ChartMaker® Immunization Setup Quick Reference Card

Practice Manager Setup

Adding a Procedure

- Click the **Administration** menu option
- Click **Transaction Tables**
- Click **Procedure**
- Enter an **IH Code** and click Tab
- Enter a **Description**, **CPT4 Code**, **Amount**, **TOS**, **POS**, and any other applicable fields
- Click the **Immunization** button
- Click the lookup icon for **CVX Code** to select or add the correct code (*see detailed instructions below)
- Click **VIS** and select the applicable document/date (*see detailed instructions below if the data is not present) and click **OK**
- Click **Close**
- Click **Save**
- Click **Cancel**

Please reference the immunization manual or Practice Manager Help for more details and/or call Support if you need assistance with this or any of the steps outlined in this document.

Adding Q Codes

If your CPT4 code is a Q Code:

- Click the **Administration** menu option
- Click **Transaction Tables**
- Click **Procedure**
- Lookup/select the applicable **Q Code**
- Change the **CPT 4 Code** field to the appropriate 9xxxx code
  (reference the immunization manual on our website for details)
- Click **Billing codes**
- Click **New**
- From the Billing Form dropdown, select **NJMCR_P5** or **NEIC**
  (**NEIC ONLY if you are a Provider complete office)
- In the Override Data section, click in the **Override** column and type the **Q Code** that is being used
- Click **Add to List**
- Click **New** again and repeat those steps for any paper forms that you use
- Click **Close**
- Click **Save**
- Click **Cancel**

Adding a CVX Code

Immunization procedures must have a valid CVX code attached. A list of valid immunization procedures and the related CVX Codes can be accessed through the links in the procedure entry screen OR by going to www.CDC.gov.

- Click the **Administration** menu option
- Click **Transaction Tables**
- Click **Procedure**
- Select the applicable immunization **procedure**
- Click the **Immunization** button
- Click the lookup icon for **CVX Code**
- **Search** for the CVX code to confirm that it does not already exist in your database
- Click **Add**
- Enter the appropriate **CVX Code** and **Description**
- Click **OK**
- Highlight the **CVX Code** you just added
- Click **OK**
- Click **Close**
- Click **Save**
- Click **Cancel**

NOTE: CVX codes MUST be added in order to transmit a code to the registry or they will appear as non-immunization codes on the Invalid Data Report.

Adding a VIS Statement

- Click the **Administration** menu option
- Click **Transaction Tables**
- Click **Procedure**
- Select the applicable immunization **procedure**
- Click the **Immunization** button
- Click **VIS**
- **Search** for the VIS Document to confirm that it does not already exist in your database
- Click **Add**
- Enter the **Document Name** and **Edition Date**
  NOTE: You can find this information on the CDC website, which can be accessed by clicking the "Visit CDC's VIS Document List" link. (Copy the appropriate VIS description from the website and paste it in the Document Name field.)
- Click **OK**
- Highlight the **VIS Document** you just added
- Click **>**
- Click **OK**
- Click **Close**
- Click **Save**
- Click **Cancel**

NOTE: VISs are updated only when they need to be, such as if there were a change in ACIP recommendations affecting the vaccine's adverse event profile, indications, etc. Check the CDC's VIS website on a regular basis for updates.

ChartMaker® Immunization Setup Quick Reference Card

Practice Manager Setup (con't)

Designating a Procedure as an Immunization

- Click the **Add-Ins** menu option
- Click **Clinical**
- Click **Immunizations**
- Click **Procedure**
- Highlight **all procedures that are immunizations** from the left
  TIP: Press the Ctrl key while clicking to select multiple
- Click **Add >>**
- Click **Save**

Removing Duplicate Immunizations

- Click the **Add-Ins** menu option
- Click **Clinical**
- Click **Immunizations**
- Click **Procedures**
- **Highlight** the immunization procedures that you added during "designating a procedure as an immunization" (located in the Selected Procedures section) or click **Select All** from the bottom of the Selected Procedures section
- Click **<< Remove**
- Click **Save**

Pre-Configuring Immunization Information

NOTE: This is NOT a required step. It merely saves time when entering data in Clinical and/or Practice Manager.

- Click the **Administration** menu option
- Click **Transaction Tables**
- Click **Procedures**
- Click the **Immunization** button
- Click **New**
- Enter the applicable information, including **Manufacturer**, **Lot Number**, **Lot Expiration**, **VIS**, **Funding**, **etc.**
- Click **Add to List**
- Click **Close**
- Click **Save**
- Click **Cancel**

ChartMaker® Clinical Setup

Designating a Procedure as an Immunization

- Click the **Edit** menu option
- Click **System Tables...**
- Click **Conditions**
- Click **Procedures**
- Search for and **highlight** the procedure
- Click **Properties**
- In the **Type** field, select **Immunization**
- Click **Save**
- Click **Close**

Entering Immunization Data

Practice Manager

- Click the **Clinical** tab
- **Lookup/Select** the patient
- Click the **Immunizations** sub-tab
- Click the **New** button
- Enter the **Procedure** code or click the Lookup icon to search the database
- Enter **Service Date**, **Provider**, **Manufacturer**, **Lot Number**, **Route**, **Site**, **VIS** and **VFC** information

  NOTE: If you are a VFC client, please ensure you are using only valid and recommended V codes. If you are NOT a VFC client, you can select V01.
  If the immunization was not administered by you, check the box for "**Historical**" and identify the source from the drop down on the right.

- Click **Save**

Clinical

- Open the patient's **chart**
- Click on **Note tab** > **New Note** and select appropriate note
- From a procedure checklist, click the **+ sign** for the **immunization procedure**
- Enter **Diagnosis**, **VIS**, **Manufacturer**, **Lot Number**, **VFC Eligibility**, **Route** and **Site** information

  NOTE: If you are a VFC client, please ensure you are using only valid and recommended V codes. If you are NOT a VFC client, you can select V01.
  If the immunization was not administered by you, check the box for "**Historical**" and identify the source from the drop down on the right.

- Click **OK** to close the Order Procedure dialog
- Click **OK**

If any of the required information is missing, your data will be flagged for being incomplete.