

# **MASS IMMUNIZATION APPLICATION USER GUIDE (WEB VERSION)**



**Scientific Technologies Corporation**



*Advancing Population Health Outcomes Through Information Technology*





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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



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## 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.



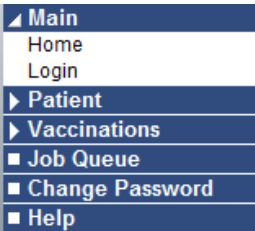

## 3 ABOUT THE MASS IMMUNIZATIONS APPLICATION

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

APPLICATION CHARACTERISTICS	
<b>MENUS / MENU OPTIONS</b> 	<p>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 "grayed" out, it is not an available option.</p> <ul style="list-style-type: none"><li>• A rotated triangle indicates the menu is open (illustrated on the Main menu).</li><li>• A triangle pointing right indicates the menu is closed.</li><li>• A square indicates a single menu without options.</li></ul> <p>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.</p>
<b>DROP-DOWN MENUS</b> 	<p>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.</p>
<b>MANDATORY FIELD ENTRIES</b>	<p><b>RED</b> field labels indicate an entry is required before proceeding.</p>
<b>CHECK BOXES</b>	<p>Press the <b>TAB</b> key to move through the checkboxes. Press the keyboard <b>SPACEBAR</b></p>



APPLICATION CHARACTERISTICS	
	(or point and click) to select the item next to the checkbox, or press it again to deselect the item.
<b>RADIO BUTTONS</b> 	Press the <b>TAB</b> key to move to the desired set of radio buttons. Press the directional keyboard <b>ARROW</b> (or point and click) to select (highlight) the desired radio button.
<b>SEARCHES &amp; SELECT ARROW(S)</b> 	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.
<b>Note:</b> 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**

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



### 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.,

#####

#### 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

### KEYBOARD, EDITING KEYS, AND MOUSE

#### TAB

All the fields have a "TAB" order. This means when the cursor is in a field and the TAB key is pressed, it will move the cursor to the next field.

#### SHIFT TAB

By pressing the "TAB with SHIFT," the cursor will move backward to the previous field.

#### ENTER

Pressing the "ENTER" key on most windows, executes the function to process the active page. For example, while on the Patient Search window, the ENTER key will execute the Search function.

An exception to this rule is when the TAB key is pressed that highlights a button, the ENTER key executes the button that is highlighted.

**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.



## KEYBOARD, EDITING KEYS, AND MOUSE

<b>CUT</b>	<p>Highlight the data to be cut, then perform one of the following:</p> <ul style="list-style-type: none"> <li>• CTRL + X</li> <li>• Right-click the mouse and select Cut from the menu</li> <li>• Select Edit from the toolbar and then select Cut</li> <li>• Shift + Delete</li> </ul>
<b>COPY</b>	<p>Highlight the data to copy, then perform one of the following:</p> <ul style="list-style-type: none"> <li>• CTRL + C</li> <li>• Right-click the mouse and select Copy from the menu</li> <li>• Select Edit from the toolbar and then select Copy</li> <li>• CTRL + Insert</li> </ul>
<b>PASTE</b>	<p>Left-click the mouse where you want to place the data and perform one of the following:</p> <ul style="list-style-type: none"> <li>• CTRL + V</li> <li>• Right-click the mouse and select Paste from the menu</li> <li>• Select Edit from the toolbar and then select Paste</li> <li>• Shift + Insert</li> </ul>
<b>SCROLL MOUSE</b>	<p>The scrolling mouse wheel can be used to scroll through selected drop-down lists and current web page, if the mouse is programmed correctly.</p>





## PREREQUISITE TO LOGGING IN – ENABLING SETTINGS

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

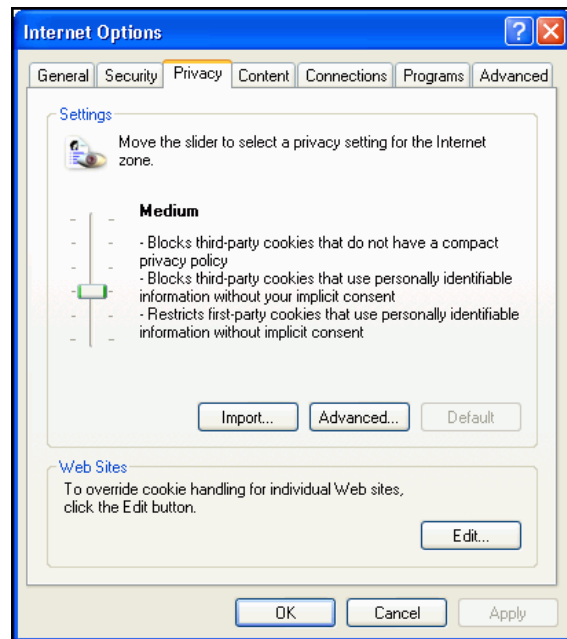
- **ENABLE** your browser to **ACCEPT COOKIES & SCRIPTING**.
- **DISABLE** your browser for **POP-UP BLOCKER**.

## 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.

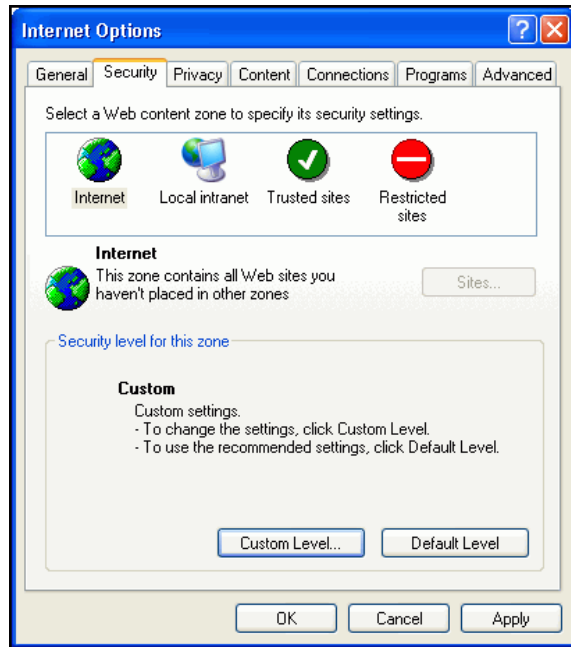
**Figure 3-1: Internet Options / Privacy Tab**





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:

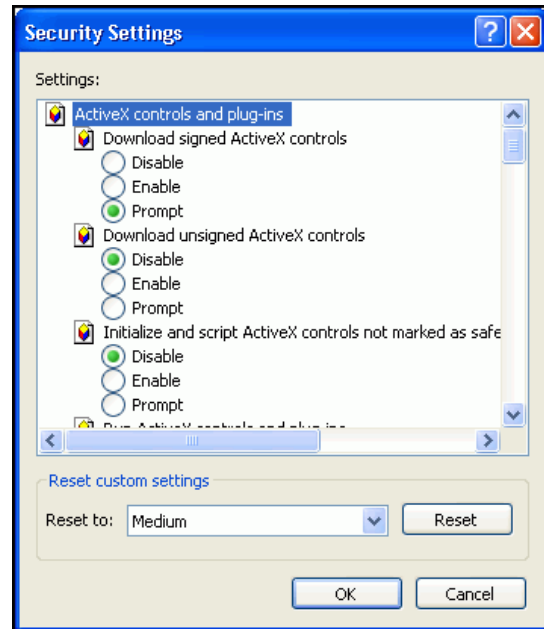
**Figure 3-2: Internet Options / Security Tab**



4. Click the **CUSTOM LEVEL...** button. The “Security Settings” window appears:

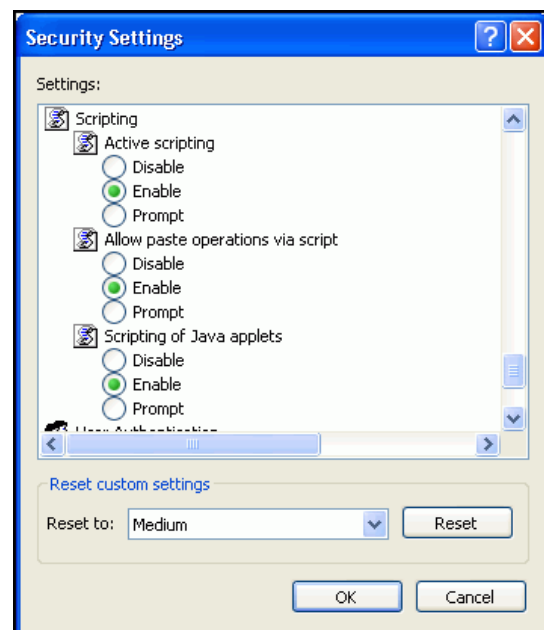


Figure 3-3: Security Settings



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.

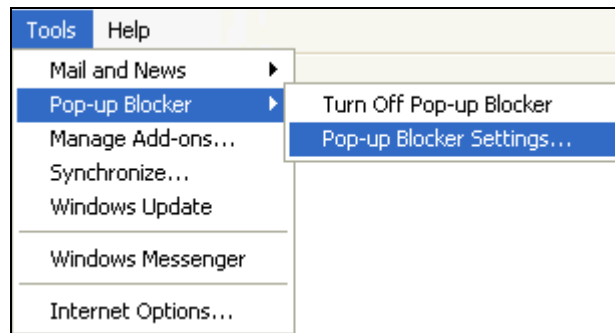


## CHANGING POP-UP BLOCKER SETTINGS

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

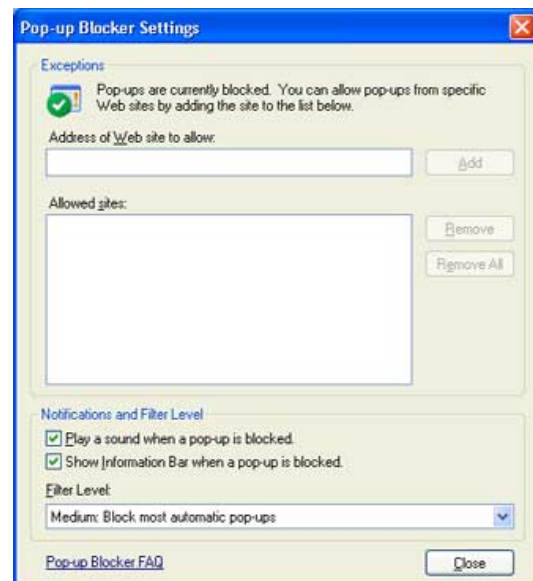
1. Open internet Explorer. On the Tools menu, point to Pop-up Blocker, and then click Pop-up Blocker Settings.

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





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## 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.



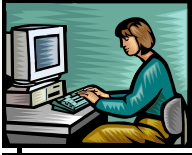
2. Turn on Pop-Up Blocker, by performing the following:
  - On the **TOOLS** menu, point to Pop-Up Blocker.
  - Click the **TURN ON POP-UP BLOCKER** option.



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## 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.

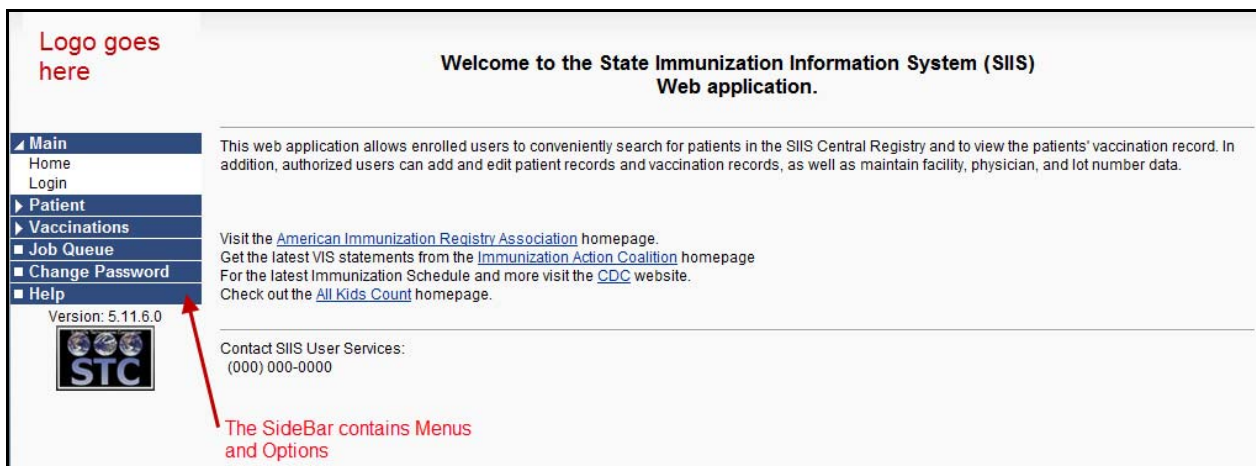
1. Open up your Internet Explorer (IE) and enter the web address for your state's immunization web site. For example:

<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

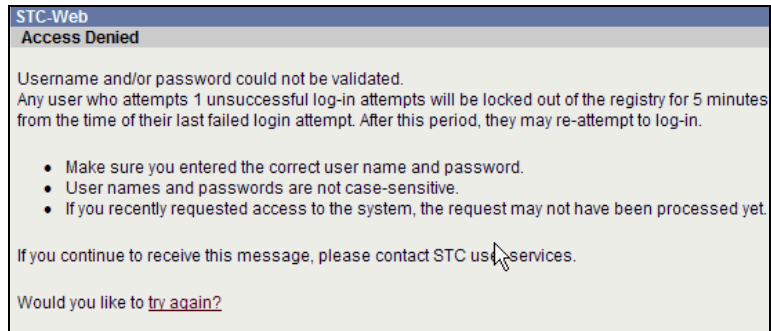
FIELD	DESCRIPTION
USERNAME	This is your login id that allows you to access the application.
PASSWORD	This is your confidential password that is associated with the Username and allows you to access the application.



- 
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.



Figure 4-4: Request Access to this Application

Request access to this application	
First Name:	<input type="text"/>
Middle Name:	<input type="text"/>
Last Name:	<input type="text"/>
Street:	<input type="text"/>
City:	<input type="text"/>
State:	Select <input type="button" value="v"/>
Zip:	<input type="text"/>
County/Parish:	<input type="button" value="v"/>
Work Phone:	<input type="text"/> ext: <input type="text"/>
Email:	<input type="text"/>
IRMS:	Select <input type="button" value="v"/>
Facility:	Select <input type="button" value="v"/>
<input type="button" value="Clear"/> <input type="button" value="Add"/>	

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

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

FIELD	DESCRIPTION
FIRST NAME	Type your first name. This is a required field.
MIDDLE NAME	Type your middle name (optional).
LAST NAME	Type your last name. This is a required field.
STREET	Type the street address (optional) of the location where you will be using the Username.
CITY	Name of the city where you will be using the username.
STATE	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.
ZIP	<p>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.</p> <p><b>Note:</b> The "Select Zip Code" dialog box will reappear when the City/State fields have been</p>



FIELD	DESCRIPTION
	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.
<b>COUNTY/PARISH OR BOROUGH/CENSUS</b>	Click the drop-down menu arrow to select a County or Parish/Borough or Census.
<b>WORK PHONE</b>	Phone number where you will be using the username.
<b>EXT</b>	Extension number at the location where you will be using the application.
<b>EMAIL</b>	Email address where your username and password can be sent.
<b>IRMS</b>	Click the drop-down menu arrow to select your IRMS identifier.
<b>FACILITY</b>	Click the drop-down menu arrow to select your FACILITY.

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”



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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.

**Figure 4-5: Forgot Password**

A screenshot of a web-based dialog box titled "STC-Forgot Password". The dialog has a light gray background and a blue header bar. Inside, there is a message: "Your password will be reset, and the new one emailed to your email address on file. Please enter either your Username or Email Address." Below this message are two input fields. The first is labeled "User Name:" and the second is labeled "Email:". Both fields are empty. At the bottom right of the dialog is a blue button labeled "Send".

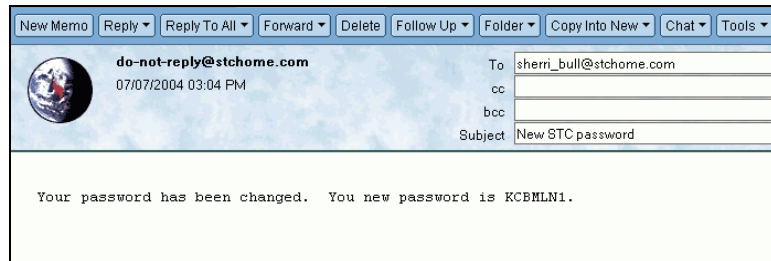
2. Type one of the following
  - **USERNAME** – type your username. If you type your username, your new password will be emailed to your email address on file.
  - **EMAIL** – type your email address. If you type our email address, your new password will be emailed to this email address versus the one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



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:



Figure 4-7: Select Application

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.

Figure 4-8: Select 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

Select IRMS	
Choose an IRMS for this session.	
IRMS #:	--select--
<button>Continue</button>	

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

Mass Immunizations	
Logged in: SHERRI K B	Date: December 28, 2009
IRMS/Facility: ABC (3000) / REGINA	
Patient Search	
Patient Information	
First Name or Initial:	<input type="text"/>
Last Name or Initial:	<input type="text"/>
Birth Date:	<input type="text"/>
<button>Run Search</button>	



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## 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**

A screenshot of a web browser window titled "Confidentiality Agreement". The window has a light blue header bar with the title. Below the header, the text is as follows:  
**Title :** New Confidential Agreement  
This is a new agreement that all users of the application must accept or decline.....  
**Agreement :**  
This is paragraph2 of the agreement.  
At the bottom right of the window, there are two buttons: "Accept" and "Decline".

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.



Figure 4-12: STC Web – Invalid Session

STC-Web
<b>Invalid Session</b>
The current session has expired or become invalid. To continue, please login again:
<ul style="list-style-type: none"><li>• First Responder: login <a href="#">here</a></li><li>• IWeb: login <a href="#">here</a></li></ul>
If you continue to receive this message after logging in, make sure your browser is configured to allow cookies. If the problem persists, please contact STC user services.

- Access is granted if the **USERNAME** and **PASSWORD** are accurate. The “Patient Search” window appears.

Figure 4-13: Mass Immunizations Patient Search

Patient Search	
<b>Patient Information</b>	
<b>First Name or Initial:</b>	<input type="text"/>
<b>Last Name or Initial:</b>	<input type="text"/>
<b>Birth Date:</b>	<input type="text"/>
<b>Capture Barcode</b>	<input type="text"/>
<input type="button" value="Search"/>	

- 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

Logged in: MASS IMM MODULE Date: November 2, 2007

Your password is within One Week of expiring, you can change it below.  
If you prefer to continue without updating your password, please click 'Skip'

Change Password	
Current Password:	<input type="text"/>
New Password:	<input type="text"/>
New Password (again):	<input type="text"/>

Reset Submit Skip

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

Figure 4-15: Access Denied

STC.Web

**Access Denied**

Username and/or password could not be validated.

- Make sure you entered the correct user name and password.
- User names and passwords are not case-sensitive.
- If you recently requested access to the system, the request may not have been processed yet.

If you continue to receive this message, please contact STC user services.

Would you like to [try again?](#)

- 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.

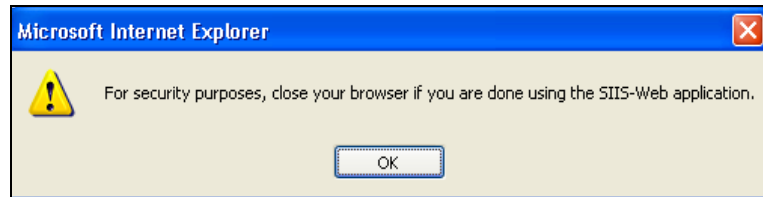
## LOGGING OUT

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.

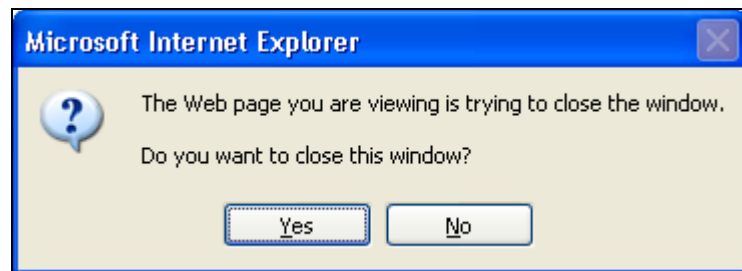


**Figure 4-16: Security Dialog for Closing the Browser Window**



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.



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## 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**

Personal Settings				
<input type="checkbox"/> Override Facility Settings				
<b>Patient Defaults</b> <a href="#">click to update</a>				
City:		Zip Code:		
State:		Phone Area Code:		
Campaign:				
<b>Vaccination Defaults</b> <a href="#">click to update</a>				
Vaccinator:		Facility:		
Default Date:				
<b>Lot Defaults</b> <a href="#">click to add</a>				
Vaccine Name	Manufacturer / Lot Number / Facility / Pub Supp / Exp Date			
<b>VIS Publication Date Defaults</b> <a href="#">click to add</a>				
Vaccine Name	Pub Date1	Pub Date2	Pub Date3	Pub Date4
<b>Vaccine Default Volume</b> <a href="#">click to add</a>				
Vaccine Name	Default Volume			
<b>Preferences</b>				
Feature		Status:		
Automatic City / State / Zip Code Population		Enabled		<a href="#">enable/disable</a>

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

Patient Defaults Update	
City:	<input type="text"/>
State:	--select-- <input type="button" value="v"/>
Zip Code:	<input type="text"/>
Phone Area Code:	( <input type="text"/> )
Campaign:	--select-- <input type="button" value="v"/>
<input type="button" value="Cancel"/> <input type="button" value="Reset"/> <input type="button" value="Save"/>	

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

Table 5-1: Mass Immunizations Patient Defaults Field Descriptions

FIELD	DESCRIPTION
CITY	Default name of the City that will automatically populate the application windows containing this field.
STATE	Default name of the State that will automatically populate the application windows containing this field.
ZIP CODE	Default number for the Zip Code that will automatically populate the application windows containing this field.  <b>Note:</b> 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	<p>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.</p> <p>Name of the Campaign associated with the Mass Immunizations. Examples of Campaigns are:</p> <ul style="list-style-type: none"> <li>• 2008 CDC Exercise</li> <li>• Pan Flu (STC automatically provides this campaign)</li> </ul> <p><b>Note:</b> 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.</p> <p>Click the drop-down menu arrow to select the Campaign.</p> <p><b>Examples of scenarios with Personal Settings.</b></p> <p><b>Scenario 1:</b> 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.</p>



## Mass Immunizations Settings Menu

FIELD	DESCRIPTION
	<p><b>Scenario 2:</b> 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.</p> <p><b>Scenario 3:</b> 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 “Config Vaccines” returns as does the drop-down box of other available vaccines.</p>

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**

Vaccination Defaults Update	
Vaccinator:	--select-- <input type="button" value="v"/>
Facility:	--select-- <input type="button" value="v"/>
Default Date:	<input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value="Reset"/> <input type="button" value="Save"/>	

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

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

FIELD	DESCRIPTION
<b>VACCINATOR</b>	Default name of the Vaccinator that will automatically populate the application windows containing this field. <b>Note:</b> If using Mass Immunizations with Iweb Core, this default will appear in both applications.
<b>FACILITY</b>	Default name of the Vaccinator’s Facility that will automatically populate the application windows containing this field. <b>Note:</b> 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.
<b>DEFAULT DATE</b>	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.
<b>SERVICE TYPE</b>	(State Configurable Option; used by



FIELD	DESCRIPTION
	Louisiana) Default name that will appear on the Vaccination View/Add, Edit and Details windows each time the user logs on.

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 DEFAULTS

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.

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

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

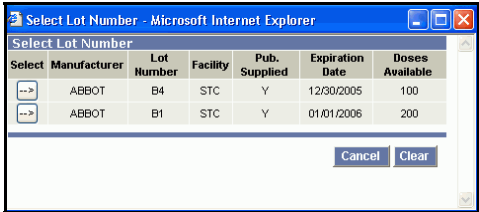
**Table 5-3: Mass Immunizations Lot Defaults Field Descriptions**

FIELD	DESCRIPTION
<b>VACCINE DESCRIPTION</b>	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.
<b>MANUFACTURER</b>	Default name of the Vaccine Manufacturer that you are setting Lot Defaults for that will automatically populate the application windows containing this field.





## Mass Immunizations Settings Menu

FIELD	DESCRIPTION
	<p>Click the “Click to Select” hyperlink to display the “Select Lot Number” window with a list of valid choices.</p>  <p><b>Note:</b> This list will change depending on the Vaccine chosen. In the window below, DTaP was the chosen Vaccine.</p> <p>While on the “Select Lot Number” window, click on one of the buttons:</p> <ul style="list-style-type: none"> <li>• <b>SELECT ARROW</b> beside the Manufacturer you desire. You will return to the “Lot Defaults Add/Update” window with your selection imbedded into the corresponding field(s).</li> <li>• <b>CANCEL</b> to return to the “Lot Defaults Add/Update” window with your data remaining in the fields.</li> <li>• <b>CLEAR</b> to return to the “Lot Defaults Add/Update” window with the data fields erased.</li> </ul>
<b>LOT NUMBER</b>	<p>Manufacturer’s Lot Number chosen when the “Select Lot Number” window appeared and a choice made.</p> <p><b>Note:</b> Only one lot is allowed per vaccine or an error message will appear.</p>
<b>EXPIRATION DATE</b>	Date the Lot will expire.
<b>LOT FACILITY</b>	Manufacturer’s Facility chosen when the “Select Lot Number” window appeared and a choice made.
<b>PUBLICLY SUPPLIED</b>	Retrieved when the “Select Lot Number” window appeared and a choice made. Indicates whether the Lot number was publicly supplied or not.

- 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.



## ADDING/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**

FIELD	DESCRIPTION
VACCINE DESCRIPTION	<p>Default name of the Vaccine that you are setting VIS Publication defaults for that will automatically populate the application windows containing this field.</p> <p>Click the drop-down menu arrow to view a list of vaccine.</p>



---

FIELD	DESCRIPTION
PUBLICATION DATE 1	Date of the Publication for each antigen of the vaccine.
PUBLICATION DATE 2 – 4	Date of the Publication for each composite shot.

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 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

The screenshot shows a window titled "Add Vaccine Dosage Default". Inside, there are two main fields: "Vaccine" which is a dropdown menu currently showing "--select--", and "Dosage Default" which is a text input field. At the bottom right of the window, there are two buttons: "Cancel" and "Save".

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

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

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

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.

Figure 5-7: Facility Settings

Facility Settings					
<b>Patient Defaults</b> <a href="#">click to update</a>					
City:		Zip Code			
State:		Phone Area Code:			
Campaign:					
<b>Vaccination Defaults</b> <a href="#">click to update</a>					
Vaccinator:		Facility:			
Default Date:					
<b>Lot Defaults</b> <a href="#">Default Lot Numbers</a>					
Vaccine Name	Manufacturer / Lot Number / Facility / Pub Supp / Exp Date				
<b>VIS Publication Date Defaults</b> <a href="#">click to add</a>					
Vaccine Name	Pub Date1	Pub Date2	Pub Date3	Pub Date4	
<b>Vaccine Default Volume</b> <a href="#">click to add</a>					
Vaccine Name	Default Volume				

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:



- Table 5-1 for Patient Defaults
- Table 5-2 for Vaccination Defaults
- Continue to Step 4 for Lot Defaults
- Table 5-4 for VIS Publication Date Defaults
- Table 5-5 for Vaccine Default Volume Defaults

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**

FIELD	DESCRIPTION
<b>IRMS</b> <b>DO NOT LIMIT</b>	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
<b>FACILITY</b> <b>DO NOT LIMIT</b>	To limit the Facility by a specific Facility, click the drop-down menu arrow to make a





## Mass Immunizations Settings Menu

FIELD	DESCRIPTION
	selection; otherwise, leave the DO NOT LIMIT radio button selected.
<b>VFC PIN</b>	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.
<b>ACTIVE LOTS</b>	<p>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,</p> <ul style="list-style-type: none"> <li>To select one lot, click the vaccine lot and click the &gt;&gt; Button to move it to the “Selected” Vaccine lots.</li> <li>To select more than one vaccine lot in sequential order, click each vaccine lot while holding the <b>SHIFT</b> key, and then click the &gt;&gt; Button.</li> <li>To select more than one vaccine lot not in sequential order, click each vaccine while holding the <b>CTRL</b> key, and then click the &gt;&gt; Button.</li> </ul> <p>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 &lt;&lt; Button.</p> <p><b>Note:</b> A maximum of five (5) default lots can be selected for one vaccine.</p> <p><b>Campaign Information</b></p> <p>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.</p> <p>If a campaign is selected:</p> <ul style="list-style-type: none"> <li>Only those vaccines types that are defined as counter measures for the campaign are displayed. (Campaigns -&gt; Search/Add -&gt; Campaign Details)</li> <li>If the Lot Defaults match the vaccine types defined for the campaign,</li> </ul>



FIELD	DESCRIPTION
	<p>display the Lot Defaults information for those vaccine types on the administration screen.</p> <p>This is how the system currently works..</p> <p>If a campaign is not selected:</p> <ul style="list-style-type: none"> <li>Only those vaccine types that are defined as Lot defaults and those vaccines defined as Mass Imms/Dispensing Shortcuts (Administration -&gt; Config Vaccines -&gt; Vaccine Configuration Details) are displayed.</li> <li>If the Lot Defaults match the vaccine types defined as a Mass Imms/Dispensing Shortcut, display the Lot Defaults information for those vaccine types on the administration screen.</li> </ul>

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.



## Mass Immunizations Settings Menu

<b>Facility Settings</b>			
<b>Patient Defaults</b> <a href="#">click to update</a>			
City:	Zip Code:		
State:	Phone Area Code:		
Campaign:			
<b>Vaccination Defaults</b> <a href="#">click to update</a>			
Vaccinator:	Facility:		
Default Date:			
<b>Lot Defaults</b> <b>Default Lot Numbers</b>			
Vaccine Name	Manufacturer / Lot Number / Facility / Pub Supp / Exp Date		
Influenza Nasal Spray	BIOPORT CORPORATION / 54321 / RICHMOND FAMILY CLINIC / Public / 12/12/2012	<a href="#">Update</a>	<a href="#">Delete</a>
Influ Inact 48+ mos pres free	NOVARTIS PHARMACEUTICAL CORP. / 1116951P / RICHMOND FAMILY CLINIC / Public / 05/31/2012	<a href="#">Update</a>	<a href="#">Delete</a>
<b>VIS Publication Date Defaults</b> <a href="#">click to add</a>			
Vaccine Name	Pub Date1	Pub Date2	Pub Date3
Pub Date4			
<b>Vaccine Default Volume</b> <a href="#">click to add</a>			
Vaccine Name	Default Volume		

- Click the **UPDATE** hyperlink for the desired lot. The “Lot Defaults Add/Update” screen appears.

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

<b>Lot Defaults Add/Update</b>	
Vaccine/Med	Influ Inact 48+ mos pres free
Selected Lot:	
Active Lots:	--select--
<a href="#">Cancel</a> <a href="#">Reset</a> <a href="#">Save</a>	

- 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.

- 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.



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## 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**

Change Password	
Current Password:	<input type="text"/>
New Password:	<input type="text"/>
New Password (again):	<input type="text"/>
<input type="button" value="Reset"/> <input type="button" value="Submit"/>	



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

Your password is within One Week of expiring, you can change it below.  
If you prefer to continue without updating your password, please click 'Skip'

Change Password	
Current Password:	<input type="text"/>
New Password:	<input type="text"/>
New Password (again):	<input type="text"/>

Reset Submit Skip

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.



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## 7 HELP MENU

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

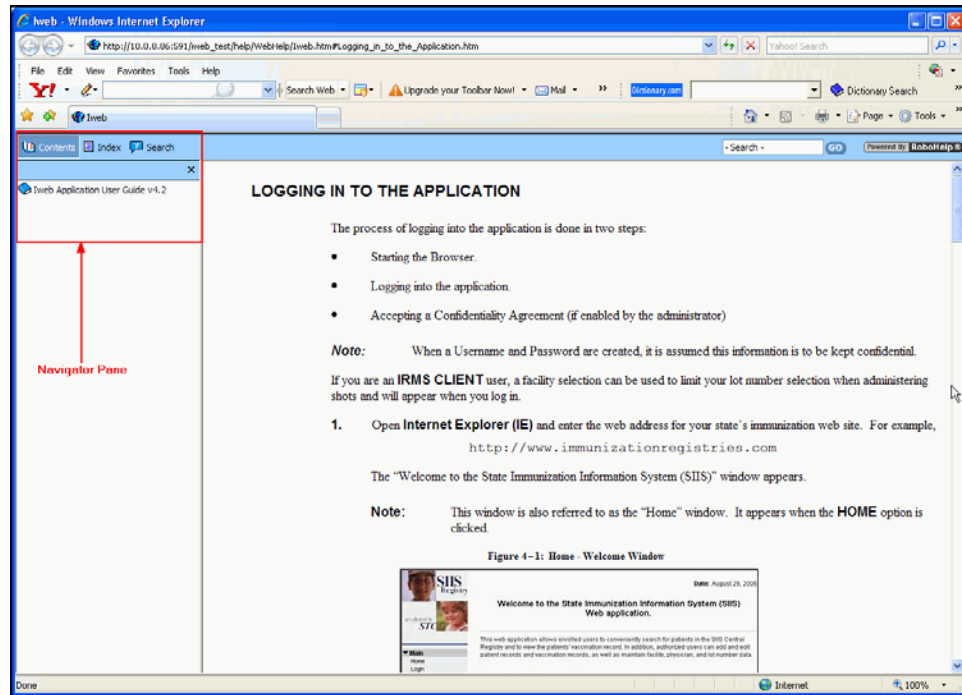
The **Online Help** menu is designed to give the user an online user guide that will explain how to use the application menus and options. It is very similar to the printed Mass Immunization Application User's Guide.

*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.



Figure 7-1: Sample of Online Help Facility



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

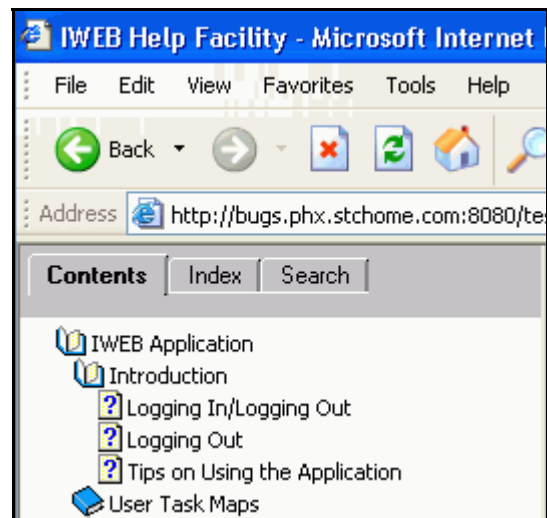
When viewing contents, there will be pages and additional books to open.





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



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

## VIEWING AN INDEX

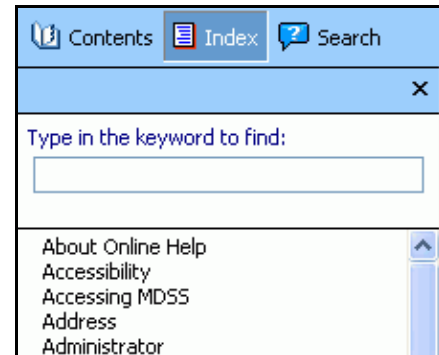
The index displays an alphabetized list where keywords can be entered. A global search is performed meaning the entire Help Facility is searched versus only the On-Line Help Facility book.

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

1. Click on the **INDEX** tab.

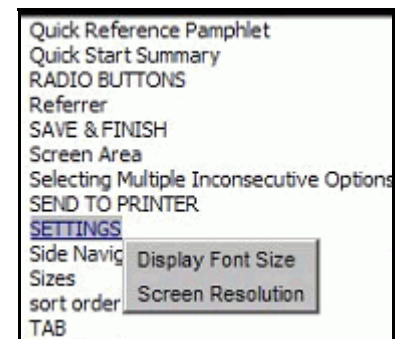


Figure 7-3: Index Tab



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.

Figure 7-4: Keyword Sample



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

## PERFORMING A SEARCH

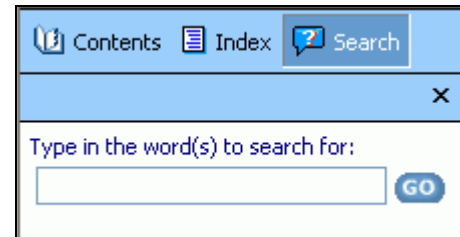
The **SEARCH** displays an open field to type and enter a keyword. A global search is performed meaning the entire Help Facility is searched versus only the On-Line Help Facility book.

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



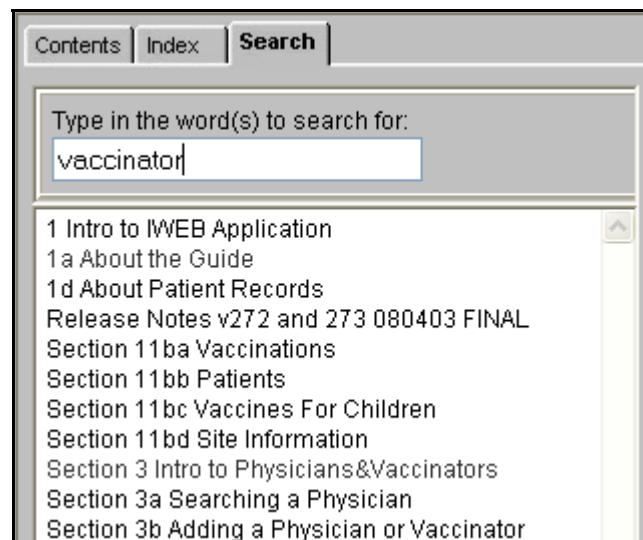
1. Click on the **SEARCH** tab.

Figure 7-5: Search Tab



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



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.



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By opening the “Navigator Pane,” all the books and topics will display. By closing the “Navigator Pane,” the content consumes the entire window.



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## 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/mediations 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

Lot Number Maintenance							
Search/Add Lot Number - Search Required Before Adding							
<input type="checkbox"/>	Vaccine/Med	--select--					
<input type="checkbox"/>	Manufacturer	--select--					
<input type="checkbox"/>	Lot Number	<input type="text"/>					
<input type="checkbox"/>	Facility:	--select--					
	Inactive Status:	All					
	Inactive Reason:	--select--					
	Sort By:	Lot Number					
<b>Search</b>							
Search Results							
Select	Facility	Manufacturer	Lot Number	Vaccine/Med	Pub Supp	Exp. Date	Inactive
<input type="checkbox"/>	CHAPIN ST. CLINIC	SANOFI PASTEUR	123458	DTaP	Y	01/01/2010	
<input type="checkbox"/>	ARAPAHOE SC	MERCK	124UH222	Hep B Ped/Adol - Preserv Free	Y	12/22/2009	
<input type="checkbox"/>	CHAPIN ST. CLINIC	MERCK	2100AE4	Varicella	Y	07/28/2011	
<input type="checkbox"/>	CHAPIN ST. CLINIC	MERCK	211355	DTaP/Hep B/IPV	Y	10/25/2009	
<input type="checkbox"/>		SANOFI PASTEUR	23455	DTaP	Y	12/25/2013	
<input type="checkbox"/>	CHAPIN ST. CLINIC	SANOFI PASTEUR	35422AA	DTaP, 5 pertussis antigens		12/25/2009	
<b>Add</b>							

**Note:** Initially the screen will display all lots for the IRMS/Facility. When a specific “Search” has been performed, the application remembers and redisplay the last “Search/Search Results” window.

- The fields and their descriptions are listed in the table:

Table 8-1: Mass Immunizations Lot Number Maintenance Field Descriptions

FIELD	DESCRIPTION
<b>VACCINE</b>	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.
<b>MANUFACTURER</b>	Click the drop-down menu arrow to view/select a valid choice for the Manufacturer name. After selecting



FIELD	DESCRIPTION
	a choice, the checkbox will automatically check.
LOT NUMBER	Type the Lot Number into the blank field. After typing the lot number, the checkbox will automatically check.
FACILITY	<p>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.</p> <p><b>Note:</b> 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.</p>
INACTIVE STATUS	<p>Click the drop-down menu arrow to view/select a valid choice for the Lot Status. Choices are:</p> <ul style="list-style-type: none"><li>• All (both active and inactive)</li><li>• Inactive (only)</li><li>• Active (the default)</li></ul>
INACTIVE REASON	<p>If the "Inactive" status is chosen, click the drop-down menu arrow to select the reason. Choices are:</p> <ul style="list-style-type: none"><li>• Cold Chain Failure</li><li>• Recall</li><li>• Other</li></ul> <p><b>Note:</b> If the reason of "other" is selected, the "Inactive Description" text box opens to type a "free-form" reason.</p>
INACTIVE DESCRIPTION (IF OTHER)	This is a "free-form" text box that is used to enter a description when the "Inactive Reason" contains "Other."
SORT BY	<p>Click the drop-down menu arrow to view/select a valid choice for the sorting. Examples of valid choices are:</p> <ul style="list-style-type: none"><li>• Expiration Date</li><li>• Facility Group, Facility</li><li>• Facility</li></ul>



FIELD	DESCRIPTION
	<ul style="list-style-type: none"> <li>Manufacturer</li> <li>Lot Number</li> </ul>

- 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/Add Lot Number - Search Required Before Adding							
<input checked="" type="checkbox"/>	Vaccine	Influenza Split					
<input type="checkbox"/>	Manufacturer	--select--					
<input type="checkbox"/>	Lot Number						
<input type="checkbox"/>	Facility:	--select--					
	Inactive	All					
	Inactive Reason	--select--					
	Sort By:	Expiration Date					
							<b>Search</b>
Search Results							
Select	Facility	Manufacturer	Lot Number	Vaccine	Pub Supp	Exp. Date	Inactive
<input type="button" value="--&gt;"/>	TEST	WYETH-AYERST	2	Influenza Split	Y	12/31/2007	
<input type="button" value="--&gt;"/>		WYETH-AYERST	1	Influenza Split	Y	12/12/2008	
							<b>Add</b>

- 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]	
<b>Manufacturer:</b>	--select--
<b>Lot Number:</b>	
<b>Vaccine</b>	DTaP
<b>Facility:</b>	--select--
<b>Expiration Date:</b>	
<b>Publicly Supplied:</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No (Local Purchase)
<b>Inactive:</b>	<input type="checkbox"/>
<div>Cancel Add</div>	

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**

FIELD	DESCRIPTION OF USE
<b>MANUFACTURER</b>	Manufacturer name of the vaccine. Click on the drop-down arrow for a list of valid choices. This is a required field.
<b>LOT NUMBER</b>	Lot number for the vaccine. Type the Lot Number. This is a required field.
<b>VACCINE</b>	<p>Name of the Vaccine. Click on the drop-down menu arrow for a list of valid choices. This is a required field.</p> <p>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.</p>
<b>FACILITY</b>	<p>Name of the facility associated with the vaccine. Click on the drop-down arrow for a list of valid choices.</p> <p>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.</p>
<b>EXPIRATION DATE</b>	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.
<b>PUBLICLY SUPPLIED</b>	Indicates whether the vaccine was publicly supplied or not. Click the radio button for yes or no.
<b>INACTIVE</b>	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.

- Point and click on one of the buttons:



- 
- **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]	
Manufacturer:	ABBOT
Lot Number Code:	61
Lot Number:	SBAB-1
Vaccine/Med:	DTaP
Facility:	
Doses Used:	0
Doses Wasted and Returned:	0
Doses Wasted and Disposed:	0
Doses Available:	250
Doses Total:	250
Expiration Date:	12/31/2011
Publicly Supplied:	Y
Inactive	
Inactive Reason:	

[Back](#)   [Edit](#)

[View Lot Log](#)

[Generate Bar Code](#)
[Add To Scan Sheet](#)

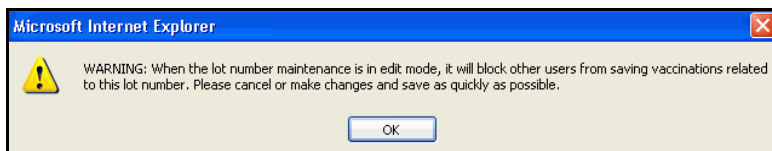
4. Click one of the available buttons:
  - **BACK** – to return to the previous window.
  - **VIEW LOT LOG** – to view the log for this lot. Refer to the section titled, “Viewing Lot Logs and Offsite Lot Logs” for instructions.
  - **VIEW OFFSITE LOG** – (not shown above) to view Offsite Logs. Refer 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

Lot Number Maintenance [Update]	
<b>Manufacturer:</b>	ABBOT-AB
<b>Lot Number:</b>	19570101
<b>Vaccine:</b>	Varicella
<b>Facility:</b>	FIRST RESPONDER TEST
Doses Used:	0
Doses Wasted and Returned:	0
Doses Wasted and Disposed:	0
Doses Available:	250
Doses Total:	250 Use the buttons below to adjust the total doses.
<b>Expiration Date:</b>	12/30/2010
Publicly Supplied:	<input checked="" type="radio"/> Yes <input type="radio"/> No (Local Purchase)
Inactive:	<input type="checkbox"/>
Inactive Reason:	--select--

To update a lot number, enter your lot number information above. Complete as many of the fields as possible. Required fields are indicated by **red** text.

If you are going to modify Doses Total, do that before modifying the other fields or your changes will be undone.

**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

Add (+) To Total Doses	
<b>Reason for Change:</b>	--select--
<b>Date of Transaction:</b>	08/30/2005 MM/DD/YYYY
<b>Number of Doses Added:</b>	
VFC PIN of other party (if applicable):	
Publicly Supplied:	Y
<div>Save</div> <div>Cancel</div>	
To change number of doses, enter your dose information above. Complete as many of the fields as possible. Required fields are indicated by <b>red</b> text.	

The “Subtract from Total Doses” window appears when you have pressed the **SUBTRACT DOSES** button.



Figure 8-8: Subtract from Mass Immunizations Total Doses

Subtract (-) From Total Doses	
<b>Reason for Change:</b>	--select--
<b>Date of Transaction:</b>	08/30/2005
<b>Number of Doses Subtracted</b>	
VFC PIN of other party (if applicable):	
Publicly Supplied:	Y
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	
<p>To change number of doses, enter your dose information above. Complete as many of the fields as possible. Required fields are indicated by <b>red</b> text.</p> <p><b>Date of Transaction Format:</b> mm/dd/yyyy</p>	

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**

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





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

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**

REASON FOR CHANGE	EFFECTS
<b>SUBTRACT FROM TOTAL DOSES</b>	
RETURNED TO VFC PROGRAM	Doses TOTAL is decremented
SENT TO ANOTHER PROVIDER	Doses TOTAL is decremented
RETURNED DIRECTLY TO VENDOR, NOT VFC SUPPLIED	Doses TOTAL is decremented
OVER ESTIMATED TOTAL DOSES	Doses TOTAL is decremented
CORRECTION OF INVALID ENTRY	Doses TOTAL is decremented
INEFFECTUAL	Doses TOTAL is decremented
SPOILED, WASTED (DROPPED, SPILLED)	*Doses WASTED is incremented
EXPIRED	*Doses WASTED is incremented
LOST DURING SHIPMENT	*Doses WASTED is incremented
DAMAGED DURING SHIPMENT	*Doses WASTED is incremented
LOST BY PROVIDER, UNACCOUNTED FOR IN PROVIDER INVENTORY	*Doses WASTED is incremented



REASON FOR CHANGE	EFFECTS
TWO DOSES GIVEN TO BE EQUIVALENT OF NORMAL DOSAGE FOR THIS AGE PERSON	Doses USED is incremented
VACCINE USED AT REMOTE CLINIC	Doses USED is incremented
ADMINISTERED TO CLIENT WHO CHOSE NOT TO BE IN REGISTRY	Doses USED is incremented 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.
<b>ADD TO TOTAL DOSES</b>	
RECEIVED FROM VFC PROGRAM	Doses TOTAL is incremented
RECEIVED FROM ANOTHER PROVIDER	Doses TOTAL is incremented
RECEIVED DIRECTLY FROM VENDOR, NOT VFC SUPPLIED	Doses TOTAL is incremented
UNDER ESTIMATED TOTAL DOSES	Doses TOTAL is incremented
CORRECTION OF INVALID ENTRY	Doses TOTAL is incremented
RECEIVED FROM CDC, NOT VFC SUPPLIED	Doses TOTAL is incremented
CORRECTION TO WASTED DOSES	Doses TOTAL is incremented
* 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.



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## 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**

Lot Number Inventory Log					
Manufacturer: ABBOT					
Lot Number: 54					
Facility: TEST					
Date	Dose Change	Other Party's VFC Pin	Publicly Supplied	Description	Insert Stamp
08/30/2005	150		Y	Received from another provider	08/30/2005 11:41:53 AM
					<a href="#">Back</a>

**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 (mmddyyyy) 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

Offsite Lot Number Log			
Manufacturer: ABBOT			
Lot Number: 54			
Facility: TEST			
Date	Dose Change	Username	Comments
Print Log		Back	Add Log Record

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]	
<b>Manufacturer:</b>	ABBOT
<b>Lot Number:</b>	12345
<b>Facility:</b>	STC
<b>Comments:</b>	<input type="text"/>
<b>Number of Doses:</b>	Check In (+): <input type="text"/> OR Check Out (-): <input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value="Reset"/> <input type="button" value="Save Changes"/>	
<b>Check In-</b> Check in this lot (unused vaccine) <b>Check Out-</b> 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.

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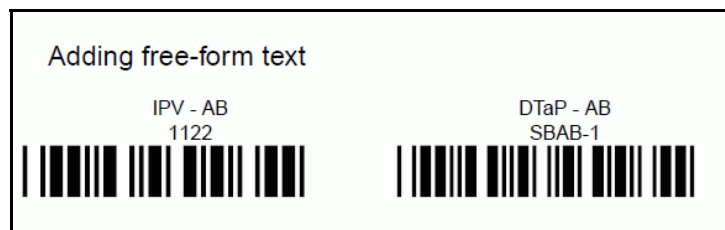
- 8-20**





- 
- 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



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**

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

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

FIELD	DESCRIPTION OF USE
<b>FIRST NAME OR INITIAL</b>	This field can be used to enter the entire first name or the initial of the first name. This is a required field.
<b>LAST NAME OR INITIAL</b>	This field can be used to enter the entire last name or the initial of the last name. This is a required field.
<b>BIRTH DATE</b>	This is the birth date of the patient. Type the date using the format mmddyyyy.
<b>CAPTURE BARCODE</b>	In order for this field to appear, the following Administration Properties must be set: <ul style="list-style-type: none"> <li>• Registry Settings</li> <li>• Patient Settings</li> <li>• First Responder / Mass Imms/Dispensing</li> </ul> Enable the following options:



FIELD	DESCRIPTION OF USE
	<ul style="list-style-type: none"><li>• Enable Barcode Tools</li><li>• Enable Patient Barcode Printing</li><li>• Patient Search Barcode Button Text</li><li>• Enable Barcode Tools</li></ul> Setup the IRMS: <ul style="list-style-type: none"><li>• Enable Barcode Tools</li></ul>

- 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.
- Type data into the “**RED** labeled” fields.
- 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**

Patient Search						
<b>Search Criteria</b>						
Patients found with: First Initial = "t" and Birthday = "06/03/2000 "						
OR						
Last Initial = "t" and Birthday = "06/03/2000 "						
<b>Search Results</b>						
Records Found = 1						
Select	First Name	Middle Name	Last Name	Birth Date	Grd First Name	Mother's Maiden
<input type="button" value="→"/>	TOMMY		TEST	06/03/2000	TINA	BAMBINA
Before adding a new patient, check to make sure the patient you want to add is not listed above.						
					<input type="button" value="Cancel"/>	<input type="button" value="Add New Patient"/>

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

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

Patient Search						
<b>Search Criteria</b>						
Patients found with: First Initial = "b" and Birthday = "06/03/2000 "						
OR						
Last Initial = "b" and Birthday = "06/03/2000 "						
<b>Search Results</b>						
Records Found = 0						
Select	First Name	Middle Name	Last Name	Birth Date	Grd First Name	Mother's Maiden
Before adding a new patient, check to make sure the patient you want to add is not listed above.						
					<input type="button" value="Cancel"/>	<input type="button" value="Add New Patient"/>

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.



**Figure 9-4: Mass Immunizations Patient Add/Vaccination Add/Contraindication**

Patient Address Information (Most recent record in system)			
<input type="checkbox"/> Check this box to copy the address information from the most recent record to the data entry box <b>ONLY</b> if it matches what is reported on paper.			
Street:	1 SOMEWHERE LANE		
City:	PHOENIX	State:	AZ
Zip Code:	85024	Phone Number:	622411502
County:	MARICOPA		
Patient Edit			
First Name or Initial:	TOMMY	SSN:	
Middle Name:		Birth Date:	06/03/2000
Last Name:	TEST	Sex:	--select--
Address			
Street:			
Zip Code:		City:	
State:	--select--	Phone Number:	622411502
Guardian Info			
Mother's Maiden Name: (Last Name Only)	BAMBINA	Guardian First Name:	TINA
Comments			
Campaign:	--select--		
Tier:	--select--		
Vaccinator:	<Scan Barcode Here	--select--	
Vaccination/Medication Add			
Default Date:	07/07/2011		
Vaccine/Medicine	Date	Manufacturer / Lot	
--select--	07/07/2011		
Contraindications Add			
<input type="checkbox"/> Print			
<input type="button" value="Cancel"/> <input type="button" value="Save"/> <input type="button" value="Save &amp; Queue"/> <input type="button" value="Capture Lot Barcode"/>			

- The fields and descriptions for adding a patient are listed in the table.

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

FIELD	DESCRIPTION OF USE
<b>PATIENT ADD</b>	
<b>FIRST NAME OR INITIAL</b>	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.





FIELD	DESCRIPTION OF USE
MIDDLE NAME	This is the patient's middle name and is an optional field.
LAST NAME OR INITIAL	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.
BIRTH DATE	This is the birth date of the patient. This field will contain the date that was used to perform the search.
GENDER	Gender of the patient. Click on the drop-down arrow for a list of valid choices.  <b>Note:</b> An Administration – Setting – Required Field is available that may force this field to have an entry; thus, may appear in <b>“RED.”</b>
SSN	Social Security Number of the patient.
MEDICARE ID	(State configurable option to display this field.) Identification number of the patient's Medicare.
MEDICAID #	(State configurable option to display this field.) Identification number of the patient's Medicaid.
ADDRESS	
STREET	<b>PO BOX</b> or <b>PHYSICAL ADDRESS</b> can be entered. They can be used separately, or together.  <b>STREET</b> – 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.  <b>Note:</b> An Administration – Setting – Required Field is available that may force this field to have an entry; thus, may appear in <b>“RED.”</b>
ZIP CODE	Zip code where the patient lives. This may automatically fill if set in the Personal Settings.  <b>Note:</b> 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.
CITY	City name where the patient lives. This may automatically fill if set in the Personal Settings.  <b>Note:</b> An Administration – Setting – Required Field is



FIELD	DESCRIPTION OF USE
	available that may force this field to have an entry; thus, may appear in "RED."
STATE	<p>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.</p> <p><b>Note:</b> An Administration – Setting – Required Field is available that may force this field to have an entry; thus, may appear in "RED."</p>
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	
COMMENTS	Any additional remarks regarding the vaccine/medication.
CAMPAIGN	<p>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.</p> <p>Examples of Campaigns are:</p> <ul style="list-style-type: none"> <li>• 2008 CDC Exercise</li> <li>• Pan Flu (STC automatically provides this campaign)</li> </ul> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>• A system administrative registry property setting exists that may require a campaign selection; thus, if required this field appears in "red."</li> <li>• A patient can be associated to multiple campaigns</li> </ul>



FIELD	DESCRIPTION OF USE
	<p>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.</p> <ul style="list-style-type: none"> <li>If a Campaign has been inactivated, it will not appear in the drop-down list.</li> </ul>
<b>CAMPAIGN FIELD1 NAME (UP TO FOUR)</b>	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.
<b>TIER</b>	<p>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.</p> <p><b>Note:</b> A system Administrative setting is available that may require this field to be selected, so it may appear in red; otherwise, it is optional.</p>
<b>VACCINATOR</b>	<p>Name of the person giving the immunization.</p> <p><b>Note:</b> If using Barcode Tools, the following Administration Property settings must be setup in order to see the scanning fields.</p> <ul style="list-style-type: none"> <li>Registry Settings – Enable Barcode Tools</li> <li>Patient Settings – Patient Search Barcode Button Text</li> <li>Mass Immunizations – Enable Barcode Tools</li> </ul> <p>Additionally, the specific IRMS must have the “Enable Barcode Tools” option checked.</p> <p>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 &lt;Scan Barcode Here&gt; will reappear.</p> <div> Vaccinator: &lt;Scan Barcode Here --select- </div>

- 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**

The screenshot shows a web application window titled "Patient Vaccination Record Report". The main content area displays patient information for "TOMMY TEST" (Patient ID: 190, Birth Date: 06/03/2000, Sex: Male, Guardian: TINA, Physician: [blank]). The record shows "Dose 1" through "Dose 4" with a status of "Next Vaccine Due: HEP-B 3 DOSE Recommended Due Date: 06/03/2000". A print dialog box is open over the right side of the window, showing a list of printers including "HP LaserJet 8100 Series PCL 5" and "Konica IP-422 PostScript". The print dialog has options for "Page Range" (All, Selection, Current Page) and "Number of copies" (1).

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

**Figure 9-6: Scan Now Prompt**

The screenshot shows a dialog box titled "Explorer User Prompt". It contains a "Script Prompt:" label and a "Scan now" button. Below the button is a text input field. The dialog has "OK" and "Cancel" buttons in the bottom right corner.

- Point the scanner to the barcode and **SCAN** the barcode label.
- Click **OK**. The barcode information is copied into the appropriate fields (Vaccine/Medicine, Manufacture, and Lot)



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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.



Figure 9-7: Vaccination/Contraindication Add

Patient Address Information (Most recent record in system)			
<input type="checkbox"/> Check this box to copy the address information from the most recent record to the data entry box <b>ONLY</b> if it matches what is reported on paper.			
Street:	1 SOMEWHERE LANE		
City:	PHOENIX	State:	AZ
Zip Code:	85024	Phone Number:	622411502
County:			
Patient Edit			
First Name or Initial:	TOMMY	SSN:	
Middle Name:		Birth Date:	06/03/2000
Last Name:	TEST	Sex:	--select--
Address			
Street:			
Zip Code:		City:	
State:	--select--	Phone Number:	(602)241-1502
Guardian Info			
Mother's Maiden Name:	BAMBINA	Guardian First Name:	TINA
(Last Name Only)			
Comments			
Campaign:	--select--		
Tier:	--select--		
Vaccinator:	<Scan Barcode Here	--select--	
Vaccination/Medication Add			
Default Date:			
07/07/2011			
Vaccine/Medicine	Date	Manufacturer / Lot	
--select--	07/07/2011	/	
Contraindications Add			
Vaccine/Medicine	Contraindication		
--select--	<input type="button" value="Click to select"/>		
<input checked="" type="checkbox"/> Print			
<input type="button" value="Cancel"/> <input type="button" value="Save"/> <input type="button" value="Save &amp; Queue"/>		<input type="button" value="Capture Lot Barcode"/>	

**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.

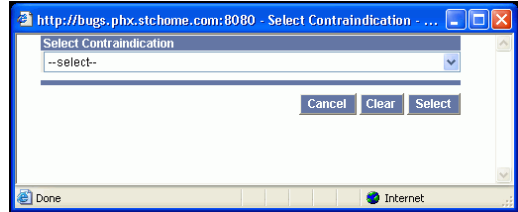
1. The fields and their descriptions are listed in the table:



**Table 9-3: Mass Immunizations Vaccination/Contraindication Add  
Field Descriptions**

FIELD	DESCRIPTION OF USE
<b>PREVIOUS VACCINATION HISTORY</b>	
<b>VACCINE/MEDICINE</b>	Name of the vaccine/medicine provided followed by the provision date.
<b>VACCINATION ADD</b>	
<b>DEFAULT DATE</b>	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 <b>DATE</b> field to the right of the Vaccine name.
<b>VACCINE</b>	<p>Name of the Vaccine for which you are adding a vaccination. Click the checkbox to insert a checkmark.</p> <p>If you do not see the desired vaccine in the list, click the drop-down menu arrow to view/select one.</p>
<b>DATE</b>	Date the vaccine was given to the patient. This field is automatically populated from the “Default Date” field.
<b>MANUFACTURER/LOT</b>	<p>Name of available manufacturer/lot numbers for the vaccine.</p> <p>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.</p> <p>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.</p> <p><b>Note:</b> Checking the checkbox will NOT automatically select the radio button.</p>



FIELD	DESCRIPTION OF USE
<b>DOSE SIZE</b>	<p>This field will appear when the Administration Property – Mass Immunizations - Display Dose Size (Size/Kits) has been checked/enabled.</p> <p>This represents the dose size of the vaccine provided. For example:</p> <ul style="list-style-type: none"> <li>• Double</li> <li>• Full</li> <li>• Half</li> <li>• Triple</li> </ul>
<b>CONTRAINDICATIONS ADD</b>	
<b>VACCINE</b>	Name of the Vaccine for which you are adding a contraindication. Click the checkbox to insert a checkmark.
<b>CONTRAINDICATION</b>	<p>Type of contraindication for the Vaccine. Click the “Click to Select” hyperlink to the far right of the Vaccine. The “Select Contraindication” window appears.</p>  <p>Click the drop-down menu arrow to view/select a valid contraindication and then click one of the available buttons:</p> <ul style="list-style-type: none"> <li>• <b>CANCEL</b> – to abort making a selection and return to the previous window.</li> <li>• <b>CLEAR</b> – to erase a selection and return to the previous window.</li> <li>• <b>SELECT</b> – to select the contraindication and copy it to the previous window. The Vaccine name will automatically get checked.</li> </ul>

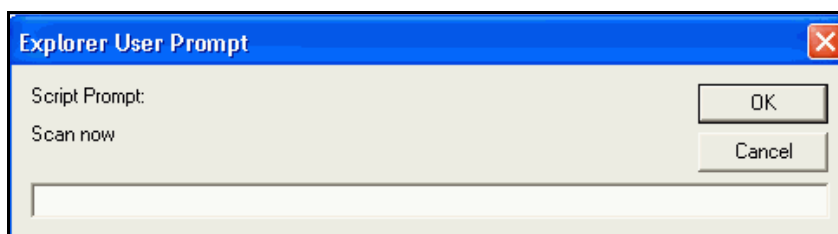
2. Make your selections by clicking/typing the data.





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



- 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.



Figure 9-9: Mass Immunizations Patient Edit

Patient Address Information (Most recent record in system)			
<input type="checkbox"/> Check this box to copy the address information from the most recent record to the data entry box <b>ONLY</b> if it matches what is reported on paper.			
Street:	1 SOMEWHERE LANE		
City:	PHOENIX	State:	AZ
Zip Code:	85024	Phone Number:	622411502
County:			
Patient Edit			
First Name or Initial:	TOMMY	SSN:	
Middle Name:		Birth Date:	06/03/2000
Last Name:	TEST	Sex:	--select--
Address			
Street:			
Zip Code:		City:	
State:	--select--	Phone Number:	(602)241-1502
Guardian Info			
Mother's Maiden Name:	BAMBINA	Guardian First Name:	TINA
(Last Name Only)			
Comments			
Campaign:	--select--		
Tier:	--select--		
Vaccinator:	<Scan Barcode Here	--select--	
Vaccination/Medication Add			
Default Date:			
07/07/2011			
Vaccine/Medicine	Date	Manufacturer / Lot	
--select--	07/07/2011	/	
Contraindications Add			
Vaccine/Medicine	Contraindication		
--select--	<input type="button" value="Click to select"/>		
<input checked="" type="checkbox"/> Print			
<input type="button" value="Cancel"/> <input type="button" value="Save"/> <input type="button" value="Save &amp; Queue"/>		<input type="button" value="Capture Lot Barcode"/>	

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				
Summary (Does not include all vaccine types)				
IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID				
Facility: VALIDATING FACILITY				
Date: September 17, 2010				
Patient ID: 129	Phone:			
Name: [REDACTED]	Street:			
Birth Date: 12/20/1959	City:			
Gender: FEMALE	State:			
Guardian:	Zip Code:			
Physician:	Country:			
Medicaid No:	WIC ID:			
<b>Vaccine Family</b>	<b>Dose 1</b>	<b>Dose 2</b>	<b>Dose 3</b>	<b>Dose 4</b>
DTaP/DT/Td/Tdap	09/17/2010 50 years			
Next Vaccine Due: POLIO Recommended Due Date: 02/20/1960				
If the above information contains errors or omissions, please contact your medical provider at the location indicated below:				
This report was generated on September 17, 2010 by:				
VALIDATING FACILITY				
This report provided by the CHILD Profile Immunization Registry System.				
Signature of physician or authorized representative of health agency:				

## 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**

Administration Waitlist						
Total Patients in Queue: 1				Total Patients Deferred: 0		
Deferred Patients	First Name	Middle Name	Last Name	Birth Date	Time Added/Deferred	
Waitlist	First Name	Middle Name	Last Name	Birth Date	Time Added	
	BELINDA	JEAN	BAKER	12/20/1959	11:38 AM	<div>Defer</div> <div>Remove</div>

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

**Table 9-4: Administration Waitlist Field Descriptions**

FIELD	DESCRIPTION
<b>TOTAL PATIENTS IN QUEUE</b>	Total number of patients queued.
<b>TOTAL PATIENTS DEFERRED</b>	Total number of patients deferred.
<b>DEFERRED PATIENTS</b>	Contains the SELECT ARROW to allow you to select the “deferred” patient.
<b>FIRST NAME</b>	Patient’s first name.
<b>MIDDLE NAME</b>	Patient’s middle name.
<b>LAST NAME</b>	Patient’s last name.
<b>BIRTH DATE</b>	Patient’s data of birth.



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FIELD	DESCRIPTION
<b>TIME ADDED/DEFERRED</b>	Time the patient was added to the Waitlist Queue and/or the time added to the Waitlist – Deferred Queue.
<b>WAITLIST PATIENTS</b>	Contains the <b>SELECT ARROW</b> to allow you to select the patient from the “Waitlist.”

**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.



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## 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.

**Figure 10-1: Reports Menu**

Reports
Patient Record
Daily Patient Immunization List
Patient Detail

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.



**Figure 10-2: Mass Immunizations – Print Patient Record**

Print Patient Record

Patient Information To Include

☒ Do Not Include Confidential Information  
☐ Include Confidential Information

Vaccination Information to Include

☒ Do Not Include Confidential Vaccines  
☐ Include Confidential Vaccines

Vaccination Record Choices

☒ Immunization Record (summary)  
☐ All Recorded Vaccinations  
☐ Forecast

☐ Printable Version (enable table borders)

Create Report

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

**Table 10-1: Print Patient Record Field Descriptions**

FIELD	DESCRIPTION
<b>PATIENT INFORMATION TO INCLUDE</b>	<p>Click on either radio button to:</p> <ul style="list-style-type: none"> <li>Do Not Include Confidential Information – (SSN, Race, Ethnicity, Medicaid Number, Birth File Number, Address, Phone, District, and Country/Parish). This is the default setting.</li> <li>Include Confidential Information</li> </ul>
<b>VACCINATION INFORMATION TO INCLUDE</b>	<p>(State-configurable option via Administration – Properties – Vaccination Settings – Enable Enter Confidential Vaccines; thus will display if configured).</p> <p>Click on either radio button to:</p> <ul style="list-style-type: none"> <li>Do Not Include Confidential Information – (Excludes Confidential Vaccines (adolescents receiving HepB and HPV), click the radio button.) This is the default setting.</li> <li>Include Confidential Information</li> </ul>





FIELD	DESCRIPTION
	<b>Note:</b> 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.
<b>VACCINATION RECORD CHOICES</b>	Click on the radio button to display and print one of the respective reports. The reports are: <ul style="list-style-type: none"><li>• All Recorded Vaccinations – Reveals a breakdown per vaccine name.</li><li>• 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.”</li><li>• Forecast – Reveals the Forecast or dates that were/are scheduled for each Vaccine.</li></ul>
<b>PRINTABLE BORDERS (ENABLE TABLE BORDERS)</b>	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**

**Patient Vaccination Record**

All Recorded Vaccinations

**IRMS:** 1000 - CLIENT\_SERVER\_INTERNAL\_IRMS\_ID  
**Facility:**  
**Date:** September 30, 2009

<b>Patient ID:</b> 33329	<b>Phone:</b>
<b>Name:</b> JOHN DOE	<b>Street:</b>
<b>Birth Date:</b> 07/01/1995	<b>City:</b>
<b>Gender:</b>	<b>State:</b>
<b>Guardian:</b>	<b>Zip Code:</b>
<b>Physician:</b>	<b>Country:</b>
<b>Medicaid No:</b>	<b>WIC ID:</b>

Vaccine Name	Dose 1	Dose 2	Dose 3	Dose 4
Influ split 18+ yrs pres free	09/30/2009			

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

This is a valid immunization record from IRIS.

Signature of physician or authorized representative of health agency:

## 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.

**Figure 10-4: Immunization Record Summary**

Patient Vaccination Record				
Summary (Does not include all vaccine types)				
IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID				
Facility:				
Date: September 30, 2009				
Patient ID: 33329		Phone:		
Name: JOHN DOE		Street:		
Birth Date: 07/01/1995		City:		
Gender:		State:		
Guardian:		Zip Code:		
Physician:		Country:		
Medicaid No:		WIC ID:		
Vaccine Family	Dose 1	Dose 2	Dose 3	Dose 4
Influenza	09/30/2009			
Next Vaccine Due: HEP-B 3 DOSE** Recommended Due Date: 07/01/1995				
This is a valid immunization record from IRIS.				
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**

Patient Vaccination Record			
Forecast			
IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID			
Facility:			
Date: September 30, 2009			
Patient ID: 33329	Phone:		
Name: JOHN DOE	Street:		
Birth Date: 07/01/1995	City:		
Gender:	State:		
Guardian:	Zip Code:		
Physician:	Country:		
Medicaid No:	WIC ID:		
Vaccine Family	Dose	Scheduled Date	Minimum Valid Date
HEP-B 3 DOSE**	1	07/01/1995	07/01/1995
DTaP/DT/Td/Tdap*	1	09/01/1995	08/12/1995
POLIO	1	09/01/1995	08/12/1995
FLU	1	01/01/1996	01/01/1996
HEP-A	1	07/01/1996	07/01/1996
MMR	1	07/01/1996	07/01/1996
VARICELLA	1	07/01/1996	07/01/1996
HEP-B 2 DOSE**	1	07/01/2006	07/01/2006
MENINGOCOCCAL	1	07/01/2006	07/01/1997
<p>* 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.</p> <p>** If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.</p>			
<div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>Signature of physician or authorized representative of health agency:</p>			



## 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.

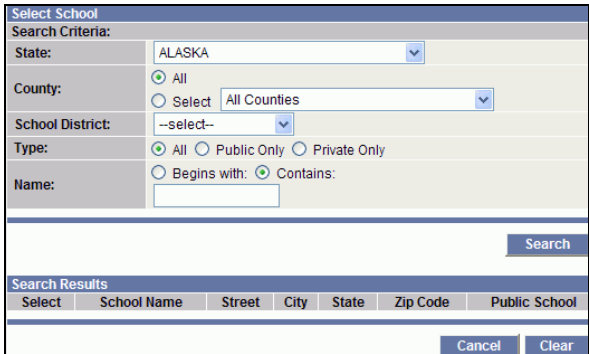
**Figure 10-6: Mass Immunizations Daily Patient Immunization List Parameters**

Daily Patient Immunization List	
<b>Limit Report By</b>	
<b>Shots Given on this Date:</b>	<input type="text"/>
<input checked="" type="checkbox"/> IRMS	CLIENT_SERVER_INTERNAL_IRMS_ID (1000) <input type="button" value="v"/>
<input type="radio"/> Facility	--select-- <input type="button" value="v"/>
<input type="radio"/> Facility Group	--select-- <input type="button" value="v"/>
<input checked="" type="radio"/> Do Not Limit	
<input type="checkbox"/> VFC PIN	--select-- <input type="button" value="v"/>
<input type="radio"/> School	<input type="text"/> <a href="#">Click to select</a>
<input checked="" type="radio"/> Do Not Limit	
<input type="checkbox"/> Vaccinator	--select-- <input type="button" value="v"/>
<input type="checkbox"/> Hide Dose Number	(Hint: Utilize this checkbox if report performance is slow.)
<div>Back Reset Create Report</div>	

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



**Table 10-2: Mass Immunizations Daily Patient Immunization List  
Parameter Descriptions**

FIELD	DESCRIPTION OF USE
<b>SHOTS GIVEN ON THIS DATE</b>	Type the date using the format mmddyyyy.
<b>IRMS</b>	To limit the report by a specific IRMS, click the drop-down menu arrow to view/select a valid choice.
<b>FACILITY FACILITY GROUP DO NOT LIMIT</b>	To limit the report by a specific <b>FACILITY</b> or <b>FACILITY GROUP</b> , click the drop-down menu arrow to view/select a valid choice; otherwise, leave the <b>DO NOT LIMIT</b> radio button selected. Upon selecting a Facility/Facility Group, the radio button will also select.
<b>VFC PIN</b>	Vaccines For Children (VFC) Personal Identification Number (PIN).
<b>SCHOOL DO NOT LIMIT</b>	<p>To limit the report by a specific <b>SCHOOL</b>, click on the “Click to Select” hyperlink. The “Select School” window appears.</p>  <ul style="list-style-type: none"> <li>Click the drop-down menu arrow to view/select a <b>STATE</b>. This prepares the <b>COUNTY</b> field.</li> <li>Click the drop-down menu arrow to view/select a <b>COUNTY</b> or leave the <b>ALL</b> radio button selected.</li> <li>Click the drop-down menu arrow to view/select a <b>SCHOOL DISTRICT</b>.</li> <li>Click one of the radio buttons for the school <b>TYPE</b> (All, Public Only, or Private Only)</li> <li>In the <b>NAME</b> field, type a portion of the</li> </ul>



FIELD	DESCRIPTION OF USE
	<p>school name and then click on the appropriate radio button (Begins with or Contains).</p> <ul style="list-style-type: none"><li>Click the <b>SEARCH</b> (or <b>ENTER KEY</b>) button. If any matches are found, they will appear in the "Search Results" section of the window.</li><li>Click one of the available buttons: <b>SELECT ARROW</b> to select a match; <b>CANCEL</b> to not select a school and return to the previous window; <b>CLEAR</b> to erase any newly selected/entered text and remain on the same window.</li></ul>
<b>VACCINATOR</b>	To limit the report by a specific VACCINATOR, click the drop-down menu arrow to view/select a valid choice.
<b>HIDE DOSE NUMBER</b>	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.



**Figure 10-7: Mass Immunizations Daily Patient Immunization List Report Sample**

Daily Patient Immunization List						
Report Criteria				Report Date: June 23, 2008		
IRMS: 1000 - CLIENT_SERVER_INTERNAL_IRMS_ID						
Facility: All						
VFC PIN: 123456						
Shots Given on this Date: 06/03/2008						
Vaccinator: All						
School: All						
Hide Dose Number: No						
Patient Name	Birth Date	Vaccine	Dose	Facility	Vaccinator	School
Total Number of Vaccines: 0						
Total Number of Patients: 0						

## 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**

Patient Detail Report	
<b>Run By</b>	
<input checked="" type="radio"/> By Ownership	
<input type="radio"/> By Service	
<b>Limit Report By</b>	
<input type="checkbox"/> Vaccination Date Range	From: <input type="text"/> To: <input type="text"/>
<input type="checkbox"/> Birth Date Range	From: <input type="text"/> To: <input type="text"/>
<input checked="" type="checkbox"/> IRMS	CLIENT_SERVER_INTERNAL_IRMS_ID (1000) <input type="button" value="v"/>
<input type="radio"/> Facility	--select-- <input type="button" value="v"/>
<input type="radio"/> Facility Group	--select-- <input type="button" value="v"/>
<input checked="" type="radio"/> Do Not Limit	
<input type="checkbox"/> VFC PIN	--select-- <input type="button" value="v"/>
<input type="checkbox"/> Campaign	--select-- <input type="button" value="v"/>
<input type="checkbox"/> Tier	--select-- <input type="button" value="v"/>
<input type="checkbox"/> State	--select-- <input type="button" value="v"/>
<input type="checkbox"/> County/Parish	--select-- <input type="button" value="v"/>
<input type="checkbox"/> Zip Code	<input type="text"/>
<input type="checkbox"/> Primary Care Physician	Select from the list below: --select-- <input type="button" value="v"/>
<input type="checkbox"/> Program	--select-- <input type="button" value="v"/>
<input type="checkbox"/> Health Plan	--select-- <input type="button" value="v"/>
<input type="checkbox"/> Race	--select-- White Black or African American <input type="button" value="v"/>
<input type="checkbox"/> VFC Code	--select-- <input type="button" value="v"/>
<input checked="" type="checkbox"/> Inactive Status	Active patients only <input type="button" value="v"/>
<input type="checkbox"/> Vaccine	--select-- <input type="button" value="v"/>
<input type="checkbox"/> Lot Number	Select from the list below: --select-- <input type="button" value="v"/>
<input type="checkbox"/> District/Region	<input type="text"/>
<input type="radio"/> School	<input type="text"/> <a href="#">Click to select</a>
<input checked="" type="radio"/> Do Not Limit	
<input type="checkbox"/> Only Show Patient Info	
<input checked="" type="checkbox"/> Sort By	<input checked="" type="radio"/> Last Name <input type="radio"/> Vaccination Date
<div>Back Reset Create Report</div>	

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



**Table 10-3: Mass Immunizations Patient Detail Report Parameter Descriptions**

FIELD	DESCRIPTION OF USE
<b>RUN BY</b>	There are two options to run this report: Ownership or Service. Click the radio button for the desired choice.
<b>VACCINATION DATE RANGE</b>	To limit the report by a specific date range, type the FROM and TO dates in the provided fields.
<b>BIRTH DATE RANGE</b>	To limit the report by a specific date range, type the FROM and TO dates in the provided fields.
<b>IRMS</b>	To limit the report by a specific IRMS, click the drop-down menu arrow to view/select a valid choice.
<b>FACILITY FACILITY GROUP DO NO LIMIT</b>	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.
<b>VFC PIN</b>	Vaccines For Children (VFC) Personal Identification Number (PIN).
<b>CAMPAIGN</b>	To limit the report for a specific CAMPAIGN, click the drop-down menu arrow to view/select a valid choice.
<b>TIER</b>	To limit the report for a specific TIER associated with a CAMPAIGN, click the drop-down menu arrow to view/select a valid choice.
<b>STATE</b>	To limit the report for a specific STATE, click the drop-down menu arrow to view/select a valid choice.  <b>Note:</b> State must be selected before County/Parish can be selected.
<b>COUNTY/PARISH</b>	To limit the report for a specific COUNTY/PARISH, click the drop-down menu arrow to view/select a valid choice.
<b>ZIP CODE</b>	To limit the report for a specific ZIP CODE, type the zip code number in the field (5 or 9-digits)
<b>PRIMARY CARE PHYSICIAN</b>	To limit the report for a specific PRIMARY CARE PHYSICIAN, click the drop-down menu



## Mass Immunizations Reports Menu

FIELD	DESCRIPTION OF USE
	arrow to view/select a valid choice.
<b>PROGRAM</b>	To limit the report for a specific PROGRAM, click the drop-down menu arrow to view/select a valid choice.
<b>HEALTH PLAN</b>	To limit the report for a specific HEALTH PLAN, click the drop-down menu arrow to view/select a valid choice.
<b>RACE</b>	To limit the report by a specific RACE, click the up/down menu arrows to view/select from the list.
<b>VFC CODE</b>	To limit the report by a specific VFC CODE, click the drop-down menu arrow to view/select a valid choice.
<b>INACTIVE STATUS</b>	<p>To limit the report by a specific PATIENT STATUS, click the drop-down menu arrow to view/select a valid choice. Examples are:</p> <ul style="list-style-type: none"><li>• Active patients only</li><li>• Active and Inactive patients</li><li>• Inactive patients only</li></ul>
<b>VACCINE</b>	<p>To limit the report by a specific vaccine and/or medicine, click the drop-down menu arrow to view/select a valid choice.</p> <p><b>Note:</b> There is an administrative property setting for Mass Immunizations to specify Medicines, Vaccines, or Vaccines and Medicines in the drop-down list.</p>
<b>LOT NUMBER</b>	To limit the report by a specific LOT NUMBER, click the drop-down menu arrow to view/select a valid choice.
<b>DISTRICT/REGION</b>	To limit the report by a specific DISTRICT or REGION, type the number into the provided field.
<b>SCHOOL DO NOT LIMIT</b>	To limit the report by a specific <b>SCHOOL</b> , click on the “Click to Select” hyperlink. The “Select School” window appears.



FIELD	DESCRIPTION OF USE														
	<div><div><div><div><div>Select School</div><div>Search Criteria:</div><div>State:<div>ALASKA</div></div><div>County:<div><div><div>All</div><div>Select</div></div><div>All Counties</div></div></div><div>School District:<div>--select--</div></div><div>Type:<div><div>All</div><div>Public Only</div><div>Private Only</div></div></div><div>Name:<div><div>Begins with:</div><div>Contains:</div><div></div></div></div><div><div>Search</div></div></div><div><div>Search Results</div><table><tr><th>Select</th><th>School Name</th><th>Street</th><th>City</th><th>State</th><th>Zip Code</th><th>Public School</th></tr><tr><td colspan="7"></td></tr></table><div><div>Cancel</div><div>Clear</div></div></div></div><div><ul style="list-style-type: none"><li>Click the drop-down menu arrow to view/select a <b>STATE</b>. This prepares the <b>COUNTY</b> field.</li><li>Click the drop-down menu arrow to view/select a <b>COUNTY</b> or leave the <b>ALL</b> radio button selected.</li><li>Click the drop-down menu arrow to view/select a <b>SCHOOL DISTRICT</b>.</li><li>Click one of the radio buttons for the school <b>TYPE</b> (All, Public Only, or Private Only)</li><li>In the <b>NAME</b> field, type a portion of the school name and then click on the appropriate radio button (Begins with or Contains).</li><li>Click the <b>SEARCH</b> (or <b>ENTER KEY</b>) button. If any matches are found, they will appear in the “Search Results” section of the window.</li><li>Click one of the available buttons: <b>SELECT ARROW</b> to select a match; <b>CANCEL</b> to not select a school and return to the previous window; <b>CLEAR</b> to erase any newly selected/entered text and remain on the same window.</li></ul></div></div></div>	Select	School Name	Street	City	State	Zip Code	Public School							
Select	School Name	Street	City	State	Zip Code	Public School									
ONLY SHOW PATIENT INFO	To display only the patient information, click the checkbox. Click it again to remove the checkmark.														
SORT BY	<p>To indicate how the data should appear on the report. Examples are:</p> <ul style="list-style-type: none"><li>Last Name</li></ul>														



## Mass Immunizations Reports Menu

FIELD	DESCRIPTION OF USE
	<ul style="list-style-type: none"> <li>Vaccination Date</li> </ul>

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

Patient Detail Report							
Report Criteria				Report Date: June 23, 2008			
Run By: By Ownership							
IRMS: 1000 -		Facility: All		Vaccine: All			
CLIENT_SERVER_INTERNAL_IRMS_ID		Vaccination Date Range:		Birth Date Range: All			
Patients Status: Active patients only		01/01/1990 to 06/23/2008					
VFC Code: All		VFC PIN: 123456					
Physician: All		Program: All					
Health Plan: All		Zip Code: All					
Race: All		State: All					
Lot Number: All		County/Parish: All					
District/Region: All		School: All					
High Risk Category: All		Sort Criteria: Last Name					
Campaign: PAN FLU		Tier:					
Total Patients Selected: 1				Deleted vaccinations are shown with a line through them.			
Patient ID	First Name	Middle Name	Last Name	Birthday	Guardian F.N.	Phone Number	Facility
5708	JOHN	ALLEN	DOE	06/03/2000	MARY	(602)241-1556	
Vaccine Name	Vaccination Date	Manufacturer Code	Lot Number	Historical	Vaccinator	Facility	
DTaP	06/03/2001			Y			



## 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**

Lot Number Summary		
<input type="checkbox"/>	Include Inactive Lots	
<input type="checkbox"/>	Include Expired Lots	
<input type="checkbox"/>	Include Order/Transfer Quantities	
<b>Limit Report By</b>		
<input type="checkbox"/>	Report Date	From: <input type="text"/> To: <input type="text"/>
<input type="checkbox"/>	Expiration Date	From: <input type="text"/> To: <input type="text"/>
<input checked="" type="checkbox"/>	IRMS	1000-CLIENT_SERVER_INTERNAL_IRMS_ID <input type="button" value="v"/>
<input type="radio"/>	Facility	--select-- <input type="button" value="v"/>
<input type="radio"/>	Facility Group	--select-- <input type="button" value="v"/>
<input checked="" type="radio"/>	Do Not Limit	
<input type="checkbox"/>	VFC PIN	--select-- <input type="button" value="v"/>
<input type="checkbox"/>	Manufacturer	--select-- <input type="button" value="v"/>
<input type="checkbox"/>	Vaccine Name	--select-- <input type="button" value="v"/>
<input type="checkbox"/>	Publicly Supplied Only	
<b>Display By</b>		
<input checked="" type="checkbox"/>	Subtotal by Vaccine	
<input type="checkbox"/>	Aggregate by IRMS/Facility	
<input type="checkbox"/>	Separate Reports by Calendar Month	
<b>Order By</b>		
<input type="radio"/>	Manufacturer	
<input type="radio"/>	Expiration Date	
<input type="radio"/>	Lot Number	
		<input type="button" value="Back"/> <input type="button" value="Reset"/> <input type="button" value="Create Report"/>



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

**Table 10-4: Lot Number Summary Report Parameter Descriptions**

FIELD	DESCRIPTION
INCLUDE INACTIVE LOT NUMBERS	Point and click the checkbox if you want to include the “Inactive Lot Numbers” on the report.
INCLUDE EXPIRED LOTS	Point and click the checkbox if you want to include the “Expired Lots” on the report.
INCLUDE ORDERS/TRANSFERS QUANTITIES	Point and click the checkbox if you want to include the Orders/Transfers Quantities on the report.
LIMIT REPORT BY	
REPORT DATE	To limit the report by a specific date range, type both the From and To dates into their respective fields.  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.
EXPIRATION DATE	To limit the report by a specific expiration date range, type both the From and To dates into their respective fields.
IRMS	To limit the report by a specific IRMS, click the drop-down menu arrow to view/select a valid choice.
FACILITY, FACILITY GROUP, DO NOT LIMIT	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.
VFC PIN	To limit the report by a specific VFC PIN, click the drop-down menu arrow to view/select a valid choice.
MANUFACTURER	To limit the report by a specific manufacturer, click the drop-down menu arrow to view/select a valid choice.
VACCINE NAME	To limit the report by a specific vaccine and/or medicine, click the drop-down menu arrow to view/select a valid choice.  <b>Note:</b> There is an administrative property



FIELD	DESCRIPTION
	setting for Mass Immunizations to specify Medicines, Vaccines, or Vaccines and Medicines in the drop-down list.
<b>PUBLICLY SUPPLIED ONLY</b>	To limit the report by Publicly Supplied Vaccines, click the checkbox to select/deselect it
<b>DISPLAY BY</b>	
<b>SUBTOTAL BY VACCINE</b>	This option is used to display subtotals by vaccine name.
<b>AGGREGATE BY IRMS/FACILITY</b>	This option is used to display aggregate (combined) totals per IRMS or Facility.
<b>SEPARATE REPORTS BY CALENDAR MONTH</b>	This option is used to separate the reports by calendar month.
<b>ORDER BY</b>	
<b>MANUFACTURER</b>	This option groups the report by manufacturer name.
<b>EXPIRATION DATE</b>	This option groups the report by expiration date.
<b>LOT NUMBER</b>	This option groups the report by lot number.

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 10-11: Lot Number Summary Report

Manufacturer

Lot Number Summary

Report Criteria:

Report Date: December 30, 2009

IRMS: 1000 - CLIENT\_SERVER\_INTERNAL\_IRMS\_ID

Facility: All

VFC PIN: All

Vaccine Name: All

Manufacturer: All

Expiration Date Range: All

Report Date Range: 01/01/2009 to 12/30/2009

Report Completed By: SHERRI K B SHERRI\_RC

Include Inactive Lots: Yes

Include Expired Lots: Yes

Include Order/Transfer Quantities: Yes

Sort Order:

Publicly Supplied Only: No

Note: 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.

Lot Number	Vaccine Name	Manufacturer	Expires	Publicly Supplied	Ending Doses	Starting Doses	Doses Adjusted	Doses Used	Doses Wasted Returned	Doses Wasted Expired	Doses Wasted Disposed	Doses Received	Doses Transferred In	Doses Transferred Out	Doses Viable Returns	Sub Total
Novel H1N1,Nasal	SB-2	ABB	06/03/2010	Y	250	0	250	0	0	0	0	0	250	0	0	250
Novel H1N1,Nasal	SB-3	ADA	09/03/2010	Y	150	0	150	0	0	0	0	150	0	0	0	150
Total for Novel H1N1,Nasal					400	0	400	0	0	0	0	150	250	0	0	400



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## 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.

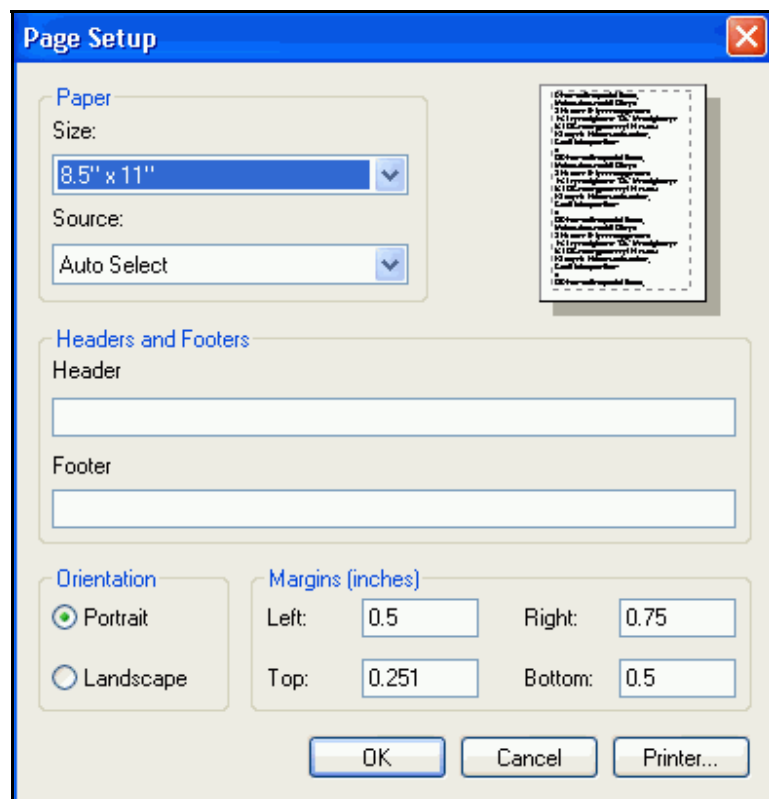


## MASS IMMUNIZATIONS REMINDER RECALL PRINTER SETUP

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.



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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.



Figure 11-2: Reminder Recall Parameters

Reminder/Recall	
<input type="checkbox"/> Do Not Increment Recall Count (Run Recall)	
<input type="checkbox"/> Preview and Select Patients	
<b>Reminder/Recall Date Range:</b>	<b>From:</b> 01/01/1990 <b>To:</b> 08/28/2009
<b>Maximum Recall Tries:</b>	5
<b>Valid Addresses:</b>	<input type="radio"/> Valid Addresses Only <input type="radio"/> Invalid Addresses Only <input checked="" type="radio"/> All Patients
<b>Limit Reminder/Recall Group By:</b>	
<input checked="" type="radio"/> IRMS	CLIENT_SERVER_INTERNAL_IRMS_ID (1000)
<input type="radio"/> Do Not Limit	
<input type="radio"/> Facility	--select--
<input checked="" type="radio"/> Do Not Limit	
<input type="checkbox"/> Campaign	--select--
<input type="checkbox"/> Tier	--select--
<b>Vaccine Families:</b>	<b>and Optional Needed Dose Number:</b>
<input checked="" type="checkbox"/> DTaP/DT/Td/Tdap*	
<input checked="" type="checkbox"/> HIB	
<input checked="" type="checkbox"/> POLIO	
<input checked="" type="checkbox"/> HEP-B 3 DOSE**	
<input checked="" type="checkbox"/> MMR	
<input checked="" type="checkbox"/> VARICELLA	
<input checked="" type="checkbox"/> MENINGOCOCCAL	
<input checked="" type="checkbox"/> HEP-A	
<input checked="" type="checkbox"/> FLU	
<input checked="" type="checkbox"/> PNEUMO (PCV)	
<input checked="" type="checkbox"/> HEP-B 2 DOSE**	
<input type="checkbox"/> ANTHRAX	
<input type="checkbox"/> SMALLPOX	
<input type="checkbox"/> SHOT/READING	
<input checked="" type="checkbox"/> PNEUMO (PPSV)	
<input checked="" type="checkbox"/> ROTAVIRUS	
<input checked="" type="checkbox"/> HPV	
<input checked="" type="checkbox"/> HERPES ZOSTER	
<small>* 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.</small> <small>** If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.</small>	
<b>Name of Person Running Reminder/Recall:</b>	
<input type="button" value="Clear"/> <input type="button" value="Reset"/> <input type="button" value="Run Reminder Recall"/> <input type="button" value="Schedule"/>	

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



**Table 11-1: Mass Immunizations Reminder Recall Parameter Field Descriptions**

ITEM	DESCRIPTION
<b>DO NOT INCREMENT RECALL COUNT (RUN RECALL)</b>	<p>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.</p> <p>The recall count is reset for a patient once a historical or administered vaccination is entered.</p> <p><b>Note:</b> 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.</p>
<b>PREVIEW AND SELECT PATIENTS</b>	<p>If you want the opportunity to preview and edit (select patients) the final list, point and click the Preview and Select Patients checkbox.</p> <p>The recall count does not get incremented for patients that are removed from the recall list.</p>
<b>REMINDER/RECALL DATE RANGE (FROM AND TO)</b>	<p>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 <b>MUST</b> have a date.</p> <p><b>Note:</b> If this is for a reminder, enter future date range; otherwise, if this is a recall, enter historic date range.</p>
<b>MAXIMUM RECALL TRIES</b>	<p>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.</p>
<b>VALID ADDRESSES</b>	<p>This is to select only those patients that have:</p> <ul style="list-style-type: none"><li>• Valid Addresses Only</li><li>• Invalid Addresses Only</li></ul>



ITEM	DESCRIPTION
	<ul style="list-style-type: none"> <li>All Patients (Valid and Invalid)</li> </ul>
<b>LIMIT REMINDER/RECALL GROUP BY</b>	Allows you to place limitations on the “checked” items; thus, limiting the data that is to be retrieved.
<b>IRMS DO NOT LIMIT</b>	As a default, the Do Not Limit radio button will be checked.
<b>FACILITY DO NOT LIMIT</b>	<p>As a default, the Do Not Limit radio button will be checked.</p> <p>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.</p> <p><b>Note:</b> 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.</p>
<b>CAMPAIGN</b>	Limits the Reminder Recall generation by the Campaign name. Click the drop-down menu arrow to view/select a valid choice.
<b>TIER</b>	Limits the Reminder Recall generation by Campaign Tier level. Click the drop-down menu arrow to view/select a valid choice.
<b>VACCINE FAMILIES: AND OPTIONAL NEEDED DOSE NUMBER:</b>	<p>Allows specific Vaccine Families to be chosen for the Reminder/Recall generation. By default, all of the Vaccine Families are selected (checked).</p> <p>Optionally, you can type the Dose Number in the field provided to isolate to a specific dose number.</p>
<b>NAME OF PERSON RUNNING REMINDER/RECALL</b>	Type the name of the person running the report.
<b>CLICK <u>HERE</u> TO GO TO PREVIOUS RESULTS FROM RUN ON MONTH, DAY, YEAR, TIMESTAMP</b>	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**

Reminder/Recall Output Select	
Select	Output Type:
<a href="#">select</a>	Patient Listing
<a href="#">select</a>	Mailing Labels (Avery 5160)
	<input checked="" type="radio"/> Postcards (Avery 8387) <input type="radio"/> Letters
	Output Language: <span>ENGLISH</span> <input type="button" value="v"/>
	<i>Please enter the Facility Return Address information below:</i>
<a href="#">select</a>	Facility Name: <input type="text"/>
<a href="#">Preview</a>	Street: <input type="text"/>
	City, State, Zip Code: <input type="text"/>
	Phone Number: <input type="text"/>
<a href="#">select</a>	AutoDialer File
<a href="#">select</a>	Mail Merge File
	Email Reminders
	<i>Please enter the Facility Return Address information below:</i>
<a href="#">select</a>	Facility Name: <input type="text"/>
	Street: <input type="text"/>
	City, State Zip Code: <input type="text"/>
	Phone Number: <input type="text"/>
<input type="button" value="Back"/>	



**Figure 11-5: Mass Immunizations Reminder Recall Criteria Used**

Reminder/Recall Criteria Used	
Limit By IRMS / IRMS ID	Yes / 1000
Do Not Increment Recall Count?	Yes
Reminder/Recall Date	01/01/1989 to 06/20/2008
Maximum Recall Tries	5
Include Inactive Patients	No
Limit By Patient Birth Date Range / Patient Birth Range	No /
Limit By Appointment Date Range	No /
Limit By Facility / Facility Name	No /
Limit By Physician / Physician Name	No /
Limit By Program / Program Code	No /
Limit By Health Plan / Health Plan Code	No /
Limit By State / State	No /
Limit By County / County	No /
Limit By Zip Code / Zip Code	No /
Limit By Health District/Region / Health District/Region	No /
Limit By Association / Association	No /
Person Running Reminder/Recall	Sherri
Deferred Vaccinations Only:	No
Do Not Include Confidential Vaccinations:	No
Vaccine Family Codes To Remind/Recall For	FLU, PNEUMO (PCV7), PNEUMO (PPV23)
Limit By High Risk Category	No / All High Risk Patients

**Figure 11-6: Mass Immunizations Reminder Recall Print Settings**

Reminder/Recall Print Settings	
<p>Be sure to remove the Header and Footer before printing. To do this configure your browser by selecting File--&gt;Page Setup... from the menu and deleting all text in the Header and Footer text fields.</p>	
<p>Postcards (Avery 8387):</p>	<p>In order for your data to print out with the correct spacing (to fit Avery 8387 postcards), configure your browser by selecting File--&gt;Page Setup... from the menu and setting the margins as follows:</p> <p><b>Internet Explorer</b></p> <ul style="list-style-type: none"> <li>• Select Landscape Orientation</li> <li>• top: 0.75"</li> <li>• bottom: 0.25"</li> <li>• left: 0.25"</li> <li>• right: 0.25"</li> </ul>

- 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**

OUTPUT TYPE	DESCRIPTION
<b>AUTO DIALER</b>	Displays a comma-delimited file that can be saved as a TXT file.
<b>EMAIL REMINDERS</b>	Displays the patient, guardian, and email addresses of several patients on a list providing the option to send all the emails.
<b>MAIL MERGE</b>	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.”
<b>MAILING LABELS</b>	(Avery 5160) Displays/prints three labels across and ten labels down, or thirty labels per sheet.
<b>PATIENT LISTING</b>	Displays/prints the report criteria, total patients selected, and chart number in order of last name for each patient listed.
<b>POSTCARDS OR LETTERS</b>	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.

2. **POSTCARDS** and **EMAIL REMINDERS** require additional steps **BEFORE** clicking the **SELECT**



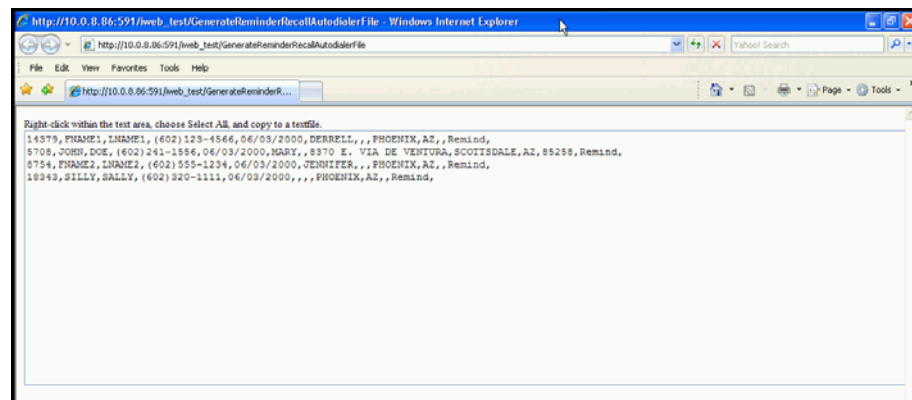
hyperlink. Continue to the sections titled, “Postcards,” and “Email Reminders” for instructions.

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**



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**

Patient	Guardian	Email Address
FNAME1 LNAME1	DERRELL	
JOHN DOE	MARY	
FNAME2 LNAME2	JENNIFER	
SILLY SALLY		

Cancel Send Emails

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.



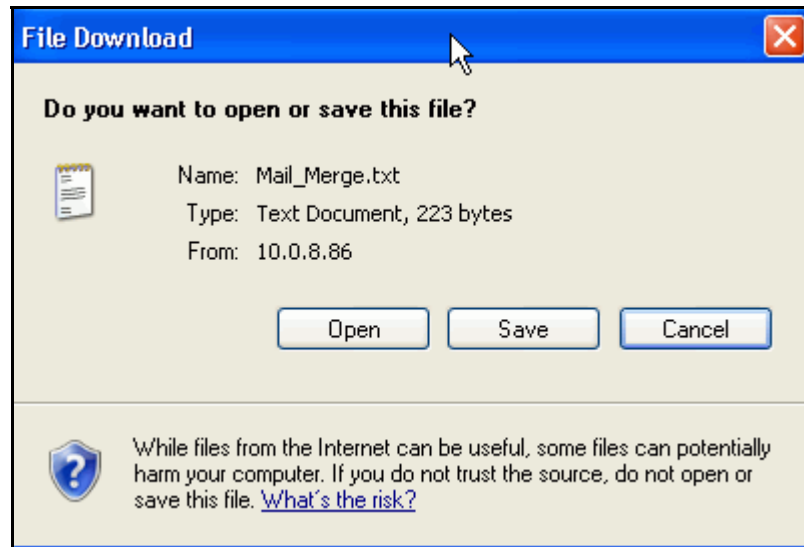
---

## 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.

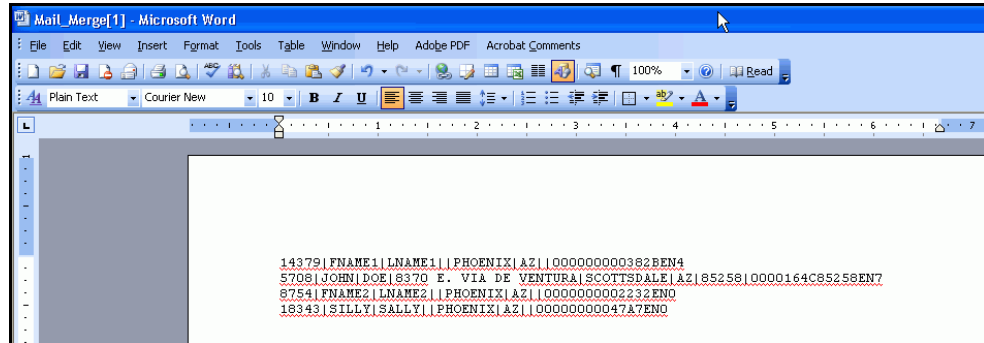
**Figure 11-9: Mass Immunizations Reminder Recall – Mail Merge  
File Download**



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.



Figure 11-10: Mass Immunizations Reminder Recall – Mail Merge



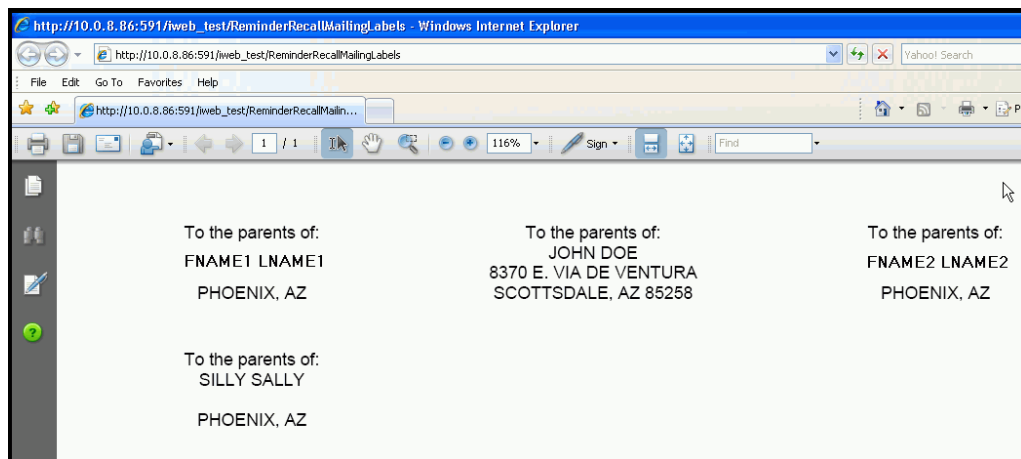
3. Refer to the MS Word instructions for “Mail Merge.”

## 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							
Report Criteria				Report Date: June 20, 2008			
IRMS: 1000 Recall Date: 01/01/1989 to 06/20/2008 Birth Date Range: All Include Inactive Patients: No State: All High Risk Category: All Deferred Vaccinations Only: No Vacc. Families: FLU, PNEUMO (PCV7), PNEUMO (PPV23) Person Generating Recall: Sherri				Facility: All Health Plan: All Physician: All Program: All County/Parish: All Zip Code: All District/Region Number: All			
*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 Hep-B schedule, they should not be changed to the 2 dose schedule.							
Total Patients Selected: 4							
Bar Code/ID 	First Name FNAME1	Middle Name	Last Name LNAME1	Birthdate 06/03/2000	Guardian F.N. DERRELL	Phone Number (602)123-4566	Chart Number
Vaccine Family Name		Dose Number		Recommended Date		Minimum Date	
FLU		1		12/03/2000		12/03/2000	
Bar Code/ID 	First Name JOHN	Middle Name ALLEN	Last Name DOE	Birthdate 06/03/2000	Guardian F.N. MARY	Phone Number (602)241-1556	Chart Number
Vaccine Family Name		Dose Number		Recommended Date		Minimum Date	
FLU		1		12/03/2000		12/03/2000	
Bar Code/ID 	First Name FNAME2	Middle Name	Last Name LNAME2	Birthdate 06/03/2000	Guardian F.N. JENNIFER	Phone Number (602)555-1234	Chart Number
Vaccine Family Name		Dose Number		Recommended Date		Minimum Date	
FLU		1		12/03/2000		12/03/2000	
Bar Code/ID 	First Name SILLY	Middle Name	Last Name SALLY	Birthdate 06/03/2000	Guardian F.N.	Phone Number (602)320-1111	Chart Number
Vaccine Family Name		Dose Number		Recommended Date		Minimum Date	
FLU		1		12/03/2000		12/03/2000	

## 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.



## Mass Immunizations Reminder Recall

**Figure 11-13: Mass Immunizations Reminder Recall – Postcards Options**

Reminder/Recall Postcard Options	
Select Template	Postcard Message
<input checked="" type="radio"/> Default	<p>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.</p> <p><a href="#">Print</a></p>
<input type="radio"/> User Defined	<p></p> <p><a href="#">Save &amp; Print</a></p>
<p><a href="#">Return to Reminder Recall Output</a></p>	



**Figure 11-14: Mass Immunizations Reminder Recall – Letters Options**

Reminder/Recall Letter Options	
Select Template	Letter Message
<input checked="" type="radio"/> Default	<p>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.</p> <p><a href="#">Print</a></p>
<input type="radio"/> User Defined	<p></p> <p><a href="#">Save &amp; Print</a></p>
<p><a href="#">Return to Reminder Recall Output</a></p>	

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.



## Mass Immunizations Reminder Recall





**Figure 11-15: Mass Immunizations Reminder Recall – Default Postcards Output**

<p>STC 8370 E Via De Ventura Scottsdale, AZ 85258 (602)241-1502</p> <p><b>RETURN SERVICE REQUESTED</b></p> <p>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.</p>	<p>To the Parent/Guardian of:</p> <p><b>FNAME1 LNAME1</b></p> <p>PHOENIX, AZ</p>	<p>STC 8370 E Via De Ventura Scottsdale, AZ 85258 (602)241-1502</p> <p><b>RETURN SERVICE REQUESTED</b></p> <p>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.</p>	<p>To the Parent/Guardian of:</p> <p><b>JOHN DOE</b> 8370 E. VIA DE VENTURA SCOTTSDALE, AZ 85258</p>
<p>STC 8370 E Via De Ventura Scottsdale, AZ 85258 (602)241-1502</p> <p><b>RETURN SERVICE REQUESTED</b></p> <p>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.</p>	<p>To the Parent/Guardian of:</p> <p><b>FNAME2 LNAME2</b></p> <p>PHOENIX, AZ</p>	<p>STC 8370 E Via De Ventura Scottsdale, AZ 85258 (602)241-1502</p> <p><b>RETURN SERVICE REQUESTED</b></p> <p>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.</p>	<p>To the Parent/Guardian of:</p> <p><b>SILLY SALLY</b> PHOENIX, AZ</p>

- 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**

<p>STC 8370 E Via De Ventura Scottsdale, AZ 85258 (602)241-1502</p> <p><b>RETURN SERVICE REQUESTED</b></p>  <p>Dear Parent or Guardian,</p> <p>Our records indicate your child may be due for one or more immunizations.</p> <p>Please call the clinic to schedule an appointment.</p> <p>If your child has been vaccinated by another provider or is no longer a patient of this clinic, please let us know so we can update our records.</p> <p>We look forward to hearing from you soon!</p>	<p>To the Parent/Guardian of:</p> <p><b>RAVEN DEROUEN</b> PHOENIX, AZ</p>	<p>STC 8370 E Via De Ventura Scottsdale, AZ 85258 (602)241-1502</p> <p><b>RETURN SERVICE REQUESTED</b></p>  <p>Dear Parent or Guardian,</p> <p>Our records indicate your child may be due for one or more immunizations.</p> <p>Please call the clinic to schedule an appointment.</p> <p>If your child has been vaccinated by another provider or is no longer a patient of this clinic, please let us know so we can update our records.</p> <p>We look forward to hearing from you soon!</p>	<p>To the Parent/Guardian of:</p> <p><b>JOHN DOE</b> 8370 E. VIA DE VENTURA SCOTTSDALE, AZ 85258</p>
<p>STC 8370 E Via De Ventura Scottsdale, AZ 85258 (602)241-1502</p> <p><b>RETURN SERVICE REQUESTED</b></p>  <p>Dear Parent or Guardian,</p> <p>Our records indicate your child may be due for one or more immunizations.</p> <p>Please call the clinic to schedule an appointment.</p> <p>If your child has been vaccinated by another provider or is no longer a patient of this clinic, please let us know so we can update our records.</p> <p>We look forward to hearing from you soon!</p>	<p>To the Parent/Guardian of:</p> <p><b>JADA HEBERT</b> PHOENIX, AZ</p>	<p>STC 8370 E Via De Ventura Scottsdale, AZ 85258 (602)241-1502</p> <p><b>RETURN SERVICE REQUESTED</b></p>  <p>Dear Parent or Guardian,</p> <p>Our records indicate your child may be due for one or more immunizations.</p> <p>Please call the clinic to schedule an appointment.</p> <p>If your child has been vaccinated by another provider or is no longer a patient of this clinic, please let us know so we can update our records.</p> <p>We look forward to hearing from you soon!</p>	<p>To the Parent/Guardian of:</p> <p><b>SILLY SALLY</b> PHOENIX, AZ</p>






## Mass Immunizations Reminder Recall

**Figure 11-17: Mass Immunizations Reminder Recall – Default Letters Output**

<p>From: <b>STC</b> 8370 E Via De Ventura Scottsdale, AZ 85258 (602)241-1502</p>	
<p>To the Parent/Guardian of: <b>FNAME1 LNAME1</b>  PHOENIX, AZ</p>	
<p>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.</p>	
<p>From: <b>STC</b> 8370 E Via De Ventura Scottsdale, AZ 85258 (602)241-1502</p>	
<p>To the Parent/Guardian of: <b>JOHN DOE</b> 8370 E. VIA DE VENTURA SCOTTSDALE, AZ 85258</p>	
<p>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.</p>	
<p>From: <b>STC</b> 8370 E Via De Ventura Scottsdale, AZ 85258 (602)241-1502</p>	
<p>To the Parent/Guardian of: <b>FNAME2 LNAME2</b>  PHOENIX, AZ</p>	
<p>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.</p>	



**Figure 11-18: Mass Immunizations Reminder Recall – User Defined Letters Output**

<p>From: <b>STC</b> 8370 E Via De Ventura Scottsdale, AZ 85258 (602)241-1502</p> <p>To the Parent/Guardian of: <b>FNAME1 LNAME1</b></p> <p>PHOENIX, AZ</p> <p>Dear Parent/Guardian,</p> <p>Our records indicate that your child may be due for one or more immunizations.</p> <p>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.</p> <p>We look forward to hearing from you soon.</p>	
<p>From: <b>STC</b> 8370 E Via De Ventura Scottsdale, AZ 85258 (602)241-1502</p> <p>To the Parent/Guardian of: <b>JOHN DOE</b> 8370 E. VIA DE VENTURA SCOTTSDALE, AZ 85258</p> <p>Dear Parent/Guardian,</p> <p>Our records indicate that your child may be due for one or more immunizations.</p> <p>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.</p> <p>We look forward to hearing from you soon.</p>	
<p>From: <b>STC</b> 8370 E Via De Ventura Scottsdale, AZ 85258 (602)241-1502</p> <p>To the Parent/Guardian of: <b>FNAME2 LNAME2</b></p> <p>PHOENIX, AZ</p> <p>Dear Parent/Guardian,</p> <p>Our records indicate that your child may be due for one or more immunizations.</p> <p>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.</p> <p>We look forward to hearing from you soon.</p>	





- 
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 **REMINDER 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.



**Figure 11-19: Mass Immunizations Reminder Recall Scheduler**

Scheduler

Select Schedule Parameters

Run now:

☐ (Report will run now and will **not** be scheduled for additional runs)

Minute:

:00

Hour:

12 A.M.

Day of Month:

Month:

Day of Week:

Select the IRMSs, facilities, and enter email addresses the report should be sent to..

IRMS:

Select an IRMS

AMIT  
BRANDY VOMS  
BRANDY VOMS 2  
CLIENT\_SERVER\_INTERNAL\_IRMS\_ID  
GARY RECIEVE ORDERS TEST  
GARY TEST ORDERS

Facility:

Select a Facility

ARAPAHOE HC  
ARAPAHOE SC  
BARROW HOSP  
BRANDY VOMS FACILITY  
CATTARAUGUS HEALTH CENTER  
CHAPIN ST. CLINIC

Please add email addresses separated by commas..

Back

Schedule

- The fields and their descriptions are listed in the table:

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

FIELD	DESCRIPTION
<b>RUN NOW</b>	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.
<b>MINUTE</b>	The minutes that can be chosen are in five-minute intervals and will be used with the <b>HOURS</b> field to indicate the “kick off” time for the report to run. Click on the drop-down menu arrow to view/select



## Mass Immunizations Reminder Recall

FIELD	DESCRIPTION
	a valid choice. "00" is the default.
<b>HOUR</b>	The hours are an hour apart and will be used with the <b>MINUTES</b> 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.
<b>DAY OF MONTH</b>	Specific day of the month the report should run. If a blank appears, the report will run <b>EVERY DAY</b> . Click on the drop-down menu arrow to view/select a valid choice. A "blank or every day" is the default.
<b>MONTH</b>	Specific month the report should run. If a blank appears, the report will run <b>EVERY MONTH</b> . Click on the drop-down menu arrow to view/select a valid choice. A "blank or every month" is the default.
<b>DAY OF WEEK</b>	Specific day of week the report should run. If a blank appears, the report will run <b>EVERY DAY</b> . Click on the drop-down menu arrow to view/select a valid choice. A "blank or every day" is the default.
<b>IRMS</b>	Select one or more <b>IRMSes</b> you want to send the report to. <b>Note:</b> Multiple selections can be made by holding down the <b>CTRL</b> key while clicking <b>IRMSes</b> .
<b>FACILITY</b>	Select one or more <b>FACILITIES</b> you want to send the report to. <b>Note:</b> Multiple selections can be made by holding down the <b>CTRL</b> key while clicking <b>FACILITIES</b> .
<b>EMAIL</b>	Type the email address the report should be sent to. If there is more than one email address, separate them with a comma.

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

User Scheduled Tasks					
IRMS	Username	Name	Schedule	Next Run Time	
	SHERRI_RC	<a href="#">Reminder Recall</a>	Day 23 of every month. At 12:50 PM	7/23/08 at 12:50 PM	<a href="#">Delete</a>
View Log					

## 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

User Scheduled Tasks					
IRMS	Username	Name	Schedule	Next Run Time	
	RC	<a href="#">Reminder Recall</a>	Every day at 07:00 AM	7/19/08 at 7:00 AM	<a href="#">Delete</a>

Edit Scheduled Tasks	
<b>Task Name:</b>	Reminder Recall
<b>Minute:</b>	:00
<b>Hour:</b>	7 A.M.
<b>Day of Month:</b>	
<b>Month:</b>	
<b>Day of Week:</b>	
<b>Task:</b>	Reminder Recall

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**

Scheduled Report Log					
Username	Description	Begin Time	End Time	Status	Error
					<a href="#">Back</a>

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

**Table 11-4: Mass Immunizations Scheduled Report Log  
Field/Column Descriptions**

FIELD	DESCRIPTION
<b>USERNAME</b>	User that scheduled the report.
<b>DESCRIPTION</b>	Report Description (Title).
<b>BEGIN TIME</b>	Time that the report began to run.



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FIELD	DESCRIPTION
END TIME	Time the report completed running.
STATUS	Status of the report.
ERROR	Error text if the report didn't run.

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