

ChartMaker® Bi-Directional Immunization Quick Reference Card

Patient Consent

Practice Manager

- Select the **Patient** tab
- Enter **Account #** and press enter. Or use the patient lookup to search for your patient.
- Click the **Consent** Button
- Select the **Registry Name**
- **Do not send patient's immunizations to this registry** checkbox and **Effective Date**. If this is selected no immunization data for this patient will send to the Registry prior to the entered Effective Date.
- Enter **Registry Status** of 'Active' and enter **Effective Date**
- Enter **Reminder Preference** and enter **Effective Date**
- **Protect immunization data from other clinicians: and Effective Date**
Select **Yes**: Protect my patient data from other Providers (Sharing is NOT OK)
Select **No**:-It is not necessary to protect my patient data from other Providers (Sharing is OK)
- Click the **OK** button
- Click the **Save** button on the patient account

ChartMaker

- Open a **Patient Chart**
- Click the **ID** tab
- Click the **Consent** Button
- Select the **Registry Name**
- **Do not send patient's immunizations to this registry** checkbox and **Effective Date**. If this is selected no immunization data for this patient will send to the Registry prior to the entered Effective Date.
- Enter **Registry Status** of 'Active' and enter **Effective Date**
- Enter **Reminder Preference** and enter **Effective Date**
- **Protect immunization data from other clinicians: and Effective Date**
Select **Yes**: Protect my patient data from other Providers (Sharing is NOT OK)
Select **No**:-It is not necessary to protect my patient data from other Providers (Sharing is OK)
- Click the **OK** button
- Click the **Save** button on the patient chart

Register a Patient

Practice Manager

- Click the **Administration** menu option
- Click **Registries**
- Click **Immunization**
- Click **Register a Patient**
- Select your **Registry**
- Enter **Account #** and press enter. Or use the patient lookup to search for your patient.
- Click the **Submit** button

ChartMaker

- Click the **Chart** menu option
- Click **Registries**
- Click **Immunization**
- Click **Register a Patient**
- Select your **Registry**
- Enter **Account #** and press enter. Or use the patient lookup to search for your patient.
- Click the **Submit** button

Patient Match

- If patient matches are found, the radio button **The name selected in the list below matches this patient** will be selected
- Select the checkbox on the correct patient match
- Select the **OK** button
- The user will be returned to **Register Patient** screen. The patient status will display **Registration Pending** if there are no immunization records to send. The patient status will display **Registered** if immunization records were sent to the Registry.
- If the wrong patient match is selected by mistake, please contact your State Registry to correct

No Patient Match

- If **NO** patient matches are found, the radio button **No matches found** will be selected
- The user will be returned to **Register Patient** screen. The patient status will display **Registration Pending** if there are no immunization records to send. The patient status will display **Registered** if immunization records were sent to the Registry.
- Select the **OK** button

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Submission Status	
<p style="text-align: center;">Practice Manager</p> <ul style="list-style-type: none"> ➤ Click the Administration menu option ➤ Click Registries ➤ Click Immunization ➤ Click Submission Status (This will display ALL results for ALL accounts) <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> ➤ Click the Clinical tab ➤ Enter Account # and press enter. Or use the patient lookup to search for your patient. ➤ Click the Immunization tab ➤ Click the Submission Status Button. (This will only display results for the one account) <p>NOTE: Filter Options will default to <ALL>, this can be changed if needed</p>	<p style="text-align: center;">ChartMaker</p> <ul style="list-style-type: none"> ➤ Click the Chart menu option ➤ Click Registries ➤ Click Immunization ➤ Click Submission Status <p>NOTE: Filter Options will default to <ALL>, this can be changed if needed</p>
<p style="text-align: center;">Status - Successful</p> <ul style="list-style-type: none"> ➤ If the Registry Status is Successful, the Registry accepted the immunization record, and no errors or warnings were returned 	<p style="text-align: center;">Status - Failed</p> <ul style="list-style-type: none"> ➤ If the Registry Status is Failed, the Registry rejected the immunization record ➤ Hover your cursor over the word Failed. The reason for the rejection or warning will display ➤ Correct the missing or invalid immunization data. If the immunization record was added in ChartMaker, the data must be corrected in ChartMaker. If the immunization record was entered in Practice Manager, the data must be corrected in Practice Manager. ➤ See section Resubmit a Failed Record to resubmit the immunization
Resubmit a Failed Record	
<p style="text-align: center;">Practice Manager</p> <ul style="list-style-type: none"> ➤ Click the Administration menu option ➤ Click Registries ➤ Click Immunization ➤ Click Submission Status ➤ Filter Options will default to <ALL>, this can be changed if needed ➤ Select the Failed immunization record ➤ Select the Resubmit button <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> ➤ Click the Clinical tab ➤ Enter Account # and press enter. Or use the patient lookup to search for your patient. ➤ Click the Immunization tab ➤ Click the Submission Status Button ➤ Select the patients Failed immunization record ➤ Click the Resubmit button 	<p style="text-align: center;">ChartMaker</p> <ul style="list-style-type: none"> ➤ Click the Chart menu option ➤ Click Registries ➤ Click Immunization ➤ Click Submission Status ➤ Filter Options will default to <ALL>, this can be changed if needed Select the Failed immunization record ➤ Select the Failed immunization record ➤ Click the Resubmit button

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Invalid Data Report

Practice Manager

- Click the **Administration** menu option
- Click **Registries**
- Click **Immunization**
- Click **Invalid Data Report**
- Will display all immunization records with Invalid Dose Units, Site Codes or Route Codes. Or Non-Immunization Procedures.

ChartMaker

- Click the **Chart** menu option
- Click **Registries**
- Click **Immunization**
- Click **Invalid Data Report**
- Will display all immunization records with Invalid Dose Units, Site Codes or Route Codes. Or Non-Immunization Procedures.

View Registry Records

Practice Manager

- Click the **Administration** menu option
- Click **Registries**
- Click **Immunization**
- Click **View Registry Records**
- Enter **Account #** and press enter. Or use the patient lookup to search for your patient.
- Click the **Download** button. If the Registry has any records to return, these records will display

ChartMaker

- Click the **Chart** menu option
- Click **Registries**
- Click **Immunization**
- Click **View Registry Records**
- Enter **Account #** and press enter. Or use the patient lookup to search for your patient.
- Click the **Download** button. If the Registry has any records to return, these records will display

Unregistered Patient Report

Practice Manager

This report will list patients who are not registered and have immunization(s) waiting to send. This report can be sorted by Procedure code, Service date, or Account Number.

- Click the **Reports** tab
- Click the **Clinical** tab
- Click the **Clinical Immunization** option
- Click the **Unregistered Patient** report