Idaho's Immunization Reminder Information System (IRIS)

User Manual

Version 3.11

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Introduction

In this chapter:

The following sections are an overview of immunization registries reproduced with the permission of All Kids Count, a nonprofit organization dedicated to the improvement of immunization rates in children.

What Are Immunization Registries?

Immunization registries are confidential, computerized state- or community-based information systems. In the *Healthy People 2010* program, the U.S. Department of Health and Human Services set a goal of enrolling 95% of children from birth through age five in a fully functioning immunization registry, noting "Population-based immunization registries will be a cornerstone of the nation's immunization system by 2010."

Registries enable public and private health care providers to consolidate and maintain computerized immunization records on all children within a given geographic area. They enable multiple authorized health care professionals to access the consolidated information on the immunizations that any child has received. They help doctors remind parents when their children are due or overdue for immunizations. They help health care professionals stay abreast of the complex immunization schedule.

Why We Need Immunization Registries

The U.S. now enjoys the highest immunization rates and lowest disease levels ever, but sustaining them is not easy. One of the greatest challenges is the growing complexity and volume of immunization information:

- Over 12,000 children are born each day, each needing 18-22 shots by age six to protect them from debilitating, life-threatening diseases.
- An increasingly complex childhood immunization schedule makes it difficult for health professionals to keep up, even with the help of books, charts, and training.
- Families are more mobile than ever before. They relocate, change employers, change insurers, and change doctors with increasing frequency.
- Research shows that many parents whose children are not up to date with their immunizations mistakenly believe that they are. Many doctors also overestimate the coverage of their patients.
- Because of increasing concerns about vaccine safety, some parents, in the absence of disease, may not choose to immunize their children. Better data about the immunizations given can help address these concerns.

Immunization registries help to avoid the "peaks and valleys" of disease outbreaks by providing accurate, up-to-date information about the immunizations that children receive.

Idaho's Immunization Reminder Information System (IRIS)

The Idaho Immunization Reminder Information System (IRIS) is a population-based web application containing consolidated demographic and immunization history information.

IRIS is completely confidential, voluntary and secure. It allows the Idaho public health departments, enrolled medical providers, local health departments, schools and childcare facilities direct access to a central state immunization registry via the Internet.

IRIS is able to perform a variety of functions for health care providers, including:

- Recording immunizations, contraindications, and reactions.
- Validating immunization history and providing immunization recommendations.
- Producing recall and reminder notices, individual patient reports, and IQIP Assessment reports.
- Management of vaccine inventory, including ordering and recording wastage or returns of public funded vaccine.
- Online re-enrollment to the Vaccine for Children (VFC) program and management of delivery address and staff contacts.
- School and Childcare eligibility, required documentation needed, conditional notice and notice of exclusion reports.

When a provider begins participation in IRIS, they can manually enter immunization data directly into IRIS or utilize their existing electronic data systems to create a data exchange link with IRIS. All children born in Idaho are added to IRIS at birth or a medical provider can add the immunization records into IRIS if they are not in the registry.

System Requirements

In this chapter:

Internet Access

Since IRIS is a web-based application, you will need reliable internet access, preferably with a dedicated high speed connection. A modem connection will also work, but is not recommended.

Hardware Requirements

- The following are minimum hardware requirements for accessing IRIS:
- Pentium 500 MHz computer.
- 64 MB RAM.
- 500 MB free disk space.
- Screen display set at a minimum of 800 x 600 resolution and 256 colors.
- Mouse and keyboard.

Software Requirements

- Internet Browser software.
- Windows® 98 and all subsequent Windows® versions.
- Adobe Acrobat Reader® 6.0 or higher.
- **For networked computers, TCP/IP Port 443 of the network firewall must be open for outgoing HTTPS (secure HTTP) connections to access the IRIS production application**.

Notes: TCP/IP Port 444 of the network firewall must be open to access the IRIS Training application, https://iris.dhw.idaho.gov:444/.

Optimizing Browser Performance

Browser Security

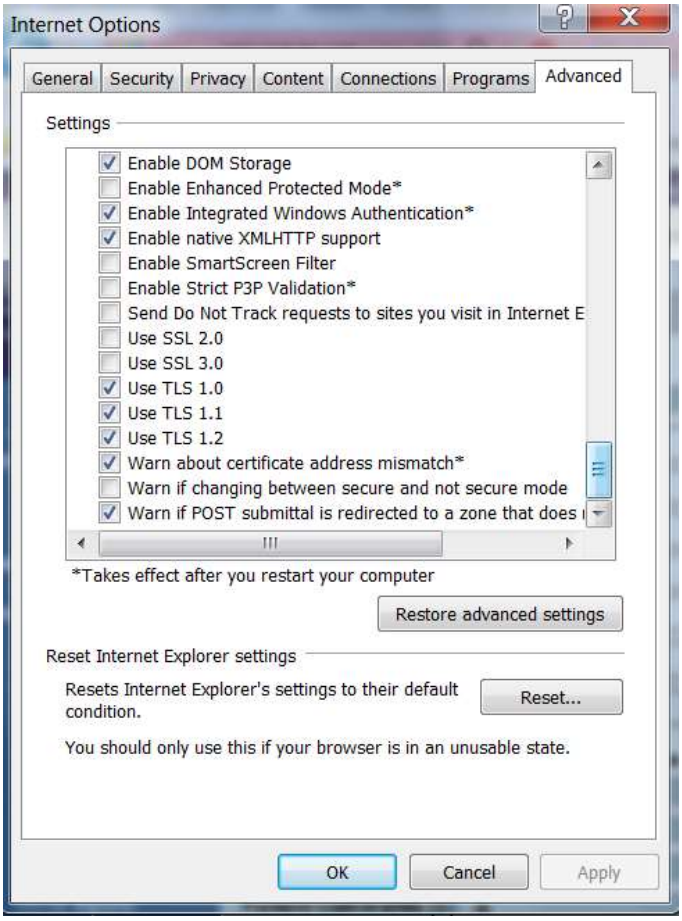
Your browser should be set to use TLS 1.2 encryption or higher. Recent versions of browsers have TLS 1.2 enabled by default. If you have a lower version of the browser, check with your IT support (if applicable) to see if you can update to a recent browser version. You should be able to update most browsers by opening the browser and going to settings and clicking the About… option in the menu.

Browser	TLS 1.2 enabled by default
Microsoft Edge	All Versions
Google Chrome	Version 29 and higher
Mozilla Firefox	Version 27 and higher
Apple Safari	Version 7 and higher

(Internet Explorer)

Note: Microsoft will be ending support for Internet Explorer in August 2021. If you use Internet Explorer as your default browser, check with your IT support (if applicable) to see what browser should be used as a replacement. You may have to manually set TLS encryption to 1.2 by performing the following steps.

1. Click on Tools on your browser's menu bar.
2. Choose Internet Options.
3. Click on the Advanced tab.
4. Click the checkbox for TLS 1.2.

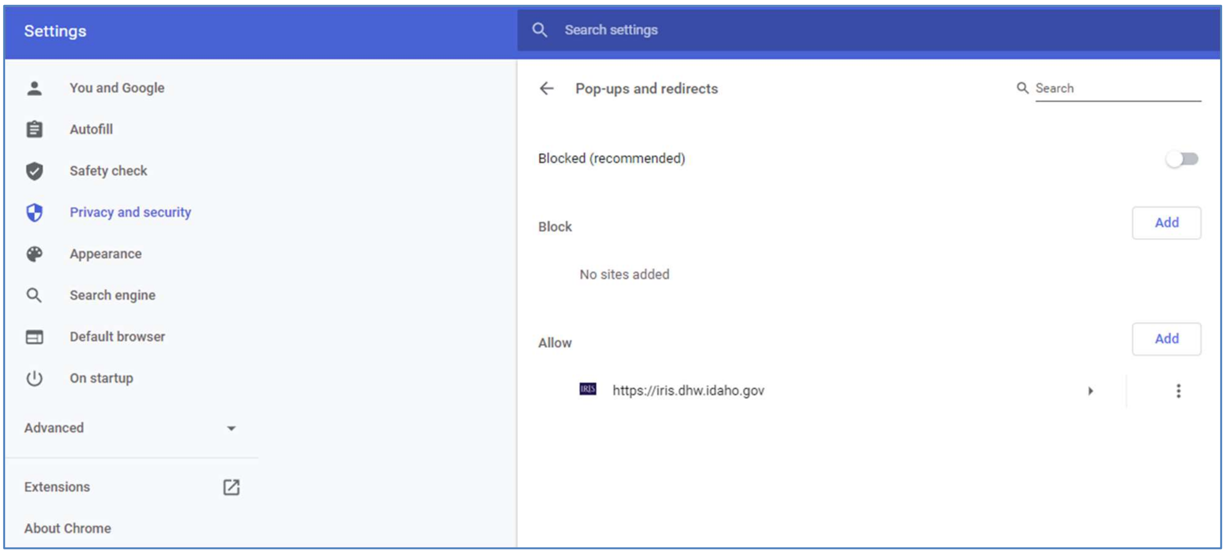


Turn off Popup Blocker

Reports and error messages may appear in popup windows generated by IRIS. Some computers are set to block popups. Your browser should be set to turn off pop-up blocker for the IRIS web site.

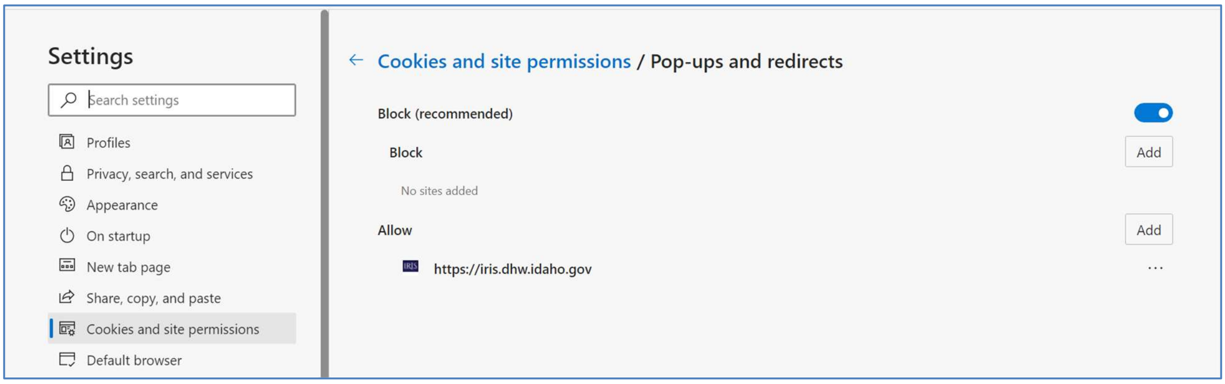
(Google Chrome)

1. Click on Settings on your browser's menu bar.
2. In Privacy and security section, select Site settings
3. In Content section, select Pop-ups and redirects.
4. In Allow section, click Add button
5. Copy the address of the IRIS web site https://iris.dhw.idaho.gov/IRIS/portalInfoManager.do and paste into the '**Add a Site'** field.'
6. Click the Add button.



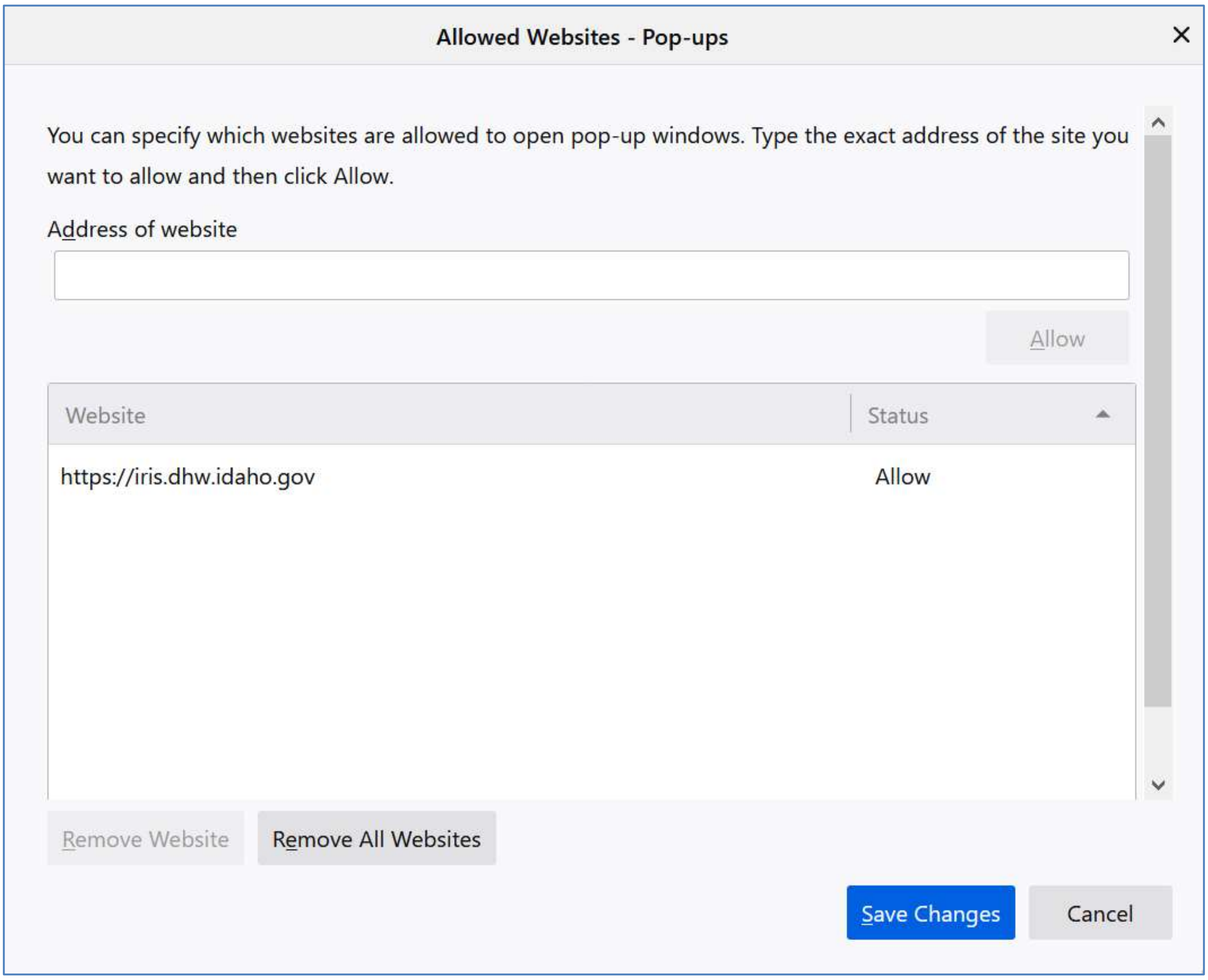
(Microsoft Edge)

1. Click on Settings on your browser's menu bar.
2. Select Cookies and site permissions.
3. Select Pop-ups and redirects.
4. In Allow section, click Add button
5. Copy the address of the IRIS web site https://iris.dhw.idaho.gov/IRIS/portalInfoManager.do and paste into the '**Add a Site'** field.'
6. Click the Add button.



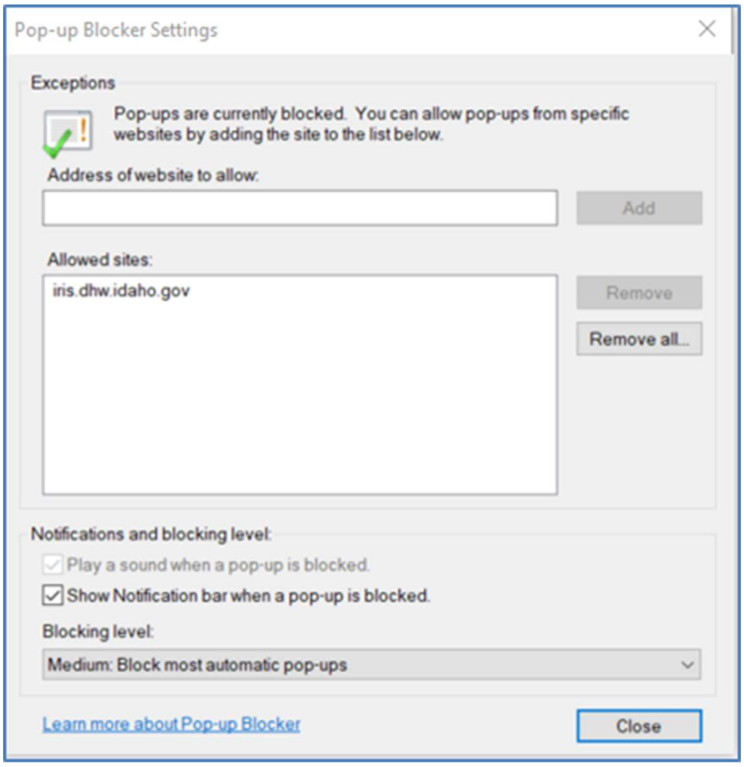
(Mozilla Firefox)

1. Click Options on your browser's menu bar.
2. Select Privacy & Security
3. Scroll down on page and select Block pop-up windows Exception button
4. Copy the address of the IRIS web site https://iris.dhw.idaho.gov/IRIS/portalInfoManager.do and paste into the 'Address of website' field.
5. Click Allow button
6. Click Save Changes button



(Internet Explorer)

1. Click on Tools on your browser's menu bar.
2. Choose Pop-up Blocker.
3. Choose Pop-up Blocker settings.
4. Copy the address of the IRIS web site https://iris.dhw.idaho.gov/IRIS/portalInfoManager.do and paste into the '**Address of website to allow**: field.'
5. Click the Add button.



6. Click the Close button.

Deleting Browsing Data / Temporary Internet Files (Optional)

Unless instructed to do otherwise, your browser will automatically save a copy of each new web page you visit to your computer's hard drive. Over time, these saved files can slow down your browser's performance. To avoid this problem, you may set your browser to automatically delete the temporary Internet files each time the browser is closed.

Note: This will delete your cache of browsing history, download history and site cookies, etc. Frequently used we sites should be saved to your browser Favorites before clearing your temporary cache.

(Google Chrome and Microsoft Edge)

1. Click the Chrome menu on the browser toolbar.
2. Select History.
3. Select Clear browsing data.
4. In the dialog that appears, select the checkboxes for. Browsing history. Cookies and other site data. Cached images and files.
5. Set time range: all time .
6. Click Clear data

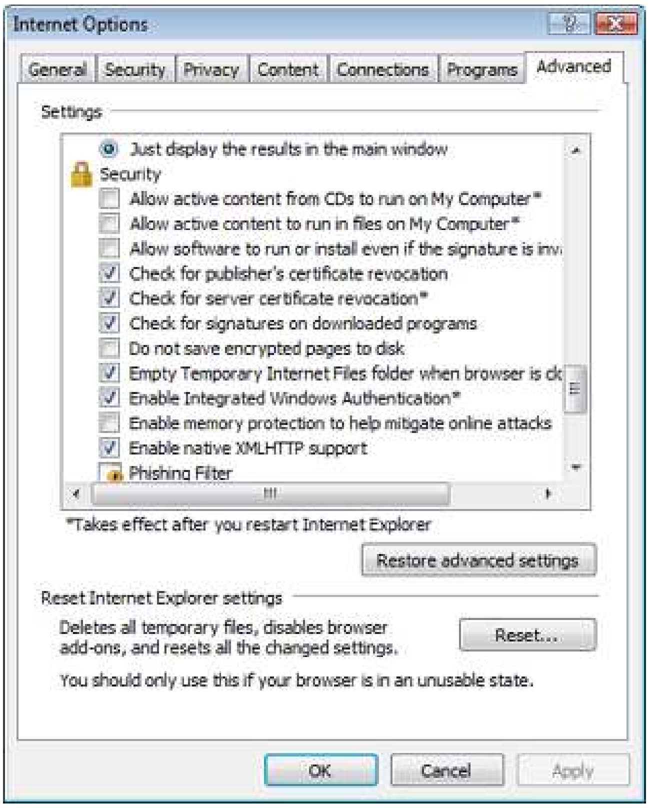
(Mozilla Firefox)

1. Click the Firefox menu on the browser toolbar
2. Select Library.
3. Select History
4. Select Clear Recent History.
5. In the dialog that appears, select time range: everything
6. Click Ok

(Internet Explorer)

To automatically delete all temporary Internet files each time Internet Explorer is closed, follow these steps:

1. Click on Tools on your browser's menu bar.
2. Choose Internet Options.
3. Click on the Advanced tab.

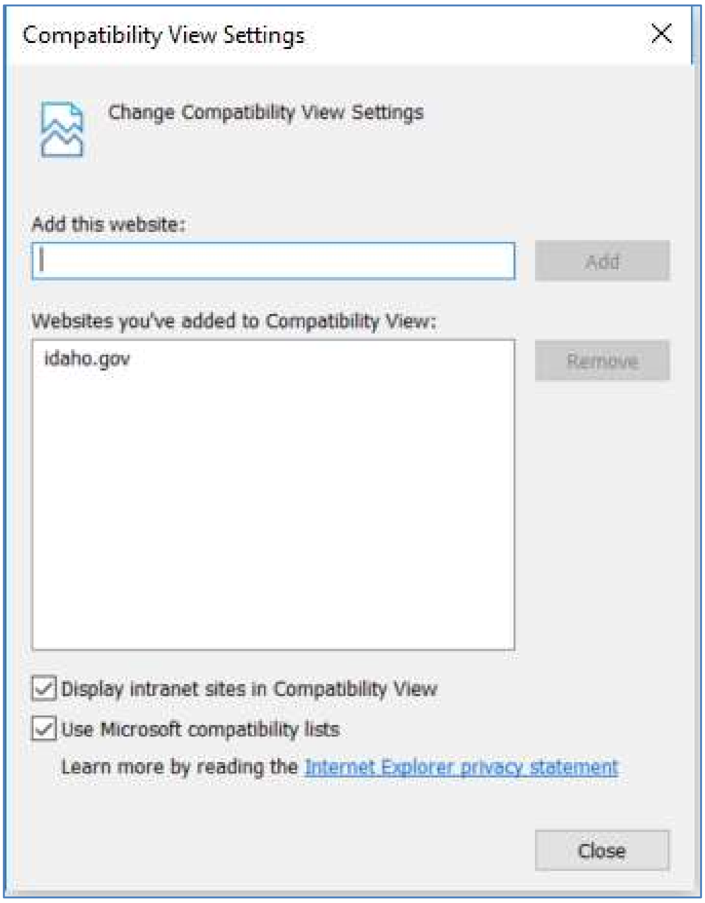


4. Scroll down the list until you see the Security heading.
5. Put a check mark next to the command, "Empty Temporary Internet Files folder when browser is closed."
6. Click OK.

Compatibility Mode (Internet Explorer only)

Compatibility View should be turned on for the IRIS site if using Internet Explorer. To set compatibility mode follow these steps:

1. Open the IRIS website in your browser.
2. Click on Tools on your browser's menu bar.
3. Choose Compatibility View Settings.



4. In the Add This Site Field, the **idaho.gov** should auto-populate. Click on the Add button.
5. Click on the Close button.

Running Reports with Adobe Acrobat Reader®

IRIS uses at a minimum Adobe Acrobat Reader® 6.0 to display reports in portable document file (PDF) format. This format allows you to print reports exactly as they appear online.

Running Acrobat Reader® Files

The first time a report is displayed using Acrobat Reader®, a window may appear asking whether you want to run the file or save the file to disk. Choose "Run the file" and "Do not display this message again."

If you try to print a report in Acrobat® 6.0 and find that some of the text is illegible, choose File, Preferences, and General on the Acrobat® menu bar. In the General Preferences dialog box, make sure the "Smooth Text and Images" box is checked. Subsequent versions of Acrobat® require alternate protocol.

Problems Running Reports in Acrobat®

If, while using Adobe Acrobat Reader® 6.0, you get a small icon resembling a Rubik's cube and the report does not display, Acrobat Reader® needs to be opened in a separate window. To do this, follow these steps:

1. Click the Start button on the lower left corner of your computer screen.
2. Choose Programs.
3. Select Adobe Rea® 6.0 (or higher)
4. On the Acrobat Reader® menu bar, select File.
5. Choose Preferences.
6. Choose General.
7. Under Options, uncheck Web Browser Integration.
8. Click OK.

Try to run your report again. If you continue to have problems, contact the IRIS Help Desk at (208) 334-5995.

File Transfer Protocol Server Access

When running reports and data downloads, IRIS queries a File Transfer Protocol (FTP) server to read the file. If your network has blocked FTP access for any reason or if FTP wasn't installed with your browser, you will be unable to run reports or download data. Contact your information technology (IT) staff if you suspect your FTP access is blocked.

Efficient Screen Navigation

Microsoft® Windows® often allows users several ways to accomplish certain tasks. Because IRIS runs under Windows®, it also allows users to use these methods to enter data. Learning the shortcuts in this section will help you increase your efficiency when entering data in IRIS, particularly by reducing the number of times you will need to switch from keyboard to mouse. These shortcuts will work in almost all Microsoft® software, not just Internet Explorer.

Keyboard Shortcuts in IRIS

Deleting data: When a field or a portion of a field is highlighted, typing something deletes the highlighted information and replaces it with the characters you typed. If you hit the Delete or Backspace key, the highlighted information is deleted. To place the cursor in a specific position within highlighted text, position the cursor where you want it and press the left mouse button once.

Tab*: The Tab key advances the cursor to the next field. Internet Explorer moves through the fields in the order specified by the web page. When the cursor reaches the last field, it advances back to the first field on the screen when Tab is pressed.

Shift+Tab*: Holding down the Shift key and clicking the Tab key will bring the cursor back to the previous field. In Internet Explorer, the cursor will go back to the previous field defined by the web page.

Enter*: In most cases, the Enter key will complete entry of information on the current screen. Most screens have a default button that is activated when the Enter key is pressed — this button could be called Save, Submit, OK, etc.

←(Left Arrow): The left arrow key moves the cursor one character to the left.

→ (Right Arrow): The right arrow key moves the cursor one character to the right.

Ctrl+←: Holding down the Ctrl key and pressing the left arrow key moves the cursor one word to the left.

Ctrl+→: Holding down the Ctrl key and pressing the right arrow key moves the cursor one word to the right.

Ctrl+A: Holding down the Ctrl key and pressing the A key will select all the text in the current field.

Ctrl+C: Holding down the Ctrl key and pressing the C key will copy all highlighted text in the current field to the clipboard without changing the highlighted field.

Ctrl+V: Holding down the Ctrl key and pressing the V key will insert (“paste”) the contents of the clipboard at the current cursor position.

Ctrl+X: Holding down the Ctrl key and pressing the X key will cut all highlighted text from the current field and place it on the clipboard.

Delete: The Delete key deletes the character to the right of the cursor. If the field is highlighted, all highlighted text is deleted.

Backspace: The Backspace key deletes the character to the left of the cursor. If the field is highlighted, all highlighted text is deleted.

Home: The Home key positions the cursor to the left of the first character in the field.

End: The End key positions the cursor to the right of the last character in the field.

Shift: Using the Shift key in conjunction with any key affecting cursor position will highlight all characters in the field between the starting cursor position and the ending cursor position. For example, if the cursor is at the end of a field and Shift+Home is typed, the cursor is repositioned to the left of the beginning of the field and the entire field is highlighted.

Ctrl: Using the Ctrl key in conjunction with any key affecting cursor position will move the cursor all the way to either end of the field, or the next space in the indicated direction. Using the Ctrl and Shift keys simultaneously not only moves the cursor, but also highlights all text in the field between the starting cursor position and the ending cursor position.

Space: When the cursor is at a check box, the Space bar toggles the check mark on and off.

Mouse Shortcuts in IRIS

Unless otherwise specified, mouse clicks refer to the left mouse button. Internet Explorer automatically positions the cursor in the field specified by the Web page. To position the cursor, Click the mouse in the desired field.

Clicking in a field: Clicking in a field will place the cursor in that position.

Double Clicking in a field: When a field contains one character string with no spaces, you may highlight the entire field by double clicking anywhere in the field. If the field contains words separated by spaces, double clicking highlights only the word at which the cursor is pointing.

Triple Clicking in a field: When a field contains words separated by spaces, the entire field may be highlighted by triple clicking anywhere in the field.

Dragging the mouse: To highlight a field, hold down the left mouse button within a field and drag the mouse across the field.

Right Clicking in a field: When you right click in a field, IRIS displays a pop-up menu with various options. If any items are grayed out, there is either no text currently selected or no text is currently on the clipboard. The pop-up menu, or toolbar options are as follows:

Undo: Selecting the Undo option reverses your last action. Undo may be repeated several times.

Cut: Selecting the Cut option deletes all highlighted text in the current field and places it on the clipboard.

Copy: Selecting the Copy option duplicates all highlighted text in the current field on to the clipboard without changing the highlighted field.

Paste: Selecting the Paste option inserts the contents of the clipboard into the current field.

Delete: Selecting the Delete option removes the highlighted text without placing it on the clipboard.

Select All: Selecting the Select All option highlights all text in the current field.

Accessing IRIS

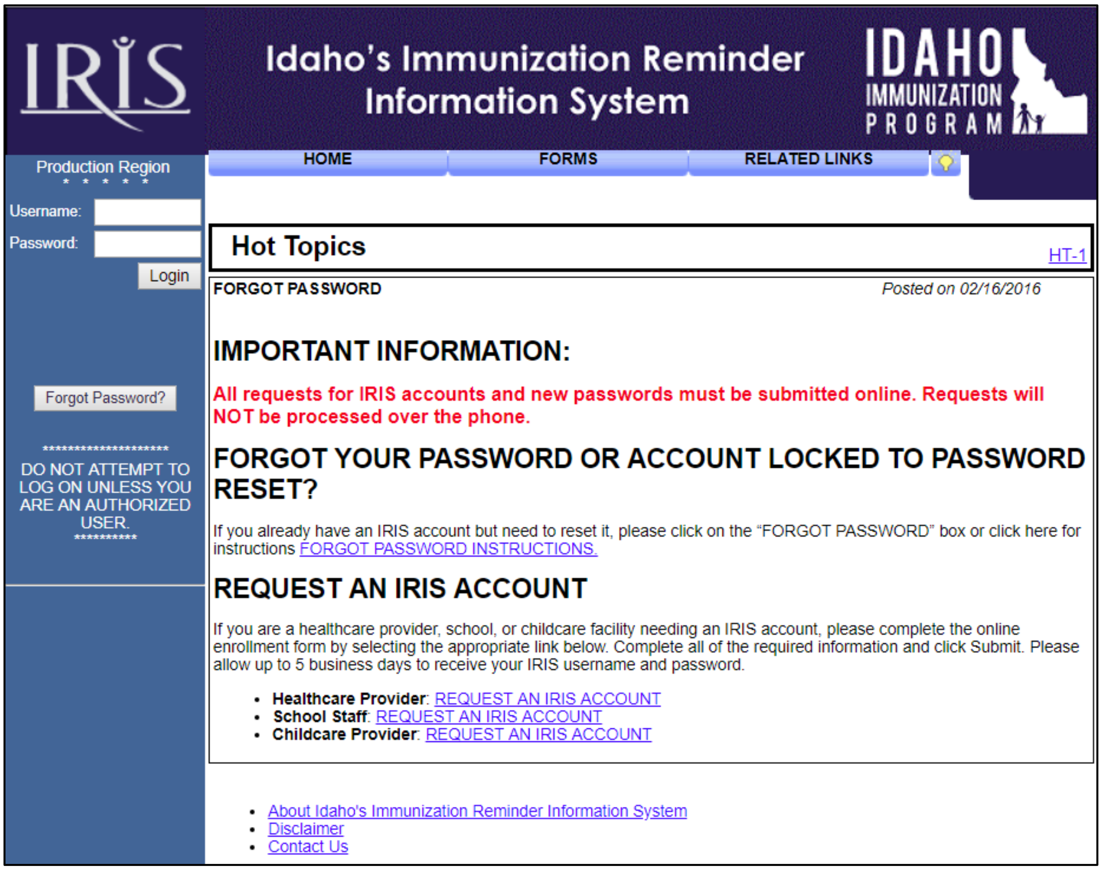
In this chapter:

Opening IRIS

To access the IRIS Web site, do the following:

1. Open your Internet browser. To open your browser, locate the browser icon on your computer's desktop (screen with program icons). For example, the browser icon for Microsoft® Internet Explorer looks like this: Once you have located the icon, double click on it with your left mouse button.
2. Type in the URL for the Idaho Immunization Reminder Information System: https://iris.dhw.idaho.gov/ in the address box at the top of the browser, or you can select File and Open.

Note: Depending on your browser, you may receive one or more security/certificate warnings before the browser will open the site. Accept any warnings regarding secure connections or security certificates. Internet Explorer will give you the option of turning off these warnings for future use.



Request IRIS Account

IRIS user accounts are managed by the IRIS Help Desk. New user accounts must be requested by completing an online account request form. A link to the forms is provided on the IRIS Login page shown. To request, do the following:

1. Proceed to the Login Page as shown in Opening IRIS section below.
2. In the **REQUEST AN ACCOUNT** section click on the link that applies to your access need.
3. Complete the required fields.
4. Press Submit.

The IRIS Help Desk will send your user account information if access to IRIS is granted.

You will be able to maintain your individual user account contact information, security questions and password in IRIS. This chapter providers instructions on how to maintain your account.

Note: Each person that will be accessing IRIS is **required** to have their own individual username and password. IRIS user accounts cannot be shared.

User Roles

IRIS is set up to accommodate a variety of user types. Each user will have access to certain features in the application based on the role that is assigned. The roles or levels of access for IRIS are hierarchical as follows:

1. **Medical Director or Equivalent**: This role is responsible for reviewing and submitting VFC Re-enrollment forms to the Idaho Immunization Program. For more information on VFC Re-enrollment, refer to Chapter 15 of this manual. They also can access all the functions of the Administrative User role described below.

2. **Administrative User:** This is the main contact for IRIS within the health care organization. The administrative user is responsible for the maintenance of all organization specific information including addresses and contact information and clinician list. The administrative user is also primarily responsible for inventory accountability including vaccine ordering, wastage, returns, and doses administered.   They also can access all the functions of the Standard User role described below.

3. **Standard User:** This is the primary user of IRIS. The standard user manages patient demographic information and immunizations history.   This role can also generate patient specific and organizational level reports. Examples of organizational level reports in IRIS include reminder/recall reports, AFIX Assessment reports and Ad Hoc reports.

4. **Pharmacist User:** This role may be assigned to a pharmacist authorized to administer immunizations. This role provides access to similar functionality as a Standard User in IRIS.

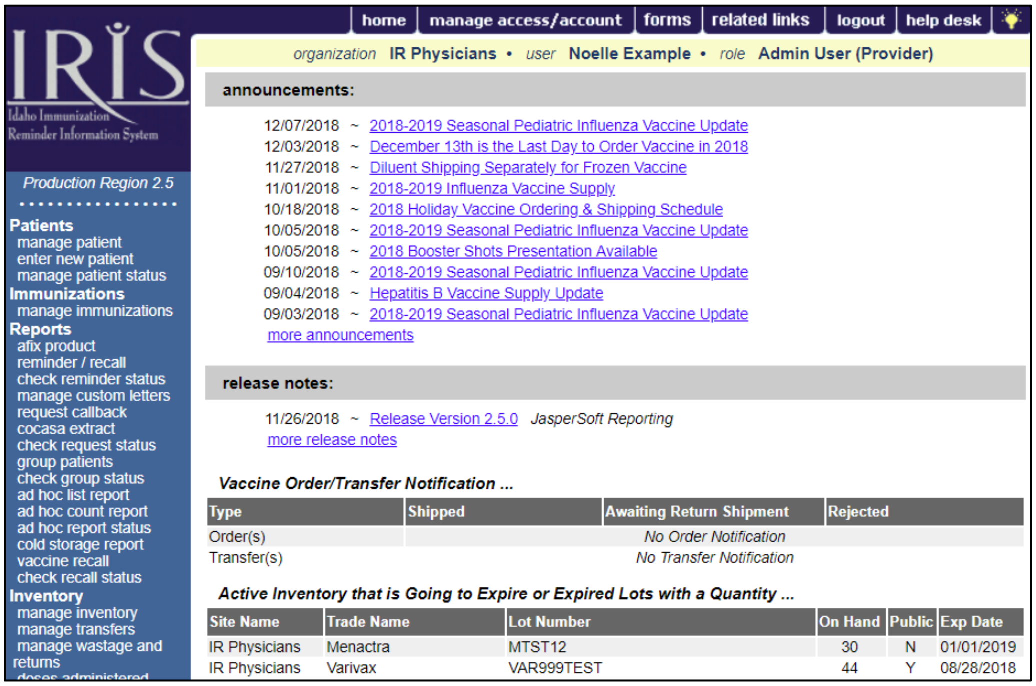
5. **School or Childcare User:** This role has read only access to view students in IRIS.   The school user can run school reports and assess the students' eligibility for school admission/childcare attendance. For more information on School/Childcare Users, refer to Chapter 14 of this manual.

5. **Reports Only User**: This role has read only access to view patient immunization histories and includes the capability to run reports. The Reports Only role is appropriate for individuals within an organization that do not need full access to IRIS.

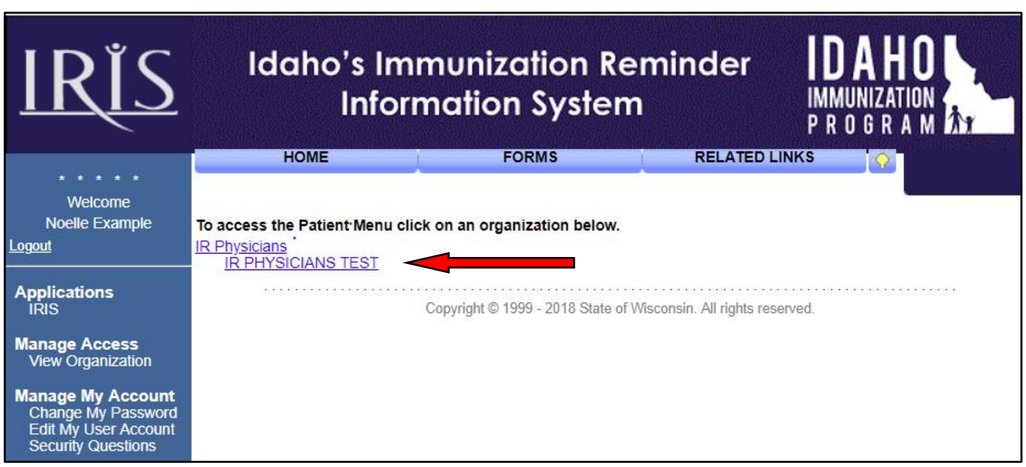
Login to IRIS

1. Once an IRIS user account is requested and access is given, you may Login to IRIS
2. On the login page enter your Username and Password, and click the Login button.

User accounts set up with access to one organization will be taken to the IRIS Home page shown below.



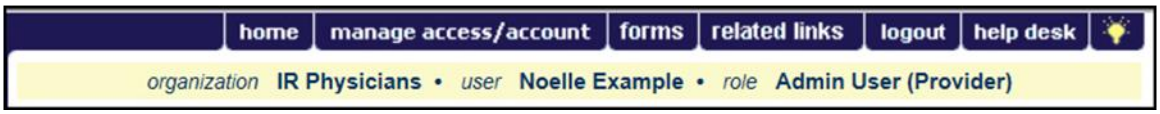
User accounts set up with access to more than one organization will be taken to the Select Organization screen within the portal shown below. To Login to IRIS, select an organization name from the list.



Post Login

Once in IRIS, you may access the **Select Organization** screen in the portal to switch organizations or manage your user account.

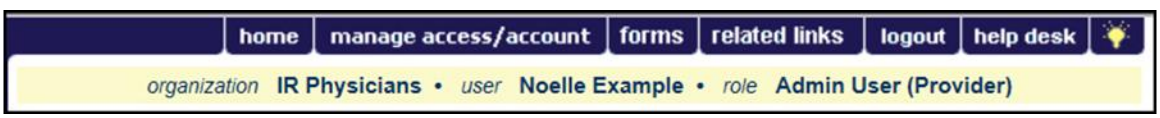
To do this, simply click the Manage Access/Account link at the top of the screen in IRIS.



For more information on the functions available on the Select Organization screen, refer to the Managing Users and Organizations and Managing My Account chapters of this manual (Chapters 6 and 7 respectively).

Exiting IRIS

To exit from the IRIS application, press the logout button on the IRIS menu bar at the top of the screen. You may logout this way from most screens within IRIS.

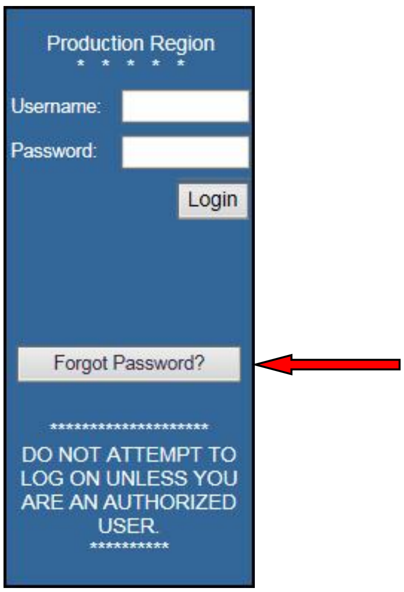


Within the Select Organization Screen the logout hyperlink can be found within menu groups on the left, as seen in the screenshot below.

Forgot Password?

IRIS now allows users to reset their own password without the assistance if the IRIS Help Desk. In order to reset your own password, you will need to have an email address and established security questions on your user account.   Refer to Chapter 7 Managing My Account for information on entering an email address and establishing security questions for your user account.

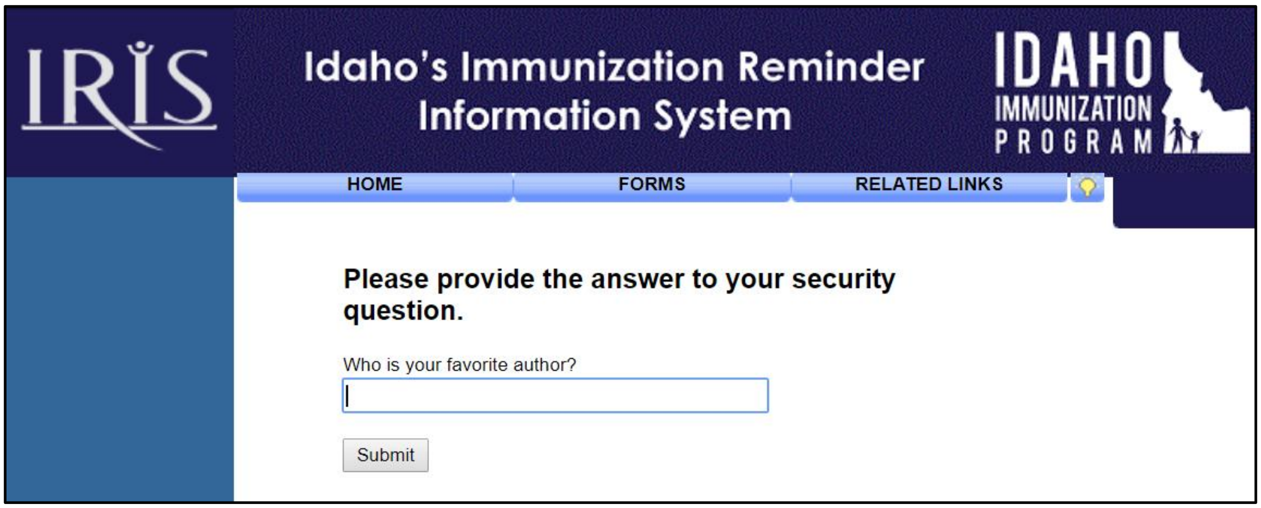
1. If you need to reset your password, click the **'Forgot Password**?' button on the IRIS login page.



2. Enter your Username, and Email Address associated with your user account.

3. Click the 'Submit' button.

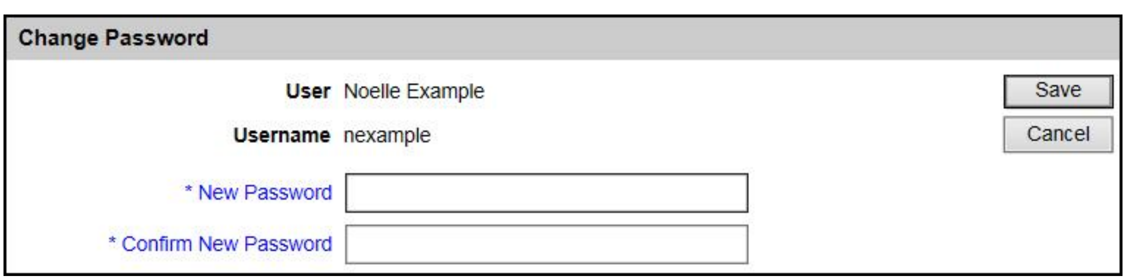
4. A message, '**A password reset link has been sent to the email address associated with this account and will be active for 24 hours**.' will display when the request has been submitted.
5. Open the email associated with the user account. The email will include a link to reset your password. The link will be active for 24 hours. To reset your password, click the link in the email.
6. The link will take you to a screen in IRIS where one of your security questions will be displayed.



7. Enter the answer to the security question. Answers are not case-sensitive.
8. Click the 'Submit' button.

You will have three attempts to correctly answer security questions. Your account and password reset will be locked after the third invalid attempt.

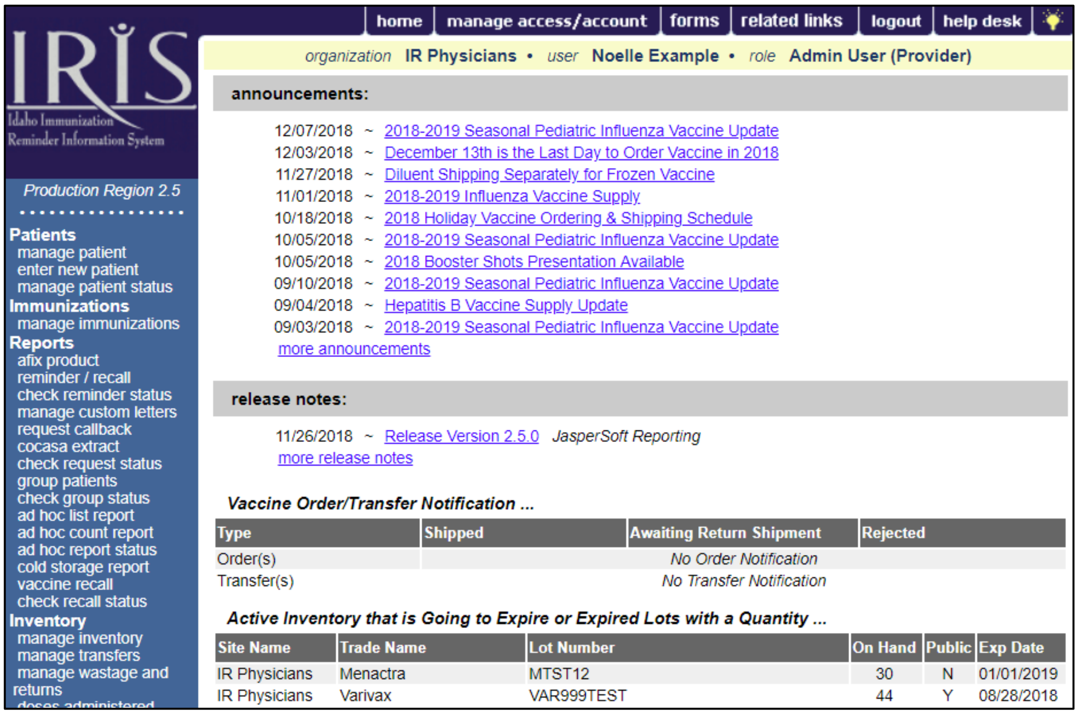
9. After correctly answering your security question, the Change My Password screen will display. Type your new password, then confirm your new password.



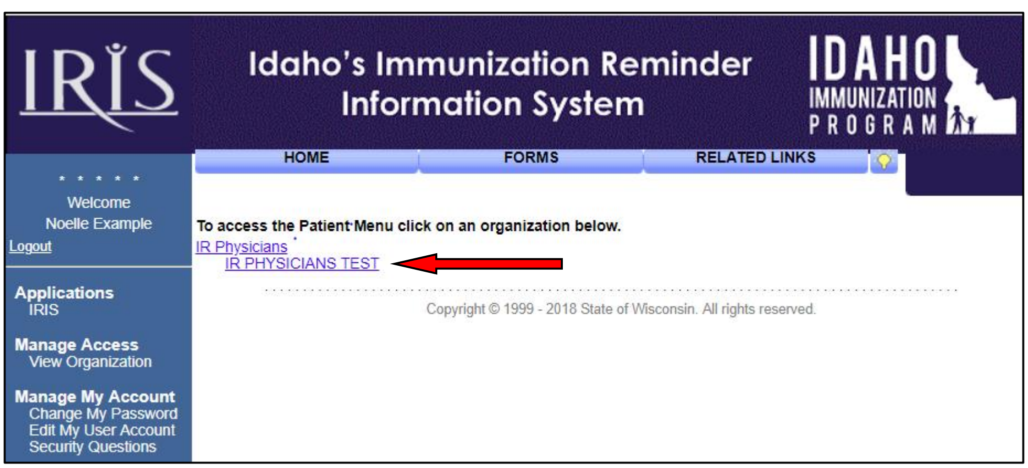
10. Click the 'Save' button. To login to IRIS, click the IRIS link under Applications menu group o on the left menu

11. The page that will show next is determined by how your account is set up.

    User accounts set up with access to a single organization will be taken to the IRIS Home page for that organization, shown below.



User accounts set up with access to more than one organization will be taken to the Select Organization screen in the portal shown below. To Login to IRIS, select an organization name from the list.



IRIS Security

For security reasons, your session with IRIS will time out after designated lengths of time. Data that was entered and saved prior to the time out will not be lost.

IRIS will automatically log out a user after 30 minutes of inactivity. At this point, you must re-login to IRIS. Additional IRIS Security items include:

- Your account will be disabled after 60 days of inactivity.
- Your account will be disabled after 3 unsuccessful login attempts. You can use the Forgot Password feature to request a password reset. Your account must have an email address and established security questions and answers to use the automated password reset.
- Your account will be locked after 3 unsuccessful attempts to answer a security challenge question during an automated password reset request.
- If your account becomes locked, you must contact the IRIS help desk at iris@dhw.idaho.gov to have it reset.
- A new password is required every 90 days.

Note: Each person that will be accessing IRIS is required to have their own individual username and password. IRIS user accounts cannot be shared.

Home Page

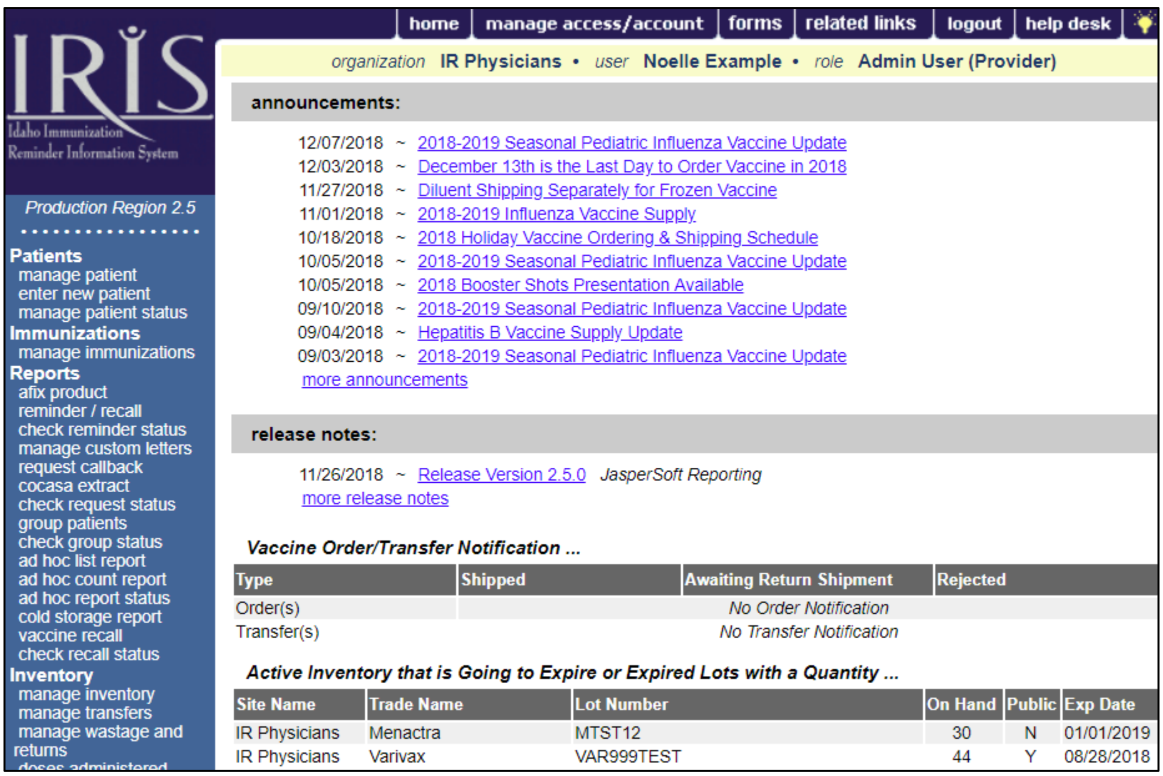
In this chapter:

Menu Bar
Menu Panel
Announcements
Release Notes
Inventory Alerts

To access the IRIS home page, please follow the instructions outlined in the “Opening IRIS” section of Chapter 3 of the IRIS User Manual.

Note: All IRIS end-users must obtain a unique Username and Password before gaining access to the IRIS application. The Username is used to establish each user’s IRIS account. A link to the online user account request form is located on the IRIS Login page. Refer to Chapter 3 Accessing IRIS for information on requesting a user account.

The home page of IRIS is divided into several sections. It may be necessary to use the vertical scroll bar to the right of the IRIS screen to view all sections of the home page.



Menu Bar

At the top of the screen, you have several menu options. These menu options will appear on every screen within IRIS. The options available are the following:

Home: Clicking this menu option will return you to the IRIS home page from anywhere in the application.

Manage Access/Account: Access is managed by the IRIS Help Desk. New user account requests should follow the instructions provided on the IRIS Home page. Clicking this menu option will bring you to the Manage Access/Account page, where you may view organization information or manage your user account contact information, password or security questions. Refer to the Managing My Account chapter of this manual for more information on these functions (i.e., Chapter 5).

Forms: Clicking on this menu option shows a list of hyperlinks for printing blank forms and supporting documentation, such as the user manual, data exchange specifications and a blank vaccine administration record.

Tip: Looking for additional Forms? The Related Links list includes links to current VFC Provider Forms posted in the Idaho Immunization Program site.

Related Links: Clicking on this menu option will display links to other web sites containing information of interest to the immunization community and provider organizations. The related links list includes links to current VFC Provider Forms posted in the Idaho Immunization Program site.

Logout: Clicking on this menu option will log you out of your current IRIS session. You may logout from any screen within IRIS.

Help Desk: Clicking on the Help Desk menu option will direct you to the IRIS Help Desk contact information.

Online Help: Clicking the light bulb, in the right corner of the screen, brings up page-specific help. Refer to the Appendix of this manual for more information on the online help.

Directly below the menu bar is a row of information highlighted in yellow. This row contains your organization's name, your first and last name, and your role within IRIS for your organization. If your user name information is incorrect, refer to Chapter 7, Managing My Account. The Administrative User should refer to Chapter 6, Managing Users and Organizations for instructions on revising their organization's and user's information. To alter access or user role the IRIS Help Desk will need to be contacted, (208) 334-5995.

Menu Panel

The menu panel is shaded in blue and appears on the left of all screens within IRIS.

Menu Selections

These links, which include functions under Patients, Immunizations, Reports, Maintenance, and others, are used to navigate the IRIS application. To perform a particular function in IRIS, click on the appropriate link under the Menu Panel. Your role will determine your access to these functions.

Announcements

The center portion of the home page, which has a white background, contains important information on enhancements and maintenance relating to IRIS and immunization related material. Recent announcements that have not been viewed will have "New" highlighted in yellow alongside them. Once you have viewed the announcement and returned to the home page, the "New" icon will disappear. To view a full announcement, do the following:

1. Click on the underlined announcement title.
2. The IRIS Announcement screen will display, giving full details and the posting date of the selected title.
3. Click on the Return to Main Page link to return to the home page.

Release Notes

Release Notes are found under the Announcements section of the home page. This section contains information regarding new releases of IRIS and features included in that release. Release notes may be viewed in the same manner as Announcements.

Inventory Alerts

The inventory alerts section will appear on the IRIS home page under the Release Notes section. Refer to the Inventory Alerts section within Chapter 9 of this manual for more information.

The inventory alerts section of the home page consists of four tables.

The top table *“Vaccine Order/Transfer Notification”* lists orders/transfers that have been shipped, orders/transfers that are awaiting return shipment, and orders/transfers that have been rejected.

The next table, *“Active Inventory That is Going to Expire or Expired Lots with a Quantity”*, lists vaccines that are going to expire within the configured timeframe (see Chapter 9, Managing Inventory) as well as lots which have expired and still have a quantity.

The next table, *“Inventory that is Running Low by Vaccine Group”*, lists inventory that is nearly depleted by vaccine group. This table indicates whether the vaccine is public (VFC vaccine) inventory or Private inventory.

The bottom table *“Inventory that is Running Low by Trade Name”* lists inventory that is nearly depleted by trade name. This table indicates whether the vaccine is public (VFC vaccine) inventory or Private inventory

Managing My Account

In this chapter:

Manage Access/Account

IRIS allows all users to manage their own user account information. Uses can manage their account by selecting the manage access/account link in the top header menu anywhere in IRIS.

All users will have access to the following under Manage My Account:

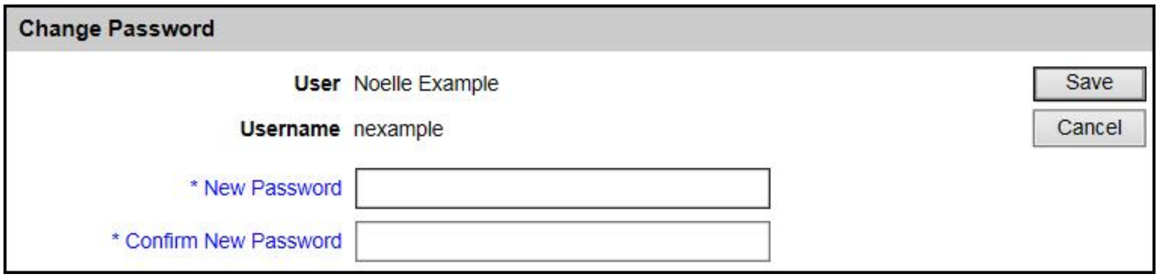
- Change My Password
- Edit My User Account
- Security Questions

Note: Your user account must have an email address and established security questions/answers to request an automated password reset using the Forgot Password button on the IRIS Login page.

Change My Password

You can change your password using the Change My Password link. Users will be prompted to change passwords upon initial login and then every 90 days. Users will also need to change their password after a password reset is requested.

1. Under the **Manage My Account** section of the menu panel, click on **Change My Password**.



2. Enter a new password and confirm new password.

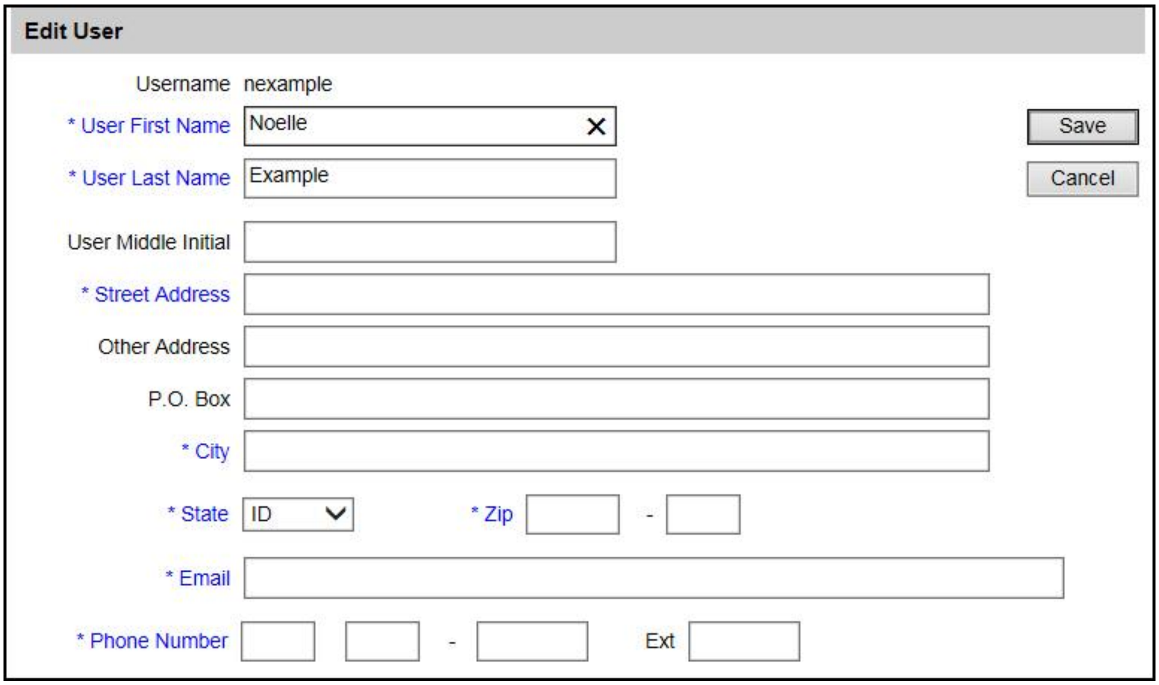
Note: Passwords must meet the following criteria.

- At least 8 characters in length
- Contain 1 upper case letter
- Contain 1 lower case letter
- Include 1 number
- Cannot match previous 5 passwords

Edit My User Account

You can update your user contact information including address, email and phone number using the Edit My User Account link.

1. Under the **Manage My Account** section of the menu panel, click on **Edit My User Account**. This will invoke the Edit User screen as shown on the next page.



2. Edit your first name, last name and email address in the appropriate fields. Administrators must enter street address, city, state, zip and phone number.
   - Email address must be unique to that user. An error will display if the email address has been assigned to another user.

3. Press **Save**. You will be routed to the Select Organization page of the portal.

Note: Required fields are displayed in *blue. The first name, last name and email fields are required fields for all users on the Edit User screen. If you are an Administrative User, Address and Phone Number fields are also required. You may edit these fields, but do not remove the information from them.

Establish Security Questions

Each IRIS user is required to establish three security questions and answers which are used when requesting an automated password reset using the **Forgot Password** button on the IRIS Login page. New users will be required to establish their questions after their initial login to the system.

1. Under the **Manage My Account** section of the menu panel, click on **Security Questions**. This will invoke the Establish Security Questions and Responses screen.

2. To establish security questions, select a question from the drop down list.

3. Enter your answer and confirm your answer for each question.

4. Repeat steps to create three security question and answers for your account.

5. Select the ‘Submit’ button when you have finished.

6. If your user account does not contain an email address, a popup message will display: ‘Your email address has not been entered, please add your email address on the Edit My User Account screen.’ You will be routed to Edit My User Account screen. Refer to the Edit My User Account section of this chapter on how to update your email address.

Note: The answers are NOT case sensitive (i.e., it does not matter if you use upper or lower case characters).

The security questions MUST meet the following criteria:

- All Question, Answer and Confirmation Answer fields are required.
- Answers must be five or more characters
- Answers cannot be your IRIS Username
- Answers cannot match the other chosen answers
- Confirmation Answer must match Answer
- Be something that you will easily remember

VFC Re-Enrollment

In this chapter:

The Idaho Immunization Program (IIP) administers the federal Vaccines for Children (VFC) program in Idaho. Providers must be enrolled with the IIP to receive public funded vaccine. Providers are required to re-enroll in the VFC Program annually. The provider re-enrollment process will be conducted online through IRIS beginning in 2018.

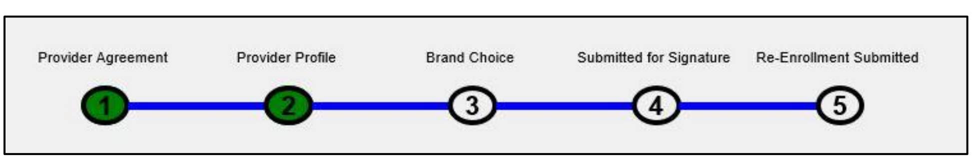
VFC Re-Enrollment Process

Your provider organization's IRIS Administrator and Medical Director or Equivalent users are responsible to review and update the Provider Agreement, Provider Profile, and Brand Choice online forms during the VFC Re-Enrollment period. All three forms must be reviewed and saved during each VFC Re-enrollment period. Once the information is saved, the Administer user must then submit the forms to their Medical Director or Equivalent for review and signature.

The Medical Director or Equivalent reviews the information in Provider Agreement, Provider Profile, and Brand Choice in IRIS and then enters an online signature indicating the information entered is accurate and the staff will comply with the VFC Program provider agreement conditions. The complete VFC Re-enrollment packet is then generated (PDF). The Medical Director or Equivalent must submit the packet to the IIP to complete the VFC Re-Enrollment process. The IIP staff, Medical Director or Equivalent, Primary Vaccine Coordinator and Backup Vaccine Coordinator will receive an automated email with an attached copy of the full VFC Re-enrollment packet PDF. The PDF can be downloaded and saved or printed for your files.

Note: Some organization's email servers or specific user accounts are set to block emails sent from mail servers. You may need to work with your organization's email administrator to allow emails from the HelpDesk - IRIS IRIS@dhw.idaho.gov. The instructions for the Medical Director or Equivalent sent in the email are also showed in the Review and Sign section of this page.

The VFC Re-Enrollment process flow is shown visually using the progress bar at top of each page. The below image shows that the provider agreement (1) and provider profile (2) the brand choice (3) are completed and saved. The forms are then submitted to Medical Director or Equivalent for review (4). The Medical Director or Equivalent user then reviews, signs and submits VFC Re-Enrollment to IIP (5).



Provider Agreement

Provider Agreement Text (Page 1)

The first page of the provider agreement displays the VFC Re-Enrollment agreement conditions. The provider agreement can be accessed using the left navigation menu.

1. Click on **provider agreement** under the Vfc Re-Enrollment menu group on the menu panel. The Provider Agreement, State Vaccine-Eligible Children, and Birth Dose of Hepatitis B Vaccine conditions will be displayed.
2. Click **Next** once the conditions are read and understood.

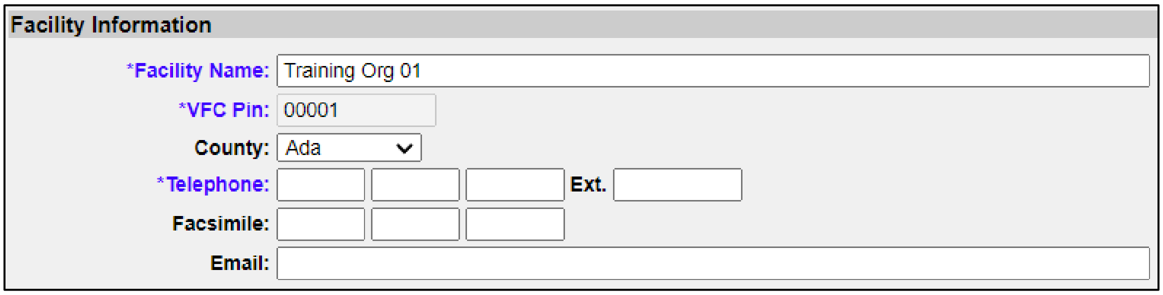
Provider Agreement VFC Enrollment (Page 2)

The second page of provider agreement is the provider enrollment form. The form captures the information about Facility, Physical Address, Mailing Address, Vaccine Delivery Address, Medical Director or Equivalent, Primary Vaccine Coordinator, Backup Vaccine Coordinator contacts and Providers Practicing at this Facility.

Note: You will not be able to enroll if you organization is VFC Inactive or Noncompliant. You will see the following error message on the top of the Provider Enrollment form. **Currently, your organization is not participating in the Idaho Immunization Program. For additional details, please call (208) 334-6524 or email IIP@dhw.idaho.gov.**

Facility Information

The facility information such as name, VFC PIN and general facility contact numbers.


Facility Information

*Facility Name: Training Org 01

*VFC Pin: 00001

County: Ada

*Telephone: Ext.

Facsimile:

Email:

Facility Name: Facility Name is a required field. Name of the facility. Pre-populated with the existing facility name.

VFC PIN: VFC PIN is a required field. Vaccine for Children (VFC) Identification assigned to the facility. This is a read only field. Pre-populated with existing VFC PIN.

County: County where the facility is located. Drop down lists all Idaho counties. Pre-populated with existing county when available.

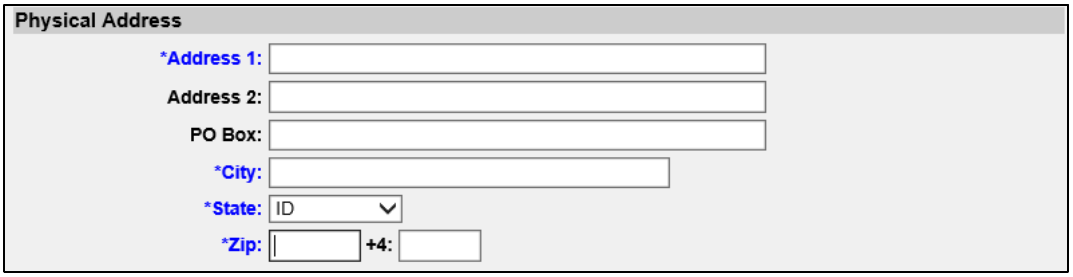
Telephone: Telephone is a required field. Primary phone number of the facility. Pre-populated with existing Phone when available.

Facsimile: Facsimile is an optional field. Primary fax number of the facility. Pre-populated with existing Facsimile when available.

Email: Primary e-mail of the facility. Pre-populated with existing e-mail if available.

Physical Address

The physical address/location of the facility.



Address Line 1: Address Line 1 is a required field. Use this line for the street address.

Address Line 2: Address Line 2. Use this line to include additional address information such as office number, floor etc.

PO BOX: Post Office Box for mailings.

City: City is a required field.

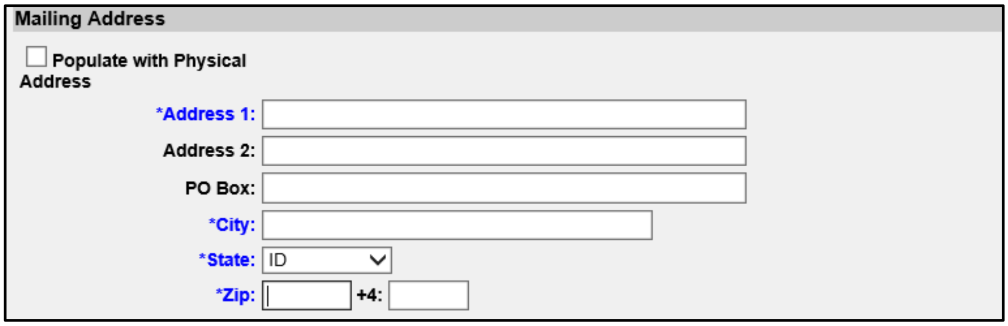
State: State is a required field. Drop down to select from list of State abbreviations for United States and US Territories.

Zip: Zip is a required Field. Five digit US Postal Zip code.

+4: Four digit Zip extension.

Mailing Address

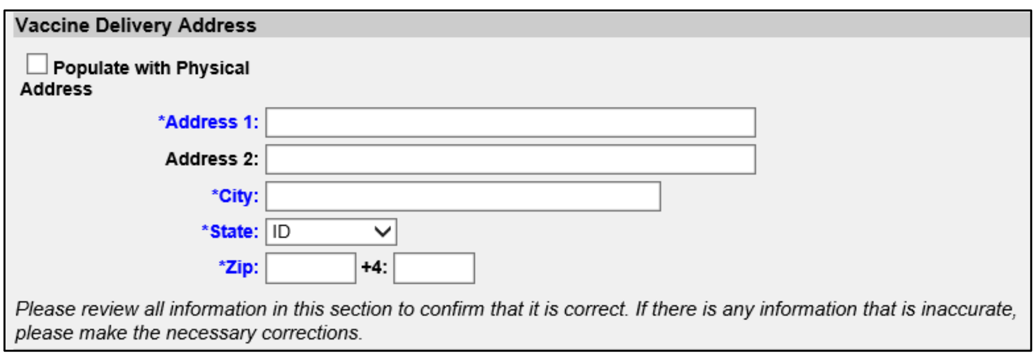
The mailing address of the facility.



- The fields listed are same as the physical address listed above.
- **Populate with Physical Address:** Checking this check box will overwrite the mailing address with Physical address fields. Use this feature if physical and vaccine deliver addresses are the same.

Vaccine Delivery Address

The vaccine delivery address of the facility.

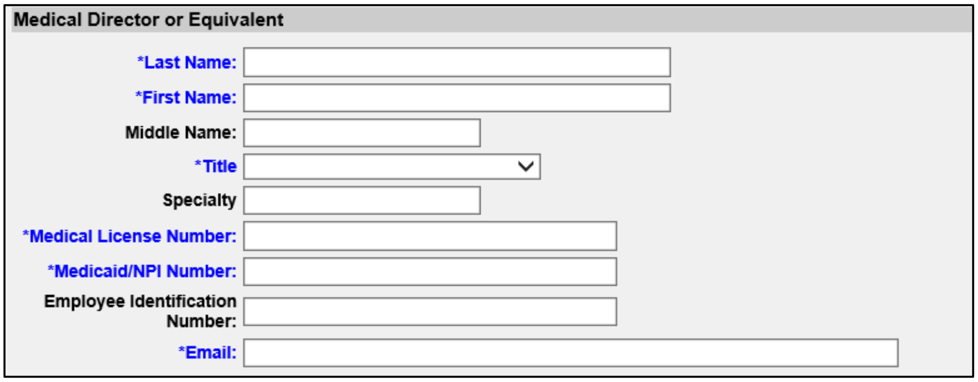


- The fields list are same as the physical address listed above.
- **Populate with Physical Address:** Checking this check box will overwrite the vaccine delivery address with Physical address fields. Use this feature if physical and vaccine deliver addresses are the same.

Note: The vaccine delivery address does not have a PO BOX and this value will not be copied from physical address when *Populate with Physical Address* check box is checked.

Medical Director or Equivalent

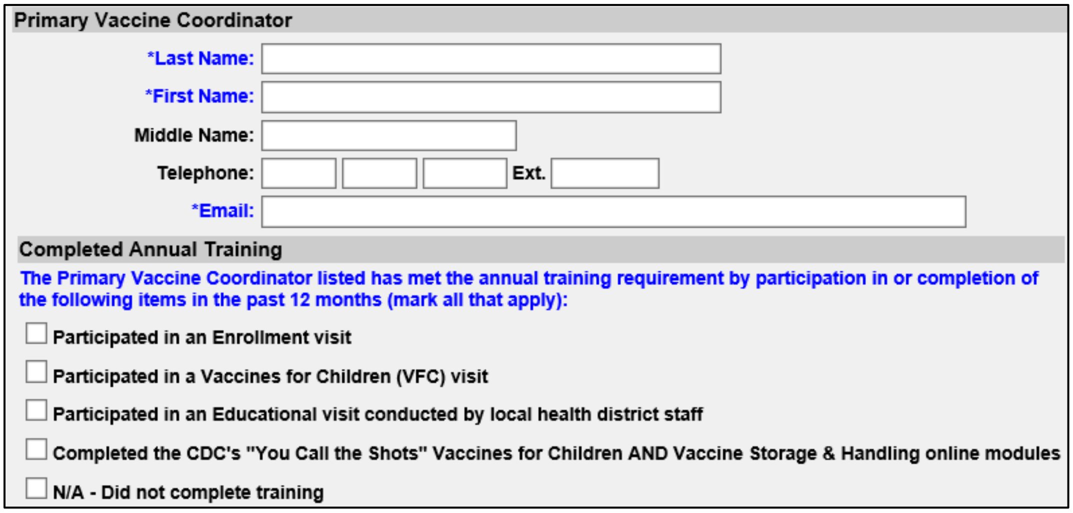
The contact details of the medical director or equivalent of the facility.



Last Name:	Last Name is a required Field. Last Name of the Medical Director or Equivalent.
First Name:	First Name is a required field. First Name of the Medical Director or Equivalent.
Middle Name:	Middle Name of the Medical Director or Equivalent.
Title:	Title is a required field. Select the Title/degree of the Medical Director or Equivalent from the drop down list.
Specialty:	Medical specialty of the Medical Director or Equivalent.
Medical License Number:	Medical License Number is required. Idaho Medical License number of the Medical Director or Equivalent.
Medicaid/NPI Number:	Medicaid/NPI Number is a required field. Medicaid/NPI number of the Medical Director or Equivalent.
Employee Identification Number:	Employee Identification Number of the Medical Director or Equivalent.
Email:	Email is a required field. E-Mail of the Medical Director or Equivalent. Maximum field length 40 characters. A copy of the final VFC enrollment packet submitted to IIP will be sent to this email address.

Primary Vaccine Coordinator

The contact details of the Primary Vaccine Coordinator of the facility and the annual trainings completed.



Primary Vaccine Coordinator

*Last Name:

*First Name:

Middle Name:

Telephone: Ext.

*Email:

Completed Annual Training

The Primary Vaccine Coordinator listed has met the annual training requirement by participation in or completion of the following items in the past 12 months (mark all that apply):

- [ ] Participated in an Enrollment visit
- [ ] Participated in a Vaccines for Children (VFC) visit
- [ ] Participated in an Educational visit conducted by local health district staff
- [ ] Completed the CDC's "You Call the Shots" Vaccines for Children AND Vaccine Storage & Handling online modules
- [ ] N/A - Did not complete training

Last Name: Last Name is a required Field. Last Name of the Primary Vaccine Coordinator.

First Name: First Name is a required field. First Name of the Primary Vaccine Coordinator.

Middle Name: Middle Name of the Primary Vaccine Coordinator.

Telephone: Telephone is a required field. Primary phone number of the Primary Vaccine Coordinator.

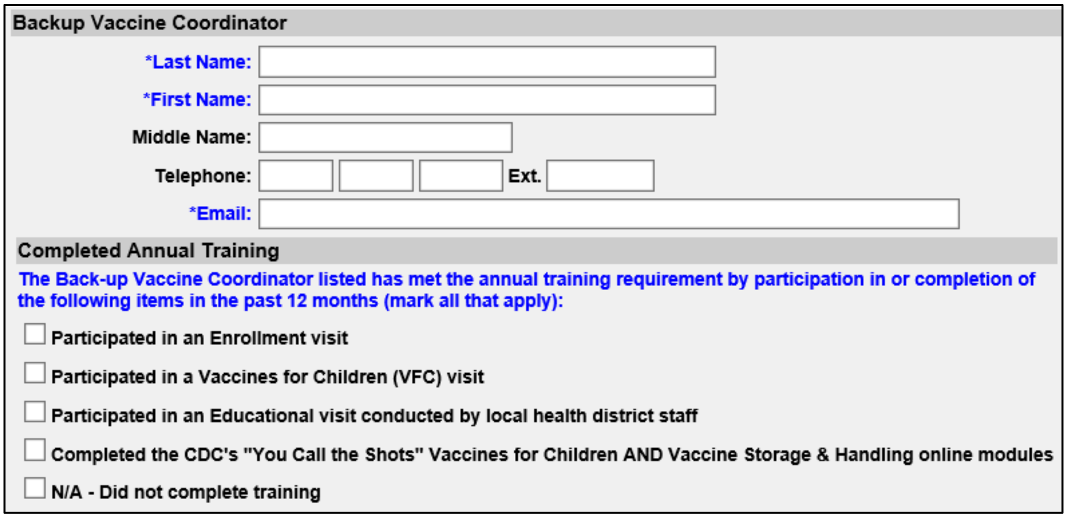
Email: Email is a required field. Maximum field length 40 characters. Primary e-mail address of the Primary Vaccine Coordinator.

- **Annual Trainings:** Select checkbox for each of the listed annual trainings completed by the Primary Vaccine Coordinator in the past year. Select N/A - Did not complete training if no training was completed.

Note: The training selections made during the previous year's VFC re-enrollment will be cleared out to make sure that the annual trainings are selected for the current enrollment.

Backup Vaccine Coordinator

The contact details of the Backup Vaccine Coordinator of the facility and the annual trainings completed.


Backup Vaccine Coordinator

*Last Name:

*First Name:

Middle Name:

Telephone: Ext.

*Email:

Completed Annual Training

The Back-up Vaccine Coordinator listed has met the annual training requirement by participation in or completion of the following items in the past 12 months (mark all that apply):

- ☐ Participated in an Enrollment visit
- ☐ Participated in a Vaccines for Children (VFC) visit
- ☐ Participated in an Educational visit conducted by local health district staff
- ☐ Completed the CDC's "You Call the Shots" Vaccines for Children AND Vaccine Storage & Handling online modules
- ☐ N/A - Did not complete training

Last Name: Last Name is a required Field. Last Name of the Backup Vaccine Coordinator.

First Name: First Name is a required field. First Name of the Backup Vaccine Coordinator.

Middle Name: Middle Name of the Backup Vaccine Coordinator.

Telephone: Telephone is a required field. Backup phone number of the Backup Vaccine Coordinator.

Email: Email is a required field. Maximum field length 40 characters. Backup e-mail address of the Backup Vaccine Coordinator.

- **Annual Trainings:** Select checkbox for each of the listed annual trainings completed by the Backup Vaccine Coordinator in the past year. Select N/A - Did not complete training if no training was completed.

Note: The training selections made during the previous year's VFC re-enrollment will be cleared out to make sure that the annual trainings are selected for the current enrollment.

Polices and Guidelines

The IIP policies and guidelines that needs to be read and accepted.

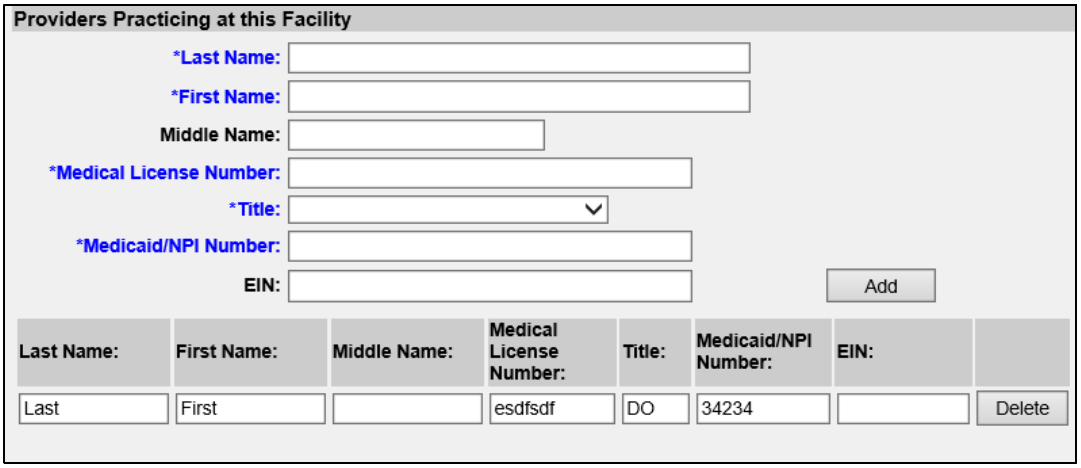
> **Polices and Guidelines**
>
> ☐ **By checking the box to the left, I certify on behalf of myself and all immunization providers and staff at this facility, I have read and agree to comply with the current <u>Idaho Immunization Program (IIP) Provider Policies and Guidelines.</u>**
>
> **In addition, I understand the current Provider Policies and Guidelines supersedes any prior IIP policies and guidelines. I further understand that content and forms referenced may be updated or modified at any time. Updates and revisions will be communicated to my office through announcements in Idaho Immunization Reminder Information System (IRIS) and/or Important Notices published by the IIP and/or direct mail, email, and/or fax.**

- The policies and guidelines check box should be checked before the provider agreement can be completed.
- The current Idaho Immunization Program (IIP) Provider Policies and Guidelines can be viewed by clicking the underlined hyperlink provided in this section.

Note: The Policies and Guidelines check box will be cleared out to make sure that the Policies and Guidelines are read and accepted for the current enrollment.

Providers Practicing at this Facility

A list of providers practicing at the facility.



Providers Practicing at this Facility

*Last Name:

*First Name:

Middle Name:

*Medical License Number:

*Title:

*Medicaid/NPI Number:

EIN:

Add

Last Name:	First Name:	Middle Name:	Medical License Number:	Title:	Medicaid/NPI Number:	EIN:	
Last	First		esdfsdf	DO	34234		Delete

Last Name: Last Name is a required Field. Last Name of the provider.

First Name: First Name is a required field. First Name of the provider

Middle Name: Middle Name of the provider.

Medical License Number: Medical License Number is required. Idaho Medical License number of the provider

Title: Title is a required field. Select the Title/degree of the provider from the drop down list.

Medicaid/NPI Number: Medicaid/NPI Number is a required field. Medicaid/NPI number of the provider.

EIN: Employee Identification Number of the provider.

- **Add:** Clicking Add will add a new contact to the existing list of providers practicing at the facility. A new blank row will be added in the contacts table displayed below the Add button.

- **Delete:** Clicking Delete will remove an existing provider practicing at the facility. The deleted row will be removed from the contacts table displayed below the Add button.

Saving VFC Enrollment Information

Save: When pressed, the **Save** command button at the bottom of the screen will save all information fields within the Facility Information, Physical Address, Mailing Address, Vaccine Delivery Address, Medical Director or Equivalent, Primary Vaccine Coordinator, Backup Vaccine Coordinator, Policies and Guidelines and Providers Practicing at this Facility sections of the form to the IRIS database. Once the provider enrollment data is saved, the message "Saved successfully." will display.

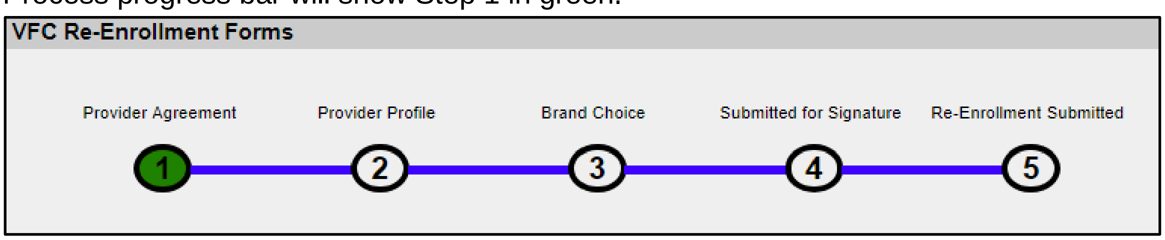
If the VFC enrollment information is being updated during the enrollment period, another message will display if additional steps are needed to complete enrollment.

"The re-enrollment is not complete. Please review and save the Provider Agreement, Provider Profile, and Brand Choice. Once all three forms have been saved, submit the information to the medical director or equivalent for signature."

If the Brand Choice is being updated during the enrollment period, the following message will display if all three required enrollment forms have been saved. You can submit the forms for Medical Director or Equivalent review and signature to complete Step 4. The Submit button will display on the bottom of the form. Refer to the Submit button definition on the next page.

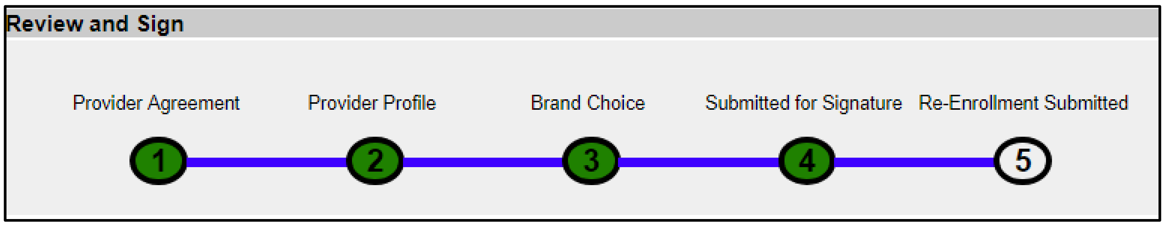
Provider Agreement, Provider Profile and Brand Choice have all been saved successfully for VFC Re-enrollment. Click Submit to notify the medical director the forms are ready for review and signature.

Once the VFC Enrollment form is saved during the VFC Re-enrollment, the VFC Process progress bar will show Step 1 in green.



Submit: During enrollment period, the **Submit** button will not be displayed until the three forms: provider agreement, provider profile and brand choice are saved. Clicking submit will submit the enrollment to the medical director for review. An automated email notification will be sent to medical director or equivalent informing that the VFC Re-Enrollment forms need to be reviewed.

Once the forms are submitted to Medical Director Review and Signature, the VFC Process progress bar will show Step 4 in green.



Print: The **Print** button will be enabled after the Provider Enrollment is saved. Clicking Print will print the Provider Agreement form as a PDF file.

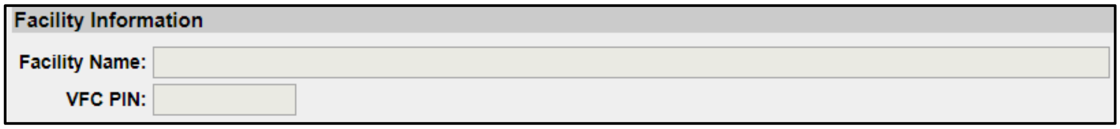
Cancel: When pressed, the **Cancel** command button will route the user to the Home pages. Any changes made on the Provider Agreement form are not saved.

Next: The **Next** button will be enabled after the Provider Enrollment is saved at least once during the VFC re-enrollment period. Clicking the Next button will take the user to Provider Profile.

Provider Profile

The provider profile page captures the organization's facility type, the vaccines offered, provider population, and the type of data used to determine the Provider Population details.

Facility Information



Facility Name: Name of the facility. This is a read only field. Pre-populated with the existing facility name.

VFC PIN: VFC PIN number of the facility. This is a read only field. Pre-populated with existing VFC PIN.

Provider Type

Provider Type: Type of the provider. Pre-populated with current provider type. Drop down lists all available IRIS Provider Types (Organizational Type).

Note: **Warning: Changing Provider Type will also clear all information saved previously in this page. Are you sure you want to Continue?** Changing the facility type will prompt the user to confirm the change as the facility type change will clear all the selections made under vaccines offered and type of data used to determine the Provider Population as well as the data in the Provider Population.

In addition, if the Provider type is changed to Birthing Hospital, the Enrollment Type will automatically change to Birth Dose Hospital to reflect the correct enrollment type.

Provider Specialty Section

Provider Type

Private Practice (e.g., family practice, pediatric, primary care)

If applicable, please indicate the specialty of the provider/practice (Select all that apply):
Note: Specialty definitions located on the Help screen for this page.

- ☐ Family Medicine
- ☐ Internal Medicine
- ☐ OB/GYN
- ☐ Pediatrics
- ☐ Preventive Medicine
- ☐ N/A
- ☐ Other :

Provider Specialty: Type of the specialty provider user can select one or more specialties from the available options with a checkbox.

Hospital/Healthcare System Section

Is this provider site part of a hospital/healthcare system?

- ☐ Yes
- ☐ No
- ☐ N/A or don't know

Hospital/Healthcare System?: User can select if the provider is part of hospital/healthcare system from the available options with a checkbox.

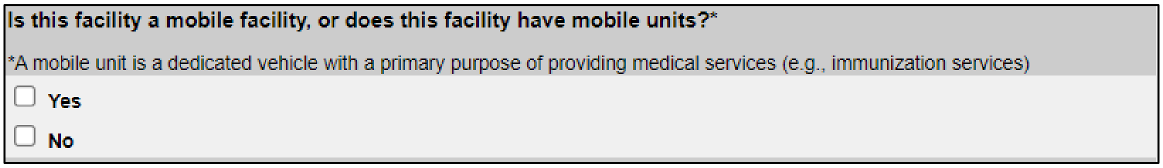
Facility Type Section

Facility Type (select one)

- ☐ Private Facility (privately funded entity; non-governmental)
- ☐ Public Facility (publicly funded or government entity)
- ☐ Combination (funded with public and private funds)

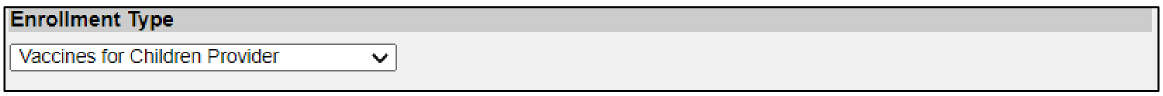
Facility Type Section: User can select if facility type is Private, Public or combinations options with a checkbox.

Mobile Facility Section



Mobile Facility: User can select if provider has mobile facility unity with a checkbox.

Enrollment Type



Enrollment Type: The type of enrollment is either **Vaccines for Children Provider** or **Birth Dose Hospital**. Vaccines for Children Provider is selected as the enrollment type by default and is used for all facilities that are not Birthing Hospitals. If the facility type is Birthing Hospital, the enrollment type will also be Birth Dose Hospital.

Vaccines Offered

This section captures the vaccines offered by the specialty providers.

Vaccines Offered (Select One):

☐ **All ACIP-recommended vaccines for children 0 through 18 years of age**

☐ **Select vaccines only (This option is only available for facilities designated as Specialty Providers by the Immunization Program)**

A "*Specialty Provider" is defined as a provider that only serves:

1. a defined population due to the practice specialty (e.g. OB/GYN; STD clinic; family planning)
2. a specific age group within the general population of children ages 0-18. Local health departments and pediatricians are not considered specialty providers. The Idaho Immunization Program (IIP) has the authority to designate VFC providers as specialty providers.

Select Vaccine(s) Offered by Specialty Provider

☐ DTaP	☐ Hepatitis A	☐ Hepatitis B
☐ HIB	☐ HPV	☐ Influenza
☐ Meningococcal Conjugate	☐ Meningococcal B	☐ MMR
☐ Pneumococcal Conjugate	☐ Pneumococcal Polysaccharide	☐ Polio
☐ Rotavirus	☐ Td	☐ Tdap
☐ Varicella	☐ Other, specify:	

- **All ACIP Recommended Vaccines:** Select this option if the provider is not a specialty provider. If this option is selected, the individual vaccines under "Select Vaccine(s) Offered by Specialty Provider" are not selectable.

- **Offers Select Vaccines (This option is only available for facilities designated as Specialty Providers by the VFC Program):** Select this option if the provider is a specialty provider. If this option is selected, at least one of the individual vaccines listed under "Select Vaccine(s) Offered by Specialty Provider" needs to be selected. If **Other, specify** is selected, indicate the vaccine offered in the free text box to the right.

Provider Population

This sections captures the number of patients under 19 years of age that had an immunization administered by your organization during the Date Range period.

You have two options to enter the population for your organization

- Edit the tables with the population counts from a source outside IRIS or
- Use IRIS immunization data to calculate the population counts

Provider Population

Provider population based on patients seen during the previous 12 months. Report the number of children by age group who received vaccinations at your facility. Count a child only <u>once</u> based on the age/eligibility categories at the last immunization visit, regardless of the number of visits made. The following tables detail the number of children who received VFC vaccine and non-VFC vaccine, by eligibility category.

VFC Vaccine Eligibility Categories	< 1 Year	1-6 Years	7-18 Years	Total
Medicaid	1	0	2	3
Uninsured	0	0	0	0
American Indian/Alaska Native	2	1	0	3
Underinsured FQHC/RHC[1]	0	0	0	0
Total VFC	3	1	2	6

Edit

Non-VFC Vaccine Eligibility Categories	< 1 Year	1-6 Years	7-18 Years	Total
Have Health Insurance (that covers vaccines)	1	0	2	3
Other Underinsured[2] (Non-Idaho resident)	0	2	0	2
Birth Dose (Hep B) - Other Insured at Birthing Hospitals Only[3]	0			0
Total Non-VFC	1	2	2	5
Total Patients (must equal sum of Total VFC + Total Non-VFC)	4	3	4	11

Edit

Begin Date Update

End Date

- **To Edit the tables with the population counts from a source outside IRIS:**

1. Click **Edit** button blow the first table and enter the unique patient counts for each VFC Eligible category. If a patient received multiple immunizations during the date range, they should be counted in the category based on their most recent immunization**.**
2. Click **Edit** button blow the second table and enter the unique patient counts for each Non-VFC Eligible categories. If a patient received multiple immunizations during the date range, they should be counted in the category based on their most recent immunization**.**
3. Enter the **Begin Date**: The begin date for the time period for which the provider population is/need to be displayed.

4. Enter the **End Date**: The end date for the time period for which the provider population is/need to be displayed**.** The date range cannot exceed a year.
5. The information is not saved until you click **Save** button at the bottom of the page.

Note: Not all cohorts may be editable for your facility. Only certain facility types can enter data for Underinsured FQHC/RHC and Birth Dose (HepB) Other Insured at Birthing Hospitals Only.

- Under the VFC population chart, the row data against 'Underinsured FQHC/RHC[1]' can only be edited when the when the Facility Type is one of the following:
  'Federally Qualified Health Center',
  'Private Practice (e.g., family practice, pediatric, primary care)',
  'Private Practice (e.g., family practice, pediatric, primary care) as agent for FQHC/RHC-deputized',
  'Public Health Department Clinic (state/local)',
  'Rural Health Clinic'.

- Under the Non-VFC population chart, the row data against 'Birth Dose (Hep B) - Other Insured at Birthing Hospitals Only[3]' can only be edited when the when the Facility Type is ' Federally Qualified Health Center'.

- **To Use IRIS immunization data to calculate the population counts**

1. Enter the **Begin Date**: The begin date for the time period for which the provider population is/need to be displayed.
2. Enter the **End Date**: The end date for the time period for which the provider population is/need to be displayed**.** The date range cannot exceed a year.
3. Click **Update button** will use IRIS immunization data entered by your organization to calculate the counts for each category.
4. The information is not saved until you click **Save** button at the bottom of the page.

Type of data used to determine provider population

This section captures the type of data that are used to determine the VFC and Non-VFC provider population in the above section.

Type of data used to determine provider population (choose all that apply): (Check at least one box)		
☐ Benchmarking	☐ Doses Administered	☐ Medicaid Claims
☐ Provider Encounter Data	☐ IIS (IRIS)	☐ Billing System
☐ Other (must describe):		

- Select one or more options on the type of data used to determine provider population. The options 'IIS (IRIS)' and 'Doses Administered' are selected by default. You may uncheck these options if other options were used to determine provider population.

Saving Provider Profile Information

Save: When pressed, the **Save** command button at the bottom of the screen will save all information fields within the Facility Information, Facility Type, Enrollment Type, Vaccines Offered and Select Vaccines(s) Offered by Specialty Provider, Provider Population, and Type of Data sections on the form to the IRIS database. Once the provider profile data is saved, the message "Saved successfully." will display.

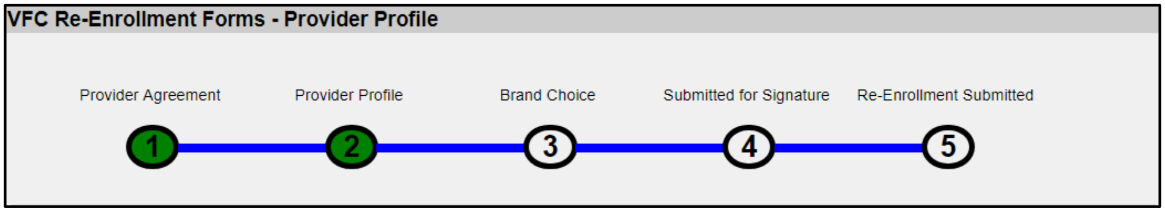
If the Provider Profile information is being updated during the enrollment period, another message will display if additional steps are needed to complete enrollment.

"The re-enrollment is not complete. Please review and save the Provider Agreement, Provider Profile, and Brand Choice. Once all three forms have been saved, submit the information to the medical director or equivalent for signature."

If the Provider Profile is being updated during the enrollment period, the following message will display if all three required enrollment forms have been saved. You can submit the forms for Medical Director or Equivalent review and signature to complete Step 4. The Submit button will display on the bottom of the form. Refer to the Submit button definition on the next page.

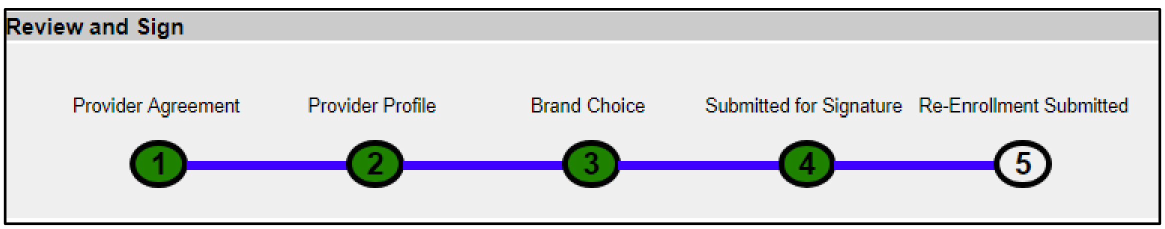
Provider Agreement, Provider Profile and Brand Choice have all been saved successfully for VFC Re-enrollment. Click Submit to notify the medical director the forms are ready for review and signature.

Once the Provider Profile form is saved during the VFC Re-enrollment, the VFC Process progress bar will show Step 2 in green.



Submit: During enrollment period, the **Submit** button will not be displayed until the three forms: provider agreement, provider profile and brand choice are saved. Clicking submit will submit the enrollment to the medical director for review. An automated email notification will be sent to medical director or equivalent informing that the VFC Re-Enrollment forms need to be reviewed.

Once the forms are submitted to Medical Director Review and Signature, the VFC Process progress bar will show Step 4 in green.



Print: The **Print** button will be enabled after the Provider Enrollment is saved. Clicking Print will print the Provider Agreement form as a PDF file.

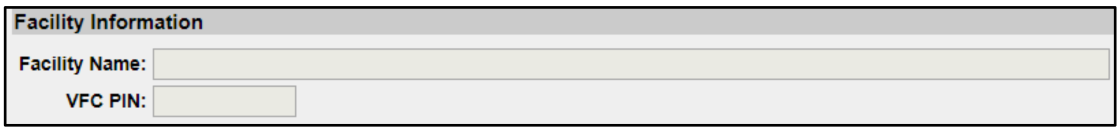
Cancel: When pressed, the **Cancel** command button will route the user to the Home pages. Any changes made on the Provider Agreement form are not saved.

Next: The **Next** button will be enabled after the Provider Enrollment is saved at least once during the VFC re-enrollment period. Clicking the Next button will take the user to Provider Profile.

Vaccine Brand Choice

The Provider Vaccine Brand Choice form captures the provider's preferred vaccine brand choices for ordering. Providers may choose which vaccine brands are preferred when multiple orderable vaccines are available. Vaccine brand choices are "locked in" for 6 month time periods starting January 1 and July 1 of each year.

Facility Information

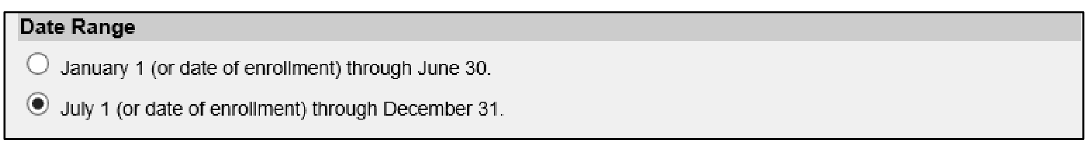


Facility Name: Name of the facility. This is a read only field. Pre-populated with the existing facility name.

VFC PIN: VFC PIN number of the facility. This is a read only field. Pre-populated with existing VFC PIN.

Date Range

VFC Providers can update their preferred vaccine brand choices for the <u>NEXT</u> brand choice period.



- The date range will default to the next brand choice period as users can only change brand selections for the future. From January to June, user would enter their preferred brand choices for the vaccine ordering period July to December. From July to December, user could enter their preferred brand choices for the vaccine ordering period January to July.
- Selecting the radio button current brand choice period to will allow view the current selection. The current brand choice is read only.

Brand Choice (select only one)

Brand Choice (select only one)		
Combination Vaccine		
☐ Pediarix® (DTaP-Hep B-IPV)	☐ Pentacel® (DTaP-IPV-Hib)	
DTAP (diphtheria, tetanus, acellular pertussis)		
☐ DAPTACEL®	☐ Infanrix®	
DTAP-IPV (diphtheria, tetanus, acellular pertussis, polio)		
☐ Kinrix®	☐ Quadracel™	
Hep A (hepatitis A)		
☐ Havrix®	☐ VAQTA®	
Hep B (hepatitis B)		
☐ Engerix B®	☐ RecombivaxHB®	
HIB (haemophilus influenza type b)		
☐ ActHIB®	☐ PedvaxHIB®	☐ Hiberix®
MCV4 (meningococcal conjugate)		
☐ Menveo®	☐ MenQuadfi™	
Men B (meningococcal b)		
☐ Bexsero®	☐ Trumenba®	☐ NA
MMR (measles, mumps, rubella)		
☐ M-M-R®II	☐ Priorix®	
PCV (pneumococcal conjugate)		
☐ Prevnar 13™	☐ VAXNEUVANCE™	
ROTA (rotavirus)		
☐ Rotarix®	☐ RotaTeq®	
Tdap (tetanus toxoid, reduced diphtheria toxoid and acellular pertussis)		
☐ Adacel®	☐ Boostrix®	

1. Select the preferred brand choice for each vaccine group. Each vaccine group should have a vaccine brand selected and only one brand can be selected for each vaccine group.

Completed and Submitted By

Completed and Submitted By	
*Name	
*Date	01/09/2019

- **Name:** The Full Name of the user who last submitted/Saved the Brand Choice. This field is read only and will be automatically populated.
- **Date:** The date the Brand Choice was last submitted/Saved. This field is read only and will be automatically populated.

Saving Provider Vaccine Brand Choice Information

Back: Clicking the **Back** button will take the user to Provider Profile form.

Save: When pressed, the **Save** command button at the bottom of the screen will save all information fields within the Date Range, Brand Choice and Complete and Submitted By section of the form to the IRIS database. Once the brand choice data is saved, the message "Saved successfully." will display.

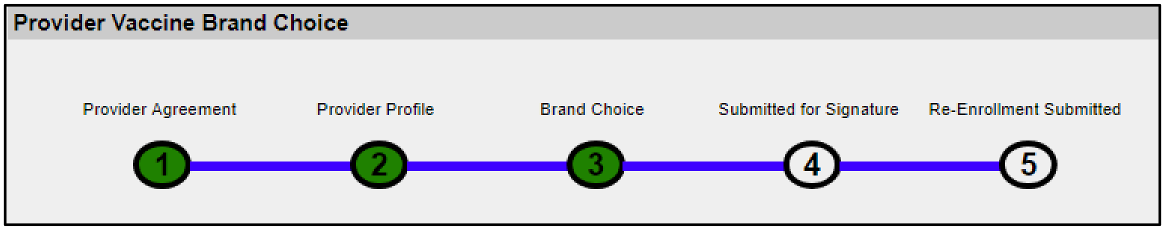
If the Brand Choice is being updated during the enrollment period, another message will display if additional steps are needed to complete enrollment.

"The re-enrollment is not complete. Please review and save the Provider Agreement, Provider Profile, and Brand Choice. Once all three forms have been saved, submit the information to the medical director or equivalent for signature."

If the Brand Choice is being updated during the enrollment period, the following message will display if all three required enrollment forms have been saved. You can submit the forms for Medical Director or Equivalent review and signature to complete Step 4. The Submit button will display on the bottom of the form. Refer to the Submit button definition on the next page.

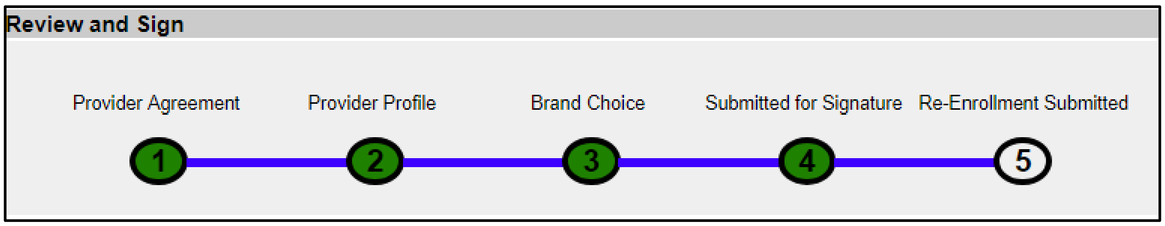
Provider Agreement, Provider Profile and Brand Choice have all been saved successfully for VFC Re-enrollment. Click Submit to notify the medical director the forms are ready for review and signature.

Once the Brand Choice form is saved during the VFC Re-enrollment, the VFC Process progress bar will show Step 3 in green.



Submit: During enrollment period, the **Submit** button will not be displayed until the three forms: provider agreement, provider profile and brand choice are saved. Clicking submit will submit the enrollment to the medical director for review. An automated email notification will be sent to medical director or equivalent informing that the VFC Re-Enrollment forms need to be reviewed.

Once the forms are submitted to Medical Director Review and Signature, the VFC Process progress bar will show Step 4 in green.



Print: The **Print** button will be enabled after the Provider Profile is saved. Clicking Print will print the Brand Choice form for the selected date range as a PDF file.

Cancel: When pressed, the **Cancel** command button will route the user to the Home pages. Any changes made on the Brand Choice form are not saved.

Next: The **Next** button will be enabled after the Brand Choice is saved at least once during the re-enrollment period. The Next button will be enabled only for Medical Director or Equivalent and Idaho Immunization Program roles that can submit on Review and Sign. When Next is clicked, the user will be taken from the Vaccine Brand Choice page to the Review and Sign page.

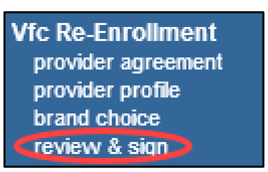
Review and Sign
(by authorized Medical Director or Equivalent user)

The Provider Agreement, Provider Profile and Brand Choice forms can be filled out be Administrative or the Medical Director or Equivalent users for your organization.
The Medical Director or Equivalent for your organization is the only person that can submit the VFC Enrollment forms to the Idaho Immunization Program.

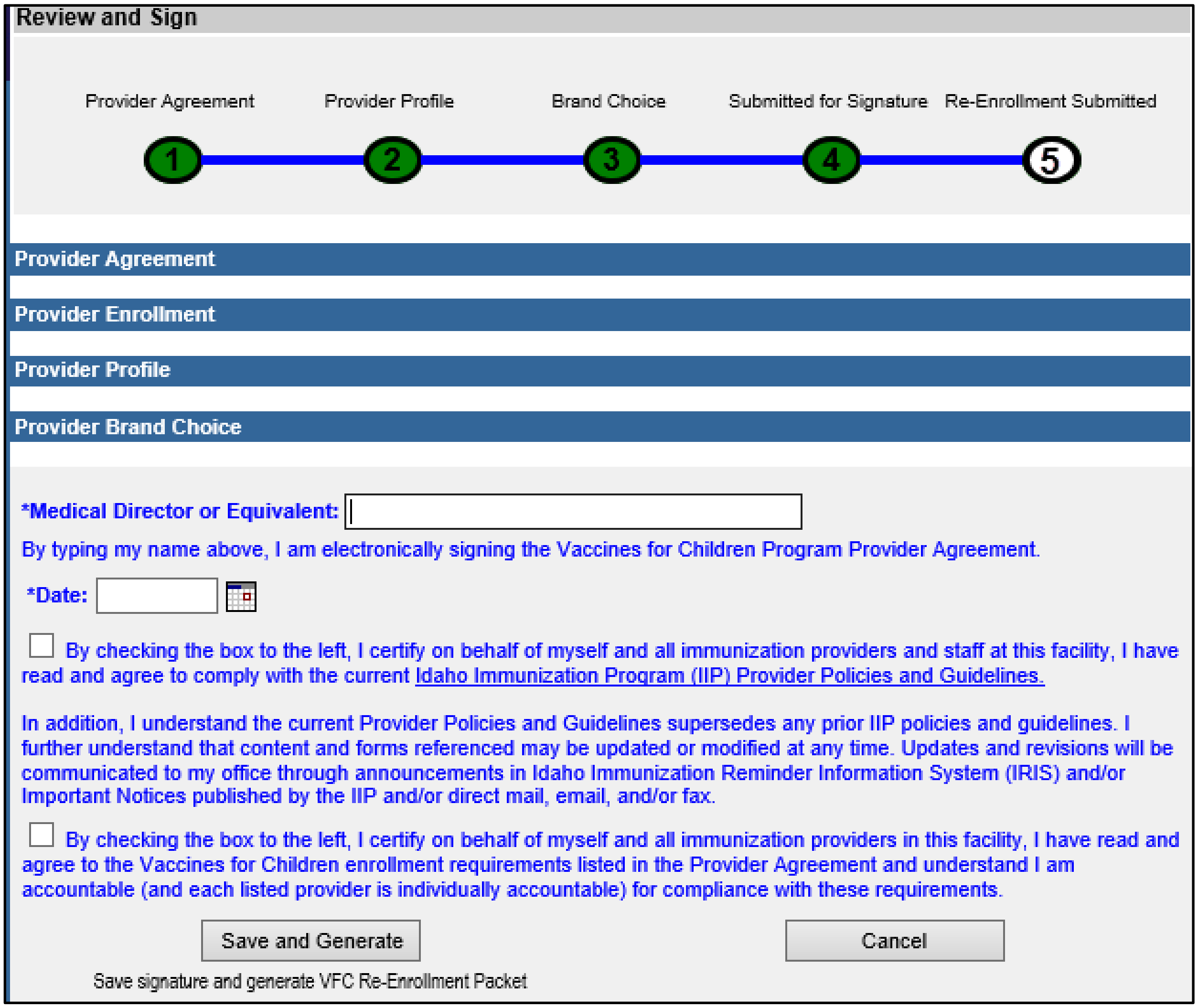
If your organization does not have a current user setup with Medical Director or Equivalent user, you will need to submit a request to the Idaho Immunization Program for user access. You may request one through the IRIS Login page or by clicking on the following link: [Healthcare Provider: REQUEST AN IRIS ACCOUNT](https://healthandwelfare.idaho.gov/Health/IDImmunizationProgram/HealthcareProviders/RequestanIRISAccountHealthcareProvider/tabid/3794/Default.aspx)

https://healthandwelfare.idaho.gov/Health/IDImmunizationProgram/HealthcareProviders/RequestanIRISAccountHealthcareProvider/tabid/3794/Default.aspx

1. Login to IRIS as Medical Director or Equivalent.
2. From the left men on the IRIS Home page, click review and sign under Vfc Re-Enrollment on the left side of the screen.



3. The Review and Sign page will open.



Review and Sign

Provider Agreement

Provider Enrollment

Provider Profile

Provider Brand Choice

***Medical Director or Equivalent:**

By typing my name above, I am electronically signing the Vaccines for Children Program Provider Agreement.

***Date:**

☐ By checking the box to the left, I certify on behalf of myself and all immunization providers and staff at this facility, I have read and agree to comply with the current Idaho Immunization Program (IIP) Provider Policies and Guidelines.

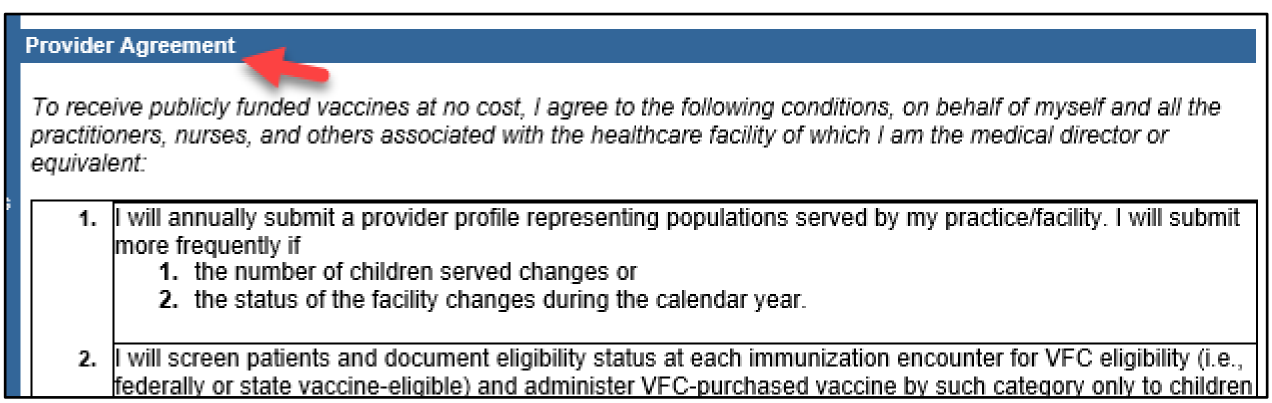
In addition, I understand the current Provider Policies and Guidelines supersedes any prior IIP policies and guidelines. I further understand that content and forms referenced may be updated or modified at any time. Updates and revisions will be communicated to my office through announcements in Idaho Immunization Reminder Information System (IRIS) and/or Important Notices published by the IIP and/or direct mail, email, and/or fax.

☐ By checking the box to the left, I certify on behalf of myself and all immunization providers in this facility, I have read and agree to the Vaccines for Children enrollment requirements listed in the Provider Agreement and understand I am accountable (and each listed provider is individually accountable) for compliance with these requirements.

Save and Generate | Cancel

Save signature and generate VFC Re-Enrollment Packet

4. Review each page of the provider re-enrollment, paying close attention to the Provider Agreement. To review a page just click on the page name on the left side menu under Vfc Re-Enrollment or directly on the Review and Sign page. For example, to read the Provider Agreement click Provider Agreement.



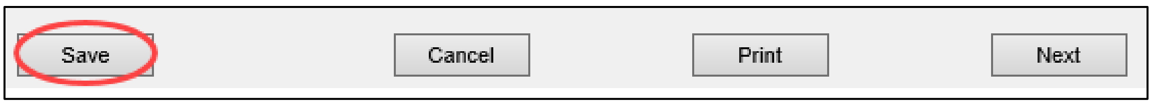
Provider Agreement

To receive publicly funded vaccines at no cost, I agree to the following conditions, on behalf of myself and all the practitioners, nurses, and others associated with the healthcare facility of which I am the medical director or equivalent:

1.	I will annually submit a provider profile representing populations served by my practice/facility. I will submit more frequently if **1.** the number of children served changes or **2.** the status of the facility changes during the calendar year.
2.	I will screen patients and document eligibility status at each immunization encounter for VFC eligibility (i.e., federally or state vaccine-eligible) and administer VFC-purchased vaccine by such category only to children

a. If necessary, then you may edit the information listed by clicking the edit button at the top of the section.

b. If changes are made, then be sure to click the Save button at the bottom of the page.

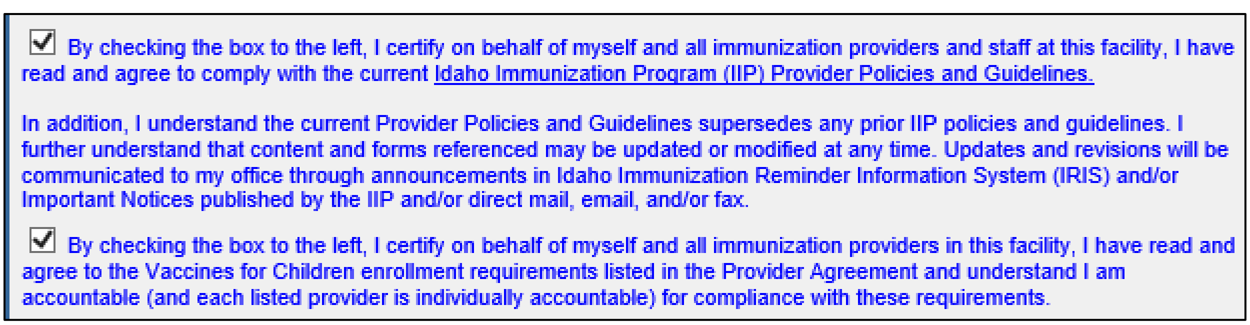


5. After all pages have been reviewed, please type your name in the Medical Director or Equivalent signature field. By typing your name in the field you are electronically signing the Vaccines for Children Provider Agreement.

6. Next, enter the date in the Date field (mm/dd/yyyy).

7. Next, read the Idaho Immunization Program (IIP) Provider Policies and Guidelines which may be found by clicking the link above or through the link provided on the Review and Sign page (see below).

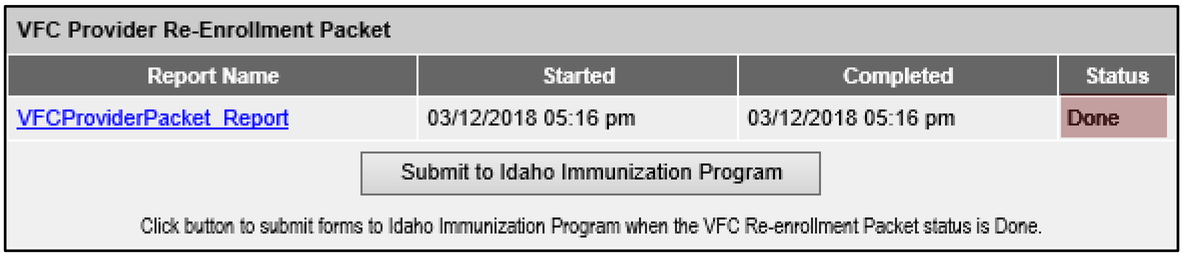
8. Next, check the boxes located under the signature line indicating you have read and agree to comply with the Vaccines for Children enrollment requirements and the IIP Provider Policies and Guidelines.



9. After you have reviewed the pages, your name and the date have been entered, and both boxes checked, click the Save and Generate button to process the re-enrollment paperwork.

10. The VFC Provider Re-Enrollment Packet page will open.

11. As soon as report status changes to Done, the re-enrollment is ready to be submitted to the IIP



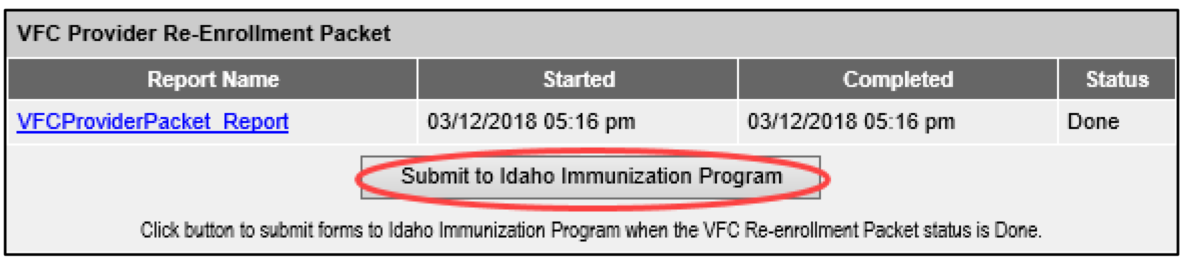
VFC Provider Re-Enrollment Packet

Report Name	Started	Completed	Status
VFCProviderPacket_Report	03/12/2018 05:16 pm	03/12/2018 05:16 pm	Done

Submit to Idaho Immunization Program

Click button to submit forms to Idaho Immunization Program when the VFC Re-enrollment Packet status is Done.

12. To submit the Re-enrollment packet, click the Submit to the Idaho Immunization Program button.

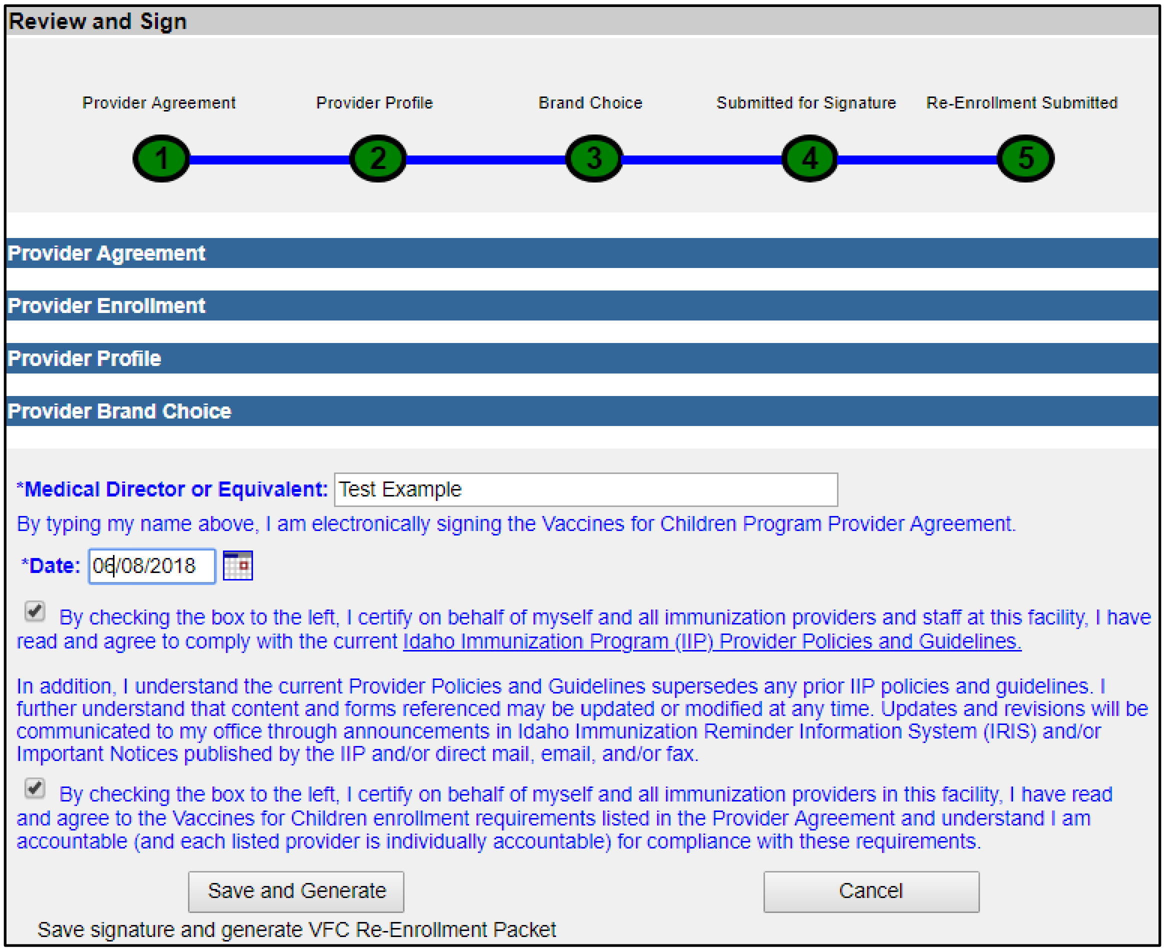


VFC Provider Re-Enrollment Packet

Report Name	Started	Completed	Status
VFCProviderPacket_Report	03/12/2018 05:16 pm	03/12/2018 05:16 pm	Done

Submit to Idaho Immunization Program

Click button to submit forms to Idaho Immunization Program when the VFC Re-enrollment Packet status is Done.



When the forms are successfully submitted to the IIP, then VFC Process progress bar Step 5 will be green.

Your organization's re-enrollment is complete and a copy of the paperwork will be emailed to you, the primary vaccine coordinator, and the back-up immunization coordinator.

If you have any questions about the current Provider Agreement, Provider Profile, or Policies and Guidelines, then please contact the IIP at (208) 334-5931.

Profile Updates Outside of VFC Re-Enrollment

An organization that is enrolled in VFC can submit updates to VFC Provider Information outside of the VFC Re-Enrollment period. The Provider Enrollment, Provider Profile and Vaccine Brand Choice can be updated individually as necessary. Medical Director Review and signature and VFC packet submission to IIP is not required.

The following changes are applicable when this happens.

- **Save:** The message '**Saved successfully and submitted to the Idaho Immunization Program**' will be displayed. The VFC Progress bar is not updated.

- An automated mail will be sent to IIP which lists the fields that were updated since the last save.

Maintenance

In this chapter:

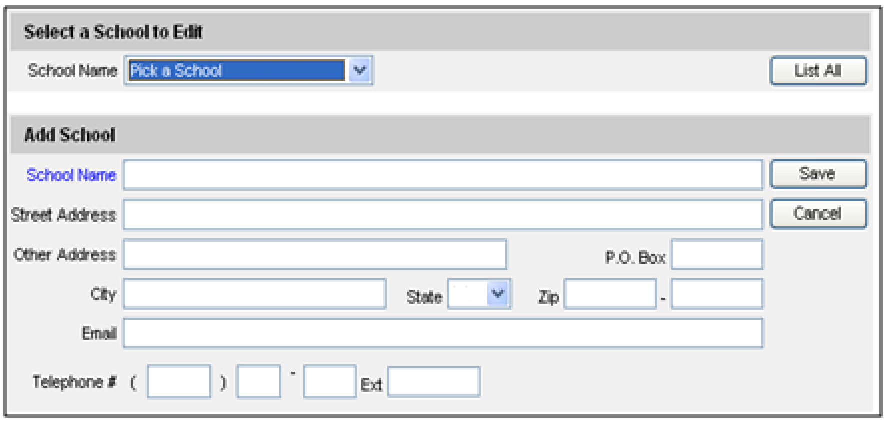
The Maintenance section on the menu panel allows IRIS Administrative Users to add and update information on schools, physicians, and clinicians.

Managing Schools

IRIS Administrative Users may enter new and update existing schools and daycare centers using the Manage Schools function. Schools entered using this function will be available for selection from a drop down list on the Patient Demographic screen. Reports may then be generated by school.

Adding Schools

1. On the IRIS Home page, click on **"Manage Schools"** under the "Maintenance section" of the menu panel.
2. On the Manage Schools screen, press Add School.

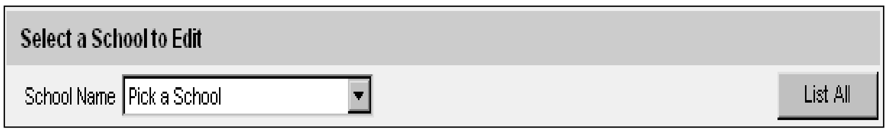


3. Below the **Add School** box, fill in the name of the school in the appropriate text field. Enter any additional information you wish to supply for the school in the appropriate fields.
4. Press Save.
5. Once your school information is successfully saved, "**School Added**" will appear in the upper right corner of the Edit School box.
6. Press List All to return to the Manage Schools screen.

Note: Required fields are shown in blue text. For example, when entering information on the Add School screen, the School name is required; thus they are shown in blue type. Fields not shown in blue are optional.

Editing School Information

1. On the IRIS Home page, click on **Manage Schools** under the Maintenance section of the menu panel.
2. On the Manage Schools screen, choose the school whose information you would like to edit from the **“Select a School to Edit”** drop down list at the top of the screen. Or, click on the school’s name in the School Listing at the bottom of the screen.



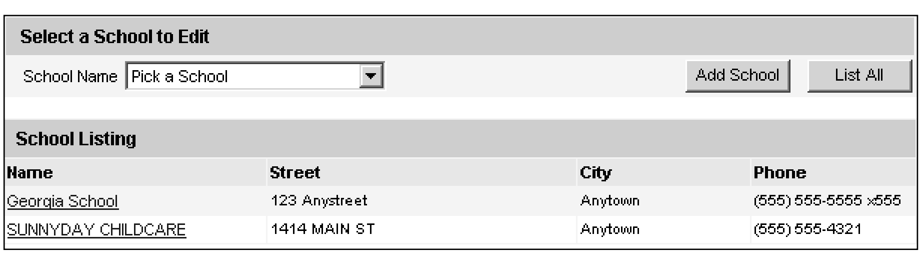
3. Add or change information in the Add School box.
4. Press Save.
5. Once your changes are successfully saved, “**School Updated**” will appear in the upper right corner of the box.
6. Press Cancel twice, or the List All button, to return to the Manage Schools screen.

Deleting Schools

1. On the IRIS Home page, click on **Manage Schools** under the Maintenance section of the menu panel.
2. On the Manage Schools screen, choose the school whose information you would like to delete from the Select a School to Edit drop down list at the top of the screen.
3. In the Edit School box, press Delete.
4. A box will open asking if you want to delete this school. Press OK.
5. IRIS will return to the Manage Schools screen and the message “**School Deleted**” will appear at the upper right corner of the screen.

Listing All Schools

A list of all schools entered into an organization’s database may be viewed by choosing List All on the Manage Schools screen.

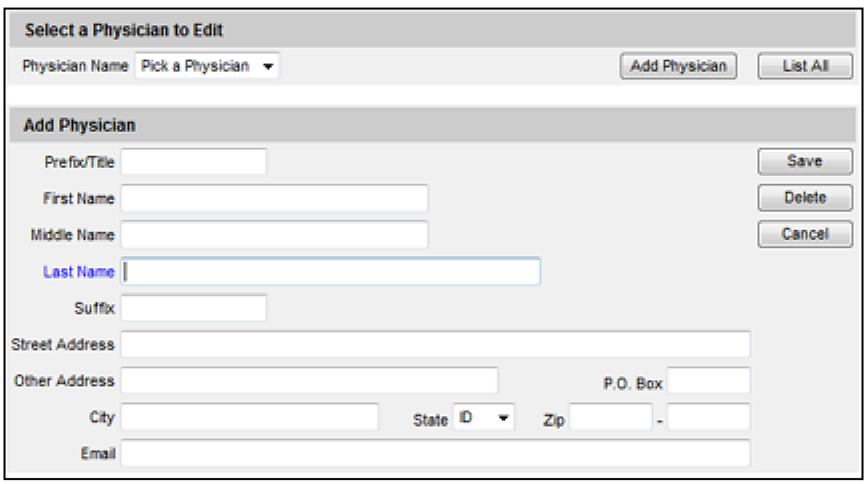


Managing Physicians

Physicians are considered Primary Care Providers (PCP) in IRIS. Administrative users can utilize the Add Physician/Edit Physician screens to enter new and update existing Primary Care Providers. Health care organizations or clinic names may also be entered in the Add Physician screen. Physicians or health care organizations entered on this screen will be available for selection from the Provider (PCP) drop down list on the Patient Demographic screen. Reports may then be generated from this data.

Adding Physicians

1. On the IRIS Home page, click on **Manage Physicians** under the Maintenance section of the menu panel.
2. On the Manage Physicians screen, press Add Physician.
3. At the Add Physician box, fill in the required field, Last Name, plus any additional information you wish to supply about the physician. The Prefix/Title field, for example, could be filled with “Dr.” or the Suffix field would then be “M.D.” To add a clinic name, type the site name in the Last Name field and the location in the First Name field.

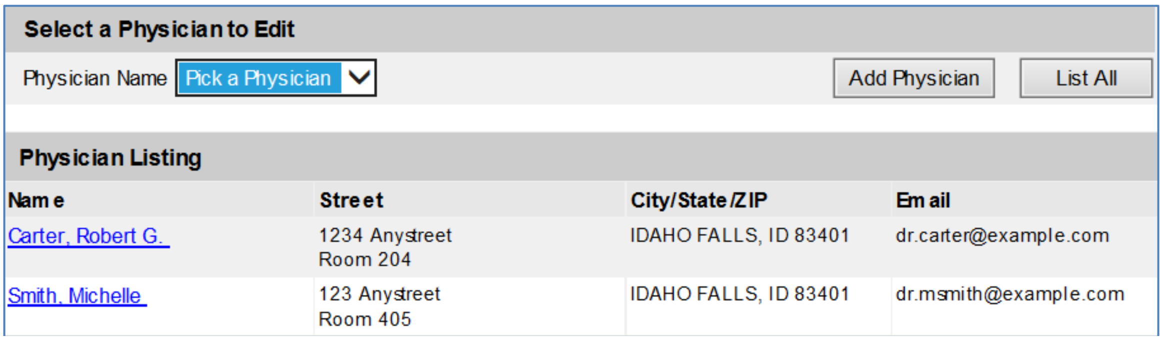


4. Press Save.
5. Once the physician is successfully saved, “**Physician Added**” will appear in the upper right corner of the Edit Physician box.
6. Press List All button to return to the Manage Physicians screen.

Note: When entering a physician on the Add Physician screen, keep in mind that this is a primary care provider, which is associated to the patient and not to a vaccination. Provider-PCP may be used for filtering when running a Reminder/Recall report.

Editing Physician Information

1. On the IRIS Home page, click on **Manage Physicians** under the Maintenance section of the menu panel.
2. On the Manage Physicians screen, choose the physician whose information you would like to edit from the Physician Name drop down list at the top of the screen. Or, click on the physician's name in the Physician Listing at the bottom of the screen.



3. Add or change information in the Edit Physician box.
4. Press Save.
5. Once your changes are successfully saved, "**Physician Updated**" will appear in the upper right corner of the Edit Physician box.
6. Press Cancel twice, or List All to return to the Manage Physicians screen.

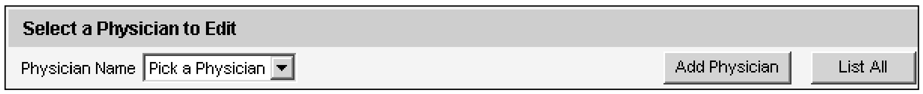
Note: When adding Physicians and Clinicians into IRIS, this does not create an IRIS User Account for them. To have a user account created for a Physician or Clinician contact the IRIS Help Desk (208)334-5995.

Deleting Physicians

1. On the IRIS Home page, click on **Manage Physicians** under the Maintenance section of the menu panel.
2. On the Manage Physicians screen, choose the physician whose information you would like to delete from the Physician Name drop down list at the top of the screen. Or, click on the physician's name in the Physician Listing at the bottom of the screen.
3. In the Edit Physician box, press Delete.
4. A box will open asking if you want to delete this physician. Press OK.
5. Once your changes are successfully saved, "**Physician Deleted**" will appear in the upper right corner of the Manage Physicians screen.

Listing All Physicians

A list of all physicians entered into an organization's database may be viewed by pressing List All on the Select a Physician to Edit screen.

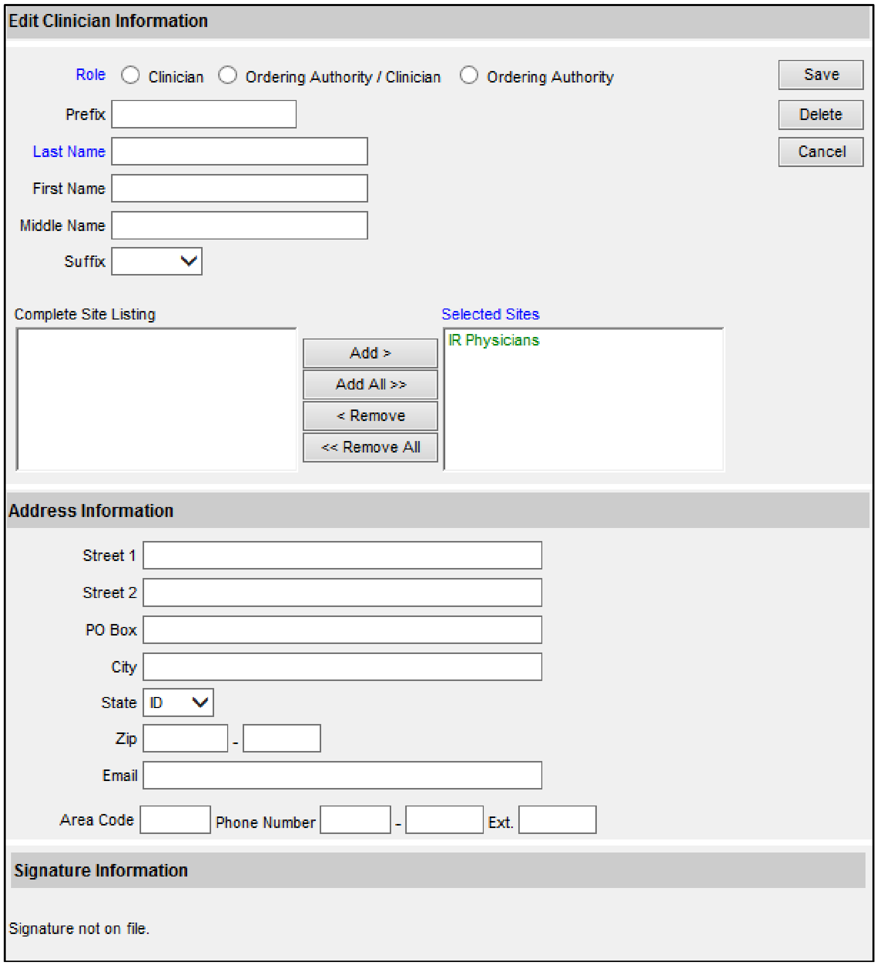


Managing Clinicians

Clinicians are the individuals within the organization who administer vaccines to patients. Ordering Authorities are the individuals that approve the administration of vaccines. A clinician/ordering authorities are specific to a single provider organization. To associate a clinician/ordering authority to more than one provider organization that clinician/ordering authority will have to be created separately within each organization. Examples of clinicians are physicians, physician assistants, and nurses. IRIS Administrative Users will use the Manage Clinicians function to enter new, and update existing clinicians/ordering authorities within their organization. Clinicians added to IRIS through this function will be available from drop down lists used for recording immunizations.

Adding Clinicians

1. On the IRIS Home page, click on **Manage Clinicians** under the Maintenance section of the menu panel.
2. Press Add Clinician.



3. At the Add Clinician Information screen, choose a role for the clinician. Definitions of these roles are as follows:

   Clinician: The Clinician is the person who administers the vaccination.

   Ordering Authority: The Ordering Authority is the individual that authorizes the administration of a vaccine.

   Ordering Authority/Clinician: Check this option if the person both authorizes and administers vaccines, such as a pediatrician.

4. Fill in the required field, Last Name, and any other fields you wish to complete. The Prefix field, for example, might be filled with "Dr." and the Suffix field would then be "M.D."
5. In the Complete Site Listing field, highlight a site with which the clinician will be associated and press Add. It is expected that only a single site will be listed here and that it will be identically named to the user's provider organization.
6. Press Save.
7. After the clinician is successfully saved, the message "**Record Updated**" will appear at the top of the screen.
8. Press Cancel to return to the Manage Clinicians screen.

Notes: Required fields are shown in blue text. For example, when entering information on the Managing Clinicians screen, the clinician last name is required; thus they are shown in blue text. Input fields not shown in blue are optional.

Editing Clinician Information

1. On the IRIS Home page, click on “Manage Clinicians” under the Maintenance section of the menu panel.
2. Press Find Clinician or click on the appropriate clinician name on the table at the bottom of the Manage Clinicians screen. If you choose this latter option, skip to Step 4.
3. At the Clinician Search screen, enter the last and first names of the clinician and press Find to bring up his or her information. Then click on his or her last name in the Search Results table. To bring up a list of all clinicians within an organization, leave both fields blank and press Find. You may then click on the last name of the clinician within the Search Results table to bring up his or her information.

4. Make the desired changes or updates to the clinician’s information.
5. Press Save.
6. Once the clinician’s information is successfully updated, the message “Updated clinician: “<last name>, <first name>” will appear at the bottom of the screen.
7. To return to the Manage Clinicians screen, press Cancel.

Merging Clinicians

Occasionally, clinicians are entered more than once in IRIS, creating duplicate records. To eliminate extraneous records using the IRIS merge clinician feature, follow these steps:

1. On the IRIS Home page, click on “Manage Clinicians” under Maintenance section of the menu panel.
2. Press Find Clinician.
3. Enter the last and first names of the clinician. Press Find.
4. Select at least two clinicians from the search results table and press Merge.

Deleting Clinicians

1. On the IRIS Home page, click on "Manage Clinicians" under the Maintenance section of the menu panel.
2. On the Manage Clinicians screen press Find Clinician or click the appropriate clinician name in the table at the bottom of the Manage Clinicians screen. If you choose the latter option, skip to step 5.
3. At the Clinician Search screen, enter the first and last name of the clinician and press Find to bring up his or her information. Then click on his or her last name in the Search Results table. Or, leave both fields blank and press Find to bring up a list of clinicians within the organization. You may then click on the last name of the clinician within the Search Results table to bring up his or her information.
4. At the Edit Clinician Information screen, press Delete.
5. A box will open asking if you want to delete this clinician. Press OK.
6. IRIS will return you to the Manage Clinicians screen.

Listing All Clinicians

1. On the IRIS Home page, click on "Manage Clinicians" under the Maintenance section of the menu panel.
2. On the Manage Clinicians screen, press Clinician List.
3. The Clinician Listing screen will open, showing all available clinicians, their organization association(s), and their role(s).
4. Press Close to return to the Manage Clinicians screen.

Creating and Maintaining Cold Storage Units

The **Manage Cold Storage** module is for the purpose of creating and maintaining cold storage units (i.e. refrigerators and freezers). Your administrator will maintain your cold storage units.

There are two screens associated to the **Manage Cold Storage** module, the Manage Cold Storage screen (Figure 1A) and Add/Edit Cold Storage Unit screen (Figure 1B) respectively.

Manage Cold Storage

Select **Manage Cold Storage** from the Maintenance section of the menu panel. Subsequently Figure 1A will display.

<u>From this screen:</u>

- Select **Add Unit** to create a new refrigerator or freezer. Subsequently Figure 1B will display.

- To edit an existing refrigerator or freezer select the associated hyperlink (name). Subsequently Figure 2B will display.
- Notice the Refrigerator/Freezer indicates what type of cold storage unit each is.

Figure 1A – Manage Cold Storage Screen

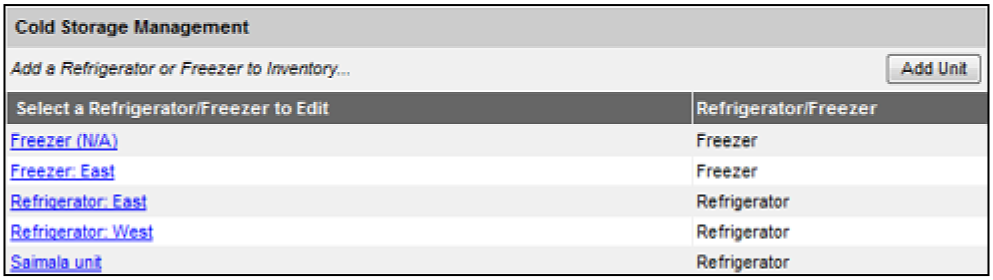
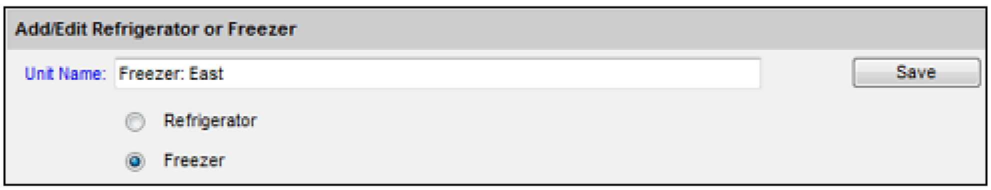


Figure 1B – Add/Edit Cold Storage Unit Screen



To Create A New Refrigerator or Freezer:

- Select the **Add Unit** button from Figure 1A.
- Figure 1B will display however all fields will be blank.
- Input a Unit Name
  - Names must be unique within an organization.
  - Required field.
- Indicate whether the cold storage unit is a refrigerator or freezer.
  - Required field.
- Select the **Save** button.

To Edit an Existing Cold Storage Unit:

- Select the cold storage unit's name (hyperlink) from Figure 2A.
- Figure 1B will display, and the fields will populate with the existing information.
- Change the Unit Name.
  - Names must be unique within an organization.
  - Required field.
- Change the cold storage unit type.
  - Required field.
- Select the **Save** button.

Note: Changing a refrigerator to a freezer or freezer to refrigerator will impact the acceptable temperature range within the Record Cold Storage screen and Cold Storage Report.

Manage Provider Profile

The Manage Provider Profile link is used as a shortcut to the VFC Re-Enrollment address and contacts. Refer to *Chapter 6 VFC Re-Enrollment* for information updating your organization’s address and staff contact information.

Manage Vaccine Delivery Hours

The Manage Vaccine Delivery Hours link is used as a shortcut to the Manage Orders screen used to review and modify vaccine delivery hours and special instructions. Refer to *Chapter 8 Managing Inventory* for managing orders.

Managing Inventory

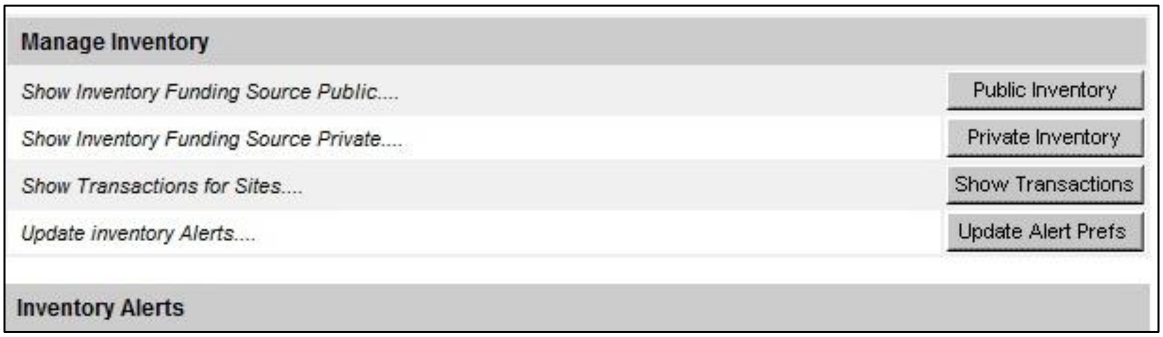
In this chapter:

The Inventory Module in IRIS is designed to be a complete tracking system for a provider's vaccine inventory. Administrative Users of IRIS have the ability to set up the inventory module for their organization and regularly view, add, or update any vaccine in an organization's inventory.

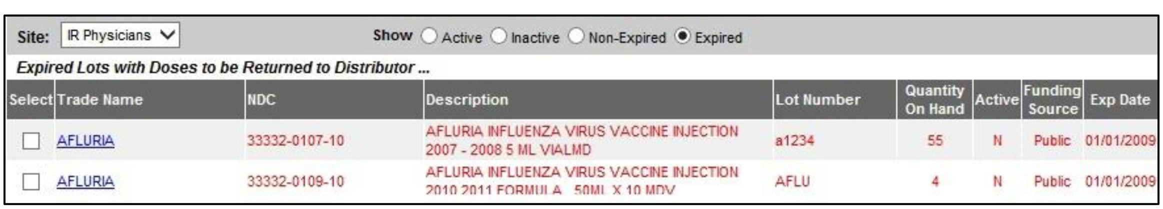
View Inventory

To view your organization's vaccine inventory in IRIS, follow these steps:

1. Click on **Manage Inventory** under the Inventory section of the menu panel.
2. On the Manage Inventory screen, press either the Public Inventory or Private Inventory button.



3. Select the Site of the inventory display.
4. Select one of the following types of vaccine lots to display:
   - **Active**: Select the 'Active' option to view only those vaccine lots that have valid (non-expired) doses remaining in the inventory module, that are also designated as *Active*. The Active table is the default table on the Manage Inventory-Funding Source Public and –Funding Source Private screens.
   - **Inactive**: Select the 'Inactive' option to view only those vaccine lots that have been set to *Inactive* by a user or automatically inactivated due to no doses remaining or due to the lot expiring.
   - **Non-Expired**: Select the 'Non-Expired' option to view any *Active* or *Inactive* inventory that has not yet expired. **Expired**: Select the 'Expired' option to view any inventory that has expired. The Expired table has two sections: Expired Lots with Doses to be Returned to Distributor and Expired Lots with No Remaining Inventory.


Site: IR Physicians Show Active Inactive Non-Expired Expired

Expired Lots with Doses to be Returned to Distributor ...

Select	Trade Name	NDC	Description	Lot Number	Quantity On Hand	Active	Funding Source	Exp Date
	AFLURIA	33332-0107-10	AFLURIA INFLUENZA VIRUS VACCINE INJECTION 2007 - 2008 5 ML VIALMD	a1234	55	N	Public	01/01/2009
	AFLURIA	33332-0109-10	AFLURIA INFLUENZA VIRUS VACCINE INJECTION 2010 2011 FORMULA .50ML X 10 MDV	AFLU	4	N	Public	01/01/2009

Expired Lots with No Remaining Inventory ...

Select	Trade Name	NDC	Description	Lot Number	Quantity On Hand	Active	Funding Source	Exp Date
n/a	MMR II	00006-4681-00	MMR II 10 X 1 DOSE VIALS	101	0	N	Public	01/09/2011
n/a	Pediarix	58160-0811-52	PEDIARIX 10 X 1 SYRINGES	U256	0	N	Public	02/28/2009
n/a	Pediarix	58160-0811-52	PEDIARIX 10 X 1 SYRINGES	111	0	N	Public	01/09/2010

Notes: The red text in the View Inventory screen indicates that a vaccine is inactive. A vaccine may be inactive for a number of reasons: the inventory for that vaccine's lot may be used up, the vaccines in that lot may be expired, or the vaccines in that lot may have been recalled and set to inactive by a user.

Active vaccine lots on the View Inventory screen that are highlighted in pink will expire within 90 days.

The Show Inventory button has been deleted and has been replaced by the Public Inventory and Private Inventory buttons. The list of public- and private-funded inventory has been separated; thus, the user is not able to see both types of inventory together on the Manage Inventory screen.

The following is an explanation of the columns in the inventory table:

Site: IR Physicians   Show ○ Active ○ Inactive ◉ Non-Expired ○ Expired

Select	Trade Name	NDC	Description	Lot Number	Quantity On Hand	Active	Funding Source	Exp Date
☐	AFLURIA	33332-0107-10	AFLURIA INFLUENZA VIRUS VACCINE INJECTION 2007 - 2008 5 ML VIALMD	FLU342	6	Y	Public	09/03/2018
☐	Acel-Imune	55555-4444-22	cbb-abcde	cbb-lot-2	0	N	Public	10/24/2030
☐	Adacel	11793-4001-05	ADACEL TETANUS TOXOID REDUCED DIPHTHERIA TOXOID AND ACELLULAR PERTUSSIS VACCINE ADSORBED INJECTION 5 X 1 DOSE SYR	AD2342K	0	N	Public	01/01/2019
☐	FluLaval Quad	19515-0891-11	FluLaval testing	FLV234	14	Y	Public	01/01/2018
☐	Fluvirin Pres-Free	66521-0114-02	FLUVIRIN 10 X 1 SYRINGES	LFUV234	10	Y	Public	01/01/2019

Select: A mark in this checkbox allows you to modify the quantity of the selected vaccine. Users can modify the quantity of multiple vaccine lots by selecting them and pressing Modify Quantity.

Trade Name: This column lists the vaccine's trade name. Select the hyperlink to view/edit the individual vaccine lot.

NDC: This column lists the National Drug Code (NDC) for the vaccine.

Description: This column lists the packaging description of the NDC.

Lot Number: This column lists the lot number of the vaccine.

Quantity On Hand: This column lists the number of doses remaining for the vaccine lot in the organization's inventory.

Active: A "Y" in this column indicates the inventory is active (available for use). An "N" indicates the vaccine is inactive (unavailable for use because the vaccine lot does not have any doses remaining in inventory, the vaccine lot has expired or the vaccine lot was set to inactive by a user). Inactive vaccines are shown in red text.

Funding Source: A "Public" in this column indicates the vaccine was supplied by State or Federal funding. A "Private" indicates that the vaccine is private stock purchased by the organization or through other funds. Since the list of private- and public-funded inventory has been separated, you will not see a combination of Private and Public Funding Sources in this column.

Exp Date: This column gives the vaccine's expiration date. Active vaccines lots that will expire within 90 days or less are highlighted in pink

Adding Inventory

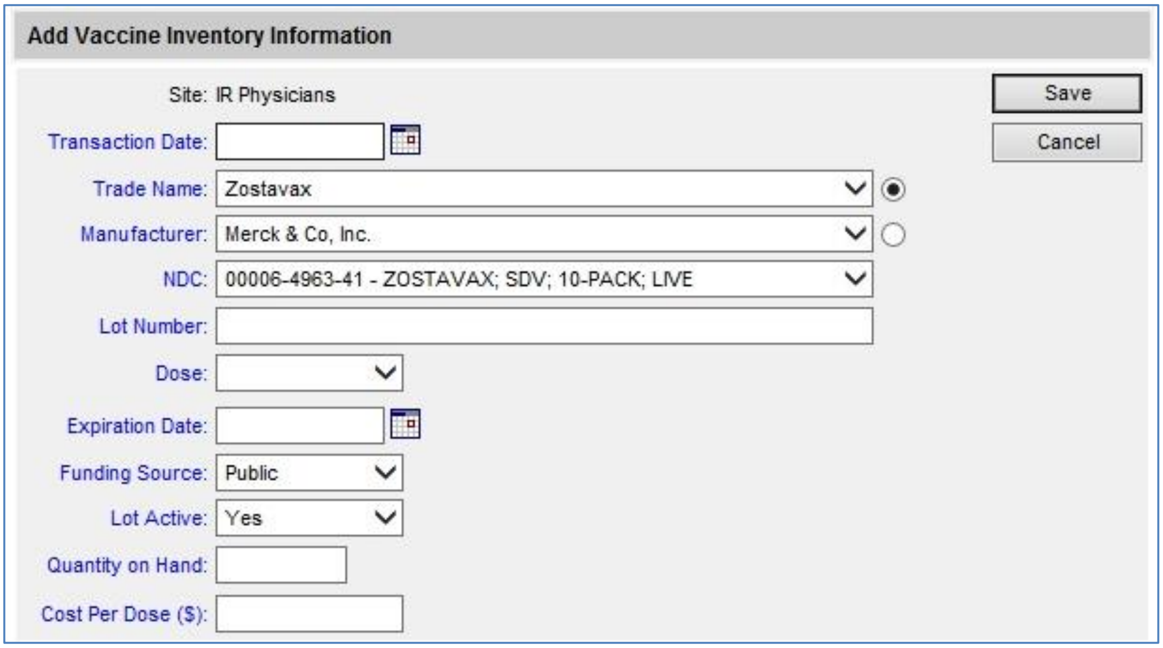
Use the Add Vaccine function only if you are adding a vaccine with a ***new*** lot number. If you are adding vaccine to a lot number that already exists in your inventory, refer to *Updating Inventory* below.

IMPORTANT: VFC vaccine order shipments are imported into IRIS by the VFC Program and are created as inbound inventory transfer records for your organization. To add a VFC public funded vaccine lot, you need to accept the inventory transfer record. To find out how to find and accept VFC shipments Refer to *Vaccine Inventory Transfer* sections of this chapter on *Accepting and Rejecting Transfers*.

The only time you should have to add a lot using manage inventory is if you are entering private funded vaccine. If you receive a public funded vaccine lot that does not show in your inbound transfer list or does not match the shipping invoice, please contact the Idaho Immunization Program at (208) 334-5931 or IIP@dhw.idaho.gov to work with vaccine management staff.

You will not be able to see the Add Inventory button until you press either the Public Inventory or Private Inventory button on the Manage Inventory screen. If you are a provider-level user, you will not see the Add Inventory button on the Manage Inventory-Funding Source Public screen.

1. Click on **Manage Inventory** under the Inventory section of the menu panel.
2. On the Manage Inventory screen, press either the Public Inventory or Private Inventory button.
3. On the Manage Inventory-Funding Source Private or -Funding Source Public screen, press Add Inventory. (Note: Provider-level users will not see the Add Inventory button.)
4. At the Add Vaccine Inventory Information screen, do the following:



5. Enter the Transaction Date. The Transaction Date field is mandatory and it enables the user to record the date when a vaccine was actually added to a site's inventory. Fill in the field using the MM/DD/YYYY format or click the calendar icon to the right of the field. (To use the calendar icon, choose a month and year from the drop-down lists at the top, click on the appropriate calendar day and press OK.)
6. Choose the vaccine's trade name from the drop down list provided. Once you have selected a trade name, the Manufacturer field will be populated. To select by manufacturer, select the associated radio button. The Trade Name drop down list will then populate with trade names for that manufacturer.
7. Select the corresponding NDC code of the vaccine lot. NDC is required for both public- and private-funded lots. Contact the IRIS Help Desk, (208) 334-5995, if the NDC is not present within the drop down list.
8. Enter the lot number of the vaccine in the Lot Number text box.
9. Choose the dose from the Dose Size drop down list; choose .1, .2, .25, .5, .65, 1.0, 2.0 or 100.0 ml.
10. Enter the vaccine lot's expiration date. Fill in the field using the MM/DD/YYYY format or use the pop-up calendar by clicking the calendar icon to the right of the field. Then choose a month and year from the drop down lists at the top and choose a day by

clicking on the appropriate calendar day. Press OK. If no day is specified on the vaccine, enter the last day of the month.

11. Choose the funding source (public or private) of the vaccine. Publicly funded vaccines are provided by State or Federal funding programs. Idaho Immunization Program vaccine management staff are the only users have the option of adding public- or private-funded vaccines, but provider-level users can add private-funded vaccines.
12. Choose Yes from the Lot Active drop down list. When adding new inventory, the lot may only be entered as active. This controls whether the lot shows up on the drop down list on the add immunization screen. An expired lot cannot be saved as active.
13. Enter the number of vaccine doses received in the Quantity on Hand text box.
14. Enter the cost per dose of the vaccine in the Cost Per Dose Field. For public-funded vaccines, Cost Per Dose is mandatory. For private-funded vaccines, it is optional.

5. Press Save.
6. If the new vaccine was saved successfully, the message "Inventory was inserted successfully" will appear at the bottom of the screen.
7. To return to the Manage Inventory screen for public- or private-funded vaccines, press Cancel.

Updating Inventory

There are two screens for updating inventory in IRIS. The Edit Vaccine Inventory Information screen allows a user to change every feature of a vaccine lot, from the trade name to the cost per dose to the quantity on hand to the name of the vaccine lot. The Modify Quantity on Hand screen is available for users who just want to update the quantity of one or more vaccine lots.

IMPORTANT: Only the Idaho Immunization Program is allowed to edit public-funded inventory fields and modify quantity using the full list of reasons.

On the Modify Quantity screen, provider-level users can subtract anonymous doses from public-funded vaccine lots.

To change information on existing vaccines, follow these steps:

1. Click on **Manage Inventory** under the Inventory section of the menu panel.
2. On the Manage Inventory screen, press either the Public Inventory or Private Inventory button. The inventory table shown by default will display the organization's active vaccines.

3. Select the vaccine lot you wish to update by clicking on the vaccine trade name.

4. On the Edit Vaccine Inventory Information screen, make desired changes to any of the fields above the Modify Quantity on Hand section. Any changes made to a vaccine after a dose has been administered will be updated in the patient's records.

5. To modify the quantity of doses on hand, enter the following information in the Modify Quantity on Hand section.

6. Under Number of Doses, enter the quantity of inventory to be added or subtracted.

7. Under Transaction Date, enter the date when the quantity was added to or subtracted from inventory.

8. Choose a reason for changing the vaccine lot quantity by selecting from the Reason drop down list. See below:

Table 1: Reasons for adding or subtracting inventory

Receipt of inventory	Use this reason when you are adding new inventory to a lot.
Anonymous Dose	Use this reason when subtracting doses administered to patients who have opted out of IRIS through the Idaho Immunization Program.
Doses Restocked	Use this reason when restocking inventory that has been rejected by another provider.
Doses Transferred	Use this reason when subtracting inventory that has been transferred to another organization.
Doses Wasted	Use this reason when subtracting wastage from a vaccine lot. Wastage usually occurs because of broken vials, faulty injections, or improper refrigeration.
Doses returned to Distributor	Use this reason when subtracting doses that have been returned to the distributor.
Error correction (Add)	Use this reason when doses need to be added to inventory because of a data entry error.
Error correction (Subtract)	Use this reason when doses need to be subtracted from inventory because of a data entry error.

9. If you chose Doses Wasted or Doses Returned to Distributor as the Reason for modifying the quantity at hand, you must choose an option in the Detail drop-down:

Table 2: Doses Wasted Detail Options

Broken Vial/Syringe
Lost or unaccounted for vaccine
Non vaccine product (e.g. IG, HBIG, Dil)
Open vial but all doses not administered
Other
Vaccine drawn into syringe but not admin

Table 3: Doses Returned to Distributor Detail Options

Expired vaccine
Failure to store properly upon receipt
Mechanical failure
Natural disaster/power outage
Other
Recall
Refrigerator too cold
Refrigerator too warm
Spoiled--other
Vaccine spoiled in transit (Freeze/Warm)

10. Fill in the Explanation free text field. This field is mandatory when the Funding Source is public.
11. Press **Save**. Once your updates are saved in IRIS, the message “Inventory was updated successfully” will appear at the bottom of the screen.
12. Press **Cancel** to return to the Manage Inventory screen for public- or private-funded vaccines.

Notes: The Add New button, which allows you to add a new lot to inventory, is on the Edit Vaccine Inventory Information screen. However, you need to click the Save button on the Edit Inventory Information screen before you can use the Add New button.

If you edit a Dryvax (smallpox) vaccine lot whose Reconstituted indicator is set to No, you will see a Reconstituted button on the Edit Vaccine Information Inventory screen. Click on the Reconstitute button if you have reconstituted the doses by taking the Dryvax dry power formulation and mixing it with diluent. The button will take you to the Reconstitute Vaccine screen.

Modifying Quantities of Multiple Vaccines

To change inventory quantities of multiple vaccine lots, follow these steps:

1. Check the box under the Select column next to the vaccine lots whose quantities you want to modify.
2. Press **Modify Quantity**.
3. On the Modify Doses on Hand for Selected Site(s) screen, enter the following information.
4. Under Number of Doses, enter the quantity of inventory to be added or subtracted.
5. Under Transaction Date, enter the date when the quantity was added or subtracted for inventory.
6. Choose an explanation for changing the quantity of the vaccine lot by selecting from the Reason drop down list. Refer to the *Table 1* above for a description of the reasons for adding or subtracting inventory.
7. If you chose Doses Wasted or Doses Returned to Distributor as the Reason for modifying the quantity at hand, you must choose an option in the Detail drop-down. Refer to Tables 2 and 3 above for a list of details for recording wastage or returning doses to the distributor.
8. Fill in the Explanation field. This field is mandatory when the Funding Source is public.
9. Press **Save**.

Inventory Alerts

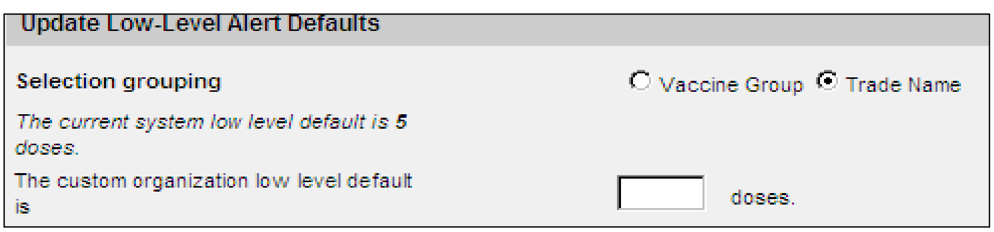
Inventory alerts inform users of the status of their organization's vaccine inventory. These lists are displayed on the IRIS homepage. Alerts for vaccines that are going to expire, and vaccines that are running low are initially generated by a system default setting, however, these alerts can be customized.

Inventory alerts can also be viewed on the Inventory Alerts screen. Select **Manage Inventory**, under the Inventory section of the menu panel. The top table, *Vaccine Order/Transfer Notification,* lists orders/transfers that have been shipped, orders/transfers that are awaiting return shipment, and orders/transfers that have been rejected. The next table, *Active Inventory That is Going to Expire or Expired Lots with a Quantity*, displays a list of vaccines within your organization's Inventory Module that will expire within a set amount of days, as well as vaccines that have expired but still have doses remaining in inventory. The last two tables display inventory that is running low either by vaccine group or trade name.

Updating Inventory Alert Preferences

To update Inventory Alert Preferences for expiration and low inventory alerts, follow these steps:

1. Click on **Manage Inventory** under the Inventory section of the menu panel.
2. Press **Update Alert Prefs**.
3. In the Inventory Expiration Alerts section, the system default is 90 days. To customize this alert, enter the number of days prior to the expiration of any vaccine lot that you would like to be notified.
4. For all low-level alerts the system default is 10 doses. To update these alerts, enter the number of doses that are preferred for low-level alerts for all vaccine groups and/or trade names. Select the appropriate radio button for Vaccine Group or Trade Name in the Update Low-Level Alert Defaults section and enter the number of doses.



Update Low-Level Alert Defaults

Selection grouping — Vaccine Group / Trade Name

The current system low level default is 5 doses.

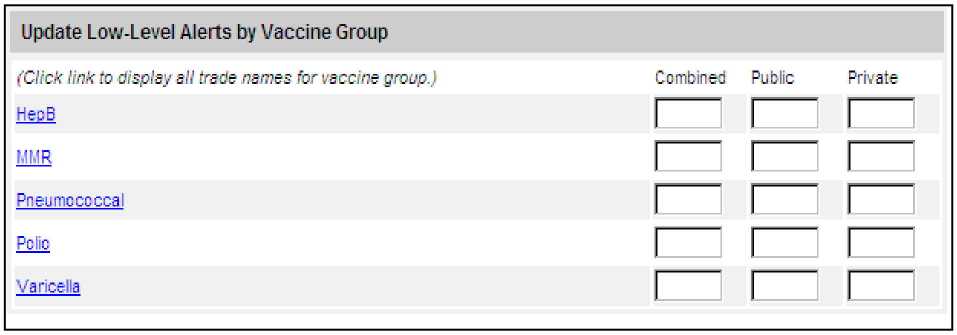
The custom organization low level default is ______ doses.

5. Press **Save**. If the new preferences were saved successfully, the message "Updated Alert Preferences" will appear at the top of the screen.

To customize low-level alerts for each individual vaccine group or trade name follow these steps:

Vaccine Group:

1. Under Update Low-Level Alerts by Vaccine Group, enter the number of doses that will indicate the inventory is running low for each vaccine group listed. You may enter a specific number of doses for private and public vaccines separately or you can enter one combined number for doses of both private and public funded inventory. *(Public-funded vaccines are provided by State or Federal funding and private-funded vaccines are purchased by your organization).*
2. Press **Save.**



Update Low-Level Alerts by Vaccine Group			
(Click link to display all trade names for vaccine group.)	Combined	Public	Private
HepB			
MMR			
Pneumococcal			
Polio			
Varicella			

Notes: To further specify low-level alerts, select an individual vaccine group hyperlink. The user will then have the option of configuring low-level alerts by trade name, for that vaccine group. Press ***Save*** to record these changes. To restore all inventory alerts to IRIS system defaults, press ***Reset to Default.***

Printing Inventory

To print out a list of inventory, follow these steps:

1. Click on **Manage Inventory** under the Inventory section of the menu panel.
2. Press the ***Public Inventory*** or ***Private Inventory*** button.
3. Do one of the following:
   - Choose Print from your browser's menu bar. In the Print dialog box, press OK.
   - Or press the printer icon on your browser's toolbar.
4. If your printout is cut off, try setting your printer to landscape. To do this:
   - Choose Print from your browser's menu bar.
   - In the Print dialog box, select Properties or Preferences.
   - In the Properties, or Preferences box, find the section where you may specify orientation. Choose landscape.
   - Press OK.
   - Press OK in the Print dialog box.

Show Inventory Transactions Report

The **Show Transactions** screen is used to display vaccine lot track records for all quantity-changing events that occur within a provider organization's inventory.

To view an inventory transaction report:

1. Click on **Manage Inventory** under the Inventory section of the menu panel.

2. Press **Show Transactions**.

3. On the Vaccine Transactions screen, do the following:

- Enter the Date Type and the From and To Dates:

  - Date Transaction Entered into IRIS – lists the date when an inventory adjustment was entered into IRIS. The earliest date you can enter is February 1, 2012.

  - Transaction Date – lists the date when doses were removed from or added to physical inventory. (The earliest date you can enter is February 1, 2012.) This may be the vaccination date on immunization records; the transaction date entered on the Add-Edit-Modify Quantity inventory screens; the transaction date on wastage requests; or the date inventory transfers or returns were shipped, accepted or restocked. This may be different than the date that the inventory adjustment was entered into IRIS.

  - Vaccination Date – lists the date when an immunization occurred. Vaccination Date will not include transactions entered as an "Anonymous Dose". It will only include transactions for immunizations given that were deducted from IRIS Inventory. Deleted immunizations within the date range will be included.

- Choose a specific username or All Usernames from the Username drop down list.

- Choose a specific transaction reason or All Transaction Reasons from the Transaction Reason drop down list. These transactions relate to the Manage Wastage and Returns functionality and the Reason drop down list on the Edit Vaccine Inventory Information screen. A description of Transaction Reasons is listed below:

Table 4: Inventory Transaction Types

Transaction Reason	Description
Anonymous Dose	This type indicates vaccines were subtracted from inventory because immunizations were given to patients having opted out of having their immunization records retained within IRIS.
Doses Reconstituted	This type indicates that a number of doses were subtracted from an un-reconstituted lot to form a new reconstituted lot.
Doses Restocked	This type indicates that rejected doses were returned to the sending organization and restocked.
Doses Returned to Distributor	This type indicates that doses were returned to the vaccine distributor because they were flawed.
Doses Transferred (TRA):	This type indicates vaccines were subtracted because they were transferred to another organization.
Doses Wasted	This type indicates vaccines were subtracted from inventory because they were wasted through faulty injections, broken vials, or improper refrigeration.
Error Correction	This type indicates vaccines were added or subtracted to correct a previous error or after getting extra or fewer doses from a vial.
Immunizations Given	This type indicates vaccines were subtracted from inventory because of immunizations given.
Receipt of Inventory	This type indicates vaccines were added as new inventory or as inventory entered into an existing lot with the same lot number and expiration date.

- Choose a Private or Public funding source or choose All Funding Sources from the Funding Source drop down list.
- Choose a specific vaccine group or All Vaccine Groups from the Vaccine Group drop down list.
- Choose a specific trade name or All Trade Names from the Trade Name drop down list.
- Choose a lot number. The Lot Number field is optional. Leaving the Lot Number field blank will include all lot numbers that meet the selection criteria.

6. You have the option of entering a report name in the 'Enter a Report Name' field or leaving it blank.
7. Select the report type as PDF or Excel.
8. Click the Generate Show Transaction Report button.

9. The **Show Transaction Report Request** screen will then display. Click on the file in the Report Name column when the Status is ‘Done’, and an Excel file will appear. (If Status is not ‘Done’, click on the Refresh button.)

Excel Output Option: The Show Transaction report Excel output contains two tabs:

- Transactions tab contains the following information:

Field Name	**Description**
Organization Name	This field displays the organization where the transaction took place.
Transaction Date	This field displays the date when the transaction took place.
Vaccine	This field displays the vaccine name listed in the transaction.
Trade Name	This field displays the trade name of the vaccine listed in the transaction
Lot Number	This field displays the lot number of the vaccine listed in the transaction.
Funding Source	This field displays the funding source of the vaccine listed in the transaction.
Quantity	This field displays the quantity added or subtracted for the listed transaction.
Transaction Reason	This field displays the reason the transaction that took place.
Vaccination Date	This field, when applicable, displays the date when a patient was vaccinated. This field is filled in if Transaction Reason is Immunizations Given.
Patient Name	This field, when applicable, displays the name of the patient who was vaccinated. This field is filled in if Transaction Reason is Immunizations Given.
Patient DOB	This field, when applicable, displays the patient's date of birth. This field is filled in if Transaction Reason is Immunizations Given.
Manage Inventory Explanation	This field, when applicable, displays the data the user entered into the Explanation field in the Manage Inventory module.
Detail	This field, when applicable, displays the data the user entered into the Detail field in the Manage Inventory module.
Wastage and Return ID	This field, when applicable, displays the W/R ID assigned to a Wastage or Return Request.

Field Name	Description
Wastage and Return Provider Comment	This field, when applicable, displays the data the provider user entered into the Provider-Level User Comments field in the Wastage and Return module.
Wastage and Return State Comment	This field, when applicable, displays the data the state-level user entered into the State-Level User Comments field in the Wastage and Return module.
Receiving Org Name	Name of the organization site receiving the vaccine inventory transfer shipped from your organization.
Receiving Org Pin	PIN of the organization site receiving the vaccine inventory transfer shipped from your organization.
Date Entered into IRIS	This field displays the date when the transaction was entered into IRIS.
Username	This field displays the name of the user who entered the transaction into IRIS.
Transaction ID	This field displays the transaction ID.

- Criteria tab, which displays the report filter criteria you entered and lists the number of records displayed in Transactions spreadsheet.

PDF Output Option: The Show Transaction report PDF output contains the following:

- Report Request Criteria
- Summary Table with Transaction Descriptions, Counts and Value.
- Transactions tab contains the following information:

Field Name	Description
Organization Name	This field displays the organization where the transaction took place.
Transaction Date	This field displays the date when the transaction took place.
Lot/Trade Name	This field displays the lot and trade name listed in the transaction.
Type	This field displays the reason the transaction that took place.
Qty	This field displays the quantity added or subtracted for the listed transaction.
Patient Name	This field, when applicable, displays the name of the patient who was vaccinated. This field is filled in if Transaction Reason is Immunize or Delete
DOB	This field, when applicable, displays the patient's date of birth. This field is filled in if Transaction Reason is Immunizations Given.

Printing Inventory Transactions

To print out a list of individual transactions, Select Print from the Excel or PDF output menu.

Notes: To view the “printed” Show Transaction Report as PDF, Adobe Reader® 6.0 or higher is required. If you do not have this installed on your computer, select the **Forms** link at the top of the screen, and the *Get Adobe Reader®* link from there, or contact your administrator.

To print the report, press the printer icon on the Adobe® toolbar. Press OK in the Print dialog box. To return to IRIS, press the Back button on your browser.

Doses Administered Report

The Doses Administered Report will give you information on how many doses of each vaccine have been given, by age, and within a specified date range. The report will only include immunizations deducted from IRIS inventory. To generate a Doses Administered report for your organization, follow these steps:

1. Click on the **Doses Administered** menu item under the Inventory section of the menu panel.
2. At the Doses Administered screen, choose your organization from the Site drop down list.
3. In the "From" field under Report Date Range, choose a starting date for your report using the MM/DD/YYYY format.
4. In the "To" field under Report Date Range, choose an ending date for your report using the MM/DD/YYYY format.

Notes: Doses administered are listed within this report based on the date the immunization administered, not the date it was entered into IRIS.

5. Press ***Generate Report***.
6. Press ***Refresh*** after a few moments to check the status of your report.

Notes: You're not required to wait at this screen. To return to this screen at a later time, select the **Doses Admin Status** menu item from the inventory section of the menu.

7. Click on the name of your report once it is underlined and displays in blue text.
8. The report displays in Adobe Reader®. If you do not have this installed on your computer, select the **Forms** link at the top of the screen, and the *Get Adobe Reader®* link from there, or contact your administrator.
9. To print the report, press the printer icon on the Adobe® toolbar.
10. Press OK in the Print dialog box.
11. To return to the Doses Administered screen, press the Back button on your browser.

Inventory Counts

Requisite of providers placing orders for VFC funded vaccine, is the completion of an Inventory Court within 14 days prior the placement of the order.

To create an Inventory Count for your organization navigate to the **Inventory Count Listing** screen (see *Inventory Count Listing* section above) and create or complete the already created inventory count from there.

Inventory Count Listing Screen

From this screen a listing of the current and historical inventory counts can be found.

1. Select the **Inventory Count** link from the Inventory section of the menu panel.
2. Select your organization within the *Organization* field.
3. Input the date range and select the **Refresh List** button to view current and historical inventory counts.

    Inventory Count Statuses:

    - **Open:** Inventory count has been saved but has not yet been submitted. For your organizations inventory count records to be considered up-to-date, an inventory count must have a status of *Submitted* within the previous 14 days.

    - **Submitted**: Inventory count has been saved and submitted for processing.

4. To view a historical or current inventory count, select the hyperlink within the *Inventory Count* field associated with the inventory count you intend to view.
5. To create a new inventory count, select the **Enter New Count** button. You are only allowed to enter one count per organization per day.
6. To delete a current or historical inventory count, indicate the inventory count within *Select* field and select the **Delete** button.

Enter Inventory Count

The inventory list includes public funded vaccine lots with remaining inventory on hand. Lots that have expired with inventory since the previous inventory count are included. Duplicate lots (Same NDC /Lot Number/ Expiration Date) can be entered as a combined count. Enter your inventory as a whole number (round down) in the physical count field.

Vaccine lots that will expire within the IRIS expiration alert setting, current set to 90 days, are highlighted in fuchsia. Lots that are expired and/or inactive with remaining inventory on hand are displayed in red font.

Four options exist within the **Inventory Count** screen:

1. Print Screen – to generate a hard copy of the Inventory Count display, select the **Print Screen** button. If the inventory count was not saved, the physical count field will be blank to allow the printed report to be used as a worksheet when gathering counts. If the inventory count is saved, the report will include the physical counts entered.
2. Save – To save any information having been input into the *Physical Count* field, select the **Save** button. When an inventory count has not previously been *Saved & Submitted,* this will set the inventory count's status as *Open*. The inventory count will be considered not yet complete and will not have been sent to the state for processing. Your organizations inventory count records will not be considered up-to-date unless an inventory count has been saved and submitted within the past 14 days.
3. Save & Submit – To save and submit an inventory count, select the **Save & Submit** button. This will designate the inventory count's status as *Submitted* and this inventory count will no longer be editable.
4. Return to List – To return to the previous screen without saving any data, select the **Return to List** button.

<u>To complete your inventory count:</u>

1. Enter the Inventory Count On Date. The date will default to the current system date. The date of which you submit your last inventory count report will be listed as: Last Inventory Count was on: <date>. You may only have one inventory count saved for your organization per date.
2. Input within the *Physical Count* field the current inventory on hand for the associated vaccine lot. You do not need to enter zero if you have no doses remaining for a vaccine lot. The physical count will default to zero if a count was not entered when the Inventory Count is saved.
3. If you are not able to complete the information for all vaccine lots, select the **Save** button.
4. Once your inventory count is complete and ready for processing by the state, select the **Save & Submit** button. After doing so this inventory count will no longer be editable.

Note: You are allowed to save the inventory count in an Open status by selecting the Save button. An inventory count in Open status can still be edited and does not satisfy the supporting documentation requirement for ordering public vaccine. However if you select Save and Submit, the inventory count will be saved in Submitted status and will satisfy the vaccine order supporting documentation requirement. You will no longer be able to modify the inventory count and must contact the IRIS Help Desk if a change is needed.

Manage Orders

The **Manage Order** module is used for the purpose of viewing current and historical orders as well navigating to the Create Order, Modify Order, and View Order screens.

Manage Order Screen

Select the **Manage Order** link from the Inventory section of the menu panel, subsequently the Manage Order Screen will display.

From this screen:

- Select the **Create Order** button to create a new order

  Creation of a new order will require an up-to-date Inventory Count (see *Inventory Count* section above). Verify the vaccine delivery information and delivery hours and special instructions are correct before submitting an order.
- View your organizations VFC profile and VFC related information.

  Select the **Edit Vaccine Delivery Information** button, to update VFC Profile related information.
- View your **Vaccine Delivery Hours and Special Instructions**. Update your current vaccine delivery hours and special instructions. Click Save button to update to Save your changes to vaccine delivery.
- View documentation information required for the ordering process within the Supporting Documentation section.

- View your current and historical orders within the Order List section.

  Statuses include:
  - **Pending:** Order created and submitted for approval. The order has not been viewed by the VFC Program. The Order can still be modified by provider organization.
  - **Canceled** – Order is canceled and closed. Can no longer be modified and is considered historical.
  - **In Progress**: The order is in the process of review by the VFC Program. The order can no longer be modified.
  - **Denied**: Order was denied by VFC Program. The order is closed and considered historical.
  - **Approved**: Order has been reviewed by VFC Program and at least one request for vaccine within was approved. The order can no longer be modified by provider organization.
  - **Sent to CDC**: Order reviewed by VFC Program and at least one request for vaccine within was approved. The order can no longer be modified by provider organization. Order was included within an export to the CDC VTrckS application for processing.

- **Direct Ship** *(historical)*:   Order has been approved by the VFC Program and has been exported to the CDC. This type of order will only include vaccine that will be directly shipped to the provider. Order is now considered historical. This Status is no longer used as of January 4, 2013.
- **Partial Ship**: Part of the approved order has been shipped to the provider organization.   The remaining approved items will be
- **Shipped**:   All approved order items have been shipped to the provider organization.   See information on Inventory Transfers
- **Partially Accepted** – Partial order was shipped by the CDC and the partial order has been accepted by the provider organization. Provider organization's inventory module will reflect the receipt of inventory. Order is now considered historical.
- **Accepted** – Complete order was shipped by the CDC and the complete order has been accepted by the provider organization. Provider organization's inventory module will reflect the receipt of inventory. Order is now considered historical.
- **Rejected** – Order was shipped by the CDC and received by the provider organization; however, the entire order was rejected and the provider organizations inventory module will not reflect the receipt of inventory. Order is now considered historical.

Notes: Indicate whether Historical or Non-Historical orders are to be displayed by the associated radio buttons.

Creating Orders

To create an order, select the **Manage Order** link from the Inventory section of the menu panel and then select the **Create Order** button from the Manage Order screen. Subsequently the Create Order screen will display.

Accessibility to the **Create Order** button requires that Inventory Count and Cold Storage records are up to date.

- Inventory Count – An Inventory Count must have been submitted within 14 days prior the current date. See *Inventory Count* section below.
- Cold Storage Records – Your organizations Cold Storage Records must be up-to-date and have been updated within the past 24 hours. See Chapter 15 of this manual for more information on the management of cold storage records.

Create Order Screen

Upon having selected the **Create Order** button, the Create Order screen will display.

To create your order:

1. Verify information within Create Order section
   - Order Status should be set to ‘Pending’ initially.
   - Order Date should be current date.
   - Submitted By should list your name.
2. Verify information within VFC Profile section.
   - Organization should list your organization.
   - VFC Pin should list your organization’s VFC Pin number.
   - Delivery Address should list the address that the order will be shipped to.
   - Delivery Contact should list your organization’s administrator or main contact, as listed within the Edit Organization screen (see Chapter 6 of this manual).
   - Phone Number should list your organization’s phone number, as listed within the Edit Organization screen (see Chapter 6 of this manual).
   - Facsimile Number should list your organization’s fax number, as listed within the Edit Organization screen (see Chapter 6 of this manual).
   - Email should list organization’s email address, as listed within the Edit Organization screen (see Chapter 6 of this manual).
   - Delivery Days/Hours should list your organizations available dates and times for delivery, as listed within the Edit Organization screen (see Chapter 6 of this manual).
   - Special Instructions should list any special instructions for this order, within the 35 character limit. Special instructions are not order specific.

   Notes: Special Instructions are **NOT** order specific. Alteration of Special Instructions will alter those special instructions for **ALL** other orders.

3. Input any comments that are necessary for this order within the Comments section. Input comment within the text box within this section and within 150 character limit.

   Notes: As opposed to the Special Instructions, the Comments **ARE** order specific. Input of a comment within this field will not impact any other orders or the comments therein.

4. Input the number of doses needed for each vaccine lot within Pediatric/State Supplied Vaccine and Adult/State Supplied Vaccine sections.

   Input the number of doses needed within the # *Doses* column. Doses listed within this field must be an integer multiple of the value listed within *Doses per Package* field, specific to this vaccine lot.

5. To submit the order select the **Save & Submit** button located at the top of the screen. Validation will take place on all fields and where all information input as expected the order will be submitted.
6. Upon submission of the order, the Manage Order screen will display and the newly placed order will be listed within the Order List section with a status of *Pending*.

Notes: To leave this screen without saving the information input, select the **Return to List** button, or select any of the links within the menu panel or located at the top of the screen.

Modifying Orders

To modify an existing order select the **Manage Order** link from the Inventory section of the menu panel.

Notes: Only orders of a *Pending* status are able to be modified. Those of any other status cannot be modified and can only be viewed.

Select the hyperlink associated to any order under a *Pending* status. Subsequently the **Modify Order** screen will display.

- Edit the # *Doses* as you would when creating an order.
- To remove a vaccine from the order, simply check the checkbox within the *Remove* column.
- Upon selecting **Save & Submit** the doses ordered will be updated and all vaccines flagged for removal will be removed.
- To cancel an order entirely, select the **Cancel Order** button.
- To navigate to the previous screen without making changes, select the **Return to List** button.

Viewing Orders

To view an existing or historical order select the **Manage Order** link from the Inventory section of the menu panel and then select the associated hyperlink of an order from the Order List section. Subsequently the **View Order** screen will display.

1. Select the **Return to List** button to return to previous page.
2. Select the **Print** button to generate a hard copy of the order.

Mange Vaccine Inventory Transfers

IRIS allows you to transfer vaccines between sites within your organization or between two organizations. There are three types of transfers:

- ***Transfer:*** Doses from nonexpired vaccine lots are transferred from one IRIS organization to another.
- ***Order:*** Vaccine orders that have been shipped are transferred from the IDHW/McKesson site to the provider organization. Public funded vaccine only.
- ***Return:*** Return Request has been exported to VTrckS and can be transferred from the provider organization to the IDHW/McKesson site. Public funded vaccine only.

If a transfer was created from an Order shipment, the Type field 'Order' will be a hyperlink to the original Order request.

If a transfer was created from a Return Request, the Type field 'Return < IRIS W/R ID>' type will be a hyperlink to the original Return Request.

All transfers in Pending Approval, Outbound Inbound and Historical tabs will be displayed by default.

The Manage Transfer screen has four detail tabs:

- ***Pending Approval:*** Displays transfers between IRIS organizations that are outbound from your organization that are pending Idaho Vaccine Program approval.
- ***Outbound:*** Displays transfers that are outbound from your organization that have been approved by the Idaho Vaccine Program.
- ***Inbound:*** Displays transfers that are inbound to your organization
- ***Historical:*** Displays completed/historical transfers. You can enter a date range to filter viewing historic transfers if needed.

Manage Transfer Detail Expanded Viewing

Clicking on the **+** in the left most column of the manage transfer list will expand for a detail view of the transfer. The expanded view will allow you to see

- Vaccine lots and transfer quantities
- Rejection reasons (if any)
- Audit record of changes to a Return Type transfer made by the Idaho Vaccine Program due to inventory discrepancies.
  - To view a reason for a Return type transfer cancelation, however over the status field for a Canceled* status.

Search Criteria

The Manage Transfer screen has a search criteria that is used to filter the Manage Transfer list.

- **Date Created**: This field is used to filter historical transfers. Select options from the drop-down list to filter transfers when you are on the historical tab.
- **Date Range:** This field is used to filter historical transfers. Select options from the drop-down list to filter transfers when you are on the historical tab.
- **Org Name:** This filter applies to all detail tabs. Select transfers that include selected IRIS Organization name.
- **Org ID:** This filter applies to all detail tabs. Select transfers that include selected IRIS Organization ID.
- **VFC PIN:** This filter applies to all detail tabs. Select transfers that include selected IRIS VFC PIN.
- **Specialty PIN:** This filter applies to all detail tabs. Select transfers that include selected IRIS Specialty PIN.
- **Transfer Type:** This filter applies to all detail tabs. Select transfers of a specific transfer type (Transfer, Order or Return).
- **Vaccine Group:** This filter applies to all detail tabs. Select transfers that include selected Vaccine Group.

IMPORTANT: If any vaccines have been damaged during the transfer, please contact the Idaho Immunization Program at (208)334-5931 or iip@dhw.idaho.gov.

You are not allowed to reject transfers from the Idaho Department of Health and Welfare (IDHW) or the Idaho Immunization Program.

Creating Transfer Type Transfer

To create a new transfer from your organization to another IRIS organization:

1. Click **Manage Transfers** under the Inventory section of the menu panel.
2. Click the **New Transfer** header tab.
3. Enter the following information:
    a. Receiving Organization to which you are transferring the vaccine to
    b. Public funded vaccine lots are displayed by default. Check Private inventory if the transferred doses are from private funding. Note that public and private funded lots cannot be included on the same transfer.
    c. Number of doses of active inventory in the Transfer Quantity field for each of the trade names being transferred
4. Click the **Save** button. The "**Saved transfer <IRIS transfer id>"** message will display. In addition the following message will display:

    " Vaccine transfers cannot be shipped until they are approved by the Idaho Immunization Program. After the approval email has been received, the vaccine may be physically transported and the IRIS transfer may be shipped."

5. Transfers will be listed in Pending Approval tab until the transfer is approved. Approved transfers are listed in Outbound tab. Denied transfers are in historical tab.

Editing Transfer Type Transfer

To create a new transfer from your organization to another IRIS organization:

1. Click **Manage Transfers** under the Inventory section of the menu panel.
2. Click the **Pending Approval or Outbound** detail tab.
3. Click the Edit Icon next to the transfer you want to edit.
    a. Enter the following information:
        i. Modify the transfer quantity on a selected vaccine lot
        ii. Add Vaccine Lots to transfer
        iii. Remove Vaccine Lots from transfer
        iv. Cancel the transfer
4. Click the **Save** button. The "**Saved transfer <IRIS transfer id>"** message will display.
5. Edited Transfers will be listed in Pending Approval tab until the transfer is approved again. Approved transfers are listed in Outbound tab. Denied and Canceled transfers are listed in historical tab.

Shipping Transfer Type Transfer

Once a transfer is approved, the Medical Director or Equivalent, Primary Vaccine Coordinator and Backup Vaccine Coordinator will receive a transfer approval email .   At this point you can proceed with shipping the transfer. The transfer will appear in the Outbound tab in “Approved” status.

1. Click **Manage Transfers** under the Inventory section of the menu panel.
2. In the Outbound Transfer section, locate the transfer you want to view and make sure that the corresponding Type column states “Transfer” and status is “Approved.”.   A packing list must be generated before you can ship the transfer.
3. Click the Packing List icon to generate the packing list. The button will be yellow if the packing list has never been generated and blue once the packing list has been generated at least once.   Print the packing list to include with the shipment.
6. Click the **Ship** icon will be blue after the packing list is generated and you are able to ship the vaccines.
7. On the Ship Transfer popup screen, enter the **Ship Date**. Either use today’s date or enter an alternate date in MM/DD/YYYY format. The **Ship Date** can be up to 30 days in the past and up to 7 days in the future.
8. Click the **Ship** button. The “**Shipped transfer <IRIS Transfer ID>”** message will display. The transfer will remain Outbound Transfer list in Shipped status, where it will remain until it is accepted by the receiving site/organization.
9. Click the **X** button in the upper right corner to close the Ship Transfer popup screen to the Manage Transfers page.
10. You can view this inventory deduction ‘Doses Transferred” by going to the Show Transaction screen and preparing a Transaction Report.

Shipping Return Type Transfer

After a vaccine Return Request (via manage wastage and returns) has been exported to VTrckS by the Idaho Vaccine Program, a Return type transfer will be posted on the Manage Transfer screen with status of “Sent to CDC”.

To ship a Return Transfer once you have received the return shipping label from the CDC:

1. On the **Manage Transfers** screen, locate a Return Transfer in the Outbound Transfer section. Make sure the Type column states “Return <IRIS WR ID>” is in the Type column. The Status must be “Label Sent” for a return transfer to be ready to ship.   The following message will display
2. Click the **Packing List** icon to generate the packing list. The button will be yellow if the packing list has never been generated and blue once the packing list has been generated at least once.   Print the packing list to include with the shipment.
3. Click the hyperlinked **Ship** icon field.

4. On the **Ship Transfer** popup screen, verify the match VTrckS Return ID value matches your shipping label Verify the Return transfer information is correct.

   “**For inventory discrepancies within a return with LABEL SENT status, please email the Idaho Immunization Program at IIP@dhw.idaho.gov. Please include the organization name, pin number, and IRIS return ID**.”

5. If the Return transfer information is correct, enter the Ship Date. Either use today’s date or enter an alternate date in MM/DD/YYYY format. The Ship Date can be up to 30 days in the past and up to 7 days in the future
6. Click the **Ship** button. The “**Shipped transfer <IRIS Transfer ID>”** message will display. The Return type transfer will be listed in the historical tab.
7. Click the **X** button in the upper right corner to close the Ship Transfer popup screen to the Manage Transfers page.
8. Return Transfers are auto-accepted/historical after being shipped and the number of doses returned to the distributor is automatically deducted from inventory. You can view this inventory deduction ‘Doses Returned to Distributor” by going to the **Show Transaction** screen and preparing a Transaction Report.

Accepting or Rejecting Transfers

Transfers made through IRIS and received by the provider organization must be accepted, rejected or partially accepted so that IRIS can post and track inventory properly. To accept or reject a transfer:

1. Click **Manage Transfers** under the Inventory section of the menu panel.
2. In the Inbound Transfer section, locate the transfer received by your organization and make sure that the corresponding Type column states “Transfer”.
3. Click the hyperlinked **Receive** icon. The Receive transfer popup screen will display.

   “If vaccines are damaged during transfer, then please complete a vaccine wastage/return as appropriate. See Manage Vaccine Wastage and Returns in IRIS.”

4. On the Receive Transfer screen, enter a **Receive Date**. The **Receive Date** is the date when you actually received the vaccine (or acknowledging no receipt), and it needs to be after the **Ship Date** of the transfer.

Accept Transfer

1. On the Receive Transfer screen, the Accept All radio button is selected by default. Click the **Save** button to accept the transfer and add all transfer items into inventory. The “**Saved transfer <IRIS Transfer ID>”** message will display. The transfer will be listed in the historical tab.
2. Click the **X** button in the upper right corner to close the Receive Transfer popup screen to the Manage Transfers page.

3. You can view this inventory addition 'Receipt of Inventory" by going to the **Show Transaction** screen and preparing a Transaction Report.

Notes: **IMPORTANT:** If any vaccines have been damaged during the transfer, please contact the Idaho Immunization Program at (208)334-5931 or iip@dhw.idaho.gov.

You are not allowed to reject orders or transfers from the Idaho Department of Health and Welfare (IDHW) or Idaho Immunization Program.

Partially Accept Transfer

1. On the Receive Transfer popup screen, click the **Partially Accept** radio button.
2. For each transfer item, select the dose quantity of you wish to accept and a rejection reason for those you wish to reject.
   - Not Ordered or Never Received.
3. Click the **Save** button to accept the transfer and add all transfer items into inventory. The "**Saved transfer <IRIS Transfer ID>"** will display on the page.
   - If Never Received is selected, you can proceed with step 7.
   - If Not Ordered is selected, the following popup message will display

     "This transfer has rejected items that must be returned. Please print a return packing list, set the return ship date, and save this transfer again."

4. Enter a Return Date that is on or after the Receive Date.
5. Generate the Packing List. Once the Return Date is entered and Packing List has been generated you will be able to Ship.
6. Click Ship button to ship the transfer and add all transfer items into inventory. The "**Saved transfer <IRIS Transfer ID>"** will display on the page.
7. Click the **X** button in the upper right corner to close the Receive Transfer popup screen to the Manage Transfers page.
8. The transfer will appear with Shipped* status in your inbound transfer list. The original Sending Organization must Restock the rejected doses to complete the transfer.
   - If the Inbound transfer is in Partial_Accepted or Rejected status it means you still need to ship the rejected doses. (Review starting at step 1)

Reject Transfer

1. On the Receive Transfer popup screen, select the **Reject Transfer** radio button to reject the entire transfer.
2. Select a reason in the Enter Rejection Reason drop-down list:
    - Not Ordered or Never Received.
3. Click the **Save** button to accept the transfer and add all transfer items into inventory. The "**Saved transfer <IRIS Transfer ID>"** will display on the page. :
    - If Never Received is selected, you can proceed with step 7.
    - If Not Ordered is selected, the following popup message will display

      "This transfer has rejected items that must be returned. Please print a return packing list, set the return ship date, and save this transfer again."

4. Enter a Return Date that is on or after the Receive Date:
5. Generate the Packing List. Once the Return Date is entered and Packing List has been generated you will be able to Ship.
6. Click Ship button to ship the transfer and add all transfer items into inventory. The "**Saved transfer <IRIS Transfer ID>"** will display on the page.
7. Click the **X** button in the upper right corner to close the Receive Transfer popup screen to the Manage Transfers page.
8. The transfer will appear with Shipped* status in your inbound transfer list. The original Sending Organization must Restock the rejected doses to complete the transfer.
    - If the Inbound transfer is in Partial_Accepted or Rejected status it means you still need to ship the rejected doses. (Review starting at step 1).

Restocking Transfers

When a transfer has been rejected it is necessary to ship and restock the transfer in the system so that the doses are correctly reported in inventory.

Restocking a Rejected or Partially Accepted Transfer

If you are the original sender of a transfer, and the receiving organization has rejected the shipment and shipped it back to you for any reason, you will need to restock the rejected quantities in the system. To do this, follow these steps:

1. Click **Manage Transfers** under the Inventory section of the menu panel.
2. On the Outbound tab, click the Restock icon of the rejected transfer in **Shipped*** status..
3. On the Restock popup screen, enter a Restock Date that is on or after the Return Date.

4. Click the **Restock** button to restock the doses in inventory. The "**Saved transfer <IRIS Transfer ID>**" will display on the page. The transfer is now Complete status and is historical.
5. Click the **X** button in the upper right corner to close the Receive Transfer popup screen to the Manage Transfers page.
6. You can view this inventory addition 'Doses Restocked" by going to the **Show Transaction** screen and preparing a Transaction Report.

Viewing Packing Lists

If an organization has sent a transfer, you can view and print the packing list for it. You can also view the packing list for historical transfers:

1. Click **Manage Transfers** under the Inventory section of the menu panel.
2. In the Inbound Transfer or Historical Transfer section, locate the transfer you want to view and make sure that the corresponding Type column states "Transfer". Click the hyperlinked **Create Date** field.
3. On the Receive Transfer or View Transfer screen, click the Packing List button. Print the packing list, if desired.

Manage Transfer Detail Expanded Viewing

Clicking on the **+** in the left most column of the manage transfer list will expand for a detail view of the transfer. The expanded view will allow you to see

- Vaccine lots and transfer quantities
- Rejection reasons (if any)
- Audit record of changes to a Return Type transfer by the Idaho Vaccine Program.

Managing Wastage and Returns

Idaho Vaccines for Children (VFC) providers must report all instances of state-supplied non-viable vaccines to the Idaho Immunization Program (IIP). There are two types of non-viable vaccine loss:

- **Vaccine Return** (Expired or Spoiled Vaccine): Non-viable vaccines that are returned to McKesson Specialty, such as expired vaccine or vaccines that have been compromised in a storage and handling (temperature) incident. Most non-viable vaccines need to be returned to McKesson Specialty for federal excise tax credit;

- **Vaccine Wastage** (Wasted Vaccine): Non-viable vaccines that cannot be returned to McKesson Specialty. The following wasted vaccine products should not be returned to McKesson Specialty and should be disposed of properly:
  - Broken vial/syringe
  - Vaccine drawn up into syringe but not administered

- Lost or unaccounted for vaccine
    - Non-vaccine products (e.g. IG, HBIG, diluent)
    - Open vial but all the doses have not been administered

In the past, Wastage and Return processes were managed through paper forms. However, IRIS now has an online Wastage and Returns module that eliminates the need for paperwork. This functionality enables VTrckS to stay in sync with IRIS regarding wastage and returns for public-funded vaccines.

Wastage and Returns processes are similar to vaccine ordering processes in IRIS:

- Through the Create a Request screen, a provider (or a state-level user not logged in to the Idaho Department of Health and Welfare (IDHW) organization) submits a request to return or record wastage of public-funded vaccines.
- Through the Review a Request screen, a state-level user modifies, approves or denies a wastage or return request. The state-level user also lists what type of shipping label is used (email, mail or pickup) and the number of boxes needed to return the vaccines.
- Through the VTrckS Export Requests screen, a state-level user requests a data exchange export job of approved wastage and return requests that the VFC Program can upload into the CDC VTrckS system.
- Through the Import of VTrckS Returns or Shipment Data screen, a state-level user keeps track of the import status of return requests. (If a return Request has a VTrckS Return ID, the import was successful.)

An approved wastage request is processed differently from an approved return request:

- When an approved wastage Request is exported, IRIS subtracts the approved wastage doses from the provider organization vaccine inventory and records a 'Doses Wasted' vaccine lot transaction.
- When an approved return request is exported, a return type transfer displays on the Manage Transfer screen.
    - A transfer from the provider organization to IDHW/McKesson can occur after the VTrckS Return ID appears on the Ship Transfer screen
    - The return type transfer allows the provider organization to record the actual ship date of the return after the VTrckS Return ID appears.
    - After the Ship Transfer has occurred, doses are removed from the provider organization vaccine inventory and a 'Doses Returned to Distributor' vaccine lot transaction is recorded.

IMPORTANT: The Manage Wastage and Returns module processes wastage and return requests only for public-funded inventory. Wastage and return deductions for private-funded inventory are recorded through the Manage Inventory module.

Manage Wastage and Returns

The **Manage Wastage and Returns** screen is used for the purpose of viewing current and historical wastage and returns requests of public-funded inventory as well navigating to the Create a Request, Modify a Request, Review a Request and View a Request screens.

Select the **Manage Wastage and Returns** link from the Inventory section of the menu panel, subsequently the Manage Wastage and Returns screen will display.

	This Insufficient Inventory icon will appear next to the Status hyperlink if the Quantity on Hand for a vaccine in a Request is less than the quantity to be returned/wasted. A Request will not be exported to VTrckS if the Approved Quantity is greater than the Quantity on Hand.

<u>From this screen:</u>

- Select the **Create a Wastage or Return Request** button to create a new request to return a vaccine or record a wastage
- View your organization's VFC profile and VFC related information.

  If you are a state-level user, you can click the ***Edit Organization*** *link on the Manage Access/Account screen to update VFC Profile related information.*

- If the Insufficient Inventory icon appears:
  - For an In Progress Request, check the Quantity to be Returned/Wasted for each vaccine and compare it to the Quantity on Hand on the Manage Inventory screen.
  - For an Approved Request, check the Approved Quantity for each vaccine and compare it to the Quantity on Hand on the Manage Inventory screen.
  - You can resolve the quantity issue by or changing the Quantity to be Returned/Wasted on the Review a Request updating the Quantity on Hand on the Edit Inventory screen
  - A Request will not be exported to VTrckS if it has one or more vaccines with insufficient inventory.
- View your current and historical requests within the Wastage and Returns List section.

  <u>Statuses include:</u>

  - **Pending:** Request created and submitted for approval. The Request has not been viewed by the IDHW organization and can be modified by the provider organization. A Pending Request is a current request.
  - **Canceled**: Request is canceled and closed. A Canceled Request is a historical request. It cannot be modified and it will not be included in a

Wastage or Return export. Requests canceled by the provider will not display on the IDHW organization's Manage Wastage and Returns list.

- **In Progress**: Request has been received and is under review by the IDHW organization. The Request can no longer be modified by the provider organization. The IDHW organization can update, approve or deny an In Progress Request. The Request will remain IN PROGRESS if the IDHW organization has clicked the Save button but will move to the APPROVED status if IDHW has clicked the Submit & Save button. An In Progress Request is a current request.
- **Denied**: Request was denied by the IDHW organization. A Denied Request is a historical request and will not be included in a Wastage or Return export.
- **Approved**: At least one vaccine item in the Request has been approved by the IDHW organization. An Approved Request is a current request. It can be modified and it will be included in the next Wastage or Return export file.
- **Sent to CDC**: Approved Return Request items have been included in a return export file and sent to the CDC. A Sent to CDC Request is a current request and cannot be modified. Only Return Requests are put into the Sent to CDC Status.
- **Label Sent:** A VTrckS Return ID has been entered into a Return Request in the Sent to CDC status. After the Return Request has been transferred, the status will change to Complete. Only Return Requests are put into the Label Sent Status. A Label Sent Request is a current request.
- **Complete:** Approved Request Items have successfully exported to the CDC and processed by IRIS. A Complete Request is a historical request.
    - For Approved Wastage Request items, the COMPLETE status indicates that the following has occurred:
        - Approved Wastage Request items have been included in a Wastage export file and sent to the CDC.
        - Doses Wasted have been subtracted from the provider organization's inventory. (See the View Transaction section for information on viewing Doses Wasted transactions.)
    - For Approved Return Request items, the COMPLETE status indicates that the following has occurred:
        - An inventory transfer has been created during the export process.
        - The provider organization has shipped the Return vaccines to IDHW/McKesson after receiving the VTrckS Return ID and Return Label.
        - IDHW/McKesson auto-accepted the transfer.
        - Doses Returned to Distributor have been subtracted from the provider organization's inventory. (See the View

Transaction section for information on viewing Doses Returned to Distributor transactions.)

Creating a Wastage or Return Request

To create a wastage or return request, select the **Manage Wastage and Returns** link from the Inventory section of the menu panel and then click the **Create a Wastage or Return** button on the Manage Wastage and Returns screen.

To create a Wastage or Return Request:

7. Verify all the information in the Create a Request-Funding Source Public section.
    - Status should be set to ‘Pending’.
    - Submit Date should be current date.
    - Submitted By should list your name.
    - Phone Number should list your phone number.
    - Email should list your email address.
8. Verify all the information within VFC Profile section. The information on the VFC Profile screen is identical to the information on the List Organization screen. (See Chapter 6 for more information on the Edit and List Organization screens.)
    - Organization should list the name of your organization.
    - VFC PIN should list your organization’s VFC PIN number.
    - Address should list the address of your organization
    - Contact Person should list your organization’s administrator or main contact.
    - Phone Number should list your organization’s phone number.
    - Email should list your organization’s email address.
9. Fill in the following fields in the Wastage/Return Information section:
    - Click either the Record a Wastage or Request a Return radio button.
    - If you click the Record a Wastage button:
        - The screen will turn light blue and the Vaccine Wastage table will appear.
        - You must fill in the Transaction Date field. The Transaction Date is the actual date when the vaccine wastage was processed.
        - You must select an option from the Detail dropdown. If you select the ‘Other’ option, you must fill in the Explanation field.
    - If you click the Request a Return button:
        - The screen will turn light brown and the Vaccine Return table will appear.
        - You must select an option from the Return Type dropdown – either Return Only or Replacement.
        - You must select an option from the Detail dropdown. If you select the ‘Other’ option, you must fill in the Explanation field.
10. Fill in the Quantity to be Returned or Quantity to be Wasted field for at least one vaccine in the Vaccine Return or Wastage table:

- The “Show” radio buttons on the right side of table enable you to view your organization’s Active, Inactive, Expired vaccines.
  - If you select the ‘All’ radio button, you can view the Active, Inactive and Expired vaccines together.
  - The default Vaccine Return table contains Inactive vaccines. The default Vaccine Wastage table contains Active vaccines.
  - Inactive and Expired vaccines are listed in red.

11. To submit the Request, select the **Save & Submit** button located at the top of the screen.
12. After the Request has been successfully submitted, the Manage Wastage and Returns screen will display and the newly placed Request will be listed in *Pending* status in the Wastage and Returns List section.

IMPORTANT: After a newly created Request has been saved and submitted, you cannot change it from a Wastage Request to a Return Request – or vice versa.

To return to the Manage Wastage and Returns screen without saving a Request, select the **Return to List** button.

Modifying a Request

To modify an existing Request, select the **Manage Wastage and Returns** link from the Inventory section of the menu panel. In the Wastage and Returns List on the Manage Wastage and Returns screen, click the hyperlink for any Request in the *Pending* status. Subsequently, the **Modify a Request** screen will display.

<u>From this screen:</u>

- The Record a Wastage and Request a Return radio buttons are inactive. However, you can update the Transaction Date field and Detail dropdown for a wastage Request and the Return Type and Detail dropdowns for a return Request.
- You can fill in the Quantity to be Returned or Quantity to be Wasted fields as you would when creating a Request.
- You can update the Quantity to be Returned or Quantity to be Wasted fields in the Vaccines Requested table.
- You can remove a vaccine from the Vaccines Requested table by checking the checkbox in the *Remove* column.
- After you select the **Save & Submit** button, the Vaccines Requested table will be updated and all vaccines flagged for removal will be removed.
- You can click the **Cancel Request** button to cancel a Request.
- You can click the **Return to List** button to return to the **Manage Wastage and Returns** screen without saving a Request.

NOTE: The **Modify a Request** screen displays only for a Wastage or Return Request in the Pending status.

If all the checkboxes have been checked in the Remove column and no vaccines have been selected in the Vaccine table, an error message will appear after you select the **Save & Submit** button.

Viewing a Request

To view an existing or historical Request, select the **Manage Wastage and Returns** link from the Inventory section of the menu panel and then, click the hyperlinked Request from the Wastage and Returns List. Subsequently, the **View a Request** screen will display.

From this screen:

- You can view the latest information about a wastage or return Request. The View a Request screen is read-only.
- The Waste/Return Information section lists whether the state-level user auto-approved the vaccine list in the Request and it shows comments from both the provider and state-level user.
- If the Return Transfer that has been modified for a Return request, the following text will appear at the top of the View Request screen:

  "**The approved quantity has been changed after the return was approved by the Idaho Immunization Program. For details about what change was made and why, please refer to the RETURN on the Outbound tab of Manage Transfers. Please refer to the Manage IRIS Transfers or Manage IRIS Wastage and Returns guidance for additional information.**"

  The Request List section provides details about all the vaccines that the provider requested to be returned or wasted. In addition to listing such vaccine details as the NDC and expiration date, the Request List section contains this information:

  a. *Quantity to be Returned/Wasted*: Number of doses that a provider wanted to return to distributor or record as wastage
  b. *Approved Quantity:* Number of doses that were approved for return or wastage.
  c. *Denied Quantity:* Number of doses that the approver decided not to return or record as wastage. If any requested vaccine doses were denied, the Deny Comments will be listed. Deny Comments list the reasons why the requested doses were not approved for return or wastage.

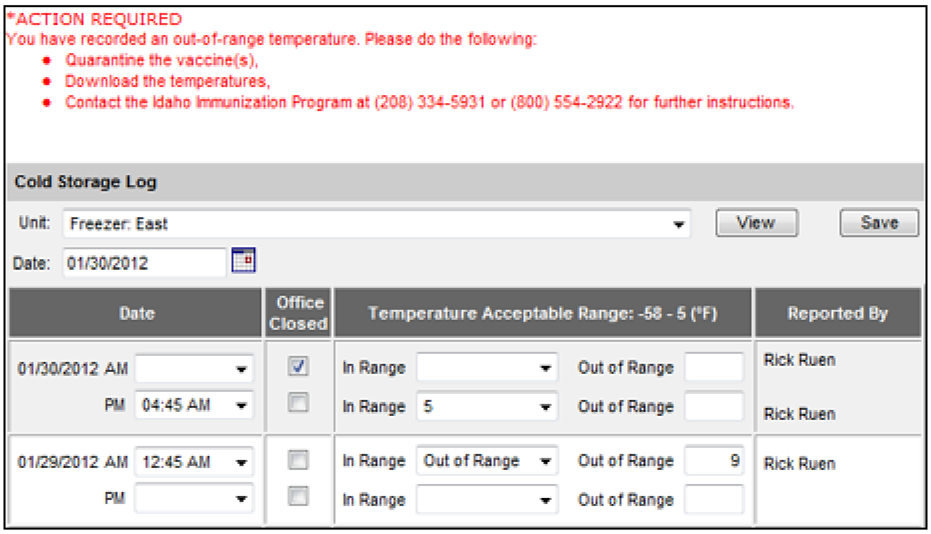
- You can click the **Return to List** button to return to the Manage Wastage and Return screen.

Recording Cold Storage Temperatures

Record Cold Storage Screen

The **Record Cold Storage** module is for the purpose of recording and logging cold storage temperatures. Select **Record Cold Storage** from the Inventory section of the menu panel. Subsequently Figure 2A will display.

Figure 2A – Record Cold Storage Screen



From this Screen:

- Select which Cold Storage Unit's records are to be viewed or updated.
- Select the date of the records to view.
  - The Date listed and six days prior worth of records will be displayed at any one time.
- Select the **View** button and the cold storage unit's records for the date indicated will be displayed.
- Update the cold storage records as necessary and select the **Save** button.

Configuration Fields

Unit: Drop down list of all cold storage units contained within your organization.

Date: Input date in MM/DD/YYYY format.

View: Select view to display the records for the date and unit displayed.

Save: Saves the records currently displayed.

Table Fields

Date:	Drop list containing 24-hour time span within 15-minute increments.
Office Closed:	Check box to indicate the office as being closed.
Temperature Range In Range Field:	Drop down list of acceptable temperature ranges, as well as *Out of Range* string.
Temperature Range Out of Range Field:	Text box for the input of out-of-range temperatures. Whole numbers only acceptable.
Reported By:	Record of the most recent user to update that specific record.

Acceptable Temperature Ranges

Refrigerator:	36 to 46 (°F)
Freezer:	-58 to 5 (°F)

Functionality:

Four types of records exist:

1. Office Closed – All other fields must be blank.
2. In Range Temperature – Time must be indicated. Office closed and Out of Range must be blank.
3. Out of Range Temperature – Time must be indicated. Office closed must be "unchecked." In Range Temperature field must have *Out of Range* string selected. Whole number must be listed within Out of Range Temperature field.

Note: If an out of range temperature is input and saved, the first time this record is saved, Out of Range Instructions will display, that must be followed. If this record is ever edited and remains out of range, the records will again display.

4. All fields blank – If a record was pre-existing, all fields can be "blanked" and saved. The reported by user will update with user having "blanked" record

Vaccine Prebooking

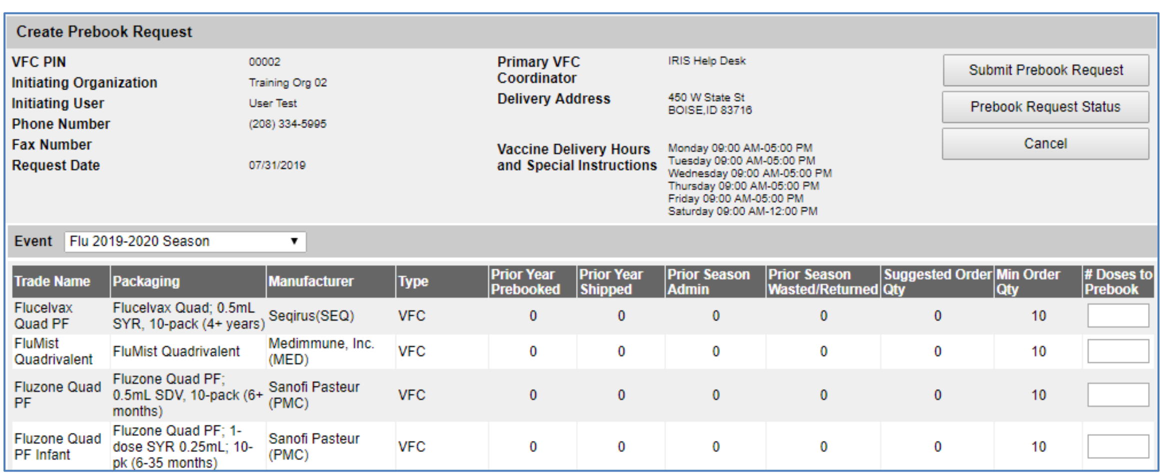
The IRIS application now could create seasonal influenza vaccine requests online. The list below defines the major steps of the seasonal vaccine prebooking and utilization of the same.

1. IIP creates a prebook event with placeholder NDCs for seasonal vaccines that will be made available for the next season.
2. Providers create prebookings based on the prior year’s seasonal vaccine usage.
3. IIP allocates vaccines when they become available in the late summer/autumn.
4. Provider’s request vaccines against their allocation. This automatically creates vaccine orders which are then approved by IIP.
5. Provider receives the vaccine order

Create Prebookings

To create prebookings, the provider must be VFC active with a Primary VFC Coordinator contact. The organization must also have a vaccine delivery address and vaccine delivery window set before they can create prebookings. The organization must also be added to the event before they can see it in the Create/Mange prebooking Event drop down list.

To create a Prebooking, click the link ‘Create Prebookings’ under **Inventory** and select the event for which prebookings need to be created. After the event is selected, a list of all available vaccines for that evet are displayed.


Create Prebook Request
VFC PIN 00002
Initiating Organization Training Org 02
Initiating User User Test
Phone Number (208) 334-5995
Fax Number
Request Date 07/31/2019
Primary VFC Coordinator IRIS Help Desk
Delivery Address 450 W State St BOISE,ID 83716
Vaccine Delivery Hours and Special Instructions Monday 09:00 AM-05:00 PM Tuesday 09:00 AM-05:00 PM Wednesday 09:00 AM-05:00 PM Thursday 09:00 AM-05:00 PM Friday 09:00 AM-05:00 PM Saturday 09:00 AM-12:00 PM
Submit Prebook Request
Prebook Request Status
Cancel
Event Flu 2019-2020 Season

Trade Name	Packaging	Manufacturer	Type	Prior Year Prebooked	Prior Year Shipped	Prior Season Admin	Prior Season Wasted/Returned	Suggested Order Qty	Min Order Qty	# Doses to Prebook
Flucelvax Quad PF	Flucelvax Quad; 0.5mL SYR, 10-pack (4+ years)	Seqirus(SEQ)	VFC	0	0	0	0	0	10	
FluMist Quadrivalent	FluMist Quadrivalent	Medimmune, Inc. (MED)	VFC	0	0	0	0	0	10	
Fluzone Quad PF	Fluzone Quad PF; 0.5mL SDV, 10-pack (6+ months)	Sanofi Pasteur (PMC)	VFC	0	0	0	0	0	10	
Fluzone Quad PF Infant	Fluzone Quad PF; 1-dose SYR 0.25mL; 10-pk (6-35 months)	Sanofi Pasteur (PMC)	VFC	0	0	0	0	0	10	

Enter the quantity for each vaccine you want to prebook in '# Doses to Prebook' field and click 'Submit Prebook Request' button. The user is redirected to 'Prebook Request Status' screen where the status of all prebookings by the provider are listed. The '# Doses to Prebook' field accept numbers between 1 and 9999 and it must be in multiples of 'Min Order Qty'.

Prebook Request Status

The Prebook Request Status screen lists all the prebookings created by the provider for the event selected.

To view the prebook status, click the 'Manage Prebookings' under **Inventory** and the prebookings for the latest event will be displayed with its statuses. The 'Prebook Status' column will have one of the statuses described under section **Prebook Statuses** above.

Columns 'Total Allocated', 'Total Requested' and 'Declined and Returned to Pool' are hyperlinks and will display the history of transactions with additional information for the respective columns.

Prebook Request Status

Take doses from current prebook allocation...	Request Vaccine
Change previously Prebooked vaccine amounts...	Edit Prebook Request
Return to the previous screen...	Cancel

Prebook Request List

Event: Flu 2019-2020 Season

Select	Trade Name	Packaging	Manufacturer	Type	Initiating User	Prebook Date	Prebook Status	Total Prebooked	Total Allocated	Total Requested	Declined and Returned to Pool	Available Now
☐	FluMist Quadrivalent	FluMist Quadrivalent	Medimmune, Inc. (MED)	VFC	Mari Hilleman	07/15/2019	Prebooked	500	0	0	0	0
☐	Fluzone Quad PF	Fluzone Quad PF; 0.5mL SDV, 10-pack (6+ months)	Sanofi Pasteur (PMC)	VFC	Mari Hilleman	07/08/2019	Allocated	100	100	0	0	100
☐	Fluzone Quad PF Infant	Fluzone Quad PF; 1-dose SYR 0.25mL; 10-pk (6-35 months)	Sanofi Pasteur (PMC)	VFC	Mari Hilleman	07/08/2019	Prebooked	40	0	0	0	0

Prebooking Statuses

Vaccine Prebookings moves through a series of statuses and can be in one of the below statuses at any point. The status of a prebook can be viewed using the 'Manage Prebookings' link after selecting the prebooking event.

- **Prebooked:** When a prebook request is created within the start and end date of a prebook event

- **Late:** When a prebook request is created outside the start and end date of a prebook event
- **Cancelled:** When a provider cancelled the prebook request
- **Allocated:** When IIP allocated prebooked quantity
- **Substitution:** When IIP allocated a prebooking with a substitute vaccine
- **Declined:** When provider declined the allocation or part of an allocation. When an allocation is not requested before the auto-return number of days set in IRIS.
- **Shipped:** When IIP approved the orders for all the prebooked quantities
- **Delivered:** When the provider accepts the shipment of the order transfer

Note 1: For statuses '**Allocated**', '**Shipped**', and '**Delivered**', the Prebook status will be '**Prebooked**' or '**Late**' until **ALL** the quantities of that prebooking are '**Allocated**', '**Shipped**', or '**Delivered**'.

Note 2: Prebooking status will be set to '**Declined**' only if none of the allocation is requested or none of the prebooking is allocated. In all other cases, the original status is kept unchanged.

Note 3: The auto-return number of days threshold can be set at NDC level or Prebooking event level. If the allocation is not requested (or Held) within the number of days after it has been allocated, the allocation will be returned to State Pool for re-allocation.

Edit Prebooking

The prebook requests can be modified or cancelled before they are fully allocated by IIP. To modify or cancel a prebooking, click 'Manage Prebookings', select the check box against the prebooking which is in 'Prebooked' or 'Late' status and click 'Edit Prebook Request'.

To modify the quantity of a previous prebooking or to delete a prebooking, click 'enter the new quantity in 'Change Doses Prebooked To:' column and click 'Submit Updates'.

- If the new quantity is more than what was previously prebooked, a new prebook request will be created for the additional quantity. The prebook request will be added at the end of the prebook queue.

- If the new quantity is less than what was previously prebooked, the prebooking is updated with the new quantity
- If the new quantity is 0, then the prebooking is cancelled and no further changes are allowed for this prebooking

To Delete all the prebookings selected, click the ‘Delete Prebook Request’. Upon confirmation, all the prebookings displayed in the Modify Prebook Request screen will be cancelled and no further changes are allowed for these cancelled prebookings.

Request Vaccine from Prebooking

To request/order vaccines from a prebook request, the provider must be VFC active with a Primary VFC Coordinator contact. The organization must also have a vaccine delivery address and vaccine delivery window set before they can create prebookings.

Once the prebookings are partially or completely allocated by IIP, providers can request vaccines against those allocations. These vaccine requests will automatically create a vaccine order.

Note: The vaccine orders created automatically as part of prebook vaccine requests cannot be modified by the providers as regular vaccine orders.

To request vaccines, click ‘Manage Prebookings’, select the check box against the prebookings which are in ‘Prebooked’, ‘Late’, or ‘Allocated’ status with ‘Available now’ > 0 and click ‘Request Vaccine’.

The Request Vaccine screen has the following options:

Submit:

When clicked, the vaccine requests are submitted creating automatic vaccine orders. If the ‘# Doses’ requested is less than ‘Current Doses Allocated’, a pop-up will offer options to

- Accept and Hold Remaining – An automatic vaccine order is created for the ‘# Doses’ requested. The remaining dosed not requested will be help for the provider. It can be requested at a later point in time. This will also reset the auto-return calculation logic to use the system date as the allocation date instead of the original allocation date.

- Accept and Decline Remaining – The An automatic vaccine order is created for the '# Doses' requested. The remaining dosed not requested will be returned to State for reallocation
- Cancel – No changes are done, and the user can make changes again for the vaccine request

Warning: If the allocations are declined by the provider, all the prebookings for the same vaccine (NDC) are also returned to State for re-allocation.

Accept All:

When clicked, the vaccine requests are submitted with number of doses that are allocated but not yet requested, creating automatic vaccine orders.

Hold All:

When clicked, the allocations are held for the provider, which can be requested at a later point in time. This will also reset the auto-return calculation logic to use the system date as the allocation date instead of the original allocation date.

Decline All:

When clicked, all the allocations that are not yet requested will be declined and returned to State's pool for re-allocation.

Warning: If the allocations are declined by the provider, all the prebookings for the same vaccine (NDC) are also returned to State for re-allocation.

Cancel:

When clicked, no changes are made to the prebook requests and the user is redirected to Prebook Request Status screen.

After the vaccines are requested, the vaccine orders follow the same flow of a normal order fulfilment process.

Auto-Return of Prebooking Allocations

Allocations that are not requested on time are auto-returned to the State for reallocation. Both NDCs and Prebook events can be set up with number of days to auto-return. When an allocation is not requested within the number of days from the allocation date (or from the date they were held), they are returned to State.

The prebookings that are auto-returned will be highlighted in red with a message (Prebookings listed in red indicate doses were allocated to you that were not requested in time, so they have been returned to the state for re-allocation) at the top of the page.

Note: Doses auto-returned are shown under the 'Declined and Returned to Pool' column in Prebook Status screen as a hyperlink and when clicked will show the reason as 'Provider did not request vaccine in time and the allocation returned to State Pool'.

Warning: If the allocations are auto-returned, all the prebookings for the same vaccine (NDC) are also returned to State for re-allocation.

Inventory Not Deducted

The Inventory Not Deducted option is used to view a listing of immunizations added to IRIS through the Data Exchange Process where the immunizations did not deduct from your inventory. This option allows you to deduct the immunization from your inventory by assigning a trade name and vaccine lot to the listed immunizations. You also have an option to remove the immunization from the list if you are not able to match it to any of your inventory lots and plan to leave it as a non-deducted immunization.

To use this option:

1. Click on **Inventory Not Deducted** under the Inventory section of the menu panel.

2. The Inventory Not Deducted screen displays listing immunizations added to IRIS from Data Exchange jobs.

3. Use the 'Select Transaction Date Range' options to view immunizations added to IRIS within your selected range. You can select from the dropdown options: Today, Past 7 days, Past 15 days, Past 30 days, Past 90 days, or enter your own date range using the From and To fields.

Note: The selected date range can only span a maximum of 90 days. If the to date is more than 90 days after the from date, you will receive a validation message. The Inventory Not Deducted function does not display immunization entered into IRIS before 01/01/2015.

4. The 'Age as on Vaccination' radio button can be used to further restrict the immunization results. If '>=19Y' option is selected, only the COVID-19 vaccines that were given at the age of >=19Y will be displayed.
5. After selecting your date range, press Refresh List to show the non-deducted immunizations added to IRIS within the selected date range.

   Only immunizations that meet the following conditions will display in the list:

   - Entered into IRIS from the Data Exchange process during the time the decrement from inventory setting was enabled for your organization
   - Entered into IRIS on or after 01/01/2015
   - Entered as administered
   - Patient is <19Y old on date of vaccination
   - Did not deduct during data exchange process
   - Have not been flagged from removal from the Inventory Not Deducted option
   - Only immunizations entered via data exchange

The following information is displayed for each immunization:

Field Name	Description
Transaction Date:	Displays the date the immunization was added to IRIS via data exchange.
Vaccination Date:	Displays the vaccination date of the immunization.
Job Id:	Displays the Job Id of the Data Exchange job that added the immunization into IRIS.
Lot/Vaccine Name:	Displays the lot number and vaccine name specified on the immunization.
Eligibility:	Displays the VFC eligibility specified on the immunization.
Patient Name:	Displays the patient's first and last name.
DOB:	Displays the patient's date of birth.
Trade Name:	Displays a listing of trade names found in your inventory for the vaccine specified on the immunization. If you do not have any vaccine lots in your inventory for the specified vaccine, the trade name list will be empty.
Inventory Lot:	Displays a listing of vaccine lots in your inventory for the selected trade name that have available quantity, and that were not expired prior to the vaccination date. The lot number and funding are displayed. PVF indicates private funding, PBF indicates public funding. If there are no inventory lots with quantity on hand, you will see 'Insufficient/No inventory' displayed here.
Update Checkbox	Used to select the immunization for update. This checkbox will not be selectable until both the trade name and lot number are selected.
Remove Checkbox	Idaho Vaccine Program (State) users can remove items from the list, if needed. Used to flag the immunization for removal. Once saved, this immunization will no longer display in the Inventory Not Deducted screen or report. This check box will not be selectable if the update check box is selected. If the 'Insufficient/No inventory' is displayed, the 'Remove' check box will be disabled preventing it from being removed.

6. To update the immunization and inventory, do the following steps for each

immunization you want to deduct:

- Select the trade name
- Select the lot number
- Check the update box
  When you check the update box a validation is done against the eligibility on the immunization compared to the funding on the selected lot number.

  If a dose from a PVF ‘Private’ funded lot vaccine is selected to a patient that has VFC status eligible V02, V03, V04 or V05), the following warning will display:

    - Warning – Dose was administered to a patient less than 19 years old that was not from a public funded lot. Is this being correct click Ok. If this is not correct, then click Cancel

Note: The VFC eligibility cannot be edited using the Inventory Not Deducted screen. You’ll need to update the immunization directly using the edit immunization screen. You’ll then see the updated VFC value when you return to this screen after changing the immunization.

7. To remove the immunization from the listing without updating the inventory, do the following steps

   • Check the remove box

8. Once you are done selecting your immunizations on the current page for update and remove, select the save button to commit the changes. This updates the immunization and removes it from the Inventory Not Deducted list. For those you selected for update, it deducts from your inventory and generates an inventory transaction dated with the current date. All immunizations updated or removed through this process when viewed in the edit immunization screen display a ‘Edited through IND screen: Y’ notice.

Note: If one or more immunizations were selected as Remove, you will see a confirmation message stating: Transactions marked as Remove will not deduct from inventory. Are you sure you want to remove the transaction(s)?

9. Use the page options at the bottom right of the screen if your immunization listing spans multiple pages. If you've entered information on the screen and press select to move to a new page, you will receive a notice letting you know you need to press save or you'll lose your changes. You'll also receive this notice if you press refresh or cancel.

Managing Patients

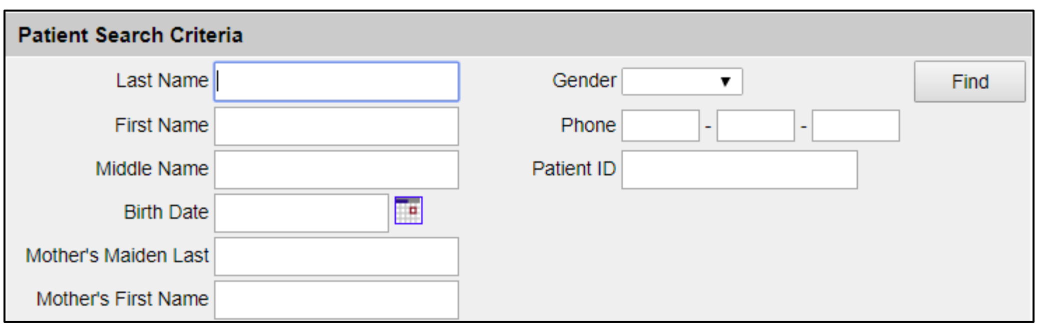
In this chapter:

IRIS receives immunization information from multiple sources, including provider electronic health records (EHRs), local health departments, pharmacies and vital birth records. You should always attempt to find a patient in IRIS using the manage patient or manage immunization search screens before attempting to entering a new patient. Prior to creating a new patient record on Enter New Patient screen, IRIS will also search for a matching patient (duplicate patients).

Finding Patients

As mentioned above, it is extremely important that you always search for a patient in IRIS before entering them as new. This will prevent duplicate patient records from being entered into the system. There are many different combinations of search criteria that can be used to locate patients in IRIS. Remember, when searching for patients in IRIS, you are searching on a statewide level and not just within your organization. With this in mind, when searching for an existing patient in IRIS, more information is not always better. By entering too much information about a patient (mother's maiden name, phone number, birth date, etc.) you will increase your data entry time and decrease the odds of finding the patient due to typing and interpretation errors. To review recommended search criteria examples, please review the section "Examples of IRIS Search Criteria" later in this chapter.

1. Click on **Manage Patient** under the Patients menu group on the menu panel.



2. In the Patient Search Criteria box, you have several options for finding your patient.

Last Name: Entering the first three letters of the patient's last name, along with the first two letters of the first name, will initiate a search of all patients matching those letters. Entering fewer than three letters in the last name field will result in an exact name search; for example, entering the letters "Li" will produce only last names of "Li." If the patient's name is common, typing in the full name will narrow the search.

First Name: Entering the first two letters of the patient's first name, along with the first three letters of the last name, will initiate a search of all patients matching those letters. If the patient's name is common, typing in the full name will narrow the search.

Note:
On all first and last names entered into IRIS for patient searches, IRIS disregards spaces, apostrophes, and hyphens entered.

Middle Name: Entering the first two letters of the patient's first name, along with the first three letters of the last name, and the patient's Middle Name will initiate a search of all patients matching those letters. If the patient's name is common, typing in the middle name will narrow the search.

Mother's Maiden Last Name: Entering the mother's maiden last name in combination with the data entered in the Last Name and First Name fields, will narrow a search for a patient with a common name. Alternately, you may find all patients associated with a mother by entering only the mother's first name and maiden last name.

Mother's First Name: Entering the mother's first name, in combination with the data entered in the above Last Name and First Name fields will narrow a search for a patient with a common last name. Alternately, you may find all patients associated with a mother by entering only the mother's maiden last and first names.

Birth Date: Entering the patient's birth date in conjunction with his or her first and last name will narrow a search for a common name.

Gender: Indicating the gender of the patient will narrow a search for a common name, especially if the first name is androgynous.

Phone: Entering the patient's phone number only will identify patients with the exact phone number in IRIS. However, this method is not recommended, as a phone number may not be entered for a patient and phone numbers may change over time.

Patient ID: Entering the Patient Identifier only will produce a single name match, if the patient ID is unique to the organization. To find a patient using this method, your organization's Patient ID must have been entered previously in the patient record.

3. Press Find button.
4. If only one patient matches your search, IRIS will bring you directly to that patient's demographic screen in IRIS.

5. If multiple records are found matching the criteria you entered, a table listing up to 75 matches with detailed information on each patient will be shown below the Find Patient Information box. To choose a patient from this list, click on the patient's last name, underlined in blue

Possible Matches: 9

Last Name	First Name	Middle Name	Birth Date	Patient ID	Mother's Maiden First	Mother's Maiden Last	Gender	Status
TEST	TORI		12/13/2009				F	A
TEST	TOM		01/18/1953				M	I
TEST	TOBY		09/03/1997	CH123456	KAREN	TEST	M	M
TEST	TOBY		12/05/2003				M	I
TEST	TOM		10/31/2011		JENNIFER	IRIS	M	I
TEST	TOMMY		10/31/2011		IRIS	IRIS	M	I
TEST	TONY		01/01/1981				M	I
TEST	TONY		01/22/2006		PAMELA	TEST	M	I
TESTER	TOTEST		09/01/2010		FIRSTLY	LASTLY	F	I

6. If no patients match your search, review the search criteria information you entered for accuracy. If you suspect the patient has not been entered into IRIS, proceed to **Enter New Patient** from the Patients section of the menu panel.

7. A maximum of 75 records matching the criteria you entered may be listed. If there are over 75 matches, IRIS will indicate that there are too many patients matching your search criteria and instruct you to refine your search criteria.

Manage Patient vs. Manage Immunizations

Manage Patient and Manage Immunizations are the same query; in other words, they both utilize the patient search function. The difference is that the Manage Patient query will display the Patient Demographic screen, while the Manage Immunizations query will display the patient's Immunization History screen.

Examples of IRIS Search Criteria

It is recommended that users utilize the "3-2" search when attempting to find patients in IRIS. The 3-2 search includes the first three letters of the patient's last name, followed by the first two letters of the patient's first name. However, the following alternative search options can help refine or narrow search results:

Patient Last Name and Date of Birth (DOB)
Patient DOB and Gender
Patient ID
Patient DOB

It is recommended that additional criteria be used when searching for patients with common names. This will help narrow the list of possible matches in IRIS.

Use of Drop Down Lists in IRIS

When entering information on new patients or editing patient information, you will use drop down lists for many fields. IRIS uses drop down lists — fields that contain a list of options from which you may choose — rather than free text fields for certain input data. The advantages of drop down lists over free text fields include:

- Ease of use. Drop down lists allow users to quickly fill in a data field without typing in the information.
- Health Level 7 (HL7) compliance. HL7 is a method of categorizing data so that it is uniform across all health reporting systems. This standardization allows providers using different systems to transfer data easily. With predefined drop down lists IRIS stays in HL7 compliance.
- Uniformity of entered data. By choosing information from a drop down list, users do not risk entering conflicting information that could decrease the accuracy of IRIS reports. For example, one user using a free text field might enter a county name using an abbreviation, while another user might spell out the entire name.
- Confidentiality. By using standard drop down lists, IRIS avoids confidentiality issues associated with the typing of free text that could be construed as medical record information.

Editing/Entering Patient Information

The demographic screen allows you to update or change specific, non-immunization information relating to any patient in IRIS. The Enter New Patient screen, accessed by clicking **Enter New Patient** within the Patients section of the menu panel, allows you to input information for a new patient into IRIS. The demographic and Enter New Patient screens are divided into the following sections:

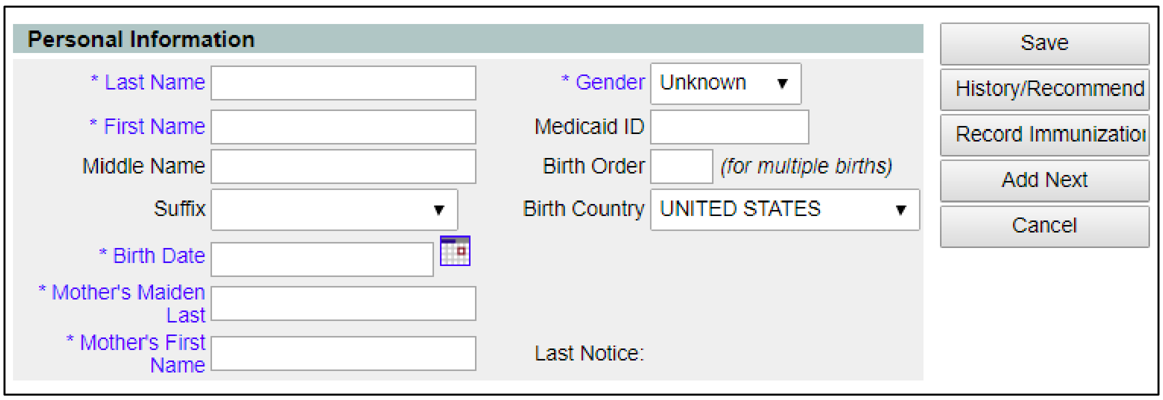
- Personal Information
- Patient Information
- Address Information
- Responsible Persons
- Patient Comments
- Patient Notes
- CRA Event

Note: Organizations participating in a pandemic exercise or event will utilize the CRA Event Information section located directly beneath the Patient Information section of the demographic screen. The CRA Event Information is hidden unless an event is in progress.

Personal Information Section

The Personal Information Section at the top of the Demographic/Enter New Patient screens contains patient-specific information used primarily to identify patients when conducting patient searches. All fields shown in blue font are required. Refer to Appendix 2 of this manual for information on allowable entry characters and names for these fields.

1. Enter the following field information:



Last Name: Patient's last name is a required field. If patient has two last names, enter the names with a space as in 'Smith Jones.'

First Name: Patient's first name is a required field. Please enter the patient's name, not a nickname or alias.

Middle Name: Patient's middle name is optional.

Suffix: Patient's last name suffix is optional. Please enter the suffix to distinguish the patient from a parent with the same name.

Birth Date: Patient's birth date is a required field. Fill in the field using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. Then choose a month and year from the drop down lists at the top and choose a day by clicking on the appropriate calendar day. Press OK.

Children entered through information provided by the Idaho Bureau of Vital Records will not have editable birth dates. The parent/guardian must contact the Idaho Bureau of Vital Records and/or the IRIS Help Desk (208) 334-5995 in the event a birth date is in dispute.

Mother's Maiden Last Name: Patient's mother's maiden last name is a required field. IRIS will allow you to save the record without this field completed; however, it will request you gather this information for future deduplication of patients.

Mother's First Name: Patient's mother's first name is a required field. IRIS will allow you to save the record without this field completed; however, it will request you gather this information for future deduplication of patients.

Note: It is critical that the information in the Mother's Maiden Name fields is accurate. If you do not have the correct information, leave these fields blank. Please do NOT use a fake name, foster mother or type "unknown" in the fields.

Gender: Patient's gender is a required field. This field defaults to "Unknown." Select the appropriate option from the drop down list to choose male or female.

Medicaid ID: Patient's Medicaid ID is optional.

Birth Order: Patient's birth order is optional. This field that identifies the birth order of the patient in a birth event. This field should only be used for multiple births (e.g. twins, triplets).

Birth Country: Patient's birth country is required. This field defaults to "United States." Use the drop down list to select a different country of birth, if applicable.

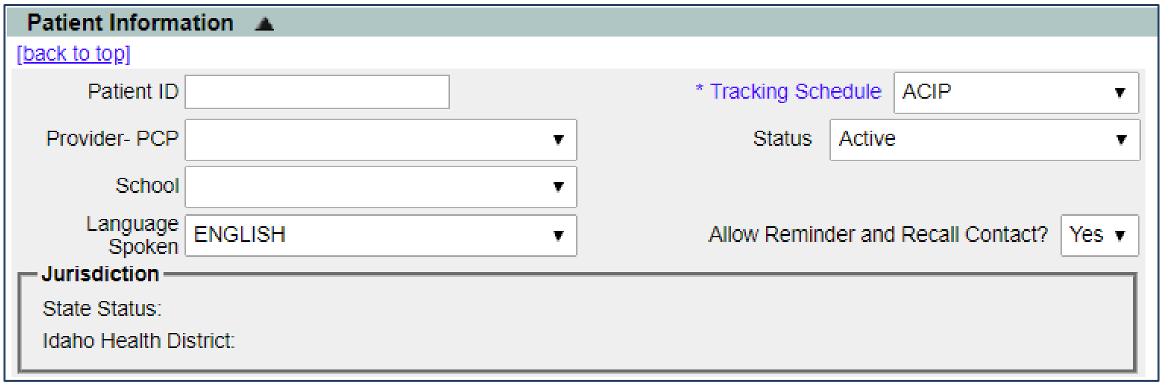
Last Notice: This field shows the last date that a reminder/recall notice was created for the patient.

2. Press **Save** button (Top of Screen) when complete to save changes.

Patient Information Section

The Patient Information Section gives additional information about the patient.

1. Click on the Patient Information Section. Enter the following field information:



Patient ID: Type in your organization's patient Identifier for the patient. Patient ID's are specific to each provider organization. A patient may have separate patient IDs for separate provider organizations.

Provider-(PCP): Fill in the patient's primary care physician (PCP) or health care organization from the drop down list, if provided. This information is used only for reporting and must be set up by the organization's administrative user. For instructions on how to set up the Provider (PCP) field, refer to "Managing Physicians" in Chapter 8.

School: Fill in the patient's school from the drop down list, if provided. This information is used only for reporting and must be set up by the organization's administrative user. For instructions on how to set up the School field, refer to "Managing Schools" in Chapter 8.

Language Spoken: Choose the primary language spoken by the Patient.

Jurisdiction: Jurisdiction contains two fields that are auto-populated by IRIS when the patient is saved and are read only.

- **State Status** is the status of the patient within the jurisdiction of the Idaho Immunization Program IRIS application.
- **Idaho Health District** is the district the patient resides in. It is determined by the patient's address.

Tracking Schedule: This required field defaults to the Advisory Committee on Immunization Practices (ACIP) schedule. The appropriate tracking schedule will be determined by IRIS for school and childcare organizations.

Status: Choose Active from the drop down list if you want this patient to be associated with your organization, meaning he or she is receiving services from you. Status information affects reminder/recall notices and AFIX and other reports. Refer to the Manage Patient Status section of this chapter for information on how to review and update the status for an entire patient cohort.

The Status of a patient is specific to your organization with one exception, setting a patient's status as deceased will inactivate that patient for every organization and render their status field read only. To change a patient's status, who is listed as *deceased*, contact the IRIS Help Desk (208)334-5995.

Note: Status will be set to 'Active' if you enter immunizations for a patient on the Record Immunization screen OR through data exchange if your EHR/vendor does not specify a different status in the incoming status field.

Date of Death: Date of Death field will only display if the selected Status is Deceased. Once Date of Death has been entered, the field is read only. To change the Date of Death, contact the IRIS Help Desk (208)334-5995.

Allow Reminder and Recall Contact?: Choosing Yes from the drop down list, you are allowing reminder/recall notices to be sent to this patient when you run the reminder/recall report. If the patient's parent chooses not to have reminder/recall notices sent, choose No from the drop down list to exclude the patient from the report.

2. Press **Save** button (Top of Screen) when complete to save changes.

Generation of reminder and recall notices

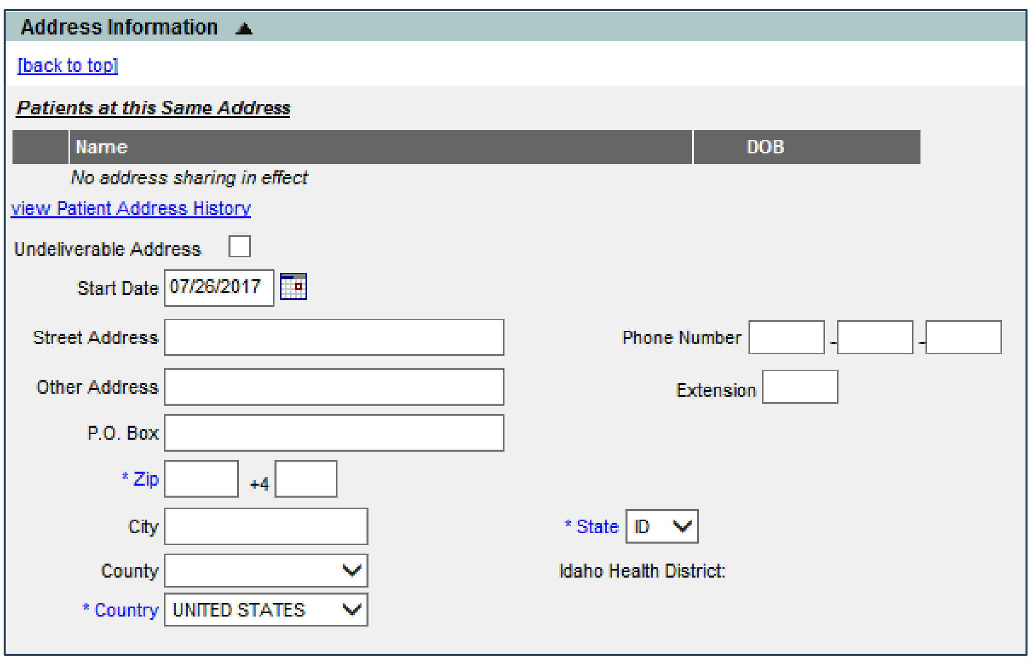
When running the reminder/recall report, letters are generated for every patient, given that the following conditions are met:

- The patient's status is set to "Active" on the Patient Information tab.
- The "Allow Reminder and Recall Contact?" indicator, is set to "Yes," on the Patient Information tab.
- The patient's address must be a full mailing address to be included in letters and labels. The Reminder Output **Patient Query Listing** Report will include all patients meeting the reminder request criteria. The listing will display the address as 'Valid' if the mailing address is complete or 'Invalid' for patients' missing address information.

Address Information Section

The Address Information Section allows you to identify the current address of the patient. In the future, it will also allow you to identify other siblings in the same household.

1. Click on the **Address Information** Section. Enter the following information:



Undeliverable Address: Mark this checkbox if information was sent to the patient and the information was returned as not deliverable.

Start Date:	Fill in the start date of the address using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. Then choose a month and year from the drop down lists at the top and choose a day by clicking on the appropriate calendar day. Press OK to enter the Start Date. This is the Start Date of the Patient's New Address.
Street Address:	Street Address of the patient.
Other Address:	Additional address information, if any, for example, a suite number or apartment number could be entered here.
P.O. Box:	Post-Office Box, if applicable, for the patient.
Zip:	Zip code of the patient. Zip code is required if Country is United States or a US Territory.
+4:	Extended Zip code numbers of the Patient, if available.

Tip: If you enter an Idaho zip code, IRIS will populate the city, state and county for you when the patient is saved.

City:	City (or town) of the patients address.
State:	State of the patient's address. State is required if Country is United States or a US Territory.
County:	County where the patient resides. This list only includes Idaho counties.
Idaho Heath District:	IRIS will populate the Health District if the patient resides in Idaho. This field is read only.
Country:	The Country where the patient resides. The Country is a required field.
Phone Number:	Phone Number of the Patient.

Extension: Phone extension if applicable.

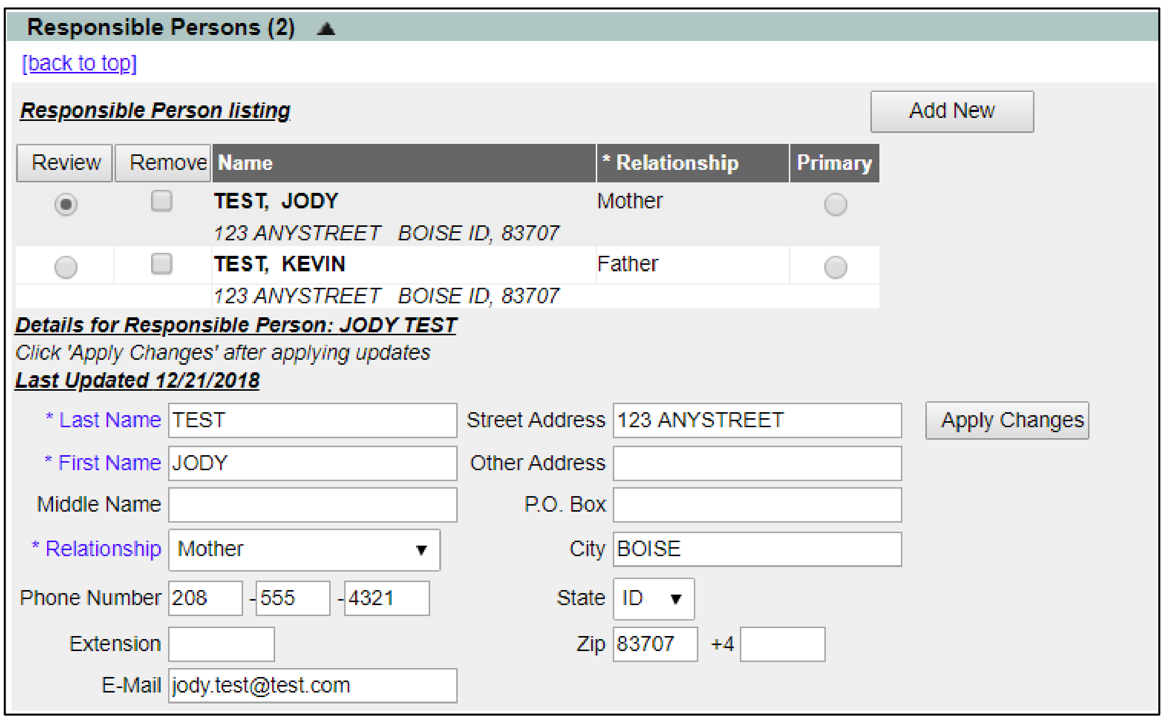
2. Press **Save** button (Top of Screen) when complete to save changes.

Note: Clicking the view Patient Address History link will present a window with the patient's address History.

Responsible Persons Section

The Responsible Persons Section allows you to identify patient emergency contact information. The only required fields under this section are the Last Name, First Name and Relationship fields.

1. Click on the **Responsible Persons** Section. Enter the following information:



To edit an existing responsible person, do the following:

1. Click on the Review radio button next to the name of the person you wish to edit.
2. Click **Review** button.
3. Change or add information for the fields listed.
4. Press **Apply Changes**.
5. Press **Save** button (Top of Screen).

To enter a new responsible person, do the following:

1. Click the **Add New** command button. Enter Information into the following fields:

Last Name:	Enter the last name of the responsible person into this field. This is a required field.
First Name:	Enter the first name of the responsible person into this field. This is a required field.
Middle Name:	Enter the responsible person's middle name in this field.
Relationship:	Choose the relationship of the responsible person to the patient from the drop down list provided. This is a required field.
Phone Number:	Enter the responsible person's telephone number, including the area code, in this field.
Extension:	Enter the responsible person's extension to the above telephone number, if any, into this field.
Email:	Enter the responsible person's email address into this field.
Street Address:	Enter the responsible person's street address into this field.
Other Address:	Enter the responsible person's additional address information, if any, into this field. For example, a suite number or apartment number could be entered here.
P.O. Box:	Enter the responsible person's post-office box, or mailing address if different than the street address, into this field
City:	Enter the responsible person's city (or town) into this field.
State:	Choose the responsible person's state from the drop down list provided.
ZIP:	Enter the responsible person's zip code in this field.
+4:	Enter the responsible person's +4 zip code in this field.

2. To save the information you entered or edited press **Apply Changes,** and then press **Save** (top of screen).

3. To clear existing information and enter another new responsible person, press **Add New** and follow steps above to enter new patient. Repeat steps 1-2 as needed to add multiple responsible persons.

Deleting an existing responsible person record

1. Select the Remove check box next to the record you wish to delete on the Responsible Person Listing table.
2. Press **Remove button**.
3. Press **Save** button (top of screen).

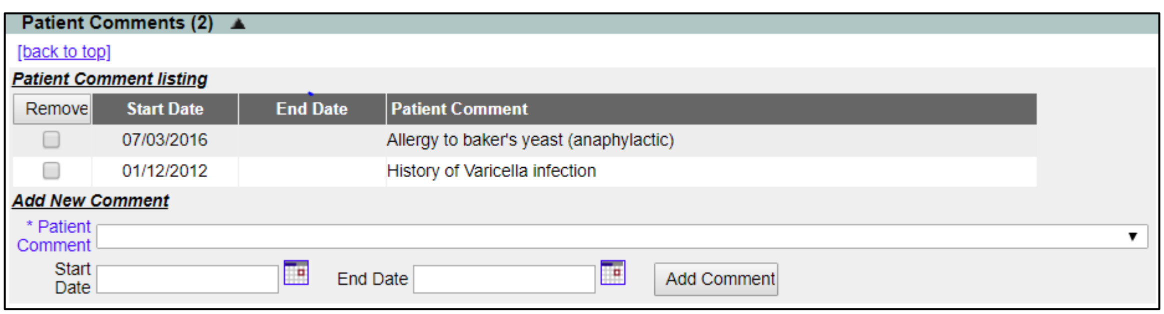
Patient Comments Section

The Patient Comments Section allows you to enter immunization-related comments, such as contraindications, precautions, history of disease, serologic confirmed immunity, refusals and even special indications to immunize (for example, patient exposure to the rabies virus). The patient comments list is derived from a pre-selected CDC-standardized list and is displayed in drop down list form.

Although the "**Start Date**" is not a required field, a start date must be entered in order to properly interact with the immunization schedule for the specified vaccine group and reflect on AFIX reports. If a start date is not entered the vaccine group that is contraindicated, for example, will still be recommended. Note that not all comments will affect the schedule, even if a Start Date is entered. The "**End Date"** can be entered if a condition is temporary.

The patient comments are visible at the top of the Immunization History, Edit Immunization, Pre-Select Immunization, and Record Immunization screens. Also, when using the button on the immunization history page, the comments are displayed on separate lines in the Comments box.

1. Click on the **Patient Comments** Section. Enter the following information:


Patient Comments (2)

[back to top]

Patient Comment listing

Remove	Start Date	End Date	Patient Comment
☐	07/03/2016		Allergy to baker's yeast (anaphylactic)
☐	01/12/2012		History of Varicella infection

Add New Comment

* Patient Comment

Start Date | End Date | Add Comment

2. Choose the appropriate comment from the Patient Comment drop down list.
3. Enter the date to which the comment refers in the Start Date field. Fill in the field using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar

icon to the right of the field. Then choose a month and year from the drop down lists at the top and choose a day by clicking on the appropriate calendar day. Press OK.

4. Enter the date to which the comment Ends in the End Date field. Fill in the field using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. Then choose a month and year from the drop down lists at the top and choose a day by clicking on the appropriate calendar day. Press OK.
5. To enter the comment into the Patient Comments Listing, press the **Add Comment** button. Repeat steps 2-4 as needed to enter multiple comments.
6. Press the **Save** button (top of screen).

Patient Refusal of Vaccine Comments or School/Childcare Waivers

IRIS users should enter refusal comments with appropriate start dates to document vaccine refusal. This information will help other providers understand why a vaccine group might be overdue for a particular patient in IRIS.

School and Childcare organizations will have waiver comments for school/childcare admission or attendance. Each organization must enter their own waiver comment into IRIS to exempt child from vaccine eligibility requirements.

Restart Comments

If a physician decides to repeat a vaccine series and the appropriate comment and Start Date are entered in IRIS, then all vaccinations prior to that date are not evaluated as part of the series. Any doses recorded on or after the Start Date will be evaluated as if they were the first doses received for that vaccine group.

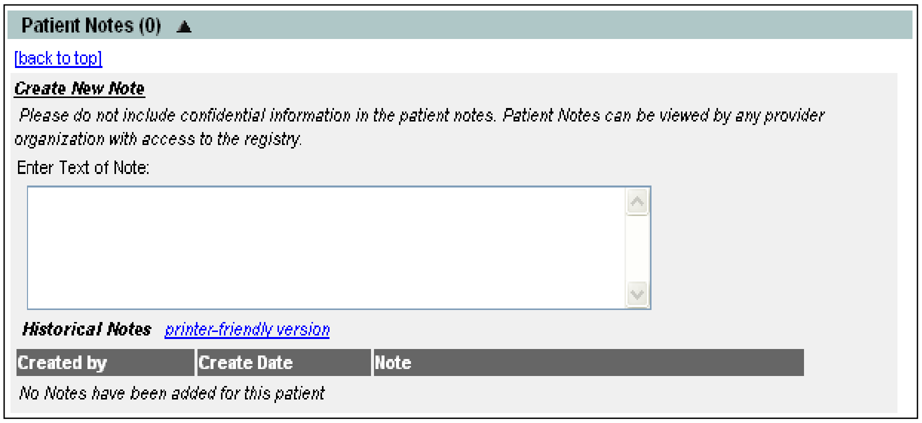
Deleting an existing comment

1. Select the Remove check box next to the comment you wish to delete on the Patient Comment Listing table.
2. Press **Remove** button.
3. Press the **Save** button (top of screen).

Patient Notes Section

The Patient Notes Section allows you to enter notes for a patient.

1. Click on the **Patient Notes** Section.



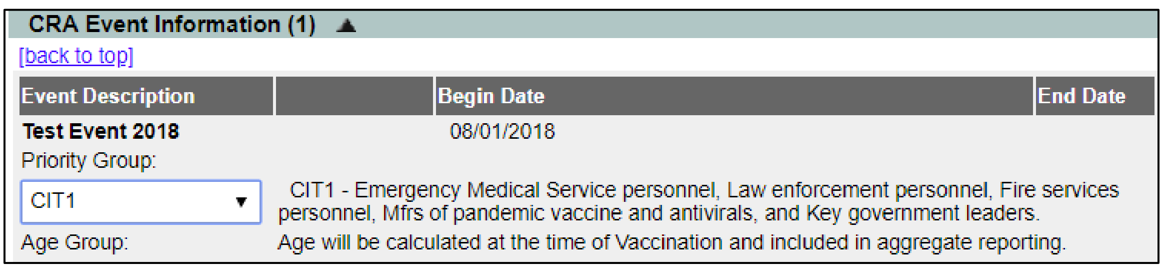
2. Enter Text of Note: Enter text up to 4,000 characters in the text box.
3. Press the **Save** button.

Countermeasure and Response Administration (CRA)

CRA Event Information Section

If your organization is selected for an event, the Countermeasure Response Administration (CRA) Event Information section will be displayed below the Patient Information section of the Demographic screen. The CRA Event Information section is used to collect Public Health data during a pandemic response event or preparedness exercise (such as the response event to a Pandemic Influenza outbreak.) During an ongoing event the CRA Event Information section will be displayed on the Edit/Enter New Client screen. Based on candidate screening, select the appropriate priority group category for each patient. You may also enter the patient's CRA group

Note: In the event of a public health emergency, IRIS may be used to track the administration of vaccine. In some instances specific groups may be identified as being at higher risk than the general population and targeted as priority groups to receive the vaccination first. The CRA Event Information is hidden unless an event is in progress.



4. Event Information is displayed on the Enter New/Edit Patient screen if your organization is included in an Event. At least one of the reporting options will display for the Event. You may also enter the information on the Immunization Detail Entry screen if a vaccine included in the event is selected to be entered.

Priority Group: Priority Group: is displayed in the drop down list. When selected, a full description of the selected priority group will be listed to the right of the priority group drop down list

Age Group: Age Group is not required and will be calculated at the time of vaccination.

Saving Patient Information

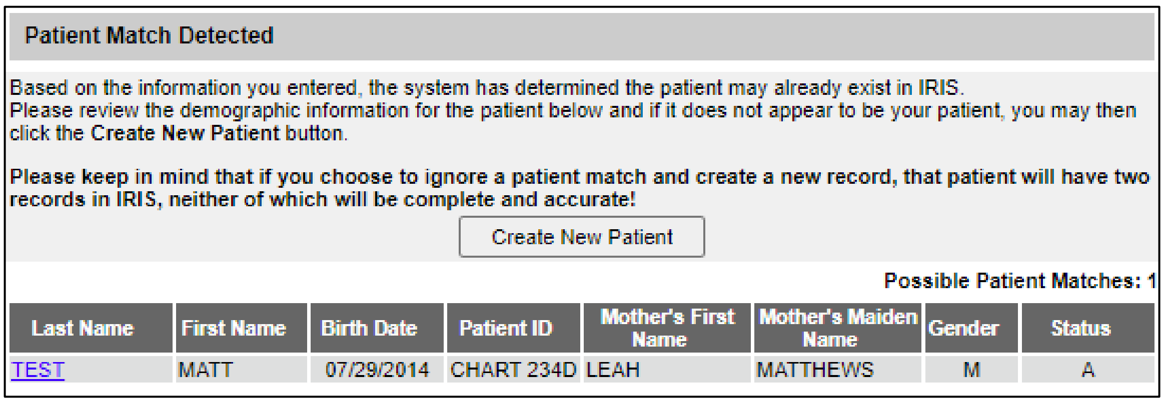
There are several ways to save information on the Demographic/Enter New Patient screens:

Save:	When pressed, the **Save** command button at the top of the screen will save all information fields within the Personal Information Section, Patient Information Section, Address Information Section, Responsible Persons Section, Patient Comments Section and the Patients Notes Section to the IRIS database. Once the patient data is saved, the message “Patient record successfully saved” will appear at the top of the Personal Information Header.
History/Recommend:	As with the Save command button, the **History/Recommend** command button will save all information fields. Once the information is saved, the patient’s Immunization History screen will display.
Record Immunization:	When the **Record Immunization** command button is pressed, all information fields will be saved and the Pre-Select immunization screen will display. This button allows you to bypass the history screen for a patient and go directly to adding immunizations.
Reports:	As with the Save command button, the **Reports** command button will save all information fields. Once the information is saved, the Reports Available for Patient screen will display, so that a report may be generated for the patient. Refer to the Reports and Forms chapter of this manual for more information on reports.
Cancel:	When pressed, the **Cancel** command button clears all entered information and <u>**does not save it to IRIS**</u>. The Find Patient or Enter New Patient screen is displayed.

Deduplication of Patient Records

After you enter a new patient and press one of the command buttons that will save the data, IRIS initiates a process that ensures that the patient information you entered does not duplicate a patient that already exists in IRIS.

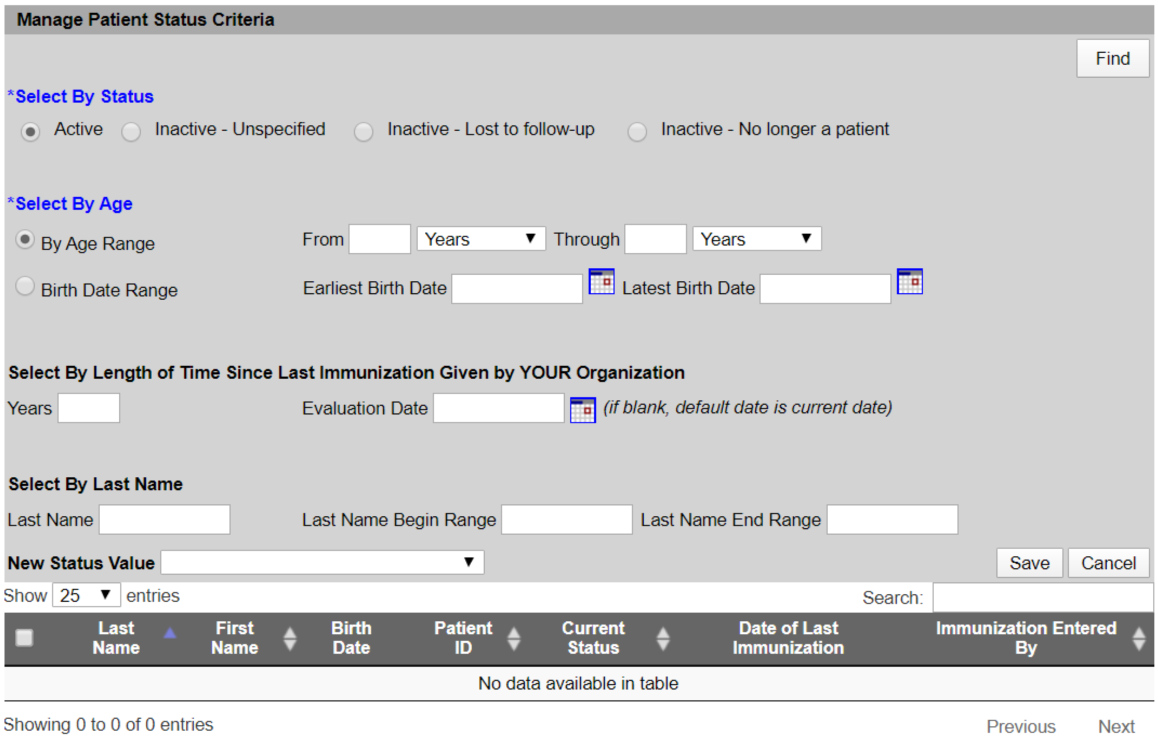
If, after attempting to save a new patient, you receive a message box titled "Patient Match Detected," IRIS has determined that the patient you are attempting to save already exists in the database. A table below the message box will contain one or more names of potential matches within IRIS. Click on each last name to display his or her information. IRIS will identify matching patients even if the patient has had a name change; therefore, if you do receive a list of potential matches, click on the link(s) to determine whether one of the links matches your patient's record.



If after reviewing all the names given in the table you do not find a match for your patient, press the Create New Patient button. A confirmation box will appear; press OK. Be aware that if you do override the listed matches and end up creating a duplicate record for a patient, it will be difficult to manage the patient's immunization and personal information and the registry will lose its accuracy and efficiency. If you identify possible duplicate patient records, you should call the IRIS Help Desk immediately, (208) 334-5995.

Managing Patient Status

From the Patients menu option, applicable user roles within provider organizations can retrieve a group of patients and perform bulk changes to the patient status using the manage patient status hyperlink.



Manage Patient Status Criteria

To retrieve Patient Status results, fill in the criteria on the Manage Patient Status Criteria screen:

Note:

A maximum of 1,000 patient records may be returned. If you search results in more than 1,000 patient matches, you will be asked to narrow your search criteria.

1. Click *manage patient status* hyperlink under Patients on the menu panel.
2. Once directed to the Manage Patient Status Criteria screen, the provider will have the ability to search for a group of patients using the following search criteria:

3. ***Select by Status** (Required)

    - Active *(default option)*
    - Inactive – Unspecified
    - Inactive – Lost to Follow-up
    - Inactive - No longer a patient

4. ***Select by Age** (Required)

    - *Select by Patient Age Range*:   Enter the From and Through Ages in months or years.   The ‘Through’ Age is inclusive (i.e. age 12 years through 13 years will include patients up to 14th birthday).
    - *Birth Date Range*: Enter the From and To Birth Date in MM/D/YYYY format.

5. **Length of Time Since Last Immunization Given by YOUR Organization**

    - *Years* (since last immunization): The number of years from the Evaluation Date that need to have passed since the patients last vaccination date. This would only review immunizations entered into IRIS by your organization.
    - *Evaluation Date* (blank defaults to current date)

6. **Patient Last Name**

    - *Last Name search* (minimum of first two characters)

      OR

    - *Last Name Begin Range* (minimum of first two characters)
    - *Last Name End Range* (minimum of first two characters)

7. Run Search Query by selecting the **Find** button**.** The screen will display ‘Processing’ while the search query is running.   Do not leave the page while the query is running.

Patient Status Results

When the query is complete, the table will be populated with the patient records meeting the search criteria.

1. **New Status Value** field drop-down will populate with the patients status options. Select the status you wish to save on selected patients.
2. **Show ___ entries** allows user to control the number of patient records displayed on each page.
3. **Search** allows the user to future refine the search. Note that the search is preformed against the next of all result fields. You could find matching records in name and Immunization Entered By field for example. This field can by useful if you know the specific first or last name of someone you trying to find

New Status Value [▾] Save Cancel

Show 10 ▾ entries Search:

	Last Name	First Name	Birth Date	Patient ID	Current Status	Date of Last Immunization	Immunization Entered By
☐	BALLY	MASON	06/14/2013	LATEST 1	Active	02/01/2016	Mari's VFC Provider Spirit Lake - Twin Lake
☐	BANNER	ANDREW	01/03/2008	08036_8L1	Active	08/01/2010	Mari's VFC Provider Spirit Lake - Twin Lake
☐	BETTS	SUZANNE	01/09/2012	LATEST 1	Active	02/01/2016	Mari's VFC Provider Spirit Lake - Twin Lake
☐	CHAPMAN	MICHELLE	03/14/2007	08036_8F	Active	08/01/2010	Mari's VFC Provider Spirit Lake - Twin Lake
☐	COOPER	AARON	12/05/2013	DX AUDIT	Active	12/31/2017	Mari's VFC Provider Spirit Lake
☐	DAMIAN	GINO	09/05/2017	ENROLL UNDER 1	Active	12/31/2017	Mari's VFC Provider Spirit Lake - Twin Lake
☐	ERIKSEN	CONNER	10/03/2013	VACCINEGROUP2	Active	08/01/2017	Mari's VFC Provider Spirit Lake - Child Granite 123
☐	EVANS	GAVIN	08/12/2013	LATEST 1	Active	02/01/2016	Mari's VFC Provider Spirit Lake - Twin Lake
☐	FALLON	HANNAH	12/12/2015	LATEST 1	Active	02/01/2016	Mari's VFC Provider Spirit Lake - Twin Lake
☐	GONZALES	JUAN	07/05/2017	ENROLL UNDER 1	Active	12/22/2017	Mari's VFC Provider Spirit Lake - Twin Lake

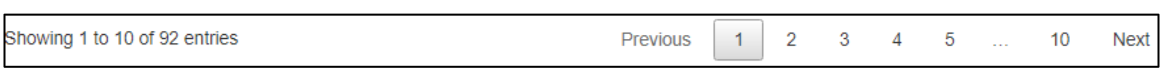
Showing 1 to 10 of 92 entries Previous 1 2 3 4 5 … 10 Next

Search Result Table

You can sort the results on any field that displays the downward and upward triangles

- **Select All/Deselect All Checkbox**:
    - Unchecked by default
    - Selecting header box will check/uncheck all applicable records on **ALL PAGES**. ***Use the select all with caution as you can update 1,000 records at once!***
    - Selecting individual rows will check/uncheck individual record
- **Last Name:**
    - Displays patient’s last name
- **First Name:**
    - Displays patient’s first name
- **Birth Date:**
    - Displays patient’s birth date
- **Patient ID:**
    - Displays patient’s identifier for your organization if entered in IRIS.
- **Current Status:**
    - Displays patient’s current status
- **Date of Last Immunization:**
    - Displays the most recent vaccination date in IRIS for immunization entered by ANY organization.
- **Immunization Entered By:**
    - Displays the name of the organization that entered the last immunization

4. Depending upon the number of patients matching your search criteria, the system may return one or more pages of results. The bottom of the search result list will show how many patients were returned and which page you are currently viewing.



New Status Value for Patient Status Result Set

To change a patient status for one or more patients, you will:

1. Select Patient(s) checkbox
    - To select/deselect all patients on **ALL PAGES**, put a checkmark in the Select All/Deselect All box in the header. ***Use the select all with caution as you can update 1,000 records at once!***
    - To select/deselect individual patients on the screen, put a checkmark in the checkbox next to each patient. You can select individual pages from different pages to update.
    - Selected patients will be highlighted in blue. You can click on the Next and Previous links at the bottom of the results table to navigate to the Next screen or select a specific page number to jump to that page. The count of the selected row is displayed at the bottom of the screen.

☑	JACKSON	INA	05/01/2009	Active	04/30/2010	Mari's VFC Provider Spirit Lake - Twin Lake
☐	JACKSON	JULIA	05/01/2009	Active	06/30/2010	Mari's VFC Provider Spirit Lake - Twin Lake

Showing 11 to 20 of 92 entries 3 rows selected Previous 1 2 3 4 5 … 10 Next

2. Select a **New Status Value** from the drop-down list.
3. Select the **Save** button to update selected patients. A popup window with the selected status and number of selected patients will display. Verify the information is correct and click Ok to proceed with the update. Click Cancel on the popup to return to manage patient status screen results. All patients selected will now display the new patient status value set with the save.
4. Selecting **Cancel** returns provider to the blank default Manage Patient Status Criteria screen without saving. A popup window will confirm you want to Cancel without saving. Click Ok and the screen will refresh to default values. Click Cancel on the popup to return to manage patient status screen results.

Narrowing Patient Status Results Set Output Options

To narrow search results, there are three search criteria options:

1. *Select By Age using a more restrictive Age Range or Birth Date Range
2. Select 'By Length of Time Since Last Immunization Given by YOUR Organization' to find patients that have not been recently vaccinated by your organization.
3. Select By Last Name Range to limit the patients by name 'AA-LZ' to work through an age range in groups.

Managing Immunizations

In this chapter:

Viewing Patient Immunization Information
Entering Immunizations
Editing Immunizations
Countermeasure and Response Administration (CRA)

IRIS allows you to view and manage historical immunization information and add new immunizations for a patient. It also recommends immunizations based on the ACIP tracking schedule, or the tracking schedule configured for that patient.

Immunization information for a specific patient may be accessed one of two ways:

1. Choose **Manage Patient** under the Patients section of the menu panel. This will bring up the Find Patient screen. For information on finding patients, refer to Chapter 10, Managing Patients. Once a patient is retrieved, select the ***History Recommend*** button to display the patient's Immunization History screen.

OR

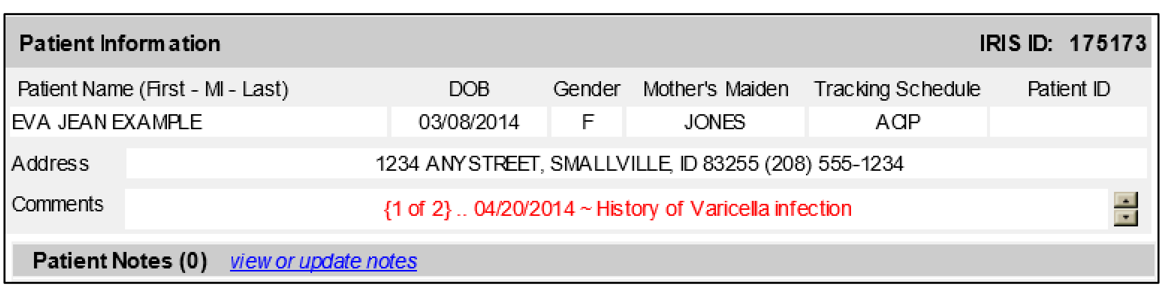
2. Choose **Manage Immunizations** under the Immunizations section of the menu panel. This will bring up the Find Patient screen. For information on finding patients, refer to Chapter 10 of this manual, Managing Patients. Once a patient is retrieved, you will be immediately brought to the patient's Immunization History screen.

Viewing Patient Immunization Information

The Immunization History screen holds a large amount of information on each patient in IRIS. The screen has three sections: Patient Information, Immunization History, and Vaccines Recommended by Selected Tracking Schedule.

Patient Information

The Patient Information section at the top of the Immunization History screen displays information on the patient, such as name, DOB, Tracking Schedule, Address, Patient ID, and a scrollable list of Comments. Use this information to verify that the patient indicated is the patient for whom you were searching. To edit this information, press Edit Patient and refer to the *Editing/Entering Patient Information* section in Chapter 10 of this manual, Managing Patients.



The validation message "This patient has missing and/or incomplete address information on file. Please update the patient address before entering immunizations." is displayed after 'Patient Notes' section when the Patient's country is United States or one of the US Territories and Patient's address does not have a Zip.

Immunization History

This table lists all the immunizations the patient has received to date that have been entered into IRIS. Immunizations are listed alphabetically by vaccine group and ordered by “Date Administered.”

History Add Immunization | Edit Patient | Reports | Print | Print Confidential

Vaccine Group	Date Administered	Series	Trade Name	Dose	Owned?	Reaction	Hist?	Edit
DTP/aP	05/08/2014	1 of 5			No		Yes	
	07/10/2014	2 of 5			No		Yes	
	08/18/2014	3 of 5	Pediarix ®	Full	No			
HepA	12/20/2014	NOT VALID	VAQTA-Peds 2 Dose ®	Full	No			
HepB	08/18/2014	1 of 3	Pediarix ®	Full	No			
	11/01/2014	2 of 3	Comvax ®				Yes	
	03/01/2015	3 of 3	Comvax ®				Yes	
Hib	11/01/2014	1 of 3	Comvax ®				Yes	
	03/01/2015	2 of 3	Comvax ®				Yes	
Influenza	11/15/2014	PARTIAL DOSE	Fluzone Quad PF Infant ®	Full				
	11/15/2014	1 of 2	Fluzone Quad PF Infant ®	Full				
Polio	08/18/2014	1 of 4	Pediarix ®	Full	No			
	12/01/2014	2 of 4	IPOL ®			Yes	Yes	
Rotavirus	05/10/2014	1 of 2	Rotarix ®		No		Yes	

Vaccine Group: This is the vaccine group name.

Date Administered: This date is the actual day the patient was given the vaccine. To view the tracking schedule information for the selected immunization, or an explanation of why an immunization is not valid or appropriate, click on this date.

Series: This column denotes the sequence number within the immunization series. A vaccine may show as invalid because the patient was not old enough to receive it or not enough time has elapsed between doses. Were the patient beyond the age for which the immunization could be considered valid, nothing will display. ”Partial Dose” will display if the shot is flagged as a partial dosage, see the *Editing Owned Immunizations from Inventory* section for more information.

Trade Name*:* This is the manufacturer’s trade name of the vaccine.

Dose: This column indicates whether full, half or multiple doses were administered to the patient. This does not indicate dose size in milliliters

Owned?: If the value in the owned column is blank, the immunization data is owned by your organization. This would be a result of either manual data entry or having sent it via data exchange. This is only an indication of the organization submitting the data; it has nothing to do with the organization that administered the shot to the child.

If the value in the owned column is "no," the immunization data are not owned by your organization. This indicates that your organization did not enter the shot information into IRIS. Click on "no" to find out who owns the shot information.

Reaction: If this column indicates "Yes" and appears in red, this means a reaction to a vaccine was recorded. To view the patient's reaction, click on the "Yes" link in the Reaction column or click on the notepad icon in the "Edit" column.

Hist?: If this column indicates "Yes," this record is historical, meaning the immunization was administered by a provider at another organization, not the organization that owns the data. Historical immunizations will be editable by all organizations. If this column is blank, this indicates the immunization was administered by the organization that owns the data (i.e. entered the data into IRIS) and only this organization will be able to edit this record.

Edit: When you click on the notepad icon in this column, you will be able to edit some fields for the recorded immunization using the Edit Immunization screen, as long as the immunization is owned by your organization or is historical.

Note: Owned vs. Not Owned Immunizations

A single provider does not own any of the patients within IRIS, but an organization does own the immunization data it enters into IRIS. If the "Owned" column on the immunization History table shows a "No" for one or more vaccines, this indicates that another organization entered the vaccine information and is attesting to the validity of the information. Any provider may edit a historical immunization, but "new" (non-historical) shots may only be edited by the organization that administered the vaccine and entered the data in IRIS.

Validation of Combination *vaccines*

IRIS validates each vaccine group component separately when recording combination vaccines. For example, if Comvax, which is a combination of Hib and Hep B was administered, and only one component is valid, that component will be treated as if it were a single vaccine and validated. The other component will be displayed as “Not Valid”. The component that is not valid will not be counted in series.

Vaccines Recommended by Selected Tracking Schedule

This table lists all vaccines recommended by the ACIP tracking schedule associated with the patient. Immunizations are listed alphabetically.

Current Age: 1 year, 10 days

Vaccines Recommended by Selected Tracking Schedule [Add Selected]

Select	Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
☐	DTP/aP		**03/08/2015**	06/08/2015	10/08/2015
☐	HepA		06/20/2015	06/20/2015	03/08/2016
	HepB	**Complete**			
☐	Hib		04/26/2015	04/26/2015	07/08/2015
☑	Influenza		12/13/2014	12/13/2014	**01/15/2015**
☑	MMR		03/08/2015	**03/08/2015**	07/08/2015
☑	Pneumococcal	Pneumo-Conjugate 13	04/19/2014	05/08/2014	**06/08/2014**
	Polio	**Contraindicated**			
	Rotavirus	**Maximum Age Exceeded**			
	Varicella	**Immunity Recorded for Vaccine Group**			

Select: Vaccines that are equal to or past their recommended date are automatically selected in the Vaccines Recommended section. You may also manually check other vaccines for inclusion in the Vaccines Recommended section. When the Add Selected button is pressed the check marked selections will display on the next screen.

Vaccine Group: This column lists the vaccine group name. To view the tracking schedule information for the selected immunization, or an explanation of why an immunization is not valid or appropriate, click on the vaccine group name.

Vaccine: This column displays a vaccine name if a specific vaccine is recommended. The IRIS System Manager can choose to hide or display vaccine recommendations in a schedule

Earliest Date: This date is the earliest date that the patient may receive the vaccine.

Recommended Date: This date is the recommended date that the patient should receive the vaccine.

Past Due Date: This date is the date at which the patient is past due for the immunization. This will also trigger the use of an accelerated schedule for future immunizations.

Immunization Color Coding

The dates found in the Vaccines Recommended by Selected Tracking Schedule table can be shaded with color for emphasis. For a detailed listing of color definitions click on the online help icon on the Immunization History screen in IRIS. Some of the more common colors applied to the dates within the columns are defined as follows:

Green: will highlight dates in the Earliest Date, Recommended Date or Past Due Date column. Green shading indicates that today's date is equal to or past the highlighted date, and is before the next date milestone. Therefore the immunization is recommended to be administered now.

Pink: A row shaded pink indicates a reason the vaccine is not recommended.

Maximum Age Exceeded: Reflects whether a student has exceeded the maximum age to receive a specific vaccine. For instance, if a student has already reached the age of 5 and hasn't completed the Pneumococcal series, then the recommendation for Pneumococcal at the bottom of the student immunization history will show "Maximum Age Exceeded".

Maximum Doses Met or Exceeded for Vaccine Group: Indicates the maximum number of doses that can be administered for the specified vaccine series.

Complete: Indicates that an immunization series has been completed according to the ACIP schedule.

Contraindicated: Indicates that the patient comments include a contraindication to vaccine(s) within this vaccine group. A medical waiver form should be requested.

Immunity Recorded for Vaccine Group: Indicates that the patient comments include evidence of immunity or history of disease.

Other Features on the Immunization History Screen

The Immunization History screen contains links to other IRIS functions. These links are:

Edit Patient: Pressing this button will return you to the Demographic screen for the patient

Reports: Pressing this button will bring you to the Reports Available for This Patient screen. You may generate Patient-specific reports. Refer to Forms and Reports, Chapter 12, of this manual for more information.

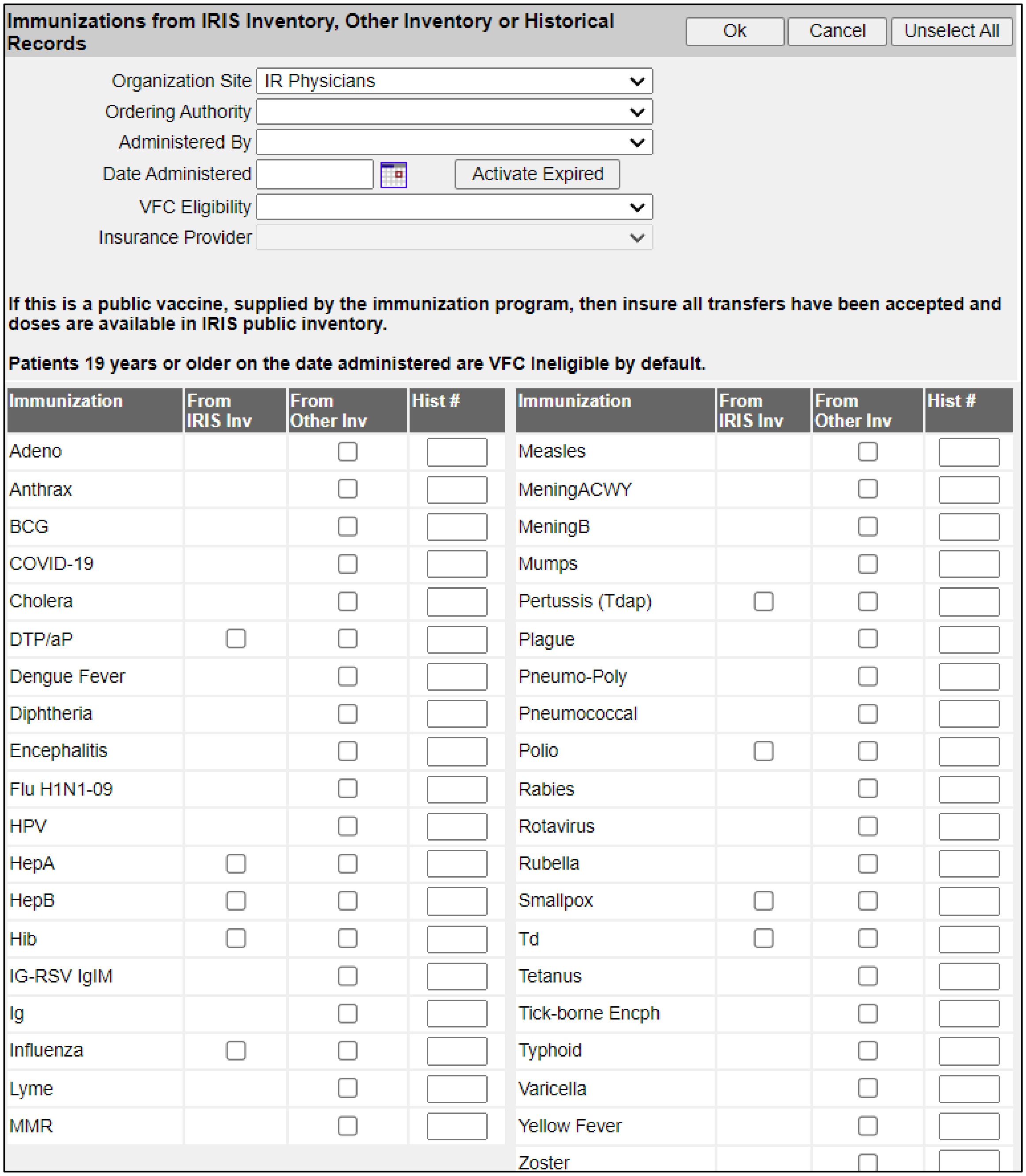
Print: Pressing this button will display the patient's immunization information without the top or side IRIS menus. To print this screen, click on the printer icon on your browser's tool bar or click File, Print and press OK. Press your browser's Back button to return to the patient screen.

Print Confidential: Pressing this button will display the patient's immunization information without top or side IRIS menus and without confidential patient information. To print this window, click on the printer icon on your browser or click File, Print, and press OK. Press your browser's Back button to return to the patient screen.

Entering Immunizations

To add new and/or historical immunizations, follow these steps:

1. To enter the pre-selected immunizations from the Vaccines Recommended Tracking Schedule, Press Add Selected within the tracking schedule.
2. To enter immunizations other than those pre-selected, press Add Immunization to display a list of immunizations on the IRIS, Other or Historical inventory screen.



Immunizations from IRIS Inventory, Other Inventory or Historical Records | Ok | Cancel | Unselect All

Organization Site: IR Physicians
Ordering Authority:
Administered By:
Date Administered: | Activate Expired
VFC Eligibility:
Insurance Provider:

If this is a public vaccine, supplied by the immunization program, then insure all transfers have been accepted and doses are available in IRIS public inventory.

Patients 19 years or older on the date administered are VFC Ineligible by default.

Immunization	From IRIS Inv	From Other Inv	Hist #	Immunization	From IRIS Inv	From Other Inv	Hist #
Adeno		☐		Measles		☐	
Anthrax		☐		MeningACWY		☐	
BCG		☐		MeningB		☐	
COVID-19		☐		Mumps		☐	
Cholera		☐		Pertussis (Tdap)	☐	☐	
DTP/aP	☐	☐		Plague		☐	
Dengue Fever		☐		Pneumo-Poly		☐	
Diphtheria		☐		Pneumococcal		☐	
Encephalitis		☐		Polio	☐	☐	
Flu H1N1-09		☐		Rabies		☐	
HPV		☐		Rotavirus		☐	
HepA	☐	☐		Rubella		☐	
HepB	☐	☐		Smallpox	☐	☐	
Hib	☐	☐		Td	☐	☐	
IG-RSV IgIM		☐		Tetanus		☐	
Ig		☐		Tick-borne Encph		☐	
Influenza	☐	☐		Typhoid		☐	
Lyme		☐		Varicella		☐	
MMR		☐		Yellow Fever		☐	
				Zoster		☐	

3. You may choose a default Organization Site, Ordering Authority, and Administered By value for new immunizations by choosing from the drop down lists in the New Immunizations section. You will be able to edit these fields for each immunization on the Record Immunizations screen. These fields are set up and managed by the Administrative user of IRIS for your organization. Refer to "Managing Clinicians" in Chapter 8 of the IRIS User Manual.

4. Choose a date for the Date Administered field using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. If using the calendar icon, choose a month and year from the drop down lists provided and choose a day by clicking on the appropriate calendar day. If you leave this field blank, IRIS will default the date administered to the current day.
5. Choose a VFC Eligibility. The VFC eligibility is populated based on the patient's age on Date Administered
6. Choose an Insurance Provider when VFC eligibility is not blank. The Insurance Provider will not be editable when no VFC eligibility is selected(blank)
7. The message below Insurance Provider describes the VFC Eligibility and Insurance Provider requirements.
8. Select the check boxes in the **From IRIS Inv or From Other Inv** column for the vaccines that were given by your organization.
   - **'From IRIS Inv'** means the provider is administering a new immunization from Inventory managed in the IRIS Inventory module. Doses given will be automatically decremented in IRIS inventory on hand accordingly.
   - **'From Other Inv'** means the provider is administering a new immunization from Inventory managed locally outside of the IRIS Inventory module, such as Immunizations given to adults from private funded inventory. Doses given will not impact IRIS Inventory on hand.
   - The column called **Hist#** allows the user to enter the number of historical immunizations being entered from another provider's records.
     - Select historical immunizations by typing the number of immunizations administered for each vaccine into the text box in the **Hist #** column. For example, if a patient received two historical DTaP vaccines, enter "2" in the **Hist #** box.
9. To advance to the Immunization Details screen, press OK.

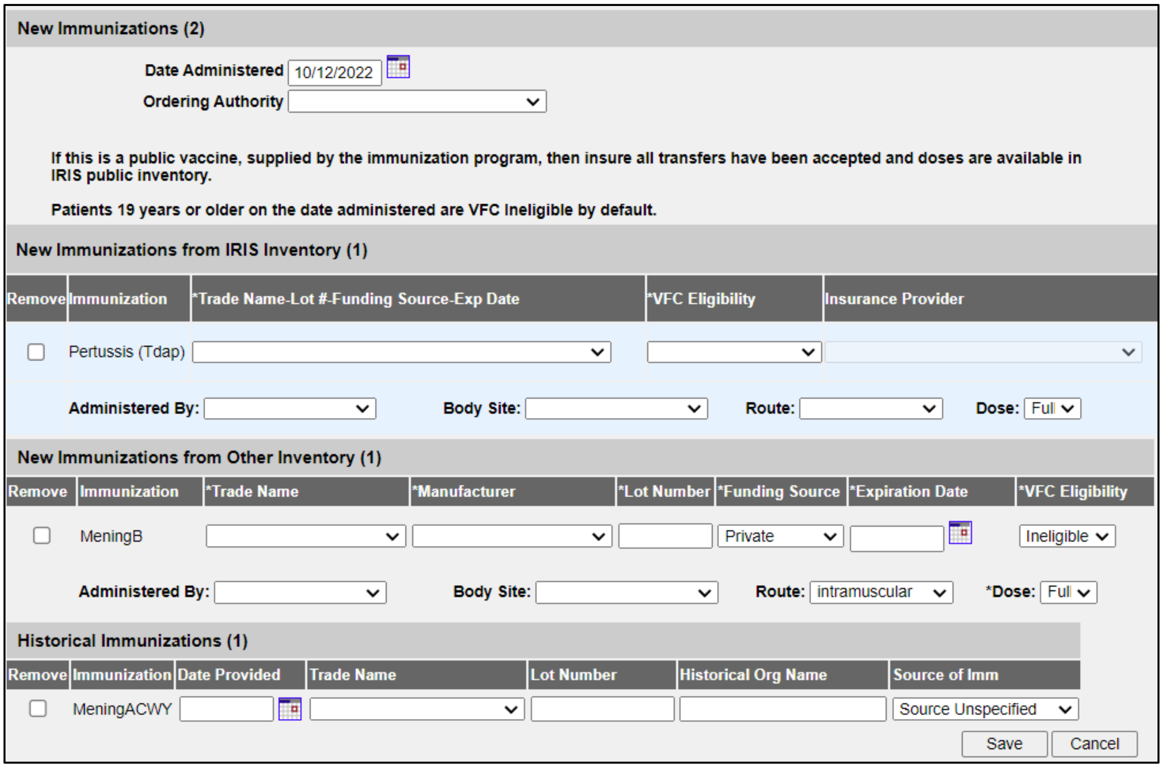
Note: When you go to the Immunization Details screen to select the "Trade Name – Lot" from IRIS inventory, the vaccines displayed in the drop down list will reflect the inventory of the current date, rather than the date the immunizations may have actually occurred. To adjust the vaccine listing to reflect the inventory of a past date, follow these steps:

1. On the IRIS, Other or Historical inventory screen, enter the Date Administered.
2. Press the Activate Expired button to the right of the Date Administered fields.

   For additional instruction on this feature, contact the IRIS Help Desk.

Immunization Detail Entry Screen

1. After selecting OK from the IRIS, Other or Historical Inventory screen, the Immunization Detail Entry Screen will display:



New Immunizations (2)

Date Administered 10/12/2022

Ordering Authority

If this is a public vaccine, supplied by the immunization program, then insure all transfers have been accepted and doses are available in IRIS public inventory.

Patients 19 years or older on the date administered are VFC Ineligible by default.

New Immunizations from IRIS Inventory (1)

Remove	Immunization	*Trade Name-Lot #-Funding Source-Exp Date	*VFC Eligibility	Insurance Provider
☐	Pertussis (Tdap)			

Administered By: Body Site: Route: Dose: Full

New Immunizations from Other Inventory (1)

Remove	Immunization	*Trade Name	*Manufacturer	*Lot Number	*Funding Source	*Expiration Date	*VFC Eligibility
☐	MeningB				Private		Ineligible

Administered By: Body Site: Route: intramuscular *Dose: Full

Historical Immunizations (1)

Remove	Immunization	Date Provided	Trade Name	Lot Number	Historical Org Name	Source of Imm
☐	MeningACWY					Source Unspecified

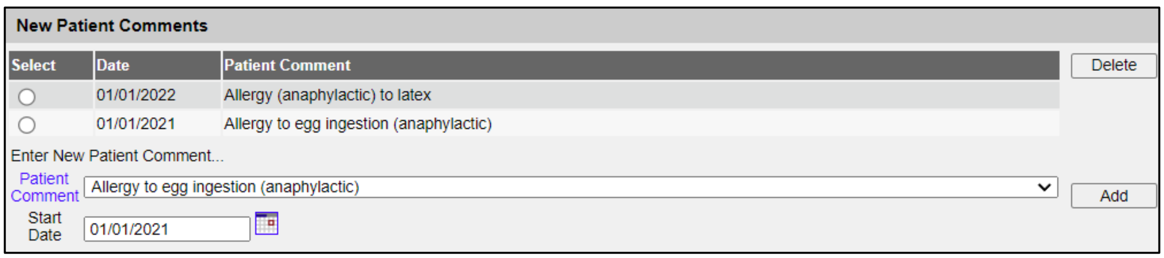
Save Cancel

2. New Immunizations - Verify or enter the Date Administered and Ordering Authority for the new immunization(s) listed in the New Immunizations table.
3. The Immunization rows are displayed with alternating background colors to differentiate the immunizations
4. Place a check in the Remove check box only if this immunization should not be entered into the IRIS database. For example, if IRIS informs you that the immunization is a duplicate, you should remove or modify the entry.
5. New Immunizations from IRIS Inventory (X)
   - The Trade Name, Lot Number, Funding Source and Lot Expiry Date are combined into a single field. Choose a Trade Name-Lot-Funding Source-Exp Date from the drop down list for the listed vaccine. This is a required field for all new immunizations from IRIS Inventory.
   - Choose a VFC Eligibility for the new immunization based on the Date Administered and Funding Type of the Lot.

- Choose an Insurance Provider based on the Date Administered, Funding Type of the Lot and VFC Eligibility. Insurance Provider will not be editable when VFC Eligibility is empty.
- Administered By: This field should be filled with the name of the clinician that administered the immunization.
- Body Site: This field should be filled with the area of the body where the immunization was given.
- Route: This field should be filled with the method of administration; for example, intramuscular, oral, etc. This field will display default data.
- Dose: This field should be filled with the dosage given to the patient. Use the drop down list to select full, half, or multiple doses.

6. New Immunizations from Other Inventory (X)
    - Select the Trade Name from a list of current trade names available in the U.S. . This is a required field for all new immunizations from IRIS Inventory.
    - Manufacturer will be populated from a list of current manufacturers for the trade name selected. This is a required field for all new immunizations from IRIS Inventory.
    - Type in the Lot Number of the vaccine lot administered. This is a required field for all new immunizations from IRIS Inventory.
    - Select the Funding Source of the vaccine lot administered This is a required field for all new immunizations from IRIS Inventory.
    - Enter the Expiration Date of the vaccine lot administered. Expiration date must be in MM/DD/YYYY format and cannot be before the administered date. This is a required field for all new immunizations from IRIS Inventory.
    - VFC Eligibility will default to Ineligible.
    - Administered By: This field should be filled with the name of the clinician that administered the immunization.
    - Body Site: This field should be filled with the area of the body where the immunization was given.
    - Route: This field should be filled with the method of administration; for example, intramuscular, oral, etc. This field will display default data.
    - Dose: This field should be filled with the dosage given to the patient. Use the drop down list to select full, half, or multiple doses.

7. Historical Immunizations X)
    - Under Historical Immunizations, enter a Date Provided in MM/DD/YYYY format. This is a required field for all historical immunizations
    - Select Trade Name if known.
    - Type in Lot Number if known.
    - Enter Historical Org Name if known.
    - Select Source of Immunization information.
8. Under Patient Comments, select a comment or refusal from the drop down list, if applicable. Enter an 'Start Date'
    - for each comment, then press Add to enter a new comment. You may also click the radio button next to an existing comment and press Delete to remove it.



9. When immunization details are complete, press Save.
10. IRIS will take you back to the Immunization History screen and display the newly entered vaccines with dates and validation, in addition to updated vaccine recommendations.

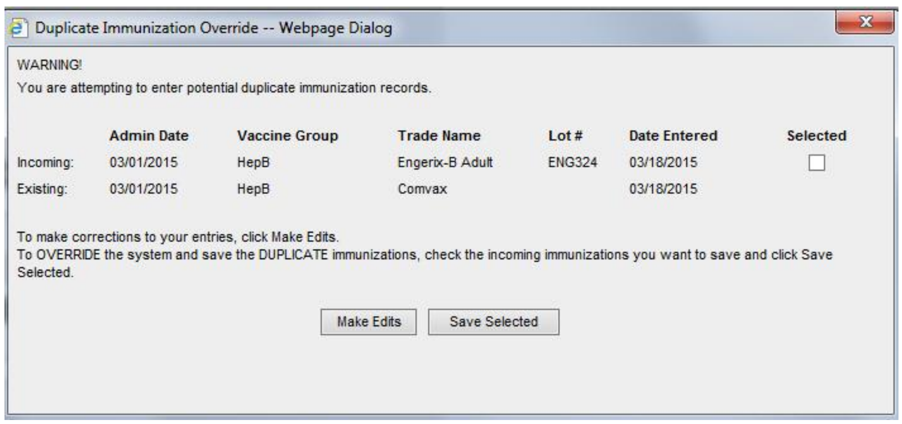
Note: At the bottom of the Immunization Details Entry screen, default VIS dates will be displayed for each new immunization entered. To change the default VIS date, follow the instructions under the "Editing Owned Immunizations from Inventory" section of this chapter.

Duplicate Immunizations

IRIS does not allow duplicate immunizations to be entered for a patient. If you attempt to enter an immunization for a patient given within two days before or after an existing immunization with the same trade name, you will receive the message, "Possible duplicate immunizations exist. Modify or delete your entries." IRIS will then allow you to change or delete the entry(s) in question.

If you receive a duplicate immunization override warning, follow these steps:

1. In the duplicate immunization override warning dialog box, review all immunizations to determine whether there are any duplicates. If the immunization(s) you entered need to be removed or edited, press "Make Edits". At the Record Immunization screen, make changes or remove immunizations as needed. Press OK.



2. If an Immunization(s) listed in the warning dialog box is not a duplicate, select the checkbox(es) next to the immunization(s) to enter it as a separate vaccine event and press Save Selected.

Note: The following scenarios explain how IRIS overrides duplicate immunization records:

- If there is a historical immunization on file and the same immunization is entered from IRIS inventory, no warning message will appear; instead it processes the new immunization and removes the historical immunization.

Applying a Prerequisite Override to a Patient's Immunization

A prerequisite override is a command within a tracking schedule that allows users to override a prerequisite vaccine once a patient reaches a certain age. A prerequisite override is not automatically applied to an individual patient's immunization record. To apply a prerequisite override to an immunization, follow these steps:

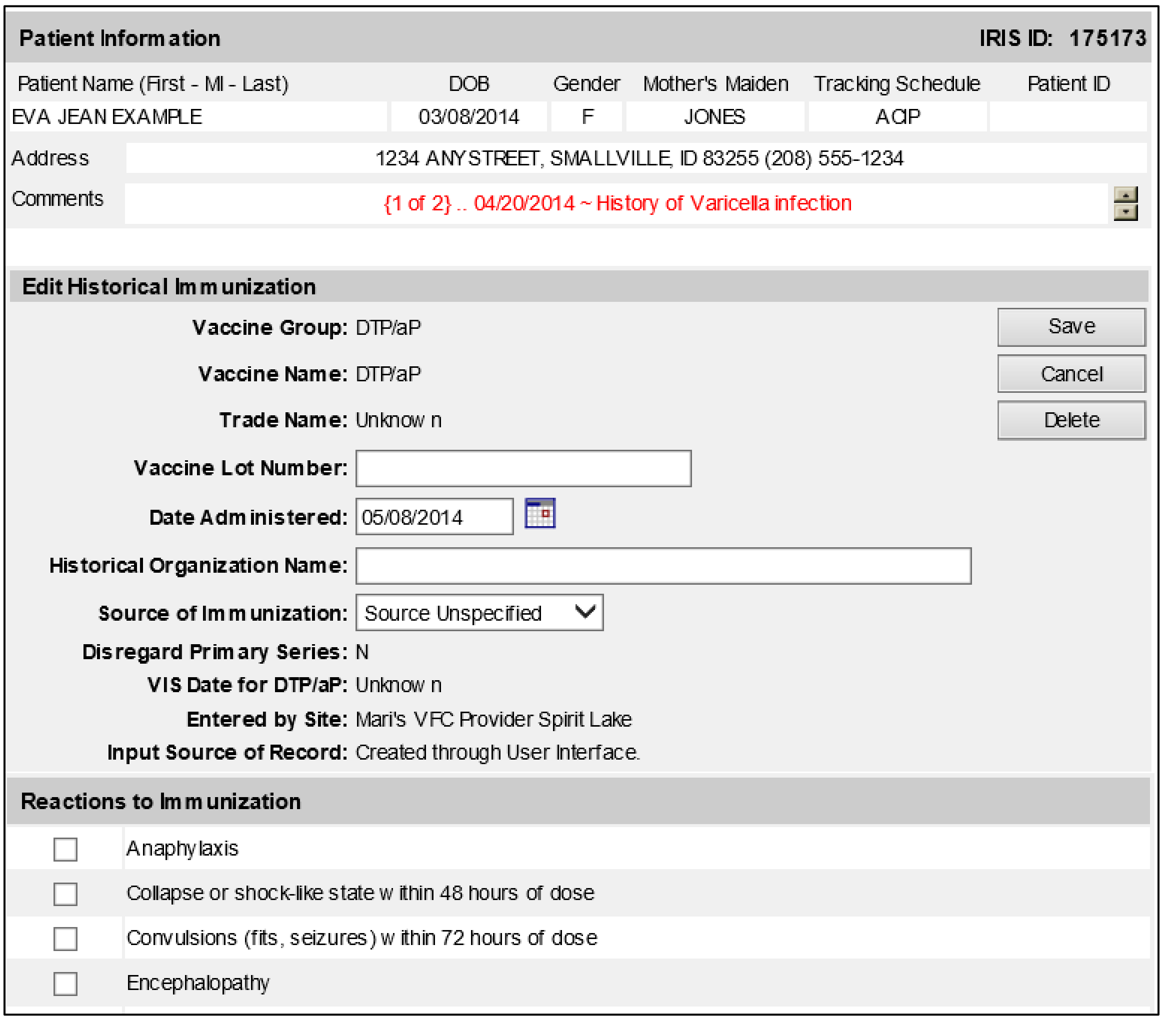
1. Enter the immunization as described in the Entering Immunizations section of this chapter. You may notice that, as in the case of Td, the immunization will appear on the immunization history as one of a series, when in fact it is a booster immunization. The next two steps will correct this.
2. Follow Steps 1-3 in the Editing Owned Immunization from Inventory section of this chapter.
3. In the field marked Disregard Primary Series, choose yes. Note: this field will only appear open if the conditions (the chosen tracking schedule has an override on the vaccine and the age of the patient is greater than or equal to the override age) meet those of the prerequisite override.
4. Press **Save**.

Editing Immunizations

Editing Historical Immunizations

To edit a historical immunization, use the following steps:

1. On the Immunization History table, select the historical vaccine record you wish to edit by clicking on the vaccine's notepad icon in the "Edit" column.



Patient Information — IRIS ID: 175173

Patient Name (First - MI - Last)	DOB	Gender	Mother's Maiden	Tracking Schedule	Patient ID
EVA JEAN EXAMPLE	03/08/2014	F	JONES	ACIP	

Address: 1234 ANYSTREET, SMALLVILLE, ID 83255 (208) 555-1234

Comments: {1 of 2} .. 04/20/2014 ~ History of Varicella infection

Edit Historical Immunization

Save | Cancel | Delete

Vaccine Group: DTP/aP
Vaccine Name: DTP/aP
Trade Name: Unknown
Vaccine Lot Number:
Date Administered: 05/08/2014
Historical Organization Name:
Source of Immunization: Source Unspecified
Disregard Primary Series: N
VIS Date for DTP/aP: Unknown
Entered by Site: Mari's VFC Provider Spirit Lake
Input Source of Record: Created through User Interface.

Reactions to Immunization

- [ ] Anaphylaxis
- [ ] Collapse or shock-like state within 48 hours of dose
- [ ] Convulsions (fits, seizures) within 72 hours of dose
- [ ] Encephalopathy

2. In the Edit Historical Immunization screen, you may edit information for the Vaccine Lot Number, Date Administered, Provider Organization Name and Source of Immunization Fields.
3. To record a reaction to a vaccine, check the box to the left of the reaction in the Reactions to Immunization section.
4. Press Save.

Deleting Historical Immunizations

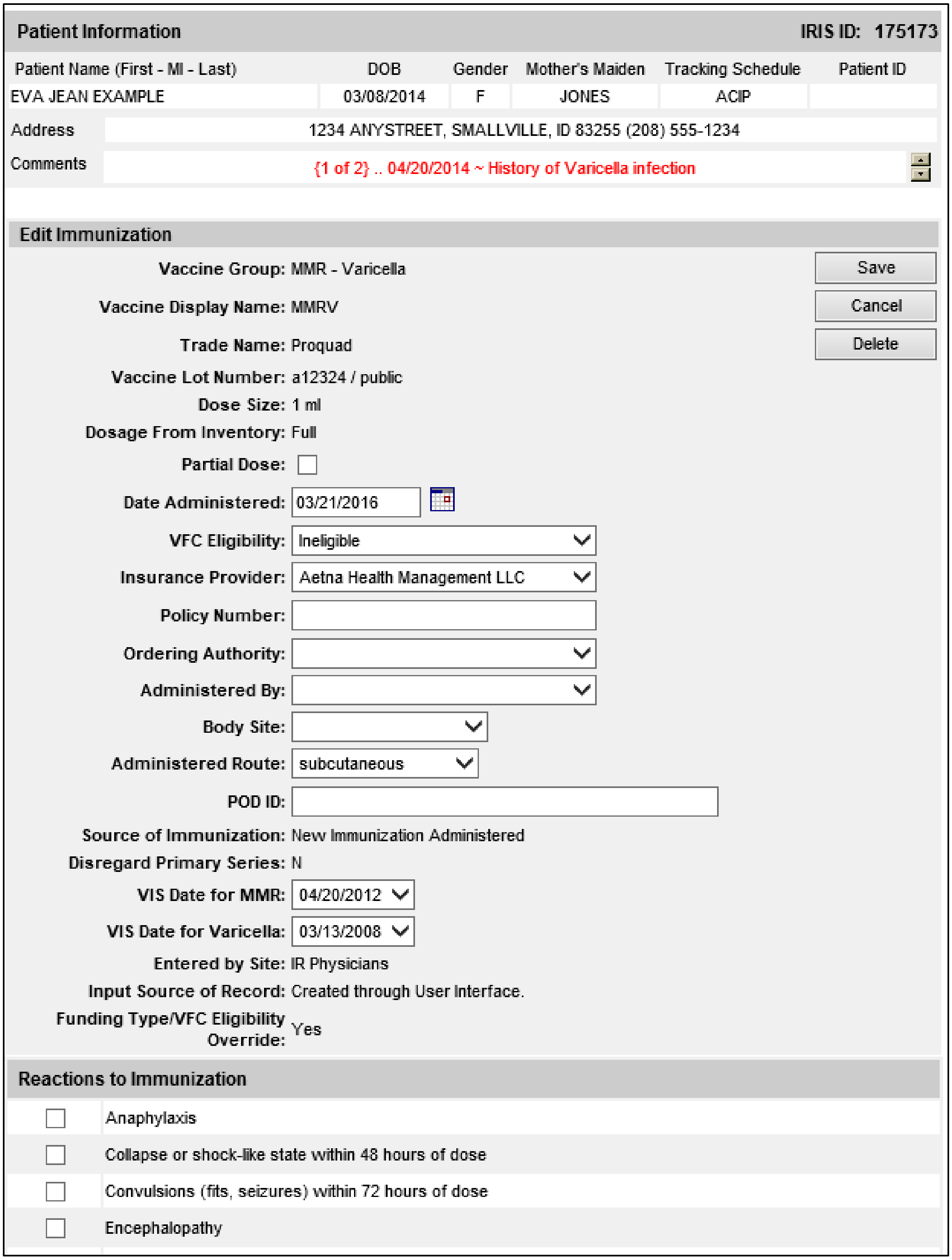
To delete a historical immunization, follow these steps:

1. On the Immunization History table, select the historical vaccine record you wish to delete by clicking on the vaccine's notepad icon in the "Edit" column.
2. At the Edit Historical Immunization screen, press Delete.
3. Press OK in the confirmation box.

Editing Owned Immunizations from Inventory

An immunization that is not historical is one that was given out of an organization's inventory. You will not be able to edit non-historical immunizations that are owned by another organization. To edit an immunization record that is an owned immunization, administered by your organization, follow these steps:

1. On the Immunization History table, select the vaccine record you wish to edit by clicking on the vaccine's notepad icon in the "Edit" column.



Patient Information IRIS ID: 175173

Patient Name (First - MI - Last)	DOB	Gender	Mother's Maiden	Tracking Schedule	Patient ID
EVA JEAN EXAMPLE	03/08/2014	F	JONES	ACIP	

Address: 1234 ANYSTREET, SMALLVILLE, ID 83255 (208) 555-1234

Comments: {1 of 2} .. 04/20/2014 ~ History of Varicella infection

Edit Immunization

Save
Cancel
Delete

Vaccine Group: MMR - Varicella
Vaccine Display Name: MMRV
Trade Name: Proquad
Vaccine Lot Number: a12324 / public
Dose Size: 1 ml
Dosage From Inventory: Full
Partial Dose:
Date Administered: 03/21/2016
VFC Eligibility: Ineligible
Insurance Provider: Aetna Health Management LLC
Policy Number:
Ordering Authority:
Administered By:
Body Site:
Administered Route: subcutaneous
POD ID:
Source of Immunization: New Immunization Administered
Disregard Primary Series: N
VIS Date for MMR: 04/20/2012
VIS Date for Varicella: 03/13/2008
Entered by Site: IR Physicians
Input Source of Record: Created through User Interface.
Funding Type/VFC Eligibility Override: Yes

Reactions to Immunization

Anaphylaxis
Collapse or shock-like state within 48 hours of dose
Convulsions (fits, seizures) within 72 hours of dose
Encephalopathy

2. To indicate a partial dosage, check the Partial Dose checkbox. For example, check this box if a partial dosage was administered because the needle broke or was removed too soon.

3. Update information in the Date Administered, VFC Eligibility, Insurance Provider, Policy Number, Ordering Authority, Insurance Provider (if VFC Ineligible), Insurance Policy Number if (VFC Ineligible), Administered By, Body Site and/or Administered Route fields on the Edit Immunization screen.
4. To indicate a Vaccine Information Statement (VIS) date other than the most current (default) date, choose an alternate date from the drop down list.
5. To record a reaction to the immunization, check the box next to the applicable reaction.
6. Press Save.

Deleting Owned Immunizations from Inventory

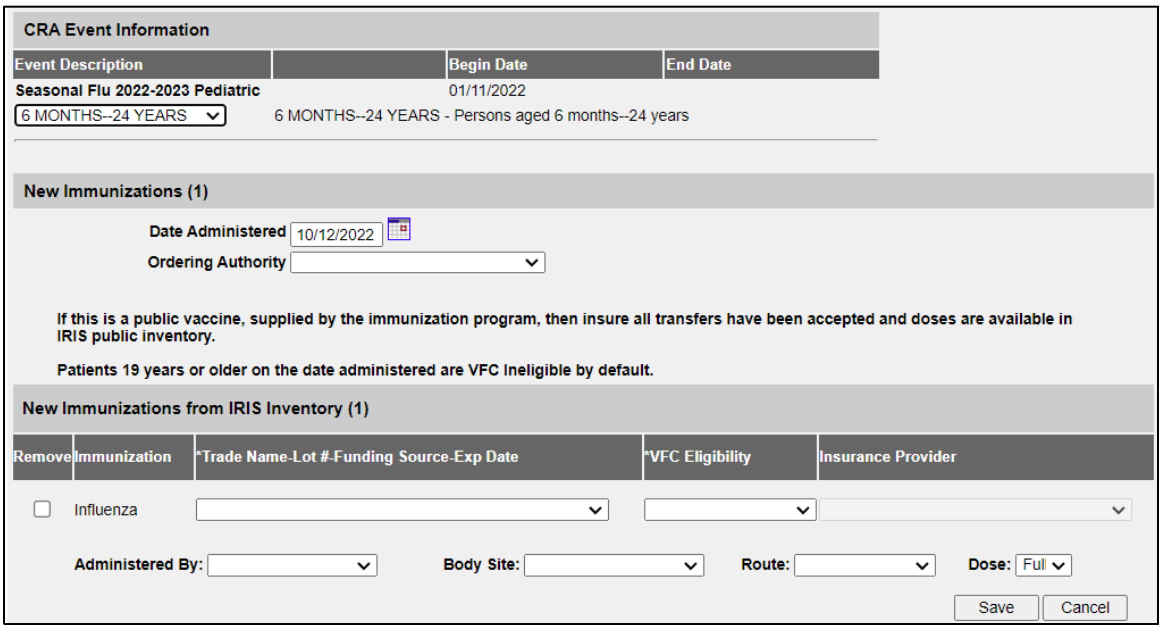
Note that you will not be able to delete non-historical immunizations that are owned by another organization.

1. On the Immunization History table, select the vaccine you wish to delete by clicking on the vaccine's notebook icon in the "Edit" column.
2. At the Edit Immunization screen, press Delete.
3. Press OK in the delete confirmation box.

Countermeasure and Response Administration (CRA)

In the event of a public health emergency, IRIS may be used to track the administration of vaccine. In some cases, specific patient groups may be identified as being at higher risk than the general population and targeted to receive the vaccination first. These groups are called priority groups.

The CRA Event Information section is used to collect Public Health data during a pandemic event or preparedness exercise (such as the response event to a Pandemic Influenza outbreak.) If your organization is selected for an event, then the CRA Event Information section will be displayed on the Record Immunizations screen. Based on candidate screening, select the appropriate priority group category for each patient.



Forms and Reports

In this chapter:

Forms

To access Forms, Click on the Forms menu option at the top of the page.

The following forms are available from the **Forms** menu:

- **Vaccine Administration Record**
  - Vaccine Administration Record – English
  - Vaccine Administration Record – Spanish
- **IRIS User Manual**
- **IRIS Data Exchange Specifications**
  - Flat File (FLATV4) Specifications
  - HL7 2.4 Specifications
  - HL7 2.5.1 Release 1.3 Specifications
  - HL7 2.5.1 Release 1.5 VXU Specifications
  - HL7 2.5.1 Release 1.5 Query Specifications
  - HL7 2.5.1 Appendix A (Code Value Sets)

Vaccine Administration Record

The Vaccine Administration Record allows you to print a blank Vaccine Administration Report in English or Spanish. Use this form to collect information on a patient who does not yet exist in the IRIS database. The responsible person's and clinician's signatures are also gathered on this form. To print out a New Patient Form, follow these steps:

1. Choose the language in which you would like the new patient form to display and select that hyperlink.
2. The form displays in Adobe Reader®
3. To print the report, press the printer icon on the Adobe® toolbar.
4. Press ***OK*** in the Print dialog box.
5. To return to the Forms screen, you may close Adobe Reader® by clicking the X in the upper right corner.

IRIS User Manual

The most current user manual can be downloaded by clicking on the IRIS User Manual link.

1. Click on the IRIS User Manual hyperlink
2. The form displays in Adobe Reader®
3. To print the report, press the printer icon on the Adobe® toolbar.
4. Press in the Print dialog box
5. To return to the Forms screen, you may close Adobe Reader® by clicking the X in the upper right corner.

Data Exchange Specifications

Provider organizations can send patient and immunization data to IRIS using batch or real time data exchange. IRIS supports several different file formats for data exchange with provider organizations.

1. Click on the desired specification hyperlink
2. The form displays in Adobe Reader®
3. To print the report, press the printer icon on the Adobe® toolbar.
4. Press in the Print dialog box
5. To return to the Forms screen, you may close Adobe Reader® by clicking the X in the upper right corner.

Tip: Not finding the Form you are looking for? Try Related Links option from the top menu in IRIS. Related Links will display links to other web sites containing information of interest to the immunization community and provider organizations. The list includes links to current VFC Provider information posted in the Idaho Immunization Program website.

Ad Hoc Reports

The Ad Hoc Reports function in IRIS allows the user to create customized reports. Filters within the Ad Hoc Reporting function help to narrow a search by date, site, vaccine group, ethnicity, and other factors. City and county public health departments may include in their reports patients associated with their departments or those living within the same city or county.

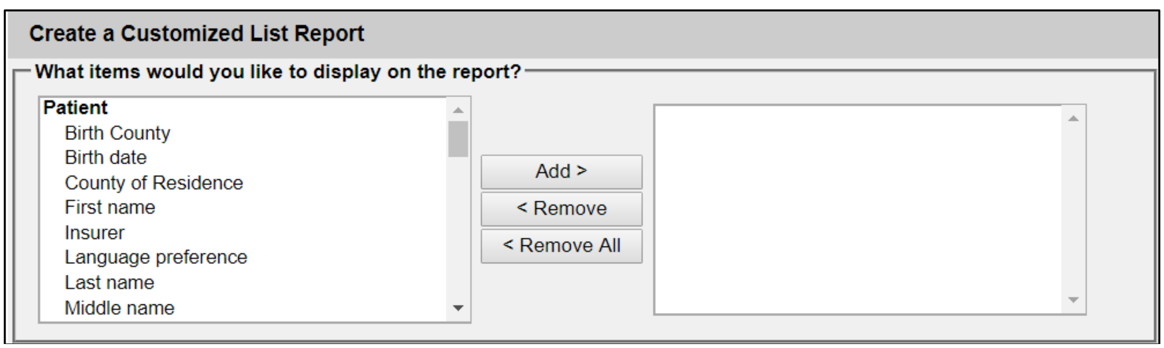
The Ad Hoc reporting function produces two types of reports; one type produces lists with information about selected patients, the other type produces counts, either of patients or of immunizations.

Note: Patients whose information is added or changed on the day the report is run may not appear in the results until the following day.

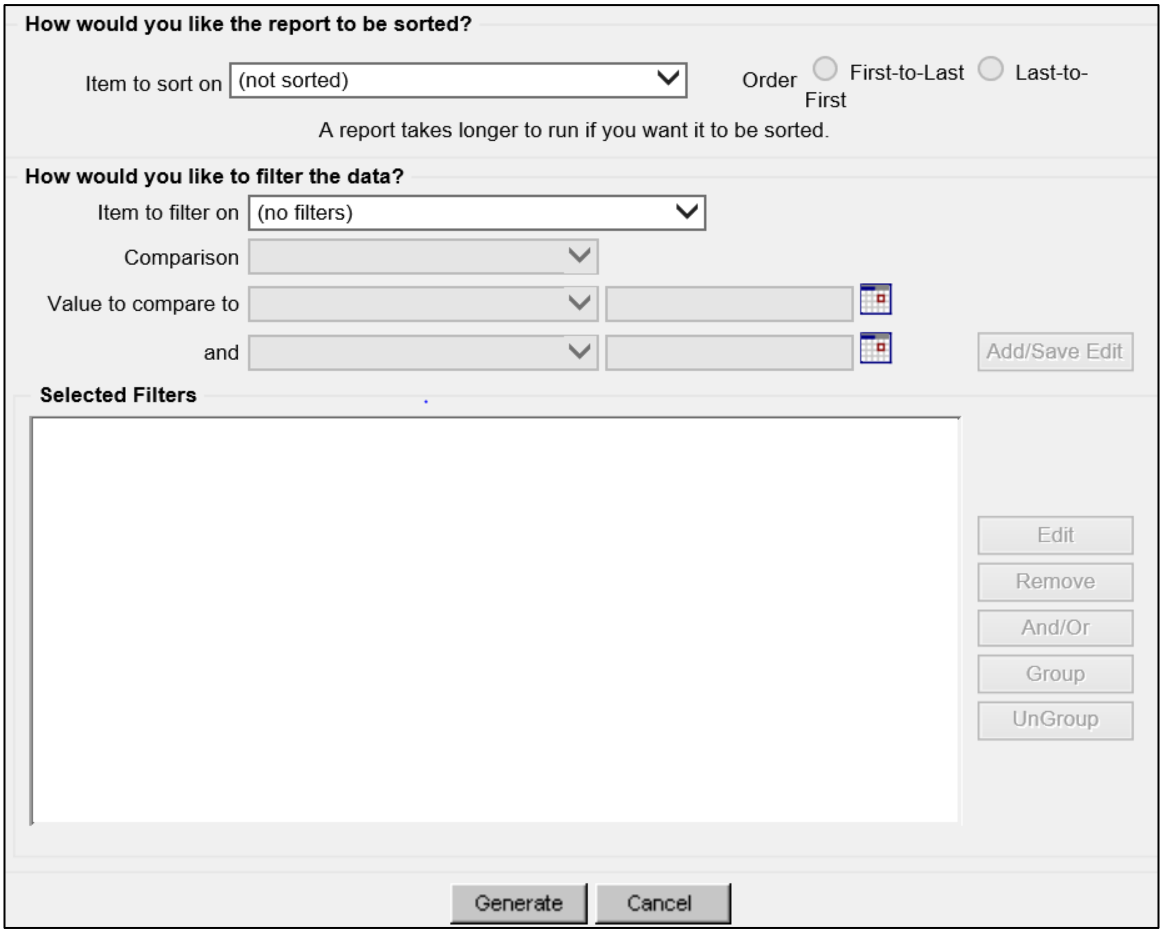
Ad Hoc List Reports

To produce a list of information about selected patients, follow these steps:

1. Click on **Ad Hoc List Report** under the Reports section of the menu panel.
2. Select the items that you would like to display on the report by double-clicking on the desired items from the left column (for example, Patient Last Name) or by highlighting the item and pressing **ADD**. This will copy the item to the right column and add it to your report.

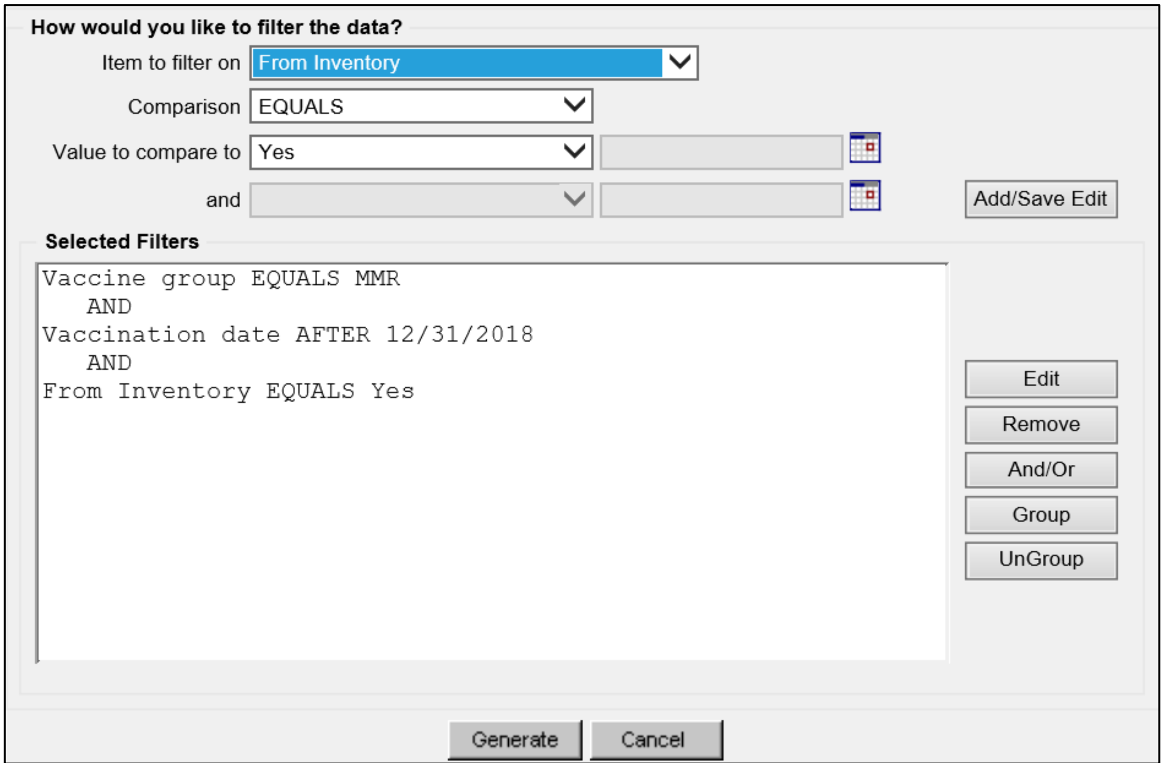


Select the single item by which you would like to have the report sorted and click on the sort order (first-to-last or last-to-first). Note: Sorting the report will increase the time it takes to process it.



3. Under “Item to filter on,” select an item that you would like to add as a filter using the drop down list provided. For example, “Birth Date Range” could be an item used as a filter.

   Filters in IRIS are used to narrow information down so that it answers a user’s query. An example of a filter item would be Birth Date Range (Item to filter on) BETWEEN (Comparison) 01/01/2004 (Value to compare to) AND 12/31/2004 (And).
4. Under Comparison,” select a word from the drop down list that best describes the type of comparison you wish to make. For example, “Between” is one comparison operator.
5. Under “Value to compare to,” either choose a value from the drop down list in the left field or enter a beginning date in the right field.
6. Under “and,” select another value from the drop down list in the left field or enter the ending date in the right field, if applicable.
7. Press ***Add/Save***. Repeat Steps 4-8 for each item you wish to filter.



8. When finished adding filter items, you may do the following:

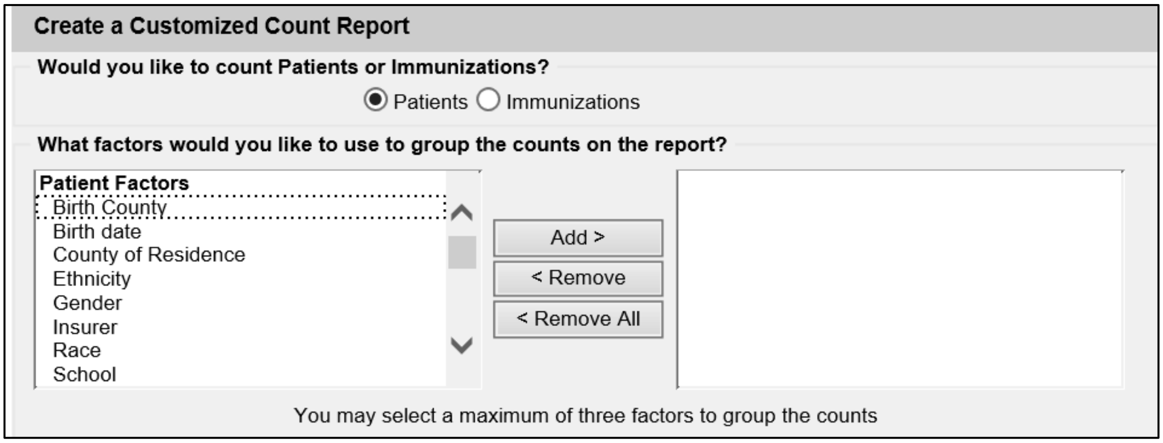
- Group them together by highlighting two filter statements and pressing ***Group.***
- Change "AND" to "OR" by highlighting "AND" and clicking on the ***And/Or*** button. "OR" can also be switched to "AND" by following the same process.
- Highlight a grouped statement and press ***Ungroup*** to ungroup it.
- Highlight a statement and press ***Remove*** to remove it from the selected filters.
- Highlight a statement and press ***Edit*** to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and press ***Add/Save***

10. Press ***Generate***. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.

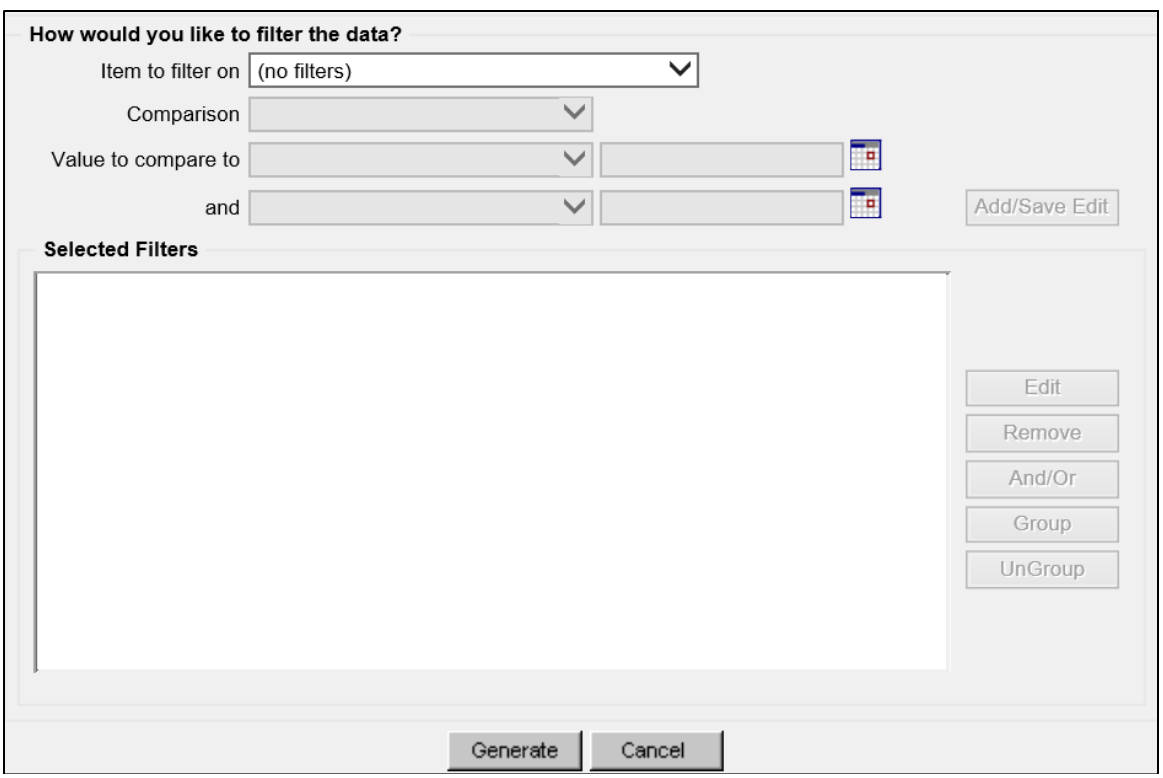
Ad Hoc Count Report

To produce a count of selected patients or immunizations, follow these steps:

1. Click **Ad Hoc Count Report** under the Reports section of the menu panel.



2. Select whether Patients or Immunizations will be counted by clicking the appropriate radio button at the top of the screen.
3. Select the factors you would like to use to group the counts on the report by double-clicking on the desired item from the left column (for example, Vaccine Group) or by highlighting the item and pressing ***Add***. This will copy the item to the right column so that it can be used in your report.



4. Under “Item to filter on” select an item that you would like to add as a filter using the drop down list provided. For example, “Birth Date Range” could be an item used as a filter.
5. Under “Comparison,” select a word from the drop down list that best describes the type of comparison you wish to make. For example, “Between” is one comparison operator.
6. Under “Value to compare to,” either choose a value from the drop down list in the left field or enter a beginning date in the right field.
7. Under “and,” select another value from the drop down list in the left field or enter the ending date in the right field, if applicable.
8. Press ***Add/Save***. Repeat Steps 4-8 for each item you wish to filter.
9. When finished adding filter items, you may do the following:
   - Group them together by highlighting two filter statements and pressing ***Group.***
   - Change “AND” to “OR” by highlighting “AND” and clicking on the ***And/Or*** button. “OR” can also be switched to “AND” by following the same process.
   - Highlight a grouped statement and press ***Ungroup*** to ungroup it.
   - Highlight a statement and press ***Remove*** to remove it from the selected filters.
   - Highlight a statement and press ***Edit*** to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and press ***Add/Save***
10. Press Generate. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.

Ad Hoc Report Status

1. The Ad Hoc Report Status screen will display after you press ***Generate*** on the Ad Hoc Count or Ad Hoc List Report screens, or you may access the status screen by clicking Ad Hoc Report Status under the Reports section of the menu panel.

Ad Hoc Report Status Refresh Cancel

Report Type	Started	Completed	Status	Row Count
COUNT	03/01/2019 10:33 AM	03/01/2019 10:33 AM	DONE	73
LIST	03/01/2019 10:32 AM	03/01/2019 10:33 AM	DONE	20

2. Press ***Refresh*** occasionally to check the status of the report. Once the underlined report type appears in blue, click it. The report will display directly on this screen.

3. If you wish to export the data as a text file, spreadsheet or PDF, select the appropriate link. Exporting an ad hoc report in a PDF file will allow you to print the report as a whole, rather than one page at a time.

4. If you wish to print the report, press ***Print*** under the File menu within the application (text file, spreadsheet or Adobe® Reader). In the print dialog box, adjust the print options as necessary, then press either ***Print*** or ***Ok***, depending on the application.

Note: Ad hoc reports are retained for 72 hours; IRIS will retain one count report and one list report for that period of time. If a new report of the same type is generated, the new report will replace the existing report.

Cold Storage Reports

The **Cold Storage Report** module is for the purpose of rendering a .pdf report of the cold storage records for an organization.

There are two screens associated with the **Cold Storage Report** module, the Cold Storage Report Request screen (Figure 3A) and the Cold Storage Report .pdf (Figure 3B).

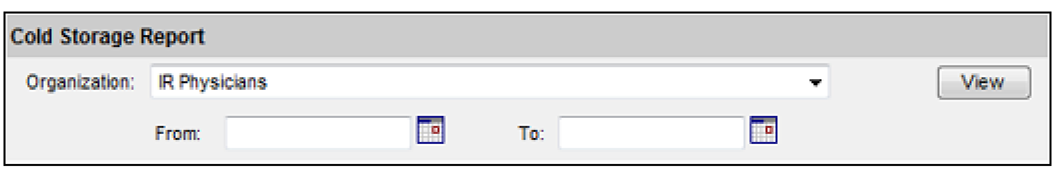
Cold Storage Report Request Screen

Select **Cold Storage Report** from the Reports section of the menu panel. Subsequently, Figure 3A will display.

From This Screen:

- Select your organization.
- Input the date range you intend to render the report for in MM/DD/YYYY format.
- Select the **View** button.

Figure 3A – Cold Storage Report Request Screen



Cold Storage Report .pdf

Upon selecting the **View** button from Figure 3A, the Cold Storage Report .pdf will render and Figure 3B will display.

Note: If you do not have Adobe Reader 6.0 or higher you will need to contact your administrator or select the **Forms** link at the top of the screen.

Figure 3B – Cold Storage Report .pdf

Immunization Reminder Information System (IRIS)

Cold Storage Report

Organization: IR Physicians | VFC PIN: 123456

Unit Name: Freezer | Acceptable Range (°F): -58 to 5

For Dates: 01/29/2012 through 01/30/2012

Date	Office Closed	Time	Temperature (°F)	Detail	Reported By
01/29/2012		12:45 AM	9	Out of Range	Rick Ruen
				No record found	
01/30/2012	X				Rick Ruen
		04:45 AM	5	In Range	Rick Ruen

<u>Background:</u>

- The rendered Cold Storage Report .pdf will contain one page or more for each cold storage unit within the organization that has at least one record recorded within the given date range.
- Each Cold Storage Units record will be displayed on a separate page.
- The configuration fields will display at the top of every page.

<u>Configuration Fields</u>

Organization: Organization for which the Cold Storage Report .pdf was rendered.

VFC Pin: The VFC Pin number for the organization.

Unit Name: Unit Name of the cold storage unit on that page.

Acceptable Range (°F): Acceptable temperature range for the unit displayed.

For Dates: Dates displayed within the report.

<u>Table Information</u>

Date: Date of the record.

Office Closed: An “X” will indicate office closed.

Time: Time the temperature was taken.

Temperature (°F): Temperature for the record. Both in range and out of range temperatures will display in this field.

Out of range temperatures will be shaded gray.

Detail: Will list Out of Range, No Record Found, In Range or will be blank.

Reported By: Will list the most recent user who edited the record.

From This Screen:

- Select **Print** from the Adobe menu to create a hard copy.
- Select **Back** from your browser to return to the previous page.

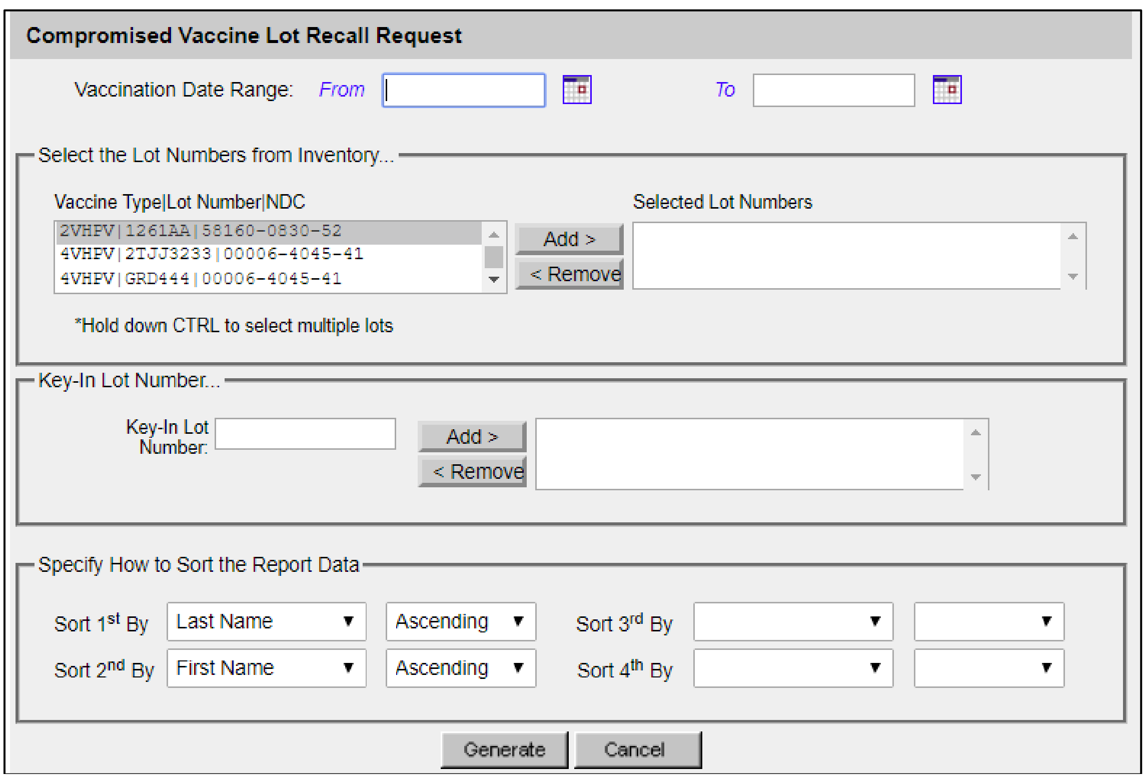
Compromised Vaccine Recall Report

IRIS now supports a compromised vaccine track and recall functionality. This functionality was developed for Idaho and is similar to the existing reminder/recall module. Users will be able to request a listing of patients active to a specific organization where immunizations from a particular vaccine type that are, for some reason, compromised and administered. This list will be compiled based on a particular or group of Lot numbers and a specific date range. The Compromised Vaccine Recall functionality will allow Local or Statewide Organizations to generate recall notification letters, mailing labels, and spreadsheet report that allows users to manage eligible patients.

Compromised Vaccine Lot Recall Request Screen:

The following steps are for both local and statewide users:

1. Select the Vaccine Recall link from the Reports Menu Group
2. Compromised Vaccine Lot Recall Request screen displays



3. Add the date range in the Vaccination Date Range. Dates can be added manually or using the calendar icon option.
4. Select the appropriate LOT #(s) that are included in the recall. This can be done in two different ways when selecting Lot # from the Lot Numbers from Inventory pick list. .
    - From the ‘Select The Lot Numbers from Inventory pick list users can select an individual or multiple Lot #s by clicking on the desired Lot #, which highlights the lot #
    - Hold down the CTRL button while making multiple selections.
5. Press the ADD button to move selected Lot #(s) over to the Selected Lot Numbers Box. The report will only pull data associated with the Lot numbers listed in this box. To omit any or all Lot #s listed, click the Remove button.
6. Users can also enter one or several Lot #s manually. This is done by adding the lot # (Lot # only) in the KEY-IN LOT NUMBER field. Select the ADD button to add lot # to the Selected Lot # box. Addition Lot numbers can be added following the same steps. Select the Remove button to remove a Lot # from the list. Only those Lot #s listed in the right side box will be included in the recall report.
7. Sort Options. These options are not required and have default sort preferences already in place. A user will be able to sort the data based on their preference. There are four tiers or priorities of sorting that can occur with five different types of criteria in an ascending or descending order. They are:
    a. Last Name
    b. First Name
    c. School
    d. Zip Code
    e. Lot #

    Note: Data sorts automatically by Last Name and then by First Name
8. Select the Generate Button

Compromised Vaccine Recall Status Screen

Once the recall request Generate button has been selected the Compromised Vaccine Recall Status screen will display. This screen will list the most recent requests generated, with the most recent listed at the top.

Compromised Vaccine Recall Status Screen

Refresh | Cancel

Started	Completed	Status	Patients	Vaccination From	Vaccination To
07/26/2012 02:28 PM	07/26/2012 02:28 PM	100 %	25	06/02/2012	07/22/2012
07/26/2012 01:34 PM	07/26/2012 01:34 PM	100 %	25	07/21/2012	07/21/2012
07/26/2012 11:04 AM	07/26/2012 11:04 AM	100 %	24	06/02/2012	07/20/2012
07/25/2012 10:05 AM	07/25/2012 10:05 AM	100 %	24	06/02/2012	07/20/2012
07/24/2012 11:26 AM	07/24/2012 11:26 AM	100 %	24	06/02/2012	07/20/2012
07/23/2012 03:53 PM	07/23/2012 03:53 PM	100 %	24	06/09/2012	06/09/2012

The request will be ready to process once the Status percentage has reached 100%. The request link will be enabled and turn to blue.

Select the appropriate request by clink the blue link under the Started column. This will navigate the user to the Compromised Vaccine Recall Process Summary screen.

Compromised Vaccine Recall Process Summary Screen:

This screen provides user with a summary of the patients who have met the Vaccine Lot criteria and are eligible for recall.

Compromised Vaccine Recall Process Summary

Step	Criteria Evaluated at this Step	Patients
1	Patients **associated** with *WeeKIDS_dRider_New ORg*.	25
2	Patients **immunized** by *WeeKIDS_dRider_New ORg* between 06/01/2012 and 07/22/2012.	24
3	Patients **immunized** by *WeeKIDS_dRider_New ORg* meeting **Vaccine Lot** criteria.	8
	Total Number of Patients Eligible for Recall	8

Compromised Vaccine Recall Output Options:

This screen allows a User to generate Recall Letters, Mailing Labels, and/or a Patient Information Spreadsheet.

Compromised Vaccine Recall Output Options

Output	Description	Additional Input
Recall Letter	Standard Compromised Vaccine Recall Letter.	Report Name Free Text Phone #
Mailing Labels	Avery Mailing Labels.	Report Name
Patient Information Spreadsheet	Spreadsheet Containing Eligible Patient Information.	Report Name

Cancel

To generate recall letters for patients that have been identified as eligible for recall a user will need to:

- Add the ‘reason for recall’ in the FREE TEXT box. This field allow the user to explain in the content of the letter the reason why a patient is being notified.
- Report Name – The report name for the report can be renamed if a user would like to distinguish their report from other reports. The default name for this report is “Vaccine Recall Letter.” This step is Optional.
- Select the blue ‘Recall Letter’ Link. This will generate recall letters for patients who have been identified for recall based on Lot # criteria. Selecting this link will navigate user to the Compromised Vaccine Recall Output Status screen.

Compromised Vaccine Recall Output Status

Name	Type	Requested	Started	Completed	Status
Vaccine Recall Letter	Compromised Vaccine Recall Letter	07/27/2012 01:01 PM	07/27/2012 01:01 PM	07/27/2012 01:01 PM	100%

Select the blue ‘Vaccine Recall Letter’ link to display recall letters in a separate window and in .pdf format.

Example: Compromised Vaccine Recall Letter

07/27/2012

Tony Tester
1213 Tester St
Boise, ID 83705

Dear (Parent/Guardian) of Tony Tester:

WeeKIDS_dRider_NewORg record's indicate that Tony Tester has received the following immunizations.

Immunization History	
Immunization	**Date Administered**
Acel-Imune	06/01/2012

Patients immunized on the dates listed with the above vaccine(s) will need to be re-vaccinated. The repeat dose is necessary because of a cold storage issue.. Please call our office to schedule an appointment.

We apologize for any inconvenience this may cause. If you have questions, please call our office at (801) 555-1515.

Sincerely,

WeeKIDS_dRider_NewORg

To generate Mailing Labels for patients that have been identified as eligible for recall a user will need to:

- Report Name – The report name for the report can be renamed if a user would like to distinguish their report from other reports. The default name for this report is "Vaccine Recall Label." This step is Optional.
- Select the blue 'Mailing Labels' Link. This will generate mailing labels for patients who have been identified for recall based on Lot # criteria. Selecting this link will navigate user to the Compromised Vaccine Recall Output Status screen.

Compromised Vaccine Recall Output Status

Name	Type	Requested	Started	Completed	Status
Vaccine Recall Label	Compromised Vaccine Recall Mailing Label	07/27/2012 01:07 PM	07/27/2012 01:07 PM	07/27/2012 01:07 PM	100%

Select the blue ‘Mailing Labels’ link to display the mailing labels associated with the recall letters in a separate window and in .pdf format.

Example: Mailing Labels

To the Parent/Guardian of:
PAGE PATIENT
HP TESTING CENTER #2
BOISE ID, 83705

To the Parent/Guardian of:
TANYA RIDER
1234 MAIN ST
SMALLVILLE ID, 83250

To the Parent/Guardian of:
TONY TESTER
1213 TESTER ST
BOISE ID, 83705

To the Parent/Guardian of:
WILLIAM TESTER
78910 LONG TEST ST
BOISE ID, 83705

Patient Information Spreadsheet:

To generate spreadsheet for patients that have been identified as eligible for recall a user will need to:

- Report Name – The report name for the report can be renamed if a user would like to distinguish their report from other reports. The default name for this report is “Patient Information Spreadsheet.” This step is Optional.
- Select the blue ‘Patient Information Spreadsheet’ link. This will generate mailing labels for patients who have been identified for recall based on Lot # criteria. Selecting this link will navigate user to the Compromised Vaccine Recall Output Status screen.

Compromised Vaccine Recall Output Status

Name	Type	Requested	Started	Completed	Status
Patient Information Spreadsheet	Compromised Vaccine Recall Spreadsheet	07/27/2012 01:55 PM	07/27/2012 01:55 PM	07/27/2012 01:55 PM	100%

Select the blue ‘Patient Information Spreadsheet’ or Report Name entered link to display all data associated with patients eligible for recall in a separate window in excel format. This spreadsheet can be viewed and/or saved.

Example: Patient Information Spreadsheet

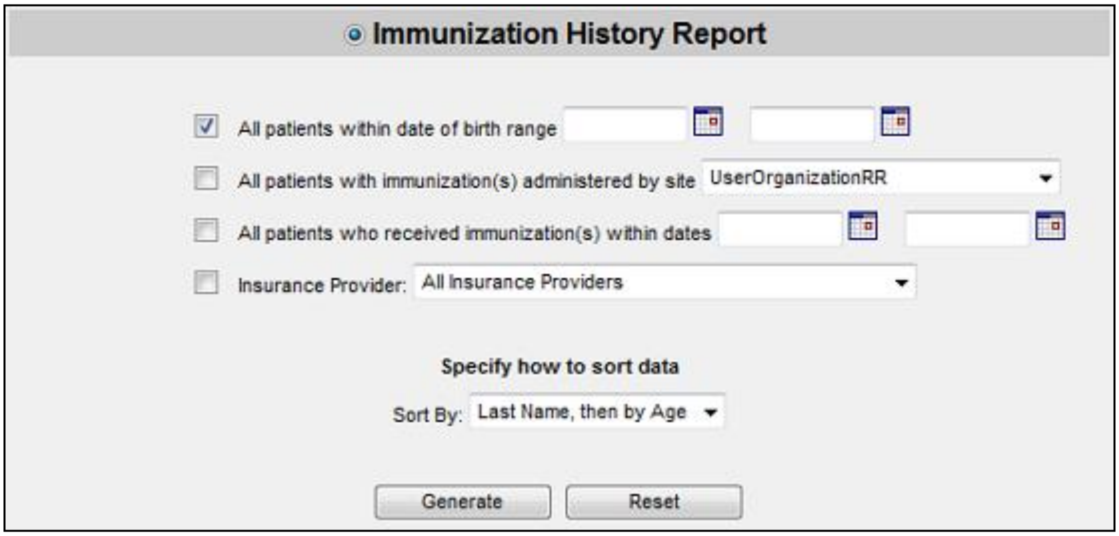
IRIS - Compromised Vaccine Recall Patient List 07/27/2012

IRIS Patient	Last Name	First Name	Date Of Birth	Gender	Street Address	P.O. Box	City	State	Zip	Phone Number	Address Incomplet	Vaccine Lot Number	Trade Name	Administration Date	Public /	Expiration Date of	Manufacturer of lot	Provider VFC	Provide
164057	Brown	Millie	01/01/200	Female	1235 Main St		Smallville	ID	83250		No	INF456Y	Infanrix	06/09/2012	Public	08/12/201	GlaxoSmith	131313	WeeKID
164356	Lunch	Alan	01/01/2001	Male	12 Main St		Smallville	ID	83250		No	INF456Y	Infanrix	07/20/2012	Public	08/12/201	GlaxoSmith	131313	WeeKID
164362	Lunch	Brian	01/15/2011	Male	205 Fort St		Smallville	ID	83250		No	INF456Y	Infanrix	07/20/2012	Public	08/12/201	GlaxoSmith	131313	WeeKID
163667	Patient	Page	05/01/200	Female	Hp Testing Center #2	11555	Boise	ID	83705	(208) 999-	No	123123123	Acel-Imune	06/06/2012	Public	12/21/2013	Wyeth-	131313	WeeKID
164055	Rider	Tanya	01/01/200	Female	1234 Main St		Smallville	ID	83250		No	INF456Y	Infanrix	06/09/2012	Public	08/12/201	GlaxoSmith	131313	WeeKID
164035	Tester	Tony	05/01/200	Male	1213 Tester St		Boise	ID	83705		No	123123123	Acel-Imune	06/01/2012	Public	12/21/2013	Wyeth-	131313	WeeKID
164288	Tester	William	12/19/2010	Male	78910 Long Test St	12345	Boise	ID	83705	(208) 745-	No	123123123	Acel-Imune	07/03/2012	Public	12/21/2013	Wyeth-	131313	WeeKID
164093	Testy	Sally	05/15/200	Unknow		123456	Boise	ID	83705		Yes	15141414-15	MMR II	07/05/2012	Public	12/09/201	Merck & Co,	131313	WeeKID

Group Reports

The purpose of Group Reports is to run either the Immunization History Report or Health Appraisal Form for a group of selected patients. To run one of these reports, complete the following steps:

1. Click on **Group Patients** under the Reports section of the menu panel.
2. On the Group Patients Screen, the Immunization History Report will be preselected to run.



3. To run for patients in a specific birth date range, click on the check box on the **first** line. Enter a from birth date and to birth date in MM/DD/YYYY format.
4. To run for patients who have immunizations administered by one of your sites, click the check box on the **second** line. Choose a site from the drop down list.
5. To run for patients who have an immunization in a specific date range, click the check box on the **third** line. Enter a From date and a To date in MM/DD/YYYY format.
6. To run for patients who have a particular insurer, click the check box on the **fourth** line. Choose an insurer from the drop down list.

Note: You may combine any of the criteria in the above steps. The system selects patients who fulfill all the criteria you specify.

7. Additionally, you may choose a sort order. Your two options are either by Last Name then Age or by Age, then Last Name.
8. If you wish to start over, click the ***Reset*** button. The system erases all the criteria you entered and starts with a fresh page. You may proceed to enter your criteria again.
9. When criteria are completed, click the ***Generate*** button. The system starts to

generate the report and takes you to the Check Group Status screen.

10. After the report finishes generating, the top line on the Check Group Status screen becomes a hyperlink. Click on the hyperlink.

Group Patient Reports Request Status				Refresh
Report Name	Started	Completed	Status	Patients
Immunization_History_Report	04/11/2011 03:40 pm	04/11/2011 03:40 pm	100%	5

11. The system displays the report output in PDF format.

Patient Reports (Individual)

For all patients in IRIS, you may generate the following reports from the Patient Reports Screen:

- Vaccine Administration Record
- Immunization History Report
- Immunizations Needed

Vaccine Administration Record

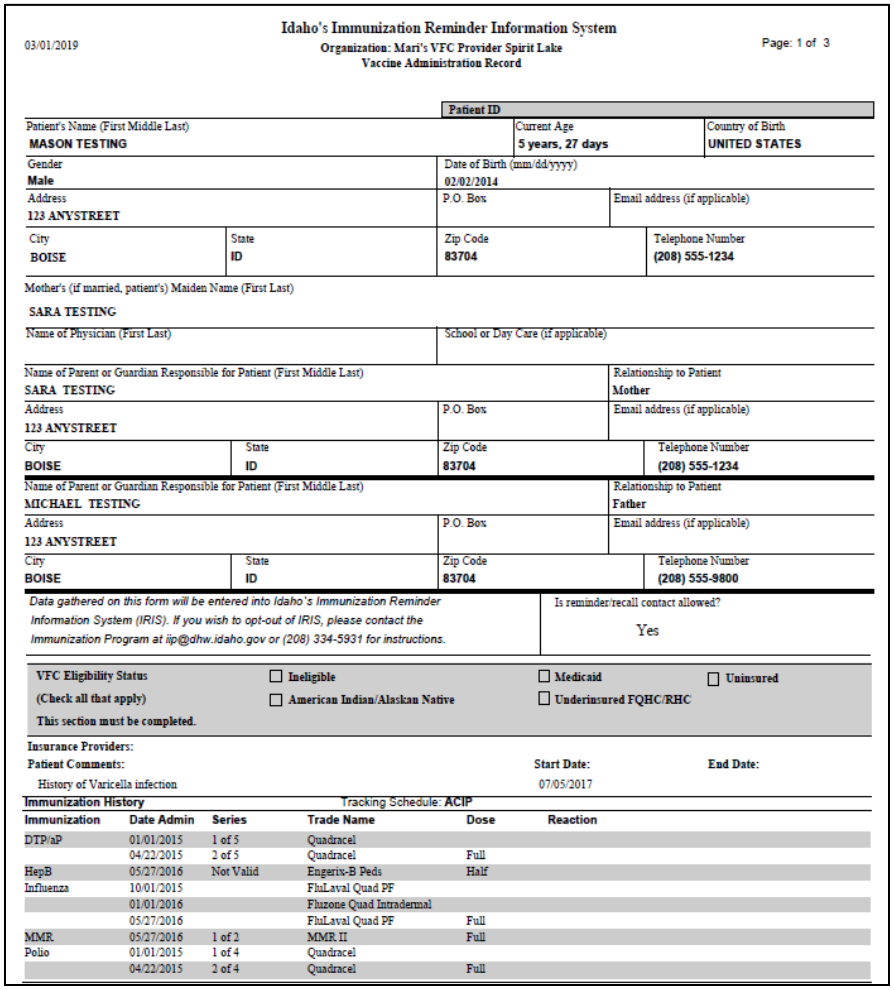
The Vaccine Administration Record displays demographics, contact information, and immunization history for the selected patient. The For Office section will display vaccine lots available in the provider organization's inventory. To generate the report, follow these steps:

1. From a patient's Manage Patient screen or Manage Immunizations screen, press Reports.
2. At the Patient Reports screen, choose your org name under the "Additional Information" column for the Vaccine Administration Record.

Reports Available for this Patient		
Report	Description	Additional Information
Vaccine Administration Record	The report will display the patient information, contact information, complete immunization history as well as immunizations available for administration.	Site: UserOrganizationRR Language: ENGLISH
Immunization History Report	Displays patient information, healthcare provider information, as well as complete immunization history.	None
Immunizations Needed	Displays patient information, contact information, complete immunization history and vaccines recommended for the future.	None

3. Click on Vaccine Administration Record, which is underlined and in blue text.

4. Once the report is generated, it will be displayed using Adobe Reader®. Refer to the Optimizing IRIS chapter in this manual for more information on Adobe Reader®.



03/01/2019

Idaho's Immunization Reminder Information System
Organization: Mari's VFC Provider Spirit Lake
Vaccine Administration Record

Page: 1 of 3

Patient ID

Patient's Name (First Middle Last)	Current Age	Country of Birth
MASON TESTING	**5 years, 27 days**	**UNITED STATES**

Gender	Date of Birth (mm/dd/yyyy)	
Male	**02/02/2014**	

Address	P.O. Box	Email address (if applicable)
123 ANYSTREET		

City	State	Zip Code	Telephone Number
BOISE	**ID**	**83704**	**(208) 555-1234**

Mother's (if married, patient's) Maiden Name (First Last)
SARA TESTING

Name of Physician (First Last)	School or Day Care (if applicable)

Name of Parent or Guardian Responsible for Patient (First Middle Last)	Relationship to Patient
SARA TESTING	**Mother**

Address	P.O. Box	Email address (if applicable)
123 ANYSTREET		

City	State	Zip Code	Telephone Number
BOISE	**ID**	**83704**	**(208) 555-1234**

Name of Parent or Guardian Responsible for Patient (First Middle Last)	Relationship to Patient
MICHAEL TESTING	**Father**

Address	P.O. Box	Email address (if applicable)
123 ANYSTREET		

City	State	Zip Code	Telephone Number
BOISE	**ID**	**83704**	**(208) 555-9800**

Data gathered on this form will be entered into Idaho's Immunization Reminder Information System (IRIS). If you wish to opt-out of IRIS, please contact the Immunization Program at iip@dhw.idaho.gov or (208) 334-5931 for instructions.

Is reminder/recall contact allowed?
Yes

VFC Eligibility Status ☐ **Ineligible** ☐ **Medicaid** ☐ **Uninsured**
(Check all that apply) ☐ **American Indian/Alaskan Native** ☐ **Underinsured FQHC/RHC**
This section must be completed.

Insurance Providers:
Patient Comments: **Start Date:** **End Date:**
History of Varicella infection 07/05/2017

Immunization History Tracking Schedule: **ACIP**

Immunization	Date Admin	Series	Trade Name	Dose	Reaction
DTP/aP	01/01/2015	1 of 5	Quadracel		
	04/22/2015	2 of 5	Quadracel	Full	
HepB	05/27/2016	Not Valid	Engerix-B Peds	Half	
Influenza	10/01/2015		FluLaval Quad PF		
	01/01/2016		Fluzone Quad Intradermal		
	05/27/2016		FluLaval Quad PF	Full	
MMR	05/27/2016	1 of 2	MMR II	Full	
Polio	01/01/2015	1 of 4	Quadracel		
	04/22/2015	2 of 4	Quadracel	Full	

03/01/2019

Idaho's Immunization Reminder Information System

Organization: Mari's VFC Provider Spirit Lake

Vaccine Administration Record

Page: 2 of 3

FOR OFFICE USE

Vaccine	VIS Date	Body Route	Body Site*	
DTP/aP	05/17/2007		RV LV RD LD BN	
HepA	10/25/2011	IM	RV LV RD LD BN	
HepB	02/02/2012	IM	RV LV RD LD BN	
Hib	04/02/2015	IM	RV LV RD LD BN	
HPV	04/15/2015	IM	RV LV RD LD BN	
Influenza	08/07/2015		RV LV RD LD BN	
	Fluarix Quad PF~FL999B~GlaxoSmithKline (SmithKline Beecham and Glaxo Wellcome)			
	Fluarix Quad PF~FL999B~GlaxoSmithKline (SmithKline Beecham and Glaxo Wellcome)			
MeningACWY	10/14/2011		RV LV RD LD BN	
	Menveo~MEND443K~GlaxoSmithKline (SmithKline Beecham and Glaxo Wellcome)			
	MenHibrix~MENI123~GlaxoSmithKline (SmithKline Beecham and Glaxo Wellcome)			
	Menveo~M14919M~GlaxoSmithKline (SmithKline Beecham and Glaxo Wellcome)			
	Menveo~ZA2393~GlaxoSmithKline (SmithKline Beecham and Glaxo Wellcome)			
MMR	04/20/2012	SC	RV LV RD LD BN	
Pertussis (Tdap)	02/24/2015		RV LV RD LD BN	
Pneumococcal	02/27/2013	IM	RV LV RD LD BN	
	Prevnar 13~HTHE893~Pfizer, Inc.			
	Prevnar 13~yrdy234~Pfizer, Inc.			
	Prevnar 13~PCV1213~Pfizer, Inc.			

5. To print the report, press the printer icon on the Adobe® toolbar. Press OK in the Print dialog box.
6. To return to the Patient Reports screen, you may close Adobe Reader® by clicking the X in the upper right corner of the Vaccine Administration Record window.

Immunization History Report

The Immunization History Report displays demographics, contact information, and a detailed summary of the patient's immunization history. This report will typically be used as an official school record. This report should be provided to parents and guardians, as requested. To generate the report, follow these steps:

1. From a patient's Manage Patient screen or Manage Immunizations screen, press Reports.
2. At the Patient Reports Patient screen, click on <u>Immunization History Report</u>, which is underlined and in blue text.
3. Once the report is generated, it will be displayed using Adobe Reader®. Refer to the Optimizing IRIS chapter in this manual for more information on Adobe Reader®.

03/01/2019

Idaho's Immunization Reminder Information System

Mari's VFC Provider Spirit Lake

Immunization History Report

Patient ID: Tracking Schedule: **ACIP**
Patient Name: **MASON TESTING**
Birth Date: **02/02/2014** Gender: **Male** Age: **5 years, 27 days**
Address: **123 ANYSTREET**
City: **BOISE** State: **ID** ZIP: **83704** Phone: **(208) 555-1234**

Immun	Date Admin	Series	Trade Name	Dose	Mfg Code	Lot #	Bod Rt.	Bod St.	Provider of Information	React
DTP/aP	01/01/2015	1 of 5	Quadracel	Full					IR Physicians	
DTP/aP	04/22/2015	2 of 5	Quadracel	Full	PMC	qUD534			IR Physicians	
HepB	05/27/2016	Not Valid	Engerix-B Peds	Half	SKB	ENG325	IM		Mari's VFC Provider Spirit	
Influenza	10/01/2015		FluLaval Quad PF	Full					Mari's VFC Provider Spirit	
Influenza	01/01/2016		Fluzone Quad Intradermal	Full					Mari's VFC Provider Spirit	
Influenza	05/27/2016		FluLaval Quad PF	Full	IDB	FLV944			Mari's VFC Provider Spirit	
MMR	05/27/2016	1 of 2	MMR II	Full	MSD	MYZ3988K	SC		Mari's VFC Provider Spirit	
Polio	01/01/2015	1 of 4	Quadracel	Full					IR Physicians	
Polio	04/22/2015	2 of 4	Quadracel	Full	PMC	qUD534			IR Physicians	

Reaction Descriptions:
No Records Found.

Patient Comments: **Start Date:** **End Date:**
History of Varicella infection 07/05/2017

Organization Name: **Mari's VFC Provider Spirit Lake**
Address: **4545 ELK ROAD**
City: **GENEVA** State: **WA** ZIP: **62624-7877** Phone: **(505) 887-5777 x78787**
Primary Care Provider:
Provider's Signature ______________________ Date: ____________
Per Idaho Code §39-1118 and §39-4801, this immunization record has been electronically signed.

4. To print the report, press the printer icon on the Adobe® toolbar. Press OK in the Print dialog box.
5. To return to the Patient Reports screen, you may close Adobe Reader® by clicking the X in the upper right corner of the Immunization History Report window.

Immunizations Needed Report

The Immunizations Needed report displays demographics, contact information, immunization history, and immunizations recommended by date according to the tracking schedule assigned to the patient. This report can be provided to parents and guardians for their records and helps to identify upcoming immunizations for their children. In addition, it provides a place for the next appointment date and organization phone number. To generate the report, follow these steps:

1. From a patient's Manage Patient screen or Manage Immunizations screen, press Reports.
2. At the Patient Reports screen, click on Immunizations Needed, which is underlined and in blue text.
3. Once the report is generated, it will be displayed using Adobe Reader®. Refer to the Optimizing IRIS chapter in this manual for more information on Adobe Reader®.

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Idaho's Immunization Reminder Information System

Mari's VFC Provider Spirit Lake

Immunization Record

Patient ID: Tracking Schedule: **ACIP**
Patient Name(F M L): **MASON TESTING**
Birth Date: **02/02/2014** Gender: **Male** Age: **5 years, 27 days**
Address: **123 ANYSTREET**
City: **BOISE** State: **ID** Zip: **83704** Phone: **(208) 555-1234**

Relationship: **Mother** Name (F M L): **SARA TESTING**
Address: **123 ANYSTREET**
City: **BOISE** State: **ID** Zip: **83704** Phone: **(208) 555-1234**
Relationship: **Father** Name (F M L): **MICHAEL TESTING**
Address: **123 ANYSTREET**
City: **BOISE** State: **ID** Zip: **83704** Phone: **(208) 555-9800**

Patient Comments — **Start Date:** — **End Date:**
History of Varicella infection — 07/05/2017

Immunization History Tracking Schedule: ACIP

Immunization	Date Admin	Series	Trade Name	Dose	Reaction
DTP/aP	01/01/2015	1 of 5	Quadracel		
	04/22/2015	2 of 5	Quadracel	Full	
HepB	05/27/2016	Not Valid	Engerix-B Peds	Half	
Influenza	10/01/2015		FluLaval Quad PF		
	01/01/2016		Fluzone Quad Intradermal		
	05/27/2016		FluLaval Quad PF	Full	
MMR	05/27/2016	1 of 2	MMR II	Full	
Polio	01/01/2015	1 of 4	Quadracel		
	04/22/2015	2 of 4	Quadracel	Full	

* Previous Influenza boosters are not displayed.

Vaccines Recommended by Selected Tracking Schedule	
Vaccine	**Date Needed**
Varicella	Immune
HepA	02/02/2015
DTP/aP	05/20/2015
Polio	05/20/2015
HepB	05/28/2016
MMR	02/02/2018
Influenza	08/01/2018
Td	02/02/2021
HPV	02/02/2025
MeningACWY	02/02/2025
Pertussis (Tdap)	02/02/2025

Appointment Date: _____/_____/______ Provider Phone Number: (505) 888-7787 x77777

Appointment Time: ____________________

MASON TESTING **02/02/2014**

4. To print the report, press the printer icon on the Adobe® toolbar. Press OK in the Print dialog box.
5. To return to the Patient Reports screen, you may close Adobe Reader® by clicking the “X” in the upper right corner of the Immunizations Needed Report window.

Reminder/Recall Reports

From the Reports menu option, you may generate reminder and recall notices, which include letters, mailing labels, and patient listings.

Note: Generation of reminder and recall notices

Reminder and recall notices can be generated for each patient, provided that the following conditions are met:

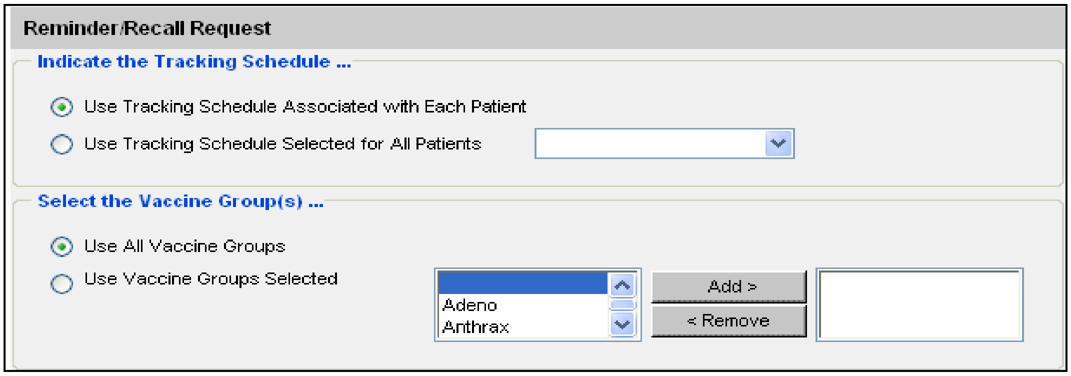
- The status is "Active" in the Patient Information Section for your organization.
- The "Allow Reminder and Recall Contact?" indicator in the Patient Information Section is "Yes."
- The patient has complete address information listed in the Address Information Section. If a patient has an insufficient address they will still be included within the report, yet many of the outputs will not be generated for this patient (i.e. Standard Patient Letter, Mailing Labels and any Custom Letters).

Reminder/Recall Requests

To select and submit reminder/recall criteria for patients, you will need to fill in the criteria on the Reminder Request screen. Follow these steps to generate reminder/recall requests:

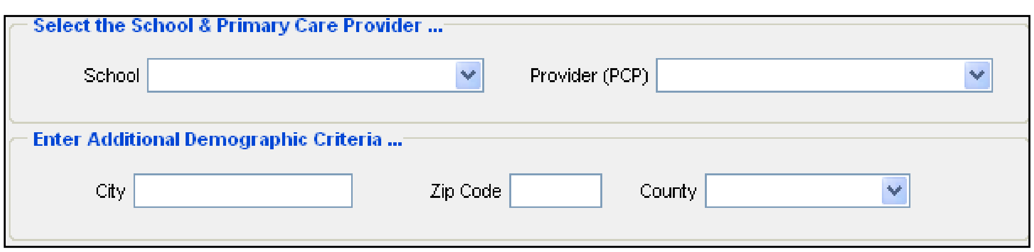
1. Click Reminder/Recall under Reports on the menu panel.
2. Patient Population: This section is available only to State, County and City Public Health organizations. Users associated with these organizations can select patients based on their specific organization or that are residing in a specific county or city by selecting one of the following options:
    - To generate a reminder for all patients associated with your organization select the top radio button.
    - To generate a reminder for all patients within your county, select the second radio button. By default, inactive patients and patients not allowing reminders will be included in this report.
        - You can click on the check boxes that appear on the right to exclude inactive patients and/or patients who have requested that reminders not be sent to them.
    - To generate a reminder for both patients associated with your organization or residing in your county or city, select the third radio button. By default, inactive patients and patients not allowing reminders will be included in this report.
        - You can check the boxes that appear on the right to exclude inactive patients and/or patients who have requested that reminders not be sent to them.

3. Tracking Schedule: IRIS only uses the tracking schedule recommended by the Advisory Committee on Immunizations Practices (ACIP). Therefore, selecting to use the tracking schedule associated with each patient or a uniform tracking schedule for all patients will be based on ACIP recommendations.



4. Vaccine Groups: in the vaccine groups section of the screen:
   - Indicate whether you wish to include all vaccine groups in the search criteria or if you wish to include only selected groups by clicking the appropriate radio button.
   - If you choose to include only selected vaccine groups, select these groups by double clicking a group or highlighting a chosen group and pressing ADD. Do this for each group desired.
   - By selecting specific vaccine groups, you will limit the search to only those patients who will be due/past-due for the selected immunizations. However, IRIS will provide a list of all immunizations for which the selected patients are due/past-due.

5. School/Primary Care Provider: Choosing a school or primary care provider allows you to narrow your search to only the patients assigned to a particular school or physician/clinic. If you do not wish to specify a school and/or provider, leave these fields blank. These fields can only be utilized if the organization created a list of schools and physicians to populate the drop down boxes on the patient demographic screen and has selected data from these fields in each of the patient's records.
   - To choose a school, select a school name from the drop down list provided. Note that these schools are maintained for each provider through the User Interface, using the 'manage schools' menu item.
   - To choose a primary care provider, select a physician or clinic name from the drop down list provided.

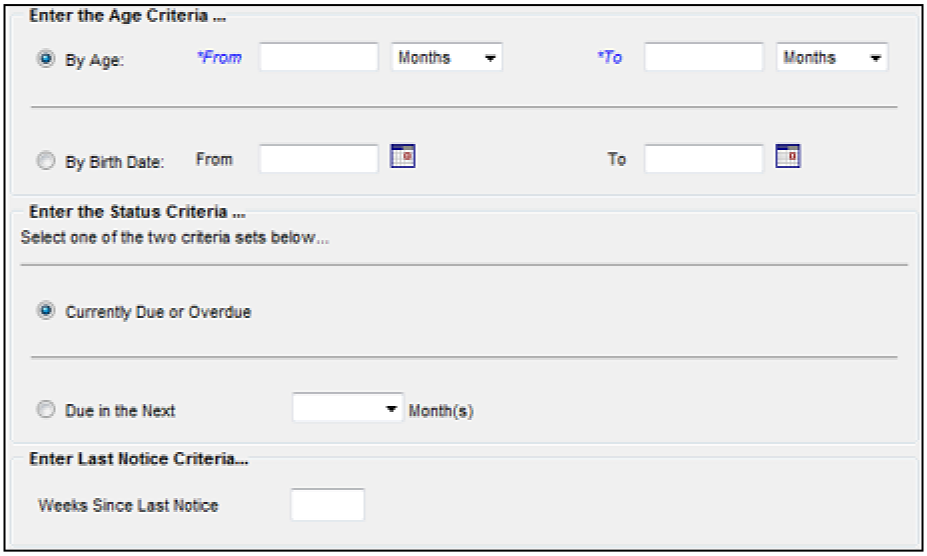


6. Additional Demographic Criteria: Entering a city and/or ZIP code will narrow your search to only the patients associated with the entered geographical area. However, by entering a county, you will expand your search to all patients who reside in the selected county. The county option is only available to county public health organizations. If you do not wish to specify a city, ZIP code, or county, leave these fields blank.
   - To enter a city, type the city name within the first field.
   - To enter a ZIP code, enter the five-digit number in the next field.
   - To enter a county, choose from the drop down list in the third field.

7. Age Criteria: Specification of whether to narrow your search By Age or By Birth Date is required.
   - By Age: Age will be calculated as of the current date. When this criteria is indicated both a From and To age will be required. Indicate with whole numbers the age in Months or Years. From and To age boundaries will be inclusive; accordingly patients falling exactly on the age boundaries will be included within the report.
   - By Birth Date: When this criteria is indicated, both a From and To Birth Date will be required. Indicate the dates in MM/DD/YYYY format or use the calendar icon to select the dates. By Birth Date boundaries are inclusive; accordingly patients whose date of birth falls exactly on either boundary will be included within the report.
8. Status Criteria: Specification of whether to narrow your search by Currently Due or Overdue, or by Due in the Next <#> Month(s) will be required.
   - Currently Due or Overdue: When this criteria is indicated, patients will be returned based on two criteria:
     1) Patient is at or has passed the recommended date for an immunization within the vaccine group and tracking schedule criteria indicated within the report criteria.

     AND

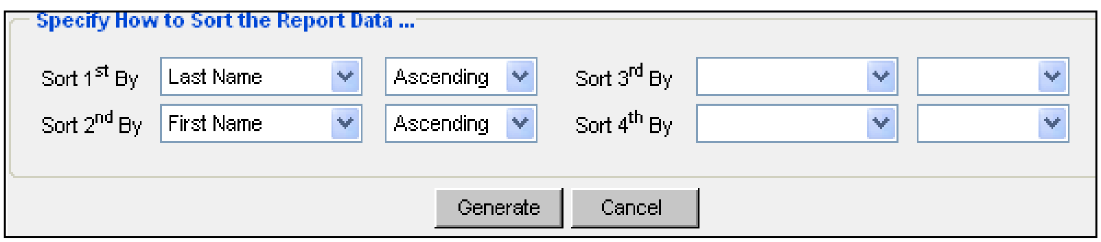
     2) Patient can still receive the immunization for which they're due and have that immunization considered valid by IRIS (i.e. they have not passed the maximum age requirement for that immunization).
   - Due in the Next <#> Month(s): When this criteria is indicated, patients will be returned based on whether they have a recommended date for an immunization within the vaccine group and tracking schedule criteria indicated within the report and occurring within the indicated number of months. The report has the option of searching 6 months forward using this criteria.



9. Weeks Since Last Notice: When a number is entered in this field, the report will include only those patients who have not received a reminder notice within the specified number of weeks prior to the current date.

Note: Patients are shared between organizations; therefore, another organization may have recently generated a notice for the patient. The last notice date, as referenced, can be found within the patient information screen, see Chapter 10 of this manual.

10. Sorting Criteria: This section allows you to specify how the data will be sorted. If a sort order is not specified, IRIS will sort the report results first by the patient's last name in ascending order (A to Z), then by the first name in ascending order.



- Sort 1st By: Choose a primary information field by selecting from the drop down list provided.
- Ascending/descending order: Choose how the primary field is sorted; choose either ascending (A to Z) or descending (Z to A) order from the drop down list.
- If desired, complete additional ordering sequences for the second through fourth sorts.

11. Generate the report: Press the ***Generate*** button. Depending upon the number of patients associated with your provider organization, it may take five minutes or more to generate the data for the various reports. While the data is being generated, the Request and Output status page indicates the percentage of completion. Periodically press ***Refresh*** to update the status.

Note: *Waiting for reminder requests*

Once you reach the Reminder Request Status screen, it is not necessary to stay at this screen while your report is being created. You may go anywhere in IRIS while the report is generating and may return to the status screen by clicking on the Check Reminder Status link under Reports on the menu panel. Likewise, you may close out of IRIS and return to the status screen by clicking on the Check Reminder Status link after logging in again.

Summary Screen

When the report is complete, you may click on the blue underlined date to go to the Reminder Request Process Summary screen. The Summary screen lists the number of patients involved in the search and the criteria that were used to define the search. From the Summary screen, you may create various reminder output options.

Reminder Request Process Summary

Step	Criteria Evaluated at this Step	Patients
1	Patients **associated** with *Kyle's Immunization Clinic*.	1232
2	Patients **immunized** by *Kyle's Immunization Clinic*.	1218
3	Patients that are **active** within *Kyle's Immunization Clinic* and **allow Reminder & Recall Contact**. Additional criteria includes: • **Birthdate range** is not specified; • **County** is not specified; • **School** is not specified; • **Provider** is not specified; • **Weeks Since Last Notice** is not specified.	1209
4	Patients that have a **Valid Address**. Additional criteria includes: • **City** is not specified • **Zip Code** is not specified.	840
5	Patients that meet the following criteria regarding vaccination status: • Patients that are **Recommended or Overdue** for one or more vaccinations **as of 11/04/2009**; • Use all **vaccine groups**; • Use **tracking schedule** associated with each patient. • **Exclude Overdue Reminders** is not specified.	832
	Total Number of Patients Eligible for Reminder	**832**

Last Notice Date Options

On the bottom of the Reminder Request Process Summary screen, you have the option of resetting the last notice date, which will affect future reminder/recall notices generated using this information. Your options on the last notice date table include:

Last Notice Date Options	
Set last notice date to today for all eligible patients when you select a report output.	☑
Revert last notice date to previous last notice date for all Patients ***eligible for this reminder****.*	Revert Eligible
Revert last notice date to previous last notice date for ***all patients immunized*** *by Kyle's Immunization Clinic.*	Revert All
Return to the previous screen.	Cancel

1. Set the last notice date to today's date. This is the default option and is indicated by a check mark.
2. Set the last notice date to reflect the previous last notice date for all patients eligible for this reminder by pressing ***Revert Eligible***. Use this option if you choose not to have the current report generation reflected in the Last Notice Date option on the Reminder Request screen for the recipients of this reminder.
3. Set the last notice date to reflect the previous last notice date for all patients immunized by your organization by pressing ***Revert All***. Use this option if you choose not to have the current report generation reflected in the Last Notice Date option on the Reminder Request screen for all patients immunized by your organization.
4. Press ***Cancel*** to return to the Reminder Request Status screen.

Reminder/Recall Output Options

The Reminder Request Output Options table, found on the Reminder Request Process Summary screen, allows you to choose how you would like to use the data from your query.

Reminder Letters

The letter output option allows you to generate a standard form letter for the parent/guardian for each patient returned on your query. The letter allows room at the top for your organization's letterhead. The body of the letter includes the patient's immunization history, recommended immunizations and due dates. There are up to two lines for free text and/or a telephone number. To generate Reminder Letters, follow these steps:

Output	Description	Additional Input	
Reminder Letter	Standard Reminder Letter.	Report Name	
		Free Text	
		Phone #	

1. Under the Additional Input column or the Letter section of the table, enter:
   - A report name in the appropriate field, if desired. If a report name is not indicated, the report will simply be named “Reminder Letter” on the Reminder Report Status screen.
   - Additional information in the Free Text field, if desired. You may include a maximum of 400 characters in this field. Any information entered in this text box will be presented as the closing for each of the letters generated in your report.
   - A telephone number in the appropriate field, if desired. If a telephone number is entered in this text box, then the number will be presented in the closing for each of the letters generated in your report. The phone number input will be placed within the letter as is, without formatting.
2. Click on **Reminder Letter**, which is underlined and in blue text.
3. Your report will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
   - You have the option of moving to other screens of IRIS or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, press Check Reminder Status under Reports on the menu panel.
   - If you choose to stay at the Reminder Request Status screen while your request is processing, press ***Refresh*** occasionally to check the status.
4. Once the status says ***Ready*** and the report name is underlined and appears in blue, your letters are ready to be viewed. Click on the report name to view or print the letters in Adobe Reader®.
5. To print the letters, press the printer icon on the Adobe® toolbar. Press ***OK*** in the Print dialog box.
6. To print additional output, press the ***BACK*** button on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top table) to return to the Reminder Request Process Summary screen.

Note: Patients included within the report without sufficient address information will not have a reminder letter generated for them.

Mailing Labels

The labels output option produces 30 labels per page on Avery Mailing Labels #5160. To generate mailing labels, follow these steps:

Mailing Labels	Avery Mailing Labels.	Report Name

1. Click on **Mailing Labels**, which is underlined and in blue text.
2. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.

- You have the option of moving to other screens of IRIS or using other functions of your computer while you are waiting for your labels to process. To return to check the progress of your request, press Check Reminder Status under Reports on the menu panel.
- If you choose to stay at the Reminder Request Status screen while your request is processing, press ***Refresh*** occasionally to check the status.

3. Once the report name is underlined and appears in blue text, your labels are ready. Click on the report name to view or print the labels in Adobe Reader®.
4. To print the labels, press the printer icon on the Adobe® toolbar. Press ***OK*** in the Print dialog box.
5. To print additional output, press the ***Back*** button on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top table) to return to the Reminder Request Process Summary screen.

Note: Patients included within the report without sufficient address information will not have a mailing label generated for them.

Patient Query Listings

The Patient Query Listing displays contact information for the patients included within the Reminder/Recall report, as well as an immunization history and recommendations based on their tracking schedule or the tracking schedule selected. This report lists every patient that was returned in the report query process, regardless of the address information on file. The report can be generated in either PDF or EXCEL format. To generate a Patient Query Listing, complete the following steps:

Patient Query Listing (PDF)	A list of patients based on the report criteria in PDF format.	Report Name	
Patient Query Listing (Excel)	A list of patients based on the report criteria in Excel format.	Report Name	

1. Click on **Patient Query Listing(PDF)** or **Patient Query Listing(Excel)** link (based on the format needed), which is underlined and in blue text.
2. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.

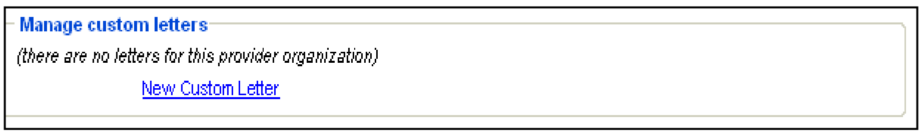
   - You have the option of moving to other screens of IRIS or using other functions of your computer while you are waiting for your report to process. To return to check the progress of your request, press Check Reminder Status under Reports on the menu panel.
   - If you choose to stay at the Reminder Request Status screen while your request is processing, press ***Refresh*** occasionally to check the status.

3. Once the report name is underlined and appears in blue text, your report is ready. Click on the report name to view or print the report in Adobe Reader® or Excel (based on the report link selected).
4. To print the report, press the printer icon on the Adobe® or Excel toolbar. Press ***OK*** in the Print dialog box.
5. To print additional output, press the ***Back*** button on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top table) to return to the Reminder Request Process Summary screen.

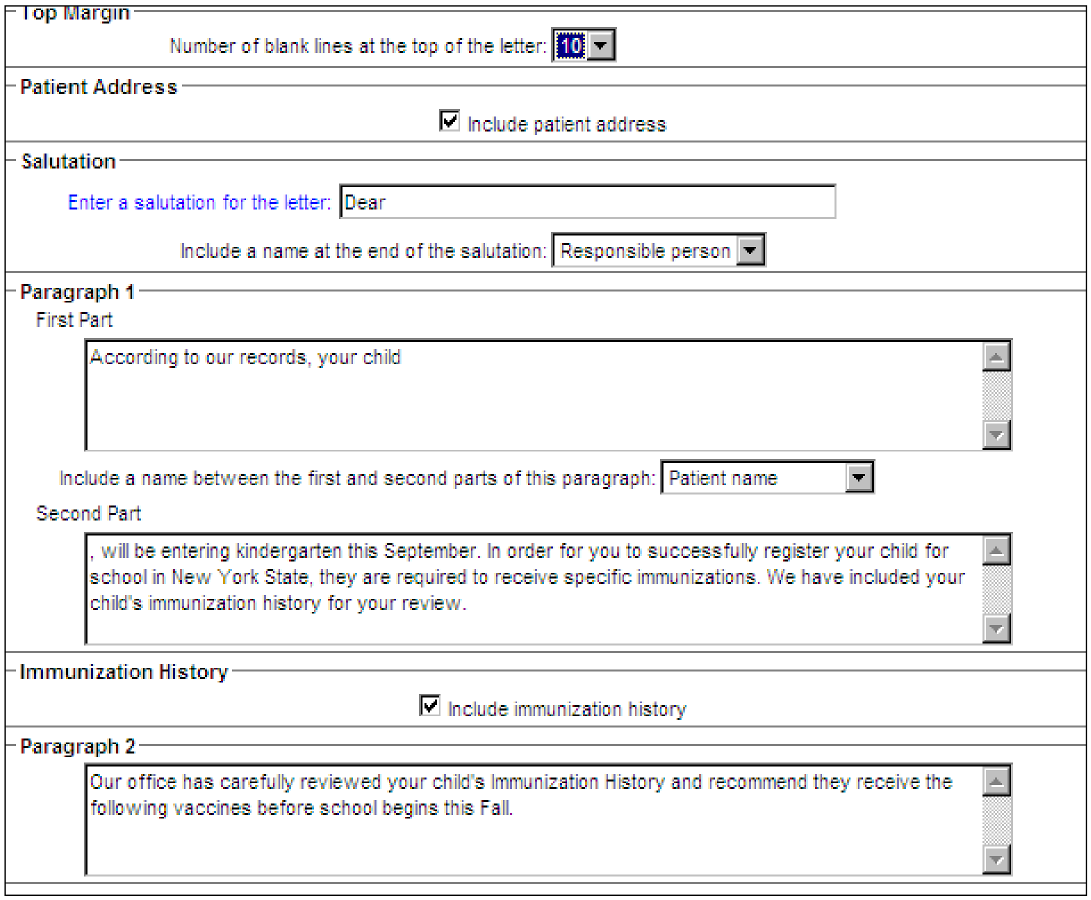
Creating Custom Letters

In addition to the standard letter, IRIS allows users to create and store up to three custom letters to be used for reminder/recall. To create a new custom letter, follow these steps.

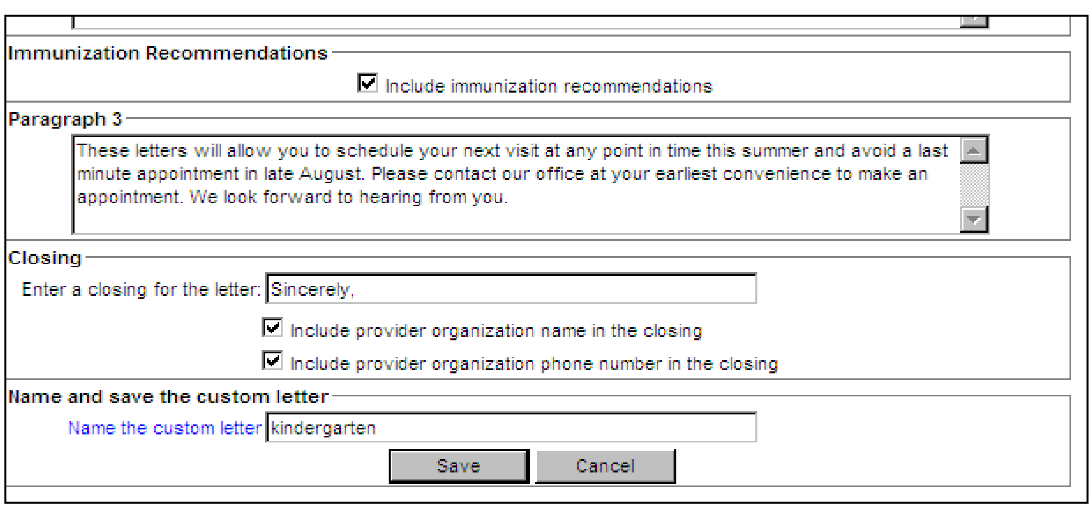
1. Click on **Manage Custom Letter** under Reports on the menu panel.



2. Click the underlined New Custom Letter link.
3. At the Create New Custom Letter screen, enter the following:
   - **Top Margin**: Choose the number of blank lines you would like at the top of the letter from the drop down list provided. These blank spaces will leave room for your office letterhead to show up on each letter generated from the report.
   - **Include Patient Address**: Check the box to include the patient's address at the top of the letter.
   - **Salutation**: Enter a greeting, then choose a name option from the drop down list provided.
     a. If **name** is chosen, the name of the patient will show up after the salutation.
     b. If **responsible person** is chosen, the letter will read <salutation> Parent/Guardian of <patient name>.
   - **Paragraph 1**: In the field marked "First Part", enter desired text. If you wish to include a name within the paragraph, enter text up to the mention of the name ending with a single space. Next, choose the name you would like to appear within the paragraph from the drop down list (either parent/guardian, patient name, or no name). In the field marked "Second Part", continue to enter the rest of the text. If you do not wish to include a name, you may enter all of the first paragraph text in the field marked "First Part" and select "no name" from the name drop down list.



- **Immunization History**: Check the box to include the patient's immunization history in the letter.
- **Paragraph 2**: Enter more text in this field, if desired.



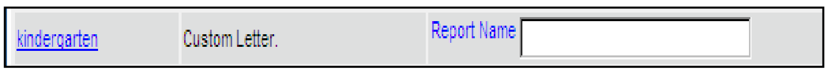
- **Immunization recommendations**: Check this box to include the immunizations recommended for the patient in the letter.
- **Paragraph 3**: Enter text in this field, if desired.

- **Closing**: Enter a closing word or statement in this field. If you wish to include your provider organization's name and/or telephone number after the closing, check the appropriate box(es).
- **Name and Save the Custom Letter**: Enter a name for the letter in the field provided. When the letter is complete, press ***Save***.

Generating Custom Letters

The custom letter output option allows you to generate a customized letter for each patient returned on your query. To create a new custom letter, refer to the "Creating Custom Letters" section of this chapter. To generate a custom letter from the Reminder Request Process Summary screen, follow these steps:

1. Click the link with the name of the custom letter. The letter will begin generating immediately.



2. Your report will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
   - You have the option of moving to other screens of IRIS or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, press Check Reminder Status under Reports on the menu panel.
   - If you choose to stay at the Reminder Request Status screen while your request is processing, press occasionally to check the status.

3. Once the report name is underlined and appears in blue, your letters are ready. Click on the report name to view or print the letters in Adobe Reader®.
4. To print the letters, press the printer icon on the Adobe® toolbar. Press ***OK*** in the Print dialog box.
5. To print additional output, press the ***Back*** button on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top table) to return to the Reminder Request Process Summary screen.

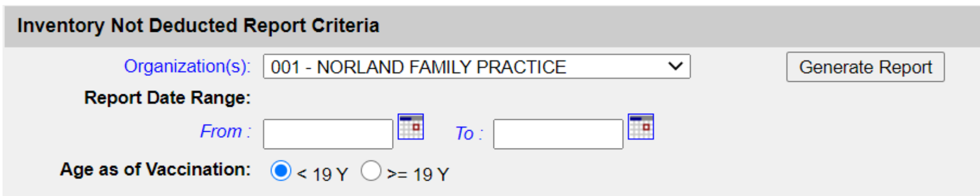
Note: Patients included within the report without sufficient address information will not have a mailing label generated for them.

Inventory Not Deducted Report

The Inventory Not Deducted Report provides a listing of the non-deducted immunizations for your organization which were added to IRIS through the data exchange process within the specified date range. The Immunizations listed in the report are the same as listed on the Inventory Not Deducted screen.

To generate an Inventory Not Deducted Report, follow these steps:

1. Click inv not deducted report under the Inventory section of the menu panel.



2. By default, your organizations name will populate in the Organization(s) drop down.
3. Enter a From date under the Report Date Range using the MM/DD/YYYY format or calendar icon.
4. Enter a To date under the Report Date Range using the MM/DD/YYYY format or calendar icon.
5. Select '>=19Y' radio button if you want only the COVID-19 adult vaccinations to be displayed.
6. Click **Generate Report**
7. The Inventory Not Deducted Report Status page is displayed. You may leave this page while the report is generated and return to it later by using the “check not deduct status” link in the left menu panel. To check on the report status without leaving the page, press the “Refresh” button.
8. When the report is ready, click on the report name, which is underlined and in blue text
9. The report will display in xls format
10. You can also use the check not deduct status to display reports already run for your organization.

Note: The listing includes immunizations sent from Data Exchange within the selected date range where the decrement from inventory setting was enabled for your organization at the time they were processed.

The following information is displayed for each immunization:

Field Name	Description
Transaction Date:	Displays the date the immunization was added to IRIS via data exchange.
Job Id:	Displays the Job Id of the Data Exchange job that added the immunization into IRIS.
Vaccination Date:	Displays the vaccination date of the immunization.
Patient Name:	Displays the patient’s first and last name.
Date of Birth:	Displays the patient’s date of birth.
Vaccine Name	Displays the vaccine name specified on the immunization.
Trade Name	Displays the trade name specified on the immunization.
Inventory Lot:	Displays the lot number specified on the immunization.
VFC Eligibility:	Displays the VFC eligibility specified on the immunization.

Inventory Not Deducted Report Example:

Inventory Not Deducted Report

Date Range: 12/01/2020 to 12/10/2020 Age as of Vaccination: >= 19Y (COVID-19 Vaccines only)

This list includes new doses administered, sent through electronic data exchange, that did not deduct from inventory.
Please contact vaccine management at (208) 334-6548 with questions.

Report ran on: 12/10/2020 10:34:55

Organization: Vasanth's Org Main

Transaction Date	Job Id	Vaccination Date	Patient Name	Date of Birth	Vaccine Name	Trade Name	Lot Number	VFC Eligibility
12/04/2020	N/A	12/04/2020	JIBBO, HAMEL	09/10/1965	COVID-19, mRNA,LNP-S,PF, 100 mcg/0.5mL	Moderna COVID-19 Vaccine	INVLOT	Ineligible
12/07/2020	402405	12/07/2020	ELASUS, CASEY	02/27/1959	COVID-19, mRNA,LNP-S,PF, 30 mcg/0.3mL	Pfizer COVID-19 Vaccine	INVLOT	Ineligible
12/04/2020	402391	11/27/2020	MELODEE, ADELYSIA	02/27/1959	COVID-19, mRNA,LNP-S,PF, 30 mcg/0.3mL	Pfizer COVID-19 Vaccine	INVLOT	Ineligible

Data Exchange

In this chapter:

Data Exchange IRIS

The data exchange feature of IRIS gives you the capability to exchange immunization data files. Only IRIS users with the role of “Provider Data Exchange”, ”Admin User (Provider)", “Admin User (Public Health)”, MCO Data Exchange" or “Pharmacist" will be able to perform data exchange. HMO/MCO users will need to follow the steps in the "HMO Data Exchange" section of this chapter.

Provider Organization Data Exchange

Prior to establishing data exchange, the IRIS staff must be contacted to arrange for testing either a Health Level 7 (HL7) or a Flat File that your organization will be sending. The IRIS Help Desk prefers to work with the vendor or technical contact to test the file format first. Once that testing is complete, the IRIS help Desk will run a test with each provider organization to ensure the provider organization itself is set up correctly within IRIS and is able to upload data into the system.

Creating a test file for Data Exchange

1. The most up to date version of the file specifications for both HL7 and Flat File can be found by selecting the Forms link within IRIS (top of the screen). If further assistance is needed, contact the IRIS Help Desk (208) 334-5995.
2. Send IRIS staff, iris@dhw.idaho.gov, a hypothetical sample file of at least 5-10 patient records. Include in this file a range of sample of immunizations per "patient". The IRIS Help Desk will check the file and run it in test mode.
    - All combination vaccines and single vaccines should ultimately be tested.
    - Provide at least 3 records where all patient information that you are allowing your clients to provide is entered (e.g., mother's maiden name responsible person, patient status, etc).
    - If you are only collecting the required fields, please let IRIS staff know that as well.
    - Review code tables carefully, paying careful attention to spelling and to codes that are only valid during specific time periods.
3. Send screen shots of your data entry screen so a comparison can be made between how the data is being entered into your system and how it looks in the test data file.
4. Once the file format has been tested and found to be correct, request that your provider organization contact the IRIS Help Desk (208) 334-5995 to set up data exchange. The Help Desk will walk the data exchange representative from your office through the steps for data upload and explain the response files that are created.

Setting up your organization for Data Exchange

In order to set up your organization for Data Exchange you must call the IRIS Help Desk and provide them with the following information:

- The name of your provider organization.
- The name of your vendor (EMR, Billing, Third Party)
- File format type:
  - Indicate Health Level 7 (HL7)
    - HL7 2.4 (CDC implementation Guide 2.3.1 June 2006)
    - HL7 2.5.1 release 1.3 or
    - HL7 2.5.1 release 1.5
  - Flat File with Insurance, or Custom Flat File.
- Enable HL7 Message Types: VXU, Query/Response or Both.
- Do you want IRIS to send Series and Recommendation information on outbound files?

Note: Files have a size limit of 150 MB combined of the patient, immunization and comment files that can be uploaded via the user interface. If files are larger than 150 MB, they will need to be split into smaller files for loading.

Uploading a file for Data Exchange

The IRIS Help Desk (208) 334-5995 will assist you with your first data exchange. This file will be sent into IRIS in **test** mode. They will walk you through the data exchange process and explain the response file to you. Once your first file has been accepted in IRIS, it will be reviewed by your organization and the IRIS Help Desk. If both parties agree that the Data Exchange was successful, then your organization will be able to continue sending data into the IRIS Application.

To perform a data exchange, follow these steps:

1. Click on **Exchange Data** under Data Exchange on the menu panel. Depending upon the type of file format and direction of data you will be using, one or more of the following fields will display:
   - *Job Name*: Fill in a name for the data exchange, if desired. If left blank, IRIS will use the current date for a job name.
   - *Deduct from Inventory:* This field will display only if your organization is setup to deduct doses from IRIS vaccine inventory. The 'Yes' option (default) will deduct doses from inventory for immunizations that meet the deduct criteria. The 'No' option allows you to submit a file of historical data without deducting doses from inventory.

- *HL7 File Name*: This field is required for users who are exchanging data using the HL7 file format. Press Browse to select the HL7 file you wish to upload.
- *Patient File Name*: This field is required if you have chosen "bidirectional" or "provider organization to IRIS" as a data direction, and your file format is Flat File, or your file format is a Custom Flat File. Press Browse; to select the appropriate Patient File Name.
- *Immunization File Name*: This field is required if you have chosen "bidirectional" or "provider organization to IRIS" as a data direction, and your file format is Flat File, or your file format is a Custom Flat File. Press Browse to select the appropriate Immunization File Name.
- *Comment File Name*: This optional field will appear if you exchange data via Flat File format and have chosen "bidirectional" or "provider organization to IRIS" as a data direction, or if you exchange data via Custom Flat File format. Press Browse to select the appropriate Immunization File Name.

2. Press the **Upload** or **Request Download** button on your screen, whichever is displayed.

Note: Do not close the browser, click on any other buttons, or navigate away from this page during the upload of the file.

3. The Exchange Data Result screen will display. This screen will list the files that were uploaded using "bidirectional" or "provider organization to IRIS" data directions and will confirm or provide the job name to the user.
4. Press **Check Status**.
5. The Exchange Data Status screen will display. This screen will contain the job name, user name, exchange data date, process start and end date, and status of the current job. By default, the status screen will show jobs submitted via the user interface (UI) today. You may filter the jobs listed by
   - ***Transport Type*:** Options are: UI 'User Interface' or Web Services.
   - ***Select Date Range*:** Select an option of Today, Past 7 days, Past 15 Days, Past 30 Days or All. Select the option that will return the fewest number of jobs to view results faster.
   - ***Date Range:*** Enter a From and To Date. This option is ideal if you know the date the job was submitted or are a large organization with many jobs that may need to view jobs submitted prior to today.
   - ***Hour Range:*** Enter a From and To Time. This option is ideal if you know the date and or time frame the job was submitted or are a large organization with many jobs that may need to filter the number of jobs returned.
6. Press **Refresh** periodically to check the status of the job, it will not automatically update.
7. When a job is completed, the job name will appear underlined and in blue. Under the status column, one of three messages may appear.

- ***Preprocessed:*** This message indicates the job has completed preprocessing. Some organizations may choose to use preprocess as a step in batch processing to check file lengths on a flat file, or as a high level data quality check of fields on HL7 or flat files. After reviewing your file either click Start Processing button to submit the file or enter a rejection reason and click the Reject button to set the file to Error status.

  ***Note*:** A job that goes to exception may split with stop with the split job in a status of preprocess. If a job goes to exception/splits, please contact the help desk for assistance.
- ***Complete*:** This message indicates the job has completed processing.
- ***Error:*** This message indicates the job could not be processed because of formatting errors.
- ***Exception*:** This message indicates that the job could not be processed because of an internal system error.

8. Click on the blue underlined job name.
9. If the job completed successfully, the Job Detail screen will display. This screen contains the following three sections:
   - Download Files for: <Job Name>: This section contains files available for you to download, including the original Inbound File submitted, Response Files and any "IRIS to provider organization" outbound and/or query response files. Click on the blue, underlined download name to download the file.
   - Download Log for: <Job Name>: This section contains information regarding activity of the download file(s), including file name, user name, date, and time of the download(s).
   - Summary Information for: <Job Name>: This section contains a summary of all the information pertinent to the exchanged data file received and processed.
10. If the job did not complete successfully, the Job Error screen will display. This screen will contain an explanation of why the exchange data could not be processed, contains the original uploaded file(s), and lists information regarding the activity of the downloaded file(s).

Data Collected via Data Exchange

Submit as much data as possible of the listed elements for completeness. At a minimum, fields in blue must be submitted for IRIS to process the file.

Patient Information
Record Identifier:
Patient Status:
First Name:
Middle Name:
Last Name:
Name Suffix:
Birth Date MMDDYYYY:
Death Date MMDDYYYY:
Mothers First Name:
Mothers Maiden Last Name:
Sex (Gender):

Race:
Ethnicity:
Contact Allowed:
Patient ID:
Responsible Party First Name:
Responsible Party Middle Name:
Responsible Party Last Name:
Responsible Party Relationship:
Street Address:
PO Box Route Line:
Other Address Line:
City:
State:
Zip:
County:
Phone:
Sending Organization (this is your IRIS organization ID): This field is REQUIRED if an organization other than the organization that owns the record(s) is transmitting the data.

Immunization Information
Record Identifier:
Vaccine Group*: **Either Vaccine group or CPT Code is required**
CPT Code*: **Either Vaccine Group or CPT Code is required**
CVX Code*: **Either Vaccine Group or CPT Code is required -** - HL7 FILE ONLY
Trade Name:
Vaccination Date MMDDYYYY:
Administration Route Code:
Body Site Code:
Reaction Code:
Manufacturer Code:
Immunization Information Source: *NOTE*: if this field is left blank, the immunization will be listed as historic or not owned by sending organization. To indicate that an immunization was administered by your provider office and to ensure that immunization is properly associated with your office, fill this field with “00”.
Lot Number: This field is REQUIRED if immunization will deduct from IRIS inventory.
Provider Name:
Administered By Name:
Site Name:
Sending Organization: (this is your IRIS organization ID): This field is REQUIRED if an organization other than the organization that owns the record(s) is transmitting the data
Financial Status (VFC Eligibility):
Vaccine Purchased With (Funding Type):
Insurer
Comment Information
Record Identifier:
Comment Code:
Applies to Date MMDDYYYY:

HMO Data Exchange

All HMO/MCOs will need to complete the same testing of their data file format as outlined above for provider organizations and EMRs. Prior to performing an HMO data exchange, your HMO will need to contact the IRIS Help Desk and arrange for your organization to be set up to perform data exchange. The specifications can be found below.

You will need to provide the following information regarding the exchange:

- *File format*: Indicate HL7 or Flat File.
- *Type of transmission*: Indicate whether the exchange will be a test or an actual production transfer.

To perform an HMO Data Exchange, follow these steps:

1. Click on Submit HMO Data or Submit HMO Query under the Data Exchange menu option. Depending upon the selection made and the type of file format you are set up to use, one or more of the following fields will display:
   - Job Name: Fill in a name for the data exchange, if desired. If left blank, IRIS will use the current date for a job name.
   - For Flat File Submissions:
     - Patient File Name: This field is required if your file format is Flat File. Press Browse to select the appropriate Patient File Name.
     - Immunization File Name: This optional field will appear if you exchange data via Flat File format. HMO/MCOs are not required to send immunization data.
     - Comment File Name: This is an optional file which will appear if you exchange data via Flat File format.
   - For HL7 File Submissions
     - File Name. This field is required for users who are exchanging data using the HL7 file format. Press Browse to select the HL7 file you wish to upload.
   - For HMO Query Files
     - This field is required for users who are running an HMO query. Press Browse to select the appropriate query file. For the format of the HMO query, please see the HMO Query Specification.

Note: A query may not be successfully run until the HMO/MCO has submitted patient data into IRIS. Only patients that are shown to be affiliated to an HMO/MCO will be returned to the HMO via a data query.

2. Press Upload.
3. The Exchange Data Result screen will display. This screen will list the files that were uploaded and will confirm or provide the job name to the user.
4. Press the Check Status button.

5. The Exchange Data Status screen will display. This screen will contain the job name, user name, exchange data date, process start and end date, and status of the current job. By default, the status screen will show jobs submitted via the user interface (UI) today. You may filter the jobs listed by
   - ***Transport Type*:** Options are: UI 'User Interface' or Web Services.
   - ***Select Date Range*:** Select an option of Today, Past 7 days, Past 15 Days, Past 30 Days or All. Select the option that will return the fewest number of jobs to view results faster.
   - ***Date Range:*** Enter a From and To Date. This option is ideal if you know the date the job was submitted or are a large organization with many jobs that may need to view jobs submitted prior to today.
   - ***Hour Range:*** Enter a From and To Time. This option is ideal if you know the date and or time frame the job was submitted or are a large organization with many jobs that may need to filter the number of jobs returned.
6. Press **Refresh** periodically to check the status of the job, it will not automatically update.
7. When a job is completed, the job name will appear underlined and in blue. Under the status column, one of three messages may appear.
   - ***Preprocessed:*** This message indicates the inbound job has completed preprocessing. Some organizations may choose to use preprocess as a step in batch processing to check file lengths on a flat file, or as a high level data quality check of fields on HL7 or flat files. After reviewing your file either click Start Processing button to submit the file or enter a rejection reason and click the Reject button to set the file to Error status.

     ***Note*:** A job that goes to exception may split with stop with the split job in a status of preprocess. If a job goes to exception/splits, please contact the help desk for assistance.
   - ***Complete*:** This message indicates the job has completed processing.
   - ***Error*:** This message indicates the job could not be processed because of formatting errors.
   - ***Exception*:** This message indicates that the job could not be processed because of an internal system error.

8. Click on the underlined job name.
9. If the job completed successfully, the Job Detail screen will display. For jobs created from the Submit HMO Data menu option, these sections will display:

   - Download Files for: <Job Name>: This section contains all output files available for you to download, including the Response Files and any "IRIS to provider organization" download files. Click on the blue, underlined download name to download the file.
   - Download Log for: <Job Name>: This section contains information regarding activity of the download file(s), including file name, user name, and date and time of the download(s).
   - Summary Information for: <Job Name>: This section contains all information pertinent to the exchanged data file received and processed.

For jobs created using the Submit HMO Query menu option, the following sections display:

- Download Files for: <Job Name>: Contains the Demographic File, Immunization File, and Exception File, all available for download by clicking on the underlined file name.
- Download Log for: <Job Name>: Contains information regarding activity of the download files.

10. If the job did not complete successfully, the Job Error screen will display. This screen contains an explanation of why the exchange data could not be processed contains the original uploaded file(s), and lists information regarding the activity of the downloaded file(s).

HMO Query Specifications

HMO Query Format

Column	Data type	Required	Default	Notes
Record Type	Char(1)	Y		'C' for Commercial
Record Identifier	Char(20)	Y		The Patient ID/Chart number used by this organization for the patient
First Name	Char(25)	Y		
Middle Name	Char(25)			
Last Name	Char(35)	Y		
Birth Date	Date(8)	Y		MMDDYYYY

Example:

Records need to be **blank** filled. In the following example, blanks are represented with the '*' character for illustrative purposes.

HMO Query

```
C12347890************JOHN*********************MICHAEL******************SMITH**************************
****01011999
```

Example Breakdown

- From this sample file we can see the HMO is querying on a Commercial Record by the use of 'C' in character 1.
- The patient's Chart Number for the HMO is 12347890 indicated in characters 2 – 21.
- The patient's name is John Michael Smith.
- The patient has a birth date of 01/01/1999.

The patients that are being queried MUST have a relationship to the HMO.

HMO Query Result File Formats

Demographic

Column	Field Length	Location	Notes
Patient ID/Chart Number	20	1 – 20	
First Name	25	21 – 45	
Middle Name	25	46 – 70	
Last Name	35	71-105	
Birth Date	8	106-113	MMDDYYYY

Immunization

Column	Field Length	Location	Notes
PatientID/Chart Number	20	1 – 20	
CPT	5	21 – 25	
Vaccine Group	16	26 – 41	
Administered Date	8	42 – 49	
Filler	1	50	Blank

Exception

Column	Field Length	Location	Notes
Patient ID/Chart Number	20	1 – 20	
Record Type	1	21	‘C’ for Commercial
Error Message		Begins in 22	

Provider Data Exchange Dashboard Report

The Provider Data Exchange Dashboard report gives user the ability to review and analyze the quality of the data submitted to IRIS for a specified time frame. This report includes a high-level summary on the Summary tab and detailed data in the Job Detail and Error Detail tabs.

Note: This report is only available to users with the ability to upload data exchanges files. The org must be submitting or have data submitted on its behalf in HL7 251 file format or above. Otherwise, the message, “Please contact the IRIS Helpdesk at iris@dhw.idaho or 208-334-5995 regarding the data exchange report for your organization.” will be displayed on the screen.

Data Exchange Dashboard Criteria:

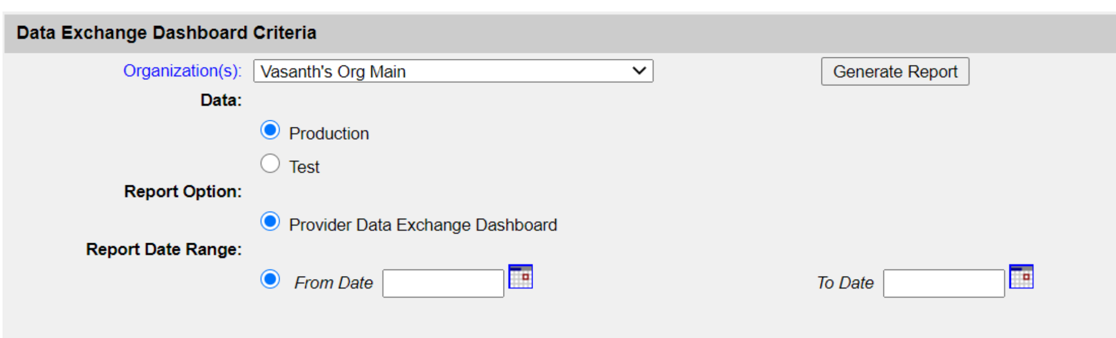
To generate the report, follow these steps:

1. Click on **Dashboard Report** under the Data Exchange section of the menu panel.
2. Select the factors to use to generate the report.
   a. The Organization(s) drop-down list will display: •
      - The org user is currently logged in under, and/or
      - The (sending) orgs previously/currently submitted data on behalf of the organization the user is currently logged in under

   Note: Please select the Organization sending/submitted the data to IRIS (e.g. the parent or vendor organization, which may not be the organization that owns the data or administered the immunization)

   b. Select the Data type to be used on the report:
      - Click on the Production radio button to generate a report with production data
      - Click on the Test radio button to generate a report with test data

   c. Report Option has "Provider Data Exchange Dashboard" report preselected
   d. Select the Report Data Range by entering the dates in the fields provided or by using the calendar icons to enter the dates.
      - There will not be any data available prior to December 2017
3. Click on Generate Report button. The DX Dashboard Report Status page will be displayed
   a. You may leave this page while the report is generating and return to it later by using the "check dashboard status" link in the left menu panel.
   b. To check on that report status without leaving the page, press the "Refresh" button. When the report is ready, you can click on the report name, which is underlined and in blue text



Data Exchange Dashboard Report Status:

4. Click on ***Refresh*** occasionally to update the status of the report. Once the underlined report name appears in blue, click it.
5. To open/view the report, select the Open option in the daughter window. The report will open as an Excel spreadsheet in xls format.
6. To save the report, select the Save or Save As options in a daughter window. Select the location to save the file, enter a file name and click on ***Save***. The report will be saved as an Excel spreadsheet in xls format.

Data Exchange Dashboard Report Status Refresh

Report Name	Org Name	User Name	Started	Completed	Status
Prov (P): 07/12/2020-08/11/2020	Vasanth's Org Main	Vasanth Shan	08/11/2020 08:47:25	08/11/2020 08:47:25	COMPLETE

Note: All the dashboard reports generated (by any users) for your organization will be displayed and retained for 30 days.

Understanding the Provider Data Exchange Error Dashboard report:

The following section explains the information in the dashboard report. The report only displays data related to your organization including the data sent by your organization or on behalf of your organization.

The summary tables will only be displayed when data is available. For example, if the org has not submitted any query files, the Summary of Data Exchange QBP Queries table will not be displayed.

The report has three tabs including the Summary tab, the Job Detail tab and the Error Detail tab.

Tab	Info	Description
Summary	Table: Summary of Data Exchange VXU Jobs	The number of dx VXU jobs submitted for your org and associated breakdown. This info is the sum of the data in the DX Job Summary screen for your dx jobs submitted in the specified time frame
Summary	Graph: Patient Record Status	The patient data for the dx VXU jobs submitted for your org in the specified time frame. Will only display up to 15 orgs in chronological order

Summary	Graph: Immunization Record Status	The immunization data for the dx VXU jobs submitted for your org in the specified time frame. Will only display up to 15 orgs in chronological order
Summary	Table: Summary of Data Exchange VXU Error Types	The sum of all error types (i.e. I-Informational, W-Warning and E-Error) associated with your dx VXU jobs submitted in the specified time frame
Summary	Table: Summary of Data Exchange QBP Queries	The sum of all query results (i.e. Single Match = OK, Multiple Match = TM and No Match/Error = NF, AE or AR) associated with your dx QBP query jobs submitted in the specified time frame
Summary	Table: Timeliness of New Administered Immunizations	The timeliness of all new owned/administered imms submitted to IRIS in the specified time frame. This is the length of time between administration of imms and when they were reported to IRIS
Summary	Graph: Summary of Errors per Segment	The number of errors per segment for the dx VXU jobs submitted for your org in the specified time frame
Job Detail	Table: Job Detail	The detailed list of all your dx VXU jobs submitted in the specified time frame. The same info is the DX Job Summary screen for each dx job
Error Detail	Table: Error Detail	The detailed list of errors associated with your dx VXU jobs submitted in the specified time frame. The same info is found in the individual response files for each dx job

School and Childcare

In this chapter:

School/Childcare Access

School and childcare users can search for a student's immunization records in IRIS and generate reports about specified student populations. School and childcare users can also enter and edit student data in IRIS.

Schools and childcares have two types of user roles:

- Standard Users
- Enhanced Users

Standard users have the ability to view immunizations and student comments. Standard users can also add immunization exemptions (referred to as "waivers" in IRIS). Standard users do not have the ability to add or edit immunizations. Instead, standard users may fax immunization records to the Idaho Immunization Program at (208) 334-4914 for immunization records to be entered into IRIS.

Enhanced users have the ability to add and edit immunization records, add and delete student comments, and add and delete waivers.

Manage School Profile

The **Manage School Profile** screen allows school's to update contact information and document grades offered for annual reporting.

There are two main sections used in the **Manage School Profile** screen.

- School District
- Grades Offered
- School Contacts

School District

The school's assigned school district and superintendent information is displayed as read only format. The School District information is managed by the Idaho Immunization Program.

School Name – Organization Name of the school in IRIS.

School District – Name of the Idaho School District.

School District Code – Idaho School District's unique code.

School Type – School Type for the school. Options are Charter, Private or Public.

Superintendent

- **First Name** – School District Superintendent First Name.
- **Last Name** – School District Superintendent Last Name.
- **Suffix** – School District Superintendent Last Name Suffix.
- **Phone** – School District Superintendent's phone number.
- **Email** – School District Superintendent's email address.

Grades Offered

The school's grades offered. At least one checkbox is required to be selected.

Grades Offered* – Select the checkboxes of the Idaho School Annual reporting grades offered by the school. Options are Grade K 'Kindergarten,' Grade 1, Grade 7, Grade 12. More than one checkbox can be selected. If none of the grades listed are offered, then NA should be selected.

School Contacts

The school's contact information is displayed as read only format.

Principal

- **First Name*** – School Principal's First Name. This field is required.
- **Last Name*** – School Principal's Last Name. This field is required.
- **Phone** – School Principal's phone number. Phone number is optional. If phone number is entered must include area code, prefix and line numbers. Extension is optional.
- **Email*** – School Principal's email address. This field is required. Must include @ symbol and period after @.

Main Contact

- **First Name*** – School Main Contact's First Name. This field is required.
- **Last Name*** – School Main Contact's Last Name. This field is required.
- **Phone** – School Main Contact's phone number. Phone number is optional. If phone number is entered must include area code, prefix and line numbers. Extension is optional.
- **Email*** – School Main Contact's email address. This field is required. Must include @ symbol and period after @.

Additional Contact

- **Add Additional Contact –** Additional contact is optional. If checkbox is selected the Additional Contact fields will be editable.
- **First Name** – School Additional Contact's First Name. This field is required if Add Additional Contact checkbox is selected.
- **Last Name** – School Additional Contact's Last Name. This field is required if Add Additional Contact checkbox is selected.
- **Phone** – School Additional Contact's phone number. Phone number is optional. If phone number is entered must include area code, prefix and line numbers. Extension is optional.
- **Email** – School Additional Contact's email address. This field is required if Add Additional Contact checkbox is selected. Must include @ symbol and period after @.

Last Updated Date: Date and time school profile was last updated.

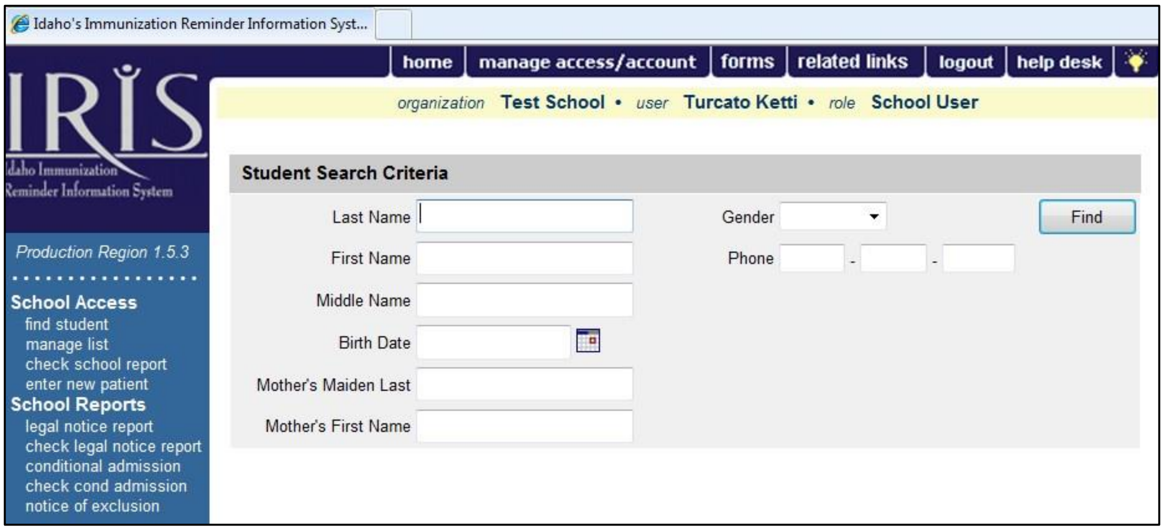
Last Updated By: User that last updated school profile.

Finding Student Screen

The **Find Student** screen is used to search and locate any school student existing in the IRIS application using predetermined sets of search criteria.

There are two main sections used in the **Find Student** screen.

- Enter Search Criteria for a Student
- Search Results



Search Criteria

Listed below are the main items used to search for a student in IRIS.

- Student Name
- Mother's Name
- Birth Date
- Gender
- Phone Number

Student Name Search

In order to locate a student in IRIS using his or her name, a certain portion of each of the student's Last Name and First Name must be entered into the respective information fields as described below.

Last Name - At a minimum, the first three characters of the student's last name must be entered.

A search can be executed using less than three characters for the Last Name. In this case, the system will search the database for a student whose Last Name *exactly* matches the search.

First Name - At a minimum, the first two characters of the student's first name must be entered.

Middle Name - There is no minimum character entry for the middle name field. The middle name is only functional when used in conjunction with the student's last or first name or both. If the patient does not have a middle initial recorded in IRIS, using it in your search will not produce a match.

Mother's Name Search

In order to locate a student in IRIS using his or her Mother's Maiden Name, a certain portion of each of the Mother's Maiden Last Name and Mother's First Name must be entered into the respective information fields as described below. The Mother's Name Search can be used independently or in conjunction with the Student Name Search. Not all students will have his or her mother's name on file. As a result, this search criteria should not be used unless a student cannot be found using first and last name or date of birth and gender.

Mother's Maiden Last - At a minimum, the first three characters of the Mother's Maiden Last name must be entered.

Mother's First Name - At a minimum, the first two characters of the Mother's First Name must be entered.

Birth Date Search

In order to locate a student in IRIS using his or her Birth Date, the criteria must be entered as described below.

Birth Date - Can be a valid date between 01/01/1880 and the current date and it must be entered in the following format MM/DD/YYYY.

The search will return all students whose corresponding birth dates exactly match the dates entered. The Birth Date Search can be used independently but is recommended that it only be used in conjunction with at least one other set of search criteria, such as Last Name. Typically there may be hundreds of students born on that particular day which will cause IRIS to hit the threshold limit.

Gender Search

The Gender Search can only be used in helping to locate a student in IRIS when used in conjunction with one or more other set(s) of search criteria.

Gender - Select one of the three options, Male, Female, or Unknown.

Phone Number Search

In order to locate a student in IRIS using his or her Phone Number, the criteria must be entered as described below.

Phone Number - A valid seven-digit Phone Number must be entered.

The search will only return students whose corresponding Phone Number *exactly* matches the Phone Number entered. An Area Code can be entered in the first information field after Phone as an additional means to narrow the search but is never required. The Phone Number Search can be used independently or in conjunction with other search criteria.

Once you have entered all your criteria for the search, click on the button to execute the search. Results are described below.

Search Results

Exact Student Match - An Exact Student Match means IRIS returned only one student. When this occurs, the **Student Immunization History** screen is displayed containing all of the relevant information regarding the student. An Exact Student Match will usually occur when the search criteria entered contains information inherently specific to a particular student.

List of Possible Matches

A List of Possible Matches means the search returned more than one and less than or equal to 75 possible student matches. All possible student matches returned are then displayed in a table. The student result table is sorted alphabetically by Last Name. Middle name, birth date and gender are also included in the table for each student. Using the information displayed for each of the students in the table, the student can be selected by clicking on the Last Name. The **Student Immunization History** screen is then displayed containing all relevant information regarding the student selected.

Threshold Limit

When executing a search in the database, IRIS may find multiple potential matches from the search criteria entered. If the number of students exceeds 75 available matches, then no students will be listed for further selection. Instead, the following message will display:

"XX students were found. Please refine your search criteria to limit your student list."
(Where XX is the total number of students found in the search.)

This threshold limit occurs to restrict the extremely long lists of possible students.

In the event a threshold limit is encountered while executing a student search, the scope of the search must be narrowed. Revisit the search criterion that was previously used and add additional information available for the student. Be sure to observe the search criteria restrictions listed above in the Student Search Criteria section.

Student Immunization History Screen

The **Student Immunization History** screen displays a student's immunization history and provides immunization recommendations based on the ACIP schedule. From this screen, you are also able to select and add the student to a specific student list. This will allow you to run reports for that student.

There are five main sections used in the **Student Immunization History** screen.

- Student Information
- Student Current Status
- Student Immunization History
- Vaccines Required for School/Childcare Entry
- Vaccines Required for 7^{th} Grade Entry
- Vaccines Required for 12^{th} Grade Entry

Note: For Schools, all students are required to meet the Vaccines Required for School Entry. The additional Vaccines Required for Grade Entry will be displayed for students starting in Kindergarten.

1. Student Immunization History screen shot for Standard Users

Patient Information IRIS ID: 178539

Patient Name (First - MI - Last)	DOB	Gender	Mother's Maiden	Tracking Schedule	Patient ID
WILEY CAILYN	08/30/2015	F		Pre-School	

Address: ID STREET, POCATELLO, ID 83209 (555) 555-5555

Comments:

Current Status: Adequately Immunized

Reports

Please Pick a Report List | Add to Report

History

Edit Patient | Reports | Print | Print Confidential

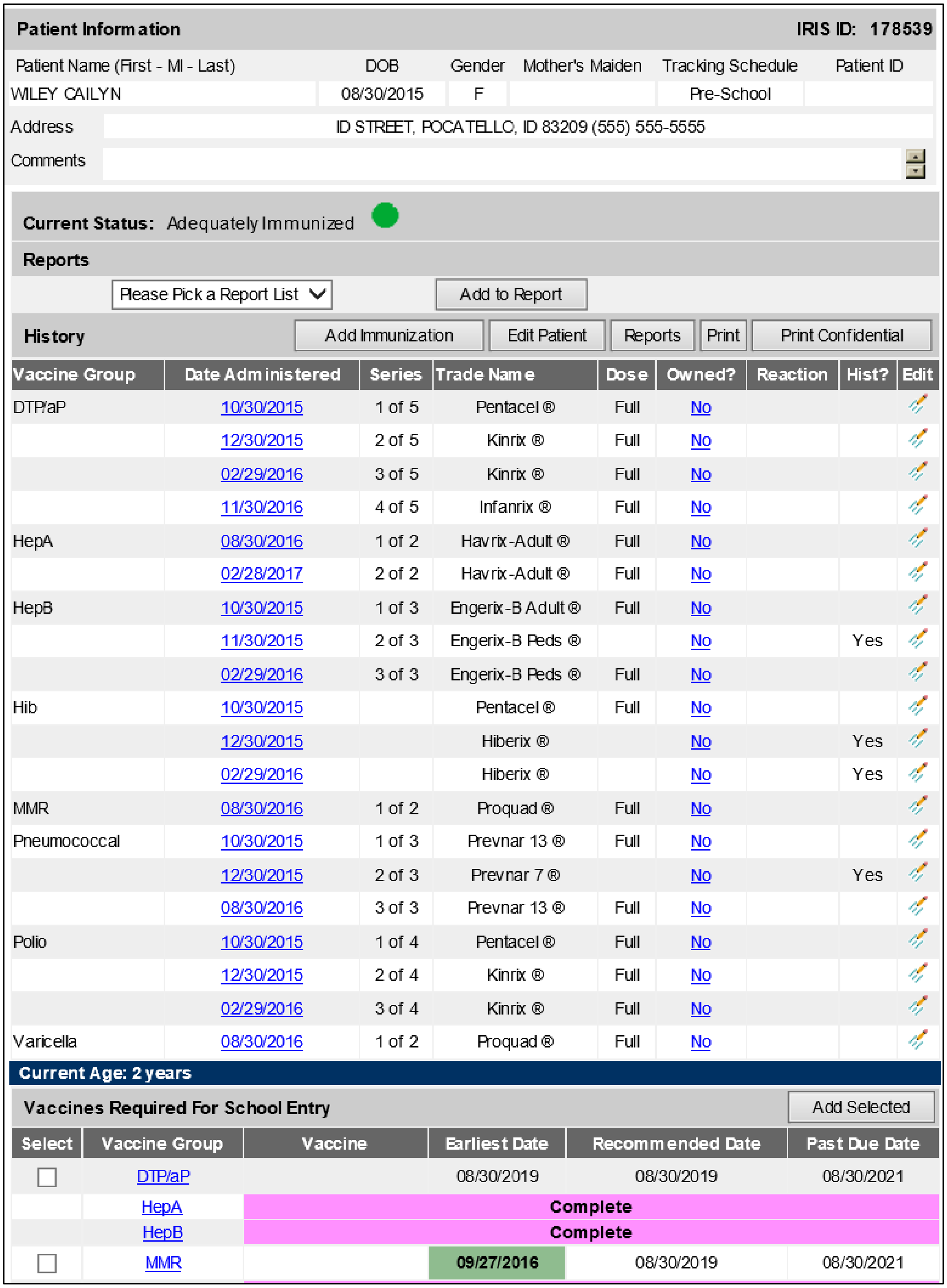
Vaccine Group	Date Administered	Series	Trade Name	Dose	Owned?	Reaction	Hist?
DTP/aP	10/30/2015	1 of 5	Pentacel ®	Full	No		
	12/30/2015	2 of 5	Kinrix ®	Full	No		
	02/29/2016	3 of 5	Kinrix ®	Full	No		
	11/30/2016	4 of 5	Infanrix ®	Full	No		
HepA	08/30/2016	1 of 2	Havrix-Adult ®	Full	No		
	02/28/2017	2 of 2	Havrix-Adult ®	Full	No		
HepB	10/30/2015	1 of 3	Engerix-B Adult ®	Full	No		
	11/30/2015	2 of 3	Engerix-B Peds ®		No		Yes
	02/29/2016	3 of 3	Engerix-B Peds ®	Full	No		
Hib	10/30/2015		Pentacel ®	Full	No		
	12/30/2015		Hiberix ®		No		Yes
	02/29/2016		Hiberix ®		No		Yes
MMR	08/30/2016	1 of 2	Proquad ®	Full	No		
Pneumococcal	10/30/2015	1 of 3	Prevnar 13 ®	Full	No		
	12/30/2015	2 of 3	Prevnar 7 ®		No		Yes
	08/30/2016	3 of 3	Prevnar 13 ®	Full	No		
Polio	10/30/2015	1 of 4	Pentacel ®	Full	No		
	12/30/2015	2 of 4	Kinrix ®	Full	No		
	02/29/2016	3 of 4	Kinrix ®	Full	No		
Varicella	08/30/2016	1 of 2	Proquad ®	Full	No		

Current Age: 2 years

Vaccines Required For School Entry

Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
DTP/aP		08/30/2019	08/30/2019	08/30/2021
HepA	**Complete**			
HepB	**Complete**			
MMR		09/27/2016	08/30/2019	08/30/2021

2. Student Immunization History screen shot for Enhanced Users



Patient Information IRIS ID: 178539

Patient Name (First - MI - Last)	DOB	Gender	Mother's Maiden	Tracking Schedule	Patient ID
WILEY CAILYN	08/30/2015	F		Pre-School	

Address: ID STREET, POCATELLO, ID 83209 (555) 555-5555

Comments

Current Status: Adequately Immunized

Reports

Please Pick a Report List | Add to Report

History | Add Immunization | Edit Patient | Reports | Print | Print Confidential

Vaccine Group	Date Administered	Series	Trade Name	Dose	Owned?	Reaction	Hist?	Edit
DTP/aP	10/30/2015	1 of 5	Pentacel ®	Full	No			
	12/30/2015	2 of 5	Kinrix ®	Full	No			
	02/29/2016	3 of 5	Kinrix ®	Full	No			
	11/30/2016	4 of 5	Infanrix ®	Full	No			
HepA	08/30/2016	1 of 2	Havrix-Adult ®	Full	No			
	02/28/2017	2 of 2	Havrix-Adult ®	Full	No			
HepB	10/30/2015	1 of 3	Engerix-B Adult ®	Full	No			
	11/30/2015	2 of 3	Engerix-B Peds ®		No		Yes	
	02/29/2016	3 of 3	Engerix-B Peds ®	Full	No			
Hib	10/30/2015		Pentacel ®	Full	No			
	12/30/2015		Hiberix ®		No		Yes	
	02/29/2016		Hiberix ®		No		Yes	
MMR	08/30/2016	1 of 2	Proquad ®	Full	No			
Pneumococcal	10/30/2015	1 of 3	Prevnar 13 ®	Full	No			
	12/30/2015	2 of 3	Prevnar 7 ®		No		Yes	
	08/30/2016	3 of 3	Prevnar 13 ®	Full	No			
Polio	10/30/2015	1 of 4	Pentacel ®	Full	No			
	12/30/2015	2 of 4	Kinrix ®	Full	No			
	02/29/2016	3 of 4	Kinrix ®	Full	No			
Varicella	08/30/2016	1 of 2	Proquad ®	Full	No			

Current Age: 2 years

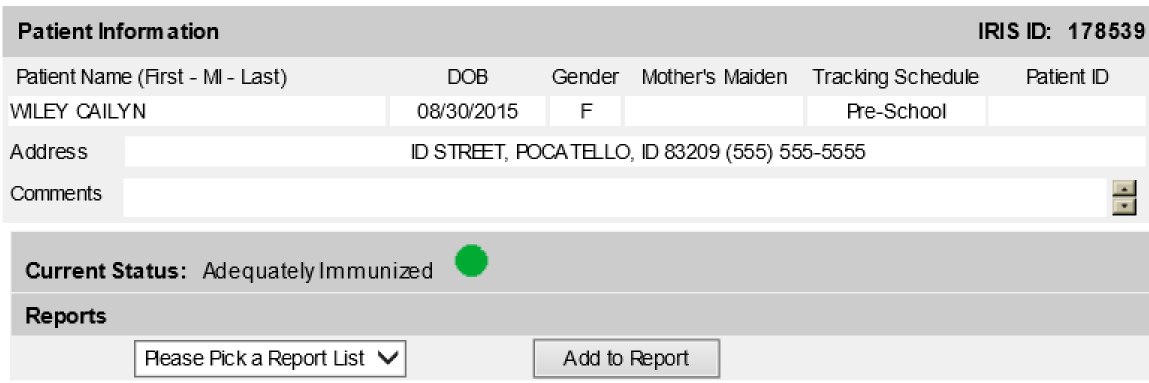
Vaccines Required For School Entry | Add Selected

Select	Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
☐	DTP/aP		08/30/2019	08/30/2019	08/30/2021
	HepA	**Complete**			
	HepB	**Complete**			
☐	MMR		**09/27/2016**	08/30/2019	08/30/2021

Student Information

The **Student Immunization History** screen displays a student information header at the top of the page. This header includes student name, selected tracking schedule, as well as other student-distinct information.

The information contained in the header (ex., name , date of birth and gender) can be used to confirm that you have located the correct student, especially if you have made an exact match and were directed to the **Student Immunization History** screen following a student search.



Current Status

In current status, students will be classified in one of five mutually exclusive categories:

- **Adequately Immunized**
  - A child in this category has all required vaccines. No reports will be generated for a child with adequately immunized status.
- **Conditionally Admitted**
  - A conditionally admitted child has received at least one dose of each required vaccine and is currently on schedule for subsequent immunizations.
  - The student will be included in the School or Childcare Conditional Admission report and the expiration date will default to the current date + 14 days.
- **Exempt**
  - An exempt child will have a medical or religious/other waiver on file at the specific school or childcare facility documenting exemption.

- **Incomplete**
  - An incomplete child has received fewer than the required number of doses of a required immunization and does not have remaining vaccinations scheduled. The student will be included in the school and childcare Notice of Required Documentation Needed report and the deadline will default to the current date + 14 days.
- **No Record**
  - A child with no record has no immunization record on file at the school or childcare. The student will be included in the school and childcare Notice of Required Documentation Needed report and the deadline will default to the current date + 14 days.

The validation message "This patient has missing and/or incomplete address information on file. Please update the patient address before entering immunizations." is displayed after 'Current Status' section when the Patient's country is United State or one of the US Territories and Patient's address does not have a Zip.

Adding Students to Report List

To add a student to a list, you must have first created specific student lists in the Manage Lists section of the application.

- Click on the drop down box and select your list from the available options.
- Then click the "Add this student to a Report List" hyperlink.
- Once a student has been added to a list, the student cannot be added to the same list again until removed from that list. The student can however be added to more than one list.

Student Immunization History

The **Student Immunization History** table lists all vaccinations the selected student has received to date. Immunizations listed in the table are ordered alphabetically first, then by 'Date Administered'. The table columns are defined as follows:

Vaccine Group:	This column lists the vaccine group name for each immunization received.
Trade Name:	This column gives the actual day the student was given the vaccine.

Series: Validates vaccine administration per the ACIP schedule and denotes the sequence number within the immunization series.

Trade Name: This column displays the trade name of the vaccination received.

Dose: This column indicates whether full, half or multiple doses were administered to the student.

Owned?:

If the value in the owned column is blank, the immunization data is owned by your organization. This would be a result of either manual data entry or having sent it via data exchange. This is only an indication of the organization submitting the data; it has nothing to do with the organization that administered the shot to the child.

If the value in the owned column is "no," the immunization data are not owned by your organization. This indicates that your organization did not enter the shot information into IRIS. Click on "no" to find out who owns the shot information.

Reaction: If this column indicates "Yes" and appears in red, it means a reaction to a vaccine was recorded. To view the student's reaction, click on the "Yes" link in the Reaction column.

Hist?: If this column indicates "Yes," this record is historical, meaning the immunization was administered by a provider at another organization, not the organization that owns the data. Historical immunizations will be editable by all organizations. If this column is blank, this indicates the immunization was administered by the organization that owns the data (i.e. entered the data into IRIS) and only this organization will be able to edit this record.

Edit: When you click on the notepad icon in this column, you will be able to edit some fields for the recorded immunization using the edit immunization screen, as long as the immunization is owned by your organization or is historical. Refer to the editing immunizations chapter in this manual.

Note: The edit field is not available for standard users. Standard users can only view immunization history and cannot edit or add immunizations.

Note: The student's age shows in a solid blue field between the student immunization history and before the recommendations.

Recommended Vaccinations

The recommended vaccinations and corresponding dates for the selected student reside in a table titled '**Vaccines Required for School Entry**' or **Vaccines Required for Childcare**.' The vaccine group list appearing in this table represents all vaccinations included in the tracking schedule assigned to this student. The table columns are defined as follows:

Select: Vaccines that are equal to or past their recommended date are automatically selected in the vaccines recommended section. You may also manually check other vaccines for inclusion in the vaccines recommended section. When the 'add selected' button is pressed, the check marked selections will display on the next screen.

Note: This field is not available for standard users. Standard users can only view immunization history and cannot edit or add immunizations.

Vaccine Group: This column displays the vaccine group name.

Vaccine: This column displays a vaccine name if a specific vaccine is recommended. The IRIS System Manager can choose to hide or display vaccine recommendations in a schedule

Earliest Date: This column displays dates which note the earliest date the student could receive the corresponding immunization.

Recommended Date: This column displays dates which note the date that the student is recommended to receive the corresponding immunization.

Past Due Date: This column displays dates which note the date that the student is past due for the corresponding immunization.

The dates found in the **Vaccines Recommended by Selected Tracking Schedule** table can be highlighted with color for emphasis. The colors applied to the dates within the columns are defined as follows:

Green will highlight dates in the Earliest Date, Recommended Date or Past Due Date column. Green shading indicates that today's date is equal to or past the highlighted date and is before the next date milestone. Therefore the immunization is recommended to be administered now.

Pink: A row shaded pink indicates a reason the vaccine is not recommended.

Maximum Age Exceeded: Reflects whether a student has exceeded the maximum age to receive a specific vaccine. For instance, if a student has already reached the age of 5 and hasn't completed the Pneumococcal series, then the recommendation for Pneumococcal at the bottom of the student immunization history will show "Maximum Age Exceeded".

Maximum Doses Met or Exceeded for Vaccine Group: Indicates the maximum number of doses that can be administered for the specified vaccine series.

Complete: Indicates that an immunization series has been completed according to the ACIP schedule.

Contraindicated: Indicates that the patient comments include a contraindication to vaccine(s) within this vaccine group. A medical waiver form should be requested.

Immunity Recorded for Vaccine Group: Indicates that the patient comments include evidence of immunity or history of disease.

Vaccines Required for 7th Grade Entry

The recommended vaccinations and corresponding dates for the selected student reside in a table entitled **Vaccines Required for 7th Grade Entry**. Students entering the 7th grade must have completed the vaccines required for School Entry and the Pertussis (Tdap) series. In addition the student must have received at least a valid dose of MeningACWY vaccine at age 10 years or older.

Vaccines Required for 12th Grade Entry

The recommended vaccinations and corresponding dates for the selected student reside in a table entitled **Vaccines Required for 12th Grade Entry**. Students entering the 12th grade must have completed the vaccines required for School Entry and the Pertussis (Tdap) and MeningACWY series.

Patient Information					IRIS ID: 1256801
Patient Name (First - MI - Last)	DOB	Gender	Mother's Maiden	Tracking Schedule	Patient ID
SEVENTH SCHOOL	07/01/2006	U		DOB>09/01/2005	
Address	1234 MIN ST, BOISE, ID 83717				
Comments					

Current Status: Incomplete

Reports

Please Pick a Report List | Add to Report

History | Edit Patient | Reports | Print | Print Confidential

Vaccine Group	Date Administered	Series	Trade Name	Dose	Owned?	Reaction	Hist?
DTP/aP	09/01/2007	1 of 5	Pentacel ®				Yes
	12/01/2007	2 of 5	Pentacel ®				Yes
	03/01/2008	3 of 5	Pentacel ®				Yes
	01/01/2009	4 of 5	Pentacel ®				Yes
	08/01/2011	5 of 5	Kinrix ®				Yes
HepA	01/01/2009	1 of 2					Yes
	08/01/2011	2 of 2					Yes
HepB	09/01/2007	1 of 3					Yes
	12/01/2007	2 of 3					Yes
	01/01/2009	3 of 3					Yes
Hib	09/01/2007		Pentacel ®				Yes
	12/01/2007		Pentacel ®				Yes
	03/01/2008		Pentacel ®				Yes
	01/01/2009		Pentacel ®				Yes
MMR	01/01/2009	1 of 2	Proquad ®				Yes
	08/01/2011	2 of 2	Proquad ®				Yes
Polio	09/01/2007	1 of 5	Pentacel ®				Yes
	12/01/2007	2 of 5	Pentacel ®				Yes
	03/01/2008	3 of 5	Pentacel ®				Yes
	01/01/2009	4 of 5	Pentacel ®				Yes
	08/01/2011	5 of 5	Kinrix ®				Yes
Varicella	01/01/2009	1 of 2	Proquad ®				Yes
	08/01/2011	2 of 2	Proquad ®				Yes

Current Age: 13 years, 11 months, 16 days

Vaccines Required For School Entry

Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
DTP/aP	Complete			
HepA	Complete			
HepB	Complete			
MMR	Complete			
Pertussis (Tdap)	Complete			
Polio	Complete			
Td	Tdap	07/01/2016	07/01/2017	07/01/2019
Varicella	Complete			

Vaccines Required for 7th Grade Entry

Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
Pertussis (Tdap)	Tdap	07/01/2016	07/01/2017	08/16/2019
MeningACWY		07/01/2016	07/01/2017	08/16/2019

Vaccines Required for 12th Grade Entry

Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
MeningACWY		07/01/2022	07/01/2022	08/16/2024

The columns in the Vaccines Required for Grade Entry table are defined as follows:

Vaccine Group: This column gives the vaccine group name, Tdap and MeningACWY will be required for 7th grade and above.

Vaccine: This column displays a vaccine name if a specific vaccine is recommended. The IRIS System Manager can choose to hide or display vaccine recommendations in a schedule.

Earliest Date: This column displays the earliest date the student could receive the corresponding immunization to complete the Grade level requirement.

7th Grade Requirements: A dose of Tdap and a dose of MeningACWY must be given on or after the student's 10th birthday complete the 7th grade requirement.

A dose of MeningACWY must be given on or after the student's 16th birthday complete the 12th grade MeningACWY requirement The dose must meet the minimum interval from a previous MeningACWY dose.

Recommended Date: This column displays the date that the student is recommended to receive the corresponding immunization.

7th Grade Requirements: The recommended date will be whichever is earlier: the 11th birthday or August 1st of the year the student will enter the 7th grade.

12th Grade Requirement: The recommended date will be whichever is later; the 16th birthday or minimum interval from any previous MeningACWY dose.

Past Due Date: This column displays the date that the student is past due for the corresponding immunization.

7th Grade Requirements: The Past due date will be August 16th of the year the student will enter the 7th grade.

12th Grade Requirement: The Past due date will be whichever is later: August 16th of the year the student will enter the 12th grade or minimum interval from any previous MeningACWY dose.

Other Features on the Immunization History Screen

The Immunization History screen contains links to other IRIS functions. These links are:

Add Immunization: Pressing this button will bring you to the 'Record Immunization' screen for the patient. Refer to the Entering Immunizations chapter in this manual.

Note: This button is only available for enhanced users with the ability to add immunizations. Standard users can only view immunization history and cannot edit or add immunizations.

Edit Patient: Pressing this button will return you to the demographic screen for the patient. Refer to the Editing and Entering Patient Information chapter in this manual.

Reports: Pressing this button will bring you to the Reports Available for this Patient screen. You may generate patient-specific reports. Refer to the School/Childcare Reports Available for Specific Student chapter in this manual.

Print: Pressing this button will display the patient's immunization information without the top or side IRIS menus. To print this screen, click on the printer icon on your browser's tool bar or click File, Print and press OK. Press your browser's back button to return to the patient screen.

Print Confidential: Pressing this button will display the patient's immunization information without top or side IRIS menus and without confidential patient information. To print this window, click on the printer icon on your browser or click File, Print, and press OK.

Press your browser's back button to return to the patient screen.

The **Student Immunization History** screen displays the information held in the IRIS database for the selected student. It is possible to print this screen, but if you do print screens, please note the following:

The Printer Icon or File>Print in the browser isn't an IRIS system function, but rather a function of your browser.

Manage List Screen

The **Manage List** screen is used to create new and manage existing student lists to be used for reporting purposes. A maximum of ten lists can be created by each school. This is noted at the top of the screen.

There are two main sections used in the Manage List screen.

- Manage List
- Report List

Manage List: This section is used to add new lists to your school organization in IRIS. The New List Name text field is displayed. You can enter in a new name and save it as a new list.

Report List: This section displays a table of all lists added to IRIS by the school in alphabetical order. Information contained within the table is described below.

List Name: This column displays the name given to the list by the creator of the list. If you click on the name you can view a detailed display of your students within the list on the Detail List screen.

Last Updated Date: This column displays the date the list was last updated.

Student Count: This column denotes the count of students within the particular list. The count is determined by how many students you have assigned to that list.

Delete: This column displays a delete button for each list. If you click on the delete button you can delete the desired list.

Note: Once you delete a list you cannot retrieve it. Deleting a list removes all students from the list.

Creating a New Student List

1. Enter a name in the ‘New List Name’ text field.

2. Next click the Save button and the list name will be added.

3. The message will appear at the top, “The list has been created successfully.” An example of a list name may be 7th graders. You will later add students to this list.

Note: Once you create a list, you can edit the name of the list later. For example, choose a list name such as “7th grade students.” The following year, compare your 8th grade student roster to this list and simply rename the list “8th grade students.”

Removing a Report List

1. Click on the Delete button to the right of the list.

2. When the Delete button is clicked you will be given a prompt “Are you sure you want to delete this list?” Your option is either Ok or Cancel.

3. Clicking on Ok will delete the list and remove it from the Manage List screen. Clicking Cancel will cancel the delete and return you to the Manage List screen.

Rename a Report List

1. Click the list’s name from the manage list screen.
2. Enter the new list name to the text box next to “Client List for.” 3. Click the Rename button to save changes.
3. When the Rename button is clicked you will be given a prompt: “Are you sure you want to rename this list?” Your options are either OK or Cancel.
4. Clicking Ok will rename the list.
5. Clicking Cancel will cancel the rename and return you to the Manage List screen.

Opening the Report/Student List Screen

1. Click on a list name for the list you wish to view.

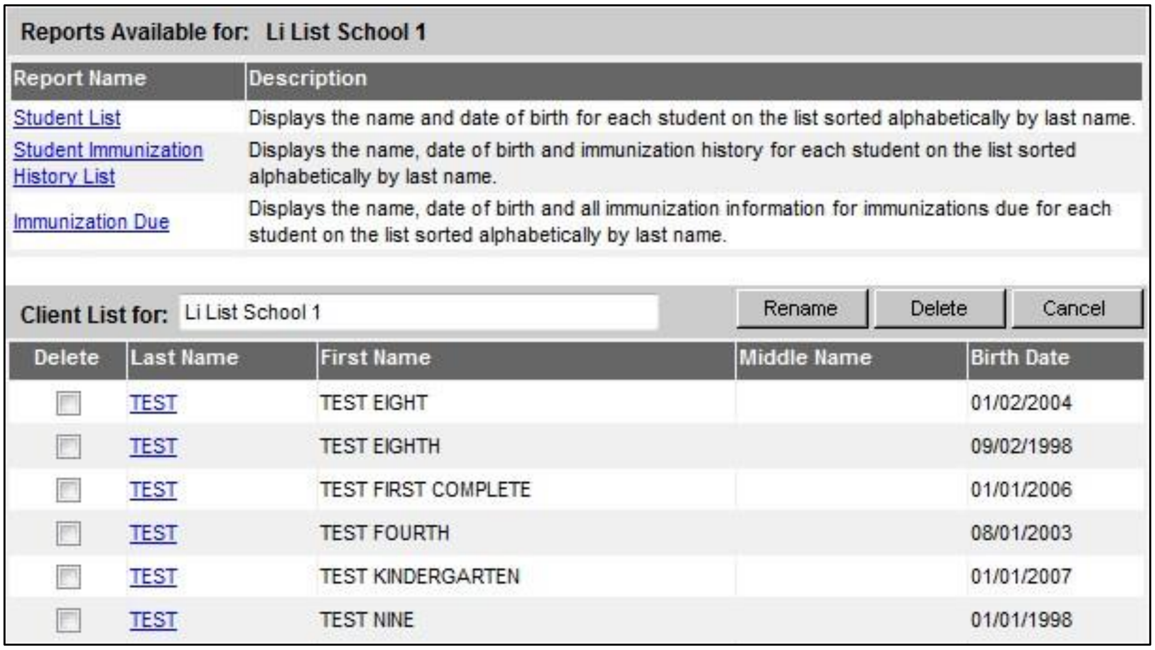
2. You will be taken to the Report/Student List screen where you can view your student list. Further explanation can be found on the Report/Student List section.

Report Student List Screen

The **Report/Student List** screen is used to view students added to your school list and run reports for the students in the list. You can also view a student's history and remove a student from your list.

There are two main sections used in the **Report/Student List** screen.

- Student List
- Reports Available for School



Reports Available for: Li List School 1

Report Name	Description
Student List	Displays the name and date of birth for each student on the list sorted alphabetically by last name.
Student Immunization History List	Displays the name, date of birth and immunization history for each student on the list sorted alphabetically by last name.
Immunization Due	Displays the name, date of birth and all immunization information for immunizations due for each student on the list sorted alphabetically by last name.

Client List for: Li List School 1 Rename Delete Cancel

Delete	Last Name	First Name	Middle Name	Birth Date
☐	TEST	TEST EIGHT		01/02/2004
☐	TEST	TEST EIGHTH		09/02/1998
☐	TEST	TEST FIRST COMPLETE		01/01/2006
☐	TEST	TEST FOURTH		08/01/2003
☐	TEST	TEST KINDERGARTEN		01/01/2007
☐	TEST	TEST NINE		01/01/1998

Student List

This section is for viewing student immunization history, and to remove a student from your list. Information contained within the student list table is described below.

Delete: If you wish to remove a student from your list, place a checkmark in the box beside the student's name in the Delete column. You can remove as many students as you like at one time by checking multiple students. Next, click on the Delete button. Once you have confirmed the delete, a message will display: "The list has been updated successfully" and your student(s) will be removed

Last Name: This displays the student's last name and provides a link back to the Student Immunization History screen.

First Name: This field displays the student's first name.

Middle Name: This field displays the student's middle name.

Birth Date: This field displays the student's date of birth.

Reports Available for Schools

This section provides three student reports within the list:

- **Student List**: This report displays the name and date of birth for each student on the list sorted alphabetically by last name.
- **Student Immunization History List**: This report displays the name, date of birth and immunization history for each student on the list sorted alphabetically by last name.
- **Immunization Due**: This report displays the name, date of birth and all immunization information for immunizations due for each student on the list sorted alphabetically by last name. See Immunization Due Report notes below.

Generating the Student List Report

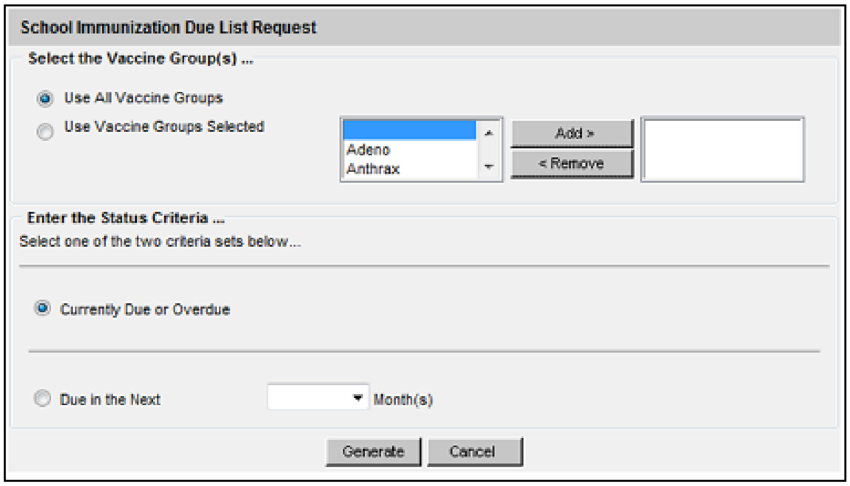
1. Click on the Student List link.
2. The student list report will open in a pdf document.

Generating the Student Immunization History List Report

1. Click on the Student Immunization History List link. You will be taken to the Check School Report screen where you can view the status of the report you are running.
2. Once your report has finished generating, the report name will turn blue, and the report status will say "ready." You can now click the link and view the report.
3. The report displays the Immunization History and the Recommended Vaccines for each student on your list.

Generating the Immunizations Due List Report

When requesting the Immunization Due report you will be taken to a screen where you can enter criteria used for the report. The criteria for this report are explained below.



Selecting Vaccine Groups

Choosing vaccine groups allows you to single out any given vaccines within the selected tracking schedule. If the student is overdue for any of the selected vaccine groups, then he or she will be included in the school report outcome, given all other report criteria are met.

1. Within the 'Select the Vaccine Group(s)' section, select the 'Use All Vaccine Groups' option, or select the 'Use Vaccine Groups Selected' option. If the 'Use vaccine Groups Selected' option is selected, choose the vaccine groups to include.

   - Scroll though the vaccine group list and either double-click on the desired vaccine group name or click on the vaccine group name and then click the Add button. All selected vaccine groups will appear in the right list box in green font.

   - To remove any vaccine groups from the report criteria, either double-click the selected vaccine group name in the right list box or click on the selected vaccine selected vaccine group name from the right list box and then click the Remove button.

Status Criteria

Choosing the status criteria allows you to single out patients based on whether they are Currently Due or Overdue for an immunization or are going to be Due in the next <#> Months.

1. Select whether to return patients based on two criteria:

   - Currently due or overdue for an immunization from the vaccine groups indicated.

   - Will become due for an immunization from the vaccine groups indicated and within the input number of months.

2. Click on Generate

3. You will be taken to the Check School Report screen where you can view the status of the report you are running. Once your report has finished generating, the report name will turn blue, and the report status say “ready.” You can now click the link and view the report. The report displays the Immunizations Due for each student on your list.

Check School Report Screen

The **Check School Report** screen is used to display and/or determine the status of a report request. The screen is separated into two sections.

- School Report Job Status

- School Report Status

School Report Job Status

Started	Completed	Status	Students	Target From	Target To
12/14/2009 10:00 AM	12/14/2009 10:01 AM	100 %	10		

Refresh

Cancel

School Report Status

Name	Type	Requested	Started	Completed	Status
History Report 12-14-2009 10:01:04	Imm. History	12/14/2009 09:56 AM	12/14/2009 09:57 AM	12/14/2009 09:57 AM	Ready

School Report Job Status

This section displays date and time a report was started and completed, the overall status in percentage, the number of students returned, and the target date range if one was specified. You can only have one job listed in this section. Once you run a new report your previous job will be erased.

School Report Status

This section displays reports generated from the Report/Student List screen. It contains the name of the report (i.e. History Report 06-27-2002 09:42:55), the type of report, the date and time the report was requested, what time it started, and the status. Your reports will be sorted by time generated with the most recent report at the top. Based upon your report selection (student immunization history list or immunization due), you will see the status for that report in the top section. If the report returned at least one student, it will place a link below corresponding to the report you selected.

To get the latest update on all the requests listed in the table, click on the Refresh button. This will show the most current status for each request from the IRIS database.

You do not have to remain on this screen while the reports are running. You can navigate away from this screen and go elsewhere in the application while your report runs in the background. To go back to the Check Status screen, click on the School Report link in the menu panel on your left.

As soon as the report name appears as a hyperlink or the status displays as Ready, it has completed processing and is ready for viewing. To view the report, simply click on the desired report name hyperlink. This process may take some time depending on the size of the report. The selected report will automatically be displayed using Adobe Acrobat Reader. If there is a problem viewing your report, please contact the IRIS Help Desk.

At any time, click the Cancel button to return to the screen you were previously on.

School/Childcare Reports Menu Group

Report Lists Available for School or Childcare Organizations

1. Notice of Required Documentation Needed Report

2. Conditional Admission

3. Notice of Exclusion

Each of these forms is available for a group of students or an individual student. IRIS will automatically generate an individualized Required Documentation Needed report and conditional admission report for each student in IRIS. However, the Notice of Exclusion report will print as a blank form. IRIS will allow users to choose the deadline date but the name of each student must be hand-written onto the Notice of Exclusion report only.

Notice of Required Documentation Needed Report for School/Childcare Organization

This letter notifies the parent or legal guardian that the child is not compliant with Idaho's school immunization requirements due to missed immunization(s) or the immunization record has not been made available to the child's school or childcare. School and childcare users can produce Notice of Required Documentation Needed reports for defined groups of students and may print them in English or Spanish.

To create Notice of Required Documentation Needed reports for multiple students, follow these steps:

1. Click required documentation link under School/Childcare Reports on the menu panel.

2. Student Population: Select one of the following options to identify the group that will be included in the Required Documentation Needed report:

    1) Click the top button to include all students in the school/childcare.

    2) The middle button and enter the graduation year in the field provided to include students within the specified graduation year.

    3) Click the bottom button, highlight the desired list, and press Add> button to include students from a predefined list. Student lists may be created or modified by clicking Manage Lists under School/Childcare Access on the menu panel.

3. Age or Birth Date Range: Select one of the following options to further define the group to be included in the report:

1) Click the top button to include all students in the population.

2) Click the middle button to narrow the selected student group by birth date. When a birth date range is specified, the report will only return those clients who have a birth date that falls within the range entered. Enter the earliest and the latest birth dates in the MMDDYYYY format in the text boxes provided.

3) Click the bottom button to narrow the selected student group by age. When an age range is specified, the report will return only those clients whose age falls within the age range entered. Enter the youngest and oldest ages (in days, months, or years) in the text boxes provided.

4. Language Options: Select one of the following options to choose the language in which the Required Documentation Needed report will be generated:

   1) Click the top button to print the Required Documentation Needed report in the primary contact language on file for each student.

   2) Click the bottom button to print the Required Documentation Needed report in one language for all students identified. Use the options list provided to select a language.

5. Deadline Date: Enter the date by which the parent or legal guardian must either provide the immunization information requested or select a waiver option, then return the form to the child's school/childcare. Enter the date in the text box in MMDDYYYY format or select a date using the calendar feature. The deadline date cannot be prior to the current date.

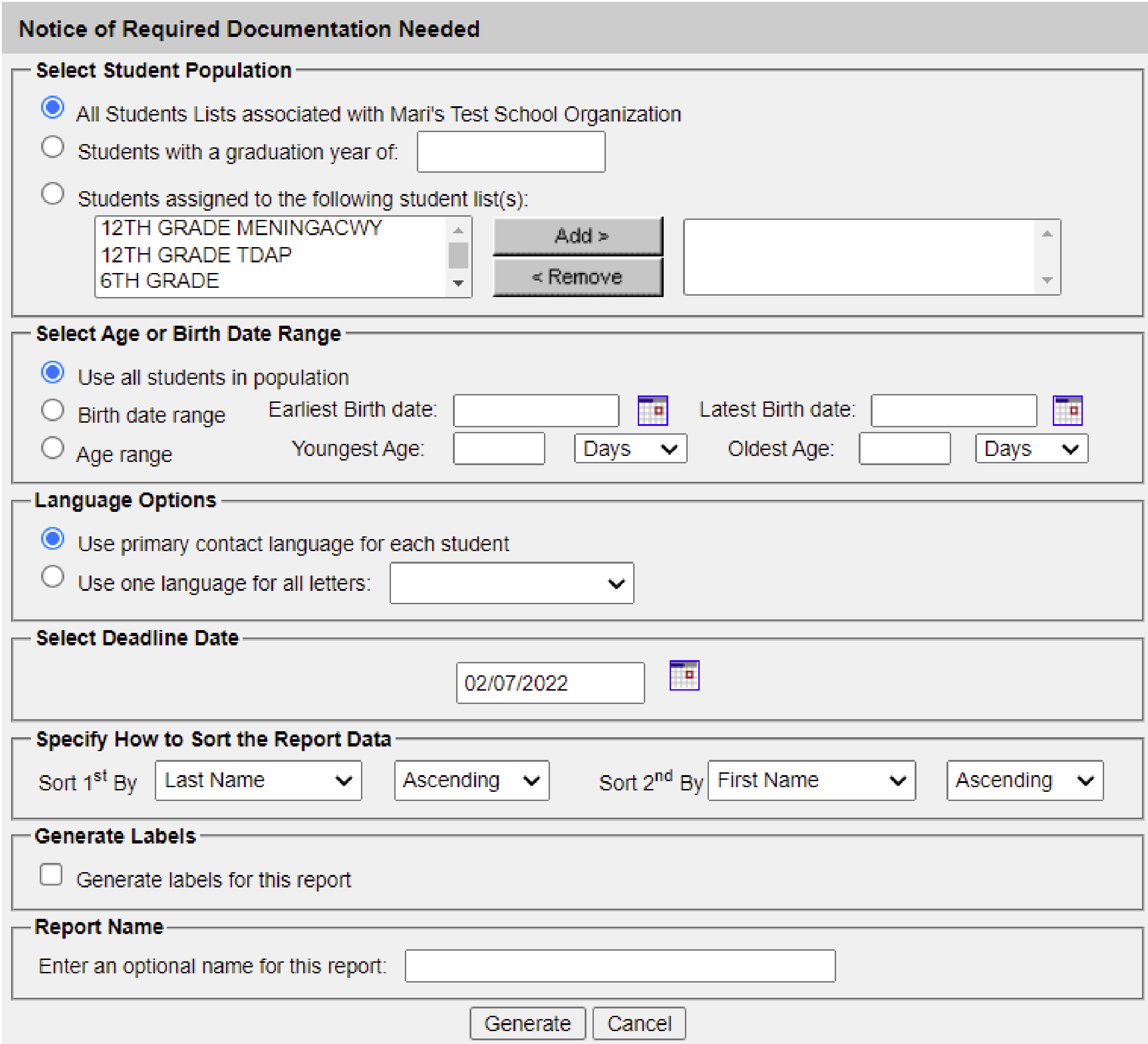
6. Sort the Report Data: This section allows you to specify how the data will be sorted. If a sort order is not specified, WIR will sort the report results first by the student's last name in ascending order (A to Z), then by the first name in ascending order.

   - Sort 1st By: Select either last name or first name from the first option list; then select ascending or descending from the second option list.

   - Sort 2nd By: Select either last name or first name from the first option list; then select ascending or descending from the second option list.

7. Generate Labels: Check this box if you wish to generate an address list formatted to be printed on Avery Standard Labels (5160).

8. Report Name (Optional): If desired, enter a name for the report.



9. Press the Generate button. Depending on the display. Check the status of the reports by pressing the Refresh button periodically. You may work in other areas of the system while waiting for your reports to complete. If you navigate away from the report status screen, click check required documentation link under School/Childcare Reports on the menu panel.

Once the report name is underlined and appears in blue, you may click the link to open the report.

If no student is generated in the report, the report name will not be underlined, there will be no link to open the report, and Record Count will be 0.

If you checked the Generate Labels box, your labels will appear as a separate link.

Notice of Required Documentation Request Status Refresh

Report Name	Started	Completed	Status	Record Count
Mailing Label	01/24/2022 09:17 AM	01/24/2022 09:18 AM	100%	69
Required Documentation Needed Report (English)	01/24/2022 09:17 AM	01/24/2022 09:18 AM	100%	69
Mailing Label	01/24/2022 09:17 AM	01/24/2022 09:17 AM	100%	2
Required Documentation Needed Report (Spanish)	01/24/2022 09:17 AM	01/24/2022 09:17 AM	100%	2

Conditional Admission Report for School Organization

This letter notifies the parent or legal guardian that the student has not received all the required immunizations for school admission and that the student is eligible for conditional attendance. To be eligible for conditional attendance, a student must have received at least one dose of each required vaccine and currently be on schedule for subsequent immunizations following the interval. School users can produce Conditional Admission reports for defined groups of students and may print them in English or Spanish.

To produce Conditional Admission reports for multiple students, follow the same steps as described above in the section on generating a Required Documentation Needed Report.

Conditional Attendance Report for Childcare Organization

This letter notifies the parent or legal guardian that the child has not received all the required immunizations according to the age-deadline for childcare admission and the child is eligible for conditional attendance.

To be eligible for conditional attendance, a child 3 months old and older must have received at least one dose of each required vaccine and currently be on schedule for subsequent immunizations. Childcare users can produce Conditional Attendance reports for defined groups of children and may print them in English or Spanish.

To Produce Conditional Attendance reports for multiple children, follow the same steps as described above in the chapter on generating a Required Documentation Needed Report.

Notice of Exclusion Report for School/Childcare Organization

This letter notifies the parent or legal guardian that the child is currently not in compliance with Idaho's School Immunization Law and therefore will be excluded from school on an effective date.

To generate the Notice of Exclusion report, follow these steps:

1. Effective Date: Enter the date by which the parent or legal guardian must either provide the immunization information requested or return a completed exemption form to the child's school/childcare. Enter the date in the text box in MMDDYYYY format or select a date using the calendar feature. The default effective date is the current date + 14 days. The effective date cannot be prior to current date.

2. Language: Use the pick list provided to select a language, in English or Spanish.

3. Press the Generate Report button that appears to the right of the effective date

School/Childcare Reports Available for Specific Student

IRIS school/childcare users are able to generate Required Documentation Needed and Conditional Admission/Attendance report for individual students as well as groups of students. To access the reports available for a specific student, follow these steps:

1. Click Find Student under the School/Childcare Access menu group.

2. Follow steps under Find Student Screen chapter of this manual.

3. Press the Report button that appears to the right of the Personal Information Box

4. The reports that can be generated for the individual student include:

    - **Notice of Required Documentation Needed** report when student status is Incomplete

        (1) Select a language from the pick list: English or Spanish.

        (2) Enter a deadline date by which the parent or guardian must respond to the notice. The default deadline date is the current date + 14 days. The deadline date cannot be prior to the current date.

        (3) Click the blue underlined report name.

- **Conditional Admission (School)** or **Conditional Attendance (Childcare)** report may be generated when a student's status is conditionally admitting/attending.

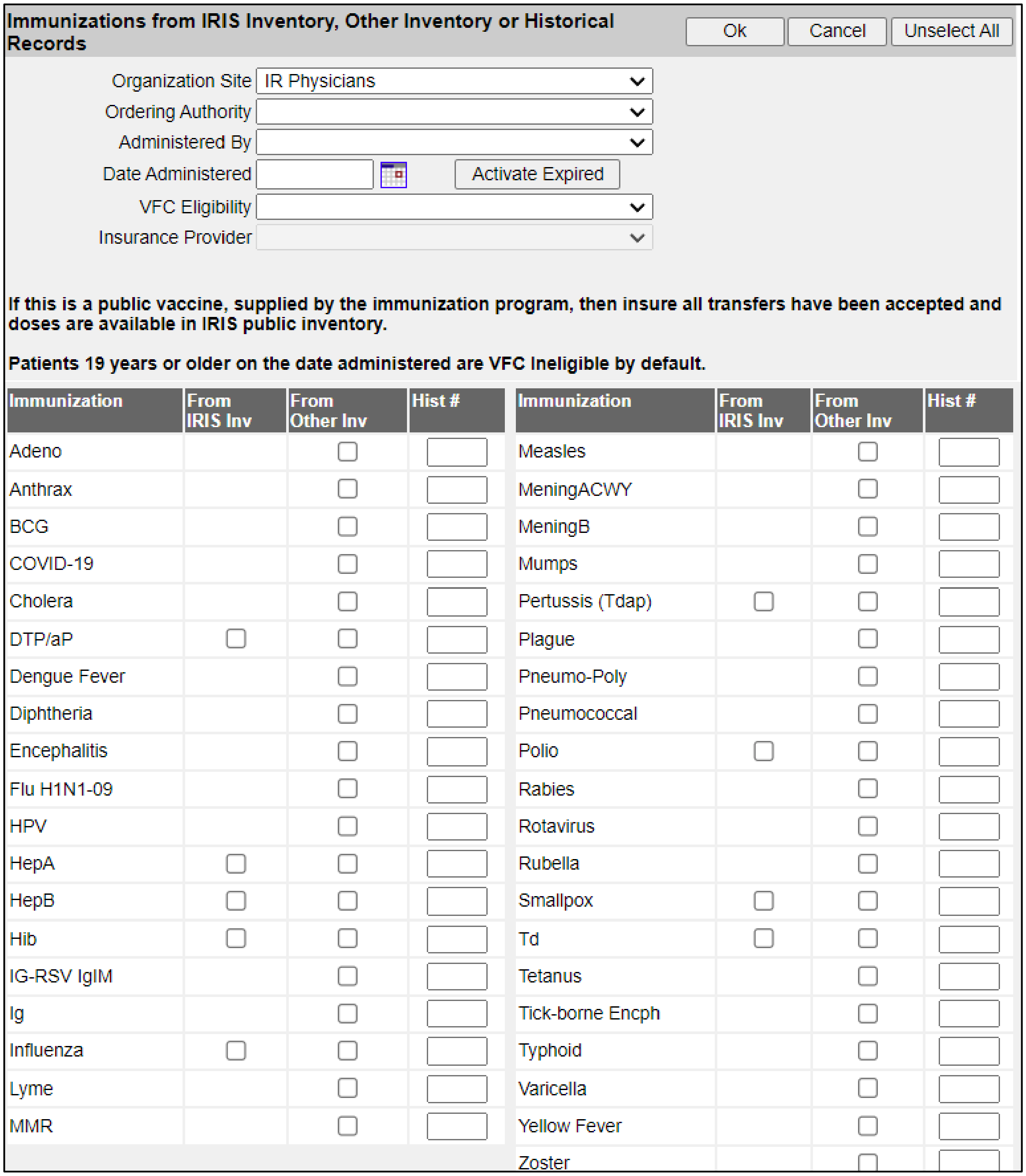
  (1) Select a language from the pick list: English or Spanish.

  (2) Click the blue underlined report name.

Entering Immunizations

To add new and/or historical immunizations, follow these steps:

1. To enter the pre-selected immunizations from the Vaccines Recommended Tracking Schedule, Press Add Selected within the tracking schedule.
2. To enter immunizations other than those pre-selected, press Add Immunization to display a list of immunizations on the IRIS, Other or Historical inventory screen.



Immunizations from IRIS Inventory, Other Inventory or Historical Records

Ok | Cancel | Unselect All

Organization Site: IR Physicians
Ordering Authority:
Administered By:
Date Administered: | Activate Expired
VFC Eligibility:
Insurance Provider:

If this is a public vaccine, supplied by the immunization program, then insure all transfers have been accepted and doses are available in IRIS public inventory.

Patients 19 years or older on the date administered are VFC Ineligible by default.

Immunization	From IRIS Inv	From Other Inv	Hist #	Immunization	From IRIS Inv	From Other Inv	Hist #
Adeno		☐		Measles		☐	
Anthrax		☐		MeningACWY		☐	
BCG		☐		MeningB		☐	
COVID-19		☐		Mumps		☐	
Cholera		☐		Pertussis (Tdap)	☐	☐	
DTP/aP	☐	☐		Plague		☐	
Dengue Fever		☐		Pneumo-Poly		☐	
Diphtheria		☐		Pneumococcal		☐	
Encephalitis		☐		Polio	☐	☐	
Flu H1N1-09		☐		Rabies		☐	
HPV		☐		Rotavirus		☐	
HepA	☐	☐		Rubella		☐	
HepB	☐	☐		Smallpox	☐	☐	
Hib	☐	☐		Td	☐	☐	
IG-RSV IgIM		☐		Tetanus		☐	
Ig		☐		Tick-borne Encph		☐	
Influenza	☐	☐		Typhoid		☐	
Lyme		☐		Varicella		☐	
MMR		☐		Yellow Fever		☐	
				Zoster		☐	

3. You may choose a default Organization Site, Ordering Authority, and Administered By value for new immunizations by choosing from the drop down lists in the New Immunizations section. You will be able to edit these fields for each immunization on the Record Immunizations screen. These fields are set up and managed by the Administrative user of IRIS for your organization. Refer to "Managing Clinicians" in Chapter 8 of the IRIS User Manual.

4. Choose a date for the Date Administered field using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. If using the calendar icon, choose a month and year from the drop down lists provided and choose a day by clicking on the appropriate calendar day. If you leave this field blank, IRIS will default the date administered to the current day.
5. Choose a VFC Eligibility. The VFC eligibility is populated based on the patient's age on Date Administered
6. Choose an Insurance Provider when VFC eligibility is not blank. The Insurance Provider will not be editable when no VFC eligibility is selected(blank)
7. The message below Insurance Provider describes the VFC Eligibility and Insurance Provider requirements.
8. Select the check boxes in the **From IRIS Inv or From Other Inv** column for the vaccines that were given by your organization.
   - **'From IRIS Inv'** means the provider is administering a new immunization from Inventory managed in the IRIS Inventory module. Doses given will be automatically decremented in IRIS inventory on hand accordingly.
   - **'From Other Inv'** means the provider is administering a new immunization from Inventory managed locally outside of the IRIS Inventory module, such as Immunizations given to adults from private funded inventory. Doses given will not impact IRIS Inventory on hand.
   - The column called **Hist#** allows the user to enter the number of historical immunizations being entered from another provider's records.
     - Select historical immunizations by typing the number of immunizations administered for each vaccine into the text box in the **Hist** # column. For example, if a patient received two historical DTaP vaccines, enter "2" in the **Hist** # box.
9. To advance to the Immunization Details screen, press OK.

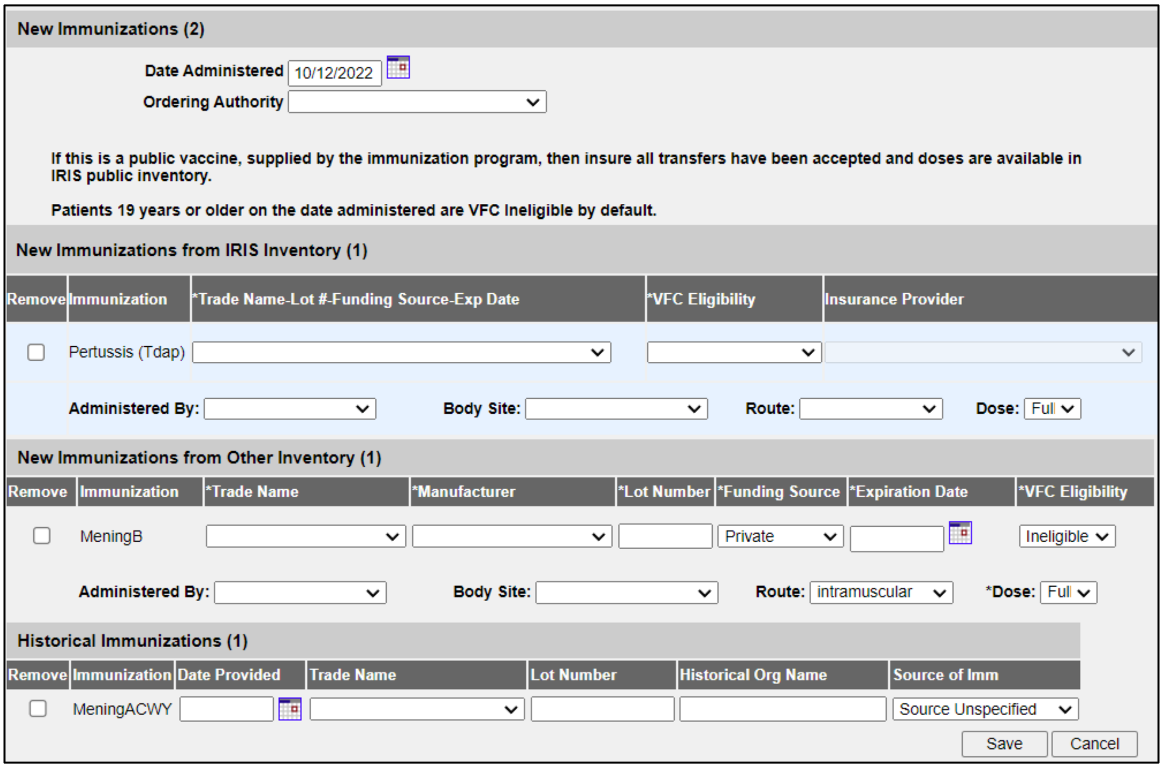
Note: When you go to the Immunization Details screen to select the "Trade Name – Lot" from IRIS inventory, the vaccines displayed in the drop down list will reflect the inventory of the current date, rather than the date the immunizations may have actually occurred. To adjust the vaccine listing to reflect the inventory of a past date, follow these steps:

1. On the IRIS, Other or Historical inventory screen, enter the Date Administered.
2. Press the Activate Expired button to the right of the Date Administered fields.

   For additional instruction on this feature, contact the IRIS Help Desk.

Immunization Detail Entry Screen

1. After selecting OK from the IRIS, Other or Historical Inventory screen, the Immunization Detail Entry Screen will display:



2. New Immunizations - Verify or enter the Date Administered and Ordering Authority for the new immunization(s) listed in the New Immunizations table.
3. The Immunization rows are displayed with alternating background colors to differentiate the immunizations
4. Place a check in the Remove check box only if this immunization should not be entered into the IRIS database. For example, if IRIS informs you that the immunization is a duplicate, you should remove or modify the entry.
5. New Immunizations from IRIS Inventory (X)
   - **a.** The Trade Name, Lot Number, Funding Source and Lot Expiry Date are combined into a single field. Choose a Trade Name-Lot-Funding Source-Exp Date from the drop down list for the listed vaccine. This is a required field for all new immunizations from IRIS Inventory.
   - **b.** Choose a VFC Eligibility for the new immunization based on the Date Administered and Funding Type of the Lot.

c. Choose an Insurance Provider based on the Date Administered, Funding Type of the Lot and VFC Eligibility. Insurance Provider will not be editable when VFC Eligibility is empty.

d. Administered By: This field should be filled with the name of the clinician that administered the immunization.

e. Body Site: This field should be filled with the area of the body where the immunization was given.

f. Route: This field should be filled with the method of administration; for example, intramuscular, oral, etc. This field will display default data.

g. Dose: This field should be filled with the dosage given to the patient. Use the drop down list to select full, half, or multiple doses.

6. New Immunizations from Other Inventory (X)

a. Select the Trade Name from a list of current trade names available in the U.S. . This is a required field for all new immunizations from IRIS Inventory.

b. Manufacturer will be populated from a list of current manufacturers for the trade name selected. This is a required field for all new immunizations from IRIS Inventory.

c. Type in the Lot Number of the vaccine lot administered. This is a required field for all new immunizations from IRIS Inventory.

d. Select the Funding Source of the vaccine lot administered This is a required field for all new immunizations from IRIS Inventory.

e. Enter the Expiration Date of the vaccine lot administered. Expiration date must be in MM/DD/YYYY format and cannot be before the administered date. This is a required field for all new immunizations from IRIS Inventory.

f. VFC Eligibility will default to Ineligible.

g. Administered By: This field should be filled with the name of the clinician that administered the immunization.

h. Body Site: This field should be filled with the area of the body where the immunization was given.

i. Route: This field should be filled with the method of administration; for example, intramuscular, oral, etc. This field will display default data.

j. Dose: This field should be filled with the dosage given to the patient. Use the drop down list to select full, half, or multiple doses.

7. Historical Immunizations X)

   a. Under Historical Immunizations, enter a Date Provided in MM/DD/YYYY format. This is a required field for all historical immunizations

   b. Select Trade Name if known.

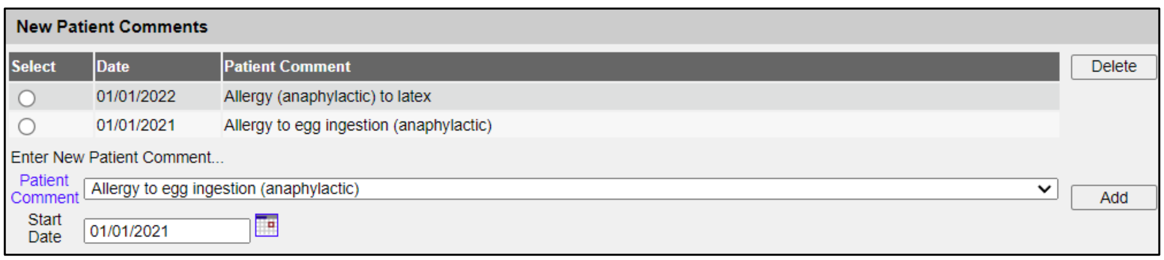
   c. Type in Lot Number if known.

   d. Enter Historical Org Name if known.

   e. Select Source of Immunization information.

8. Under Patient Comments, select a comment or refusal from the drop down list, if applicable. Enter an 'Start Date'

   a. for each comment, then press Add to enter a new comment. You may also click the radio button next to an existing comment and press Delete to remove it.



9. When immunization details are complete, press Save.

10. IRIS will take you back to the Immunization History screen and display the newly entered vaccines with dates and validation, in addition to updated vaccine recommendations.

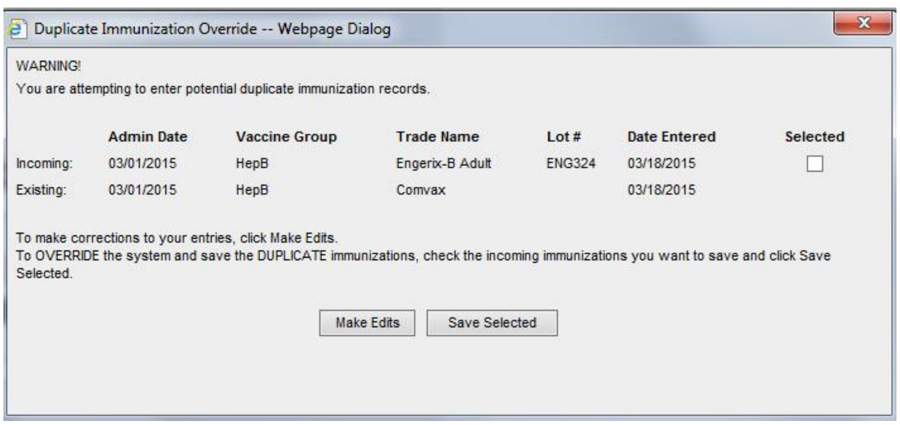
Note: At the bottom of the Immunization Details Entry screen, default VIS dates will be displayed for each new immunization entered. To change the default VIS date, follow the instructions under the "Editing Owned Immunizations from Inventory" section of this chapter.

Duplicate Immunizations

IRIS does not allow duplicate immunizations to be entered for a patient. If you attempt to enter an immunization for a patient given within two days before or after an existing immunization with the same trade name, you will receive the message, “Possible duplicate immunizations exist. Modify or delete your entries.” IRIS will then allow you to change or delete the entry(s) in question.

If you receive a duplicate immunization override warning, follow these steps:

1. In the duplicate immunization override warning dialog box, review all immunizations to determine whether there are any duplicates. If the immunization(s) you entered need to be removed or edited, press “Make Edits.” At the Record Immunization screen, make changes or remove immunizations as needed. Press OK.



2. If an immunization listed in the warning dialog box is not a duplicate, select the checkbox(es) next to the immunization(s) to enter it as a separate vaccine event and press Save Selected

Note: The following scenarios explain how IRIS overrides duplicate immunization records:

If there is a historical immunization on file and the same immunization is entered from IRIS inventory, no warning message will appear; instead, it processes the new immunization and removes the historical immunization.

Applying a Prerequisite Override to a Patient's Immunization

A prerequisite override is a command within a tracking schedule that allows users to override a prerequisite vaccine once a patient reaches a certain age. A prerequisite override is not automatically applied to an individual patient's immunization record. To apply a prerequisite override to an immunization, follow these steps:

1. Enter the immunization as described in the Entering Immunizations section of this chapter. You may notice that, as in the case of Td, the immunization will appear on the immunization history as one of a series, when in fact it is a booster immunization. The next two steps will correct this.

2. Follow Steps 1-3 in the Editing Owned Immunization from Inventory section of this chapter.

3. In the field marked Disregard Primary Series, choose yes. Note: this field will only appear open if the conditions (the chosen tracking schedule has an override on the vaccine and the age of the patient is greater than or equal to the override age) meet those of the prerequisite override.

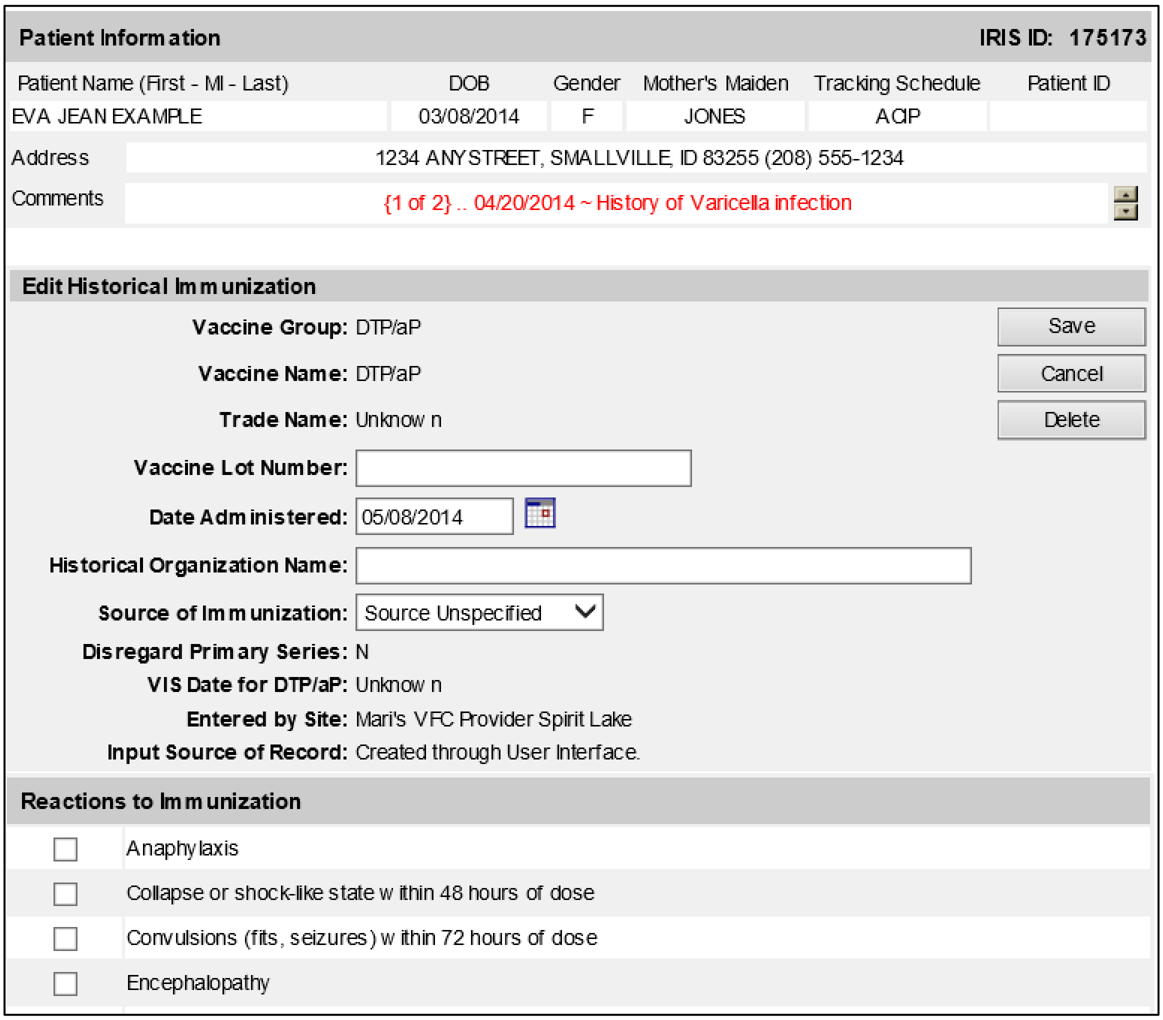
4. Press **Save**.

Editing Immunizations

Editing Historical Immunizations

To edit a historical immunization, use the following steps:

1. On the Immunization History table, select the historical vaccine record you wish to edit by clicking on the vaccine's notepad icon in the "Edit" column.



Patient Information — IRIS ID: 175173

Patient Name (First - MI - Last)	DOB	Gender	Mother's Maiden	Tracking Schedule	Patient ID
EVA JEAN EXAMPLE	03/08/2014	F	JONES	ACIP	

Address: 1234 ANYSTREET, SMALLVILLE, ID 83255 (208) 555-1234

Comments: {1 of 2} .. 04/20/2014 ~ History of Varicella infection

Edit Historical Immunization

Save | Cancel | Delete

Vaccine Group: DTP/aP
Vaccine Name: DTP/aP
Trade Name: Unknown
Vaccine Lot Number:
Date Administered: 05/08/2014
Historical Organization Name:
Source of Immunization: Source Unspecified
Disregard Primary Series: N
VIS Date for DTP/aP: Unknown
Entered by Site: Mari's VFC Provider Spirit Lake
Input Source of Record: Created through User Interface.

Reactions to Immunization

- [ ] Anaphylaxis
- [ ] Collapse or shock-like state within 48 hours of dose
- [ ] Convulsions (fits, seizures) within 72 hours of dose
- [ ] Encephalopathy

2. In the Edit Historical Immunization screen, you may edit information for the Vaccine Lot Number, Date Administered, Provider Organization Name and Source of Immunization Fields.

3. To record a reaction to a vaccine, check the box to the left of the reaction in the Reactions to Immunization section.

4. Press Save.

Deleting Historical Immunizations

To delete a historical immunization, follow these steps:

1. On the Immunization History table, select the historical vaccine record you wish to delete by clicking on the vaccine's notepad icon in the "Edit" column.

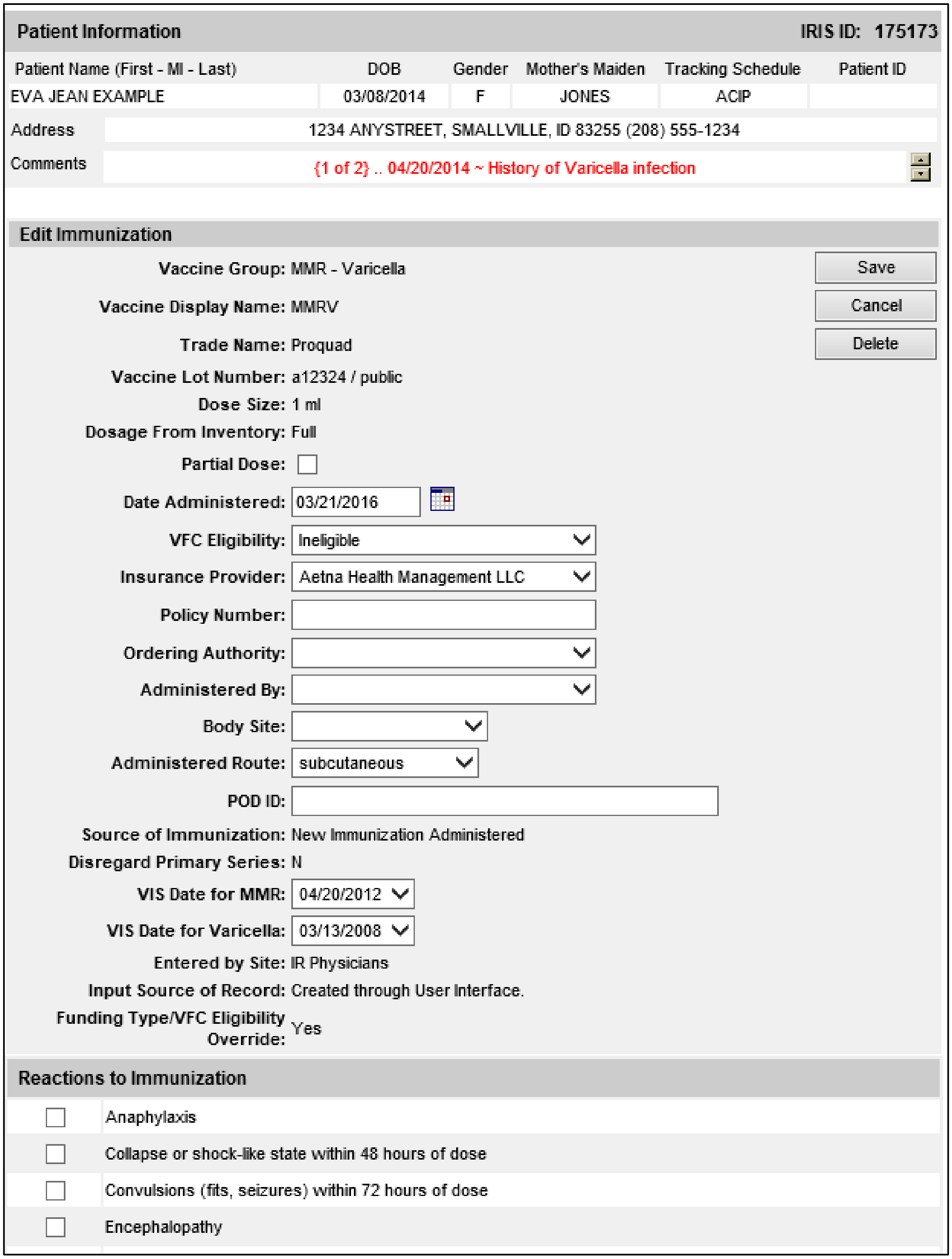
2. At the Edit Historical Immunization screen, press Delete.

3. Press OK in the confirmation box.

Editing Owned Immunizations from Inventory

An immunization that is not historical is one that was given out of an organization's inventory. You will not be able to edit non-historical immunizations that are owned by another organization. To edit an immunization record that is an owned immunization, administered by your organization, follow these steps:

1. On the Immunization History table, select the vaccine record you wish to edit by clicking on the vaccine's notepad icon in the "Edit" column.



Patient Information IRIS ID: 175173

Patient Name (First - MI - Last)	DOB	Gender	Mother's Maiden	Tracking Schedule	Patient ID
EVA JEAN EXAMPLE	03/08/2014	F	JONES	ACIP	

Address: 1234 ANYSTREET, SMALLVILLE, ID 83255 (208) 555-1234

Comments: {1 of 2} .. 04/20/2014 ~ History of Varicella infection

Edit Immunization

Save | Cancel | Delete

Vaccine Group: MMR - Varicella
Vaccine Display Name: MMRV
Trade Name: Proquad
Vaccine Lot Number: a12324 / public
Dose Size: 1 ml
Dosage From Inventory: Full
Partial Dose:
Date Administered: 03/21/2016
VFC Eligibility: Ineligible
Insurance Provider: Aetna Health Management LLC
Policy Number:
Ordering Authority:
Administered By:
Body Site:
Administered Route: subcutaneous
POD ID:
Source of Immunization: New Immunization Administered
Disregard Primary Series: N
VIS Date for MMR: 04/20/2012
VIS Date for Varicella: 03/13/2008
Entered by Site: IR Physicians
Input Source of Record: Created through User Interface.
Funding Type/VFC Eligibility Override: Yes

Reactions to Immunization

- Anaphylaxis
- Collapse or shock-like state within 48 hours of dose
- Convulsions (fits, seizures) within 72 hours of dose
- Encephalopathy

2. To indicate a partial dosage, check the Partial Dose checkbox. For example, check this box if a partial dosage was administered because the needle broke or was removed too soon.

3. Update information in the Date Administered, VFC Eligibility, Insurance Provider, Policy Number, Ordering Authority, Insurance Provider (if VFC Ineligible), Insurance Policy Number if (VFC Ineligible), Administered By, Body Site and/or Administered Route fields on the Edit Immunization screen.

4. To indicate a Vaccine Information Statement (VIS) date other than the most current (default) date, choose an alternate date from the drop down list.

5. To record a reaction to the immunization, check the box next to the applicable reaction.

6. Press Save.

Deleting Owned Immunizations from Inventory

Note that you will not be able to delete non-historical immunizations that are owned by another organization.

1. On the Immunization History table, select the vaccine you wish to delete by clicking on the vaccine's notebook icon in the "Edit" column.

2. At the Edit Immunization screen, press Delete.

3. Press OK in the delete confirmation box.

Editing/Entering Patient Information

The demographic screen allows you to update or change specific, non-immunization information relating to any patient in IRIS. The Enter New Patient screen, accessed by clicking **Enter New Patient** within the School Access or Childcare Access section of the menu panel, allows you to input information for a new patient into IRIS. The demographic and Enter New Patient screens are divided into the following sections: Personal Information, Patient Information, Address Information, Responsible Persons, and Patient Comments.

Personal Information Section

The Personal Information Section at the top of the Demographic/Enter New Patient screens contains patient-specific information used primarily to identify patients when conducting patient searches. All fields shown in blue font are required. Refer to Appendix 2 of this manual for information on allowable entry characters and names for these fields.

1. **Last Name**: This is a required field.

2. **First name**: This is a required field.

3. **Middle name**: This is an optional field.

4. **Suffix:** This is an optional field.

5. **Birth Date:** This is a required field. Fill in the field using the MM/DD/YYYY format or use the pop-up calendar by clicking the calendar icon to the right of the field. Then choose a month and year from the drop down lists at the top and choose a day by clicking on the appropriate calendar day. Press OK.

   Children entered through information provided by the Idaho Bureau of Vital Records will not have editable birth dates. The parent/guardian must contact the Idaho Bureau of Vital Records and/or the IRIS Help Desk (208) 334-5995 in the event a birth date is in dispute.

6. **Mother's Maiden Last Name:** This is a required field. IRIS will allow you to save the record without this field completed; however, it will request you gather this information to avoid future duplication of patients.

7. **Mother's First Name:** This is a required field. IRIS will allow you to save the record without this field completed; however, it will request you gather this information to avoid future duplication of patients.

Note: It is critical that the information in the Mother's Maiden Name fields is accurate. If you do not have the correct information, leave these fields blank. Please do NOT use a fake name, foster mother or type "unknown" in the fields.

8. **Gender:** This is a required field. Select the appropriate option from the drop down list to choose male or female.

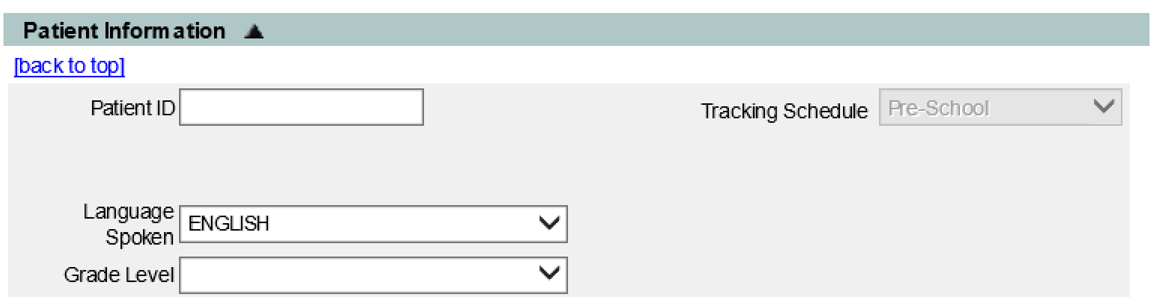
9. **Birth Order:** This is an optional field that identifies the birth order of the patient. This field should only be used for multiple births (e.g. twins, triplets).

10. **Birth Country:** This field defaults to "United States." Use the drop down list to select a different country of birth, if applicable.

Patient Information Section

The Patient Information Section gives additional information about the patient.

Click on the Patient Information Section.



1. **Patient ID:** Type in your organization's patient ID for the patient. Patient ID's are specific to each provider organization. A patient may have separate patient IDs for separate provider organizations.

2. **Grade Level:** This field will only be displayed when the user has been assigned one of the School User roles, Standard or Enhanced. This field will be pre-populated based on Graduation Date.
   - For students with birth dates on or between January 1st and September 1st, the graduation year will equal the birth year + 18.
   - For students with birth dates on or between September 2nd and December 31st, the graduation year will equal the birth year +19.
   - When a student's date of birth is updated, the graduation date and grade level will be re-calculated.
   - Grade level can be manually selected from the drop down pick list.
   - Grade level will progress on August 1st of every year.

3. **Tracking Schedule:** This required field will be pre-populated with the School/Childcare Schedule.

   School Organizations have 4 schedules:
   - Pre-school
   - K-12 Children with a date of birth after 09/01/2005.
   - K-12 Children with a date of birth between 9/1/99 and 9/1/2005.
   - K-12 Children with a date of birth on or after 09/01/1999.

   The schedule will automatically be selected according to the child's age unless the grade level is set to "Preschool."

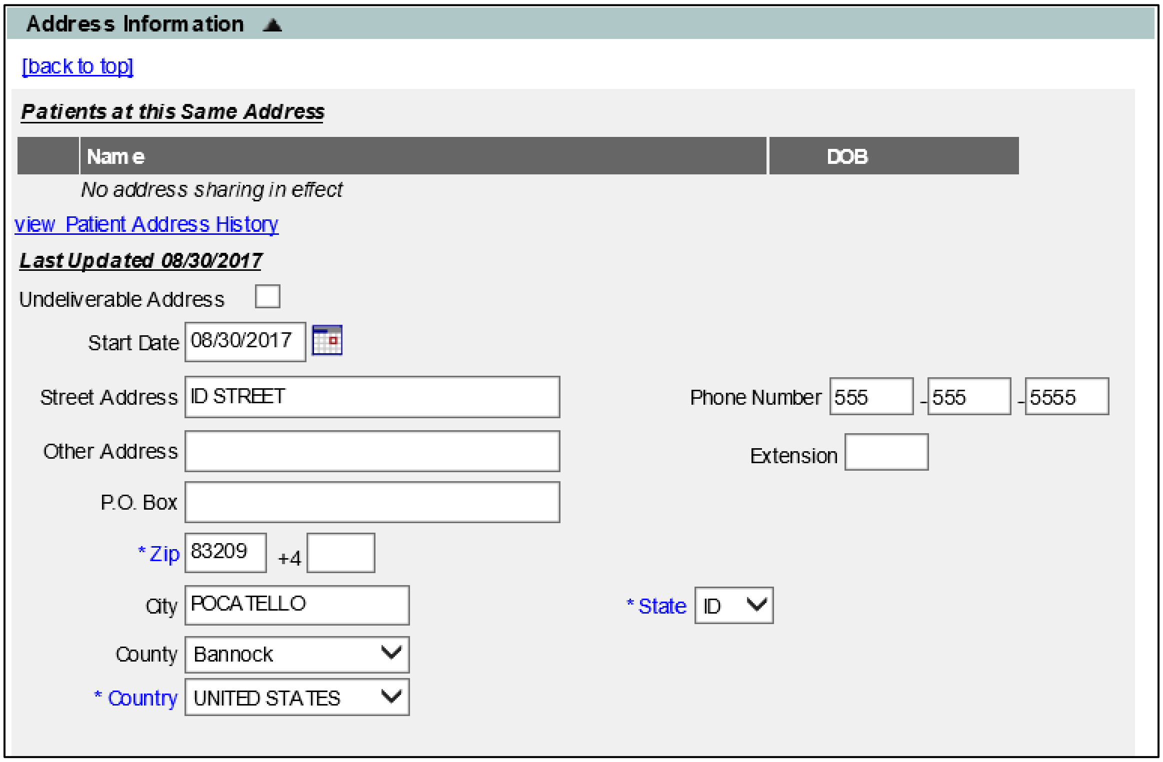
   Childcare Organizations have 1 schedule that will automatically populate.

4. **Language Spoken:** Choose the primary language spoken by the Patient.

Address Information Section

The Address Information Section allows you to identify the current address of the patient. In the future, it will also allow you to identify other siblings in the same household.

Click on the Address Information Section



1. **Undeliverable Address:** Mark this checkbox if information was sent to the patient and the information was returned as not deliverable.

2. **Start Date:** Fill in the start date of the address using the MM/DD/YYYY format or use the pop-up calendar by clicking the calendar icon to the right of the field. Then choose a month and year from the drop down lists at the top and choose a day by clicking on the appropriate calendar day. Press OK to enter the Start Date. This is the Start Date of the Patient's New Address.

3. **Street Address:** Street Address of the patient

4. **Other Address:** Additional address information if applicable; for example, a suite number or apartment number could be entered here

5. **P.O. Box:** Post office box number, if applicable, for the patient

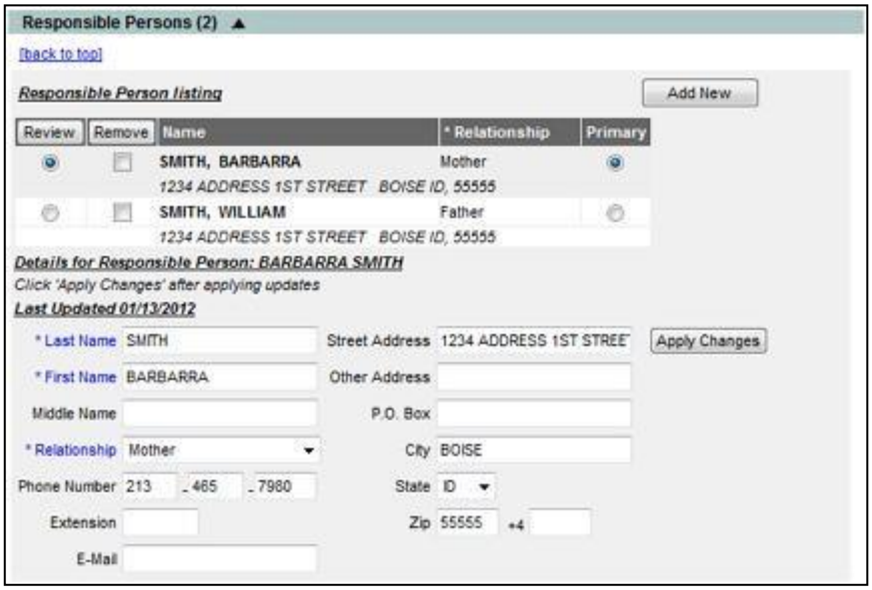
6. **Zip:** Zip code of the patient.   Zip code is required if Country is United State or a US Territory.

Tip: If you enter an Idaho zip code, IRIS will populate the city, state and county for you when the patient is saved.

7. **+4:** Extended zip code numbers of the patient, if available
8. **City:** City (or town) of the patient's address
9. **State:** State of the patient's address. State is required if Country is United State or a US Territory.
10. **County:** County where the patient resides. This list only includes Idaho counties.
11. **Country:** The Country where the patient resides. The Country is a required field.
12. **Phone Number:** Phone number of the patient
13. **Extension:** Phone extension if applicable
14. Clicking the view Patient Address History link will present a window with the patient's address History.

Responsible Persons Section

The Responsible Persons section allows you to identify the patient's emergency contact information. The only required fields under this section are the Last Name, First Name and Relationship fields.



1. To edit an existing responsible person, do the following:

   1) Click on the Review radio button next to the name of the person you wish to edit.

   2) Press Review.

   3) Change or add information for the fields listed.

   4) Press Apply Changes.

   5) Press Save button (Top of Screen).

2. To enter a new responsible person, do the following:

   1) Click the Add New command button.

   2) Enter Information into the following fields:

      - **Last Name:** Enter the last name of the responsible person into this field. This is a required field.

- **First Name:** Enter the first name of the responsible person into this field. This is a required field.
- **Middle Name:** Enter the responsible person's middle name in this field.
- **Relationship:** Choose the relationship of the responsible person to the patient from the drop down list provided. This is a required field.
- **Phone Number:** Enter the responsible person's telephone number, including the area code, in this field.
- **Extension:** Enter the responsible person's extension to the above telephone number, if any, into this field.
- **Email:** Enter the responsible person's Email address into this field.
- **Street Address:** Enter the responsible person's street address into this field.
- **Other Address:** Enter the responsible person's additional address information, if any, into this field. For example, a suite number or apartment number could be entered here.
- **P.O. Box:** Enter the responsible person's post-office box, or mailing address if different than the street address, into this field.
- **City:** Enter the responsible person's city (or town) into this field.
- **State:** Choose the responsible person's state from the drop down list provided.
- **ZIP:** Enter the responsible person's zip code in this field.
- **+4:** Enter the responsible person's +4 zip code in this field.

3. To save the information you entered or edited press Apply Changes, and then press Save (top of screen).

4. To clear existing information and enter a new responsible person, press Add New.

Deleting an existing Responsible Person record

1) Select the Remove check box next to the record you wish to delete on the Responsible Person Listing table.
2) Press Remove.
3) Press Save button (top of screen).

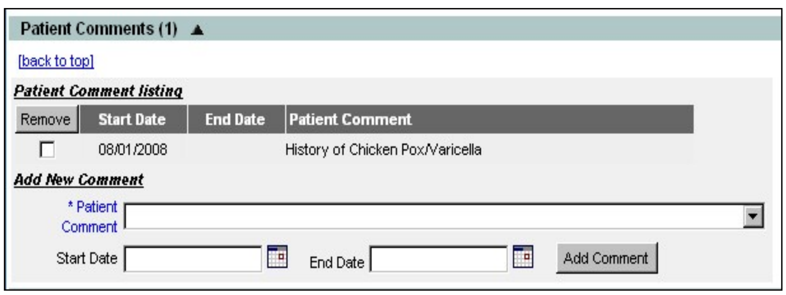
Patient Comments Section

The Patient Comments Section allows you to enter immunization-related comments such as contraindication information for a patient. The patient comments list is derived from a pre-selected CDC-standardized list and is displayed in drop down list form.

Although the “Start Date” is not a required field, a start date must be entered with a contraindication comment in order to properly interact with the immunization schedule for the specified vaccine group. If a start date is not entered the vaccine group that is contraindicated will still be recommended.

The patient comments are visible at the top of the Immunization History, Edit

Immunization, Pre-Select Immunization, and Record Immunization screens. Also, when using the button on the immunization history page, the comments are displayed on separate lines in the Comments box.



1. Enter the following information:

    1) Choose the appropriate comment/contraindication from the Patient Comment drop down list.

    2) Enter the date to which the comment refers in the Start Date field. Fill in the field using the MM/DD/YYYY format or use the pop-up calendar by clicking the calendar icon to the right of the field. Then choose a month and year from the drop down lists at the top and choose a day by clicking on the appropriate calendar day. Press OK.

    3) Enter the date to which the comment Ends in the End Date field. Fill in the field using the MM/DD/YYYY format or use the pop-up calendar by clicking the calendar icon to the right of the field. Then choose a month and year from the drop down lists at the top and choose a day by clicking on the appropriate calendar day. Press OK.

2. To enter the comment into the Patient Comments Listing, press Add Comment.

3. Press the Save button (top of screen).

Restart Comments

If a physician decides to repeat a vaccine series and the appropriate comment and Start Date are entered in IRIS, then all vaccinations prior to that date are not evaluated as part of the series. Any doses recorded on or after the Start Date will be evaluated as if they were the first doses received for that vaccine group.

Immunity Comments

Immunity comments are linked to vaccine group recommendations. If a patient has an immunity comment and a Start Date is specified, a recommendation for that vaccine group will not display on the patient's record.

Patient Refusal of Vaccine Comments

IRIS users should enter refusal comments with appropriate start dates to document vaccine refusal. This information will help other providers understand why a vaccine group might be overdue for a particular patient in IRIS.

Patient Waiver Comments

Waiver comments on file for a patient will preclude that patient from eligibility for the Required Documentation Needed Report, meaning they're not considered out of date (Incomplete) by the system. Patient status will be Exempt.

Only users with a School/Childcare user role are able to view, add and remove these Waiver comments.

Waivers are specific to a single organization. A waiver owned by one organization cannot be viewed by other organizations.

School/Childcare users with the enhanced user role can view, add and remove all patient comments as well as waivers owned by the organization. School/Childcare users with a standard user role can view, add and remove Waiver comments owned by the organization, but can only view non-waiver comments.

Users with a Non-School user role can only view, add and remove non-waiver comments; they will not be able to view waiver comments.

Deleting an existing comment

1. Select the Remove check box next to the comment you wish to delete on the Patient Comment Listing table.

2. Press Remove.

3. Press the Save button (top of screen).

Note: School/Childcare users with a Standard user role are not able to remove non-Waiver comments; there is no Remove check box for non-Waiver comments.

Saving Patient Information

There are several ways to save information on the Demographic/Enter New Patient screens:

Save: When pressed, the Save command button at the top of the screen will save all information fields within the Personal Information Section, Patient Information Section, Address

Information Section, Responsible Persons Section, Patient Comments Section and the Patients Notes Section to the IRIS database. Once the patient data is saved, the message

"Patient record successfully saved" will appear at the top of the Personal Information Header.

History/Recommend: As with the Save command button, the History/Recommend command button will save all information fields. Once the information is saved, the patient's Immunization History screen will display.

Record Immunization: When the Record Immunization command button is pressed, all information fields will be saved and the Pre-Select immunization screen will display. This button allows you to bypass the history screen for a patient and go directly to adding immunizations.

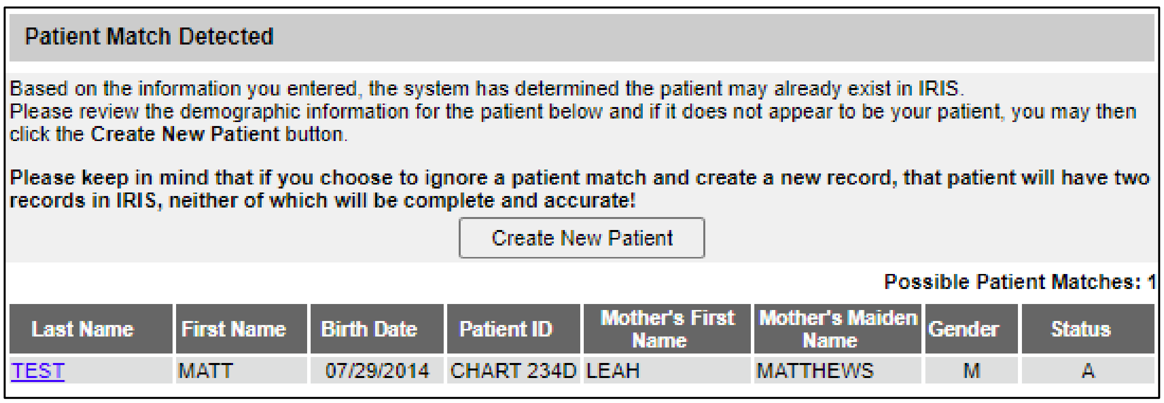
Reports: As with the Save command button, the Reports command button will save all information fields. Once the information is saved, the Reports Available for Patient screen will display so that a report may be generated for the patient. Refer to the Reports and Forms chapter of this manual for more information on reports.

Cancel: When pressed, the Cancel command button clears all entered information and does not save it to IRIS. The Find Patient or Enter New Patient screen is displayed.

Avoiding Duplication of Patient Records

After you enter a new patient and press one of the command buttons that will save the data, IRIS initiates a process that ensures that the patient information you entered does not duplicate a patient that already exists in IRIS.

If, after attempting to save a new patient, you receive a message box titled “Patient Match Detected,” IRIS has determined that the patient you are attempting to save may already exist in the database. A table below the message box will contain one or more names of potential matches within IRIS. Click on each last name to display his or her information. IRIS will identify matching patients even if the patient has had a name change; therefore, if you do receive a list of potential matches, click on the link(s) to determine whether one of the links matches your patient’s record.


Patient Match Detected

Based on the information you entered, the system has determined the patient may already exist in IRIS.
Please review the demographic information for the patient below and if it does not appear to be your patient, you may then click the **Create New Patient** button.

Please keep in mind that if you choose to ignore a patient match and create a new record, that patient will have two records in IRIS, neither of which will be complete and accurate!

Create New Patient

Possible Patient Matches: 1

Last Name	First Name	Birth Date	Patient ID	Mother's First Name	Mother's Maiden Name	Gender	Status
TEST	MATT	07/29/2014	CHART 234D	LEAH	MATTHEWS	M	A

If after reviewing all the names given in the table you do not find a match for your patient, press the Create New Patient button. A confirmation box will appear; press OK. Be aware that if you do override the listed matches and end up creating a duplicate record for a patient, it will be difficult to manage the patient’s immunization and personal information and the registry will lose its accuracy and efficiency. If you identify possible duplicate patient records, call the IRIS Help Desk immediately at (208) 334-5995.

Appendix 1

In the Appendix:

Online Help
IRIS Help Desk

Online Help

The IRIS online help function provides you with both screen-specific help and a general help index. You may access online help from any screen in IRIS by pressing the yellow light bulb on the menu bar in the top right corner of the screen.

Screen-Specific Help

To access screen-specific help, follow these steps:

1. When on any screen where you would like help, press the light bulb on the menu bar located at the top-right of the screen.
2. A box with screen-specific help information will display. This help box may have any or all of the following features:
   - **Purpose:** This section describes what the screen is meant to do or what kind of information needs to be entered.
   - **Information provided:** This section describes in detail the input and output fields that are found on the screen.
   - **Functionality:** This section provides information about specific buttons on the screen and describes their function.
   - **Results:** This section describes the outcome of a search, report, download, or other information entered into the database.
   - **User tips:** This section has advice or further information on how to use this screen.
3. To view these features, you may either click the links under the Purpose section or scroll down the page.
4. To close the help box, press the X button in the top right corner of the box.

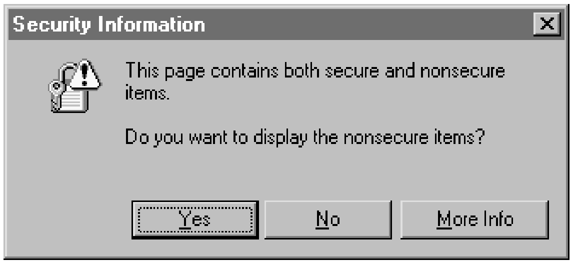
General Help

General help contains information on screens throughout IRIS. You may access this information by viewing the contents of general help, by viewing or searching the general help index, or by searching general help using a keyword.

<u>Contents of General Help</u>

To access the contents of general help, follow these steps:

1. Press the light bulb on the menu bar.
2. Press the Help Contents button in the top left corner of the help box.
3. A box may open asking if you want to display both secure and non-secure items; press Yes .

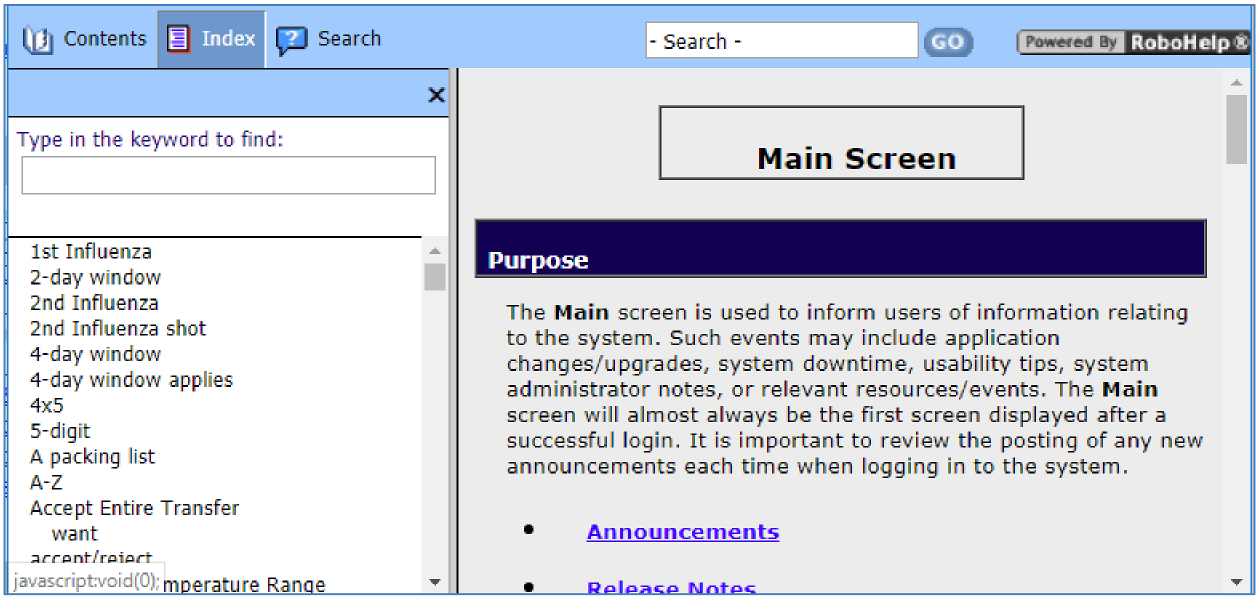


4. The General Help screen now displays. View the left side of the page. A list of topics displays, each with its own book-shaped icon.
5. Select a topic, and a list of help items for that topic displays. Each help item displays with a question mark icon. You may also see further subtopics, each with its own book-shaped icon.
6. Click on the name of the help item to view it. You may also click on the document icon next to the help item.
7. The help information you selected will display on the right side of the General Help screen.
8. Use the links at the top of the screen or scroll down to view the information you need.
9. To return to a previous help screen or to skip ahead one screen, use the browser's Back and Forward buttons.
10. To collapse a topic, select it or click on the book icon next to it. You may toggle back and forth between opening and closing a topic by clicking on the book icon.
11. To close out of the help box, press the X button in the top right corner of the box.

Viewing/Searching the General Help Index

To view or search the general help index, follow these steps:

1. Follow Steps 1-3 under *Contents of General Help*.
2. Press the Index button on the top left side of the General Help screen.



3. To find an index topic, use the scroll bar to view index topics.
4. Click on one of the help items to view the item.
5. The help information you selected will display on the right side of the General Help screen.
6. To return to a previous help screen or to skip ahead one screen, use the browser's Back and Forward buttons.
7. To close out of the help box, press the X button in the top right corner of the box.

IRIS Help Desk

If you are experiencing difficulties or have questions regarding IRIS, you may contact the IRIS Help Desk.

The IRIS Help Desk hours are 8:00 a.m. to 5:00 p.m. MT, Monday through Friday.

Help Desk telephone number: (208) 334-5995

Help Desk e-mail address: *iris@dhw.idaho.gov*

Appendix 2

In the Appendix:

Validation of Patient Entry Data
Disallowed Address Entries
Disallowed First Name Entries
Disallowed Last Name Entries

Validation of Patient Entry Data

IRIS validates the information you enter on the patient screen when you attempt to save the entries. If you have entered data that IRIS considers invalid, a message will appear asking you to re-enter data in the field(s). Validation varies depending on the field. Refer to the chart below for information on validation of data in various fields.

Field Name	Web Page/Section	Characters Allowed
First Name	Enter New Patient/Personal Information, Manage Patient/ Personal Information	Allow only alpha characters, dashes, apostrophes, and periods. Do not save an entry that matches a disallowed name.
Middle Name	Enter New Patient/Personal Information, Manage Patient/ Personal Information	Allow only alpha characters, dashes, apostrophes, and periods.
Last Name	Enter New Patient/Personal Information, Manage Patient/ Personal Information	Allow only alpha characters, dashes, apostrophes, and periods. Do not save an entry that matches a disallowed name.
Mother's First Name	Enter New Patient/Personal Information, Manage Patient/ Personal Information	Allow only alpha characters, dashes, apostrophes, and periods.
Mother's Maiden Last Name	Enter New Patient/Personal Information, Manage Patient/ Personal Information	Allow only alpha characters, dashes, apostrophes, and periods.
Responsible Party First Name	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow only alpha characters, dashes, apostrophes, and periods.
Responsible Party Middle Name	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow only alpha characters, dashes, apostrophes, and periods.
Responsible Party Last Name	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow only alpha characters, dashes, apostrophes, and periods.
Street Address	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow alpha or numeric characters, backslashes, number symbols, dashes, periods, and apostrophes. Do not save quotes. Do not save an entry that matches a disallowed address.
Other Address	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow alpha or numeric characters, backslashes, number symbols, dashes, periods, and apostrophes. Do not save quotes. Do not save an entry that matches a disallowed address.
PO Box	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow alpha or numeric characters, backslashes, number symbols, dashes, and periods. Do not save an entry that matches a disallowed address. Do not save quotes.
E-mail Address	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Must contain "@" symbol and period. Do not save quotes.
Phone Number	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow only numeric characters and dashes. Do not save quotes.
City	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow only alpha characters, dashes, and apostrophes. Do not save quotes.
Zip	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow only numeric characters. Do not save quotes.

Disallowed Address Entries

Disallowed Address Entries	
DO NOT USE	NO CURRENT
UNKNOWN	MOVED
GENERAL DELIVERY	UPDATE
DECEASED	MAIL RETURNED
ADDRESS	COMMENT
FAMILY PLANNING	FAMILY PLANNING
PLANN PARENTHOO	PLANNED PARENTHOOD

Disallowed First Name Entries

The following chart lists first name entries that will not be validated in IRIS.

Disallowed First Names		
AF BABY	INFANTMAL	WLCFS
BABY B	LCFS	XWM
BABY G	LSS	
BABYB	LSS BABY	
BOY I	LWG	
BOY II	NFN	
CSS	NTXHW	
FIRE DEPT	PVN	
GIRL I	SIGNATURE	
GIRL II	SLKDFSLKD	
HBS	SRM	
HRH	THWJ	
ILLEGIBLE SIGNATURE	TOMORROW'S CHILDREN	
INFANT BO	TSWJ	
INFANT FE	TSWM	
INFANT G	TSWV	
INFANT GI	TXWM	
INFANT GIR	UNK	
INFANT GRL	UNKN	
INFANT M	UNKNOEN	
INFANT MA	UNKNOWN	
INFANT MAL	UNKOWN	
INFANTGIR	UNNAMED	

Disallowed Last Name Entries

The following chart lists last name entries that will not be validated in IRIS.

Disallowed Last Names		
A BABY	FF	SMRT
A F BABY	FIRE DEPT	SRB
AF	FWV	SRFC
AF BABY	G BABY	SRP
AF BABY BO	GARCIA INF	SS
AF BABY GI	GSST	T A O
AFBABY	H BABY BOY	FA
B C S	L S S	UN
B S C	LCFD	UNK
BCS	LCFS	UNKN
BCSW	LCSF	UNKNOEN
BRT	LNAME	UNKNOWN
BSC	LS	UNKOWN
C A C	LSDKFSLDK	UNNAMED
C S	LSS	NREADABLE
C S S	LSSFC	V BABY
CAC	LT JR	VLK
CBS	M BABY	WLCFS
CCS	M BABY BOY	Z BABY
CFCFS	NLN	
CS	O BABY	
CSS	P BABY	
CSS BABY	PCS	
CSSW	R BABY	
D S S	S B A	
DCS	S BABY	
DFS	S C I	
DSS	SB	
E BABY	SC	
F BABY	SIGNATURE	

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