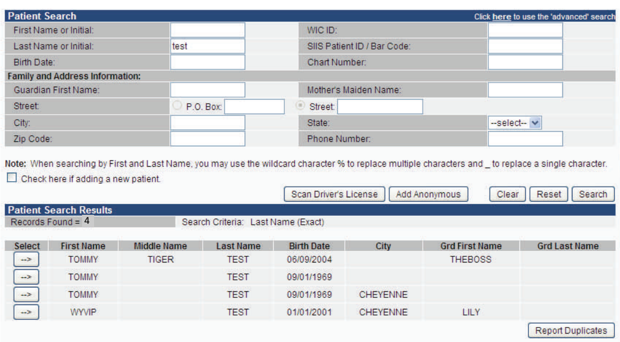
Search for a Patient

1. Using the navigation menu click on the **Patient** menu heading.
2. Click on the words **Search/Add**.
3. Enter the search criteria, i.e., patient's name, birth date, etc.. (Enter the birth date as a string of numbers: i.e., enter April 20, 2011 as 04202011).
4. Click ***Search*** or hit the ***Enter*** key on the keyboard.
5. If the patient appears in the Search Results, click on the arrow button to the left of the patient's name to view the patient's demographic information (Reference the *Patient Search Diagram 2* for an example of the **Patient Search** screen).
6. Check the *Vaccination Quick Reference Guide* for the steps to view a patient's immunization history.

<u>Diagram 1: Patient Search</u>



4 records were found. Look for differences such as Birth Date or Name to select the correct patient.

NOTE: An option exists to scan a patient's driver's license to search/add patient information. This options displays if it is enabled for an office. Please contact the WyIR Help Desk for further assistance if interested.

Search Tips

Use of the WyIR is optional and not a requirement, therefore patients may or may not be in the system.

First*, try searching by:*

- Patient's first initial of first name, first initial of last name, and birth date.

If the patient is not found, try searching again by:

- Patient's first initial and date of birth.
- Patient's last name initial and date of birth.
- Patient's first and last names without the date of birth.
- SIIS Patient ID is a patient identifier unique to the WyIR.

If a patient Is not located, redefine the search criteria and try again. *Reference <u>Adding a New Patient</u> if the search results don't yield a patient.*

Duplicate Patient Records

If a duplicate patient record is located within the WyIR, click on the **Report Duplicates** button at the bottom of the patient search/results screen, and follow the prompts.

Feel free to add appropriate comments regarding the merge request in the comments section located above the **Merge** button prior to clicking upon the button.

The records are presented to the WyIR Project Coordinator upon login the next business day for deduplication.

Add Anonymous

If a patient wishes to not have their records display in the WyIR, click upon the **Add Anonymous** button and follow the prompts. By adding them within the WyIR, the inventory will be decremented accordingly for each dose administered to the patient, but no patient information will be recorded.

Adding a New Patient

Make sure *Search Tips* has been referenced before adding a new patient. This may help reduce duplicate records.

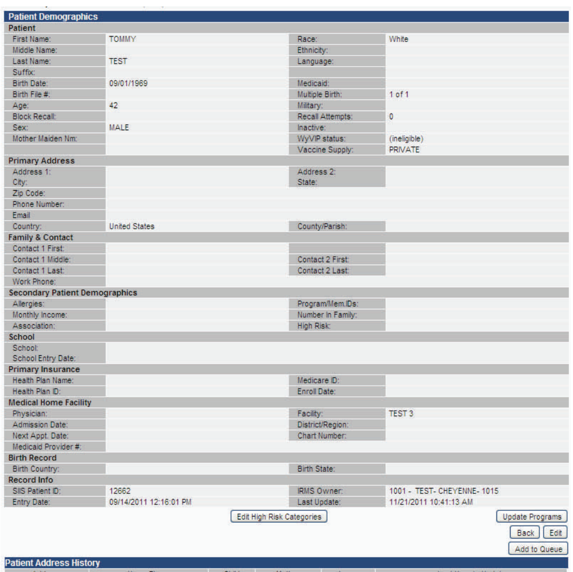
1. When using the Search Page, click the "**check here if adding a new patient**" box at the bottom of the Patient Search fields (circled on Diagram 1: Patient Search).
2. Enter all of the required information (highlighted in red.)
3. Click *Search*.
4. A dialog box will appear with one of the following messages:
   - *Before adding, make sure the patient being added is not listed in the Patient Search Results.*
   - *This record already exists in the database. An exact match has been found.*

   Click **OK** to close the box.
   NOTE*: If the system finds an exact match, the system will not allow a new patient record to be added.*
5. **If a possible match is found**, select the patient by clicking on the arrow to the left of the patient's name.
6. **If no match is found**, click ***Add Patient***. The system will go to the Patient Demographic page.
7. Enter patient information into the required fields as highlighted in red *(For more information, reference Update/Edit a Patient's Record and Editing Guide that follows on the reverse side).*
8. Click ***Add Patient*** at the bottom of the Patient Demographic page to add the patient to the WyIR.

Update/Edit a Patient Record

1. Search for a patient.
2. Select the appropriate patient from the **Search Results** by clicking the arrow button to the left of the patient's name.
3. On the Patient Demographic page (*Reference Diagram 2*), click the **Edit** button on the bottom.
4. The user will be brought to the Patient Demographic Edit page. All fields can now be edited.
5. Make modifications in the appropriate fields (*Reference Editing Guide in next column*).
6. Click ***Save*** to keep the changes.
7. To cancel changes, click ***Cancel*** to go back to the previous screen.

Diagram 2: Patient Demographics Screen



Editing Guide

NOTE: If a user wishes to edit any field on the demographic page, the system will not allow submission of changes unless data for all the required fields has been provided.

- **Gender:** Confirm that the patient's gender is marked on the demographic page.
- **Birth Order and Multiple Birth Count:** If the patient is a twin, triplet, etc., enter the number of total births in the Birth Order field.
- **Facility and Physician:** If working for a multi-facility office, a patient may be linked to a particular facility or physician. Click on the appropriate name from the drop-down menu. This will allow the user to run several reports by facility and/or physician.
- **Chart Number:** In order to search for a patient by chart number, add the patient's chart number in the Chart Number field.
- **Do not take ownership of this record:** If adding information to the demographic page, or adding a flu vaccination to the patient record, and the provider does not routinely see the patient (e.g., flu clinic), click on the check box next to "do not take ownership" on the bottom of the Demographic Edit screen and Vaccination View/Add screen.

High Risk Categories

This feature allows the user to select high-risk medical categories appropriate for the patient. These categories make it easier to identify patients who may have special immunization needs.

1. From the Patient Demographic page, click the **Edit High Risk Categories** button (Reference *Diagram 2*).
2. The screen will change to the Patient High Risk Categories page. There will be two available category boxes—Available Categories and Current Categories.
3. To add a high-risk category to the patient's record, highlight the appropriate category name under the Available Categories list by clicking on it. Then click the middle arrow that points to the right to move it to Current Categories.
4. To remove a high-risk category, highlight the category name under the Current Categories list by clicking upon it. Then click the middle arrow that points to the left to move the category name back to Available Categories.
5. A red confirmation message will appear at the top of the window stating "Patient High Risk Categories Successfully Changed."
6. Click the **Back** button to return to the Patient Demographics page.

Patient Specific Reports

The following reports are available once a patient has been selected:

Official Record of Immunization

1. Using the navigation menu, click on the **Reports** heading menu.
2. Click on **State Reports**.
3. Under the Patient Specific heading, click on the **School Form** link.
4. Print the form for each patient, as necessary.

NOTE: If the facility information is missing on the forms, select a facility and reprint the form.

Patient Routing Slip

If an office does not have a computer workstation in the same room where vaccinations are given, this report may help ensure that the proper vaccination is given on time, and that the information is recorded accurately in the WyIR. After the patient presents at the front desk for check-in, conduct the following steps:

1. Using the navigation menu, click on the **Reports** heading menu.
2. Click on **State Reports**.
3. Under the Patient Specific heading, click on **Patient Routing Slip**.
4. Print off the form and give it to the vaccination administration staff to verify the information prior to administering recommended vaccinations..
5. Document the empty fields upon the form, and then enter the information into the WyIR.