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In this chapter:

What Are Immunization Registries?
Why We Need Immunization Registries
The New York State Immunization Information System
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 11,000 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.
The New York State Immunization Information System

The New York State Immunization Information System (NYSIIS) is a population-based web application containing consolidated demographic and immunization history information. NYSIIS 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, vaccine usage and patient reports, and Comprehensive Clinic Assessment Software Application (CoCASA) extracts.
- Managing vaccine inventory.

Immunization Information Systems in New York State are not new. The Citywide Immunization Registry (CIR) has been operational in New York City since 1997. Providers practicing in New York City are required to report to the CIR. Separate from the New York City registry, the New York State Department of Health (NYSDOH) has operated regional software-based voluntary registries since 1997 that cover the areas outside of New York City. These regional registries have been collectively referred to as the New York State Immunization Information System (NYSIIS).

Access to the statewide, web-based system will be available through the Health Provider Network (HPN) on the NYSDOH Health Commerce System. CIR and NYSIIS will operate independently as two different registries, but patient information may be shared across both registries based on the patient’s address. Currently, NYSIIS is receiving weekly updates from the CIR for patients that reside outside the five boroughs but received shots in New York City.

In 2006, New York State passed Article 21, Title 6, Section 2168 of the Public Health Law, which requires health care providers to report all immunizations administered to persons less than 19 years of age to NYSIIS beginning on January 1, 2008.

NYSIIS currently contains all New York State birth data (excluding New York City births) from January 1, 2004 to the present. Vital statistics are currently loading 500 new records daily. A significant percentage of new birth records (90%+) are in NYSIIS within two weeks of birth.

When a provider begins participation in NYSIIS, they can manually enter immunization data directly into NYSIIS or utilize their existing electronic data systems to create a data exchange link with NYSIIS.
System Requirements

In this chapter:
- Internet Access
- Hardware Requirements
- Software Requirements
Internet Access
Since NYSIIS is a web-based application, you will need reliable internet access, preferably with a dedicated high speed connection, to access NYSIIS and the NYSDOH Health Commerce System. A modem connection will also work, but is not recommended.

Hardware Requirements
• The following are minimum hardware requirements for accessing NYSIIS:
  • 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:
  • Microsoft® Internet Explorer, version 7.0 or higher.
  • Netscape® version 7.x is compatible for use with NYSIIS.
  • Windows® XP and all subsequent Windows® versions.
  • Adobe Reader® 6.0 or higher.
• For networked computers, TCP/IP Port 543 of the network firewall must be open for outgoing HTTPS (secure HTTP) connections to access the NYSIIS production application.
Accessing NYSIIS

In this chapter:

Opening NYSIIS
Post Login
Exiting NYSIIS
HCS and NYSIIS Security
Opening NYSIIS

To access NYSIIS:

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 the URL for the New York State Department of Health (NYSDOH) Health Commerce System (HCS): [https://commerce.health.state.ny.us/](https://commerce.health.state.ny.us/) in the address bar, and click enter.

3. On the login page, enter your HCS User Id and Password, and click the Sign In button:

4. Click on NYSIIS – Production in the My Applications menu on the left hand side (instructions on how to add NYSIIS to the My Applications menu on the next page):
To add NYSIIS to the My Applications menu in the HCS:

1. Click on the Applications menu:

2. Browse by ‘N’, for NYSIIS:

3. Click on the + next to NYSIIS Production to add to your My Applications menu:
4. The page that will initially show when logging into NYSIIS through your HCS account will be determined by the setup of your account.

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

   b. User accounts set up with access to more than one organization will be taken to the Manage Access/Account Screen shown below.
Post Login

Once in NYSIIS, you may access the Manage Access/Account Screen to switch organizations, manage users, or manage your own account depending upon your specific role that was assigned to you when your account was set up. To do this, simply click the Manage Access/Account button at the top of the screen in NYSIIS. The Manage Access/Account Screen will display. For more information on the functions available on the Manage Access/Account Screen, refer to the Managing Users and Organizations and Managing My Account chapters of this manual (i.e., Chapters 6 and 7 respectively).

Exiting NYSIIS

To exit from the NYSIIS application, press the logout button on the NYSIIS menu bar at the top of the screen. You may logout this way from any screen within NYSIIS. To log completely out of the Health Commerce System, close your internet browser.

HCS and NYSIIS Security

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

The Health Commerce System will automatically log out a user after four hours, regardless of activity. At this point, you must re-login to the Health Commerce System using your HCS account. Additional Health Commerce Security items include:

- Your account will be locked after 10 unsuccessful login attempts.
- Your account will be disabled after 5 months of inactivity.
- If your account becomes locked or disabled, you must call Commerce Accounts Management Unit (CAMU) at 1- 866-529-1890 to have it reset.
- A New password is required every 90 days.

The NYSIIS application time out is based only on inactivity and will occur after one hour. After you are timed out, you will be given the option to “Go to the NYSIIS page” where you can access the application again.

Notes: Each person that will be accessing NYSIIS is required to have their own individual HCS Account. HCS accounts cannot be shared.
Optimizing NYSIIS

In this chapter:

Optimizing Browser Performance
Running Reports with Adobe Reader®
Efficient Screen Navigation
Optimizing Browser Performance

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.

Deleting Temporary Internet Files (Internet Explorer 7.0)

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. Press OK.
Running Reports with Adobe Reader®

NYSIIS 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 Adobe Reader® Files
The first time a report is displayed using Adobe 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 Adobe Reader® and find that some of the text is illegible, choose File, Preferences, and General on the Adobe Reader® menu bar. In the General Preferences dialog box, make sure the “Smooth Text and Images” box is checked.

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

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

Try to run your report again. If you continue to have problems, contact the NYSIIS Help Desk at (866) 389-0371.

File Transfer Protocol Server Access
When running reports and data downloads, NYSIIS 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 NYSIIS 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 NYSIIS, 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 NYSIIS
Shortcuts below that are marked with an asterisk (*) behave differently in Netscape® than they do in Internet Explorer. Read the explanation for the shortcut in question for more information.

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 click 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 pressing 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 NYSIIS

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; Netscape® does not. 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, NYSIIS 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.
Home Page

In this chapter:

Menu Bar
Menu Panel
Announcements
Release Notes
Inventory Alerts
To access the NYSIIS home page, please follow the instructions outlined in the “Opening NYSIIS” section of Chapter 3 of the NYSIIS User Manual.

**Note:** All NYSIIS end-users must obtain a unique HCS ID before gaining access to the NYSIIS application. The HCS ID is used to establish each user’s NYSIIS account.

The home page of NYSIIS is divided into several sections. It may be necessary to use the vertical scroll bar to the right of the NYSIIS 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 NYSIIS. The options available are the following:

**Home:** Clicking this menu option will return you to the NYSIIS home page from anywhere in the application.
**Manage Access/Account:** Clicking this menu option will bring you to the Manage Access/Account page, where you may switch organizations, manage your account, or manage access to other accounts. Refer to the Managing Users and Organizations and Managing My Account chapters of this manual for more information on these functions (i.e., Chapters 6 and 7 respectively).

**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, consent forms, and parent notification letter.

**Related Links:** Clicking on this menu option displays links to other web sites that contain information of interest to the immunization community.

**Logout:** Clicking on this menu option will log you out of your current NYSIIS session. You may logout from any screen within NYSIIS. The system then gives you the option of going to the NYSIIS page on the NYSIIS public website or to the Health Commerce System welcome page.

**Help Desk:** Clicking on the Help Desk menu option will give you a screen with contact information for the NYSIIS Help Desk.

**Online Help:** Clicking on 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 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 NYSIIS for your organization. If any of this information is incorrect, contact your organization’s NYSIIS administrative user. The Administrative User should refer to Chapter 6, Managing Users and Organizations for instructions on revising organization and user information.

**Menu Panel**
The menu panel is shaded in blue and appears on the left of all screens within NYSIIS.

**Menu Selections**
These links, which include functions under Patients, Immunizations, Reports, Maintenance, and others, are used to navigate the NYSIIS application. To perform a particular function in NYSIIS, 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 NYSIIS 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 NYSIIS 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 NYSIIS and features included in the releases. Release notes may be viewed in the same manner as Announcements.

Inventory Alerts
The inventory alerts section will appear on the NYSIIS home page under the Release Notes section.

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. This table is not currently active in NYSIIS.

The next table, “Active Inventory That is Going to Expire or Expired Lots with a Quantity”, lists vaccines that going to expire (within 30 days is the default setting) 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 Users and Organizations

In this chapter:
User Roles
Adding Users
Adding Multiple Users
Maintaining Users
Editing Organizations
The Manage Access function allows Administrative Users to add and update information on both users and their organization(s) to which the administrative user has access.

Standard Users are able to update only their own user information using the Manage My Account function. See Managing My Account, Chapter 7, of this manual for more information on this function.

User Roles
NYSIIS 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 NYSIIS are hierarchical as follows:

1. **Administrative User:** This is the main contact for NYSIIS within the health care organization. The administrative user is responsible for the maintenance of all organization specific information, including users and clinicians. The administrative user is authorized to set up and maintain the NYSIIS Inventory Module for their organization. They also can access all the functions of the Standard User role described below.

2. **Standard User:** This is the primary user of NYSIIS. The standard user adds, edits, and finds patients, manages immunizations information, and generates both patient specific and organizational level reports. Examples of organizational level reports in NYSIIS include: reminder/recall reports, Comprehensive Clinic Assessment Software Application (CoCASA) extracts, Ad Hoc reports and immunization benchmark reports.

3. **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 NYSIIS.

4. **School or Camp User:** This role has read only access to view students/campers in NYSIIS. For more information on School and Camp Users, refer to Chapter 12: School and Camp Access.

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 NYSIIS.

Note: Required fields have asterisks and display in blue text. For example, when entering information on the Add User screen, the user’s first and last name are required: thus they have an asterisk and are shown in blue. Input fields not shown in blue are optional, although we strongly recommend that email address be included in every NYSIIS user account.
Adding Users
The Administrative User can add both Administrative and Standard Users to their organization.

To add a user to NYSIIS, follow these steps:
1. Access the Manage Access/Account page by clicking the Manage Access/Account button at the top of the NYSIIS Home Page.
2. Click on Add User under the Manage Access section of the menu panel.
3. You must enter the user’s First Name, Last Name, Health Commerce ID, and Email.
4. Enter additional information if desired, such as the Street Address and work Telephone Number. If the user has an administrative user role, you will be required to enter his or her work address, Email, and Phone Number.
5. Press Save.
6. Once a user is successfully saved in the database, the following message will be displayed at the top of the Edit User screen:
   “User Added, please proceed to the Modify Access Tab. User does not have access until you do”
Note: Remember to type in the Health Commerce ID using lowercase letters followed by numbers. This field is case sensitive and must be in this format for the user to gain access to NYSIIS.
Modifying Access

After adding a user, you must complete the Modify Access screen to assign the user access to the appropriate organization. To give a user access, follow these steps:

1. At the Edit User screen, click the Modify Access tab.

2. Select the appropriate Organization for the user to access by selecting the name from the Organization drop down list.

3. Select the appropriate Role for the new user.

4. Press **Add** under Add Access to add the information entered for this user.

5. Press **Save** when you have finished entering access information for this user.

**Note:** If you give a user access to more than one organization, he or she will need to select a specific organization to access upon logging in.
Adding Multiple Users

Administrative users also have the option of adding multiple standard users at once for their organization. This is the quickest way to set-up standard user accounts. To add multiple standard users, follow these steps:

1. Access the Manage Access/Account page by clicking the **Manage Access/Account** button at the top of the NYSIIS Home Page.
2. Click on **Add Multiple Users** under the Manage Access section of the menu panel.
3. At the Add Multiple Users screen, select NYSIIS from Application drop down list and then select your organization’s name from the Organization drop down list. If you do not see your organization’s name in this field, please contact the NYSIIS Help Desk for assistance.
4. Next enter the last name, first name, Health Commerce ID, and role for the user.
5. Press **Add**
6. Follow Steps 3 and 4 for each additional user;
7. When finished saving the last user, click on the NYSIIS link under the Application section of the menu panel to return to the NYSIIS home page.

Maintaining Users

NYSIIS allows administrative users to edit user accounts for their organization(s). Administrative users must find the individual’s user account in NYSIIS prior to editing their account information.

Finding Users

To find a user account within your organization, follow these steps:

1. Access the Manage Access/Account page by clicking the **Manage Access/Account** button at the top of the NYSIIS Home page.
2. Click on **Edit User** under the **Manage Access** section of the menu panel.
3. At the **Edit User – Search** screen, select the user’s organization from the Organization drop down list. If you are associated to only one organization, NYSIIS will default to your organization’s name. If you are associated to multiple organizations, select the appropriate organization before moving on to Step 5.

4. Select the Status of the end user you are searching for in NYSIIS. The Status field will always default to Active. This means NYSIIS will only search and find active users for your organization. If you are searching for Disabled and Terminated user accounts, select the appropriate box before moving on to Step 6.

5. Enter the last and first name of the user for whom you are searching, or leave both fields blank to bring up a complete list of users associated to your organization.

6. Press **Find**

7. All names matching the search criteria will be listed under the Search Results portion of the screen. To display the Edit User screen for a specific user, click the user’s last name.

**Note:** If a user has not accessed NYSIIS for 90 days or more, NYSIIS will automatically inactivate that user. To search for a user who has been inactivated, be sure to check the “Disabled” box on the search screen; this will bring up both disabled and inactivated users. You may then change the user’s status to active on the Modify Access tab.

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**Editing Users**

The Edit User function allows you to change any previously entered information about a user, including their status (active, disabled or terminated). To edit user information, follow these steps:

1. After completing Steps 1-8 outlined above in Finding Users, click on the user’s last name to access their Edit User screen.

2. To change a user’s status, proceed to step 6 in this section.

3. Press **Save** when you are finished updating the user’s information.

4. Once a user is successfully saved in the database, “User Updated” will appear at the top of the Edit User screen.

5. To modify the access of the user, click the **Modify access** tab

6. To edit current access, check the Select box for the access to be edited. Press **Select**.

7. Update the user’s role and/or status for the selected access and press **Save**.

8. Once a user’s access is updated, “User Access Updated” will appear at the top of the Modify Access screen.
Editing Organizations

Administrative Users may also edit their organization information by following these steps:

1. Access the Manage Access/Account page by clicking the Manage Access/Account button at the top of the NYSIIS Home page.

2. Click on Edit Organization under the Manage Access section of the menu panel.

3. Select the organization you wish to edit by clicking on the underlined organization name. The organization with an asterisk before the name indicates the parent organization and will only display if the administrative user has access to it.

4. Enter the updated organization Name, County, Address, Contact, Email, Phone Number, and Delivery Information. The Org ID, Org Classification, Type, and Medicaid ID fields can only be updated by contacting the NYSIIS Helpdesk. The VFC Pin, Uses NYSIIS Inventory, Frequency, and Campaign fields can only be updated by contacting the NYS Vaccine Program.

5. Press Save. The message “Organization Updated” will display at the top of the screen. For additional information regarding Editing Organizational Information, please contact the NYSIIS Help Desk.

Note: If Delivery Information is changed within NYSIIS at any time the NYS Vaccine Program must be contacted and informed of any change.
Managing My Account

In this chapter:

Editing User Information
Managing My Account

New York State Immunization Information System

Editing My User Account

NYSIIS allows all users to manage their own user account information. To verify or edit your user account information go to the Edit My User Account screen located on the Manage Access/Account page. You can access this page from your NYSIIS home page by selecting the Manage Access/Account button on the header.

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 or last name in the appropriate fields. You may also enter or edit any additional fields as necessary. Be sure to provide a valid email address or business phone number.

3. Press **Save**. If changes were made, the message “User Updated” appears on the screen.

**Note:** The first and last name fields on the Edit User screen are required fields, which is why they show in blue. If you are an Administrative User, the Email, Street Address, and Phone Number fields are also required. You may edit these fields, but do not remove the information from them.
Maintenance

In this chapter:
- Managing Schools
- Managing Physicians
- Managing Clinicians
- Managing Temp Log Units
- Managing Fees
The Maintenance section on the menu panel allows NYSIIS Administrative Users to add and update information on schools, physicians, and clinicians.

**Managing Schools**

NYSIIS 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 NYSIIS Home page, click on “Manage Schools” under the “Maintenance section” of the menu panel.

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. Input fields not shown in blue are optional.
Editing School Information

1. On the NYSIIS 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 button, to return to the Manage Schools screen.

Deleting Schools

1. On the NYSIIS 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. NYSIIS 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.

<table>
<thead>
<tr>
<th>Select a School to Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Name</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>School Listing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>George School</td>
</tr>
<tr>
<td>SUNNYDAY DAYCARE</td>
</tr>
</tbody>
</table>
Managing Physicians

Physicians are considered Primary Care Providers (PCP) in NYSIIS. 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 NYSIIS Home page, click on Manage Physicians under the Maintenance section of the menu panel.
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, associated to the patient, not to a vaccination. Provider-PCP may be used for filtering when running a Reminder/Recall report.
Editing Physician Information

1. On the NYSIIS 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.

<table>
<thead>
<tr>
<th>Select a Physician to Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a Physician</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Physician Listing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>---------</td>
</tr>
<tr>
<td>Edith, Doc</td>
</tr>
<tr>
<td>Donna, Son</td>
</tr>
</tbody>
</table>

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 the List All to return to the Manage Physicians screen.

Note: When adding Physicians and Clinicians into NYSIIS, this does not create a NYSIIS User Account for them. Please refer to Chapter 6 Managing Users and Organizations, for instructions on adding users into NYSIIS.

Deleting Physicians

1. On the NYSIIS 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 may be associated with one or more clinic sites. Examples of clinicians are physicians, physician assistants, and nurses. NYSIIS Administrative Users will use the Manage Clinicians function to enter new, and update existing clinicians within the organization. Clinicians added to NYSIIS through this function will be available from drop down lists used for recording immunizations.

Adding Clinicians

1. On the NYSIIS Home page, click on Manage Clinicians under the Maintenance section of the menu panel.
2. Press Add Clinician.
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 at the bottom of the screen, highlight a site with which the clinician will be associated and press Add. Do this for each site at which the clinician may practice. If the clinician is associated with all the sites in the Complete Site Listing, press Add All.

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 NYSIIS 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. 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. 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 NYSIIS, creating duplicate records. To eliminate extraneous records using NYSIIS merge clinician feature, follow these steps:

1. On the NYSIIS 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 NYSIIS 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. NYSIIS will return you to the Manage Clinicians screen.

**Listing All Clinicians**

1. On the NYSIIS 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.

**Managing Temp Log Units**

Each organization, clinic, lab, or office will use refrigerator and/or freezer type units as part of their cold storage program. This function allows an authorized user to Add or Edit their Refrigerator or Freezer units to support temperature monitoring.

**Adding New Units**

1. On the NYSIIS Home page, click on **Manage Temp Log** under the Maintenance section of the menu panel. The Temp Log Management screen will display.
2. Press the **Add Unit** button.
3. The Add/Edit Refrigerator or Freezer Screen will display.

4. Enter appliance name in the Unit Name field
5. Select appliance type – Refrigerator or Freezer
6. Ensure that the Active button is selected. This is the default when new units are added.
7. Select the temperature scale for the unit – Fahrenheit or Celsius
8. Press **Save** to add new appliance unit to existing appliance list.

**Editing an Existing Unit**

1. On the NYSIIS Home page, click on **Manage Temp Log** under the Maintenance section of the menu panel. The Temp Log Management screen will display.
2. Select the **Unit Name hyperlink** under the ‘Select a Refrigerator/Freezer to Edit’ column
3. Add/Edit Refrigerator or Freezer screen will display.
4. Edit appropriate field(s):
   - Unit Name
   - Appliance Type: (Refrigerator or Freezer)
   - Appliance Status: (Active or Inactive)
   - Temperature scale (Fahrenheit or Celsius)
5. Press **Save** to save changes made to existing unit.
6. Press **Cancel** to return to the Temp Log Management screen without saving changes.

**Removing an Existing Unit**

An existing refrigerator or freezer unit cannot be removed (deleted) due its association with historical temperature log recording data. If the appliance is being retired, sold, or moved to another location the user must:

1. Follow the steps to Editing an Existing Unit
2. Select the **Inactive** button as the Appliance Status
3. Press **Save** to save changes made to existing unit

The unit will still remain on the Temp Log Management list with an Active Status of ‘No.’

**Managing Fees**

There are two types of fees, Vaccine and Administration. Each provider Organization can set up and manage their own fees for Vaccines and Administration costs. The Manage Fees section is available only to Organizations that request access and are setup for fees management. Fees set up in the Manage Fees section of the application, will be assignable per immunization, through dropdown lists in the add and edit immunization portions of application.

**Adding a New Fee**

1. On the NYSIIS Home page, click on **Manage Fees** under the Maintenance section of the menu panel.
2. Press the Add Fee hyperlink.
3. On the Add New fee screen, choose Fee Type - Administration or Vaccine.
   a. Administration Fee
      • Type Fee Name
      • Type Description, if applicable
      • Enter Amount
      • Press Save
   b. Vaccine Fee
      • Choose Trade Name from dropdown list
      • Type Description, if applicable
      • Enter Amount
      • Press Save

4. Once saved, **Fee Saved** will appear on the Manage Fees screen and the newly added Fee will appear under the appropriate fee type. Each fee can be edited after entry by clicking the Trade Name or Fee Name links.
**Editing an Existing Fee**

1. On the NYSIIS Home page, click on **Manage Fees** under the Maintenance section of the menu panel. The Manage Fees screen will display.
2. Select the Fee **Name hyperlink** under the Trade Name or Fee Name column.
3. The Edit Fee screen will display:

   ![Edit Fee Screen]

   

By editing a fee you will also change all of the immunization records associated with it. If you need to change a Fee Amount, please mark the fee as Inactive and create a new fee for the new amount.

4. Edit appropriate field(s):
   - Trade Name or Fee Name
   - Description
   - Amount
   - Fee Active (Yes or No)

5. Press **Save** to save changes made to existing fee.
6. Press **Cancel** to return to the Manage Fees screen without saving changes.

**Removing an Existing Fee**

An existing fee cannot be removed (deleted) due its association with historical immunization data. If the fee amount is being changed or the fee is no longer going to be used, it is recommended that the fee be Inactivated:

1. Follow the steps to select a fee to edit.
2. In the Fee Active field, select the **No** button.
3. Enter an Inactive Reason.
4. Press **Save** to save changes made to existing fee.

5. Press **Cancel** to return to the Manage Fees screen without saving changes.

The fee will still remain on the Manage Fees screen with an Active Status of ‘No.’
Managing Inventory

In this chapter:

- Adding New Inventory
- Viewing Inventory
- Updating Inventory
- Inventory Alerts
- Viewing Inventory Transactions
- Doses Administered Report
- Transaction Summary Report
- Vaccine Ordering
- Viewing Orders
- Accepting Transfers
- Recording Temp Log Readings
The Inventory Module in NYSIIS is designed to be a complete tracking system for a provider’s vaccine inventory. Administrative Users of NYSIIS have the ability to set up the inventory module for their organization and regularly view, add, or update any vaccine lots in an organization’s inventory.

**Adding New Inventory**

Use the Add Inventory function only if you are adding vaccines with a *new* lot number. If you are adding vaccine to a lot number that already exists in your inventory, refer to [Updating Inventory](#).

1. Click on **Manage Inventory** under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press **Show Inventory**.
3. Press **Add Inventory**.
4. At the Add Vaccine Inventory Information screen, do the following:

   ![Add Vaccine Inventory Information](image)

   - 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.
   - Select Funding Type (Public or Private) from the drop down pick list.
   - Choose the NDC number from the drop down list provided. The NDC options displayed are based on the Trade Name and Funding Types selected. Once an NDC number is chosen, the packaging description for that vaccine will populate below the selection. If your lot has a funding type of Public and the NDC number needed is not present, choose “Not Listed”, then proceed to complete the vaccine information. **Note:** If your lot has a funding type of Private and the NDC number needed is not listed, please contact the Vaccine Program.
   - Enter Lot Number
   - Enter the vaccine lot’s expiration date. Fill in the field using the mm/dd/yy format or use the pop-up calendar by clicking the calendar icon to the right of the field. If no day is specified on the vaccine, enter the last day of the month.
   - 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.
• Enter the number of vaccine doses received in the Doses on Hand text box.
• Enter the cost per dose of the vaccine, if desired, in the Cost Per Dose Field.

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 add additional vaccines, press **Add New** and repeat Steps 4-6.

8. To return to the Show Inventory screen, press **Cancel**.

**Viewing Inventory**

To view your organization’s vaccine inventory in NYSIIS, follow these steps:

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

2. Press **Show Inventory**.

3. The inventory table shown by default will include vaccines within your organization’s NYSIIS Inventory Module. This list will include non-expired active and inactive vaccines. The following is a description of all options available:

   • **Active**: Select the 'Active' option to view only those vaccine lots that have valid (non-expired) doses remaining in the inventory module.
   • **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.
   • **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.

**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 number 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.

Vaccines on the View Inventory screen that are highlighted in pink will expire within 30 days.
The following is an explanation of the columns in the inventory table:

<table>
<thead>
<tr>
<th>Trade Name</th>
<th>Lot Number</th>
<th>Inv On Hand</th>
<th>Active</th>
<th>Public</th>
<th>Exp Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enferix Peds</td>
<td>76865434</td>
<td>38</td>
<td>Y</td>
<td>Y</td>
<td>04/01/2015</td>
</tr>
<tr>
<td>PDL</td>
<td>87u02435</td>
<td>25</td>
<td>Y</td>
<td>N</td>
<td>01/01/2012</td>
</tr>
<tr>
<td>PDL</td>
<td>3668888</td>
<td>26</td>
<td>Y</td>
<td>Y</td>
<td>01/01/2012</td>
</tr>
<tr>
<td>PDL</td>
<td>11111111</td>
<td>45</td>
<td>Y</td>
<td>Y</td>
<td>01/01/2012</td>
</tr>
<tr>
<td>MUR II</td>
<td>a455679</td>
<td>64</td>
<td>Y</td>
<td>Y</td>
<td>02/01/2011</td>
</tr>
<tr>
<td>MUR II</td>
<td>86666666</td>
<td>50</td>
<td>Y</td>
<td>Y</td>
<td>05/01/2011</td>
</tr>
<tr>
<td>MUR II</td>
<td>88866</td>
<td>60</td>
<td>Y</td>
<td>N</td>
<td>07/01/2012</td>
</tr>
<tr>
<td>Prevnar</td>
<td>w4e67860</td>
<td>23</td>
<td>Y</td>
<td>Y</td>
<td>01/01/2015</td>
</tr>
<tr>
<td>Varivax</td>
<td>a347-850</td>
<td>33</td>
<td>Y</td>
<td>Y</td>
<td>03/02/2012</td>
</tr>
</tbody>
</table>

**Select:** A mark in this checkbox allows you to modify the quantity of the selected vaccine.

**Trade Name:** This column lists the vaccine’s trade name.

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

**Inv On Hand:** This column lists the number of doses remaining 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.

**Public:** A “Y” in this column indicates the vaccine was supplied by the Vaccine Program. An “N” indicates that the vaccine is private stock purchased by the organization.

**Exp Date:** This column gives the vaccine’s expiration date. Vaccines that will expire in 30 days or less are highlighted in pink.

### Updating Inventory

To change information on existing vaccine lots, follow these steps:

1. Click on **Manage Inventory** under the Inventory section of the menu panel.
2. Press **Show Inventory**.
3. The inventory table shown by default will include active vaccine lots within the organization.
4. Select the vaccine lot you wish to update by clicking on the vaccine’s trade name hyperlink, which is underlined and in blue.
5. On the next screen, make desired changes to any of the fields. Any changes made to a vaccine after a dose has been administered will be updated in the patient’s record.
6. To modify the quantity of doses on hand, follow steps 1-4 above. Enter the following information:
• Under Action, choose whether you would like to add to or subtract from the inventory on hand.
• Under Amount, enter the quantity of inventory to be added or subtracted.
• Choose a reason for changing the quantity of the vaccine lot by selecting from the Reason drop down list. See below:

![Edit Vaccine Inventory Information](image)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receipt of inventory</td>
<td>Use this reason when you are adding new inventory to a particular lot.</td>
</tr>
<tr>
<td>Adults not in NYSIIS</td>
<td>Use this reason when subtracting inventory for immunizations received by patients 19+ who have not signed a consent to release information form.</td>
</tr>
<tr>
<td>Error correction</td>
<td>Use this reason when adding to or subtracting from inventory doses that were incorrectly entered or when getting extra or fewer doses from a vial.</td>
</tr>
<tr>
<td>Doses returned</td>
<td>Use this reason when adding inventory to a particular lot because vaccines were returned from another site associated with your organization.</td>
</tr>
<tr>
<td>Doses transferred</td>
<td>Use this reason when subtracting inventory that has been transferred to another site associated with your organization.</td>
</tr>
<tr>
<td>Spoilage reported by Provider:</td>
<td>Use this reason when doses should be subtracted as a result of broken vials, faulty injections, improper refrigeration, or public doses returned to the New York State Department of Health.</td>
</tr>
<tr>
<td>Expired</td>
<td>Vaccine Lot expiration date has passed.</td>
</tr>
</tbody>
</table>
Lost or Damaged in transit to Provider: Vaccine Lot was all or partly damaged or lost during shipment.

Failure to store properly by Provider: Vaccines were stored in a non-authorized and/or unsecured storage unit.

Refrigerator failure reported by Provider: A Out of Range temperature reading was logged for Refrigerator/Freezer storage unit

Doses Recalled: Doses recalled by State or Federal agencies.

Vaccine Admin Equipment Failure: Other equipment failure than cold storage that impacted inventory.

Shortened Expiration Date: Expiration Date shortened due to issues other than storage.

Payback VFC Vaccine with private vaccine: Private funded vaccines added to VFC inventory and then replaced.

Payback private vaccine with VFC vaccine: VFC funded vaccines added to Private funded inventory and then replaced.

Lost or unaccounted for in Providers inventory: Adjustment to inventory due to unknown reasons.

7. Press Save.

8. Once your updates are saved in NYSIIS, the message “Inventory was updated successfully” will appear at the bottom of the screen.

9. Press Cancel to return to the Show Inventory screen.

Modifying Quantities of Multiple Vaccines

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

1. Follow Steps 1-3 under Updating Inventory.

2. Check the box or boxes under the Select column next to the vaccine lots whose quantities you want to modify.

3. Press Modify Quantity.

4. On the Modify Doses on Hand screen, enter the following information:
   - Under Action, choose whether you would like to add to or subtract from the inventory on hand.
   - Under Amount, enter the quantity of inventory to be added or subtracted.
   - Choose an explanation for changing the quantity of the vaccine lot by selecting from the Reason drop down list. Refer to the list above for a description of the reasons for adding or subtracting inventory.
5. Press **Save**.

### Inventory Alerts
Inventory alerts inform users of the status of their organization’s vaccine inventory. These lists are displayed on the NYSIIS homepage. Alerts will display for vaccine lots that are going to expire, and vaccine lots with low quantities. These alerts are generated by a system default setting, and these alerts can be customized.

Inventory alerts can also be viewed on the Inventory Alerts screen. Select Manage Inventory, located under the Inventory heading on the menu panel. The first table under Inventory Alerts entitled, Vaccine Order/Transfer Notification, is not active in the NYSIIS application. The next table entitled, Active Inventory That is Going to Expire or Expired Lots with a Quantity, displays a list of vaccines in the Inventory that will expire within a set amount of days (30 days is the default), as well as vaccines that have expired but still have quantity in inventory. The last two tables at the bottom of the screen display inventory that is running low by either vaccine group and trade name (the default low level alerts is 5 doses).

### 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 AlertPrefs**.
3. In the Inventory Expiration Alerts section, the system default is 30 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.
For all Low-Level Alerts, the system default is 5 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.

4. 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 inventory. (Public vaccines are received from the Vaccine Program and private vaccines are purchased by your organization).
2. Press Save.
Trade Name:
1. Under Update Low-Level Alerts by Vaccine Group, click on the underlined vaccine group to display the trade names.
2. Enter the number of doses that will indicate the inventory is running low for the trade names listed. You may enter a specific number of doses for private and public stock separately or you can enter one combined number for doses of both private and public inventory.
3. Press Save.

Notes: To restore all inventory alerts to NYSIIS system defaults, press Reset to Default. Press OK To return to the Manage Inventory screen, press Cancel.

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 Show Inventory.
3. Click anywhere on the page.
4. Do one of the following:
   • Choose File, then Print, from your browser's menu bar. In the Print dialog box, press OK.
   • Or press the printer icon on your browser's toolbar.
5. If your printout is cut off, try setting your printer to landscape. To do this:
   • Choose File, then Print, from your browser's menu bar.
   • In the Print dialog box, press Properties.
   • In the Properties box, find the section where you may specify orientation. Choose landscape.
   • Press OK.
   • Press OK in the Print dialog box.
Viewing Inventory Transactions

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. Read below to learn about running an inventory transaction report.

1. Click on Manage Inventory under the Inventory section of the menu panel.
2. Press Show Transactions.
3. At the Show Transactions screen, do the following:
   - Enter the “From” and “To” dates for when the immunizations were entered in NYSIIS.
   - Or, enter the “From” and “To” dates for when the immunizations were given to the patient(s).
   - Choose a specific user name or All User Names from the User Name drop-down list.
   - Choose a specific transaction type or All Transaction Types. These transactions relate to the Reason drop-down list on the Edit Vaccine Inventory Information screen.
   - Select the inventory site whose transactions you wish to view or choose All Sites with Inventory.
   - Choose the trade name, lot number, public/private, and site from the Trade Name/Lot Number drop-down list or choose All Lot Numbers from the list.
   - Enter the quantity of records you wish to view in the Display Last <#> Records field.
4. Press VIEW.
5. The Vaccine Transactions screen will then display.

Table 2: Transaction types

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receipt of Inventory (REC):</td>
<td>This type indicates vaccines were added as new inventory.</td>
</tr>
<tr>
<td>Doses Given to Adults not in NYSIIS (Adult Imms):</td>
<td>This type indicates vaccines were subtracted from inventory because immunizations were given to adult patients that did not give signed consent.</td>
</tr>
<tr>
<td>Immunization Given (Immunize):</td>
<td>This type indicates vaccines were subtracted from inventory because of immunizations given.</td>
</tr>
<tr>
<td>Immunization Deleted (Delete):</td>
<td>This type indicates vaccines were added to inventory because they were deleted from a patient's record.</td>
</tr>
<tr>
<td>Doses Transferred (TRA):</td>
<td>This type indicates vaccines were subtracted due to transfer to another site associated with your organization.</td>
</tr>
<tr>
<td>Doses Wasted (WAS):</td>
<td>This type indicates vaccines were subtracted from inventory because they were wasted through faulty injections, broken vials, improper refrigeration, or public doses returned to the New York State Department of Health.</td>
</tr>
<tr>
<td>Doses Returned (RET):</td>
<td>This type indicates vaccines were added to inventory after being returned from another site associated with your organization.</td>
</tr>
<tr>
<td>Error Correction (ERR):</td>
<td>This type indicates vaccines were added or subtracted to correct a previous error or after getting extra or fewer doses from a vial.</td>
</tr>
</tbody>
</table>
**Doses Reconstituted (RECON):**

This type indicates that a number of doses were subtracted from an un-reconstituted lot to form a new reconstituted lot.

**Table 3: Vaccine transactions**

The top chart on the Vaccine Transactions screen gives the following information:

<table>
<thead>
<tr>
<th>Site Name:</th>
<th>Vaccines in the table are first sorted alphabetically by your organization name.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trans Date:</td>
<td>Vaccines are next sorted numerically by transaction date; the most recent transactions are shown first.</td>
</tr>
<tr>
<td>Lot/Trade Name:</td>
<td>The lot number and trade name of the vaccine are listed in this column.</td>
</tr>
<tr>
<td>Type:</td>
<td>Refer to Table 2 in this chapter for an explanation of the transaction codes shown in this column.</td>
</tr>
<tr>
<td>Qty:</td>
<td>The number in this column indicates the quantity added to or subtracted from inventory due to the listed transaction type.</td>
</tr>
<tr>
<td>Patient Name:</td>
<td>The patient name column indicates the patient associated with the transaction, if applicable.</td>
</tr>
<tr>
<td>DOB:</td>
<td>The date of birth of the patient is indicated in this column, if applicable.</td>
</tr>
</tbody>
</table>

**Table 4: Transaction Totals**

The chart at the bottom of the Vaccine Transactions screen gives a breakdown of transactions by transaction type.

<table>
<thead>
<tr>
<th>Trans Code:</th>
<th>This column displays the abbreviated code that identifies the transaction type.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trans Description:</td>
<td>This column displays the full transaction type.</td>
</tr>
<tr>
<td>Trans Count:</td>
<td>This column represents the number of times a particular transaction type was performed within the dates you specified. For example, if your organization received two lots of vaccines within the one-week period for time you specified, the Trans Count would show “2” in the Receipt of Inventory row.</td>
</tr>
<tr>
<td>Trans Value:</td>
<td>This column shows the quantity of doses added or subtracted by transaction type. For example, if you received a combined 103 doses in the two vaccine lots you added to inventory, “103” would show in the Trans Values column on the Receipt of Inventory row.</td>
</tr>
</tbody>
</table>
Printing Inventory Transactions
To print out a list of vaccine transactions, follow these steps:

1. Follow Steps 1 - 4 under Viewing Inventory Transactions.
2. Click anywhere on the page.
3. Do one of the following:
   • Choose File, then 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 File, then Print, from your browser's menu bar.
   • In the Print dialog box, press Properties.
   • In the Properties box, find the section where you may specify orientation. Choose landscape.
   • Press OK.
   • Press OK in the Print dialog box.

Doses Administered Report
The Doses Administered Report will give you information on how many doses of each vaccine have been given, by age, within a specified date range. For NYSIIS, this report includes immunization records from Public and Private lots, and from both NYSIIS Inventory and Other Inventory. Note: This report is not the VFC Doses Administered Report – that report can be found under Reports on the left side menu panel by clicking “VFC Report”.

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.
6. Press Refresh after a few moments to check the status of your report.
7. Click on the name of your report once it is underlined and displays in blue text.
8. The report displays in Adobe Reader®.
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.
Transaction Summary Report

The Transaction Summary Report will give you information on how many doses of each vaccine have been given within a specified date range. The report also gives information on how many doses were expired, transferred, received, restocked, wasted, or given in error.

To generate a transaction summary report for your organization, follow these steps:
1. Click on Transaction Summary under the inventory section of the menu panel.
2. At the Transaction Summary Report Criteria screen, choose a site from the drop down list or choose All Sites Combined
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.
6. The report displays in Adobe Reader®
7. To print the report, press the printer icon on the Adobe® toolbar.
8. Press OK in the Print Dialog box.
9. To return to the Transaction Summary screen, press the BACK button on your browser.
Vaccine Ordering

If your organization is a Vaccines for Children (VFC) provider, you may order state-supplied vaccine. Once your organization has been trained and approved to order through NYSIIS, you can place vaccine orders using the following procedure.

To create a vaccine order in NYSIIS:

1. Click **Manage Orders** link under the Inventory menu group on the menu panel.
2. Click the **Create Order** button.
3. Create Order screen displays. Shown below is the Create Order screen for an organization that uses their NYSIIS inventory module:

   ![Create Order Screen](image)

4. Check the Inventory Verified Box. If your organization does not use the NYSIIS inventory module, your screen will also include an “Additional Inventory” section (shown below). Use the Additional Inventory section to record all of your publicly-funded vaccine.
5. Under the Doses Ordered column, enter the number of doses needed for each Vaccine. The Orderable Vaccines section is separated by Pediatric and Adult intentions. Some vaccines may be listed under both intention sections. Ensure that you order the correct number of doses for each separate Pediatric or Adult intention. For example, if you estimate that you will administer 50 Flu-Mist vaccines to Pediatric patients, and 30 Flu-Mist vaccines to Adult patients, you would enter “50” in the Doses Ordered column for Flu-Mist under the Pediatric section, and “30” in the Doses Ordered column for Flu-Mist under the Adult section.

6. Click the **Save & Submit** button to submit order or select another button based on desired action.

<table>
<thead>
<tr>
<th>Create Order Buttons</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>Order is saved but not submitted</td>
</tr>
<tr>
<td>Save &amp; Submit</td>
<td>Order is submitted for review and approval</td>
</tr>
<tr>
<td>Cancel Order</td>
<td>Order is canceled</td>
</tr>
<tr>
<td>Exit Page</td>
<td>Navigates back to Manage Orders screen and unsaved data is lost.</td>
</tr>
<tr>
<td>Current Inventory</td>
<td>Displays Organization's current, public inventory in NYSIIS</td>
</tr>
</tbody>
</table>
7. Once order is submitted, the Order Confirmation page will display the following message popup window, “This action will submit your order to the Immunization Program for approval. Once confirmed, the order cannot be modified. Press OK to confirm or Cancel to return to the order.”

8. Click the OK button to submit the order for review and approval by the Vaccine Program organization.

Notes: The Orderable Vaccines section includes a Recommended Order Qty column. This field displays a recommended quantity based on a preset calculation: (Doses Administered – Doses on Hand) + (50% of Doses Administered) = Recommended Order Quantity. This calculation is only used as a guide to determine an estimate of vaccine needed. You may choose to order more or less than the recommended quantity based on your experience and knowledge of vaccine needs for your practice.

Viewing Vaccine Orders

Along with the ability to create an order, the Manage Orders screen displays previously submitted orders. Each order displayed on this screen will also display the User who placed the order, the Submit Date, order Status, and Order #. Orders are displayed as Current, Historical, or Both.

Current Orders

By selecting the Current radio button, you will be able to view all new, saved, and in-progress orders. These orders will show a status of one of the following:

<table>
<thead>
<tr>
<th>Current Order Statuses</th>
<th>Status Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saved</td>
<td>The order has been created by the provider and has been saved but not yet submitted. The order will not yet appear in the order list for the NYS Vaccine Program organization. The order can still be canceled by the ordering provider organization. If not submitted, saved orders will automatically be canceled 30 days after the create date.</td>
</tr>
<tr>
<td>Pending</td>
<td>The order has been submitted by the provider organization and will now be visible to the Vaccine Program organization. The order has not yet been viewed by the State and can still be canceled by the ordering provider organization.</td>
</tr>
<tr>
<td>In Progress</td>
<td>The order has been received by the Vaccine Program organization. At this point the order can no longer be canceled by the provider organization. The Vaccine Program can approve or deny all or part of the order.</td>
</tr>
<tr>
<td>Tentative-Approved</td>
<td>The order has been fully reviewed by the Vaccine Program with at least one order item is approved and is ready for final review. This order can still be modified by the Vaccine Program</td>
</tr>
<tr>
<td>Tentative-Denied</td>
<td>The entire order has been denied by the Vaccine Program and is now ready for final review. The order can still be modified by the Vaccine Program</td>
</tr>
</tbody>
</table>
Final-Approved
The order has been reviewed and finalized by the Vaccine Program. The status indicates that the order is ready to be included on a VTrckS export file and at this point the order can no longer be modified.

Sent to CDC
All or part of an order has been approved and successfully exported from NYSIIS into VTrckS for order fulfillment.

Shipped
All or part of an order has been shipped, the order data has been imported into NYSIIS, and a new Transfer is created with the line items.

Backorder
One or more line items on the order has been backordered

Historical Orders
By selecting the Historical radio button, you will be able to view all complete orders from the last 30 days. You may also enter a date range to view other completed orders. Historical orders will show a status of one of the following:

<table>
<thead>
<tr>
<th>Historical Order Statuses</th>
<th>Status Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canceled</td>
<td>The order was canceled by the ordering organization. This action cancels the entire order and can only be done when the order is in a Saved or Pending status. Once canceled, it can no longer be submitted to the Vaccine Program for review.</td>
</tr>
<tr>
<td>Final-Denied</td>
<td>The order has been reviewed and denied by the Vaccine Program.</td>
</tr>
<tr>
<td>Accepted</td>
<td>All of the Line Items on an order have been shipped and accepted into the provider's inventory.</td>
</tr>
</tbody>
</table>

Viewing Order Details

1. From the Manage Orders screen, select the radio button to be display the type of orders to display - Options are Current, Historical, or Both. Orders will display all current orders as the default.

2. Under the Order list section, click on the order Status hyperlink to view a specific order.

3. The View Order screen will be displayed.
Accepting Transfers

After your order has shipped from the fulfillment center, the shipment (also known as a transfer) will be created in NYSIIS. You can accept this transfer, which will add the vaccine stock to your NYSIIS inventory. This is done through the Manage Transfer screen.

To Accept a Transfer in NYSIIS:

When your order has been shipped, your Home screen will display a “Shipped” notification under the Vaccine Order/Transfer notification section. In order to get the new vaccine to populate into your inventory, you will need to “Accept” the transfer of new inventory.

1. Select the **Manage Transfers** link under the Inventory Menu Group on the menu panel.
2. From the Manage Transfer screen, review the list of Inbound Transfers. Orders that have shipped items will have a date displayed under the Ship Date column. If the Ship Date field is blank the order has not shipped yet.
3. Under the Inbound Transfer section, click on the Transfer ID number hyperlink to be taken to that transfer.
4. The Receive Transfer screen will be displayed.

5. Select the Accept Transfer button to accept the transfer.

6. Popup window displays with a message asking “Are you sure you want to add all transfer items into inventory?”

7. Click OK to add items into inventory or Cancel to go back to the view the transfer screen again.

**Notes:** Your Transfer may display in NYSIIS before your shipment has actually arrived – but you should not “Accept” the transfer of vaccine into your inventory until you have actually received the vaccines. To view order and shipment tracking details, click on the Ship Info hyperlink under the Ship Info column.
Temperature Log Recording

Effective January 1st, 2015, the New York State Department of Health (NYSDOH) Vaccine Program will require providers enrolled in the VFC Program to use the NYSIIS Temperature Log (Temp Log) to record twice daily temperatures for their storage units (refrigerators and freezers) containing VFC vaccines. Reporting storage unit temperatures that hold “private” vaccine is not required. Temperature monitoring of publicly purchased vaccine for other programs, e.g., STD clinic or Hepatitis B Program, may continue to be recorded on paper Temp Logs if those vaccines are kept in a storage unit that does not contain VFC vaccine. Temperature readings need to be taken at the start and at the end of each clinic day, and recorded in NYSIIS along with the date, time of the temperature reading and the name of user who entered the information. Temperatures need to be recorded manually twice daily regardless of whether there is a temperature alarm, a chart recorder thermometer, or a digital data logger.

To Record a Temperature reading in NYSIIS:

1. Click on **Record Temp Log** under the Inventory section of the menu panel. The Temp Log screen displays.

2. Select the appropriate refrigerator or freezer from the Unit dropdown list.

3. By default, the log will display the past 7 days. To view a different date range, change it by typing a new date in the Date field or by using the calendar icon and then click. The and buttons can also be used to navigate to a different date.

4. To record a temperature type (Current, Min and Max), first select the time of reading from the “AM” or “PM” dropdown list, next to the appropriate date. For days that your office was closed, click both “Office Closed” checkboxes

Definitions of temperature types:

**Current (required):** The current temperature of the cooler unit
**Min (optional):** The coldest the cooler unit has been since the minimum/maximum thermometer was reset.

**Max (optional):** The warmest the cooler unit has been since the minimum/maximum thermometer was reset.

5. Select the temperature type from the “In-Range” dropdown list. If the refrigerator or freezer’s temperature is not on the dropdown list, select the “Out of Range” option.

   a. **Note:** If your temperature reading is Out of Range, you must manually enter the temperature in the Out of Range field that appears below the “In Range” dropdown list and enter an explanation into the Comment field.

6. Click **Save** to save temperature recording(s).

**Edit Existing Temperature Reading**

1. Repeat steps 1-3 from **Record a Temperature Reading**.
2. Make necessary changes to editable fields.
3. Click **Save** to save your changes.

---

**Notes:** Ensure that you enter your Temperature recordings into NYSIIS promptly. Temperature Readings recorded more than 2 days before the current date can **only** be edited by Authorized users. All other users have up to 2 days to make corrections to their temperature records. Temperature recordings cannot be entered for dates earlier than 33 days before the current date.
Managing Patients

In this chapter:

Finding Patients
Use of Dropdown Lists in NYSIIS
Editing/Entering Patient Information
Saving Patient Information
Deduplication of Patients
Patient Consent
Countermeasure and Response Administration (CRA) Module
Because NYSIIS receives immunization information from multiple provider sources, including birth record downloads, you should always attempt to find a patient in NYSIIS before entering them as a new patient. However, NYSIIS will attempt to deduplicate (compare entered information against information saved to the system for duplicate patients) patient records prior to saving the information on the Enter New Patient screen.

Finding Patients
As mentioned above, it is extremely important that you always search for a patient in NYSIIS 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 NYSIIS. Remember, when searching for patients in NYSIIS, you are searching on a statewide level and not just within your organization. With this in mind, when searching for an existing patient in NYSIIS, 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 NYSIIS Search Criteria” later in this chapter.

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

![Patient Search Criteria](image)

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.
Entering Names
On all first and last names entered into NYSIIS for patient searches, NYSIIS 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:** 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 NYSIIS. 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 ID only will produce a single name match, if the patient ID is unique to the organization. To find a patient using this method, the Patient ID must have been entered previously in the patient record.

3. Press **Find**.
4. 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.
5. If only one patient matches your search, NYSIIS will bring you directly to that patient’s demographic screen in NYSIIS.

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 NYSIIS, proceed to “Entering A New Patient.”

7. If multiple records are found matching the criteria you entered, and there are over 75 matches, NYSIIS will give a warning that there are too many patients matching your search criteria. Please refine your search criteria to limit your patient list.

Finding Patients with no First Name

To search for a patient with no first name, you may:

• Search using only the last name with no other fields filled. Enter the full last name to return patients whose last name matches what is entered and who do not have a first name.

• Search using the last name and enter “No First Name” in the first name field. You may narrow the search of patients with no first name by entering other criteria, such as middle name, gender or birth date, etc.

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 Demographic screen, while the Manage Immunizations query will display the patient’s Immunization History screen.

Examples of NYSIIS Search Criteria

It is recommended that users utilize the “3-2” search when attempting to find patients in NYSIIS. 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 First Name and DOB
Patient DOB and Gender
Patient ID
Patient DOB

It is recommended that additional criteria are used when searching for patients with common names. This will help narrow the list of possible matches in NYSIIS.
Use of Dropdown Lists in NYSIIS

When entering information on new patients or editing patient information, you will use dropdown lists for many fields. NYSIIS uses dropdown 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 dropdown lists over free text fields include:

- **Ease of use.** Dropdown 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 dropdown lists NYSIIS stays in HL7 compliance.
- **Uniformity of entered data.** By choosing information from a dropdown list, users do not risk entering conflicting information that could decrease the accuracy of NYSIIS 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 dropdown lists, NYSIIS 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 NYSIIS. The Enter New Patient screen, accessed by clicking this option on the menu panel, allows you to input information for a new patient into NYSIIS. The demographic and Enter New Patient screens are divided into the following sections: Personal Information, Patient Information, Address Information, Responsible Persons, Patient Comments, and Patient Notes.

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**Note:** Organizations participating in a pandemic exercise or event will utilize the CRA Event Information module located directly beneath the Patient Information section of the demographic screen.
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 dropdown lists at the top and choose a day by clicking on the appropriate calendar day. Press OK.

   Children entered by the New York Vital Records program do not have editable birth dates. The parent/guardian must contact the New York Vital Records program in the event an incorrect birth date is in dispute. Contact the NYSIIS Help Desk to obtain the Vital Records phone number.

6. Mother's Maiden Last Name: This is a required field. NYSIIS will allow you to save the record without this field completed; however, it will request you gather this information for future deduplication of patients.
7. Mother's First Name: This is a required field. NYSIIS 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.
8. **Gender**: This is a required field. Select the appropriate option from the dropdown list to choose male or female.

9. **Medicaid ID**: This is an optional field. Medicaid ID of the patient.

10. **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).

11. **Birth Country**: This field defaults to “United States.” Use the dropdown list to select a different country of birth, if applicable.

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

13. **Patient Consents to Share Immunization Data**: This field indicates written consent has been obtained for a patient 19 years of age or older.

**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. A patient may have numerous patient IDs associated with him or her; each ID is organization dependent.

2. **Ethnicity**: Choose the patient’s ethnic background from the dropdown list provided.

3. **Race**: Choose the patient’s race from the dropdown list provided.

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

5. **School**: Fill in the patient’s school from the dropdown list, if provided. This information is used only for reporting and must be set up by the organization’s NYSIIS administrative user. For instructions on how to set up the School field, refer to “Managing Schools” in Chapter 8.
6. **Tracking Schedule:** This required field defaults to the Advisory Committee on Immunization Practices (ACIP) schedule.

7. **Status:** Choose Active from the dropdown list if you want this patient to be associated with your organization, meaning he or she is receiving services from you. When you specify a patient as Inactive, you make him or her inactive for your organization only.

   This information affects recall and reminder notices and Comprehensive Clinic Assessment Software Application (CoCASA) and Health Plan Employer Data and Information Set (HEDIS) reporting. Choosing Permanently Inactive — Deceased and adding a date of death will inactivate the patient for all organizations using NYSIIS. Choose this option only if you know the patient to be deceased.

   **Note:** The Status field can no longer be edited by an organization once a status of Permanently Inactive – Deceased and a date of death has been recorded. To change a status of Permanently Inactive – Deceased, contact the NYSIIS Help Desk.

8. **Allow Reminder and Recall Contact?**  Choosing Yes from the dropdown 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 dropdown list to exclude the patient from the report.

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

10. **Insurance Provider:** Choosing an insurance provider from the dropdown list selects an Insurance Provider.

11. **Policy Number:** Fill in the policy number of the Insurance Provider.

**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 not set to “Inactive” or “Permanently Inactive-Deceased on the Patient Information tab.
- The “Allow Reminder and Recall Contact? Indicator on the Patient Information tab is set to “Yes.”
- The patient has sufficient name and address information listed in the Address Information Section.
Insurance Information Section

If your organization uses the expanded functionality to create the Billing Export, you will see an additional Insurance Information section which allows you to identify multiple Insurers and assign a rank to each Insurer.

Click on the Insurance Information Section:

![Insurance Information Section](image.png)

To edit an existing insurer record, do the following:
1. Click on the Review radio button next to the name of the insurance you wish to edit.
2. Press Review.
3. Change or add information for the fields listed.
4. Press Apply Changes.
5. Press Save.

To enter a new insurer record, do the following:
1. Press Add New Ins.
2. Enter Information into the following fields:
   - **Insurer name**: Select the Insurer for the patient being entered
   - **Insurer Type**: Select the Type of Insurance being entered
   - **Patient Relationship to Insured**: Relationship to Insured
   - **Last Name**: Insured Last Name
   - **First Name**: Insured First Name
• **Middle Name:** Insured Middle Name
• **Date of Birth:** Date of Birth of Insured
• **Gender:** Insured Gender
• **Policy Number:** Policy Number of Insurance
• **Group Number:** Group Number of Insurance
• **Plan Name:** Name of Insurance Plan
• **Patient Marital Status:** Insured’s Martial Status
• **Patient Employment Status:** Employment Status
• **Street Address:** Street Address of Insured
• **Other Address:** Additional address information, if any, for example, a suite number or apartment number could be entered here.
• **P.O. Box:** P.O. Box of Insured
• **City:** City of patient’s address
• **State:** State of patient’s address
• **Zip:** Zip code of patient’s address
• **+4:** Extended zip code of patient’s address, if applicable.

3. Click ‘Apply Changes’, then ‘Save’ (in patient information section). This will apply the updates you have made to the Insurance Information Section

To delete an existing insurance record, do the following:
1. Select the Remove check box next to the record you wish to delete on the Insurance Information Listing.
2. Press **Remove**.
3. Press the Save button

To select a rank for an existing insurance record, do the following:
1. In the Insurance Information listing, select the applicable Primary, Secondary, or Tertiary radio button, or select the None checkbox.
2. Press **Apply Changes**.
3. Press the Save button

**Address Information Section**
The Address Information Section allows you to identify the current address of the patient.
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 dropdown 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 any, for example, a suite number or apartment number could be entered here.

5. **Zip**: Zip code of the patient.

6. **+4**: Extended Zip code numbers of the Patient, if available.

7. **City**: City (or town) of the patient’s address.

8. **State**: State of the patient’s address.

9. **County**: County where the patient resides.

10. **Phone Number**: Phone Number of the Patient.

11. **Extension**: Phone extension if applicable.

12. Clicking the view Patient Address History link will present a window with the patient’s address History.

13. Clicking the Find command button will take you to a search screen to search and add patients that are at the same address of this patient. This feature will be available once the Household function is added to NYSIIS.

**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.

Click on the **Responsible Persons** Section.
1. To edit an existing responsible person, do the following:
   • Click on the Review radio button next to the name of the person you wish to edit.
   • Press Review.
   • Change or add information for the fields listed.
   • Press Apply Changes.
   • Press Save.

2. To enter a new responsible person, do the following:
   • 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 dropdown 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 dropdown list provided.

• **ZIP:** Enter the responsible person’s ZIP code in this field.

• **+4:** Enter the responsible person’s +4 code in this field, if it is known.

3. To enter a new responsible person and save the information you entered in the Responsible Person Listing or view the next responsible person’s record click the Save command button.

4. To clear existing information and enter a new responsible person, press [Add New].

**Deleting an existing 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 the Save button

**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 dropdown 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 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 Print button on the immunization history page, the comments are displayed on separate lines in the Comments box.
Click on the **Patient Comments** Section.

1. Enter the following information:
   - Choose the appropriate comment/contraindication from the Patient Comment dropdown list.
   - 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 dropdown lists at the top and choose a day by clicking on the appropriate calendar day. Press **OK**.
   - 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 dropdown 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

**Restart Comments**

If a physician decides to repeat a vaccine series and the appropriate comment and Start Date are entered in NYSIIS, 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**

NYSIIS 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 NYSIIS.
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 \texttt{Remove}.
3. Press the Save button.

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

<table>
<thead>
<tr>
<th>Patient Notes (2)</th>
<th>▲</th>
</tr>
</thead>
<tbody>
<tr>
<td>[back to top]</td>
<td></td>
</tr>
</tbody>
</table>

Create New Note
Please do not include confidential information in the patient notes. Patient Notes can be viewed by any provider organization with access to the registry.
Enter Text of Note:

Historical Notes printer-friendly version

<table>
<thead>
<tr>
<th>Remove</th>
<th>Created by</th>
<th>Create Date</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>Burmeister, Jason</td>
<td>08/26/2011 12:00 AM</td>
<td>a</td>
</tr>
<tr>
<td>□</td>
<td>Burmeister, Jason</td>
<td>08/26/2011 12:00 AM</td>
<td>s</td>
</tr>
</tbody>
</table>

A note can be removed by the user who created it. Please contact the NYSIS Help Desk if you need additional assistance.

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

Deleting an existing note
1. Select the Remove check box next to the comment you wish to delete on the Patient Notes Listing table.
2. Press \texttt{Remove}.
3. Press the Save button.
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 NYSIIS 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.

Blood Lead: As with the Save command button, the **Blood Lead** command button will save all information fields. Once the information is saved, the patient’s Blood Lead Test History screen will display.

Cancel: When pressed, the **Cancel** command button clears all entered information and **does not save it to NYSIIS**. 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, NYSIIS initiates a process that ensures that the patient information you entered does not duplicate a patient that already exists in NYSIIS.

If, after attempting to save a new patient, you receive a message box titled “Patient Match Detected,” NYSIIS 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 NYSIIS. Click on each last name to display his or her information. NYSIIS 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 NYSIIS Help Desk immediately.
Patient Consent
Patient consent applies to patients who are 19 years of age or older. Patient Consent is written permission the patient gives to the State to allow the entry of their demographic information and immunization records into NYSIIS.

The consent indicator displays on the Enter/Edit Patient screen for patients 19 years of age or older. It should be set to Yes if signed written consent from the patient has been obtained. It should be set to No if the patient has refused to give consent or was once consented, but now wishes to revoke that consent.

The consent indicator may be empty or non-specified if there has not yet been any opportunity to verify consent since the patient’s 19th birthday.

For a patient over 18 years old, setting consent indicator to No or leaving it empty has a significant impact on the patient’s record. Users will not be able to edit any information or record or edit immunizations for the patient. However, the patient’s data is available for viewing on-line and on all reports because at the time the data was recorded, it was consensuted or mandated into the registry by legislation.

Countermeasure and Response Administration Module (CRA)

Note: In the event of a public health emergency, NYSIIS 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.

CRA Event Information Section
If your organization is selected for an event, the 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
Based on candidate screening, select the appropriate priority group category for each patient.

1. Effective Events are displayed.
   - The Age Group is not required and will be calculated at the time of vaccination.
   - The Priority Group Value (Code) is displayed in the dropdown list. When selected, a full description of the selected priority group will be listed to the right of the priority group dropdown list.
Managing Immunizations

In this chapter:

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

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, 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 NYSIIS. 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, Managing Patients.
**Immunization History**

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

<table>
<thead>
<tr>
<th>Vaccine Group</th>
<th>Date Administered</th>
<th>Series</th>
<th>Vaccine [Trade Name]</th>
<th>Dose</th>
<th>Owned?</th>
<th>Reaction</th>
<th>Ill?</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTaP</td>
<td>07/28/2000</td>
<td>1 of 5</td>
<td>DTaP-IPV [Krinix S]</td>
<td>Full</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>05/23/2000</td>
<td>2 of 5</td>
<td>DTP-Hib-IPV [Pentacel®]</td>
<td>Full</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Polio</td>
<td>07/28/2000</td>
<td>1 of 3</td>
<td>DTaP-IPV [Krinix S]</td>
<td>Full</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Td/DTaP</td>
<td>05/28/2011</td>
<td>1 of 2</td>
<td>TdSP &gt; 7 years [Adacel®]</td>
<td>Full</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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. "Partial Dose" will display if the shot is flagged as a partial dosage.

**Vaccine [Trade Name]:** This column displays the Vaccine Name, and the manufacturer’s Trade Name of the vaccine is shown in square brackets.

**Dose:** This column indicates whether full, half or multiple doses were administered to the patient.

**Owned?:** If the value in the owned column is blank, the immunization data are owned by your organization. This would be a result of either manual data entry of this information 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 NYSIIS. 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. If this column is blank, this indicates the immunization was administered by the organization that owns the data (i.e. entered the data into NYSIIS).

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 NYSIIS, but an organization does own the immunization data it enters into NYSIIS. 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” or non-historical shots may only be edited by the organization that administered the vaccine and entered the data in NYSIIS.

Validation of Combination Vaccines
NYSIIS 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.

Between the History section and the Recommended Tracking Schedule section, the patient’s exact age is shown in a solid blue field. The age also displays on the printable version of this page.
Vaccines Recommended by Selected Tracking Schedule

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

<table>
<thead>
<tr>
<th>Select</th>
<th>Vaccine Group</th>
<th>Earliest Date</th>
<th>Recommended Date</th>
<th>Overdue Date</th>
<th>Latest Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>DT/IPV</td>
<td>07/01/2011</td>
<td>07/01/2011</td>
<td>07/01/2013</td>
<td>06/01/2014</td>
</tr>
<tr>
<td></td>
<td>IPV, MMR, Var</td>
<td>12/16/2009</td>
<td>12/16/2009</td>
<td>01/27/2010</td>
<td></td>
</tr>
<tr>
<td>☑</td>
<td>HepA</td>
<td>05/12/2009</td>
<td>05/12/2009</td>
<td>12/12/2009</td>
<td></td>
</tr>
<tr>
<td>☑</td>
<td>HepB</td>
<td>07/27/2008</td>
<td>07/27/2008</td>
<td>01/01/2009</td>
<td></td>
</tr>
<tr>
<td>☑</td>
<td>Hib</td>
<td>04/29/2009</td>
<td>04/29/2009</td>
<td>07/01/2009</td>
<td>06/00/2012</td>
</tr>
<tr>
<td>Pneumococcal</td>
<td>Complete</td>
<td>Complete</td>
<td>Complete</td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Polio</td>
<td>03/29/2008</td>
<td>07/01/2011</td>
<td>07/01/2014</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Varicella</td>
<td></td>
<td>Complete</td>
<td>Contraindicated</td>
<td></td>
</tr>
</tbody>
</table>

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.

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.

Overdue 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.

Latest Date: This date is the latest date at which the patient may receive the vaccine.
**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 NYSIIS. Some of the more common colors applied to the dates within the columns are defined as follows:

**Yellow:** A date shaded yellow indicates that today’s date is equal to or past the earliest date and before the recommended date for an immunization that has not yet been received.

**Green:** A date shaded green indicates that today’s date is equal to or past the recommended date and before the overdue date for an immunization that has not yet been received.

**Blue:** A date shaded blue indicates that today’s date is equal to or past the overdue date and before the latest date (if a maximum age exists) for an immunization that has not yet been received.

**Pink:** A row shaded pink indicates the patient has completed the immunization series, has completed the series early, or has exceeded the maximum age for the vaccine.

**Other Features on the Immunization History Screen**

The Immunization History screen contains links to other NYSIIS 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.

- **Blood Lead:** Pressing this button will bring you to the Blood Lead Test History screen for the patient.

- **Print:** Pressing this button will display the patient’s immunization information without the top or side NYSIIS 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 NYSIIS 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.
Risk Assessment and Lead Test Recommendations

A message is displayed on the Immunization Recommendation screen for all children up to age 18 to alert a health care provider of the need for a risk assessment or a follow-up action. All users and roles may view the message.

Actions of BLL < 10 or BLL < 5 (blood lead level less under 10 or under 5) result in recommendations for Risk Assessments and Lead Tests displaying in green, with dates based upon the child’s age.

<table>
<thead>
<tr>
<th>Age</th>
<th>Recommendation</th>
<th>Date Due</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>24 months</td>
<td>Test All Children</td>
<td>11/21/2011</td>
<td>Due</td>
</tr>
</tbody>
</table>

- Go to the lead history page by clicking on the link in the Status column

When the last blood lead level “Action” on the Blood Lead Test History Table is Repeat Test, Requires Venous Test to Confirm, or Requires Follow-up/Management, recommendations will still be displayed, but View Blood Lead Test History – Action Required! displayed in bold and red letters. The “View Blood Lead Test History – Action Required!” is a link to the corresponding Blood Lead Test History Table row for users with the ability to see blood lead tests.

View Blood Lead Test History - Action Required!
**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 NYSIIS, Other or Historical inventory screen.

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 NYSIIS for your organization. Refer to “Managing Clinicians” in Chapter 8 of the NYSIIS 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, NYSIIS will default the date administered to the current day.

5. Select the check boxes in either the **From NYSIIS Inv.** or **From Other Inv.** column for the vaccines that were given by your organization.
- **From NYSIIS Inv** means the provider is using the NYSIIS Inventory module and the inventory will be automatically decremented accordingly.
- **From Other Inv** means the shot is coming from the provider’s inventory, which is being maintained outside of NYSIIS.
  - You will only use one type of inventory or the other, depending on how your organization decides to manage its’ inventory.
  - For combination vaccines, such as HepB-Hib, select only one vaccine component – only HepB or Hib. On the next screen when you select the trade name NYSIIS will recognize the combination vaccine and record all components.
- 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.

6. To advance to the Immunization Details screen, press OK.
**Note:** When you go to the Immunization Details screen to enter the “Trade Name – Lot” from NYSIIS 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 NYSIIS, 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 NYSIIS Help Desk.

**Immunization Detail Entry Screen**

1. After selecting OK from the NYSIIS, Other or Historical Inventory screen, the Immunization Detail Entry Screen will display:

   ![Immunization Detail Entry Screen](image)

2. New Immunizations - Verify or enter the Date provided, and the Ordering Authority for the new immunization(s) listed in the New Immunizations table.
3. Place a check in the Remove check box only if this immunization should not be entered into the NYSIIS database. For example, if NYSIIS informs you that the immunization is a duplicate, you should remove or modify the entry.
4. Choose a Trade Name-Lot and Funding Type from the drop down list for the first listed vaccine.
   - If using the NYSIIS Inventory module, choosing the “Trade Name – Lot” populates the Trade Name and Lot Number, and whether the vaccine funding was private or public.
   - If using Other Inventory, providers must record Trade Name, Lot Number, and the Funding Type (Public or Private) separately.
   - Providers are not required to enter lot numbers for historical immunization records.
5. Enter additional drop down list information for the following fields for each vaccine:

- **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.
- **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.
- **VFC Eligibility:** This field should be filled with the individual dose’s VFC eligibility. This field is required if the immunization is being administered to a patient under age 19.
- **If the immunization is Historical,** enter a “Date Provided” and “Source of Immunization” for each immunization listed.

6. Under Patient Comments, select a comment or refusal from the drop down list, if applicable. Enter an applies-to 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.

7. If your organization uses the expanded functionality to create the Billing Export, you will see an additional Billing Information section:

By default, the billing information is not displayed for new immunizations. If you wish to record billing information, choose the “Yes” radio button and enter the following information:
• Select Professional or Institutional.
• Select the Insurance provider from the dropdown list. This list populates from the Insurance Information section of the patient demographics screen.
• Select the Vaccine Fee. If your fee is not listed, choose “Manual Entry” to enter your own.
• Select the Vaccine Fee Payer - Insurance, Out of Pocket or None.
• Select the Administration Fee. If your fee is not listed, choose “Manual Entry” to enter your own.
• Select the Administration Fee Payer - Insurance Commercial/Public, Out of Pocket, or None.
• Enter the Co-Pay and Amount Paid fields as applicable
• Select the appropriate Medical Code from the dropdown list.
• If applicable, enter additional information for Work Related, Auto Accident, Other Accident, ECI Code, Document Control Number, Medical Record Number, Prior Authorization Number, Referring Provider, Outside Lab, Type of Bill, Source of Admission, Value Codes, and Value Code Amounts.

8. When immunization details are complete, press “Save”.
9. NYSIIS 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

NYSIIS 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.” NYSIIS 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 NYSIIS overrides duplicate immunization records:

- If there is a historical immunization on file and the same immunization is entered from NYSIIS inventory, no warning message will appear; instead it processes the new immunization and removes the historical immunization.
- If there is a historical immunization on file and a matching immunization is entered from Other Inventory, a warning message will appear. The user then has the choice to cancel the new immunization or save it anyway (adding a duplicate immunization). The user would need to explicitly delete the historical immunization to remove the duplicate records.

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.
2. In the Edit Historical Immunization screen, you may edit information for the Vaccine Lot Number, Date provided, 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].


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.
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 Provided, VFC Eligibility, Ordering Authority, Administered By, Body Site and/or Administered Route fields on the Edit Immunization screen.

4. Update Billing Information if applicable.

5. To indicate a Vaccine Information Statement (VIS) date other than the most current (default) date, choose an alternate date from the drop down list.

6. To record a reaction to the immunization, check the box next to the applicable reaction.

7. 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, NYSIIS 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:
- New Patient Form
- Parent Notification Letter
- Parent Notification Labels
- Patient Consent Form
- Withdrawal of Consent Form
- Parent Information – Lead
- Provider Information – Lead
- Ad Hoc List Report
- Ad Hoc Count Report
- Assessment Report
- Benchmark Report
- Group Reports
- Vaccine Administration Record
- Immunization History Report
- Immunizations Needed Report
- Health Appraisal Form
- Childcare Report
- Reminder/Recall
- Vaccines for Children Report
- Vaccines for Children Report Totals
- CoCASA Extract
- Blood Lead Reports
- Temperature Log Report
- Billing Export Request
Forms

For patients 18 years of age and younger, the following forms are available:

- New Patient Form
- Parent Notification Letter
- Parent Notification Labels

For a patient who is 19 years of age or older, the following forms are available:

- Patient Consent Form
- Withdrawal of Consent Form

New Patient Form

The New Patient Form allows you to print a blank Vaccine Administration Record, which includes a current inventory table for the selected provider organization. Use this form to collect information on a patient who does not yet exist in the NYSIIS 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. Click on the Forms menu option at the top of the page.

2. At the New Patient Form Request screen, pick the organization where the patient will be seen so that the appropriate inventory will appear on the record.

3. Choose the language in which you would like the new patient form to display.

4. Press Generate.

5. The form displays in Adobe Reader®

6. To print the report, press the printer icon on the Adobe® toolbar.

7. Press OK in the Print dialog box.

8. To return to the Forms screen, you may close Adobe Reader® by clicking the X in the upper right corner of the New Patient Form window.
**Parent Notification Letter**

The Parental Notification is designed to notify parents who have children that are 18 years of age and under that their child’s immunization information will be reported to NYSIIS in accordance to state public health law. This letter should be printed and shared with parents at the time a child comes in for an immunization.

1. To generate the Parent Notification Letter, click on the Forms button located at the top of each screen in NYSIIS.

2. Under the Parent Information Section, click on the Information for Parents link to open the Parent Notification Letter.

3. To print the report, press the printer icon on the Adobe® toolbar. Press **OK** in the Print dialog box.

4. To return to the Forms screen, you may close the Adobe Reader® by clicking the X in the upper right corner of the Parent Notification Letter window.
**Parental Notification Labels**

The Parental Notification is designed to notify parents who have children that are 18 years of age and under that their child’s immunization information will be reported to NYSIIS in accordance to state public health law. Parent Notification Labels should be printed and used in conjunction with the Parent Notification Letter.

1. Click on **Parental Notification** under the Reports section of the menu panel.

2. On the Parental Notification Screen, specify the criteria necessary to capture desired patients. You may choose to generate for all patients under 19 years old, patients under 19 years old who were added to NYSIIS within a certain date range, or patients under 19 in a particular birth date range.

3. Choose whether you want to generate the parental notification letters, mailing labels, or both.

4. Click the Generate button. The system starts to generate the letters and/or mailing labels and takes you to the Check Parental Status screen.

5. After the output finishes generating, the top line of the Check Parental Status screen becomes a hyperlink. Click on the hyperlink.

6. The system displays the report output in PDF format.
**Patient Consent Form**

A Patient Consent Form is required for patients who are 19 years of age or older. The patient may sign this form to give written consent to share immunization data with all providers participating in NYSIIS. Keep the signed consent form on file at your organization. To generate the form, follow these steps:

1. From anywhere in the NYSIIS application, click on the **Forms** button located at the top of the screen.
2. On the Forms page, choose whether you want to print the Patient Consent Form in either English or Spanish. Then click on **Patient Consent**, which is underlined and in blue text.
3. Once the report is generated, it will be displayed using Adobe Reader®. Refer to the Optimizing NYSIIS chapter in this manual for more information on Adobe Reader®.

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 Forms screen, you may close Adobe Reader® by clicking the X in the upper right corner of the Patient Consent Form window.
Withdrawal of Consent Form

For patients who are 19 years of age or older, the Withdrawal of Consent Form is the form the patient may sign to indicate that no further modifications or edits should be made to his or her NYSIIS record. To generate the form, follow these steps:

1. From anywhere in the NYSIIS application, click on the Forms button located at the top of the screen.
2. On the Forms page, click on Withdrawal of Consent Form, which is underlined and in blue text.
3. Once the report is generated, it will be displayed using Adobe Reader®. Refer to the Optimizing NYSIIS chapter in this manual for more information on Adobe Reader®.
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 Forms screen, you may close Adobe Reader® by clicking the X in the upper right corner of the Withdrawal of Consent Form window.
Note: Under Public Health Law 2168, patients who are 18 years of age and younger do not have the option to grant or revoke consent, so the Patient Consent Form and Withdrawal of Consent Form are not required for them.

Parent Information – Lead
What Your Child’s Blood Lead Test Means is an educational document for health care providers to print and share with parents after receiving the child’s blood lead test results. The document includes a brief explanation of next steps depending upon the child’s blood lead level, and lead poisoning prevention messages. PDFs are available in English, Spanish, French, Russian, Arabic, Haitian Creole, Hindi, Karen, Maay Maay, and Somali.
Provider Information – Lead
Publication Order Form – Lead is a form to order free NYS lead poisoning prevention educational materials. This form can be faxed or mailed to the NYS State Department of Health.

Order Form
NYS Department of Health
Lead Poisoning Prevention Educational Materials

Complete and mail or fax form to:
NYS Department of Health 
Distribution Center
21 Simonsen Lane
Menashe, NY 12544

Orders can also be emailed to the Distribution Center at: 8001931@health.state.ny.us
Include your name, agency (if any), address, phone, publication title and number, description, and quantity.

Prior approval is required for orders over 200 for any one piece. Call the Lead Program (518) 485-5706.

NAME: 

ORGANIZATION: 

ADDRESS: 

TELEPHONE NUMBER: ( )

<table>
<thead>
<tr>
<th>TITLE</th>
<th>PUBLICATION NUMBER</th>
<th>QUANTITY</th>
</tr>
</thead>
</table>
| STORY & COLORING BOOKS
  Lee the Little Lion Learns How to Get Ahead of Lead - Storybook... English 2133 |
| STORY & COLORING BOOKS
  Lee the Little Lion Learns How to Get Ahead of Lead - Coloring book... English 2141 |
| STORY & COLORING BOOKS
  Lee the Little Lion Learns How to Get Ahead of Lead - Coloring book... Spanish 2134 |
| STORY & COLORING BOOKS
  Lee the Little Lion Learns How to Get Ahead of Lead - Coloring book... Spanish 2144 |
| STICKERS
  Let’s Say “Sock It” - Hand Washing Stickers... English 2513 |
| STICKERS
  At One and Two, Testing for Lead is What to Do... English 2514 |
| STICKERS
  At One and Two, Testing for Lead is What to Do... Spanish 2481 |
| STICKERS
  At One and Two, Testing for Lead is What to Do... Spanish 2581 |

Note: Orders can not be placed by phone, but if you have a question about your order, please call the Distribution Center: (518) 465-8170.
Reports

Ad Hoc Reports
The Ad Hoc Reports function in NYSIIS 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.

Create a Customized List Report

<table>
<thead>
<tr>
<th>Patient</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Birth County</td>
<td></td>
</tr>
<tr>
<td>Birth date</td>
<td>Add &gt;</td>
</tr>
<tr>
<td>Consent indicator</td>
<td>&lt; Remove</td>
</tr>
<tr>
<td>County of Residence</td>
<td>Remove All</td>
</tr>
<tr>
<td>First name</td>
<td></td>
</tr>
<tr>
<td>Insurer</td>
<td></td>
</tr>
<tr>
<td>Language preference</td>
<td></td>
</tr>
<tr>
<td>Last name</td>
<td></td>
</tr>
</tbody>
</table>
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 NYSIIS 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.

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Started</th>
<th>Completed</th>
<th>Status</th>
<th>Row Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIST</td>
<td>11/02/2003 12:21 PM</td>
<td>11/02/2003 12:21 PM</td>
<td>DONE</td>
<td>0</td>
</tr>
</tbody>
</table>

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; NYSIIS 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.

**Assessment Reports**
The Assessment Report feature in NYSIIS provides a comprehensive analysis of an organization’s immunization status. The following is a brief overview of the data that are returned on each table within the Assessment Report. These reports can be helpful when preparing for an AFIX visit or assessing your own organization’s data for quality assurance purposes.

1. Click on Assessment Report under the Reports section of the menu panel.

   ![Assessment Report](image)

   2. Select the patient population to be assessed by clicking one of the following:
      - **Patients Associated with Selected Site:** Choose this option to view immunization data on all patients associated with the site selected from the drop down list at the right of the dialog box.
      - **All Patients Associated with <Organization Name>:** Choose this option to view immunization data on all patients associated with your organization.
      - **All Patients Residing in <City or County Name>:** Choose this option to view immunization data on all patients within a given city or county. This option is only available for city or county organizations.
      - **All Patients Associated with <Organization Name> or Residing in <City or County Name>:** Choose this option to view immunization data on both patients associated with your organization and those residing within a given city or county. This option is only available for city or county organizations.
3. Select the age, birth date range, or age range of the patients by choosing one of the following:
   - Less than or equal to 72 months old: Choose this option to return all patients who are 72 months or younger.
   - Birth date range: Choose this option to enter a range of birth dates. Enter the earliest birth date in the first field and the latest birth date in the second field. Or, use the calendar icons beside each field to enter the dates.
   - Age range: Choose this option to enter an age range. Enter the youngest age range in the first field; use the drop down list next to it to choose days, months or years. In the Oldest Age field, enter an age and use the drop down list to choose days, months or years.

4. Select either the Standard Assessment or the Assess Patients with Sufficient Refusal history as Covered option for the report by choosing the appropriate radio button. Selecting the second option will return an assessment report that counts patients with sufficient refusal comments as being up-to-date.

5. Select the assessment report evaluation date by entering the date in the field provided or by using the calendar icon to enter the date. No immunizations administered after the evaluation date will be included in the report.

6. Press *Generate*.

7. The Assessment Report Status screen will display. Press *Refresh* occasionally to check on the progress of the report. When the report is ready, the job name will appear underlined and in blue text. At this screen you may do the following:
   - Select an age from the drop down list provided and press Generate (to the right of the age drop down list) if you wish to create an assessment report listing patients for an age-specific benchmark. This report lists the patient’s name, address, telephone number, and the vaccinations that they did or did not complete or refused by the benchmark age. A patient will show on the report if they missed at least one age-specific benchmark.
   - Click the underlined job name.
     - The report listing patients by benchmark age will have a job name of: *(Benchmark Patient Listing) <Organization Name>* - *<Benchmark Age>*.
     - The assessment report will be called: *(Assessment Report)<Organization Name>* - *<Date>*
     - A report listing all patients who have missed a vaccination opportunity will have a job name of: *(Missed Opps Patients)<Organization Name>*-<Date>.
   - Click an underlined age range to view a listing of patients returned that fall within the specified range. This list will give the name, address, and telephone number for all patients meeting the record criteria. To view patients for all age ranges that meet the criteria, click on the All Age Ranges link.

8. The report displays in Adobe Reader® if you clicked one of the report or age range links. To print one of the reports, press the printer icon on the Adobe® toolbar.

9. Press *OK* in the Print Dialog box

10. To return to the Assessment Report Status screen, press the *BACK* button on your browser.
**Note:** *Patients with Refusals*

If the option to Assess Patients with Sufficient Refusal History as Covered is selected when the assessment report is run, patients who fall short of needed, valid doses but have sufficient refusals to meet the benchmark are included within the count as if they received the needed doses.

**Understanding the Assessment Report**

The following is a brief overview of the data that is returned on each table within the assessment report.

**Table 1**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Records Analyzed</th>
<th>Inactive</th>
<th>Records Meeting Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>36-72 Months of Age</td>
<td>50</td>
<td>0</td>
<td>50</td>
</tr>
<tr>
<td>24-35 Months of Age</td>
<td>51</td>
<td>0</td>
<td>51</td>
</tr>
<tr>
<td>12-23 Months of Age</td>
<td>54</td>
<td>0</td>
<td>54</td>
</tr>
<tr>
<td>&lt; 12 Months of Age</td>
<td>46</td>
<td>0</td>
<td>46</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>201</strong></td>
<td><strong>0</strong></td>
<td><strong>201</strong></td>
</tr>
</tbody>
</table>

**Age Group:** This column displays the age ranges used for evaluation.

**Records Analyzed:** This column displays the count of selected patients within the age group that are included in this report.

**Inactive:** This column displays the count of selected patients within the age group that are not active.

**Records Meeting Criteria:** This column displays the count of selected patients within the age group.
### Table 2

<table>
<thead>
<tr>
<th>Age (months)</th>
<th>Up-to-Date (UTD)</th>
<th>Late (UTD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>36 – 72 Months of Age</td>
<td></td>
<td></td>
</tr>
<tr>
<td>72</td>
<td>82.08</td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>88.08</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>82.08</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>82.08</td>
<td></td>
</tr>
<tr>
<td>24 – 35 Months of Age</td>
<td></td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>86.44</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>78.44</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>76.54</td>
<td></td>
</tr>
<tr>
<td>12 – 23 Months of Age</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>92.78</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>81.34</td>
<td></td>
</tr>
<tr>
<td>&lt; 12 Months of Age</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>99.14</td>
<td></td>
</tr>
</tbody>
</table>

1) UTD by 7 months equals: 3 DTaP, 2 HepB, 2 Hib, 2 Polio
2) UTD by 12 months equals: 4 DTaP, 2 HepB, 2 Hib, 2 Polio
3) UTD by 24 months equals: 4 DTaP, 3 HepB, 3 Hib, 1 MMR, 3 Polio, 1 Varicella.
4) UTD by 72 months equals: 5 DTaP, 3 HepB, 4 Hib, 2 MMR, 4 Polio, 1 Varicella.
Late UTD equals the same benchmark for the age group, but it is assessed on the date the report was run.

**Age (Months):** This column displays the age of the patient on the assessment date.

**Up-to-Date (UTD):** This column displays the percent of patients (out of the total number of active patients for that age group) meeting the criteria on the assessment date. The criteria are given at the bottom of the report page. For example, a seven-month-old UTD patient who has met the criteria will have had three DTaP, two HepB, two Hib, and two Polio vaccinations.

**Late UTD @ Assessment:** This column displays the percent of patients (out of the total number of active patients for that age group) meeting the criteria on the date the report was run, rather than on the assessment date.
The Age-Specific Immunization Benchmarks chart shows how many doses of each vaccine a patient should have by the age listed at the left to be determined UTD. This chart is used to create the Assessment of Patients Meeting Age-Specific Benchmarks table.

Table 3

<table>
<thead>
<tr>
<th>UTD Grid</th>
<th>DTaP</th>
<th>Hep B</th>
<th>Hib</th>
<th>MMR</th>
<th>Polio</th>
<th>Prevnar</th>
<th>Varicella</th>
</tr>
</thead>
<tbody>
<tr>
<td>@ 3 months</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>@ 6 months</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>@ 7 months</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>@ 9 months</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>@ 12 months</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>@ 16 months</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>@ 18 months</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>@ 21 months</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>@ 24 months</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>@ 28 months</td>
<td>5</td>
<td>3</td>
<td>4</td>
<td>2</td>
<td>4</td>
<td>4</td>
<td>1</td>
</tr>
</tbody>
</table>

Table 4

<table>
<thead>
<tr>
<th>UTD Age</th>
<th>DTaP</th>
<th>Hep B</th>
<th>Hib</th>
<th>MMR</th>
<th>Polio</th>
<th>Prevnar</th>
<th>Varicella</th>
<th>Total Meeting Age Criteria</th>
<th>% Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 Months</td>
<td>103</td>
<td>184</td>
<td>167</td>
<td>178</td>
<td>40</td>
<td>201</td>
<td>191</td>
<td>17.4%</td>
<td></td>
</tr>
<tr>
<td>6 Months</td>
<td>196</td>
<td>182</td>
<td>180</td>
<td>175</td>
<td>42</td>
<td>201</td>
<td>191</td>
<td>17.0%</td>
<td></td>
</tr>
<tr>
<td>9 Months</td>
<td>175</td>
<td>194</td>
<td>190</td>
<td>181</td>
<td>42</td>
<td>201</td>
<td>191</td>
<td>19.4%</td>
<td></td>
</tr>
<tr>
<td>12 Months</td>
<td>175</td>
<td>184</td>
<td>190</td>
<td>181</td>
<td>42</td>
<td>201</td>
<td>191</td>
<td>19.4%</td>
<td></td>
</tr>
<tr>
<td>15 Months</td>
<td>135</td>
<td>142</td>
<td>148</td>
<td>141</td>
<td>42</td>
<td>150</td>
<td>138</td>
<td>25.2%</td>
<td></td>
</tr>
<tr>
<td>18 Months</td>
<td>103</td>
<td>93</td>
<td>137</td>
<td>118</td>
<td>97</td>
<td>116</td>
<td>110</td>
<td>.7%</td>
<td></td>
</tr>
<tr>
<td>21 Months</td>
<td>103</td>
<td>95</td>
<td>137</td>
<td>121</td>
<td>101</td>
<td>115</td>
<td>119</td>
<td>.7%</td>
<td></td>
</tr>
<tr>
<td>24 Months</td>
<td>127</td>
<td>123</td>
<td>137</td>
<td>141</td>
<td>106</td>
<td>129</td>
<td>147</td>
<td>4.1%</td>
<td></td>
</tr>
<tr>
<td>27 Months</td>
<td>89</td>
<td>90</td>
<td>92</td>
<td>95</td>
<td>95</td>
<td>94</td>
<td>101</td>
<td>80.6%</td>
<td></td>
</tr>
<tr>
<td>30 Months</td>
<td>75</td>
<td>45</td>
<td>67</td>
<td>54</td>
<td>55</td>
<td>89</td>
<td>50</td>
<td>.5%</td>
<td></td>
</tr>
</tbody>
</table>

UTD Age: This column shows the maximum age the patient has attained by the assessment date.

Vaccine Columns: These seven columns display the count of the patients who have met the vaccination criteria by the UTD age.

Total Meeting Age Criteria: This column gives a count of all the patients who are at least the age listed under UTD Age. However, the 72 Months UTD Age category includes patients from 48 to 72 months of age.

% Coverage: This column displays the percentage of patients meeting all UTD criteria, out of a total of all patients at least the age listed under UTD Age.
Table 5

| Children Who Could Have Been Brought Up-To-Date With Additional Immunizations |
|--------------------------------------------------|------|-----|
| <= 12 Months of Age | 5 | 10.9% |
| 1 Vaccine Needed | 2 | 40.0% |
| 2 Vaccines Needed | 3 | 60.0% |
| 3 Vaccines Needed | 0 | .0% |
| 4 Vaccines Needed | 0 | .0% |

Column 1: In the first row of column one, the age range of patients examined in this table is displayed. In subsequent rows within this column, the number of vaccines needed by the patient is displayed.

Column 2: In the first row of column two, a count is displayed of all patients for this age group who are behind schedule for four or fewer vaccinations. Subsequent boxes display a count of patients for this age group who need additional vaccinations to be UTD.

Column 3: In the first row of column three, a percent is displayed of all patients for this age group who are behind schedule for four or fewer vaccinations (out of the total number of patients for this age group). Subsequent rows within this column display a percentage of patients for this age group who need additional vaccinations to be UTD.

Table 6

| Children Who Got A Late Start or Have Dropped Off Schedule After A Good Start |
|--------------------------------------------------|------|------|
| Late Start Rates: | Beginning > 3 mo. age | 100.0% | 36-72 mo. age group |
| | | 24.0% | 24-35 mo. age group |
| | | 88.1% | 12-23 mo. age group |
| | 60-72 | .0% | 24 month status |
| | 48-59 | .0% | 24 month status |
| | 36-47 | .0% | 24 month status |
| Drop Off Rates: | 24-35 mo. age | .0% | 24 month status |
| | 12-23 mo. age | 5.6% | 12 month status |

Late Start Rates: A patient who did not receive one full dose of DTaP by 90 days of age is considered to have gotten a late start. The values in column three of the late start row are the percentages of patients (within the age groups listed in column four) who have not received the first DTaP dose by 3 months of age.

Drop Off Rates: The drop off rate section of this chart shows the percentage of patients (column three) in various age groups (column two) who have not gone beyond 12 or 24-month status (column four) in their immunizations. Immunization status is calculated using the formula outlined at the bottom of
the chart.

**Table 7**

<table>
<thead>
<tr>
<th>Patients Who Do Not Have a Birth Dose of HepB and Have Not Completed the 3 Dose Series</th>
<th>Number</th>
<th>Per Cent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patients Missing Birth Dose Of Hep</td>
<td>14</td>
<td>7.0%</td>
</tr>
</tbody>
</table>

The Hep B chart gives the number and percentage of patients who did not receive a birth dose of the Hep B vaccination and who did not complete the three-dose series. Patients evaluated are between six and 72 months old and have at least one immunization in NYSIIS.

**Table 8**

<table>
<thead>
<tr>
<th>Missed Opportunity Assessment</th>
<th>Age Group on Evaluation Date</th>
<th>Total Patients in Age Group</th>
<th>Patients Not up to Date</th>
<th>Missed Opportunity on Last Visit</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Count</td>
<td>Percent</td>
</tr>
<tr>
<td>&lt;32 months: 7 month benchmark</td>
<td></td>
<td>62</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>12-13 months: 12 month benchmark</td>
<td></td>
<td>79</td>
<td>74</td>
<td>93.7%</td>
</tr>
<tr>
<td>24-25 months: 24 month benchmark</td>
<td></td>
<td>52</td>
<td>51</td>
<td>98.1%</td>
</tr>
<tr>
<td>36-72 months: 24 month benchmark</td>
<td></td>
<td>118</td>
<td>117</td>
<td>99.3%</td>
</tr>
</tbody>
</table>

Age Group on Eval Date: This column lists the age group of the selected patients and the immunization benchmark used for evaluation.

Total Patients in Age Group: This column gives the total number of patients within the age group listed in the first column.

Patients Not Up to Date: This column gives the count and percentage of patients who are not up to date for the benchmark listed in column one.

Missed Op on Last Visit: This column gives the count and percentage of patients who are not up to date and who had a missed opportunity for vaccination on the last visit or before the evaluation date.

The missed opportunities report lists all your organization’s patients who have missed
opportunities to be vaccinated. This report lists the patient's first and last names, birth date, and date of each missed opportunity by vaccine group.

Note: Missed Opportunities Assessment
Keep in mind, since NYSIIS is used for reporting immunization records, it only identifies patients that had at least one immunization at their last visit, but missed an opportunity to receive additional immunizations. The Missed Opportunities Assessment in NYSIIS will not include any patients that were treated at your organization for any other reason except vaccination purposes.

Benchmark Reports
Benchmark reports allow NYSIIS users to retrieve a list and count of patients who have met an immunization benchmark or predefined series of benchmarks. The resulting report may be viewed in NYSIIS, exported as a text file, exported as a spreadsheet or exported as a Portable Document Format (PDF) file.

To generate a benchmark report, follow these steps:
1. Click on Benchmark Report under the Reports section of the menu panel.
2. Select the patient population to be assessed by clicking on one of the following:
   - Patients Associated with Selected Site: Choose this option to view immunization data on all patients associated with the site selected from the drop down list at the right of the dialog box.
   - Patients Residing in <City or County Name>: Choose this option to view immunization data on all patients within a given city or county. This option is only available for city or county organizations.
   - Patients Associated with <Organization Name> OR Patients Residing in <City or County Name>: Choose this option to view immunization data on patients associated with your organization and those residing within a given county or city. This option is only available for city or county organizations.
   - All Patients Associated with <Organization Name>: Choose this option to view immunization data on all patients associated with your organization.
3. Click one of the following to specify the patients to return on the report:
   - Patients who did NOT meet the benchmark: Choose this option to return a list of patients who did not meet the benchmark(s) defined in the table.
   - Patients who DID meet the benchmark: Choose this option to return a list of patients who met the benchmark(s) defined in the table.
   - All patients, regardless of whether they met the benchmark or not: Choose this option to return a list of all patients meeting the criteria defined on the screen.
4. Select the age, birth date range, or age range of the patients by choosing one of the following:
   - Less than or equal to 72 months old: Choose this option to return all patients who are 72 months old or younger.
   - Birth date range: Choose this option to enter a range of birth dates. Enter the earliest birth date in the first field and the latest birth date in the second field that you wish included on the report, or use the calendar icons beside each field to enter the dates.
   - Age range: Choose this option to enter an age range. Enter the youngest age in the first field, then use the drop down list next to it to choose days, months, or years. In the Oldest Age field, enter an age and use the pick list to choose days, months, or years.

5. Select either the Standard Assessment or the Assess Patients with Sufficient Refusal History as Covered option for the report by choosing the appropriate radio button. Selecting the second option will return a benchmark report that counts patients with sufficient refusal comments as being up-to-date.

Refusals of Vaccine

In order for patient refusals of vaccine to be calculated correctly on assessment and benchmark reports, an appropriate Applies-to-Date must be entered for refusal comments on the Patient Comments tab. Refer to the Manage Patients chapter of this manual for more information.

6. Select the report evaluation date by entering the date in the field provided or by using the calendar icon to enter the date. No immunizations administered after the evaluation date will be included in the report.

7. Select the benchmark(s) to be used on the report:
   - To select one or more single vaccine benchmarks within a single row, click the box where the vaccine and the number of months intersect. For example, clicking the box with “4” in it where “DTaP” and “@ 19 months” intersect will result in a report with this benchmark included.
   - To select all benchmarks in a row, you may click on the first box in the row that indicates “@ X months.”
   - To select benchmarks in a predefined series, select one of the 431, 43133, or 431331 combinations at the bottom of the table.

8. Press Generate.

9. The Benchmark Report Status screen will display. Press Refresh occasionally to check on the progress of the report. When the report is ready, click Benchmark, which will appear underlined and in blue. Once this link is clicked, NYSIIS will display the benchmark report at the bottom of the Benchmark Report Status screen. In addition, you may do one of the following:
• Click the Export as Text link to display the report in text file format.
• Click the Export as a Spreadsheet link to display the report in a spreadsheet format.
• Click the Display as a PDF link to display the report in Adobe® Reader.

**Note:** The size of your file is not limited when you choose to export the benchmark report as text. However, to export as a spreadsheet, there is a limit of 65,535 lines. The information message “file not loaded completely” will display to indicate that part of the report was truncated. When the report is displayed as a PDF, the report will be limited to about 5,000 lines (119 pages); if the report is more than 5,000 lines, a red error report banner will display.

**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, choose whether you want to run the Immunization History Report or the Health Appraisal Form.

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.

![Group Patient Reports Request Status](image)

**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.

11. The system displays the report output in PDF format.

**Patient Reports**

For all patients in NYSIIS, you may generate the following reports from the Patient Reports Screen:

- Vaccine Administration Record
- Immunization History Report
- Immunizations Needed
- Health Appraisal Form
- Childcare Report

**Vaccine Administration Record**
The Vaccine Administration Record displays demographics, contact information, and immunization history for the selected patient. The responsible person’s and clinician’s signatures can also be collected on this form. 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.

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 NYSIIS chapter in this manual for more information on Adobe Reader®.
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 **Immunization History Report**, which is underlined and in blue text.
3. Once the report is generated, it will be displayed using Adobe Reader®. Refer to the Optimizing NYSIIS chapter in this manual for more information on Adobe Reader®.
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 NYSIIS chapter in this manual for more information on Adobe Reader®.

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 Back Button in the upper right corner of the Immunizations Needed Report window.
**Health Appraisal Form**

This form is modeled after the one recommended by the AAP (American Academy of Pediatrics). The Health Appraisal Form displays demographics, a blank physical examination report, and the patient’s immunization history for vaccinations required for New York State school entry. The patient’s demographic information and immunization history will be automatically populated by NYSIIS. All other fields on this report are a template and should be completed in writing. To generate the Health Appraisal Form for the patient, 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 Health Appraisal Form, which is underlined and in blue text.
3. Once the report is generated, it will be displayed using Adobe Reader®. Refer to the Optimizing NYSIIS chapter in this manual for more information on Adobe Reader®.

![Health Certificate / Appraisal Form](image-url)

<table>
<thead>
<tr>
<th>Name</th>
<th>Date of Birth</th>
<th>Address</th>
<th>School</th>
<th>Gender</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>IMMUZONIZATIONS / HEALTH HISTORY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

**Physical Exam**

<table>
<thead>
<tr>
<th>Weight</th>
<th>Height</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**EXAM ENTIRELY NORMAL**

<table>
<thead>
<tr>
<th>Turner</th>
<th>Roman</th>
<th>IV</th>
<th>V</th>
</tr>
</thead>
</table>

**Medications**

<table>
<thead>
<tr>
<th>Medications (if any)</th>
<th>None</th>
<th>Additional medications listed on reverse of form</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Phys. Education / Sports / Playground / Work Qualification / CSE Consideration</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Optimal Information (If Known)</th>
</tr>
</thead>
</table>

**Provider’s Signature**

<table>
<thead>
<tr>
<th>Phone</th>
<th>Office Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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 Health Appraisal Form window.

**Childcare Report**

The Childcare Report displays patient information, immunizations required for entry into daycare and a complete list of immunization history. This is the New York State Office of Children and Family Services: Medical Statement of Child in Childcare form (OCFS-LDSS-4433). 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 Childcare Report, which is underlined and in blue text.
3. Once the report is generated, it will be displayed using Adobe Reader®. Refer to the Optimizing NYSIIS chapter in this manual for more information on Adobe Reader®.
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 Childcare Report window.

Reminder/Recall

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.
**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 and Local County Public Health organizations. Users associated with these organizations can select patients based on their specific organization or that are residing in a specific county 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 the boxes to 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, 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:** NYSIIS 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, NYSIIS 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.

| Select the School & Primary Care Provider ...
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>School</td>
<td>Provider (PCP)</td>
</tr>
</tbody>
</table>

| Enter Additional Demographic Criteria ... |
|----------------|----------------|
| Cty            | Zip Code       |
|                 | County         |

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. Date Criteria

- Target Date Range: When a target date is specified, the report will include those patients that are due/overdue for immunizations within the date range. To choose a target date range, enter the beginning date in the “From” text box and the ending date in the “To” text box in MM/DD/YYYY format, or use the calendar icon to select the desired dates.
- These dates can range from the past to the future; therefore, you have the capability to run a recall, reminder, or a combination of the two.
- If either the “From” date or “To” date is unspecified for the Target Date Range, the system will use the date that you run the report for that field.

- If both the “From” and “To” dates are left blank, the system will find those patients who are due or overdue as of the date that you run the report.

- Birth Date Range: When a birth date range is specified, the report will return those patients who have a birth date that falls within the range entered. To choose a birth date range, enter the beginning date in the “From” text box and the ending date in the “To” text box in MM/DD/YYYY format, or use the calendar icons to select the desired dates.

- If the “From” date is unspecified for the Birth Date Range, the report will include the oldest patients in the system.

- If the “To” date is unspecified for the Birth Date Range, the system will use the date that you run the report for that field.

- 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.

  Enter the Date Criteria ...

  Target Date Range From To

  Birth Date Range From To

  Weeks Since Last Notice

  Exclude patients more than

  Exclude from

  Today’s Date

  Target From Date

  NOTE: If Target Date is blank, today’s date will be used.

- Exclude Patients More Than: To exclude patients who are overdue and who may have received several reminders already, provide a number of months from the drop down list provided.

- Exclude from: If excluding patients overdue for a certain number of months, indicate the date from which patients should be excluded; choose either the current date or the Target “From” Date (uses the date from the field at the top of the section) by clicking the appropriate radio button. If no target date information is entered, patients will be excluded from the date the report was run.
8. Sorting Criteria: This section allows you to specify how the data will be sorted. If a sort order is not specified, NYSIIS 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.

<table>
<thead>
<tr>
<th>Specify How to Sort the Report Data ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sort 1st By: Last Name</td>
</tr>
<tr>
<td>Sort 2nd By: First Name</td>
</tr>
<tr>
<td>Generate</td>
</tr>
</tbody>
</table>

- **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.
- **You may, if desired, complete additional ordering sequences for the second through fourth sorts.**

9. 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 NYSIIS 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 NYSIIS 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**

<table>
<thead>
<tr>
<th>Step</th>
<th>Criteria Evaluated at this Step</th>
<th>Patients</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Patients associated with Kyle's Immunization Clinic.</td>
<td>1,232</td>
</tr>
<tr>
<td>2</td>
<td>Patients immunized by Kyle's Immunization Clinic.</td>
<td>1,218</td>
</tr>
</tbody>
</table>
| 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. | 1,209    |
| 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 11/1/2009;  
  - Use at 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:

<table>
<thead>
<tr>
<th>Last Notice Date Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set last notice date to today for all eligible patients when you select a report output.</td>
</tr>
<tr>
<td>Prevent last notice date to previous last notice date for all Patients eligible for this reminder.</td>
</tr>
<tr>
<td>Prevent last notice date to previous last notice date for all patients immunized by Kyle's Immunization Clinic.</td>
</tr>
<tr>
<td>Return to the previous screen.</td>
</tr>
</tbody>
</table>

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:

1. Under the Additional Input column or the Letter section of the table, enter:

<table>
<thead>
<tr>
<th>Output</th>
<th>Description</th>
<th>Additional Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reminder Letter</td>
<td>Standard Reminder Letter</td>
<td>Report Name</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Free Text</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Phone #</td>
</tr>
</tbody>
</table>

- 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.

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 portions of NYSIIS 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.

**Mailing Labels**
The labels output option produces 30 labels per page on Avery Mailing Labels #5160. To generate mailing labels, follow these steps:

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 portions of NYSIIS 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.

**Patient Query Listings**
The Patient Query Listing displays contact information for those patients identified as being due/overdue in the Reminder/Recall output in a report format. This report lists every patient that was returned in the report query process. To generate a Patient Query Listing, complete the following steps:

1. Click on **Patient Query Listing**, 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 portions of NYSIIS 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®.

4. To print the report, 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.

Creating Custom Letters

In addition to the standard letter, NYSIIS 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.
1. **Immunization History:** Check the box to include the patient's immunization history in the letter.

2. **Paragraph 2:** Enter more text in this field, if desired.

3. **Immunization Recommendations:** Check this box to include the immunizations recommended for the patient in the letter.

4. **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 portions of NYSIIS 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.

   • 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®.

3. To print the letters, press the printer icon on the Adobe® toolbar. Press **OK** in the Print dialog box.

4. 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.

**Vaccines for Children (VFC) Reports**

The VFC Report details the number of patients that are vaccinated by your organization for each VFC eligibility type for a specified date range. To generate a VFC Report, follow these steps:

1. Click Request VFC Reports under the Reports section of the menu panel.
2. Select the organization name from the drop down list.
3. Enter a From date under the Report Date Range using the MM/DD/YYYY format.
4. Enter a To date under the Report Date Range using the MM/DD/YYYY format.
5. Choose a type of VFC Report to run. You have two choices:
   - The Age Group report displays a summary of doses by VFC eligibility and four specific age ranges: < 1 year of age, 1-6 years of age, 7-18 years of age, and older than 19 years.
   - The Vaccine Group report displays a summary of doses by VFC eligibility and vaccine groups.
   - If running the Vaccine Group report, the VFC By Vaccine Groups Request Status page is displayed. You may leave this page while the report is generated and return to it later by using the “vfc report status” link in the left menu panel. 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.
   - If running the Age Group report, it will open automatically in your browser window.
7. The form displays in Adobe® Reader.
8. To print the report, press the printer icon on the Adobe® toolbar.
9. Press OK in the Print dialog box.
10. To return to the Vaccines for Children Report Criteria screen, press the Back button on your browser.

Understanding the Vaccines for Children Report by Vaccine Group
The following section explains the rows and columns within the VFC report. The report only displays vaccines administered by your organization.

The VFC Report by Vaccine Group in NYSIIS is a required monthly report (Doses Administered) for the VFC Program.
The columns on the report break down the vaccines administered by VFC eligibility.

<table>
<thead>
<tr>
<th>Vaccine</th>
<th>VFC Eligible Doses Administered</th>
<th>Total # of VFC Eligible Doses Administered (V02, V03)</th>
<th>Total # of Non-VFC Eligible Doses Administered (V02, V01)</th>
<th>Total # of CHP Doses Administered (CH00)</th>
<th>Total # of Doses Given to Adults not in NY SHIS (V90)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hib-Mening</td>
<td>3.0</td>
<td>3.0</td>
<td>2.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Mening</td>
<td>1.0</td>
<td>1.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Td/Tdap</td>
<td>4.0</td>
<td>4.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Encephalitis</td>
<td>6.0</td>
<td>6.0</td>
<td>2.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Tetanus</td>
<td>3.0</td>
<td>3.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>DTP/P</td>
<td>2.0</td>
<td>2.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Flu H1N1-09</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>HepB-Hib</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Adeno</td>
<td>1.0</td>
<td>1.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Influenza</td>
<td>2.0</td>
<td>2.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>HPV</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Total</td>
<td>22.0</td>
<td>24.0</td>
<td>9.0</td>
<td>1.0</td>
<td>0.0</td>
</tr>
</tbody>
</table>

**Column** | **Description**
--- | ---
Vaccine | Lists the vaccines that were used by your organization during the date range entered for the report.

**Medicaid/Medicare** | Lists the number of immunizations with the VFC eligibility of “Medicaid/Medicare Managed Care”.

**Uninsured** | Lists the number of immunizations with the VFC eligibility of “Uninsured”.

**American Indian** | Lists the number of immunizations with the VFC eligibility of “American Indian/Alaskan Native”.

**Underinsured** | Lists the number of immunizations with the VFC eligibility of “Underinsured”.
<table>
<thead>
<tr>
<th>Sub column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total # of VFC Eligible</strong></td>
<td>The total count of VFC Eligible Immunization Doses Administered at your organization</td>
</tr>
<tr>
<td><strong>Total # of Non-VFC Eligible</strong></td>
<td>The total count of Non-VFC Eligible immunization Doses Administered at your organization.</td>
</tr>
<tr>
<td><strong>Total # of CHP Doses</strong></td>
<td>The total count of VFC Eligible immunizations administered to “Administered” patients participating in the “Child Health Plus program.”</td>
</tr>
<tr>
<td><strong>Total # Given to Adults</strong></td>
<td>The total count of inventory transactions with the code “Doses Given to Adults not in NYSIIS”</td>
</tr>
<tr>
<td><strong>Total by VFC Eligibility</strong></td>
<td>The total cells in the bottom row of the report represent the total count of immunizations for the given VFC eligibility.</td>
</tr>
</tbody>
</table>

**Understanding the Vaccines for Children Report by Age Group**

The following section explains the rows and columns within the VFC report. The report only displays vaccines administered by your organization.

The rows on the report break down the immunizations and patients by age in years. A patient who receives a vaccination when he or she is six years and 11 months old will be included in the 1-6 age group.

<table>
<thead>
<tr>
<th>Row</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 1</td>
<td>This row includes doses given to patients who were under one year of age at the</td>
</tr>
</tbody>
</table>
time the dose was administered.

1-6 This row includes doses given to patients who were from one to six years of age at the time the dose was administered.

7-18 This row includes doses given to patients who were from seven to 18 years of age at the time the dose was administered.

19+ This row includes doses given to patients who were 19 years of age or older at the time the dose was administered.

Annualized NYSIIS computes annualized estimates by using actual immunization and patient counts in each age group, applying a multiplier to estimate a yearly amount. For example, if a report was run for 01/01/2006 to 01/31/2006, the number in the annualized row will be roughly 12 times the actual counts.

The columns on the report break down the immunizations and patients by VFC eligibility.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>VFC Eligibility Unknown</td>
<td>The immunization’s VFC eligibility is “VFC Eligibility Unknown”.</td>
</tr>
<tr>
<td>Not VFC Eligible</td>
<td>The immunization’s VFC eligibility is “Not VFC Eligible”.</td>
</tr>
<tr>
<td>Medicaid/Medicare</td>
<td>The immunization’s VFC eligibility is “Medicaid/Medicare Managed Care”.</td>
</tr>
<tr>
<td>Uninsured</td>
<td>The immunization’s VFC eligibility is “Uninsured”.</td>
</tr>
<tr>
<td>American Indian</td>
<td>The immunization’s VFC eligibility is “American Indian/ Alaskan Native”.</td>
</tr>
<tr>
<td>Underinsured</td>
<td>The immunization’s VFC eligibility is “Underinsured”.</td>
</tr>
<tr>
<td>Child Health Plus</td>
<td>The immunization’s VFC eligibility is “Child Health Plus”.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sub columns</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Imms</td>
<td>This sub-column counts the number of immunizations given and records them based on the VFC eligibility category for the specified date range.</td>
</tr>
<tr>
<td>Distinct Patients</td>
<td>This sub-column counts the number of distinct patients associated with the immunizations given within each VFC eligibility category</td>
</tr>
</tbody>
</table>
for the specified date range. (ex. A single patient who received three doses would contribute +3 to the Imms column but only +1 to the Distinct Patients column.)

Totals include counts by VFC eligibility, age group, grand total and Doses Given to Adults not in NYSIIS.

<table>
<thead>
<tr>
<th>Total Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total by VFC Eligibility</td>
<td>The total cells in the bottom row of the report represent the total count of immunizations regardless of the age at which the dose was administered.</td>
</tr>
<tr>
<td>Sum of Immunizations</td>
<td>The second-to-last column of the report shows a count of the number of immunizations given in each age category, regardless of VFC eligibility.</td>
</tr>
<tr>
<td>Doses Given to Adults</td>
<td>The total number of inventory transactions with the code “Doses Given to Adults not in NYSIIS”.</td>
</tr>
</tbody>
</table>

**Vaccines for Children (VFC) Report Totals**
The VFC Report Totals provides summary totals of the VFC reports including totals number of immunizations given in NYSIIS and the total number of Doses Given to Adults not in NYSIIS.

To generate the report, follow these steps:

1. Click on the VFC Report Totals menu link under Reports on the menu panel.

2. Select an Organization Type from the drop down menu.

**Note:** If an organization type is not selected, all organizations will be totaled.

3. Enter a From date under the Report Date Range using the MM/DD/YYYY format.
4. Enter a To date under the Report Date Range using the MM/DD/YYYY format.
5. Click on the **Generate Report** button.
6. The totals display on the screen.

**Comprehensive Clinic Assessment Software Application (CoCASA) Extracts**

**Note:** This section of the user manual is only for users with role of Administrative User (Public Health) in NYSIIS.

The Comprehensive Clinic Assessment Software Application (CoCASA) is a tool provided by the Centers for Disease Control and Prevention (CDC) for assessing immunization practices within a clinic, private practice, or any other environment where immunizations are provided. NYSIIS is able to extract your organization’s immunization information and save it in a format that may be used to import into CoCASA for analysis. Administrative (Public Health) users must gain Soft-access to the specific organization prior to running the CoCASA extract. For instructions on gaining Soft-access, please refer to the AFIX/CoCASA Training Handout. To perform an extract of information for CoCASA, follow these steps:

1. Click on the CoCASA Extract menu item under Reports on the menu panel.

![Enter Common Review Date & Age Ranges for CASA Extract]

2. Enter a Common Review Date in the MM/DD/YYYY format or click on the calendar icon to set the date. This date is known as the “as of” date in CoCASA.

3. Enter the minimum age the patient must be on the common review date by entering a number and choosing days, months or years from the drop down list. This field defaults to 0 months.

4. Enter the age the patient must be under on the common review date by entering a number and choosing days, months, or years from the drop down list. This field defaults to 36 months.

5. If a city or county organization, choose the appropriate radio button to report on (this section is not available for private organizations):
   - Only those patients associated with your organization.
• Only the patients within your city or county.
• Both patients within your organization and in your city or county.

If you choose the second or third radio button, select the desired city or county(s) by double clicking a county name or by highlighting a chosen county and pressing Add. Do this for each city or county desired.

Note: Only county organizations running an extract on themselves would have the county option. Otherwise, Administrative (Public Health) users can only run the extract on the active patients for the organization that they are soft accessing.

6. Press OK.
7. A screen will display instructing you to check the status of the extract by going to the Check Request Status screen.
8. Click on Check Request Status under Reports on the menu panel. You may click the Refresh button at any time to update the status of the report. You have the option of moving to other portions of NYSIIS or using other functions of your computer while you are waiting for your download to process. To return to check the progress of your download, click Check Request Status on the menu panel.

When your extract is complete, it will appear in the status table underlined and in blue text.

9. Double click the name of the underlined CoCASA file. In the File Download box, press RUN.

You may get a security warning from Internet Explorer. If the security window pops up, press
**RUN** again. Your extract file will save on your computer’s desk top. It will be named cocasa ###.txt and stored as a text document.

**Importing a Text File into CoCASA**

To import your text file into the CoCASA program, follow these steps:
1. Open your CoCASA program.
2. Select Import from the File menu, then select Import Using Template.

3. In the template window, choose “New York – NYSIIS” from the scroll-down list. Press **OK**. Your import fields will automatically populate on the template screen.

4. In the Age Range section of the import window, enter the same age range that you used in NYSIIS when creating your extract. Make sure to click the correct radio button for months or years. Also, be sure to enter the correct date in the “as of” field. This date will be the Common Review Date you entered into NYSIIS when you created your extract.

5. Next, at the File Name field, click **Browse** to locate your newly created CoCASA text file.
6. Lastly, name the assessment in the assessment field at the bottom of the screen, then click the **Import** button
   a. LHD’s should name the assessment the same way you would normally name any other assessment in CoCASA: county# - last 2 #s for the year-org name (e.g., (21-09-Healthy Peds)
   b. Some records may not be able to import into CoCASA because of errors in NYSIIS data entry or because CoCASA does not accept it (ex. Synagis). If there are any errors during importing, an error report will generate for your viewing in text file format. To identify the vaccines rejected, refer to the CVX code list maintained by the National Center for Immunization and Respiratory Diseases (NCIRD).

   [http://www.cdc.gov/vaccines/programs/iis/stds/cvx.htm](http://www.cdc.gov/vaccines/programs/iis/stds/cvx.htm)

7. Click the **Close** button to exit the import window. You now are able to select the assessment you have uploaded from NYSIIS and run CoCASA reports as you normally would.

---

**Note:** CoCASA extracts may take more than 20 minutes to download, depending on the size of your organization. Instead of waiting on the status screen for the download to complete, you may work with other features in NYSIIS and even log out while the file is downloading. To return to the status screen, press Check Request Status.
Blood Lead Reports

Aggregate Clinical Performance Report

The clinical performance report returns the number and percentage of patients less than six years of age who have had a blood lead test(s) according to the selected criteria and time frame. In rare instances, a child’s record may need manual review by NYSDOH before it is matched into NYSIIS and available for a report.

To generate an Aggregate Clinical Performance Report, follow these steps:

1. Select Performance Report under the Blood Lead menu group.
2. Select the report criteria
3. Select a Time Frame.
   a. For a year, select a time increment of a year and pick the year.
   b. For quarters, select a time increment of a quarter, pick the year, and pick the range of quarters.
   c. For months, select a time increment of a month, pick the year, and pick the range of months.
4. Select a Birth Year (optional).
5. Generate the report
6. The Lead Performance Reports Request Screen will appear

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Started</th>
<th>Completed</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Yr Old, 2012</td>
<td>05/07/2013 02:17 pm</td>
<td></td>
<td>20%</td>
</tr>
</tbody>
</table>

7. Select under report name the report that you want and the report will open in a spreadsheet format.
8. Print, save, or make changes to the report.

Aggregate Clinical Performance Report
3 Yr Old, mo. 10 to 10, 2011, assoc. w/ IR Physicians OR res. Albany Co.
11/24/11 4:20 PM
IR Physicians, 2

<table>
<thead>
<tr>
<th>Health Plan</th>
<th># in Age Range</th>
<th># Met Criteria</th>
<th>% Met Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tina’s Health Plan</td>
<td>1</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>TEST - HMO (flat)</td>
<td>1</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>Dean Health Plan</td>
<td>1</td>
<td>0</td>
<td>0.00%</td>
</tr>
</tbody>
</table>
**Test Due List Report**

The test due report is populated with NYSIIS data according to the selected criteria and time frame up to the date selected. Results are sorted in a chronological order by date of birth, with the oldest child first. In rare instances, a child’s record may require manual review by the NYSDOH before it is matched into NYSIIS and available for a report.

To generate a Test Due report, follow these steps:
1. Select Test Due List Report under the Blood Lead menu group.
2. Select the report criteria (looking for tests due at either age one year or two years)
3. Select a Time Frame (anywhere from today to the next 90 days)
4. Generate the report
5. The Lead Test Due Reports Request Screen will appear
6. Select under report name the report that you want and the report will open in a spreadsheet format.

7. Print, save, or make changes to the report.

Follow Up Action Needed List Report

Populated with NYSIIS data according to the selected criteria up to the date the report is generated. In rare instances, a child's record may require manual review by the NYSDOH before it is matched into NYSIIS and available for a report.

To generate a Follow Up Report, follow these steps:
1. Select Follow Up Report under the Blood Lead menu group.
2. Select the report criteria
3. Select an Age Range
4. Generate the report
5. The Lead Follow Up Reports Request Status Screen will appear
6. Select under report name the report that you want and the report will open in a spreadsheet format.
7. Print, save, or make changes to the report.

Maximum Age Exceeded List Report
Are populated with NYSIIS data according to the selected criteria and time frame up to the date selected. The user may select a previous date if desired. Results are sorted in a chronological order by date of birth, with the oldest child first. In rare instances, a child's record may require manual review by the NYSDOH before it is matched into NYSIIS and may be included on one of the reports as not being tested.

To generate an Age Exceeded Report, follow these steps:
1. Select Age Exceeded Report under the Blood Lead menu group.
2. Select the report criteria
3. Select a Date, if Date is blank, today's date will be used
4. Generate the report
5. The Lead Max Age Exceeded Reports Request Screen will appear

6. Select under report name the report that you want and the report will open in a spreadsheet format.
7. Print, save, or make changes to the report.

Maximum Age Exceeded List Report
No One Year, 03/01/2010, assoc. w/ IR Physicians
11/24/2011
IR Physicians, 2

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Birth Date</th>
<th>Responsible Person</th>
<th>Primary Phone</th>
<th>Street Address</th>
<th>City</th>
<th>ST</th>
<th>Zip</th>
<th>County</th>
<th>Health Plan</th>
<th>Provider Organization</th>
<th>ID</th>
<th>Provider Street Address</th>
<th>Provider City</th>
<th>ST</th>
<th>Zip</th>
<th>Provider Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>BHARMAPURI PAT</td>
<td>03/01/2004</td>
<td>152 ABENG WADING RIVER NY 152</td>
<td>Child</td>
<td>(102) 455-8666</td>
<td>Wingway Drive ESSEX NY 01235</td>
<td>(102) 455-8666</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CHEN LYDIA</td>
<td>03/01/2004</td>
<td>183 JOHNSON MILTON NY 12031</td>
<td>Schoharie IR Physicians 2</td>
<td>Bridge Road MADISON NY 12237</td>
<td>Bridge Road MADISON NY 12237</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DARCY ALEXANDRA</td>
<td>03/01/2004</td>
<td>366 ATWOOD ROCHESTER NY 13640</td>
<td>Jefferson IR Physicians 2</td>
<td>Bridge Road MADISON NY 12237</td>
<td>Bridge Road MADISON NY 12237</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Temperature Log Reports

The Temp Log Report will display a PDF or spreadsheet format of your organization’s temperature readings. The following Temperature Log report options are available:

- Standard Temp Log Report – A list of temp log records your refrigerator/freezers.
- Out of Range Aggregate – A list of “Out of Range” temp log records.
- Compliance Aggregate – A list of temp log recording opportunities and the percentage of times when a recording was entered.

To access the Temp Log Reports, click on Temp Log Report under the Reports section of the menu panel. The Temp Log Report screen displays:

Standard Temp Log Report

The Standard Temp Log report displays daily temp log records for each active refrigerator or freezer unit, within a specified date range. To generate a Standard Temp Log Report, follow these steps:

1. Your organization name is displayed in the “Organization” dropdown list by default.
2. If you are running a report for your own organization, leave the “Select by county or region” and “Select Multiple Organizations” boxes unchecked. Some users may be authorized to run reports with these features.
3. Click the “Standard Temp Log Report” radio button as the Report Type.
4. Click either the “PDF” or “Spreadsheet” radio button to choose your File Type.
5. Enter the report Date Range by typing start and end dates into the “From” and “To” fields,
in the format of MM/DD/YYYY. Or click on the calendar icon  to select the dates.

6. Click View to generate report.

**Note:** If no temp log records are found for your selected date range, the report will display a message of “No Record”.

---

### Out of Range Report

The Out of Range report displays temp log records with an “Out of Range” value, within a specified date range. To generate an Out of Range Report, follow these steps:

1. Your organization name is displayed in the “Organization” dropdown list by default.
2. If you are running a report for your own organization, leave the “Select by county or region” and “Select Multiple Organizations” boxes unchecked. Some users may be authorized to run reports with these features.
3. Click the “Out of Range Report *Aggregate” radio button as the Report Type.
4. Click either the “PDF” or “Spreadsheet” radio button to choose your File Type.
5. Enter the report Date Range by typing start and end dates into the “From” and “To” fields, in the format of MM/DD/YYYY. Or click on the calendar icon  to select the dates.
6. Click View to generate report.

**Note:** If no temp log records are found for your selected date range, the report will display a message of “No Record”. 
Compliance Report

The Compliance Report will show the rate at which your organization records temperature readings, displayed as a percentage. This is based on the number of temp log records in NYSIIS, compared to the number of recording opportunities for your specified date range. To generate an Compliance Report, follow these steps:

1. Your organization name is displayed in the “Organization” dropdown list by default.
2. If you are running a report for your own organization, leave the “Select by county or region” and “Select Multiple Organizations” boxes unchecked. Some users may be authorized to run reports with these features.
3. Click the “Compliance Report *Aggregate” radio button as the Report Type.
4. Click either the “PDF” or “Spreadsheet” radio button to choose your File Type.
5. Enter the report Date Range by typing start and end dates into the “From” and “To” fields, in the format of MM/DD/YYYY. Or click on the calendar icon to select the dates.
6. Click to generate report.

Note: If no temp log records are found for your selected date range, the report will display a message of “No Record”.

Notes:
The # of Recording Opportunities value is calculated using the total number of days within the date range selected, then multiplied by 2 (for am/pm readings), and minus any opportunities marked as “Office Closed”.

Billing Export Request
The Billing Export Request allows Organizations to export billing information for claims process purposes. Organizations must be set up by NYSIIS helpdesk to initiate Billing Information data entry, and thus the function of this link. To generate a Billing Export, follow these steps:

1. Select Billing Export Request under the Reports menu
2. The Billing Export Request screen is displayed:

3. Select the Vaccine Groups you require
4. Select an Immunization Date Range or Birth Date Range
5. Select the Insurer and Insurer Type
6. Select the Already Exported option.
   a. To export immunizations that have been exported at least once, choose Yes.
   b. To export immunizations that have never been exported, choose No.
   c. To export all immunizations regardless of previous export status, choose All.
7. Select Generate button

The Billing Export Request Status screen will display:

1. Click Refresh button until Status reaches 100%
2. Once status is 100%, click blue date hyperlink to open or save the file.
4. The billing export is a .csv file. The data in this file:
   - Is exported in all uppercase letters
   - Consists of individual immunization records that are each separated by a carriage return and sorted alphabetically by Patient Last Name
   - Consists of comma-separated fields that can be referenced in Appendix A of this document for field order
Data Exchange

In this chapter:

Data Exchange Through NYSIIS
Health Plan Data Exchange
Data Exchange Through NYSIIS

The data exchange feature of NYSIIS gives you the capability to exchange immunization data files. Only NYSIIS users with the role of "MCO Data Exchange," or "Admin User" 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 NYSIIS staff must be contacted to arrange for testing either a Health Level 7 (HL7) or a Flat File that your organization will be sending.

Please note that the flat file format is currently only available for Health Plan Organizations or for provider organizations that are associated with vendors who previously completed testing for flat file submissions. No new vendors or provider offices will be able to submit via flat file as of January 2014.

NYSIIS prefers to work with the vendor or technical contact to test the file format first. Once that testing is complete, NYSIIS will run a test with each provider organization to ensure the provider organization itself is set up correctly in NYSIIS and is able to upload data into the system.

Creating a test file for Data Exchange

1. Contact NYSIIS Help Desk (1-866-389-0371) to receive the most up to date version of the data exchange file specifications.

2. First step in testing is to submit a test message to the Message Conformance NYSIIS test application in the Health Commerce System.
   - Sign into the Health Commerce system (HCS) using your secure User ID and password.
   - Click on the ‘Applications’ tab
   - Select “M”
   - Select “Message Conformance Application NYSIIS”
   - Complete the necessary information regarding your office and EHR vendor
   - Upload a test message – please remember to upload a single message only for this test
   - A detailed report will be generated for your review. This report will include information on any errors that are found in the file. This information should be shared with your vendor.
   - Once you have passed this test you may proceed to step 3.

3. Send NYSIIS staff a hypothetical sample file of at least 5-10 patient records. Include in this file a range of sample immunizations per "patient". NYSIIS 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 and mandated fields, please let NYSIIS staff know that as well.

• Review code tables carefully, paying particular attention to spelling and to codes that are only valid during specific time periods or age groups.

4. 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.

5. Once the file format has been tested and found to be correct, request that each of your provider organizations contact the NYSIIS Help Desk (1-866-389-0371) to set up data exchange. The Help Desk will walk the data exchange representative from each office through the steps for data upload and explain the response files that are created.

• Please note if you have offices that wish to submit data as a group (in a parent/child format) then NYSIIS will need to be informed prior to the first submission so that the appropriate associations may be made within the NYSIIS system.

  i. An additional test file may also be requested when submitting in the parent/child format to ensure that patient information will be properly associated with the correct participating organization.

Setting up your organization for Data Exchange

In order to set up your organization for Data Exchange you must call the NYSIIS Help Desk and provide them with the following information:

• The name of your provider organization or Health Plan.
• The name of your vendor (EMR, Billing, Third Party)
• File format type : Indicate Health Level 7 (HL7) version Flat File or Health Plan query.

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 NYSIIS Help Desk (1-866-389-0371) will assist you with your first data exchange. This file will be sent into NYSIIS 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 NYSIIS, it will be reviewed by your organization and the NYSIIS Help Desk. If both parties agree that the Data Exchange was successful, then your organization will continue sending data into the NYSIIS 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, NYSIIS will use the current date for a job name.
   - **HL7 File Name**: This field is required for users who are exchanging data using the HL7 file format. Click Browse to select the HL7 file you wish to upload.

**Note:** If you are using the previously accepted method of data exchange via flat file you will see the following fields:

- **Patient File Name**: This field is required if your file format is Flat File. Click Browse; to select the appropriate Patient File Name.
- **Immunization File Name**: This field is required if your file format is Flat File. Click Browse to select the appropriate Immunization File Name.
- **Comment File Name**: This optional field will appear if you exchange data via Flat File format. Click Browse to select the appropriate Immunization File Name

2. Click 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 NYSIIS" data directions and will confirm or provide the job name to the user.

4. Click ‘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.

6. Click ‘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.
   - **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 all output files available for you to download, including the Response Files and any "NYSIIS 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, 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 NYSIIS to process the file. All fields that are in BOLD lettering are required by New York State Legislation for immunizations administered after January 1, 2008, and need to be submitted to NYSIIS.

Note: If your system is not capable of exporting any of the fields mandated by New York State Legislation (Public Health Law 2168), it is required that this information be subsequently added through the user interface to complete the record.
**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:**    |               |
| **Consent to Share:**   |               |
| **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 NYSIIS 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

NDC Number: If sending NDC it must be sent in conjunction with CVX - 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:**

Provider Name:

Administered By Name:

Site Name:

Sending Organization: (this is your NYSIIS organization ID): This field is REQUIRED if an organization other than the organization that owns the record(s) is transmitting the data

VFC Eligibility (Financial Class):

Vaccine Purchased With (Funding Type):

### Comment Information

**Record Identifier:**

**Comment Code:**

Applies to Date MMDDYYYY:
**Health Plan Data Exchange**

All Health Plan organizations will need to complete the same testing of their data file format as outlined above for provider organizations and EMRs. Prior to performing an Health Plan data exchange, your Health Plan organization will need to contact the NYSIIS Help Desk and arrange for your organization to be set up to perform data exchange.

You will need to provide the following information regarding the exchange:

- **File format**: Requires Flat File.
- **Type of transmission**: Indicate whether the exchange will be a test or an actual production transfer.

To perform a Health Plan 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, NYSIIS will use the current date for a job name.
   - **For Health Plan Data Submissions**
     - Patient File Name: This field is required, as the file format is Flat File. Click Browse to select the appropriate Patient File Name.
     - Immunization File Name: This optional field will appear if you exchange data via Flat File format. Health Plans 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 Health Plan Query Submissions**
     - Query File Name: This field is required for users who are running an HMO query. Click 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 Health Plan Organization has submitted patient data into NYSIIS. Only patients that are shown to be affiliated to a Health Plan organization will be returned to the Health Plan via a data query.
2. Click 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. Click 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.

6. Click **Refresh** periodically to check the status of the job.

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:
   - **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, the following will display:
   - **Response File**: Contains summary information for the Health Plan Data submission, including # of records processed, accepted, pended, or rejected. It also contains error messages for any data records that could not be successfully processed. This information is available for download by clicking on the underlined file name.
   - **Inbound Patient File**: Contains a copy of the patient data flat file that was submitted for this job. It is available for download by clicking on the underlined file name.

For jobs created using the Submit HMO Query menu option, the following files display:
   - **Outbound Demographic File**: This file contains the patient demographic file available for you to download. Click on the blue, underlined 'Outbound Demographic File' to download the file.
   - **Outbound Immunization File**: This file contains the immunization information for the patients accepted for the query (as contained in the above demographic file). Click on the blue 'Outbound Immunization File' to download the file. If patients were rejected they will show on the exception file, below.
   - **Exception File**: This file contains all the patient exceptions, where there was not a unique match available in the NYSIIS system, or if the patient was not found in the database, or if the patient was over 19 years old and non-consented, or if the patient had no immunizations to be returned. Click on the blue 'Exception File' to download.
   - **Inbound Query File**: This file contains a copy of the Query flat file that was submitted for this job. It is available for download by clicking on the blue underlined 'Inbound Query File'.
10. If the job did not process 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).

### Health Plan Query Format

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Record Identifier</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Last Name</th>
<th>Birth Date</th>
</tr>
</thead>
</table>

### Health Plan Query Result File Formats

#### Demographic

<table>
<thead>
<tr>
<th>Patient Id (Chart Number)</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Last Name</th>
<th>Birth Date</th>
</tr>
</thead>
</table>

#### Immunization

<table>
<thead>
<tr>
<th>Patient Id (Chart Number)</th>
<th>CPT</th>
<th>Vaccine Group</th>
<th>Administered Date</th>
<th>Filler</th>
</tr>
</thead>
</table>

#### Exception

<table>
<thead>
<tr>
<th>Patient Id (Chart Number)</th>
<th>Record Type</th>
<th>Error Message</th>
</tr>
</thead>
</table>
School and Camp User

In this chapter:

Finding Student Screen
Student Immunization History Screen
Manage School List Screen
Report and Student List Screen
Check School Report
Finding Camper Screen
Camper Immunization History Screen
Manage Camp List Screen
Report and Camper List Screen
Check Camp Report
School Users

Finding Student Screen

The Find Student screen is used to search and locate any school student existing in the NYSIIS 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 NYSIIS.
- Student Name
- Mother's Name
- Birth Date
- Gender
- Phone Number

Student Name Search

In order to locate a student in NYSIIS 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 NYSIIS, using it in your search will not produce a match.

---

**Note:** For quicker, more precise searches, entire Last Names and First Names should be used whenever available. The middle name will not function if used with any criteria other than first and last name.

---

**Mother’s Name Search**

In order to locate a student in NYSIIS 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.

**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 NYSIIS 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 NYSIIS to hit the threshold limit.
Gender Search
The Gender Search can only be used in helping to locate a student in NYSIIS 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 NYSIIS 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 NYSIIS 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, NYSIIS may find multiple possible 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 selected tracking 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 three main sections used in the **Student Immunization History** screen.

- Student Information
- Student Immunization History
- Recommended Vaccinations

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**Student Immunization History Screen**

![Image of the Student Immunization History Screen]

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Although routine risk assessment based blood lead testing is not required for children either less than 6 months of age or those 6 years and older, health care providers may choose to test children at any age for blood lead based upon their assessment of the child’s risk.

* Click here to review the NYSDOH Guidelines for the Identification and Management of Lead Exposure in Children*
**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.

The **Tracking Schedule** drop down box is used to choose the tracking schedule that will evaluate the student’s immunization history and recommendations. This selected schedule will be used when viewing or printing the student’s information.

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**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.

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**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.

**Date Administered**: 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.

**Vaccine [Trade Name]**: This column displays the vaccine and trade name of the vaccination received.
Dose: This column indicates whether full, half or multiple doses were administered to the student.

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.

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 Recommended By Selected Tracking Schedule'. 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:

- **Vaccine Group**: This column gives the vaccine group name.
- **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.
- **Overdue 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 shaded with color for emphasis. The colors applied to the dates within the columns are defined as follows:

- **Yellow** will only be applied to those dates in the **Earliest Date** column. Yellow shading indicates that today’s date is equal to or past the earliest date, and is before the recommended date. Therefore, the student could receive the immunization now.

- **Green** will only be applied to those dates in the **Recommended Date** column. Green shading indicates that today’s date is equal to or past the recommended date, and is before the overdue date. Therefore the immunization is recommended to be administered now.

- **Blue** will only be applied to those dates in the **Overdue Date** column. Blue shading indicates that today’s date is equal to or past the overdue date and before the latest date. Therefore the patient is overdue for the immunization and should receive it as soon as possible.

- **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.
Information about printing an immunization record

The **Student Immunization History** screen displays the information held in the NYSIIS 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 a NYSIIS system function, but rather a function of Internet Explorer and Netscape.

Due to security issues, to correctly print the screen simply follow the steps below:

1. Click on File>Page Setup
2. Look at the ‘Footer’ section of ‘Headers and Footers’, remove any entry or “code” in the ‘Footer’ field.
3. In Netscape look at the Header section, remove the checkmarks for “Document Title” and “Document Location (URL)”.
4. Click Ok. Now you are ready to print.
5. Open up the Student record you want to print, click on the Print button in NYSIIS (under the Add button).
6. Once the record comes up in the print window, click on the print icon or File>Print in your browser.

**Note:** This setting should remain on your computer but you may have to change it on others.

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

<table>
<thead>
<tr>
<th>List Name</th>
<th>Last Updated Date</th>
<th>Student Count</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Grade List #1</td>
<td>03/02/2009</td>
<td>7</td>
<td>Delete</td>
</tr>
<tr>
<td>class of 2016</td>
<td>03/02/2009</td>
<td>0</td>
<td>Delete</td>
</tr>
<tr>
<td>9th grade students</td>
<td>03/02/2009</td>
<td>3</td>
<td>Delete</td>
</tr>
<tr>
<td>Kindergarten List #1</td>
<td>03/02/2009</td>
<td>10</td>
<td>Delete</td>
</tr>
<tr>
<td>class of 2015</td>
<td>03/02/2009</td>
<td>1</td>
<td>Delete</td>
</tr>
<tr>
<td>Pre-School List</td>
<td>03/02/2009</td>
<td>4</td>
<td>Delete</td>
</tr>
</tbody>
</table>
Manage List: This section is used to add new lists to your school organization in NYSIIS. 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 NYSIIS 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: Class of 2015. You will later add students to this list.

Note: Once you create a list, you cannot edit the name of it. Make sure to choose a list name that will not need to be revised (avoid generic names or current references).

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.
Removing a 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.

Report and 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
- Select Tracking Schedule
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.

Selecting Dates
Date criteria can be entered as a Target Date Range as described below.

Target Date Range
When these dates are specified, the report will only return those students that were, are, or will be overdue for the selected vaccine groups on a date falling within the target date range entered.
2. Enter the Target Date Range in the “From” and “To” text boxes in the form MM/DD/YYYY, or click on the calendar icon to set the date.

- For either date range, the “From” date, “To” date, or both dates can be left unspecified, described as follows:

- If the “To” date is unspecified for the Target Date Range, the report date range will include the “From” date up to and including today’s date. If both dates are left unspecified for the Target Date Range, then today’s date will be entered for both “From” and “To” fields.

3. Click on Generate

4. 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

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 latest 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 with at least one student, it will then 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 NYSIIS database.

You do not have to remain on this screen while the reports are running. You can navigate away from this screen and go somewhere else in the application while your report runs in the background. To get 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 'Ready', it has completed processing and is ready for viewing. To view the report, simply click on the desired report name hyperlink. (This process can take some time depending on the size of the report) The selected report will automatically be displayed using the Adobe Acrobat Reader. If there is a problem viewing your report please contact the NYSIIS Help Desk.

At any time, click the CANCEL button to return to the screen you were previously on.
Camp Users

Find Camper Screen

The Find Camper screen is used to search and locate any camper existing in the NYSIIS application using predetermined sets of search criteria.

There are two main sections used in the Find Camper screen.
- Enter Search Criteria for a Camper
- Search Results

Search Criteria

Listed below are the main items used to search for a camper in NYSIIS.
- Camper Name
- Mother's Name
- Birth Date
- Gender
- Phone Number

Camper Name Search

In order to locate a camper in NYSIIS using his or her name, a certain portion of each of the camper'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 camper'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 camper'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 camper's last or first name or both. If the patient does not have a middle initial recorded in NYSIIS, using it in your search will not produce a match.

**Note:** For quicker, more precise searches, entire Last Names and First Names should be used whenever available. The middle name will not function if used with any criteria other than first and last name.

**Mother’s Name Search**

In order to locate a camper in NYSIIS 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 Camper Name Search.

**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 camper in NYSIIS 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 campers 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 campers born on that particular day which will cause NYSIIS to hit the threshold limit.
Gender Search
The Gender Search can only be used in helping to locate a camper in NYSIIS 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 camper in NYSIIS 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 campers 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 Camper Match - An Exact Camper Match means NYSIIS returned only one camper. When this occurs, the Camper Immunization History screen is displayed containing all of the relevant information regarding the camper. An Exact Camper Match will usually occur when the search criteria entered contains information inherently specific to a particular camper.

List of Possible Matches
A List of Possible Matches means the search returned more than one and less than or equal to 75 possible camper matches. All possible camper matches returned are then displayed in a table. The camper result table is sorted alphabetically by Last Name. Middle name, birth date and gender are also included in the table for each camper. Using the information displayed for each of the campers in the table, the camper can be selected by clicking on the Last Name. The Camper Immunization History screen is then displayed containing all relevant information regarding the camper selected.

Threshold Limit
When executing a search in the database, NYSIIS may find multiple possible matches from the search criteria entered. If the number of campers exceeds 75 available matches, then no campers will be listed for further selection. Instead, the following message will display:

"XX campers were found. Please refine your search criteria to limit your camper list."
(Where XX is the total number of campers found in the search.)

This threshold limit occurs to restrict the extremely long lists of possible campers.
In the event a threshold limit is encountered while executing a camper search, the scope of the search must be narrowed. Revisit the search criterion that was previously used, and add additional information available for the camper. Be sure to observe the search criteria restrictions listed above in the Camper Search Criteria section.

Camper Immunization History Screen

The Camper Immunization History screen displays a camper's immunization history and provides immunization recommendations based on the selected tracking schedule. From this screen, you are also able to select and add the camper to a specific camper list. This will allow you to run reports for that camper.

There are three main sections used in the Camper Immunization History screen.

- Camper Information
- Camper Immunization History
- Recommended Vaccinations
Camper Information

The Camper Immunization History screen displays a camper information header at the top of the page. This header includes camper name, selected tracking schedule, as well as other camper-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 camper, especially if you have made an exact match and were directed to the Camper Immunization History screen following a camper search.

The Tracking Schedule drop down box is used to choose the tracking schedule that will evaluate the camper’s immunization history and recommendations. This selected schedule will be used when viewing or printing the camper’s information.

Adding Campers to Report List

To add a camper to a list, you must have first created specific camper 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 camper to a Report List” hyperlink.
- Once a camper has been added to a list, the camper cannot be added to the same list again until removed from that list. The camper can however be added to more than one list.

Camper Immunization History

The Camper Immunization History table lists all vaccinations the selected camper 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.

Date Administered: This column gives the actual day the camper was given the vaccine.

Series: Validates vaccine administration per the ACIP schedule and denotes the sequence number within the immunization series.

Vaccine [Trade Name]: This column displays the vaccine and trade name of the vaccination received.
**Dose:** This column indicates whether full, half or multiple doses were administered to the camper.

**Reaction:** If this column indicates “Yes” and appears in red, it means a reaction to a vaccine was recorded. To view the camper’s reaction, click on the “Yes” link in the Reaction column.

**Note:** The camper's age shows in a solid blue field between the camper immunization history and before the recommendations.

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**Recommended Vaccinations**

The recommended vaccinations and corresponding dates for the selected camper reside in a table titled ‘Vaccines Recommended By Selected Tracking Schedule’. The vaccine group list appearing in this table represents all vaccinations included in the tracking schedule assigned to this camper. The table columns are defined as follows:

- **Vaccine Group:** This column gives the vaccine group name.
- **Earliest Date:** This column displays dates which note the earliest date the camper could receive the corresponding immunization.
- **Recommended Date:** This column displays dates which note the date that the camper is recommended to receive the corresponding immunization.
- **Overdue Date:** This column displays dates which note the date that the camper is past due for the corresponding immunization.

The dates found in the **Vaccines Recommended by Selected Tracking Schedule** table can be shaded with color for emphasis. The colors applied to the dates within the columns are defined as follows:

- **Yellow** will only be applied to those dates in the **Earliest Date** column. Yellow shading indicates that today’s date is equal to or past the earliest date, and is before the recommended date. Therefore, the camper could receive the immunization now.

- **Green** will only be applied to those dates in the **Recommended Date** column. Green shading indicates that today’s date is equal to or past the recommended date, and is before the overdue date. Therefore the immunization is recommended to be administered now.

- **Blue** will only be applied to those dates in the **Overdue Date** column. Blue shading indicates that today’s date is equal to or past the overdue date and before the latest date. Therefore the patient is overdue for the immunization and should receive it as soon as possible.
**Maximum Age Exceeded** Reflects whether a camper has exceeded the maximum age to receive a specific vaccine. For instance, if a camper has already reached the age of 5 and hasn't completed the Pneumococcal series, then the recommendation for Pneumococcal at the bottom of the camper 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.

**Information about printing an immunization record**
The Camper Immunization History screen displays the information held in the NYSIIS database for the selected camper. 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 a NYSIIS system function, but rather a function of Internet Explorer and Netscape.
Due to security issues, to correctly print the screen simply follow the steps below:
2. Click on File>Page Setup
2. Look at the ‘Footer’ section of ‘Headers and Footers’, remove any entry or “code” in the ‘Footer’ field.
3. In Netscape look at the Header section, remove the checkmarks for “Document Title” and “Document Location (URL)”.
4. Click Ok. Now you are ready to print.
5. Open up the Camper record you want to print, click on the Print button in NYSIIS (under the Add button).
6. Once the record comes up in the print window, click on the print icon or File>Print in your browser.

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**Note:** This setting should remain on your computer but you may have to change it on others.

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**Manage List Screen**
The Manage List screen is used to create new and manage existing camper lists to be used for reporting purposes. A maximum of ten lists can be created by each camp. 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 camp organization in NYSIIS. 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 NYSIIS by the camp 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 campers within the list on the Detail List screen.

Last Updated Date: This column displays the date the list was last updated.

Camper Count: This column denotes the count of campers within the particular list. The count is determined by how many campers 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 campers from the list.

Creating a New Camper List
4. Enter a name in the ‘New List Name’ text field.
5. Next click the Save button and the list name will be added.
6. The message will appear at the top, “The list has been created successfully.” An example of a list name may be: Summer of 2015. You will later add campers to this list.

Note: Once you create a list, you cannot edit the name of it. Make sure to choose a list name that will not need to be revised (avoid generic names or current references).
Opening the Report/Camper List Screen
1. Click on a list name for the list you wish to view.
2. You will be taken to the Report/Camper List screen where you can view your camper list. Further explanation can be found on the Report/Camper List section.

Removing a 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.

Report and Camper List Screen
The Report/Camper List screen is used to view campers added to your camp list, and run reports for the campers in the list. You can also view a camper's history and remove a camper from your list.

There are two main sections used in the Report/Camper List screen:
- Camper List
- Reports Available for Camps
Camper List
This section is for viewing camper immunization history, and to remove a camper from your list. Information contained within the camper list table is described below.

Delete: If you wish to remove a camper from your list, place a checkmark in the box beside the camper’s name in the Delete column. You can remove as many campers as you like at one time by checking multiple campers. Next, click on the Delete button. Once you have confirmed the delete, a message will display: "The list has been updated successfully" and your camper(s) will be removed.

Last Name: This displays the camper’s last name and provides a link back to the Camper Immunization History screen.
First Name: This field displays the camper’s first name.
Middle Name: This field displays the camper’s middle name.
Birth Date: This field displays the camper’s date of birth.

Reports Available for Camps
This section provides three camper reports within the list:

Camper List: This report displays the name and date of birth for each camper on the list sorted alphabetically by last name.
Camper Immunization History List: This report displays the name, date of birth and immunization history for each camper on the list sorted alphabetically by last name.

Generating the Camper List Report
1. Click on the Camper List link.
2. The camper list report will open in a pdf document.

Generating the Camper Immunization History List Report
1. Click on the Camper Immunization History List link. You will be taken to the Check Camp 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 camper on your list.
Check Camp Report Screen

The Check Camp Report screen is used to display and/or determine the status of a report request. The screen is separated into two sections.

- Camp Report Job Status
- Camp Report Status

Camp Report Job Status

This section displays date and time a report was started and completed, the overall status in percentage, the number of campers 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.

Camp Report Status

This section displays reports generated from the Report/Camper 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 latest report at the top. You will see the status for that report in the top section. If the report returned with at least one camper, it will then 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 NYSIIS database.

You do not have to remain on this screen while the reports are running. You can navigate away from this screen and go somewhere else in the application while your report runs in the background. To get back to the 'check status' screen, click on the 'camp report' link in the menu panel on your left.

As soon as the report name appears as a hyperlink or the 'Status' displays ‘Ready’, it has completed processing and is ready for viewing. To view the report, simply click on the desired report name hyperlink. (This process can take some time depending on the size of the report)
The selected report will automatically be displayed using the Adobe Acrobat Reader. If there is a problem viewing your report please contact the NYSIIS Help Desk.

At any time, click the CANCEL button to return to the previous screen.
Managing Blood Lead

In this chapter:

- Background
- Important Information
- Risk Assessment and Lead Test Recommendations
- Viewing a Patient’s Blood Lead History
- Viewing Blood Lead Tests
- Entering Blood Lead Tests
- Printing a Blood Lead Report
Background

As part of New York State (NYS)'s comprehensive public health approach to eliminate lead poisoning, the Department of Health (DOH) seeks to increase routine lead testing of children. NYS state law and regulations require health care providers to test all children’s blood lead levels at or around ages one year and again at or around two years, and to assess all children six months to six years of age for risk of lead exposure at least annually as part of routine care, with blood lead testing for children at risk of lead exposure based on those assessments. In 2009, amendments to Public Health Law and implementing regulations authorized: 1) physician office laboratories (POLs) to conduct blood lead testing using devices of complexity appropriate for their level of certification; and 2) the DOH to implement a data exchange between the New York State Immunization Information System (NYSIIS) and the statewide childhood blood lead registry, or LeadWeb. This data exchange will:

- Populate NYSIIS with blood lead testing information stored within LeadWeb.
- Utilize NYSIIS as the primary mode for reporting blood lead test results from private POLs that use portable office-based lead testing devices.

Requirements for the NYSIIS/LeadWeb linkage were divided into four sections, including User Interface, Merges, Data Exchange, and Prompts and Reports. At the time of this module's release, the first three sections are operational. The final section is now available and will be improved with the Release of 3.0.0.

A project involving electronic data exchange with the New York City Department of Health and Mental Hygiene (NYCDOHMH) Lead Poisoning Prevention Program (LPPP)'s electronic immunization and lead registry (Online Registry) is in progress. When finished, it will allow those POLs located inside of NYC to fulfill their requirements of reporting to NYSDOH blood lead test results for children residing outside of NYC by using the Online Registry (OR) and for NYCDOHMH to receive NYC residents blood lead test results from POLs reporting to NYSIIS. Until the project is completed, NYC POLs will continue to report using the OR and NYCDOHMH will fax or mail the paper reports to NYSDOH LPPP.

Important Information

The Blood Lead module in NYSIIS allows users to view, manage, and add blood lead test results. All NYSIIS standard and administrative users will be able to view lead test results. Users can add blood lead test results only if their organization has Clinical Laboratory Improvement Amendments (CLIA) certification by NYSDOH’s Physician Office Laboratory Evaluation Program (POLEP) and approval by the NYSDOH LPPP. Test results can also be printed using the Blood Lead Report.

Physician Office Laboratories (POLs) that conduct blood lead testing on their patients are required to:

1. Be certified by the federal Centers for Medicare and Medicaid Services (CMS) through POLEP and have a valid CLIA certificate (CLIA number).
2. Enroll for reporting blood lead test results by contacting the NYSDOH LPPP at (518) 402-7600 or email lppp@health.state.ny.us. Your office will be assigned a Lead Reporting ID number (LRI), and be issued a customized Blood Lead Test Report form (DOH-4430).

3. Complete a NYSIIS-Lead webinar training. POLs currently reporting paper blood lead test results may continue to do so until completion of a NYSIIS-Lead webinar training. Upon completion of the live training webinars, a recorded webinar will be made available for providers at http://nysdoh.webex.com. Click on “Training Center”, then “Attend a Session”, followed by “Recorded Sessions.”

Results for all non-NYC children must be reported within 14 business days of analysis.

- If the child is a NYC resident and the results are:
  - greater than or equal to 10 mcg/dL, the results must be reported within 24 hrs of analysis to NYCDOHMH LPPP. Reporting to NYSDOH will satisfy the reporting requirements.
  - less than 10 mcg/dL, the results must be reported to NYCDOHMH within five business days of analysis. Reporting to NYSDOH will satisfy the reporting requirements.

**Note:** For point-of-care testing using waived test methods, such as the LeadCare II™ device, NYS DOH has established a confirmation threshold level of greater than or equal to 8 mcg/dL. Whenever lead results generated by a waived device are greater than or equal to 8 mcg/dL:

- record results in NYSIIS with a comment that results of confirmatory testing are pending
- confirm test results with a venous sample analyzed by a clinical laboratory that holds a NYS permit in toxicology-blood lead.

See practice standards for use of CLIA-waived point of care test devices at www.health.ny.gov/environmental/lead. (NYCRR Subpart 67-1.2)
**Risk Assessment and Lead Test Recommendations**

This table displays New York State (NYS) Public Health Law and regulations requiring children to have a blood lead test at 12 and 24 months of age and to be assessed for risk of lead exposure at each well child visit. If found to be at risk, a blood lead level should be obtained.

Columns for age of child, recommendation, date recommendation is due, if a risk assessment has been done, if a lead test is indicated, date of the test, and status of the recommendation are included on the table. This table will display regardless of age. The current recommendation row based on the child’s age will be highlighted in green, unless an “Action” is needed (Repeat Test, Requires Venous Test to Confirm, or Requires Follow-up/Management) – then the current recommendation would be shaded gray with red text.

Note: Prior elevated blood lead test results require confirmatory venous testing and an alternate follow-up schedule (review the PDF [NYSDOH Guidelines for the Identification and Management of Lead Exposure in Children](#)).

<table>
<thead>
<tr>
<th>Age</th>
<th>Recommendation*</th>
<th>Date Due</th>
<th>Risk Assessment Done</th>
<th>Lead Test Indicated</th>
<th>Date of Test</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>6 months</td>
<td>Risk Assessment</td>
<td>09/17/2008</td>
<td>▼</td>
<td>▼</td>
<td></td>
<td>Maximum Age Exceeded</td>
</tr>
<tr>
<td>9 months</td>
<td>Risk Assessment</td>
<td>12/17/2008</td>
<td>▼</td>
<td>▼</td>
<td></td>
<td>Maximum Age Exceeded</td>
</tr>
<tr>
<td>12 months</td>
<td>Test All Children</td>
<td>03/17/2009</td>
<td>Test All Children</td>
<td>Test All Children</td>
<td></td>
<td>Maximum Age Exceeded</td>
</tr>
<tr>
<td>15 months</td>
<td>Risk Assessment</td>
<td>06/17/2009</td>
<td>▼</td>
<td>▼</td>
<td></td>
<td>Maximum Age Exceeded</td>
</tr>
<tr>
<td>18 months</td>
<td>Risk Assessment</td>
<td>09/17/2009</td>
<td>▼</td>
<td>▼</td>
<td></td>
<td>Maximum Age Exceeded</td>
</tr>
<tr>
<td>24 months</td>
<td>Test All Children</td>
<td>03/17/2010</td>
<td>Test All Children</td>
<td>Test All Children</td>
<td></td>
<td>Maximum Age Exceeded</td>
</tr>
<tr>
<td>30 months</td>
<td>Risk Assessment</td>
<td>09/17/2010</td>
<td>▼</td>
<td>▼</td>
<td></td>
<td>Maximum Age Exceeded</td>
</tr>
<tr>
<td>3 years</td>
<td>Risk Assessment</td>
<td>03/17/2011</td>
<td>▼</td>
<td>▼</td>
<td>03/16/2011</td>
<td>Completed</td>
</tr>
<tr>
<td>4 years</td>
<td>Risk Assessment</td>
<td>03/17/2012</td>
<td>▼</td>
<td>▼</td>
<td></td>
<td>Not Due</td>
</tr>
<tr>
<td>5 years</td>
<td>Risk Assessment</td>
<td>03/17/2013</td>
<td>▼</td>
<td>▼</td>
<td></td>
<td>Not Due</td>
</tr>
</tbody>
</table>

*Note: Assumes schedule of routine screening and testing. Elevated blood lead test results require confirmatory venous testing and alternate follow-up schedule. Review the NYSDOH Guidelines for the Identification and Management of Lead Exposure in Children by clicking here or by choosing the link in the Action column below for management recommendations.*
Viewing a Patient’s Blood Lead History

The Blood Lead History screen is comprised of three sections: Patient Information, Risk Assessment and Lead Test Recommendation, Blood Lead Test History, and Blood Lead Data.

To view blood lead information for a specific patient in NYSIIS, use one of the following methods:

1. Click on the Manage Patient link under the Patients section of the menu panel. This will display the Patient Search Criteria screen. For information on searching for patients, refer to Chapter 10, Managing Patients. Once a patient is retrieved, select the button to display the patient’s Blood Lead Test History screen.
2. Click on the Manage Lead link under the Blood Lead section of the menu panel. This will display the Patient Search Criteria screen. Once a patient is retrieved, you will navigate directly to the patient’s Blood Lead Test History screen.
3. Click on the Manage Immunizations link under the Immunizations section of the menu panel. This will display the Patient Search Criteria screen. Once a patient is retrieved, select the button to display the patient’s Blood Lead Test History screen.

Patient Information

The Patient Information section at the top of the Blood Lead History screen displays the patient’s name, DOB, Gender, Mother’s Maiden Name, Patient ID, Patient’s Address, Comments, and Patient Notes. This information should be used to verify that the correct patient was found during the search process. Review the information provided by the parent/guardian on the DOH-4430. This form can be used to collect demographic data and record blood lead test results prior to data entry in NYSIIS. If different from what is reported in NYSIIS, verify with the parent and edit the information. To edit this information, click and refer to the Editing/Entering Patient Information section in Chapter 10, Managing Patients.
Note: Patient Address, NYS County of Residence, Race and Ethnicity are very important fields to complete on the Demographic screen. Race and Ethnicity are located under the Patient Information section and Patient Address and County is located under the Address Information section.

Blood Lead Test History

<table>
<thead>
<tr>
<th>Remove</th>
<th>Owned?</th>
<th>Date Sample Collected</th>
<th>Date Sample Analyzed</th>
<th>Date Results Reported</th>
<th>Blood Lead Level</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>07/17/2010</td>
<td>08/01/2010</td>
<td>11/21/2011</td>
<td>&lt;3.3 µg/dL</td>
<td>BLL &lt;5</td>
</tr>
<tr>
<td></td>
<td></td>
<td>02/01/2010</td>
<td>03/21/2010</td>
<td>11/21/2011</td>
<td>5 µg/dL</td>
<td>BLL &lt;10</td>
</tr>
</tbody>
</table>

The Blood Lead Test History section will list all of the selected patient’s blood lead test results and information. The results will be listed in order of the “Date Sample Collected.” Column definitions are listed below:

Remove: Contact the NYSDOH LPPP at (518) 402-7600 or LPPP@health.state.ny.us or the NYSIIS help desk to request a test be deleted. Only State Department of Health users or NYSIIS help desk staff can edit or delete tests.

Owned?: If this column indicates “No,” another provider organization entered or ordered the test and is attesting to its validity. Click on the “No” link to view the view blood lead test owner’s contact information.

Date Sample Collected: This column lists the date the blood lead sample was collected. By clicking on the date link, the details for each individual blood lead test will display. Contact the NYSDOH LPPP at (518) 402-7600 or LPPP@health.state.ny.us or the NYSIIS help desk to request a test be edited or deleted.

Date Sample Analyzed: The date the blood lead test was analyzed.

Date Results Reported: The date the blood lead test result was reported to NYS via the Electronic Clinical Laboratory Reporting System (ECLRS) or automatically entered into NYSIIS via User Interface when saving the record.
Blood Lead Level: This column displays the reported quantitative result for a blood lead test, displayed in micrograms per deciliter.

Action A prompt to instruct the provider what the next step should be. Actions are either Repeat Test, Requires Venous Test to Confirm, Requires Follow-up/Management, BLL < 5, or BLL < 10. Actions requiring follow up per NYS Public Health Law are shown highlighted in red. Tests that do not require follow up are shown highlighted in green.

Note: Owned vs. Not Owned Blood Lead Tests

A single provider does not own any of the patients within NYSIIS, but an organization does own the blood lead tests it reports.

Blood Lead Test History Buttons

The Blood Lead Test History screen contains links to other NYSIIS functions. These links are:

- Immunization History: Clicking this button will return you to the Immunization History screen for the patient.
- Edit Patient: Clicking this button will return you to the Demographic screen for the patient.
- New: Clicking this button will display a new set of fields for entering a blood lead test result. This button only displays for authorized users.
- Report: Clicking this button will display a PDF of the patient’s Blood Lead Report.
- Save: Clicking this button will save the blood lead test and automatically populate the Date Results Reported, Laboratory CLIA Number, Sample Accession Number, and PFI/LRI Number fields. This button only displays for authorized users.
Viewing Blood Lead Tests

To view details of a previously entered blood lead test, click on the Date Sample Collected link in the Blood Lead Test History section:

The previously entered lead test information displays in a read-only format:
Entering Blood Lead Tests - For Authorized Health Care Practices only (requires Lead Reporting ID and CLIA ID)

The Enter Blood Lead Data Screen will be available to authorized users for submitting a blood lead test result. Users who have not enrolled with the NYSDOH will not have access to the Enter Blood Lead Data screen. Contact LPPP staff at (518) 402-7600 or LPPP@health.state.ny.us if you need to enroll. Read Only users will only see the Blood Lead Test History and View Blood Lead Screen.

Note: Do not enter a blood lead test result analyzed by another office or laboratory into NYSIIS. Only state lead program staff may edit or delete preexisting lead tests in NYSIIS.
1. The first six fields are automatically populated and do not allow user entry. Contact the NYS LPPP at (518) 402-7600 if you feel corrections are required.

- **Date Results Reported:** Records the date the blood lead test result was submitted to NYSIIS by clicking on the Save button when all required fields have been completed with valid information. Defaults to the current system date when reporting a new test result.

- **Source Type:** Identifies whether the test results were entered through the user interface or received via data exchange from the state LeadWeb registry.

- **Laboratory CLIA Number:** Displays the assigned CLIA Number for the organization.

- **PFI/LRI Number:** Displays the assigned Lead Reporting Identification Number (LRI) for the laboratory.

- **Sample Accession Number:** Unique test identifier number automatically assigned when the user has completed all required fields and clicks on save. For tests entered into NYSIIS, this is a 14 digit number generated from the organization’s LRI, the Date Sample Collected, and a sequence number beginning with 01 each day. For tests received from data exchange with LeadWeb, each test will receive a laboratory assigned accession number but the accession numbers will not always follow the format previously described.

- **Provider Information in Lead Registry:** Displays provider information received by laboratories submitting test results to NYS using the ECLRS. This information is then transferred into NYSIIS from LeadWeb via data exchange. This field is blank for tests entered directly into NYSIIS through the user interface.

2. The blue asterisked fields are required for each lead test. Information may not be left blank. If left blank, you will receive an error message and cannot continue until the information has been entered. Using the DOH-4430 to collect information from the parent/guardian prior to performing the test, documenting the test results, and referencing while completing data entry will help simplify the process.

- **Ordering Practitioner:** This field records and displays the name of the health care provider who ordered the lead test (Ordering Authority). If this drop down list is blank, your organization’s NYSIIS Administrative user must enter the first and last names of all Ordering Practitioners (Authorities) using the Manage Clinician link under Maintenance (refer to Chapter 8). **The Ordering Practitioner (Authority) field must be set-up prior to entering patient blood lead test results.** The name of the Ordering Practitioner chosen should correspond to the Name of the Health Care Provider Ordering Test field on the completed DOH-4430 form.
**Note:** The Ordering Practitioner (Authority) field must be set-up prior to entering patient blood lead test results. If this drop down list is blank, your organization’s NYSIIS Administrative user must enter the first and last names of all Ordering Practitioners (Authorities) using the Manage Clinician link under Maintenance. Completing these steps prior to entering a lead test ensures proper identification of the provider who ordered the test.

- **Test Method:** This field identifies the device used to perform the blood lead test. The drop down list will display LeadCare® II (CLIA Waived) or LeadCare®. Choose the type of device used to analyze the specimen.

- **Date Sample Collected:** Enter the date the blood lead sample was collected in the MM/DD/YYYY format. A calendar is available to auto populate the field, if you choose to use it.

- **Date Sample Analyzed:** Enter the date the blood lead sample was analyzed in the MM/DD/YYYY format. A calendar is available to auto populate the field, if you choose to use it.

- **Sample Type:** This field identifies the type of sample used to perform the blood lead test. The drop down list will display capillary (finger stick) and venous. Choose the type of sample that was collected.

- **Blood Lead Level:** The result of the lead test in micrograms per deciliter. Depending upon the value of the test result, you will either record a numeric value or select a qualitative value.
  
  - Record a quantitative, numeric value, in the Blood Lead Level field for tests within the reporting range of the testing device.

  Select “High” or “Low” from the drop down box in the Qualitative Result field for tests outside the reporting range of the testing device (i.e. Select > 65 mcg/dl as “High”. Select “Low” as <1.4 for LeadCare®, or <3.3 for Leadcare® II. If a numeric value outside the device’s limit of detection is accidentally entered into the blood lead level field, you will receive an error message that instructs you to select an appropriate qualitative result for the device. If a value of “High” is chosen, upon saving you will receive a message that instructs you to verify the High qualitative result is accurate.

3. The remaining two fields are for recording comments/notes for a specific blood lead test:

- **Lab Result Comments:** The user may enter a comment specific to the lab test that will be submitted to NYSIIS. A comment cannot be entered, edited or deleted once the blood lead test has been submitted (Saved).
- It is recommended to use this field to document when a child is being referred to a clinical laboratory for a confirmatory venous specimen (analyzed using another test method) when the blood lead result obtained using a waived test method is 8 mcg/dL or greater, (such as a LeadCare® II device).

- **Enter Text of Provider Note:** The user may enter multiple notes regarding the entire test. Do not include any confidential information, as the information may be viewed by any provider organization with access to the registry. Previously entered notes may not be edited or deleted, unless the entire test record is deleted.

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**Note:** If you are unable to enter a lead result, contact the New York State Lead Poisoning Prevention Program by e-mail to: LPPP@health.state.ny.us or by phone: 518-402-7600.
Printing a Blood Lead Report

A patient’s blood lead report provides the details of the patient’s complete blood lead test history. To print the report, follow these steps:

1. Click on the **Manage Lead** link under the Blood Lead section of the menu panel.
2. Search for and select your patient using the Patient Search.
3. Click the **Blood Lead Report** button on the screen.
4. Click the "Blood Lead Report" link.

5. The system displays the patient’s blood lead report in PDF format.

6. The patient’s Blood Lead Report can be printed or saved to your computer.
Appendix 1

In the Appendix:
Online Help
NYSIIS Help Desk
Online Help

The NYSIIS online help function provides you with both screen-specific help and a general help index. You may access online help from any screen in NYSIIS 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 button in the top right corner of the box.

General Help

General help contains information on screens throughout NYSIIS. 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.

Contents of General Help

To access the contents of general help, follow these steps:

1. Press the light bulb on the menu bar.
2. Press the 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 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.

**NYSIIS Help Desk**

If you are experiencing difficulties or have questions regarding NYSIIS, you may contact the NYSIIS Help Desk. The help desk is staffed by two NYSIIS experts. All calls are logged and tracked through to completion; calls are put in a pending status until a remedy to the user’s problems is found.

The NYSIIS Help Desk hours are 8:00 a.m. to 5:00 p.m. EST, Monday through Friday.
Help Desk telephone number: 866.389.0371
Help Desk e-mail address: nysiishelpdesk@hp.com
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

NYSIIS validates the information you enter on the patient screen when you attempt to save the entries. If you have entered data that NYSIIS 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.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Web Page/Section</th>
<th>Characters Allowed</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Enter New Patient/Personal Information, Manage Patient/Personal Information</td>
<td>Allow only alpha characters, dashes, and apostrophes. Do not save an entry that matches a disallowed name.</td>
</tr>
<tr>
<td>Middle Name</td>
<td>Enter New Patient/Personal Information, Manage Patient/Personal Information</td>
<td>Allow only alpha characters, dashes, apostrophes, and periods.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Enter New Patient/Personal Information, Manage Patient/Personal Information</td>
<td>Allow only alpha characters, dashes, apostrophes, and periods. Do not save an entry that matches a disallowed name.</td>
</tr>
<tr>
<td>Mother's First Name</td>
<td>Enter New Patient/Personal Information, Manage Patient/Personal Information</td>
<td>Allow only alpha characters, dashes, and apostrophes.</td>
</tr>
<tr>
<td>Mother's Maiden Last Name</td>
<td>Enter New Patient/Personal Information, Manage Patient/Personal Information</td>
<td>Allow only alpha characters, dashes, and apostrophes.</td>
</tr>
<tr>
<td>Responsible Party First Name</td>
<td>Enter New Patient/Responsible Person(s), Manage Patient/Responsible Person(s)</td>
<td>Allow only alpha characters, dashes, and apostrophes.</td>
</tr>
<tr>
<td>Responsible Party Middle Name</td>
<td>Enter New Patient/Responsible Person(s), Manage Patient/Responsible Person(s)</td>
<td>Allow only alpha characters, dashes, apostrophes, and periods.</td>
</tr>
<tr>
<td>Responsible Party Last Name</td>
<td>Enter New Patient/Responsible Person(s), Manage Patient/Responsible Person(s)</td>
<td>Allow only alpha characters, dashes, and apostrophes.</td>
</tr>
<tr>
<td>Street Address</td>
<td>Enter New Patient/Responsible Person(s), Manage Patient/Responsible Person(s)</td>
<td>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.</td>
</tr>
<tr>
<td>Other Address</td>
<td>Enter New Patient/Responsible Person(s), Manage Patient/Responsible Person(s)</td>
<td>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.</td>
</tr>
<tr>
<td>PO Box</td>
<td>Enter New Patient/Responsible Person(s), Manage Patient/Responsible Person(s)</td>
<td>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.</td>
</tr>
<tr>
<td>E-mail Address</td>
<td>Enter New Patient/Responsible Person(s), Manage Patient/Responsible Person(s)</td>
<td>Must contain &quot;@&quot; symbol and period. Do not save quotes.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>Enter New Patient/Responsible Person(s), Manage Patient/Responsible Person(s)</td>
<td>Allow only numeric characters and dashes. Do not save quotes.</td>
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### Disallowed Address Entries

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### Disallowed First Name Entries

The following chart lists first name entries that will not be validated in NYSIIS.

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### Disallowed Last Name Entries

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