Search for a Patient

1. Log in to the WyIR. Click Patient from the left side navigation menu, then click on Search/Add

2. Enter the search criteria – patient's name, date of birth, etc. Then, click Search or hit the Enter key on your keyboard.

3. Review the Search Results below; if the correct patient appears, click on the patient's name to view their demographic information. For steps to view the patient's immunization history or enter a vaccine, please see the *Vaccinations Quick Reference Guide.*

Search Tips

To complete a thorough search, 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 by:

- Patient's first initial of first name and date of birth;

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

- Patient's first and last names without a date of birth; or

- SIIS Patient ID (a patient identifier unique to the WyIR).

Reference the *Adding a New Patient* section on page (2) if the search results don't yield the patient you're looking for.

NOTE: Patients can opt out of the WyIR. Additionally, up until Feb 2018, reporting to the WyIR was not mandatory for healthcare providers. For both of these reasons, patients may not be found in the WyIR.

Duplicate Patient Record

If duplicate records are identified while reviewing the Patient Search Results, click the Report Duplicates button at the bottom of the results. From the Report Duplicate Patients page, select each duplicate record. Then, select a "Reason for deduplication" from the dropdown menu at the top of the page, and click the Report Duplicates button at the bottom.

The next page will ask you to select a Master Patient. The Master Patient record will be the record that absorbs the additional record(s). This should be the newest and/or most complete record with the most accurate demographic information. For example: If one record uses the patient's shortened name like Mike, and one record uses their legal name like Michael, choose the legal name as the Master Patient. Include any comments or information regarding the merge in the comment section below, then click Merge. The records will then be sent for review by the WyIR team.

Adding a New Patient

BEFORE ADDING A NEW PATIENT—All Search Tips should have been used to help reduce duplicate records.

1. When using the Search Page, check the "Check here if adding a new patient" box below the Patient Search section. See #1 in the image on Page (3).

2. After checking the box, all the required fields will be highlighted in red. Enter all of the required information, then click Search.

3. 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." or

-   "This record already exists in the database. An exact match has been found."

NOTE: If the system finds an exact match, it will NOT allow a new patient record to be added.

Click **OK** to close the box.

4. **If a possible match is found**, review the patients in the Patient Search Results. As a reminder, duplicate patient records should not be created. If the patient you were attempting to add presents in the results, select the patient by clicking on their name and proceed with viewing or editing the patient as needed. For steps to view the patient's immunization history or enter a vaccine, please see the *Vaccinations Quick Reference Guide.*

5. **If no match is found**, click Add Patient on the bottom right. See #2 in the image on Page (3).

6. From the Patient Demographic page, enter patient information into the required fields which are highlighted in red. (*For more information, reference the Editing Guide on the next page.*) Then, click Add Patient at the bottom. See #2 in the image on Page (3).

Add Anonymous

Every patient has the right to opt out the WyIR; however, every immunizing facility is required to report administered vaccinations. If a patient you have vaccinated wishes to not have their identifiable information display in the WyIR, click the **Add Anonymous** button from the Patient Search page. See #3 in the image above. The next screen will ask for a Birth Date and WyVIP status, then click **Add Patient**. By adding the anonymous patient, the facility can report vaccines administered to this individual to meet mandatory reporting requirements and decrement their inventory accordingly, but no identifiable patient information will be recorded.

Update/Edit a Patient Record

1. Search for a patient using the guidance on Page (1).

2. Select the appropriate patient from the Search Results by clicking the patient's name.

3. On the Patient Demographic page, click the **Edit** button at the bottom. See the image on Page (4).

4. The Patient Demographic Edit page now displays, and all fields can now be edited. Make the appropriate modifications.

5. Click **Save** to keep the changes or click **Cancel** to go back to the previous screen.

Editing Guide

Completing a patient's record with accurate information is vital. Careful attention should be paid to spelling and numerical entry. Data entry errors can make it difficult or impossible for a patient to obtain their vaccine history.

♦ **Required Fields**: If a user wishes to edit a patient record, the system will not allow submission of changes unless data for all the required fields has been provided.

♦ **Non-Required Fields**: The more information provided about each patient, the better. Each field, regardless of requirement, can be used as an identifier for that patient. Many times, the WyIR team relies on those to verify identity. Information such as insurance status can also help identify health disparities in our state which is important for providing resources.

♦ **Birth Order**: If the patient is a twin, triplet, etc., it is very important to enter in a birth order number. This prevents the siblings from being automatically merged into a single record later. If you suspect twins have been merged, please contact the WyIR team with details.

♦ **First Name/Last Name**: The patient's legal first, middle, and last name should be the only name used. Nicknames or shortened names should NEVER be used. For example: Use Michael not Mike, Robert not Bob.

♦ **Family & Contact**: While this is not a required field, it is still necessary to input parent or guardian information. If a parent requests a copy of a child's records and their name is not included on the record, it will require additional actions to verify their relationship to the child prior to releasing the record.

♦ **High Risk Categories**: This feature allows users to select high-risk categories appropriate for a patient who may have special immunization needs. Current selections only include various Hepatitis and TB related categories. This feature is located at the bottom of the Patient Demographics page.

Official Records of Immunization

To print a record of immunization for a patient who has been vaccinated in your facility, see the *Official Record of Immunization* guide.

Patient Routing Slip

If a facility does not have a computer workstation in the same room where immunizations 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. See the *Vaccinations* guide for steps to access this report.