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PASIS
Immunization Registry 2.5.1
User Guide



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Introduction

The Pennsylvania Immunization Information System (PASIIS) is a universal web-based statewide immunization registry designed to capture immunization histories of all Pennsylvania patients, regardless of where they receive their vaccinations. PASIIS, in conjunction with the ChartMarker Medical Suite, utilizes 2.5.1 HL7 bidirectional messaging and exchange of vaccine (immunization) information. Once the system is set up, and you are enrolled with PASIIS, immunization records will be automatically sent to the PASIIS when the immunization record is saved (via the Next Account button) in the Immunization sub-tab of Clinical tab in Practice Manager, or when a chart note is saved or closed in the Clinical application.

The following sections will outline how to set up your system for sending immunizations, enrolling and configuring your system with PASIIS, as well as providing information for the daily work-flow of configuring patient consent, entering immunization information, viewing submission status for immunization, and viewing registry records for the patient.

System Setup

Update User Names

When reporting **Administered By** in the HL7 VXU v2.5.1 record, First, MI, and Last Names are required. This information must be entered for each user and can be done in either the Clinical application or in the Practice Manager Administration Tool. Do note, users must have the proper privileges to add or modify user information.

CLINICAL

Use the following steps to add or modify first, middle initial, and/or last name for a user in ChartMaker® Clinical.

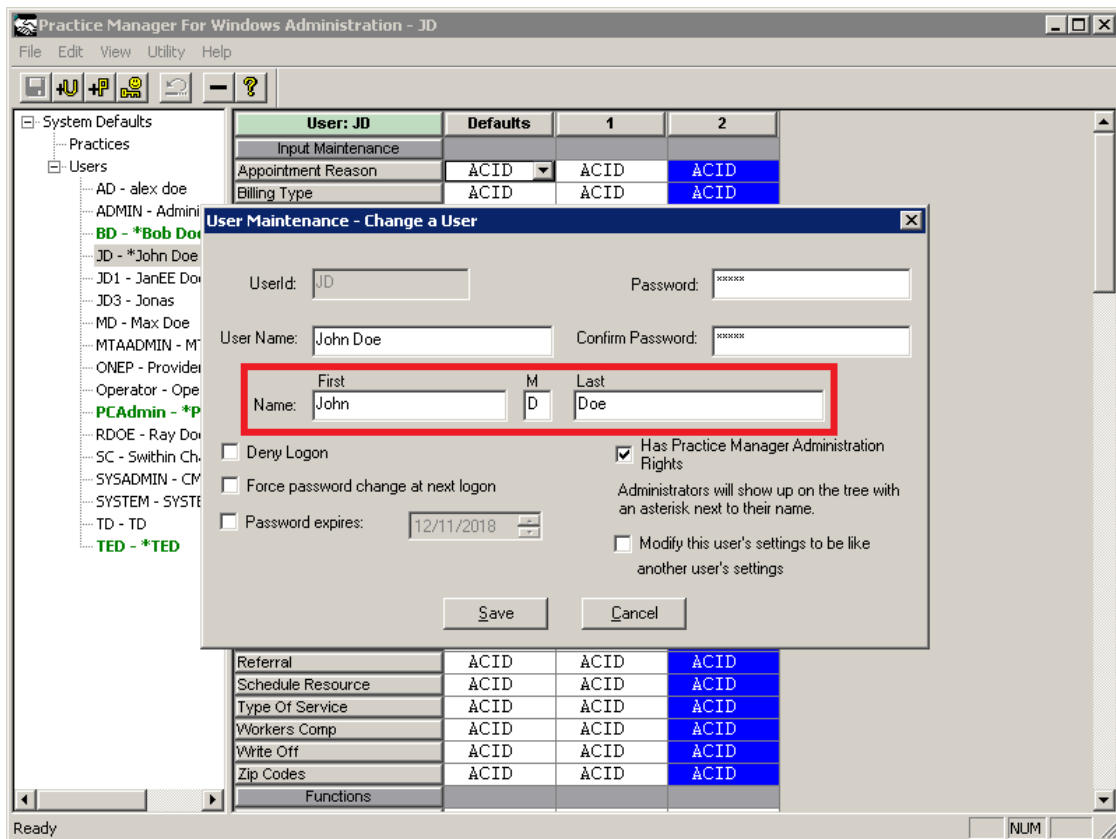
1. Click **Edit > System Tables > Users**.
2. In the Users dialog, double-click the **User**.
3. Click the **Privileges** tab.
4. In the Name field, add or modify the **First**, **Middle** initial, and/or the **Last** name for the user as needed.
5. When finished, click the **OK** button.

The screenshot shows the 'User Groups & Practices' dialog box. The 'Name' field is highlighted with a red box, showing 'John' in the 'First' column, 'D' in the 'M' column, and 'Doe' in the 'Last' column. Other fields include 'Login ID' (JD), 'User Name' (John Doe), 'Credentials' (MD), 'Role' (None), and a list of privileges with 'Charts' selected. The 'Level' section has radio buttons for 'None', 'Patient Demographics', 'Read', 'Write', 'Sign w/ Co-Sign', and 'Sign'.

PRACTICE MANAGER ADMINISTRATION TOOL

Use the following steps to add or modify first, middle initial, and/or last name for a user in the Practice Manager Administration Tool.

1. Access the **Practice Manager Administration Tool** and login to the Practice Manager Administration module.
2. In the User list, highlight the **User** you want to modify information for, and then click the  button, or click **Edit > Change User Logon Information**.
3. In the User Maintenance - Change a User dialog, add or modify the **First**, **Middle** initial, and/or the **Last** name for the user as needed.
4. When finished, click the **Save** button.



Practice Manager For Windows Administration - JD

File Edit View Utility Help

System Defaults

Practices

Users

AD - alex doe

ADMIN - Admin

BD - *Bob Doe

JD - *John Doe

JD1 - JanEE Doe

JD3 - Jonas

MD - Max Doe

MTAADMIN - M

ONEP - Provider

Operator - Ope

PCAdmin - *P

RDOE - Ray Doe

SC - Swithin Ch

SYSDADMIN - CM

SYSTEM - SYSTE

TD - TD

TED - *TED

User: JD Defaults 1 2

Input Maintenance

Appointment Reason ACID ACID ACID

Billing Type ACID ACID ACID

User Maintenance - Change a User

User ID: JD Password: xxxxxx

User Name: John Doe Confirm Password: xxxxxx

Name: First John M D Last Doe

☐ Deny Logon

☐ Force password change at next logon

☐ Password expires: 12/11/2018

☒ Has Practice Manager Administration Rights

Administrators will show up on the tree with an asterisk next to their name.

☐ Modify this user's settings to be like another user's settings

Save Cancel

Referral ACID ACID ACID

Schedule Resource ACID ACID ACID

Type Of Service ACID ACID ACID

Workers Comp ACID ACID ACID

Write Off ACID ACID ACID

Zip Codes ACID ACID ACID

Functions

Ready NUM

Designate Procedures as Immunization

In Practice Manager, procedures need to be added to the immunization system so that the program will automatically transfer applicable procedures entered in the Charge screen to the Clinical > Immunization tab in Practice Manager, allowing you to enter or update the immunization information for that procedure.

In Clinical, procedures need to be configured with an Immunization type, so that when adding a procedure, the Order Procedure dialog will contain the Manufacturers and Lot Numbers for this Procedure, Vaccine Information Statement, Immunization, and Immunization Consent sections that allow you to configure the proper immunization information for the procedure.

Do note, however, to avoid sending duplicate immunization records to various vaccine registries (i.e., PASIIS, PASIIS, PASIIS, Philadelphia KIDS, PASIIS, VIIS, etc.), **you must remove those immunization procedures that are inputted through the Clinical application.**

The following sections will walk you through performing these actions.

DESIGNATE PROCEDURES AS IMMUNIZATION IN PRACTICE MANAGER

In Practice Manager, procedures need to be added to the immunization system so that the program will automatically transfer applicable procedures entered in the Charge screen to the Clinical > Immunization tab in Practice Manager, allowing you to enter or update the immunization information for that procedure.

Use the following steps to designate procedures as immunization in Practice Manager.

1. In Practice Manager, click **Add-Ins > Clinical > Immunizations > Procedures**.
2. In the Available Procedures column, select any procedures that will be used as part of the Immunization system, or click the **Select All** button to select all procedures.

*****NOTE*****

To highlight multiple procedures, press and hold the CTRL key when selecting the applicable procedures.

3. Click the **Add>>** button.
4. Once procedures have been selected and appear in the Selected Procedures section, you can remove procedures by highlighting the applicable procedures, and then clicking the **Remove** button.
5. When finished, click the **Save** button.

DESIGNATE PROCEDURES AS IMMUNIZATION IN CLINICAL

Use the following steps to designate procedures for immunization in Clinical.

1. In Clinical, click **Edit > System Tables > Conditions > Procedures**.
2. In the Procedure Search dialog, search for and select the procedure you would like to designate as an immunization procedure.
3. In the Type field of the Conditions Properties dialog, select **Immunization**.
4. Click the **Save** button.
5. Report steps 2 -4 for any other procedures you wish to designate as immunization procedures.

ELIMINATE DUPLICATE IMMUNIZATION RECORDS IN PRACTICE MANAGER

To avoid sending duplicate immunization records to various vaccine registries (i.e., PASIIS, PASIIS, PASIIS, PhilaVax, PASIIS, VIIS, etc.), you must remove those immunization procedures that are inputted through the Clinical application. Use the following steps to remove the procedures that are inputted in the Clinical application.

1. In Practice Manager, click **Add-Ins > Clinical > Immunizations > Procedures**.
2. In the Selected Procedures column select any procedures that are entered via the Clinical application or click the **Select All** button to select all procedures.

*****NOTE*****

To highlight multiple procedures, press and hold the CTRL key when selecting the applicable procedures.

3. Click the **<<Remove** button.
4. Once the applicable procedures have been removed, click the **Save** button.

Configure Immunization Procedures

In Practice Manager, there are a few changes that need to be made to procedures to ensure efficient and proper information is sent when sending that information to vaccine registries and when billing to insurance companies. Q-Codes are required for Medicare billing, but are not accepted by your state Registry. A procedure override will need to be added so you can continue to bill Medicare the appropriate CPT4 code for payment, and still have the vaccine records sent to your Registry. Likewise, CVX Code, VIS documents, Manufacturer, Lot Number, and Lot Expiration can be entered in the procedure file so that it defaults when entering immunization information for a patient in both the Clinical and Practice Manager applications.

Use the following steps to configure immunization procedures.

1. Click **Administration > Transaction Tables > Procedure**.
2. If you are entering a new immunization procedure, enter the **CPT-4 code** in the IH Code field and press **Tab**.

NOTE

If the immunization procedure already exists, you can click the lookup button, and search for the code. Once the applicable immunization procedure has been located, skip to step 4.

3. Enter a **Description**, **CPT4 Code** (if applicable), standard charge **Amount**, **TOS**, **POS**, and **Unit Value**.
4. If you are entering or modifying a **Q Code** (i.e., Q2035, Q2036, Q2037, Q2038) for Medicare, click into the CPT4 Code field, and enter the appropriate **9xxxx code**, and then click the **Billing Codes** button.
5. In the Procedure Billing Codes Override dialog, click the **New** button.
6. In the Billing Form field, select the applicable **Medicare Electronic Billing Form**.
 - Pennsylvania: **DEMCR_P5** and **MCRPDE**
 - Maryland: **MDMCR_P5** and **MCRPDE**
 - Pennsylvania: **NJMCR_P5** and **MCRPPA**
 - New York: **NYMCR_P5** and **MCRPNY**
 - Pennsylvania: **PAMCR_P5** and **MCRPPA**
 - Virginia: **VAMCR_P5** and **MCRPVA**
7. In the Billing Code (CPT4) field, enter **Q2038** (or another Q Code as needed).

Procedure Billing Code Overrides

IH Code	Billing Form	Insurance	Field 1	Field 2	Field 3	Field 4	Field 5	Activation Date
Q2038	DEMCR_P5	<All>						Q2038
Q2038	MCRPDE	<All>						Q2038

Procedure - Q2038 - Q Code for Influenza

1.. Override Key:

Billing Form: DEMCR_P5

Insurance: 66

2.. Override Data:

#	Form Label	Override
1	Billing Code (CPT	Q2038
2	Extra Modifiers	
3	Home Health Car	
4	Clinical Trial#	
5	Mammography Pr	

Activation Date: / / Expiration Date: / /

Add To List Cancel

8. Click the **Add to List** button.
9. Repeat steps 5 – 8 for the **Medicare Paper Billing Form** (see listing in step 6 above).
10. Repeat steps 5 – 9 for any other state Medicare, and the applicable billing forms, for which you bill.
11. When finished, click the **Close** button.
12. In the Procedure dialog, click the **Immunization** button.
13. In the CVX Code field, enter or search for the **CVX code** for the procedure you are adding.

*****NOTE*****

The system will automatically default a CVX Code for applicable procedures based on the CDC's mapping list. Click the **Visit CDC's CPT Mapped to CVX List** to view the CDC's mapping list.

*****NOTE*****

When searching for a CVX code in the Search List dialog, you can add, remove, and edit the description of CVX (via Properties) by clicking the corresponding button.

14. Once a CVX code has been added, click the **VIS** button to associate any applicable VIS documents with the CVX code.

In the VIS Document Selection dialog, VIS Documents can be associated to a CVX code by highlighting the applicable code(s) in the VIS Documents column and clicking the **>** button. Or, they can be disassociated by highlighting the code(s) in the VIS Documents Associated with this CVX Code column and clicking the **<** button. likewise, you can add, remove, and activate and inactivate (via Properties), VIS documents via the corresponding buttons at the bottom of the dialog. Click the **OK** button when finished. When a VIS document is attached to a CVX code the VIS button will become highlighted.

*****NOTE*****

The system will automatically default any VIS documents mapped to CVX Codes based on the CDC list. Click the **Visit CDC's CVX Mapped to VIS List** to view the CDC's mapping list.

15. To add Manufacturers and Lot Numbers for the procedure, click the **New** button.
16. In the Manufacturer field, enter or search for the proper **Manufacturer**.
17. In the Trade Name field, enter the **Trade Name** for this immunization, if applicable.
18. In the Product CVX Code field, enter or search for the **CVX code** for the manufacturer you are adding.

*****NOTE*****

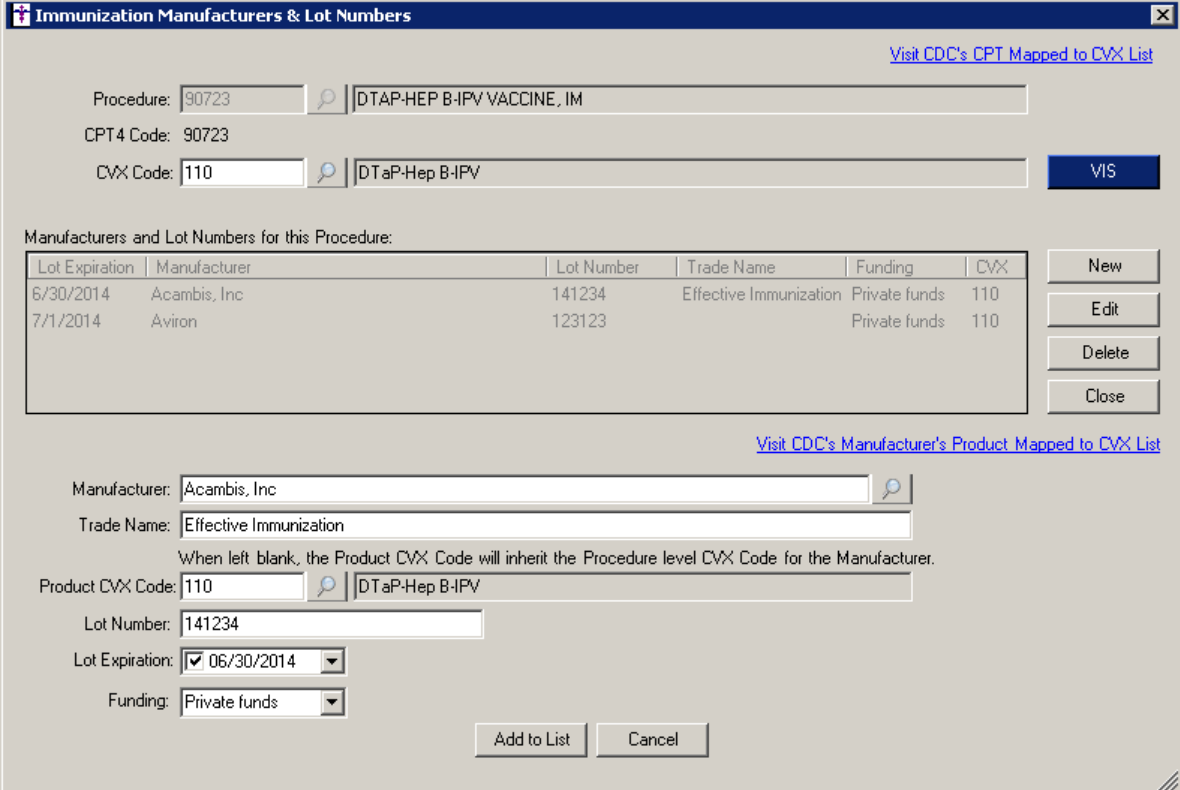
The system will automatically default a CVX Code for applicable manufacturers based on the CDC's mapping list. Click the **Visit CDC's Manufacturer's Product Mapped to CVX List** to view the CDC's mapping list.

*****NOTE*****

When searching for a CVX code in the Search List dialog, you can add, remove, and edit the description of CVX (via Properties) by clicking the corresponding button.

19. In the Lot Number field, enter applicable **Lot Number** for this immunization.
20. In the Lot Expiration field, check the date box, and then enter or select the applicable **Expiration Date** for the lot number.
21. In the Funding field, click the **Public** or **Private** radio button, as applicable.
22. Click the **Add To List** button.
23. Repeat steps 5 - 12 to add additional manufacturers and lot numbers, as needed.

24. When all applicable manufacturer and lot number information has been added for this procedure, click the **Close** button.



The screenshot shows a software window titled "Immunization Manufacturers & Lot Numbers". At the top right is a link: "Visit CDC's CPT Mapped to CVX List". Below this are input fields for "Procedure:" (containing "90723" and "DTaP-HEP B-IPV VACCINE, IM"), "CPT4 Code:" (containing "90723"), and "CVX Code:" (containing "110" and "DTaP-Hep B-IPV"). A blue "VIS" button is to the right of the CVX field. Below these is a section titled "Manufacturers and Lot Numbers for this Procedure:" containing a table with two rows of data. To the right of the table are buttons for "New", "Edit", "Delete", and "Close". Below the table is another link: "Visit CDC's Manufacturer's Product Mapped to CVX List". At the bottom are input fields for "Manufacturer:" (containing "Acambis, Inc"), "Trade Name:" (containing "Effective Immunization"), "Product CVX Code:" (containing "110" and "DTaP-Hep B-IPV"), "Lot Number:" (containing "141234"), "Lot Expiration:" (a dropdown menu with "06/30/2014" selected), and "Funding:" (a dropdown menu with "Private funds" selected). At the very bottom are "Add to List" and "Cancel" buttons.

Procedure: 90723 DTaP-HEP B-IPV VACCINE, IM

CPT4 Code: 90723

CVX Code: 110 DTaP-Hep B-IPV VIS

Manufacturers and Lot Numbers for this Procedure:

Lot Expiration	Manufacturer	Lot Number	Trade Name	Funding	CVX
6/30/2014	Acambis, Inc	141234	Effective Immunization	Private funds	110
7/1/2014	Aviron	123123		Private funds	110

New Edit Delete Close

Visit CDC's Manufacturer's Product Mapped to CVX List

Manufacturer: Acambis, Inc

Trade Name: Effective Immunization

When left blank, the Product CVX Code will inherit the Procedure level CVX Code for the Manufacturer.

Product CVX Code: 110 DTaP-Hep B-IPV

Lot Number: 141234

Lot Expiration: 06/30/2014

Funding: Private funds

Add to List Cancel

25. In the Procedure screen, click the **Save** button.
26. Repeat steps 2 - 25 for any other immunization procedures that need to be configured.

Registry Enrollment & Configuration

PASIIS Enrollment

If you are interested in participating in the PASIIS, please complete the [provider interest form](#). After you have completed and submitted the provider interest form, a PASIIS staff member will contact you to schedule a meeting and establish implementation data. Your office will be assigned a Facility ID Number and Bi-Directional credentials.

For further details on the enrollment process, as well as information on any further forms that need to be submitted, see the [PASIIS Enrollment Instructions](#) document via our [website](#).

Registry Configuration for PASIIS

The Registry Configuration dialog allows you to configure vaccine registry information for registries in 2.5.1 and later formats. In the Registry Configuration dialog, you can set up Office Location and Site ID information for each of the registries you submit to, while also setting up Bidirectional Credentials (Practice, User ID, and Password) for those registries that support bidirectional. You can register patients in either the Clinical or Practice Manager application.

Use the following steps to configure registry information for the PASIIS.

1. In Clinical, click **Chart > Registries > Immunization > Configuration**. Or, in Practice Manager, click **Administration > Registries > Immunization > Configuration**.
2. In the Registry Format field, select **PASIIS v 2.5.1**.
3. In the Office Location and Site ID section, enter or search for an **Office Location**, and then enter the applicable **Site ID**. Site IDs are required for all 2.5.1 registry formats.
4. Once the Office Location and Site ID has been entered, click the **Add** button. The location and ID will then appear in the list above. You can delete an Office Location and Site ID by highlighting the entry in the list and then clicking the **Delete** button.
5. Repeat steps 3 and 4 to add additional Office Locations and corresponding Site IDs.
6. After the applicable Office Locations and Site IDs have been configured, be sure to select a **Default**.
7. In the Bi-directional Credentials section, enter or search for the **Practice**.
8. Enter the corresponding **User ID** and **Password** for that practice, and then click the **Add** button. You can delete a practice User ID and Password by highlighting the entry in the list and then clicking the **Delete** button.
9. Repeat steps 7 and 8 to configure User ID and Password information for any additional practices.
10. In the Instructions for Sending Immunizations section, check the **Send to registry environment** option, and then click the **Production** or **Test** radio button as needed.

*****NOTE*****

The PASIIS registry requires you start out in **Test** mode

11. Check the **Do not send immunizations with a service date prior to:** field, and then configure the applicable **Service Date** in the corresponding drop-down field, if applicable.
12. Check the **Send historical immunization** option, if applicable.

Registry Configuration

Registry Format:
PA-SIIS v 2.5.1
* Supports bi-directional functionality.

Office Location and Site ID

Enter the Site ID, provided by the immunization registry, for the office location it's assigned to.

Please indicate one Default Site ID

Office Location	Site ID	Inventory ID	Default
STI Medical Practice (STI)	1234	5678	☒
STI Vein Center (STIVEIN)	4321	8765	☐

Office Location:
Site ID:
Inventory ID:
Add
Delete

Bi-directional Credentials

Practice	User ID	Password
Fictional Physicians (1)	FP1	Password

Practice:
User ID:
Password:
Add
Delete

Instructions for Sending Immunizations

☒ Send to registry environment:
☐ Production
☒ Test

☐ Do not send immunizations with a service date prior to:
11/ 1/2018

☒ Send historical immunizations

Save
Cancel

13. When finished configuring registry information, click the **Save** button.

View the Invalid Data Report

This Invalid Data report will display immunization records that contain missing Dose Unit, Route or Site information. Do note, that the errors contained in this report will be based on any Do not send immunizations with a service date prior to: date entered in the Registry Configuration dialog for those registries configured for bidirectional exchange. These records will need to be corrected before they are sent to a registry. Use the following steps to view the Invalid Data report.

1. In Clinical, click **Chart > Registries > Immunization > Invalid Data Report**. Or, in Practice Manager, click **Administration > Registries > Immunization > Invalid Data Report**.
2. The Report Viewer dialog, the Immunizations - Invalid Data report will be displayed showing any errors. You can **Export Report**, **Print Report**, or **Copy** portions of the report, using the corresponding buttons at the top of the dialog.
3. When finished, click the **Close (X)** button.

9/4/2014 3:23 pm IMMUNIZATIONS - INVALID DATA Page: 1

Practice	Account#	Service Date	Procedure	Fields with Invalid Data
1	10010	04/22/2014	90660	Route
1	10011	06/11/2014	90633	Site
1	10011	04/22/2014	90661	Route
1	10012	04/22/2014	90662	Route, Site
1	10021	06/11/2014	90707	Dose, Route, Site
1	10022	06/11/2014	90713	Dose, Route, Site
2	10062	07/02/2014	90703	Dose, Route, Site

Total Errors: 7

Current Page No.: 1 Total Page No.: 1 Zoom Factor: Page Width

Daily Work-Flow

Set Patient Consent for Immunizations (PASIIS)

When sending immunization information to immunization registries in the HL7 Version 2.5.1 format, you must access the Consent button (in either Practice Manager via the Patient screen, or in Clinical via the ID tab) for each applicable patient to configure whether the patient wants to share this information with the registry. This process replaces the Consent for Immunization and Permission to Share options in the Order Procedure dialog in Clinical, and the Immunization Entry dialog in Practice Manager, for sending immunization information to registries in the 2.5.1 HL7 format. Do note, however, that the Consent for Immunization option should still be configured at the procedure level (in the Order Procedure dialog in Clinical, and the Immunization Entry dialog in Practice Manager) to provide accurate documentation within the chart note and patient's record, when applicable.

The Immunization section of the Consent dialog allows you to configure the patient's registry status, reminder preferences, consent to share data with other clinicians, along with the corresponding effective dates, as well as whether to send immunization information to a registry for each applicable registry for a patient. Use the following steps to configure consent information for a patient, when applicable.

1. In Clinical, open the patient's chart, click the **ID Tab**, and then click the **Consent** button. Or, in Practice Manager, click the Patient tab, enter or search for the patient's **Account #**, and then click the **Consent** button.
2. In the Registry Name field in the Immunization section, select **PASIIS v 2.5.1**.
3. Check the **Do not send patient's immunizations to this registry** option if you do not want immunizations sent to PASIIS.
4. Search for and select the **Registry Status** for the patient, and then enter the corresponding **Effective Date**. (Typically, this is set to **Active**.)
5. Search for and select the **Reminder Preference** for the patient, and then enter the corresponding **Effective Date**.

*****NOTE*****

Certain registries only accept certain codes, be sure to enter a valid preference when configuring a Reminder Preference for the registry.

6. For the Protect the immunization data from other clinicians option, click the **Yes** radio button if the patient does not want their data shared with other clinicians, or click the **No** radio button if the patient does want their data shared with other clinicians, and then select the corresponding **Effective Date**.
7. Repeat steps 2 - 6 for any other registries you will be sending immunization information to for this patient.

Consent

Medication History Consent

☒ Yes, consent given
☐ Yes, guardian/PQA consent given
☐ No consent
☐ Not asked

Provider: All Providers

Date of consent: 8/13/2013

HIE Consent

- Central Medical Associates (HIXNY)
 - Chandler, Swithin (Export consent given. Import consent r...

Edit Consent Record

Immunization

Registry Name: PA-SIIS v 2.5.1

☐ Do not send patient's immunizations to this registry.

Effective Date: 10/19/2017

Registry Status: Active

Effective Date: 10/19/2017

Reminder Preference:

Effective Date: 10/19/2017

Protect immunization data from other clinicians: ☐ Yes ☒ No ☐ Not Asked

Effective Date: 2/21/2014

OK Cancel

- When finished, click the **OK** button to activate the changes. Click the **Cancel** button to exit the Consent dialog without saving any changes.

Register a Patient for PASIIS

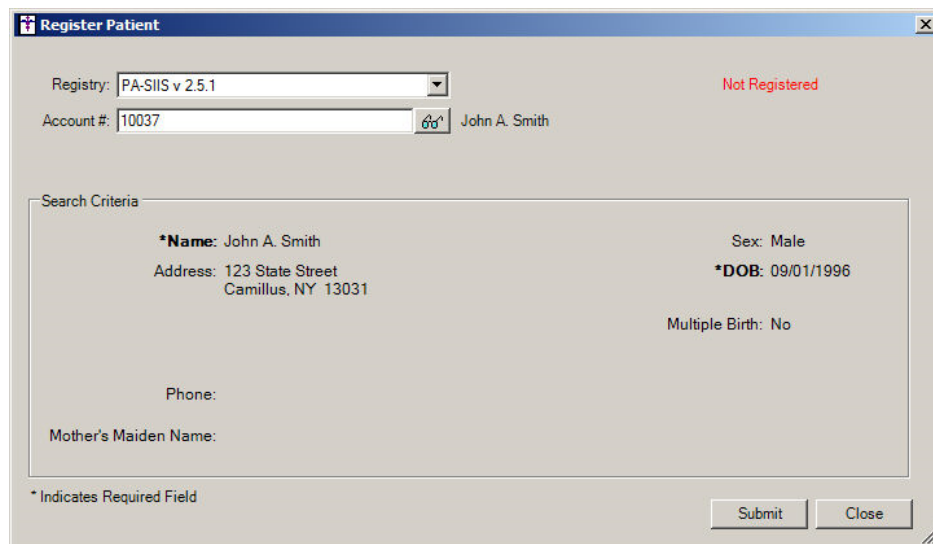
The Register Patient dialog allows you to easily register the patient for bidirectional transmission to vaccine registries. The PASIIS registry needs to be configured for bidirectional transmission prior to registering patients. You can register patients in either the Clinical or Practice Manager application. Use the following steps to register a patient for PASIIS.

1. In Clinical, click **Chart > Registries > Immunization > Register Patient**. Or, in Practice Manager, click **Administration > Registries > Immunization > Register Patient**.
2. In the Registry field, select the **PASIIS v 2.5.1**.
3. Enter or search for the patient's **Account #** that you want to register.

*****NOTE*****

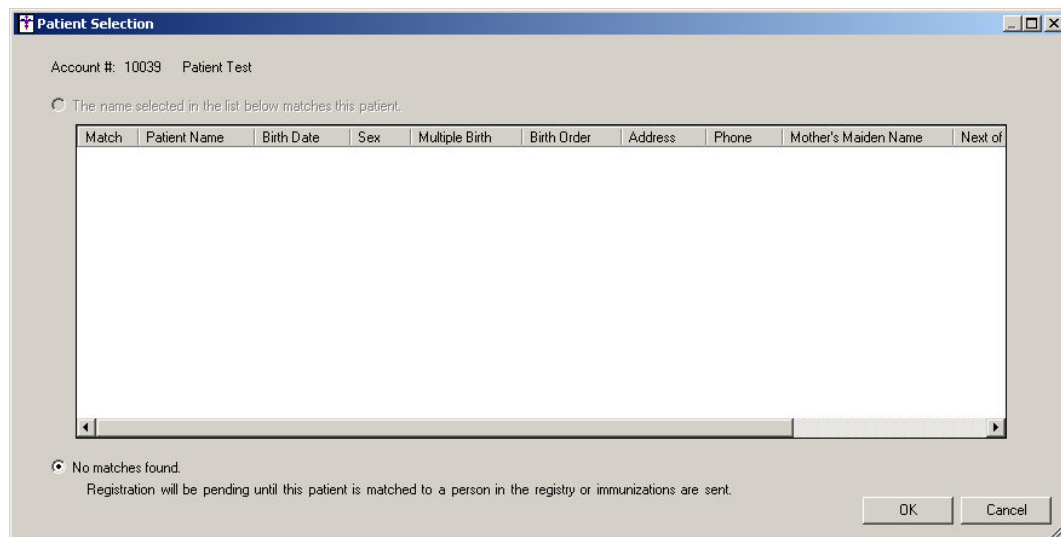
When registering patients, the **Name** and **DOB** are required. If these items are not currently configured for the patient, then you need to update that information prior to registering.

4. Once all the applicable information is displayed as desired, click the **Submit** button.



The "Register Patient" dialog box shows the "Registry" dropdown set to "PA-SIIS v 2.5.1" and the "Account #" field containing "10037". A red "Not Registered" message is displayed. The "Search Criteria" section shows patient details: *Name: John A. Smith, Sex: Male, Address: 123 State Street, Camillus, NY 13031, *DOB: 09/01/1996, Multiple Birth: No, Phone: (empty), and Mother's Maiden Name: (empty). A legend indicates that an asterisk (*) denotes a required field. "Submit" and "Close" buttons are at the bottom right.

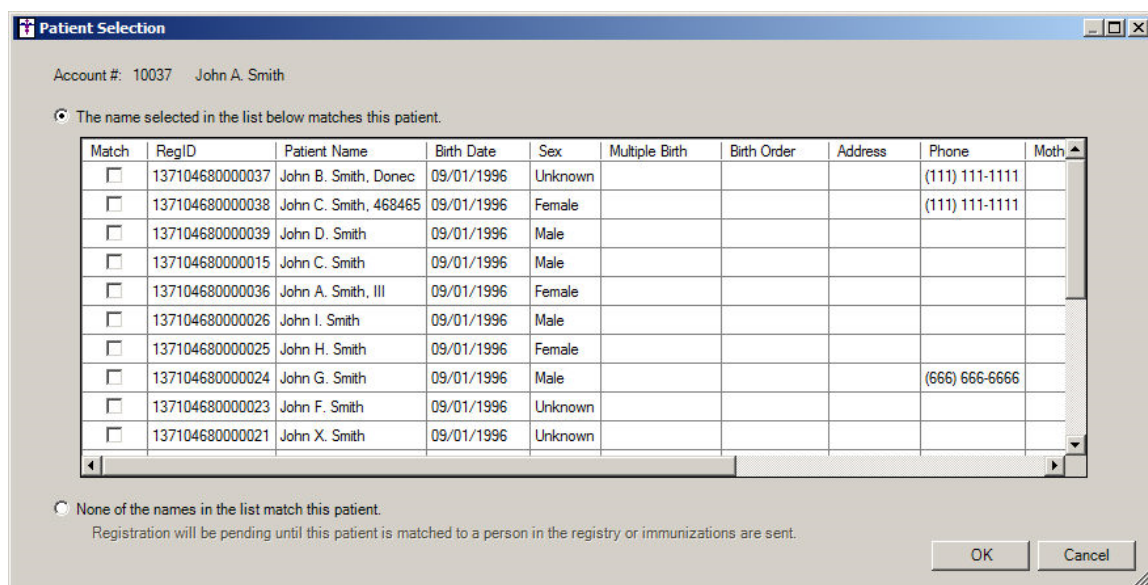
5. If the patient does not exist on the registry and there are no matches to choose from, you will be defaulted to No matches found.



The "Patient Selection" dialog box shows "Account #: 10039" and "Patient Test". A radio button is selected for "The name selected in the list below matches this patient." Below is a table with columns: Match, Patient Name, Birth Date, Sex, Multiple Birth, Birth Order, Address, Phone, Mother's Maiden Name, and Next of. The table is currently empty. At the bottom, another radio button is selected for "No matches found." with a note: "Registration will be pending until this patient is matched to a person in the registry or immunizations are sent." "OK" and "Cancel" buttons are at the bottom right.

Match	Patient Name	Birth Date	Sex	Multiple Birth	Birth Order	Address	Phone	Mother's Maiden Name	Next of
-------	--------------	------------	-----	----------------	-------------	---------	-------	----------------------	---------

6. If there are multiple patients with a similar name in the registry, you will need to match the correct patient. Check the **Match** box next to the patient in the list that you want to associate with the patient you are registering, and then click the **OK** button.
7. Click the **None of the names in the list match this patient** option, if there is not a match for the patient you are registering.
8. When the **No Matches found** or the **None of the names in the list match this patient** options are selected, registration will be pending until immunizations are sent to the registry for this patient. If the patient has any valid immunization records to send, they will be sent automatically upon registration, thus setting the patient status as Registered. Once immunizations are sent, the patient will be registered, and you will be able to download applicable registry records for that patient.



Patient Selection

Account #: 10037 John A. Smith

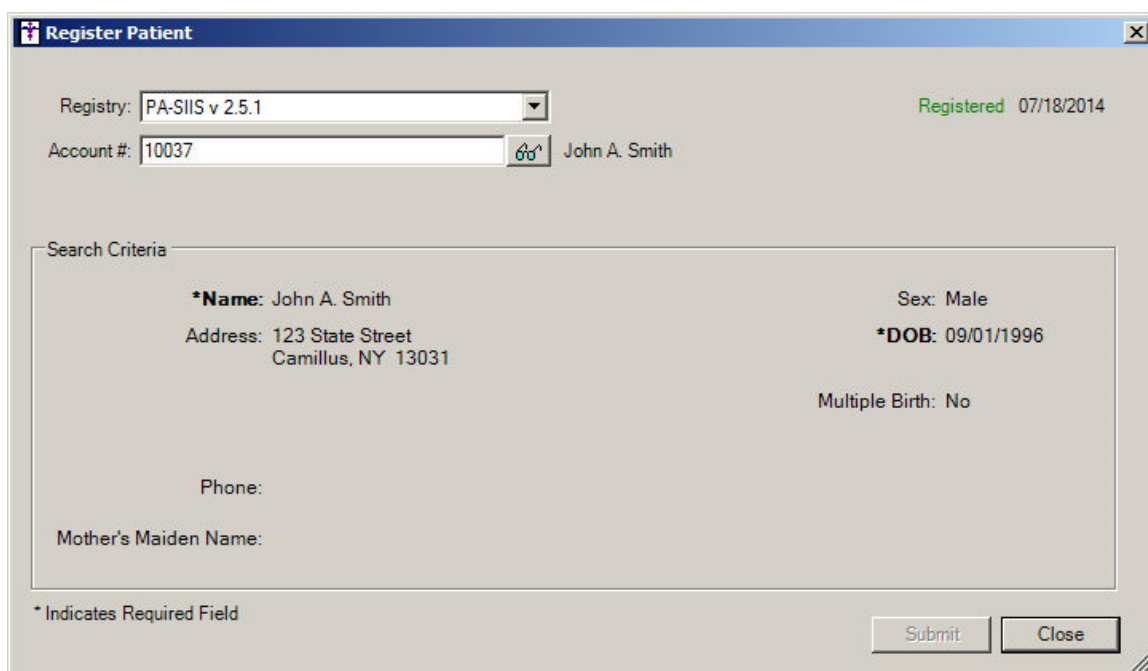
☒ The name selected in the list below matches this patient.

Match	RegID	Patient Name	Birth Date	Sex	Multiple Birth	Birth Order	Address	Phone	Moth
☐	137104680000037	John B. Smith, Donec	09/01/1996	Unknown				(111) 111-1111	
☐	137104680000038	John C. Smith, 468465	09/01/1996	Female				(111) 111-1111	
☐	137104680000039	John D. Smith	09/01/1996	Male					
☐	137104680000015	John C. Smith	09/01/1996	Male					
☐	137104680000036	John A. Smith, III	09/01/1996	Female					
☐	137104680000026	John I. Smith	09/01/1996	Male					
☐	137104680000025	John H. Smith	09/01/1996	Female					
☐	137104680000024	John G. Smith	09/01/1996	Male				(666) 666-6666	
☐	137104680000023	John F. Smith	09/01/1996	Unknown					
☐	137104680000021	John X. Smith	09/01/1996	Unknown					

☐ None of the names in the list match this patient.
Registration will be pending until this patient is matched to a person in the registry or immunizations are sent.

OK Cancel

9. Once the patient has been registered, click the **Close** button.



Register Patient

Registry: PA-SIIS v 2.5.1 Registered 07/18/2014

Account #: 10037 John A. Smith

Search Criteria

***Name:** John A. Smith **Sex:** Male

Address: 123 State Street
Camillus, NY 13031 ***DOB:** 09/01/1996

Multiple Birth: No

Phone:

Mother's Maiden Name:

* Indicates Required Field

Submit Close

Configure Immunization Information for a Patient in Practice Manager

When an immunization procedure is entered as a charge in Practice Manager for a patient, an immunization entry will appear in the Immunization tab of the Clinical screen allowing you to edit that immunization procedure and enter the applicable immunization information.

Likewise, if a procedure was not configured in the Immunization system at the time of charge entry in Practice Manager; or if you need to add additional immunization information for a procedure; or if you need to enter immunization information without adding a charge, you can add or edit immunization information in the Immunization tab of the Clinical screen. Do note, that when immunization procedures are added as charges in Practice Manager you will need to edit the immunization record to enter the VIS information, VFC Eligibility, Manufacturer, Lot Number, Lot Expiration Date, as well as Dose, Route, and Site information for that record.

When an immunization procedure and immunization information is entered in the Clinical application, once the chart is saved that contains that information, the immunization record will be transferred to the Immunization sub-tab of the Clinical tab in Practice Manager for that patient. You cannot edit immunization records that were generated from the Clinical application; however, you can view the immunization information by highlighting the record, and then clicking the **View** button.

The following sections will walk you through adding immunization information for a specific procedure code, as well as adding, editing, and deleting immunization information for a patient in Practice Manager.

ADD IMMUNIZATION INFORMATION TO A PROCEDURE

Use the following steps to add Immunization information to a Procedure code.

1. Access the **Procedure Code** you wish to add immunization information for.
2. Click the **Immunization** button.
3. In the CVX Code field, enter or search for the **CVX code** for the procedure you are adding.

NOTE

The system will automatically default a CVX Code for applicable procedures based on the CDC's mapping list. Click the Visit CDC's CPT Mapped to CVX List to view the CDC's mapping list.

NOTE

When searching for a CVX code in the Search List dialog, you can add, remove, and edit the description of CVX (via Properties) by clicking the corresponding button.

Immunization Manufacturers & Lot Numbers

[Visit CDC's CPT Mapped to CVX List](#)

Procedure: 90707 | MMR VACCINE, SC

CPT4 Code: 90707

CVX Code: 03 | MMR **VIS**

Manufacturers and Lot Numbers for this Procedure:

Lot Expiration	Manufacturer	Lot Number	Trade Name	Funding	CVX
----------------	--------------	------------	------------	---------	-----

[Visit CDC's Manufacturer's Product Mapped to CVX List](#)

Manufacturer: |

Trade Name: |

When left blank, the Product CVX Code will inherit the Procedure level CVX Code for the Manufacturer.

Product CVX Code: |

Lot Number: |

Lot Expiration: 02/05/2019

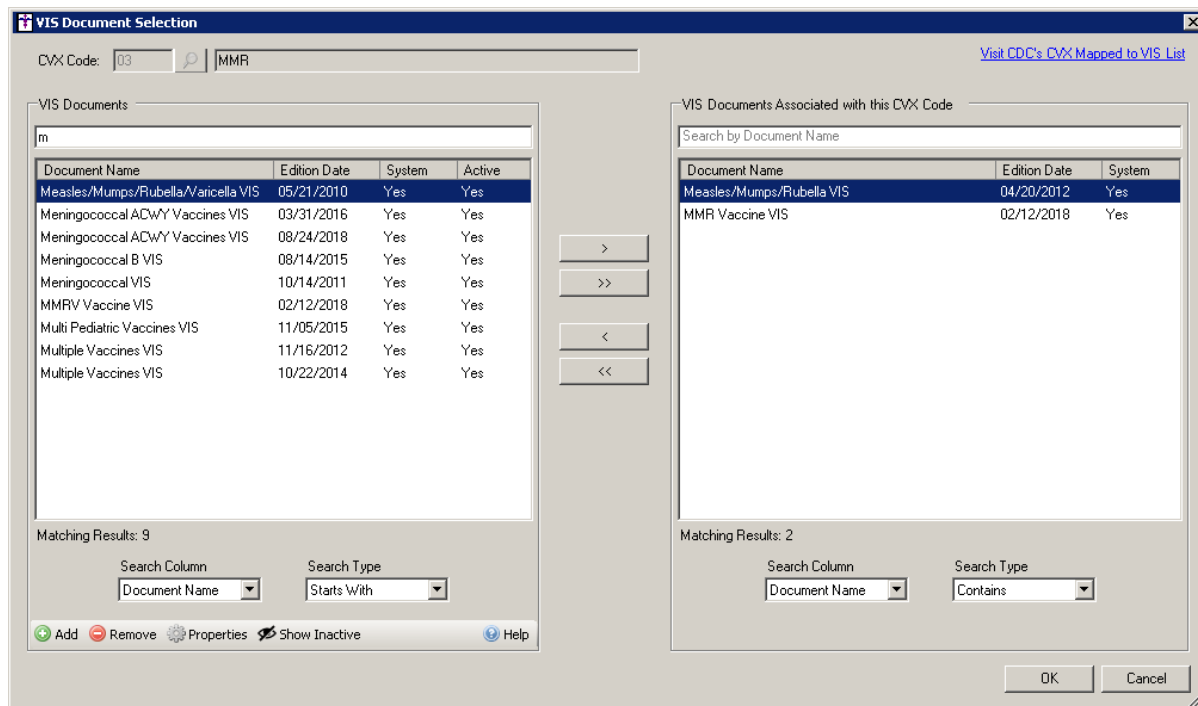
Funding: |

Add to List **Cancel**

- Once a CVX code has been added, click the **VIS** button to associate any applicable VIS documents with the CVX code.

In the VIS Document Selection dialog, VIS Documents can be associated to a CVX code by highlighting the applicable code(s) in the VIS Documents column and clicking the > button. Or, they can be disassociated by highlighting the code(s) in the VIS Documents Associated with this CVX Code column and clicking the < button. Likewise, you can add, remove, and activate and inactivate (via Properties), VIS documents via the corresponding buttons at the bottom of the dialog.

Click the **OK** button when finished.



When a VIS document is attached to a CVX code the VIS button will become highlighted.

*****NOTE*****

The system will automatically default any VIS documents mapped to CVX Codes based on the CDC list. Click the Visit CDC's CVX Mapped to VIS List to view the CDC's mapping list.

- To add Manufacturers and Lot Numbers for the procedure, click the **New** button.
- In the Manufacturer field, enter or search for the proper **Manufacturer**.
- In the Trade Name field, enter the **Trade Name** for this immunization, if applicable.
- In the Product CVX Code field, enter or search for the **CVX code** for the manufacturer you are adding.

*****NOTE*****

The system will automatically default a CVX Code for applicable manufacturers based on the CDC's mapping list. Click the Visit CDC's Manufacturer's Product Mapped to CVX List to view the CDC's mapping list. NOTE: When searching for a CVX code in the Search List dialog, you can add, remove, and edit the description of CVX (via Properties) by clicking the corresponding button.

- In the Lot Number field, enter applicable **Lot Number** for this immunization.
- In the Lot Expiration field, check the date box, and then enter or select the applicable **Expiration Date** for the lot number.

11. In the Funding field, click the Public or Private radio button, as applicable.

Immunization Manufacturers & Lot Numbers

[Visit CDC's CPT Mapped to CVX List](#)

Procedure: 90707 MMR VACCINE, SC

CPT4 Code: 90707

CVX Code: 03 MMR VIS

Manufacturers and Lot Numbers for this Procedure:

Lot Expiration	Trade Name	Manufacturer	Lot Number	Funding	CVX
2/5/2019		Abbott Laboratories	123123	Private funds	03

[Visit CDC's Manufacturer's Product Mapped to CVX List](#)

Manufacturer: Abbott Laboratories

Trade Name:

When left blank, the Product CVX Code will inherit the Procedure level CVX Code for the Manufacturer.

Product CVX Code: 03 MMR

Lot Number: 123123

Lot Expiration: 02/05/2019

Funding: Private funds

Add to List Cancel

12. Click the **Add To List** button.

13. Repeat steps 5 - 12 to add additional manufacturers and lot numbers, as needed.

14. When all applicable manufacturer and lot number information has been added for this procedure, click the **Close** button.

15. In the Procedure screen, click the **Save** button.

ADD AN IMMUNIZATION ENTRY FOR A PATIENT

If a procedure was not configured at the time of charge entry, or if you need to enter an Immunization entry without adding a charge, you can add it manually in the Immunization tab of the Clinical screen. Use the following steps to manually add Immunization information for a patient.

1. In Practice Manager, click the **Clinical** tab.
2. Enter or search for the patient's **Account #** for whom you would like to add an Immunization record.
3. Click the **Immunizations** tab.
4. Click the **New** button.
5. In the Immunization Entry dialog, enter or search for the **Immunization Procedure**.
6. Check the **Service Date** option, and then enter or select the date of service for the immunization record.
7. In the Manufacturers and Lot Numbers for this Procedure section, you can select applicable Lot and Manufacturer information that was entered previously for this immunization procedure and have that information populate the corresponding fields in the Immunization section below allowing you to enter this data more efficiently and effectively when this immunization is administered. To do this, highlight the applicable **Manufacturer and Lot Number** entry in this section, and that information will default into the corresponding fields in the Immunization section below.
8. In the Vaccination Information Statement section, you can select and configure **Groups, VIS Documents**, and **Presented** dates for applicable vaccine procedures. Multiple documents and dates can be configured when applicable. To add a group, click the adjacent checkbox next to the applicable group **Name**. You can then select the appropriate **VIS Document** and modify the **Presented** date by clicking into the date field and then selecting the correct date as needed.
9. In the Immunization section, enter or search for the **Provider** associated with this immunization.
10. You can then enter, modify, or search for the **Manufacturer** and **Lot Number** you want to attach to the immunization record.
11. Check the **Lot Expiration** option and then enter or select the **Expiration Date** for the Lot Number, if applicable.
12. Enter or search for the **VFC Eligibility Code** you want to attach to the immunization record, if applicable.
13. Select the applicable **NDC Code** for this immunization in the corresponding field, if needed.

NOTE

The NDC field drop-down will contain any NDC codes that were configured in the procedure file. When entering a new immunization entry in the Immunization tab of the Clinical screen, the NDC code that was tagged as the primary in the procedure file will default into the NDC Code field. If the immunization procedure was entered as a charge in the Charge screen, the NDC Code field will contain the NDC code selected there and you can modify this field as needed. Primary NDC codes will be designated with a **(P)** after the code.

14. Enter or search for the **CVX Code** you want to attach to the immunization record, if applicable. The CVX code will default from the procedure file.
15. Select the **Funding** for this immunization, if applicable. This field will default the funding option configured when adding immunization information for the procedure.
16. Check the **Disease Immunity** option when a patient cannot receive a vaccination because they have already been exposed to the disease. For example, a child who has had the chicken pox cannot be subsequently vaccinated against the chicken pox.

17. Check the **Historical** option to indicate that the office did not administer the immunization and it is being entered as a historical immunization for the patient. Likewise, when information is sent to PASIIS, an immunization procedure that is tagged as Historical will have a registry status of 01; if this box is left unchecked then the registry status will appear as 00.

When the **Historical** option is checked, in the **Source** field you can select the applicable **Immunization Information Source**. This information is required for Meaningful Use Stage 2.

18. Enter or search for the **Dose, Route, Site** information for the immunization in the corresponding fields.
19. Enter or search for the **Administered By** for the immunization. Do note, when entering a new immunization, this field will default to the current user.
20. Enter or search for the **Facility** in which the immunization was administered.

*****NOTE*****

Whenever you are adding an immunization entry for a patient, and there is an immunization registry (PASIS, MD ImmuNet, PASIS, PASIS, PASIS, PhilaVax, VIIS, etc.) configured in your system, the **Provider Name, Manufacturer, Lot Number, Lot Expiration, VFC Eligibility, CVX Code, Funding, and Dose** (including unit of measure) fields are required before you will be able to save the immunization entry. A red exclamation point will appear next to the field that is missing the required information. However, these requirements are bypassed if the **Disease Immunity** or **Historical** options are selected, or if there are no immunization registries configured in your system.

21. In the Immunization Consent section, enter the **First Name, Last Name, and Consent Date**, select the **Relationship**, and check the **Consent for Immunization** and **Permission to Share** options if applicable.

*****NOTE*****

The Consent for Immunization and Permission to Share options are not used *when sending immunization information to registries via the HL7 2.5.1 format*. Consent for sending immunization information to registries in the HL7 2.5.1 format is entered via the Consent dialog accessed via the Patient screen in Practice Manager, or the ID tab in Clinical. However, the Consent for Immunization option should still be configured at the procedure level (in the Order Procedure dialog in Clinical, and/or the Immunization Entry dialog in Practice Manager) to provide accurate documentation within the chart note and patient's record, when applicable.

22. When finished adding the Immunization information, click the **Save** button.
23. Click the **Next Account** button when finished. Once the Next Account button has been clicked, the immunization information will be sent to the immunization registry

EDIT AN IMMUNIZATION ENTRY FOR A PATIENT

If a procedure was not configured at the time of charge entry, or if you need to enter an Immunization entry without adding a charge, you can add it manually in the Immunization tab of the Clinical screen. Use the following steps to manually add Immunization information for a patient.

1. In Practice Manager, click the **Clinical** tab.
2. Enter or search for the patient's **Account #** for whom you would like to add an Immunization record.
3. Click the **Immunizations** tab.
4. Highlight the Immunization entry you want to modify, and then click the **Edit** button.

*****NOTE*****

If you click the **Show Descriptions** option the Provider, Eligibility, Manufacturer, and Relationship columns will display the description of the respective data. When this option is disabled (unchecked) the IH Code will be displayed for the respective data for these items.

5. Modify the **Service Date** for the immunization record, if needed.
6. In the Manufacturers and Lot Numbers for this Procedure section, you can select applicable Lot and Manufacturer information that was entered previously for this immunization procedure and have that information populate the corresponding fields in the Immunization section below allowing you to enter this data more efficiently and effectively when this immunization is administered. To do this, highlight the applicable **Manufacturer and Lot Number** entry in this section, and that information will default into the corresponding fields in the Immunization section below.
7. In the Vaccination Information Statement section, you can select and configure **Groups, VIS Documents, and Presented** dates for applicable vaccine procedures. Multiple documents and dates can be configured when applicable. To add a group, click the adjacent checkbox next to the applicable group **Name**. You can then select the appropriate **VIS Document** and modify the **Presented** date by clicking into the date field and then selecting the correct date as needed.
8. In the Immunization section, enter, modify, or search for the **Provider, Manufacturer, and Lot Number** you want associated with the immunization record.
9. Check the **Lot Expiration** option and then enter or select the **Expiration Date** for the Lot Number, if applicable.
10. Enter, modify, or search for the **VFC Eligibility Code** you want to attach to the immunization record, if applicable.
11. Select the applicable **NDC Code** for this immunization in the corresponding field, if needed.

*****NOTE*****

The NDC field drop-down will contain any NDC codes that were configured in the procedure file. When entering a new immunization entry in the Immunization tab of the Clinical screen, the NDC code that was tagged as the primary in the procedure file will default into the NDC Code field. If the immunization procedure was entered as a charge in the Charge screen, the NDC Code field will contain the NDC code selected there and you can modify this field as needed. Primary NDC codes will be designated with a **(P)** after the code.

12. Enter or search for the **CVX Code** you want to attach to the immunization record, if applicable. The CVX code will default from the procedure file.
13. Select the **Funding** for this immunization, if applicable. This field will default the funding option configured when adding immunization information for the procedure.
14. Check the **Disease Immunity** option when a patient cannot receive a vaccination because they have already been exposed to the disease. For example, a child who has had the chicken pox cannot be subsequently vaccinated against the chicken pox.

15. Check the **Historical** option to indicate that the office did not administer the immunization and it is being entered as a historical immunization for the patient. Likewise, when information is sent to PASIIS, an immunization procedure that is tagged as Historical will have a registry status of 01; if this box is left unchecked then the registry status will appear as 00.

When the **Historical** option is checked, in the **Source** field you can select the applicable **Immunization Information Source**. This information is required for Meaningful Use Stage 2.

16. Enter, modify, or search for the **Dose, Route, Site** information for the immunization in the corresponding fields.
17. Enter, modify, or search for the **Administered By** for the immunization. Do note, when entering a new immunization, this field will default to the current user.
18. Enter, Modify, or search for the **Facility** in which the immunization was administered.

*****NOTE*****

Whenever you are adding an immunization entry for a patient, and there is an immunization registry (PASIS, MD ImmuNet, PASIS, PASIS, PASIS, PhilaVax, VIIS, etc.) configured in your system, the **Provider Name, Manufacturer, Lot Number, Lot Expiration, VFC Eligibility, CVX Code, Funding, and Dose** (including unit of measure) fields are required before you will be able to save the immunization entry. A red exclamation point will appear next to the field that is missing the required information. However, these requirements are bypassed if the **Disease Immunity** or **Historical** options are selected, or if there are no immunization registries configured in your system.

19. In the Immunization Consent section, enter the **First Name, Last Name, and Consent Date**, select the **Relationship**, and check the **Consent for Immunization** and **Permission to Share** options if applicable.

*****NOTE*****

The Consent for Immunization and Permission to Share options are not used *when sending immunization information to registries via the HL7 2.5.1 format*. Consent for sending immunization information to registries in the HL7 2.5.1 format is entered via the Consent dialog accessed via the Patient screen in Practice Manager, or the ID tab in Clinical. However, the Consent for Immunization option should still be configured at the procedure level (in the Order Procedure dialog in Clinical, and/or the Immunization Entry dialog in Practice Manager) to provide accurate documentation within the chart note and patient's record, when applicable.

20. When finished adding the Immunization information, click the **Save** button.
21. Click the **Next Account** button when finished. Once the Next Account button has been clicked, the immunization information will be sent to the immunization registry

DELETE AN IMMUNIZATION RECORD FOR A PATIENT

Use the following steps to delete an Immunization entry for a patient.

1. In Practice Manager, click the **Clinical** tab.
2. Enter or search for the patient's **Account #** for whom you would like to add an Immunization record.
3. Click the **Immunizations** tab.
4. Highlight the Immunization entry you want to modify, and then click the **Edit** button.

*****NOTE*****

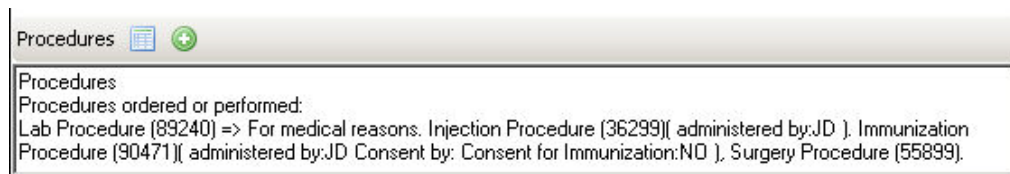
If you click the **Show Descriptions** option the Provider, Eligibility, Manufacturer, and Relationship columns will display the description of the respective data. When this option is disabled (unchecked) the IH Code will be displayed for the respective data for these items.

5. At the Are you sure you want to delete this record prompt, click the **Yes** button.
6. When finished, click the **Next Account** button.

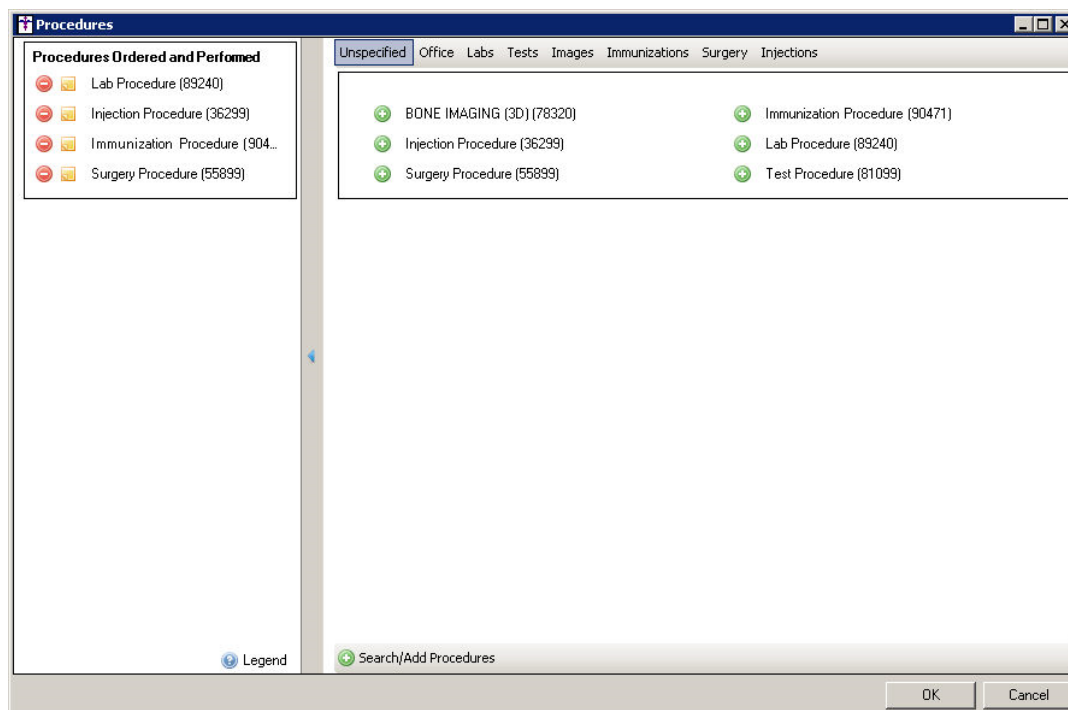
Configure Immunization Information for a Patient in Clinical

Immunization procedures are selected via a procedure checklist in the patient's chart note. Once the procedure is selected the Order Procedure dialog will appear allowing you to configure the applicable information. Use the following steps to configure the immunization information in the Order Procedure dialog.

1. Open the patient's chart, and then open or create a note.
2. In the applicable procedure checklist, click the **Open Procedure Checklist**  button in the checklist bar to access the Procedure dialog.



3. Select the **Procedure** you want to perform or modify from the appropriate checklist in the chart note.



4. Enter or modify the applicable procedure information as needed.

- When entering or modifying an Immunization Procedure, the Order Procedure dialog will have a Manufacturers and Lot Numbers for this Procedure section, a Vaccination Information Statement section, an Immunization section, and an Immunization Consent section.

The Manufacturers and Lot Numbers for this Procedure section allows you to select applicable Lot and Manufacturer information that was entered in Practice Manager for this immunization procedure (see pages 19 -21) and have that information populate the corresponding fields in the Immunization section below allowing you to enter this data more efficiently and effectively when this immunization is administered. To do this, highlight the applicable **Manufacturer and Lot Number** entry in this section, and that information will default into the corresponding fields in the Immunization section below.

In the Vaccination Information Statement section, you can select and configure **Groups**, **VIS Documents**, and **Presented** dates for applicable vaccine procedures. Multiple documents and dates can be configured when applicable. To add a group, click the adjacent checkbox next to the applicable group **Name**. You can then select the appropriate **VIS Document**, and then modify the Presented date by clicking into the date field and then selecting the correct date as needed.

In the Immunization section, the Provider Name field will default to the provider associated with the chart. You can then enter or modify the **Manufacturer** (required for PASIIS and PASIIS), **Lot Number** (required for PASIIS), **Lot Expiration**, **VFC Eligibility**, **NDC Code** (this field will default the primary NDC Code from the procedure file indicated by a **(P)** after the code), **CVX Code** (this code will default from the procedure file), **Dose**, **Route**, **Site**, **Administered By** (when entering a new immunization procedure, this field will default to the current user), and **Facility** information for the immunization as needed. You can search Manufacturer, VFC Eligibility, CVX Code, Dose, Route, Site, Administered By, and Facility information by clicking the corresponding lookup buttons.

Select the **Funding** for this immunization, if applicable. This field will default the funding option configured when adding immunization information for the procedure in Practice Manager.

Order Procedure

Procedure: DTAP-HEP B-IPV VACCINE, IM Result:

Order Date: 06/01/2017 14:57:09 Comments:

Order Priority: ☐ Routine ☐ Stat Target Date: 06/01/2017

Procedure Modifiers: 1P

Procedure Diagnoses: ICD10: You have 5 remaining

SNOMED Selection

Double click an item or Search to add a SNOMED code.

Item Description	Apply	SNOMED
DTAP-HEP B-IPV VACCINE, IM	☒	Immunization (127785005)
Mod 1: For medical reasons	☒	First diphtheria and tetanus do...
	☒	Drug allergy (416098002)

User Defaults: Save Restore

SNOMED: Search Delete

Manufacturers and Lot Numbers for this Procedure

Lot Expiration	Manufacturer	Lot Number	Trade Name	Funding
6/30/2014	Acambis, Inc	141234	Effective Immunization	Private funds
7/1/2014	Avion	123123		Private funds

Click a Manufacturer row above to fill the immunization entry fields below.

Vaccination Information Statement

Group	VIS Document	Presented
☒ POLIO		06/01/2017
☒ HepB	05/17/2007 - Diphtheria/Tetanus/Pert...	06/01/2017
☒ DTAP	02/02/2012 - Hepatitis B VIS	06/01/2017

Immunization

Provider Name: Smith, Doctor NDC Code: 13423123238 (P) Dose: mL

Manufacturer: Acambis, Inc CVX Code: 110 Route:

Lot Number: 141234 Lot Expiration: 06/30/2017 Site:

VFC Eligibility: Funding: Administered By: John Doe

☐ Disease Immunity ☐ Historical Source: New immunization record Facility:

Immunization Consent

First Name: Relationship: ☐ Consent for Immunization

Last Name: Consent Date: 06/08/2017

Comment: Edit...

☐ Procedure Not Performed ☐ Queue Charge ☐ Create Order Send To:

☐ Initial order created outside of Clinical Help OK Cancel

Check the **Disease Immunity** option when a patient cannot receive a vaccination because they have already been exposed to the disease. For example, a child who has had the chicken pox cannot be subsequently vaccinated against the chicken pox. Do note, that this option should be used in conjunction with the **Procedure Not Performed** option, which when checked will be automatically mapped to LOINC code '56784-9 – Disease with presumed immunity'. This will be sent in the file.

Check the **Historical** box to indicate that the office did not administer the immunization and it is being entered as a historical immunization for the patient. Likewise, when information is sent to PASIIS, an immunization procedure that is tagged as Historical will have a registry status of 01; if this box is left unchecked then the registry status will appear as 00.

When the **Historical** option is checked, in the **Source** field you can select the applicable **Immunization Information Source**. This information is required for Meaningful Use Stage 2.

*****NOTE*****

Whenever you are adding or editing an immunization procedure, and there is an immunization registry (PASIIS, MD ImmuNet, PASIIS, PASIIS, PASIIS, PhilaVax, VIIS, etc.) configured in your system, the **Provider Name, Manufacturer, Lot Number, Lot Expiration, VFC Eligibility, CVX Code, Funding, and Dose** (including unit of measure) fields are required before you will be able to save the procedure information. A red exclamation point will appear next to the field that is missing the required information. However, these requirements are bypassed if the **Disease Immunity, Historical, or Procedure Not Performed** options are selected, or if there are no immunization registries configured in your system.

In the Immunization Consent section, enter **First** and **Last** name, **Relationship** (of the person giving consent), and then enter or select the **Consent Date**. Check the **Consent for Immunization** and **Permission to Share** options if applicable.

*****NOTE*****

The Consent for Immunization and Permission to Share options are not used *when sending immunization information to registries via the HL7 2.5.1 format*. Consent for sending immunization information to registries in the HL7 2.5.1 format is entered via the Consent dialog accessed via the Patient screen in Practice Manager, or the ID tab in Clinical. However, the **Consent for Immunization** option should still be configured at the procedure level (in the Order Procedure dialog in Clinical, and/or the Immunization Entry dialog in Practice Manager) to provide accurate documentation within the chart note and patient's record, when applicable.

6. When finished configuring the immunization information, enter or modify any other applicable procedure information, and then click the **OK** button.
7. **Save** the chart note. After the note is saved, the immunization information will be sent to the immunization registry.

View Submission Status for Immunizations

The Submission Status dialog allows you to view the submission status of immunizations for bidirectional registries. This Submission Status can be viewed in the Clinical and Practice Manager applications. Use the following steps to view Submission Status information.

1. In Clinical, click **Chart > Registries > Immunization > Submission Status**. Or, in Practice Manager, click **Administration > Registries > Immunization > Submission Status**. Or, in the Immunization sub-tab of the Clinical screen in Practice Manager, click the **Submission Status** button.
2. In the Filter Options section you can filter the submission status results by specific **Registry** (if there is more than one), **Account #** (for a single patient), **Practice**, **Status** (<All>, Connection Error, Excluded, Failed, Invalid Data, Not Registered, Not Sent, and Successful), and **Send From/To** date range. Enter or select these filter items in the corresponding fields as needed.

NOTE

When <All> is selected in the Registry field, the bottom of the dialog will have Sent Date and Status columns for all applicable registries. When a specific registry is selected, the columns will display Sent Date and Status columns for only that selected registry.

3. Once the submission status results are displayed, if the immunization was created in Practice Manager, you can modify that immunization by highlighting it, and then clicking the **Edit** button. Once the information has been modified as needed in the Immunization Entry dialog, click the **Save** button.

If the immunization was entered via a note in Clinical, then you may view the immunization by clicking the **View** button; however, you must return to the note it was created in, to modify it.

NOTE

When an immunization failed, or in there is invalid data, you must hover over the status indicator in the Status column to view the error message.

4. To resubmit an immunization record, highlight the applicable record, and then click the **Resubmit** button.

NOTE

You can select multiple immunization records to be resubmitted, when a single registry is selected in the Registry field. If a singled Registry is selected, simply highlight the applicable immunization records, and then click the **Resubmit** button.

5. Click the **Close** button to exit the Submission Status dialog.

DHIN DELVAX Sent Date	DHIN DELVAX Status	PA-SIIS Sent Date	PA-SIIS Status	Practice	Account Number	Service Date	Procedure	Description
N/A	Not Registered	09/10/2014 07:56:11 AM	Successful	1	68185	09/05/2014	90703	Tetanus Toxoid
N/A	Not Registered	09/10/2014 07:15:18 AM	Successful	1	68185	09/05/2014	90714	Tetanus & Diphtheria for ...
N/A	Not Registered	09/10/2014 01:37:44 PM	Successful	TF	68198	09/09/2014	90715	Tdap vaccine
N/A	Not Registered	09/10/2014 01:37:53 PM	Successful	TF	68198	09/09/2014	90714	Tetanus & Diphtheria for ...
N/A	Not Registered	09/10/2014 01:37:57 PM	Successful	TF	68198	09/09/2014	90712	MMR
N/A	Not Registered	09/09/2014 04:45:34 PM	Successful	TF	34567	09/09/2014	90658	Flu Injection
N/A	Not Registered	09/09/2014 04:59:05 PM	Successful	TF	34567	09/09/2014	90706	Rubella

* Not Sent

Refresh Resubmit Edit Close

View PASIIS Registry Records for a Patient

The Registry Records dialog allows you to download and view registry records for a patient. The Registry Records dialog can be accessed in Clinical or Practice Manager. Use the following steps to view PASIIS registry records for a patient.

1. In Clinical, click **Chart > Registries > Immunization > View Registry Records**. Or, in Practice Manager, click **Administration > Registries > Immunization > View Registry Records**.
2. In the Registry field, select **PASIIS v 2.5.1**.
3. Enter or search for the patient's **Account #** that you want to download and view registry records.
4. Click the **Download** button.
5. After the report is downloaded, it will be displayed below. If multiples exist, highlight the record you want to view from the Registry Records column, and it will be displayed in the Record Detail window. Once a registry record is highlighted, you can **Print** or **Delete** the record as needed by clicking the corresponding button. Click **Refresh** to update Registry Records if additional downloads have occurred. Also, you can multi-select in the Registry Records column to delete multiple downloaded records at once.
6. When finished, click the **Close** button.

The screenshot shows the 'Registry Records' dialog box. At the top, there's a section 'Download Records from this Registry' with a dropdown menu set to 'PA-SIIS v 2.5.1' and a text field for 'Account #' containing '10062'. To the right of the text field is a small icon and the name 'Jon Smith'. A 'Download' button is on the far right. Below this is a 'Registered' status with the date '09/04/2014'. The main area is split into two panes: 'Registry Records' on the left and 'Record Detail' on the right. The 'Registry Records' pane has a list with a header 'Select to View Detail' and one entry: '09/04/2014 03:45:04 PM'. The 'Record Detail' pane shows 'Patient's Record from PA-SIIS v 2.5.1' and 'Downloaded: 9/4/2014 3:45:04 PM'. It lists details for three records: 90724 (influenza, NOS), 90714 (typhoid, NOS), and 90705 (measles). Each record has fields for Provider, Manufacturer, Lot Number, Lot Expiration, and Disease Immunity. To the right of these fields are service details: Service Date (06/24/2014), Dose, Route, Site (RA) Right Arm, Administered By (CMaker Administrator), and Facility. At the bottom of the dialog are buttons for 'Print', 'Delete', 'Refresh', and 'Close'. A status bar at the bottom left says 'Gray = No Records Available'.

Registry Records	Record Detail
Select to View Detail	Patient's Record from PA-SIIS v 2.5.1
09/04/2014 03:45:04 PM	Account #: 10062 - Jon Smith DOB: 01/01/1900 Downloaded: 9/4/2014 3:45:04 PM
	90724 influenza, NOS Provider: Manufacturer: Lot Number: 8 Lot Expiration: Disease Immunity: No Service Date: 06/24/2014 Dose: Route: Site: (RA) Right Arm Administered By: CMaker Administrator Facility:
	90714 typhoid, NOS Provider: Manufacturer: Lot Number: Lot Expiration: Disease Immunity: No Service Date: 06/24/2014 Dose: Route: Site: Administered By: CMaker Administrator Facility:
	90705 measles Service Date: 06/24/2014

View the Unregistered Patients Report

In Practice Manager you can run the Clinical Immunizations – Unregistered Patients report that will list patients who are not registered with the Registry, but have immunizations waiting to send. Use the following steps to run this report.

1. In Practice Manager, click the **Reports** tab, and then click the **Clinical** sub-tab.
2. Click the **+** sign next to **Clinical Immunizations** report type.
3. Click the **Unregistered Patients** report.
4. Add or modify the **Sort Criteria** and/or the **Select Criteria**, as needed.

*****NOTE*****

You can configure the Select Criteria to run the report for a certain Service Date, or Service Date range.

5. Click the **Preview** or **Print** button.

Test Practice MTA					
User: ryan.dh.m		Form: clin.unhd02.rpt			
09/08/2014 12:54:26		CLINICAL IMMUNIZATIONS (Unregistered Patients)			
		PAGE 1			
Practice	Account	Patient	Service Date	Procedure	Provider
1	10024	Brown, Bobby	09/03/2014	90707	502
1	10039	Martin, Baby	08/25/2014	90715	TEST
1	10044	Akin, Bobby	08/14/2014	90707	502
1	10083	Byrne, Ida	05/14/2014	90658	KOB
			07/16/2014	90658	502
1	1483	Alba, Celeste	08/22/2014	90718	502
Registry: DHIN DELVAX v 2.5.1			Unique Unregistered Patients:		5
1	10024	Brown, Bobby	09/03/2014	90707	502
1	10039	Martin, Baby	08/25/2014	90715	TEST
1	10044	Akin, Bobby	08/14/2014	90707	502
1	10083	Byrne, Ida	05/14/2014	90658	KOB
			07/16/2014	90658	502
1	1483	Alba, Celeste	08/22/2014	90718	502
Registry: PA-SIIS v 2.5.1			Unique Unregistered Patients:		5
Practice Codes: 1			Unique Unregistered Patients:		5
TOTALS			Unique Unregistered Patients:		5
			Unregistered Patients for all Registries:		10

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Document Change Log

Date	Change
02/22/19	Initial Release.