Demographics” screen. Users can select the patient, defer them, and/or remove them from the Waitlist Queue.

**Note:** Users must have the “Mass Immunization permission with a Facility that has the field, “Waiting Room” enabled.
The “Waitlist Managers” will call the first name on the list and work their way down through the list. When the patient from the Waitlist Queue presents to the Vaccination station, they are selected, and then the “Vaccination View/Add” screen appears. If a patient does not respond when their name is called, they can be deferred. Deferred patients remain at the top of the list but are placed in the “Deferred Patients” section. If the patient does not respond after a couple of cycles or for voluntary reasons, the name can be removed from the list via the REMOVE button.

1. From the PATIENT MENU, click on the WAITING ROOM option. The “Administration Waitlist” appears.

![Figure 9-11: Administration Waitlist](image)

2. The fields and their descriptions are listed in the table.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL PATIENTS IN QUEUE</td>
<td>Total number of patients queued.</td>
</tr>
<tr>
<td>TOTAL PATIENTS DEFERRED</td>
<td>Total number of patients deferred.</td>
</tr>
<tr>
<td>DEFERRED PATIENTS</td>
<td>Contains the SELECT ARROW to allow you to select the “deferred” patient.</td>
</tr>
<tr>
<td>FIRST NAME</td>
<td>Patient’s first name.</td>
</tr>
<tr>
<td>MIDDLE NAME</td>
<td>Patient’s middle name.</td>
</tr>
<tr>
<td>LAST NAME</td>
<td>Patient’s last name.</td>
</tr>
<tr>
<td>BIRTH DATE</td>
<td>Patient’s data of birth.</td>
</tr>
</tbody>
</table>
3. Determine the action to perform:

- Click the **SELECT ARROW** if you are going to select the patient to provide a Vaccination/Medication. The “Patient Edit – Vaccination/Medication Add” window appears. Continue to the section titled, “Adding a Mass Immunizations Vaccination and/or Contraindication” for instructions.

- Click the **REMOVE** button to remove the patient from the Waitlist Room. A “Confirmation Message” appears. Click **OK** to confirm or **CANCEL** to keep the patient in the Waitlist Queue.

- Click the **DEFER** button to delay the patient and place them into the Deferred section of the window. Once a patient is deferred, you can either **SELECT** them or **REMOVE** them.
10 MASS IMMUNIZATIONS REPORTS MENU

The REPORTS menu has one option—the Reports Module. The available reports will be displayed. The reports will be listed within this section by the report title and in alphabetical order.

ACCESSING THE MASS IMMUNIZATIONS REPORTS MODULE

To access the Reports Module and the specific report, perform the following steps:

1. From the Reports Menu, click on the option titled, Reports Module. The "Reports Menu" appears.

2. Click on the desired REPORT TITLE. The report's limitation/selection window appears.

3. Refer to the actual report title for instructions on running/printing the report.

MASS IMMUNIZATIONS – PATIENT RECORD

In order to obtain a Patient Record report, a patient search must be performed first, and then all childhood vaccines will appear.

1. From the REPORTS menu, point and click on the PATIENT RECORD option. The “Print Patient Record” limitation window appears.
2. The fields and their descriptions are listed in the table.

Table 10-1: Print Patient Record Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PATIENT INFORMATION TO INCLUDE</strong></td>
<td>Click on either radio button to:</td>
</tr>
<tr>
<td></td>
<td>• Do Not Include Confidential Information – (SSN, Race, Ethnicity, Medicaid Number, Birth File Number, Address, Phone, District, and Country/Parish). This is the default setting.</td>
</tr>
<tr>
<td></td>
<td>• Include Confidential Information</td>
</tr>
<tr>
<td><strong>VACCINATION INFORMATION TO INCLUDE</strong></td>
<td>(State-configurable option via Administration – Properties – Vaccination Settings – Enable Enter Confidential Vaccines; thus will display if configured).</td>
</tr>
<tr>
<td></td>
<td>Click on either radio button to:</td>
</tr>
<tr>
<td></td>
<td>• Do Not Include Confidential Information – (Excludes Confidential Vaccines (adolescents receiving HepB and HPV), click the radio button.) This is the default setting.</td>
</tr>
<tr>
<td></td>
<td>• Include Confidential Information</td>
</tr>
</tbody>
</table>
Note: This field will not be imported via the DTT or HL7. In Vaccination Deduplication, if any matching record is marked as Confidential, all records will be updated to confidential to ensure that the vaccination maintains its confidential status.

VACCINATION RECORD CHOICES

Click on the radio button to display and print one of the respective reports. The reports are:

- All Recorded Vaccinations – Reveals a breakdown per vaccine name.
- Immunization Record (Summary) – Reveals a Summary of Vaccine Families. This report is the default report and is sometimes referred to as the “Vaccination Summary Report.”
- Forecast – Reveals the Forecast or dates that were/are scheduled for each Vaccine.

PRINTABLE BORDERS (ENABLE TABLE BORDERS)

To print “table borders” around the data, click the checkbox.

3. Regardless of the report chosen, each report will contain the same type of information at the top; however, the report title will be reflected in the second line.

Note: The application must be configured to display a barcode; otherwise, the patient ID number will display.

4. Point and click the CREATE REPORT button. The report will display and be available for you to print. Report samples can be located on the next three pages.

ALL RECORDED VACCINATIONS

This report reveals a breakdown per vaccine name and Lead Blood Draw, and/or PPD if entered. The illustration shown excludes confidential information.
The application must be configured to display a barcode; otherwise, the patient ID number will display.

**Figure 10-3: All Recorded Vaccinations**

<table>
<thead>
<tr>
<th>Vaccine Name</th>
<th>Dose 1</th>
<th>Dose 2</th>
<th>Dose 3</th>
<th>Dose 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Influenza 10+ yrs pres free</td>
<td>09/30/2009</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Summary**

This report reveals a summary of vaccine families. The illustration shown excludes confidential information. If the barcode font and application are not configured, a patient ID will display instead of a barcode label.
The state of Louisiana can configure their application to separate Tdap from the DTap/Td family.

**Note:** A state-configurable administrative option is available to display the patient’s age at the time of immunization for the same vaccine family.

![Immunization Record Summary](image)

<table>
<thead>
<tr>
<th>Vaccine Family</th>
<th>Dose 1</th>
<th>Dose 2</th>
<th>Dose 3</th>
<th>Dose 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Influenza</td>
<td>09/30/2009</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Next Vaccine Due: HEP-B 3 DOSE**  Recommended Due Date: 07/01/1995

This is a valid immunization record from IRS.

Signature of physician or authorized representative of health agency.
**FORECAST**

This report reveals a summary of vaccine families.

*Note:* The application must be configured to display a barcode; otherwise, the patient ID number will display.

**Figure 10-5: Forecast**

<table>
<thead>
<tr>
<th>Vaccine Family</th>
<th>Dose</th>
<th>Scheduled Date</th>
<th>Minimum Valid Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>HEP-B 3 DOSE**</td>
<td>1</td>
<td>07/01/1995</td>
<td>07/01/1995</td>
</tr>
<tr>
<td>DTaP/DTP/Td/TdTdap*</td>
<td>1</td>
<td>09/01/1995</td>
<td>08/12/1995</td>
</tr>
<tr>
<td>POLIO</td>
<td>1</td>
<td>09/01/1995</td>
<td>08/12/1995</td>
</tr>
<tr>
<td>FLU</td>
<td>1</td>
<td>01/01/1996</td>
<td>01/01/1996</td>
</tr>
<tr>
<td>HEP-A</td>
<td>1</td>
<td>07/01/1996</td>
<td>07/01/1996</td>
</tr>
<tr>
<td>MMR</td>
<td>1</td>
<td>07/01/1996</td>
<td>07/01/1996</td>
</tr>
<tr>
<td>VARICELLA</td>
<td>1</td>
<td>07/01/1996</td>
<td>07/01/1996</td>
</tr>
<tr>
<td>HEP-B 2 DOSE**</td>
<td>1</td>
<td>07/01/2006</td>
<td>07/01/2006</td>
</tr>
<tr>
<td>MENINGOCOCCAL</td>
<td>1</td>
<td>07/01/2006</td>
<td>07/01/2006</td>
</tr>
</tbody>
</table>

* DTaP or DT should be given to patients under 7 years of age. Td should be given to patients over 7 years of age. Patients over the age of 11 should receive one dose of Tdap.

**If an adolescent has already begun the routine 3 dose Hepatitis B schedule, they should not be changed to the 2 dose schedule.**
**MASS IMMUNIZATIONS - DAILY PATIENT IMMUNIZATION**

This report lists all of the immunizations given on a specific date and can be listed by IRMS, Facility/Facility Group, VFC PIN, School, and/or vaccinator.

The Vaccination/Medication table in Mass Immunizations is populated with antivirals that are available for selection as an administered countermeasure in Mass Immunizations Modules. An administrative setting is used to enable Antivirals via Administration – Additional Registry Settings – Vaccine Display Label. Change the “Vaccine Display Label” to “Vaccines and Medicines.” Antivirals/medications will not be included on the list of available vaccines to administer in Core IWeb; however, they will show up on the “Vaccination View/Add” screen if they have been administered in Mass Immunizations. Both the Patient Detail Report and the Daily Patient Immunization List in Mass Immunizations will include antivirals in their output.

1. Point and click on the DAILY PATIENT IMMUNIZATION LIST report’s title. The report's parameter window appears.

   **Figure 10-6: Mass Immunizations Daily Patient Immunization List Parameters**

2. The fields and their descriptions are listed in the table:
Table 10-2: Mass Immunizations Daily Patient Immunization List

Parameter Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION OF USE</th>
</tr>
</thead>
<tbody>
<tr>
<td>SHOTS GIVEN ON THIS DATE</td>
<td>Type the date using the format mmddyyyy.</td>
</tr>
<tr>
<td>IRMS</td>
<td>To limit the report by a specific IRMS, click the drop-down menu arrow to view/select a valid choice.</td>
</tr>
<tr>
<td>FACILITY GROUP</td>
<td>To limit the report by a specific FACILITY or FACILITY GROUP, click the drop-down menu arrow to view/select a valid choice; otherwise, leave the DO NOT LIMIT radio button selected. Upon selecting a Facility/Facility Group, the radio button will also select.</td>
</tr>
<tr>
<td>DO NOT LIMIT</td>
<td></td>
</tr>
<tr>
<td>VFC PIN</td>
<td>Vaccines For Children (VFC) Personal Identification Number (PIN).</td>
</tr>
<tr>
<td>SCHOOL DO NOT LIMIT</td>
<td>To limit the report by a specific SCHOOL, click on the “Click to Select” hyperlink. The “Select School” window appears.</td>
</tr>
</tbody>
</table>

For SCHOOL:
- Click the drop-down menu arrow to view/select a STATE. This prepares the COUNTY field.
- Click the drop-down menu arrow to view/select a COUNTY or leave the ALL radio button selected.
- Click the drop-down menu arrow to view/select a SCHOOL DISTRICT.
- Click one of the radio buttons for the school TYPE (All, Public Only, or Private Only)
- In the NAME field, type a portion of the
Mass Immunizations Reports Menu

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION OF USE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>school name and then click on the appropriate radio button (Begins with or Contains).</td>
</tr>
<tr>
<td></td>
<td>• Click the SEARCH (or ENTER KEY) button. If any matches are found, they will appear in the “Search Results” section of the window.</td>
</tr>
<tr>
<td></td>
<td>• Click one of the available buttons: SELECT ARROW to select a match; CANCEL to not select a school and return to the previous window; CLEAR to erase any newly selected/entered text and remain on the same window.</td>
</tr>
</tbody>
</table>

VACCINATOR

To limit the report by a specific VACCINATOR, click the drop-down menu arrow to view/select a valid choice.

HIDE DOSE NUMBER

If you are experiencing performance issues regarding the report generation, click this checkbox to improve performance.

3. Select the desired parameters for the report and click one of the available buttons:

   • BACK – to return to the previous window without running the report.
   • RESET – to erase any newly entered/selected text and remain on the same window.
   • CREATE REPORT – to begin generating the report and display the report in a new window.
MASS IMMUNIZATIONS - PATIENT DETAIL REPORT (BY OWNERSHIP OR SERVICE)

This report displays detailed information about patients that are owned or serviced by the user's IRMS/Facility and the vaccinations their patients received, along with any contraindications (if any).

The Vaccination/Medication table in Mass Immunizations is populated with antivirals that are available for selection as an administered countermeasure in Mass Immunizations Modules. An administrative setting is used to enable Antivirals via Administration – Additional Registry Settings – Vaccine Display Label. Change the “Vaccine Display Label” to “Vaccines and Medicines.” Antivirals/medications will not be included on the list of available vaccines to administer in Core IWeb; however, they will show up on the “Vaccination View/Add” screen if they have been administered in Mass Immunizations. Both the Patient Detail Report and the Daily Patient Immunization List in Mass Immunizations will include antivirals in their output.

During mass immunization events, the EOC personnel need the ability to display aggregates of total patients vaccinated in various ways. Examples include the totals per zip code per parish; race or...
ethnicity per parish - any combinations that make logical sense within the current options on "Select Report Type" for the current Patient Totals report.

1. Point and click on the **PATIENT DETAIL** report’s title. The report's parameter window appears.

   **Figure 10-8: Mass Immunizations Patient Detail Report by Ownership Limitations**

2. The fields and their descriptions are listed in the table:
Table 10-3: Mass Immunizations Patient Detail Report Parameter Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION OF USE</th>
</tr>
</thead>
<tbody>
<tr>
<td>RUN BY</td>
<td>There are two options to run this report: Ownership or Service. Click the radio button for the desired choice.</td>
</tr>
<tr>
<td>VACCINATION DATE RANGE</td>
<td>To limit the report by a specific date range, type the FROM and TO dates in the provided fields.</td>
</tr>
<tr>
<td>BIRTH DATE RANGE</td>
<td>To limit the report by a specific date range, type the FROM and TO dates in the provided fields.</td>
</tr>
<tr>
<td>IRMS</td>
<td>To limit the report by a specific IRMS, click the drop-down menu arrow to view/select a valid choice.</td>
</tr>
<tr>
<td>FACILITY/FACILITY GROUP DO NO LIMIT</td>
<td>To limit the report by a specific FACILITY/FACILITY GROUP, click the drop-down menu arrow to view/select a valid choice; otherwise, leave the DO NOT LIMIT radio button selected.</td>
</tr>
<tr>
<td>VFC PIN</td>
<td>Vaccines For Children (VFC) Personal Identification Number (PIN).</td>
</tr>
<tr>
<td>CAMPAIGN</td>
<td>To limit the report for a specific CAMPAIGN, click the drop-down menu arrow to view/select a valid choice.</td>
</tr>
<tr>
<td>TIER</td>
<td>To limit the report for a specific TIER associated with a CAMPAIGN, click the drop-down menu arrow to view/select a valid choice.</td>
</tr>
</tbody>
</table>
| STATE                        | To limit the report for a specific STATE, click the drop-down menu arrow to view/select a valid choice.  
  **Note:** State must be selected before County/Parish can be selected. |
<p>| COUNTY/PARISH                | To limit the report for a specific COUNTY/PARISH, click the drop-down menu arrow to view/select a valid choice. |
| ZIP CODE                     | To limit the report for a specific ZIP CODE, type the zip code number in the field (5 or 9-digits) |
| PRIMARY CARE PHYSICIAN       | To limit the report for a specific PRIMARY CARE PHYSICIAN, click the drop-down menu |</p>
<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION OF USE</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROGRAM</td>
<td>To limit the report for a specific PROGRAM, click the drop-down menu arrow to view/select a valid choice.</td>
</tr>
<tr>
<td>HEALTH PLAN</td>
<td>To limit the report for a specific HEALTH PLAN, click the drop-down menu arrow to view/select a valid choice.</td>
</tr>
<tr>
<td>RACE</td>
<td>To limit the report by a specific RACE, click the up/down menu arrows to view/select from the list.</td>
</tr>
<tr>
<td>VFC CODE</td>
<td>To limit the report by a specific VFC CODE, click the drop-down menu arrow to view/select a valid choice.</td>
</tr>
<tr>
<td>INACTIVE STATUS</td>
<td>To limit the report by a specific PATIENT STATUS, click the drop-down menu arrow to view/select a valid choice. Examples are:</td>
</tr>
<tr>
<td>VACCINE</td>
<td>To limit the report by a specific vaccine and/or medicine, click the drop-down menu arrow to view/select a valid choice. Note: There is an administrative property setting for Mass Immunizations to specify Medicines, Vaccines, or Vaccines and Medicines in the drop-down list.</td>
</tr>
<tr>
<td>LOT NUMBER</td>
<td>To limit the report by a specific LOT NUMBER, click the drop-down menu arrow to view/select a valid choice.</td>
</tr>
<tr>
<td>DISTRICT/REGION</td>
<td>To limit the report by a specific DISTRICT or REGION, type the number into the provided field.</td>
</tr>
<tr>
<td>SCHOOL \n DO NOT LIMIT</td>
<td>To limit the report by a specific SCHOOL, click on the &quot;Click to Select&quot; hyperlink. The &quot;Select School&quot; window appears.</td>
</tr>
</tbody>
</table>
Click the drop-down menu arrow to view/select a STATE. This prepares the COUNTY field.

Click the drop-down menu arrow to view/select a COUNTY or leave the ALL radio button selected.

Click the drop-down menu arrow to view/select a SCHOOL DISTRICT.

Click one of the radio buttons for the school TYPE (All, Public Only, or Private Only)

In the NAME field, type a portion of the school name and then click on the appropriate radio button (Begins with or Contains).

Click the SEARCH (or ENTER KEY) button. If any matches are found, they will appear in the “Search Results” section of the window.

Click one of the available buttons: SELECT ARROW to select a match; CANCEL to not select a school and return to the previous window; CLEAR to erase any newly selected/entered text and remain on the same window.

**ONLY SHOW PATIENT INFO**

To display only the patient information, click the checkbox. Click it again to remove the checkmark.

**SORT BY**

To indicate how the data should appear on the report. Examples are:

- Last Name
3. Type/select data for the desired fields.

4. Click one of the available buttons:
   - **BACK** – to return to the previous window without running the report.
   - **RESET** – to erase any newly entered/selected text and remain on the same window.
   - **CREATE REPORT** – to begin generating the report and display the report in a new window.

Figure 10-9: Mass Immunizations Patient Detail Report Sample
MASS IMMUNIZATIONS - LOT NUMBER SUMMARY REPORT

This vaccination report displays a Summary of Vaccine Name, Lot Number, Manufacturer, Expiration Date, VFC Eligibility (Publicly Supplied), Number of Doses Available, Doses Used, Doses Wasted, Total Doses, and Inactive Status. This report can display Subtotals by Vaccine Name or by Aggregate Date per IRMS/Facility. You may also order the report by Manufacturer, Expiration Date, or Lot Number. When running the report by IRMS/Facility, output will be listed alphabetically.

Note: An “in-transit” column will appear on the report when the Administrative - Property is enabled and when the order is “Ready for State Approval.” The order will display on the Lot Number Summary as “In Transit.”

1. Point and click on the LOT NUMBER SUMMARY report’s title. The report's parameter window appears.

Figure 10-10: Lot Number Summary Report Parameters
2. The fields and their descriptions are listed in the table.

Table 10-4: Lot Number Summary Report Parameter Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>INCLUDE INACTIVE LOT NUMBERS</td>
<td>Point and click the checkbox if you want to include the “Inactive Lot Numbers” on the report.</td>
</tr>
<tr>
<td>INCLUDE EXPIRED LOTS</td>
<td>Point and click the checkbox if you want to include the “Expired Lots” on the report.</td>
</tr>
<tr>
<td>INCLUDE ORDERS/TRANSFERS QUANTITIES</td>
<td>Point and click the checkbox if you want to include the Orders/Transfers Quantities on the report.</td>
</tr>
<tr>
<td>LIMIT REPORT BY</td>
<td></td>
</tr>
<tr>
<td>REPORT DATE</td>
<td>To limit the report by a specific date range, type both the From and To dates into their respective fields.</td>
</tr>
<tr>
<td></td>
<td>Note: If the report is run by Report Date, the report will display a “Starting number of Doses” column. The Starting number of Doses will be the # of doses available at the beginning of the date range.</td>
</tr>
<tr>
<td>EXPIRATION DATE</td>
<td>To limit the report by a specific expiration date range, type both the From and To dates into their respective fields.</td>
</tr>
<tr>
<td>IRMS</td>
<td>To limit the report by a specific IRMS, click the drop-down menu arrow to view/select a valid choice.</td>
</tr>
<tr>
<td>FACILITY, FACILITY GROUP, DO NOT LIMIT</td>
<td>To limit the report by a specific Facility or Facility Group, click the drop-down menu arrow to view/select a valid choice from the respective fields.</td>
</tr>
<tr>
<td>VFC PIN</td>
<td>To limit the report by a specific VFC PIN, click the drop-down menu arrow to view/select a valid choice.</td>
</tr>
<tr>
<td>MANUFACTURER</td>
<td>To limit the report by a specific manufacturer, click the drop-down menu arrow to view/select a valid choice.</td>
</tr>
<tr>
<td>VACCINE NAME</td>
<td>To limit the report by a specific vaccine and/or medicine, click the drop-down menu arrow to view/select a valid choice.</td>
</tr>
</tbody>
</table>

Note: There is an administrative property
<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>PUBLICLY SUPPLIED ONLY</td>
<td>To limit the report by Publicly Supplied Vaccines, click the checkbox to select/deselect it</td>
</tr>
<tr>
<td>DISPLAY BY</td>
<td></td>
</tr>
<tr>
<td>SUBTOTAL BY VACCINE</td>
<td>This option is used to display subtotals by vaccine name.</td>
</tr>
<tr>
<td>AGGREGATE BY IRMS/FACILITY</td>
<td>This option is used to display aggregate (combined) totals per IRMS or Facility.</td>
</tr>
<tr>
<td>SEPARATE REPORTS BY CALENDAR MONTH</td>
<td>This option is used to separate the reports by calendar month.</td>
</tr>
<tr>
<td>ORDER BY</td>
<td></td>
</tr>
<tr>
<td>MANUFACTURER</td>
<td>This option groups the report by manufacturer name.</td>
</tr>
<tr>
<td>EXPIRATION DATE</td>
<td>This option groups the report by expiration date.</td>
</tr>
<tr>
<td>LOT NUMBER</td>
<td>This option groups the report by lot number.</td>
</tr>
</tbody>
</table>

3. Type/select data for the desired fields.

4. Click one of the available buttons:
   - **BACK** – to return to the previous window without running the report.
   - **RESET** – to erase any newly entered/selected text and remain on the same window.
   - **CREATE REPORT** – to begin generating the report and display the report in a new window.
## Lot Number Summary Report

**Manufacturer**

**Lot Number Summary**

**Report Criteria:**
- **IRMIS:** 1000 - CLIENT_SERVER_INTERNAL_IRMIS_ID
- **Facility:** All
- **Vaccine Name:** All
- **Manufacturer:** All
- **Expiration Date Range:** All
- **Report Date Range:** 09/11/2009 to 10/31/2009

**Report Completed By:** SHERRI K W SHERRI RC

**Publicly Supplied Only:** No

**Notes:** This report was run for a limited date range. All inventory counts displayed (Doses Available, Doses Total, etc.) reflect the inventory during that period of time only.

<table>
<thead>
<tr>
<th>Lot Number</th>
<th>Vaccine Name</th>
<th>Manufacturer</th>
<th>Expiry</th>
<th>Publicly Supplied</th>
<th>Ending Doses</th>
<th>Starting Doses</th>
<th>Doses Adjusted</th>
<th>Doses Used</th>
<th>Doses Wasted</th>
<th>Doses Returned</th>
<th>Doses Transferred In</th>
<th>Doses Transferred Out</th>
<th>Doses Visible Return</th>
<th>Total Doses</th>
</tr>
</thead>
<tbody>
<tr>
<td>H1N1_Medal</td>
<td>SD-2</td>
<td>ADI</td>
<td>3/31/2010</td>
<td>Y</td>
<td>250</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>250</td>
<td>0</td>
<td>0</td>
<td>250</td>
</tr>
<tr>
<td>H1N1_Medal</td>
<td>SD-3</td>
<td>AGA</td>
<td>3/31/2010</td>
<td>Y</td>
<td>150</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>150</td>
<td>0</td>
<td>0</td>
<td>150</td>
</tr>
</tbody>
</table>

**Total for H1N1_Medal:**
- **400** Doses Available
- **400** Doses Total
- **150** Doses Used
- **250** Doses Visible Return
- **400** Total Doses
[This page intentionally left blank.]
11 MASS IMMUNIZATIONS REMINDER RECALL

**Note:** The Reminder Recall menu will not appear if you are not authorized to access it.

Reminder Recall is used when you want to notify patients about upcoming or past due vaccinations. Only the patients you own will be included in the Reminder Recall results.

The result of this notification can be any of the following items:

- Patient Listing Report
- Mailing Labels
- Postcards or Letters
- Auto Dialer
- Mail Merge
- Email Reminders

Each time the Reminder/Recall is generated, a running total per patient is incremented by one unless you check the box indicating, "**Not to Increment the Recall Count.**" Additionally, there is a state-configurable option that will check this box as a default; however, you may uncheck it when necessary.

The state administrator has the option of deciding what patient address a user has to print on the Reminder Recall output options. If the option is enabled,

- IRMS Client users will be able to print the address from the database’s reserve table which is the address located on the “Patient Demographics” window.
- Registry Client users will continue to pull the address from the database’s master record.
MASS IMMUNIZATIONS REMINDER RECALL PRINTER SETUP

When running the Reminder Recall and you plan to print the output, perform the following; otherwise, continue to the next section titled, “Mass Immunizations - Running Reminder Recall.”

1. Verify your Browser has been setup properly so headers and footers do not print on the output. Postcards require you to change the margins.

2. Point and click on the FILE menu and choose the PAGE SETUP option. The “Page Setup” dialog box appears. 

Figure 11-1: Mass Immunizations Reminder Recall Page Setup

3. If any text is in the Header and Footer text boxes, delete it.
4. Set the **Margins** as follows:
   - Top = 0.75
   - All Others = 0.25

5. Click the **OK** button.

If your system is used for other types of printing tasks, you may want to check these settings before printing Reminder Recalls.

**MASS IMMUNIZATIONS - RUNNING REMINDER RECALL**

Reminder Recall can be run in “real-time” or can be setup to be scheduled.

To run Reminder Recall, perform the following steps; otherwise, continue to the section titled, “Scheduling Reminder Recall.”

1. Click the **REMINDER RECALL** menu/option. The “Reminder Recall Parameters” window appears.
2. The fields and their descriptions are listed in the table:
Table 11-1: Mass Immunizations Reminder Recall Parameter Field Descriptions

<table>
<thead>
<tr>
<th>ITEM</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>DO NOT INCREMENT RECALL COUNT</td>
<td>Ordinarily when Reminder/Recall is run, a “count” is added to the patient’s record. Once the threshold (Maximum Recall Tries) is reached, the patient will no longer receive reminders/recalls. The recall count is reset for a patient once a historical or administered vaccination is entered. Note: A default setting is available under the Settings Menu – User Preferences that when “checked” automatically populates this field with a checkmark. This is useful when you want to do a “practice” run to view the number of patients that are to be reminded or recalled. You can uncheck it if you want to increment the recall count.</td>
</tr>
<tr>
<td>PREVIEW AND SELECT PATIENTS</td>
<td>If you want the opportunity to preview and edit (select patients) the final list, point and click the Preview and Select Patients checkbox. The recall count does not get incremented for patients that are removed from the recall list.</td>
</tr>
<tr>
<td>REMINDER/RECALL DATE RANGE (FROM AND TO)</td>
<td>The “From” and “To” dates have defaults that can be changed. Point and click the portion of the date you want to change. The date must be entered in MM/DD/YYYY format and both fields MUST have a date. Note: If this is for a reminder, enter future date range; otherwise, if this is a recall, enter historic date range.</td>
</tr>
<tr>
<td>MAXIMUM RECALL TRIES</td>
<td>This is the total times a recall will be sent to a patient that has not responded by getting his immunization(s). A default of 5 is automatically selected. Point and click on the drop-down arrow to choose a new value, if desired. The maximum is 20.</td>
</tr>
<tr>
<td>VALID Addresses</td>
<td>This is to select only those patients that have: Valid Addresses Only, Invalid Addresses Only</td>
</tr>
</tbody>
</table>


<table>
<thead>
<tr>
<th>ITEM</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ITEM</strong></td>
<td><strong>DESCRIPTION</strong></td>
</tr>
<tr>
<td>All Patients (Valid and Invalid)</td>
<td>Allows you to place limitations on the “checked” items; thus, limiting the data that is to be retrieved.</td>
</tr>
<tr>
<td>LIMIT REMINDER/RECALL GROUP BY</td>
<td></td>
</tr>
<tr>
<td>IRMS DO NOT LIMIT</td>
<td>As a default, the Do Not Limit radio button will be checked.</td>
</tr>
</tbody>
</table>
| FACILITY DO NOT LIMIT | As a default, the Do Not Limit radio button will be checked. If you want to generate the list by Facility, point and click on the drop-down menu to see a list. When you make a selection from the list, the radio button will automatically select.  
**Note:** If a Facility Display (Abbreviated) Name was entered for the facility, it will appear in the list as opposed to the full name of the facility. |
| CAMPAIGN | Limits the Reminder Recall generation by the Campaign name. Click the drop-down menu arrow to view/select a valid choice. |
| TIER | Limits the Reminder Recall generation by Campaign Tier level. Click the drop-down menu arrow to view/select a valid choice. |
| VACCINE FAMILIES: AND OPTIONAL NEEDED DOSE NUMBER: | Allows specific Vaccine Families to be chosen for the Reminder/Recall generation. By default, all of the Vaccine Families are selected (checked). Optionally, you can type the Dose Number in the field provided to isolate to a specific dose number. |
| NAME OF PERSON RUNNING REMINDER/RECALL | Type the name of the person running the report. |
| CLICK HERE TO GO TO PREVIOUS RESULTS FROM RUN ON MONTH, DAY, YEAR, TIMESTAMP | Click on the “HERE” hyperlink to view the previous Reminder Recall results. |
3. Verify all your selections have been made and click one of the available buttons:

- **CLEAR** – to erase any newly made selections and remain on the window.
- **RESET** – to erase the fields to their default values.
- **SCHEDULE** – queues the Reminder Recall for Scheduling so it will run later. Refer to the section titled, “Scheduling Reminder Recall” for instructions.
- **RUN REMINDER RECALL** – begins the generation and displays the “Number of patients located in the recall group.”

Figure 11-3: Mass Immunizations Reminder Recall – Number of Patients Located

4. Click the **OK** button. The “Reminder Recall Output Selection” window appears along with two additional sections (Criteria Used, and Print Settings; illustrated below in three sections due to the window size).
Figure 11-4: Mass Immunizations Reminder Recall Select Output Type
5. Continue to the next section titled, “Selecting the Reminder Recall Output Type.”
**SELECTING THE MASS IMMUNIZATIONS REMINDER RECALL OUTPUT TYPE**

Regardless of the chosen “Output Type,” the process of selecting the output is the same. The output will display first providing the option to print.

1. From the “Reminder Recall Output Select” window, click the **SELECT** hyperlink on the same row as the desired output type. The descriptions of the “Output Types” are listed in the table:

   **Table 11-2: Mass Immunizations Reminder Recall Output Type Descriptions**

<table>
<thead>
<tr>
<th>OUTPUT TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUTO DIALER</td>
<td>Displays a comma-delimited file that can be saved as a TXT file.</td>
</tr>
<tr>
<td>EMAIL REMINDERS</td>
<td>Displays the patient, guardian, and email addresses of several patients on a list providing the option to send all the emails.</td>
</tr>
<tr>
<td>MAIL MERGE</td>
<td>Displays the patient information in a Microsoft Word file using the “pipe” delimiter. Refer to Microsoft Word’s online help for instructions regarding “Mail Merge.”</td>
</tr>
<tr>
<td>MAILING LABELS</td>
<td>(Avery 5160) Displays/prints three labels across and ten labels down, or thirty labels per sheet.</td>
</tr>
<tr>
<td>PATIENT LISTING</td>
<td>Displays/prints the report criteria, total patients selected, and chart number in order of last name for each patient listed.</td>
</tr>
<tr>
<td>POSTCARDS OR LETTERS</td>
<td>Displays the postcards in English, Spanish, or Patient Preferred language. When running postcards/letters, you can choose to use default content or define your own content.</td>
</tr>
</tbody>
</table>

2. **POSTCARDS** and **EMAIL REMINDERS** require additional steps **BEFORE** clicking the **SELECT**
hyperlink. Continue to the sections titled, “Postcards,” and “Email Reminders” for instructions.

3. Click the SELECT hyperlink for ALL other “Output Types” and then continue to that section for additional instructions (if any).

**MASS IMMUNIZATIONS - AUTO DIALER**

The file initially displays in a “comma delimited” file that can be saved as a TXT file.

![Figure 11-7: Mass Immunizations Reminder Recall – Auto Dialer File](image)

1. While the “comma delimited” file is displayed, point and right-mouse click inside the blue box.

2. Click the SELECT ALL command to highlight all the lines of the file.

3. Click on the COPY command and open up your preferred text editor, open a new file, and then choose PASTE.

4. SAVE the file to the preferred directory with the filetype of TXT.
MASS IMMUNIZATIONS - EMAIL REMINDERS

Email Reminders require “Pre-Select” steps; thus, before clicking the SELECT hyperlink, perform the following:

1. Type the **Facility Return Address** information into the respective fields:
   - Facility Name
   - Street
   - City, State, and Zip Code
   - Phone Number

2. Click the **SELECT** hyperlink. The Email List appears.

   Figure 11-8: Mass Immunizations Email Reminder List

3. Click one of the available buttons:
   - **CANCEL** – to abort sending the Emails and return to the “Output Select” window.
   - **SEND EMAILS** – to send the Emails.
**MASS IMMUNIZATIONS - MAIL MERGE**

The “Mail Merge” file requires a couple extra steps due to the “downloading” of the file.

1. Click the **SELECT** hyperlink. The “File Download” dialog box appears.

   **Figure 11-9: Mass Immunizations Reminder Recall – Mail Merge**

   ![File Download dialog box](image)

   **Do you want to open or save this file?**

   - Name: Mail_Merge.txt
   - Type: Text Document, 223 bytes
   - From: 10.0.8.86

   ![Open, Save, Cancel buttons]

   While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. **What’s the risk?**

2. Click one of the available buttons:

   - **SAVE** – to save the text file in the desired directory.
   - **CANCEL** – to abort the “File Download” and return to the “Output Select” window.
   - **OPEN** – to open the text file in MS Word.
3. Refer to the MS Word instructions for “Mail Merge.”

**MASS IMMUNIZATIONS - MAILING LABELS**

The Mailing Labels do not require any special steps.

1. Click the **SELECT** hyperlink. The “Mailing Labels” appear.

Figure 11-11: Mass Immunizations Reminder Recall – Mailing Labels
**MASS IMMUNIZATIONS - PATIENT LISTING**

The Patient Listing does not require any special steps.

1. Click the **SELECT** hyperlink. The “Patient Listing” appears.

**Figure 11-12: Mass Immunizations Reminder Recall – Patient Listing**

![Patient Recall Group Listing](image)

**MASS IMMUNIZATIONS - POSTCARDS OR LETTERS**

Email Reminders require “Pre-Select” steps; thus, before clicking the **SELECT** hyperlink, perform the following:

1. Determine whether you want to display/print **POSTCARDS** (Avery 8387) or **LETTERS** and click the corresponding radio button.
2. Choose the **OUTPUT LANGUAGE** by clicking the drop-down menu arrow.

3. Type the **Facility Return Address** information into the respective fields:
   - Facility Name
   - Street
   - City, State, and Zip Code
   - Phone Number

4. Click the **PREVIEW** hyperlink. Either the “Reminder Recall Postcard Options or the “Reminder Recall Letters Options” window appears. Both windows have a **DEFAULT** section and **USER DEFINED** section.
**Figure 11-13: Mass Immunizations Reminder Recall – Postcards Options**

```
Dear Parent or Guardian,
Our records indicate that your child may be due for one or more immunizations.
Please contact the clinic to discuss scheduling an appointment for getting your child vaccinated.
(If your child has been vaccinated by another provider, or is no longer a patient of this clinic, please advise so that we may update our records.)
We look forward to hearing from you soon.
```
5. Regardless of the Output Type, determine whether you want to use the “default” message or “customize” your own message.

- If accepting the “default” message, simply click the PRINT button. The “Postcards” will display.
If you want to “customize” the message, type the message in the **USER DEFINED** text box.

- Click the **USER DEFINED** radio button and then click the **SAVE & PRINT** button.
Figure 11-16: Mass Immunizations Reminder Recall – User Defined Postcards Output
Figure 11-17: Mass Immunizations Reminder Recall – Default Letters Output

From:
STC
8370 E Via De Ventura
Scottsdale, AZ 85258
(602)241-1502

To the Parent/Guardian of:

Dear Parent or Guardian,

Our records indicate that your child may be due for one or more immunizations. Please contact the clinic to discuss scheduling an appointment for getting your child vaccinated. (If your child has been vaccinated by another provider, or is no longer a patient of this clinic, please advise so that we may update our records.) We look forward to hearing from you soon.

From:
STC
8370 E Via De Ventura
Scottsdale, AZ 85258
(602)241-1502

To the Parent/Guardian of:

Dear Parent or Guardian,

Our records indicate that your child may be due for one or more immunizations. Please contact the clinic to discuss scheduling an appointment for getting your child vaccinated. (If your child has been vaccinated by another provider, or is no longer a patient of this clinic, please advise so that we may update our records.) We look forward to hearing from you soon.

From:
STC
8370 E Via De Ventura
Scottsdale, AZ 85258
(602)241-1502

To the Parent/Guardian of:

Dear Parent or Guardian,

Our records indicate that your child may be due for one or more immunizations. Please contact the clinic to discuss scheduling an appointment for getting your child vaccinated. (If your child has been vaccinated by another provider, or is no longer a patient of this clinic, please advise so that we may update our records.) We look forward to hearing from you soon.
Figure 11-18: Mass Immunizations Reminder Recall – User Defined Letters Output

From:

STC
8370 E Via De Ventura
Scottsdale, AZ 85258
902/241-1902

To the Parent/Guardian of: 

NAME1 LNAME1

PHOENIX, AZ

Dear Parent/Guardian,

Our records indicate that your child may be due for one or more immunizations.

Please call the clinic to schedule an appointment or to notify us that your child was vaccinated by another provider, or is no longer a patient of this clinic.

We look forward to hearing from you soon.

From:

STC
8370 E Via De Ventura
Scottsdale, AZ 85258
902/241-1902

To the Parent/Guardian of: 

JONH DOE

8370, E. VIA DE VENTURA
SCOTTSDALE, AZ 85258

Dear Parent/Guardian,

Our records indicate that your child may be due for one or more immunizations.

Please call the clinic to schedule an appointment or to notify us that your child was vaccinated by another provider, or is no longer a patient of this clinic.

We look forward to hearing from you soon.

From:

STC
8370 E Via De Ventura
Scottsdale, AZ 85258
902/241-1902

To the Parent/Guardian of: 

NAME2 LNAME2

PHOENIX, AZ

Dear Parent/Guardian,

Our records indicate that your child may be due for one or more immunizations.

Please call the clinic to schedule an appointment or to notify us that your child was vaccinated by another provider, or is no longer a patient of this clinic.

We look forward to hearing from you soon.
6. **CLOSE** the window and/or **PRINT** the file.

**MASS IMMUNIZATIONS - CREATING A SCHEDULE FOR REMINDER RECALL**

Only one schedule per IRMS can be created; thus, if a schedule exists and another one is created, it will overwrite the previous schedule.

To schedule the Reminder Recall to run, perform the following:

1. Click the **REMEMBER RECALL** menu/option. The “Reminder Recall Parameters” window appears. Refer to Figure 11-2 for an illustration of the window.

2. Refer to Table 11-1 for a list of field descriptions.

3. Verify all your selections have been made and click the **SCHEDULE** button. The “Scheduler” window appears along with the additional sections: Output Type, Reminder Recall Criteria Used, and the Reminder Recall Print Settings. Refer to the section titled, “Selecting the Mass Immunizations Reminder Recall Output Type” for additional information.
4. The fields and their descriptions are listed in the table:

Table 11-3: Mass Immunizations Reminder Recall Scheduler Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>RUN NOW</td>
<td>This checkbox will allow the Reminder Recall to run immediately and will not be added to the schedule; thus, is useful when you have a schedule setup but do not want to wait until the scheduled time.</td>
</tr>
<tr>
<td>MINUTE</td>
<td>The minutes that can be chosen are in five-minute intervals and will be used with the HOURS field to indicate the &quot;kick off&quot; time for the report to run. Click on the drop-down menu arrow to view/select</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>a valid choice.  “00” is the default.</td>
<td></td>
</tr>
<tr>
<td>HOUR</td>
<td>The hours are an hour apart and will be used with the MINUTES field to indicate the “kick off” time for the report to run. Click on the drop-down menu arrow to view/select a valid choice. “12 AM” is the default.</td>
</tr>
<tr>
<td>DAY OF MONTH</td>
<td>Specific day of the month the report should run. If a blank appears, the report will run EVERY DAY. Click on the drop-down menu arrow to view/select a valid choice. A “blank or every day” is the default.</td>
</tr>
<tr>
<td>MONTH</td>
<td>Specific month the report should run. If a blank appears, the report will run EVERY MONTH. Click on the drop-down menu arrow to view/select a valid choice. A “blank or every month” is the default.</td>
</tr>
<tr>
<td>DAY OF WEEK</td>
<td>Specific day of week the report should run. If a blank appears, the report will run EVERY DAY. Click on the drop-down menu arrow to view/select a valid choice. A “blank or every day” is the default.</td>
</tr>
<tr>
<td>IRMS</td>
<td>Select one or more IRMSes you want to send the report to. Note: Multiple selections can be made by holding down the CTRL key while clicking IRMSes.</td>
</tr>
<tr>
<td>FACILITY</td>
<td>Select one or more FACILITIES you want to send the report to. Note: Multiple selections can be made by holding down the CTRL key while clicking FACILITIES.</td>
</tr>
<tr>
<td>EMAIL</td>
<td>Type the email address the report should be sent to. If there is more than one email address, separate them with a comma.</td>
</tr>
</tbody>
</table>

5. Select the “Scheduling Criteria.

6. Click one of the available buttons:
   - BACK – to abort setting a schedule and return to the previous window.
• **SCHEDULE** – to save your changes and display the “User Scheduled Tasks” window.

Figure 11-20: Mass Immunizations User Scheduled Tasks

**EDITING THE MASS IMMUNIZATIONS SCHEDULE**

To edit the Reminder Recall Schedule, perform the following:

1. From the “User Scheduled Tasks” window, click on the **NAME** hyperlink. The “User Scheduled Tasks” window appears.

Figure 11-21: Mass Immunizations User Scheduled Tasks - Edit

2. Refer to Table 11-3 for a list of field descriptions.

3. Make the desired editing changes and then click one of the available buttons:
   - **CANCEL** – to abort changing the Schedule.
- **NEXT** – to redisplay the “User Scheduled Tasks” screen.

**MASS IMMUNIZATIONS - DELETING THE SCHEDULE**

To delete the Reminder Recall Schedule, perform the following:

1. From the “User Scheduled Tasks” window, click on the **DELETE** hyperlink. The **TASK** will immediately be removed/deleted from the list.

2. A message appears, “There are currently no reports scheduled” on the “User Scheduled Tasks” window.

**MASS IMMUNIZATIONS - VIEWING THE LOG**

To view the Scheduled Report Log, perform the following:

1. Click the **VIEW LOG** button on the “User Scheduled Tasks/Scheduler Status” window. The “Scheduled Report Log” window appears.

   ![Figure 11-22: Mass Immunizations Scheduled Report Log](image)

   2. The fields/columns and their descriptions are listed in the table:

   Table 11-4: Mass Immunizations Scheduled Report Log

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>USERNAME</td>
<td>User that scheduled the report.</td>
</tr>
<tr>
<td>DESCRIPTION</td>
<td>Report Description (Title).</td>
</tr>
<tr>
<td>BEGIN TIME</td>
<td>Time that the report began to run.</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>---------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>END TIME</td>
<td>Time the report completed running.</td>
</tr>
<tr>
<td>STATUS</td>
<td>Status of the report.</td>
</tr>
<tr>
<td>ERROR</td>
<td>Error text if the report didn’t run.</td>
</tr>
</tbody>
</table>

3. Click the **BACK** button to return to the “User Scheduled Tasks/Scheduler Status” window.