User Training

IRIS Training Handout

I. Introduction

IRIS, Iowa's Immunization Registry Information System, is a secure, confidential, population-based computerized system that contains immunization information for individuals of all ages residing in the State of Iowa. IRIS is a population-based web application containing consolidated demographic and immunization history information. IRIS performs a variety of functions for health care providers including:

- Recording immunizations, contraindications, and reactions
- Validating immunization history and providing immunization forecasts
- Producing recall and reminder notices, vaccine usage, and patient reports
- Managing vaccine inventory
- Ordering state supplied vaccines
- Sending and receiving patient and immunization messages via Data Exchange with provider organizations

Access to IRIS is available at https://iris.iowa.gov. By law, only authorized users are allowed to access immunization information in IRIS. Authorized users include heath care providers, local health departments, health plans, and schools. Health care providers may only obtain information specific to their own patients. Schools may only access records specific to their enrollees.

II. IRIS Resources

- IRIS Help Desk: 1-800-374-3958)
- Website: https://idph.iowa.gov/immtb/immunization/iris
- Online Help (Light bulb 💡)
- User Manual
- Webinars (Live and Pre-recorded)
- Self-guided online training videos, available online at https://iris.iowa.gov under the **Training** tab

III. Accessing IRIS

IRIS is a web application. A computer with an Internet connection and a web browser is required to access IRIS. Internet Explorer is the preferred web browser, and IRIS has only been tested using this browser. Other browsers such as Firefox, Chrome and Safari have not been tested and are not recommended with IRIS.

To access IRIS, launch a web browser and go to https://iris.iowa.gov. Below is the login page.

IRIS Training Handout

Common IRIS Tools, Windows, and Menus

IRIS is divided into several sections, and users may need to use the vertical scroll bar to view all sections.

1. **Home tab:**
   a. **Hot topics-** These messages inform users of important announcements regarding IRIS, such as any downtime expected for website maintenance or any other notes pertaining to the system. These are updated by IDPH staff. The date of the latest message is displayed. If there is more than one topic posted, click the link in the right corner to view previous topics.
   b. **Information about the Iowa Medical Countermeasures**
   c. **Public Information Record**
   d. **Disclaimer of** external websites
   e. **Help Desk Contact Information**
   f. **Public Immunization and Vision Screening Record Access**

2. **Forms tab:** Adobe Reader version 6.0 or higher is needed to read and open forms and reports in IRIS.

   IRIS Enrollment Forms
   a. **IRIS Site Enrollment Form:** This form must be completed and submitted to IRIS staff to request access as a new IRIS Organization, to create a new Admin User, or for new School Users.
   b. **IRIS individual user agreement:** This form must be completed by each IRIS user prior to accessing IRIS. The organization's Admin user is responsible for maintaining these signed forms for review by IDPH upon request.
   c. **Confidentiality policy**: All users must read and abide by the IRIS Confidentiality Policy.
   d. **Clinical/Medical Site FAQ**

Information for Parents/Guardians and Adults
- e. Parent/Adult FAQ
- f. Record request form
- g. Adult Record Request form

Immunization Record
- h. Master Index Card
- i. Certificate of Immunization
- j. Provisional Certificate of Immunization
- k. Certificate of Immunization Exemption – Medical
- l. Certificate of Immunization Exemption – Religious

IRIS User Manual
- m. IRIS User Manual

Data Exchange Specifications
- n. IRIS Flat File Specifications
- o. IRIS HL7 2.4 General Transfer Specifications
- p. IRIS HL7 2.5.1 Implementation Guide
- q. IRIS Real Time Data Exchange Guide
- r. IRIS Data Exchange Onboarding Procedures
- s. IRIS Data Exchange Onboarding Form
- t. IRIS Web Services Setup Guide
- u. IRIS HL7 Error Message Reference Guide
- v. IRIS Query Process Guide
- w. IRIS Vaccine Codes (PDF or XLS)

Policies
- x. Confidentiality Policy
- y. IRIS and HIPAA

3. **Related links tab:** This section contains numerous links to external websites which are relevant to immunizations.

4. **Training Section:** Information about webinars and view self-guided training videos is available.

5. **Online Help – light bulb:** This is the online help button which displays page-specific help for each page in the system.

Login to IRIS

To login each person MUST have his/her own login. Under no circumstance should user names and passwords be shared. All users must complete an IRIS user agreement, which is found under the Forms tab. There is a three-part, case-sensitive, login to authenticate users.

1. Enter the 5 digit **Org Code**, followed by the **Username**, and the **Password**.
2. Click **Login**.

■■■■■■

Additional Information:

- The Org Code is specific to each organization.
- Each person accessing IRIS must have his/her own individual account. User names and passwords cannot be shared.
- All users must complete a user agreement, which can be found under the Forms tab of the IRIS site.
- If a user's account is locked, the 'Forgot Password' button allows users to unlock their account and reset their password. Administrative Users within an organization can also unlock a user's account and reset passwords.
- Sessions will time out after 60 minutes of inactivity.
- Accounts are disabled after 90 days of inactivity.
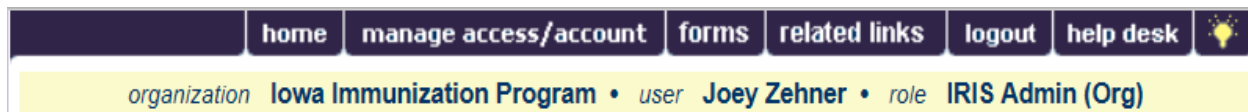- New passwords are required every 60 days.

■■■■■■

Menu Bar

Several menu options are listed across the top of IRIS and appear on every page:

| home | manage access/account | forms | related links | logout | help desk | 💡 |

- **Home**: Returns to the IRIS home page from anywhere within the application.
- **Manage Access/Account**: Loads the Manage Access/Account page.
- **Forms**: A list of links for printing blank forms and support documentation.
- **Related Links**: A list of links to other websites that contain information of interest to the immunization community.
- **Logout**: Logs users out of the current IRIS session.
- **Help Desk**: Displays contact information for the IRIS Help Desk.
- **Online Help**: Represented by a light bulb icon, online help displays page-specific help in a new window.
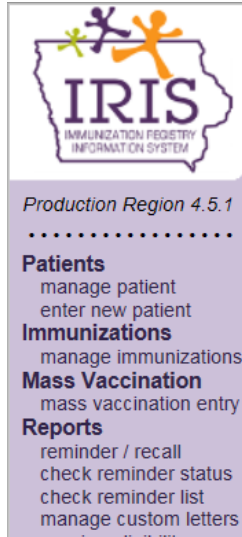
User Confirmation Bar

Directly beneath the menu bar is a row highlighted in light yellow. This row displays the organization, user, and role and remains at the top of each page in IRIS.

| home | manage access/account | forms | related links | logout | help desk | 💡 |

organization **Iowa Immunization Program** • *user* **Joey Zehner** • *role* **IRIS Admin (Org)**

Menu Panel

The menu panel is purple and appears on the left side of all screens in IRIS. Selections in the menu panel are links used to navigate IRIS. They are grouped under categories including: Patients, Immunizations, Reports, Inventory, Maintenance, and others.

IRIS Training Handout

Production Region 4.5.1

Patients
  manage patient
  enter new patient
Immunizations
  manage immunizations
Mass Vaccination
  mass vaccination entry
Reports
  reminder / recall
  check reminder status
  check reminder list
  manage custom letters

Home Page

The home page is displayed when first logging into IRIS and can be quickly accessed from any page by clicking **home** in the menu bar across the top of the page. The home page is divided into the following sections:

- **Announcements**: Contains important information regarding enhancements and maintenance for IRIS.
- **Release Notes**: Contains information regarding new releases of IRIS.
- **IRIS Inventory**: Consists of four tables as listed below:
    o Vaccine Order/Transfer Notification: Lists orders/transfers that have been shipped, are waiting return shipment, or have been shipped.

- o Active Inventory that is Going to Expire or Expired Lots with a Quantity: Lists vaccines that are going to expire as well as lots which have expired and still have a quantity.
- o Inventory that is Running Low by Vaccine Group: Lists inventory that is nearly depleted, sorted by vaccine group.
- o Inventory that is Running Low by Trade Name: Lists inventory that is nearly depleted, sorted by trade name.

Editing My User Account

IRIS allows all users to manage their own user account information. To verify or edit user account information:
1. Click the **manage access/account** button in the menu bar.
2. Click **Edit My User Account** under 'Manage My Account' in the menu panel.
3. On the Edit User page, change any necessary information including: user first name, user last name, street address, email address, and phone number. An email address is required when using the Forgot Password button in IRIS.
4. Click **Save**. If changes were made, the message "**User Updated**" appears at the top of the page.

Training Region	Edit User		** User Updated **
Welcome Joseph Zehner Logout	* User First Name: Joseph		Save
	* User Last Name: Zehner		Cancel
	User Middle Initial:		
Applications IRIS IMC	Street Address: 321 E 12th St.		
	Other Address:		
Manage My Account Change My Password My Training Status Edit My User Account Security Questions	P.O. Box:		
	City: DES MOINES		
	State: IA Zip: 50321 -		
	Email: joseph.zehner@idph.iowa.gov		
	Phone Number: 800 374 - 3958 Ext 3		

Resetting My Password

1) To reset a user's password, click the '**Forgot Password?**' button on the IRIS login page. This functionality will not work for Inactive accounts, and Inactive users must contact their IRIS Admin user.

2)   Enter the Org Code, Username, and Email Address associated with the account. Click the '**Submit**' button:

3)   The message, 'A password reset link has been sent to the email address associated with this account' displays:

4)   Check the email address associated with the account. There will be an email containing a link to reset the password. The link will be available for 24 hours. To reset the password, click the link in the email or copy and paste the link into the web browser:

Joey Zehner,

A request has been submitted to change your password in IRIS. Please follow the link below to reset your password. This link will be available for 24 hours.

https://iris.iowa.gov/IRISTRNJ/securityChallenge.do?token=c3f1596be0ca614e27d4c877dde1f5d3e969168c64d6a2a6ae09a20ac3aa474c

If you did not initiate this request, please contact the IRIS Help Desk.

IRIS Help Desk | Bureau of Immunization and TB | ADPER & EH | Iowa Department of Public Health 321 E. 12th St. | Des Moines, IA 50319 | Toll Free 800.374.3958

5) The link will re-direct to the IRIS page where one of the user's security questions will be displayed. Users have three attempts to correctly answer security questions. IRIS accounts will be locked after the third unsuccessful attempt, and users must contact their administrative user to unlock the account.

After successfully answering the security question(s), click the '**Submit**' button:

Please provide the answers to your security questions

What is your favorite Iowa State Fair food?

•••••

Submit

6) After correctly answering the security question(s), users can reset the password. Type the new password, then confirm the new password. After entering the new password, click the '**Save**' button:

Change Password

User	Joseph Zehner	Save
Username	zehnerj	Cancel
* New Password	••••••••	
* Confirm New Password	••••••••	

7) After clicking Save, users will be logged in and are able to access IRIS. Users must use the Logout tab at the top of the page to log out of IRIS, rather than closing the web browser.

IV. User Roles

There are multiple user roles in IRIS. Each user must complete an IRIS user agreement, either for Admin access or the Individual User Agreement (found under the Forms tab), and must comply with the IRIS Security and Confidentiality Policy (found in the Forms tab). Below are the most common user roles:

Administrative User

This user is a main point of contact for IRIS within the organization. The Administrative User is responsible for the maintenance of all organization-specific information including managing users, clinicians, physicians, and schools. The Administrative User is authorized to run data exchange jobs, utilize the inventory not deducted report, complete VFC re-enrollment if the organization participates in the Vaccines For Children Program, and access all features of the Standard User role described in the following section.

Standard User

This is the primary user of IRIS. The Standard User has the ability to add, edit, and find patients. In addition, the Standard User manages immunization information, can maintain the organization's inventory, place and accept VFC vaccine orders, and generates patient-specific and organizational-level reports such as reminder/recall reports, Ad Hoc reports, and immunization benchmark reports.

Patient Query-Only

This user has view-only access to view immunization information in IRIS and print reports.

School User

This user has view-only access to view immunization information in IRIS, print reports, and view/enter vision screening information, if requested.

V. Managing Inventory

Providers can add, maintain and track both public (VFC) and private inventory in IRIS. Vaccines For Children (VFC) program organizations do not need to manually add state-supplied vaccines to their inventory in IRIS. Instead, VFC shipments are accepted using the Manage Transfers link (see page 50).

 To manage a provider's inventory in IRIS:

1. Click the **manage inventory** link in the Inventory section of the menu panel.

2. The Manage Inventory page will display. The Manage Inventory page has five buttons to navigate the provider's inventory:

Manage Inventory	
Show Inventory for Sites....	Show Inventory
Show Transactions for Sites....	Show Transactions
Print Current Active Inventory....	Print Inventory
Update inventory Alerts....	Update Alert Prefs
Return to the Previous Screen....	Cancel

    A. **Show Inventory**: This displays the organization's inventory.

    B. **Show Transactions**: This displays the organization's inventory transactions. This can be used to show all transactions that occurred to the organization's inventory in IRIS, such as all patients who were immunized in a specific time period or by a specific lot number.

    C. **Print Inventory**: This option will print the organization's inventory. Inventory will display in a printable PDF. This is a great tool to use when doing a hand count of inventory in the provider organization's refrigerator to compare what is listed in IRIS. Click the browser's back arrow to go back to the previous screen once the PDF is open.

Current Active Inventory List

Run Report on: 05/03/2017
Organization: Iowa Training Org
VFC PIN: Z77000

Trade Name	Lot Number	VFC	Inv on Hand	Exp Date	Hand Count
ActHib	33K2ALOT	Yes	9	04/02/2019	
ActHib	1515AA	Yes	3	03/18/2013	
ActHib	UI743AAA	Yes	10	01/01/2020	
Boostrix	YHUI726	Yes	4	01/01/2019	
Boostrix	45THGS35	Yes	5	01/01/2019	

    D. **Update Alert Prefs**: This section will update the organization's Alert Preferences for inventory as shown on the inventory dashboard. Set the inventory expiration alerts (defaulted to 30 days), update the low-level alert defaults by either trade name or vaccine group (defaulted to alert at 5 doses), and select to update the low-level alerts by specific vaccine groups. Click Save when changes have been completed.

Inventory Expiration Alerts

The current system expiration default is 30 days.

Notify me when a lot will expire within | 25 | days.

Update Low-Level Alert Defaults

Selection grouping   ○ Vaccine Group ● Trade Name

The current system low level default is 5 doses.

The custom organization low level default is | 3 | doses.

Update Low-Level Alerts by Vaccine Group

(Click link to display all trade names for vaccine group.)	Doses
DTP/aP	
HepB	
Polio	
Smallpox	
Td/Tdap	

[Save] [Cancel] [Reset to Default]

3. Under the Inventory Alerts section, the Inventory Dashboard displays. The vaccine order/transfer notification will notify users when their VFC order or a transfer item is ready to be accepted into their inventory. The current pending inventory section will notify users when a patient is in a pending status, awaiting IRIS Help Desk staff to determine if a patient is a duplicate or unique patient. Once the patient is merged or unpended, the page will update with the result and show if inventory deducted or not.

Inventory Alerts

Vaccine Order/Transfer Notification ...

Type	Shipped	Awaiting Return Shipment	Rejected
Order(s)	2	0	0
Transfer(s)	2	2	2

Current Pending Inventory ...

Organization : [▼]

Trade Name : [All   ▼]   **Lot Number :** [All   ▼]

Date	Patient Name	Birth Date	Vaccine Group	Trade Name	Lot Number	VFC	Status	Deducted
05/03/2017	BRONSON DEAN	05/18/2007			666	Y	Merged	0
05/03/2017	BRONSON DEAN	05/18/2007			666	Y	Merged	0

Active Inventory that is Going to Expire ...

| Site Name	Trade Name	Lot Number	On Hand	VFC	Exp Date
IR Physicians	Fluad	123FLUAD	99	N	06/30/2017
IR Physicians	Flucelvax Quadrivalent	1FLUCLQUAD	19	Y	06/30/2017

Inventory that is Running Low by Vaccine Group ...

Vaccine Group	Quantity On Hand	VFC
HPV	8	N
Meningo	7	Y
Polio	4	Y

Inventory that is Running Low by Trade Name ...

| Trade Name	Quantity On Hand	VFC
No trade names have a low inventory.		

4. To display the organization's inventory, click the **Show Inventory** button.
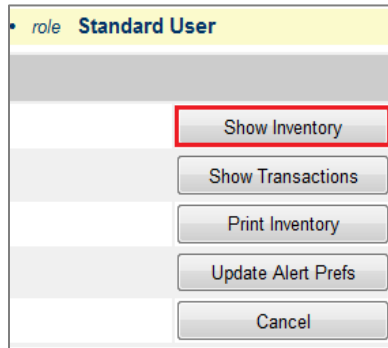
5. This area allows users to **Add Inventory**, **Modify Quantity**, **Show Transactions**, and **Cancel**.
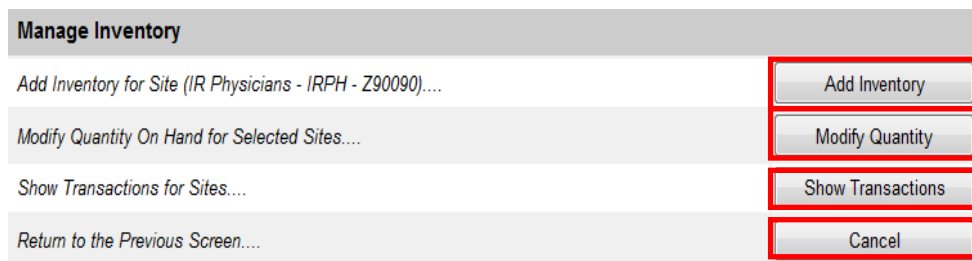
6. In the lower portion of this page, all of the inventory for the organization displays in a table with VFC inventory at the top and private inventory at the bottom. Filter this inventory by selecting the following options on the radio dial:
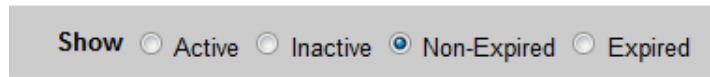
   a. **Active:** Displays all active inventory.
   b. **Inactive**: Displays all inactive inventory.
   c. **Non-Expired**: Displays inventory that is not expired.
   d. **Expired**: Displays inventory that has expired.

7. The inventory table is categorized by Trade Name, Lot Number, Inventory On Hand, Active, VFC, and Expiration Date. If the Inventory is red, the lot is inactive. If the inventory is pink, the inventory will expire soon.
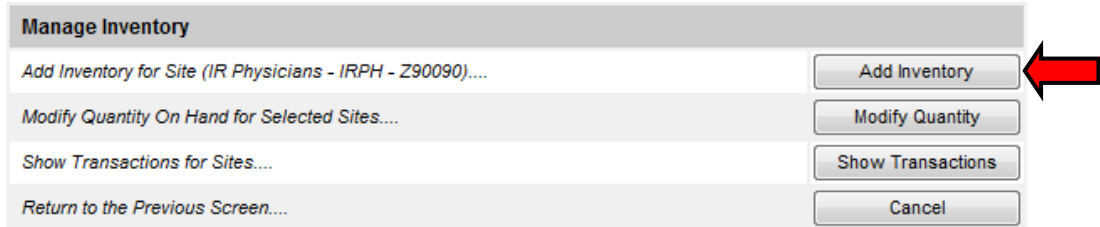
Select	Trade Name	Lot Number	Inv On Hand	Active	VFC	Exp Date
☐	ActHib	UI743AAA	10	Y	Y	01/01/2020
☐	ActHib	ABC123	0	N	Y	01/01/2020
☐	Adacel	BC356	5	Y	Y	06/02/2017

IRIS Training Handout

Add Inventory

Providers can add both VFC and private inventory into IRIS to track. VFC orders are accepted into an organization's inventory through the Manage Transfers link; VFC shipments should **not** be manually added to the organization's inventory. To add inventory to track in IRIS:
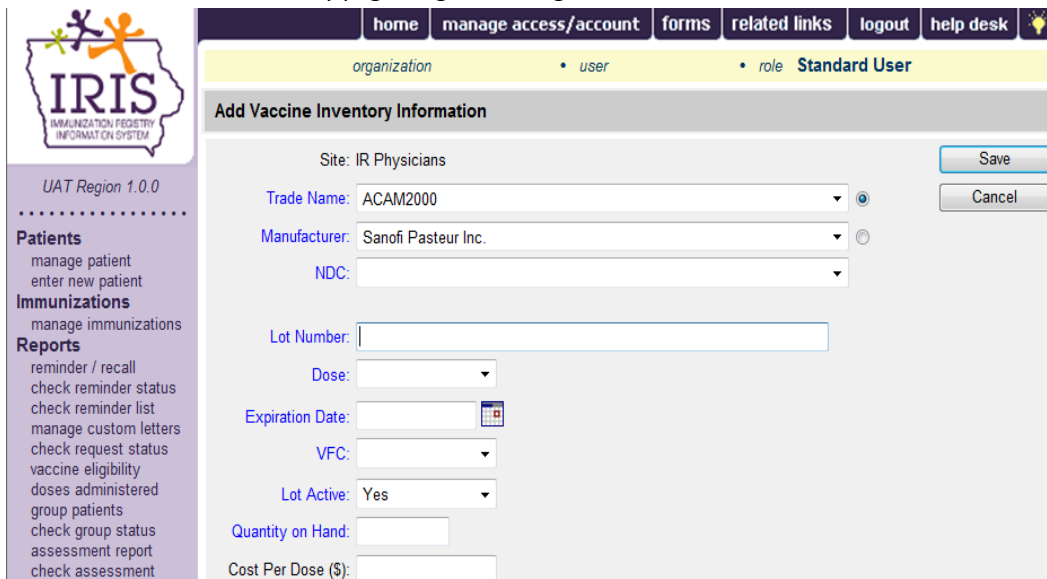
1. From the Manage Inventory page, click the **Add Inventory** button.

2. On the Add Vaccine Inventory page, begin entering the vaccine information.

   a. Select the **Trade Name** for the Vaccine from the dropdown menu.
   b. Select the **Manufacturer** information from the dropdown menu. The information can be filtered either by the Trade Name or by the Manufacturer by selecting the radio dial.
   c. Select the correct **NDC** number from the dropdown menu. Once the NDC is selected, a description of the inventory appears. If there is no NDC on file, a message asking to contact the IRIS Help Desk appears. The NDC numbers in the dropdown will be located on the box, not the vial/syringe.
   d. Enter the **Lot Number**.
   e. Enter the multitude of the **Dose** for the vaccine.
   f. Enter the vaccine's **Expiration Date**.
   g. Select if the vaccine is a **VFC** lot.
   h. In the **Lot Active** field, the default is Yes (it must be Yes to be saved initially).
   i. Enter the **Quantity on Hand.**
   j. Enter the **Cost Per Dose** if needed. This is not a required field.
   k. Once all of the information has been entered, click **Save**.

3. A message displays at the bottom of the screen stating "Inventory was inserted successfully". Above the message, there is now an option to "**Modify the Quantity on Hand**" for that specific vaccine.

   a. If the lot number needs modified:
      a) From the Action dropdown menu, select **Add** or **Subtract**.
      b) Enter the amount of the vaccine being modified.
      c) Select the most appropriate reason from the dropdown menu.
      d) Click **Save**.

4. To add more inventory, click the **Add New** button. When entering new inventory that is not already in IRIS, first click the **Add New** button as the information for the inventory previously added is editable and can be overwritten.

5. To return to the previous screen, select **Cancel**. To delete the inventory, click **Delete**. Lot numbers can only be deleted prior to any transactions occurring.

Edit Existing Lot Number

To edit an existing lot number in the organization's inventory:

1. From the Manage Inventory page, click the blue **Trade Name** link for the lot number to edit.

2. On the Edit Inventory information page, edit the appropriate fields. For example, to add inventory to an existing lot number, make sure the Lot Active field is set to Yes, and enter the amount of doses in the amount field. Click **Save**.

3. The message inventory updated successfully will appear.

Modify the Quantity

To modify the quantity of multiple vaccines:

1. Select the inventory to modify by selecting the **checkmark box** next to each vaccine.
2. Click the **Modify Quantity** button.

Manage Inventory		
Add Inventory for Site (Iowa Training Org - ITO - Z77000)....		Add Inventory
Modify Quantity On Hand for Selected Sites....		Modify Quantity
Show Transactions for Sites....		Show Transactions
Return to the Previous Screen....		Cancel

Site: Iowa Training Org ▾   **Show** ⦿ Active ◯ Inactive ◯ Non-Expired ◯ Expired

Select	Trade Name	Lot Number	Inv On Hand	Active	VFC	Exp Date
☑	ActHib	UI743AAA	19	Y	Y	01/01/2020
☐	Adacel	BC356	5	Y	Y	06/02/2017
☑	Boostrix	45THGS35	5	Y	Y	01/01/2019

3. On the **Modify Quantity on Hand for Selected Site(s)** page, the inventory item displays. To modify inventory:
   a. Select a proper action from the Action dropdown menu, either **Add** or **Subtract**.
   b. Enter the amount of inventory being modified.
   c. Select the appropriate reason for the modification from the Reason dropdown menu.
   d. Click **Save**, or click **Cancel** to return to the previous screen.

Manage Inventory		
Save Changes to Quantity On Hand for Selected Sites....		Save
Return to the Previous Screen....		Cancel

Modify Quantity On Hand for Selected Site(s)

Trade Name	Lot Number	Inv On Hand	Action	Amount	Reason
ActHib	UI743AAA	19	Subtract ▾	1	Broken vial/syringe ▾
Boostrix	45THGS35	5	Subtract ▾	5	Refrigerator too cold ▾
Boostrix	YHUI726	4	Add / Subtract	1	Pay back VFC vaccine with private vaccine ▾

4. The Show Inventory will display and will show the lot numbers and their adjusted doses on hand.

Show Transactions

Users can view all transactions in their organization's inventory within a specific date range, by transaction type, or by specific lot number. To view transactions:

IRIS Training Handout

1. On the Manage Inventory page, click the **Show Transactions** button.

2. Enter the desired date range in the Date Entered From and To fields, or the Date shot was given To and From fields. To further filter the information, select a specific transaction type or by a specific lot number.

3. The list of transactions meeting the criteria will display.

Trans Date	Lot \ Trade Name	VFC	Type	Qty	Patient Name	Vaccine Eligibilty	DOB
08/16/2016	FLU20 \ FluLaval Quadrivalent	Yes	REC	10			
11/16/2016	FLU20 \ FluLaval Quadrivalent	Yes	Immunize	-1	HOST, JAMIE	M	01/01/2011
11/16/2016	FLU20 \ FluLaval Quadrivalent	Yes	Immunize	-1	LOY, CARSON	M	01/01/2011
11/16/2016	FLU20 \ FluLaval Quadrivalent	Yes	Immunize	-1	PIENT, MERGE	M	01/01/2011
11/16/2016	FLU20 \ FluLaval Quadrivalent	Yes	Immunize	-1	VOLUNTEER, LUCKY	M	01/01/2011
11/16/2016	FLU20 \ FluLaval Quadrivalent	Yes	Immunize	-1	CPSI, JONNIE	N	01/01/2011
03/15/2017	FLU20 \ FluLaval Quadrivalent	Yes	Immunize	-1	TEST, PATIENT	M	01/01/2010
03/15/2017	FLU20 \ FluLaval Quadrivalent	Yes	Immunize	-1	APPLESEED, JOHNNY	M	01/01/2010
03/15/2017	FLU20 \ FluLaval Quadrivalent	Yes	Immunize	-1	SMITH, TOM	M	01/01/2010

Vaccine Transactions for Organization: Iowa Training Org - ITO - Z77000 — Record Count: 9

4. Below the list is the **Vaccine Transactions Totals** table, which shows the Transaction Codes, Transaction Description, Transaction Count and the Transaction Value, which is the amount of doses affected.

Vaccine Transactions Totals			
Trans Code	Trans Description	Trans Count	Trans Value
REC	New Shipment	1	0
Immunize	Immunizations Given	4	–4
Delete	Immunizations Deleted	2	2
TRA	Doses Transferred	0	0
3	Spoilage reported by provider	0	0
4	Expired	2	98
5	Lost or damaged in transit to Provider	1	–10
6	Failure to store properly upon receipt by Provider	1	–4
7	Refrigeration failure reported by Provider	1	–15
11	Lost or unaccounted for in Provider inventory	0	0
12	Other – Not Usable, reported by Provider	0	0
13	Vaccine Administration Equipment Failure	1	–5
14	Shortened Expiration Date	1	–2
15	Pay back VFC vaccine with private vaccine	0	0
16	Pay back private vaccine with VFC vaccine	0	0
RECALL	Doses Recalled	1	–2
ADMIN	Doses Administered	0	0
RET	Doses Returned	0	0
ERR	Error Correction	1	10
RECON	Doses Reconstituted	0	0
	Transaction Totals:	16	68

5.   Transactions or totals can be exported as a CSV (Comma Value Separated) file.

organization **Iowa Training Org** • *user* **Joseph Zehner** • *role* **IRIS Admin (Org)**

Cancel

Export Transactions as CSV   Export Totals as CSV

| Vaccine Transactions for Organization: Iowa Training Org - ITO - Z77000						Record Count: 200	
Trans Date	Lot \ Trade Name		VFC	Type	Qty	Patient Name	Vaccine Eligibilty	DOB

VI. Patients

Manage Patients

Before creating a new patient in IRIS, search for the patient to see if they already exist in IRIS. When searching for a patient, use the first two letters of either the patient's first or last name, along with the exact date of birth.

To search for a patient in IRIS:

1.   Click **manage patient** under the 'Patients' section in the menu panel.
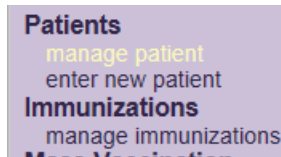
2.   Enter the search criteria and click the **Find** button. If multiple matches are detected, review the patient data and click the **Last Name** link for the correct patient.

Patient Search Criteria

Search by Patient

Minimum search criteria includes exact birth date and one additional field.

Last Name: Ze ✕   Mother's First Name: [   ]   [Find]

First Name: [   ]   Phone: [ ] - [ ] - [   ]   [Clear]

Middle Name: [   ]

* Birth Date: 01/01/2010

Search by Patient ID

* Patient ID: [   ]

Search by IRIS ID

* IRIS ID: [   ]

Possible Matches: 9

Last Name	First Name	Middle Name	Birth Date	Primary Patient Identifier	Mother's First	Gender	Status
ZEHENR	JOEY		01/01/2010	E456		M	A
ZEHNER	ED		01/01/2010			M	A

Note for Entering Names

On all first and last names entered for patient searches, IRIS disregards spaces, apostrophes, and hyphens entered. Do not use one letter for the search fields unless it is their true name as one character searches return only exact matches. When unsure of the spelling of the patient's name, use the wildcard search of a % sign in the first or last name fields.

3. The **Patient Demographic screen** will now be displayed if there was an immediate match from the initial search (step 1 above) or the last name link was clicked from the multiple match results.

4. When a list of patients is displayed for the search results, the patient's status for the provider organization will be listed in the far right column. The values are:
   a. A=Active for the provider organization
   b. I=Inactive for the provider organization
   c. M=Moved or gone elsewhere
   d. O=Other
   e. N=No relationship with the provider organization

Last Name	First Name	Middle Name	Birth Date	Primary Patient Identifier	Mother's First	Gender	Status
TEST	PATIENT		01/01/2010		JANE	F	A
TEST	PEDIATRIC		01/01/2010		VALENTIN	F	I
TEST	ADOLESCENT		01/01/2010			F	M
TEST	ADULT		01/01/2010		JANE	M	O
TEST	TEST	S	01/01/2010			M	N

VII.   Patient Demographic Screen Overview

The patient demographics page allows users to review the patient demographic information, and add, change, or update the personal data of the patient.

The following sections are displayed on the Patient Demographic Screen:

- Personal Information
- Patient AKA (Also Known As)
- Organizational Information
- Patient Information
- Address Information
- Responsible Persons
- Patient Comments
- Patient Notes

The last organization to update the patient record will display above the Patient AKA section.

Update Patient

Personal Information

* Last Name	TEST	* Gender	Male	Save
* First Name	PATIENT	SSN	(On File)	History/Recommend
Middle Name		Medicaid ID		Reports
Suffix		Birth Order	(for multiple births)	Cancel
* Birth Date	01/01/2010	Birth Country	UNITED STATES	
* Mother's Maiden Last	(On File)	Birth State	IOWA	
* Mother's First Name	JANE	Birth County	O'Brien	
		Patient Identifier		

Last Updated by Iowa Training Org on 05/04/2017

Patient AKA (0) ▼
Organization Information ▼
Patient Information ▼
Address Information ▼
Responsible Persons (0) ▼
Patient Comments (0) ▼
Patient Notes (0) ▼

1) **Personal Information** Section:

Personal Information			
* Last Name	TEST	* Gender	Male ▼
* First Name	PATIENT	SSN	(On File)
Middle Name		Medicaid ID	
Suffix	▼	Birth Order	(for multiple births)
* Birth Date	01/01/2010 📅	Birth Country	UNITED STATES ▼
* Mother's Maiden Last	(On File)	Birth State	IOWA ▼
* Mother's First Name	JANE	Birth County	O'Brien ▼
		Patient Identifier	

Buttons: Save, History/Recommend, Reports, Cancel

a. **Displays: Last Name**, **First Name**, (note the blue required/strongly encouraged fields with an asterisk) Middle Name, Suffix, **Birth Date**, **Mother's Maiden Last** and **First** name, **Gender**, Social Security Number, Medicaid ID, Birth Order, Birth Country, Birth State, Birth County, and Patient Identifier.

b. If changes are made to the patient demographic page, click **Save** to save the changes.

Buttons: Save, History/Recommend, Reports, Cancel
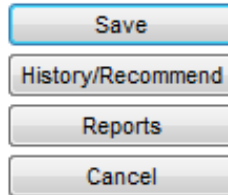
   i.   Clicking **Save** will save the patient data and stay on patient demographics screen.
   ii. Clicking **History/Recommend** will open the immunization history/recommend page for the current patient. This button does not save any changes made on the demographic page.
   iii. Clicking **Reports** will open to the patient's specific reports page. This button does not save any changes made on the demographic page.
   iv. Clicking **Cancel** will NOT save and will return to the previous screen.
        Note: Do not leave the page without saving or hit the back browser or the entries may be lost. Always remember to save before logging out.
c. Any changes to the patient's first name, last name or date of birth must be completed by the IRIS Help Desk. Please call 1-800-374-3958 for any name and/or birthdate changes. All other fields are editable to the provider organization. If the patient's date of birth field indicates it was provided by Vital Records, the responsible person must contact Vital Records at 515-242-6332 to correct and re-issue the birth certificate.

■■■■■■□□

Note: To open or close demographic sections, click the arrow to the right of the title; it will show an arrow down when it is closed and an arrow up when it is opened.

2) **Patient AKA**: This section indicates if the patient has had a previous name or has an additional name. This can help in the search process if a user searches for the patient under their previous name, the record will still display because of the AKA.

3) **Organization Information** is information directly related to the organization and affects certain reports. Users can update the patient's status for their organization, set the reminder/recall contact, assign them a health care provider or assign them a patient identifier for the provider organization in IRIS.

4) **Patient Information**. This section gives additional information about the patient. Edits can be made to **Race**, **Ethnicity** and **Language Spoken** (English or Spanish are the only options – this will affect the language of the reminder/recall letter that is sent). **School** is a dropdown that will be populated by the Organization's Administrative User and **Occupation** has a dropdown for occupations relevant to maintaining updated immunizations or events.

Patient Information ▲

[back to top]

Race (select all that apply)
- [ ] American Indian or Alaska Native
- [ ] Asian
- [x] Native Hawaiian or Other Pacific Islander
- [ ] Black or African-American
- [ ] White
- [x] Other Race

School [_____ ▼]
Occupation [_____ ▼]
Language Spoken [ENGLISH ▼]

Ethnicity [Not Hispanic or Latino ▼]

5) **Address Information:** Edit or add the patient's address information. Street address and zip is required for a reminder/recall letter to be generated. Additional information like the apartment number, phone number and email can be added as well.

Address Information ▲

[back to top]

view Patient Address History
Last Updated 04/05/2012

No Viable Address [ ]

Start Date [04/05/2012] 📅

Street Address [7109 DANBURRY COURT]   Phone Number [641] _ [767] _ [2382]

Other Address [_____]   Extension [____]

P.O. Box [_____]   E-Mail [_____]

* Zip [50831] +4 [____]

City [ARISPE]   State [IA ▼]

County [Union ▼]

6) **Responsible Persons**. This section allows users to identify, edit or add Parent/Guardian information or emergency contact information for the patient. The Responsible Person can be sent the Reminder/Recall letters if the information is entered. Additional information such as the apartment number, phone number, cell phone number, and email can be added as well.

Responsible Persons (2) ▲

[back to top]

Responsible Person listing   [Add New]

Review	Remove	Name	* Relationship	Primary
⦿	☐	**TEST, DAD** *IA*	Father	○
○	☐	**TEST, MOM** *IA*	Mother	⦿

Details for Responsible Person: DAD TEST
Click 'Apply Changes' after applying updates
Last Updated 05/05/2017

* Last Name	TEST	Street Address		[Apply Changes]
* First Name	DAD	Other Address		
Middle Name		P.O. Box		
* Relationship	Father ▾	City		
Phone Number	___-___-___	State	IA ▾	
Extension		Zip	___ +4 ___	
Cell Phone	___-___-___			
E-Mail				

7) **Patient Comments**. This section retains immunization-related comments. These comments may affect the immunizations recommended for the patient in IRIS.

Patient Comments (2) ▲

[back to top]

Patient Comment listing

Remove	Start Date	End Date	Patient Comment
☑			Allergy to egg ingestion (anaphylactic)
☐	01/06/2012		History of varicella (chicken pox)

Enter New Patient Comment

* Patient Comment [_____] ▾

Start Date [_____] 📅   End Date [_____] 📅   [Add Comment]

8) **Patient Notes**. This is a text field for any non-sensitive information that must be noted such as, "Patient moved when vaccine was administered".

Note: Patient Notes should not be used for sensitive or confidential medical information. Once entered and saved, a patient note cannot be deleted by a user. Contact the IRIS Help Desk at 800-374-3958 if further assistance is needed.
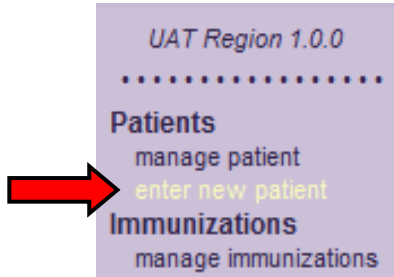
9) After entering all of the Patient information, click **Save**.

VIII. Enter a New Patient

If users are unable to find a patient after searching, create a new patient:

1) Click the **enter new patient** link under the 'Patients' section in the menu panel.

2) The **Personal Information** section will display:

Add Patient

Personal Information

a. When entering a new patient, the patient's first name, last name, birth date, and zip code are required fields.

b. The gender, mother's first name and mother's maiden name are not required fields but strongly recommended as they aid in avoiding patient duplication. If these are not known, leave them blank.

c. Other fields such as middle name, birth state, and birth county are optional to complete.

Personal Information

3) Once information is entered, click **Save**.

a. Enter either a patient's information throughout all the sections, and then click **Save,** or periodically select **Save** as information is entered.

    i. **Save:** will save the patient data and stay in patient demographic screen.

      ii. **History/Recommend:** will open the immunization history/recommend page for the current patient. This button does not save any changes made on the demographic page.

      iii. **Reports:** will open to the patient-specific reports page. This button does not save any changes made on the demographic page.

      iv. **Cancel:** will NOT save and will return users to the previous screen.

4) **Patient AKA**: If the patient has had a previous name or uses an additional name, enter this in the AKA field. To add an AKA:

   a. Enter the patient's AKA first name.

   b. Enter the patient's AKA last name.

   c. Click '**Add AKA**'. The screen will refresh and the name will display in the AKA section.

   d. Click '**Save**'. The screen will refresh and the message 'Patient record successfully saved' will appear in red confirming the record has been saved.

      i. To remove a patient AKA in IRIS, call the IRIS Help Desk at 1-800-374-3958.

5) **Organization Information** is information directly related to the organization and affects certain reports. This is also where the patient identifier for the organization can be input or changed.

   a. **Active field**: This section will default to "Active" which means the patient will be receiving services from the organization. If Inactive status is selected, this patient becomes inactive for this organization only.

   b. **Provider-(PCP)**. From the dropdown, choose the primary care provider within the organization. This list is managed by the organization's administrative user.

    c.   **Tracking Schedule**. The tracking schedule field is required and defaults to the ACIP (Advisory Committee on Immunization Practices) schedule.

    d.   **Allow Reminder and Recall Contact:** Choose if the patient should be sent a reminder/recall report of immunizations due or overdue. This defaults to yes but if the parent or patient does not want a notice sent, choose no from the dropdown box.

    e.   **Last Notice:** lists the date the last notice for the Reminder and Recall letter was generated. It will be blank until a reminder/recall letter is sent for the patient.

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Note: When generating reminder or recall letters, the patient's status must be "Active", the "Reminder/Recall Contact" field must be "Yes", and there must be sufficient address information on the patient's record.

■■■■▪▫

    f.   A patient identifier can be added for the organization to search and find a patient easily in IRIS. To add a patient identifier:

Patient Identifiers		
Remove Identifier	**Patient Identifier**	**Primary**
☐	123ABC	⦿
Add Patient Identifier		
Patient Identifier	456DEF	Add Patient Identifier

        i.   Enter a patient identifier in the patient identifier field. A patient identifier can be any combination of letters and numbers.

       ii.   Click the **Add Patient Identifier** button; it will populate in the Patient Identifier list. If there is more than one Identifier for the organization, select the radio button next to identifier the organization would like to use as the primary one.

     iii.   Click '**Save'**. The screen will refresh, and the message 'Patient record successfully saved' will appear in red confirming the record has been saved.

To Remove an Identifier:

Patient Identifiers		
Remove Identifier	**Patient Identifier**	**Primary**
☑	123ABC	⦿
Add Patient Identifier		
Patient Identifier		Add Patient Identifier

        i.   Select the check mark box next to the identifier to remove and click the **Remove Identifier** button.

       ii.   Click '**Save'**. The screen will refresh and the message 'Patient record successfully saved' will appear in red confirming the record has been saved.

6) **Patient Information**. This section gives additional information about the patient.

a. In the Patient Information section, select the appropriate **Races**, **Ethnicity** and **Language Spoken** (English or Spanish are the only options – this will affect the language of the reminder/recall letter that is sent). **School** and **Occupation** are dropdown fields that are managed by the organization's Administrative User and will be useful for reports.

b. After selecting the appropriate checkmark boxes, click 'Save'.

c. Click '**Save**'. The screen will refresh, and the message 'Patient record successfully saved' will appear in red confirming the record has been saved.

7) The **Address Information** displays the patient's address information, phone number and email address. To add, edit or update a patient's address information:

a. The **View Patient Address History** link displays the patient's previous addresses.

b. The **No Viable Address** checkbox should be checked if reminder letters have been returned as not deliverable.

c. The **Start Date** field will automatically populate to the current date when entering a new address and will not let allow a user to enter a previous date.

d. Enter a street address or P.O. Box number for the patient.

e. Enter a zip code. The zip code is a required field. The patient's zip code will populate with the city, state, and county for Iowa zip codes.

f. Enter a phone number for the patient in the phone number field.

g. Enter a cell phone number for the patient if available.

h. Enter an email address for the patient if available.
i. Click '**Save'**. The screen will refresh, and the message 'Patient record successfully saved' will appear in red confirming the record has been saved.

8) **Responsible Persons**. This section identifies patient emergency contact information. To enter a new responsible person:

a. Enter the responsible person's **Last Name**, **First Name**, and **Relationship**. These fields are required when entering a responsible person.
b. Enter other demographics if available, such as phone number, cell phone number, email, and street address. When entering the responsible person's zip code, the city and state will populate automatically.
c. Click '**Apply Changes'**. The screen will refresh, and the Responsible Person will be listed under the Responsible Person Listing section.
d. If multiple responsible persons are on the patient record, select who the Primary is by clicking the radio button under the Primary section. The Primary Responsible Person will print on patient specific reports, such as the Certificate of Immunization.
e. Click '**Save'**. The screen will refresh and the message 'Patient record successfully saved' will appear in red confirming the record has been saved.

To Add a new Responsible Person:

a. Click the 'Add New' button.
b. The screen will refresh, and the responsible person demographic section will be blank.

    c.   Enter the responsible person's **Last Name**, **First Name**, and **Relationship**. These fields are required when entering a responsible person.

    d.   Enter other demographics if available, such as phone number, cell phone number, email, and street address. When entering the responsible person's zip code, the city and state will populate automatically.

    e.   Click '**Apply Changes**'. The screen will refresh, and the Responsible Person will be listed under the Responsible Person Listing section.

    f.   If multiple responsible persons are on the patient record, select who the Primary is by clicking the radio button under the Primary section. The Primary Responsible Person will print on patient specific reports, such as the Certificate of Immunization.

    g.   Click '**Save**'. The screen will refresh, and the message 'Patient record successfully saved' will appear in red confirming the record has been saved. The responsible person will now be saved to the patient record

To Edit a Responsible Person:

    a.   Select the radio button next to the responsible person to edit.

    b.   Click the 'Review' button.

    c.   Update, add, or edit existing fields for the responsible person.

    d.   Click '**Apply Changes**'. The screen should refresh, and the Responsible Person should be listed under the Responsible Person Listing section.

    e.   Click '**Save**'. The screen will refresh, and the message Patient record successfully saved' will appear in red confirming the record has been saved. The responsible person should now be saved to the patient record.

To Remove a Responsible Person:

    a.   Select the checkmark box next to the responsible person to remove.

    b.   Click the 'Remove' button.

    c.   Click '**Save**'. The screen will refresh, and the message Patient record successfully saved' will appear in red confirming the record has been saved. The responsible person will now be removed from the patient record.

9) **Patient Comments**. This section allows users to enter immunization-related comments. These comments may affect the immunizations recommended on the tracking schedule. To add a patient comment:

a. Enter a new comment by choosing the appropriate comment from the Patient Comment dropdown list.

b. Enter a **Start Date** of the comment if applicable. Although it is not required, a Start Date is important as the comment can then be evaluated against the tracking schedule.

c. Click **Add Comment** to update this section.

d. Click '**Save**'. The screen will refresh, and the message 'Patient record successfully saved' will appear in red confirming the record has been saved

Patient comments can also be removed. To remove existing comments:

a. Select the checkmark box under the remove field next to the comment to delete.

b. Click the Remove button.

c. Click '**Save**'. The screen will refresh, and the message 'Patient record successfully saved' will appear in red confirming the record has been saved. The patient comment will now be removed from the patient record.

10) **Patient Notes**. This is a text field for any non-sensitive information that must be noted such as, "Child has excessive fear of needles". To add a patient note:

Patient Notes (1) ▲

[back to top]

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

Created by	Create Date	Note
Zehner, Joseph	05/05/2017 03:17 PM	Patient moved when vaccine was administered.

    a.   Type the note in the free text field.

    b.   Click '**Save**'. The screen will refresh, and the message 'Patient record successfully saved' will appear in red confirming the comment has been saved.

■■■■■■

Note: Patient Notes should not be used for sensitive or confidential medical information. Once entered and saved, a patient note cannot be deleted by a user. Contact the IRIS Help Desk at 1-800-374-3958 if further assistance is needed.

■■■■■■

11) After entering all of the Patient information, click the **Save** button. A message will display at the top of the page confirming the patient was saved successfully.

Patient record successfully added

Update Patient

12) If "Patient Match Detected" message displays when adding a patient, IRIS will list the patient matched. By clicking the last name link, review the existing patient's demographic information to determine if the existing patient is the same as the patient being added. If the new patient is not the same as the patient match detected, call the IRIS Help Desk for further assistance at 1-800-374-3958 to create the new record.

Patient Match Detected

Based on the information you entered, the system has determined the patient may already exist in IRIS. Please review the demographic information for the patient(s) below and if it does not appear to be your patient, please contact the IRIS Help Desk at 1-800-374-3958 for further assistance.

Possible Patient Matches: 1

Last Name	First Name	Birth Date	Primary Patient ID	Mother's First Name	Gender	Status
TEST	PATIENT	01/01/2010		JANE	M	O

IX. Immunizations

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

1. Click **Manage Patient** under the Patients section of the menu panel. This will display the Patient Search page. Once the patient is found, click the **History/Recommend button** from the patient demographic page to display the patient's immunization record page.

2. Click **Manage Immunizations** under the Immunizations section of the menu panel. This will display the Patient Search page. Once the patient is found, their immunization record page displays.

The Immunization Records page contains a large amount of information on each patient in IRIS. This page has different sections, including Patient Information, Immunization Record, and Vaccines Recommended by Selected Tracking Schedule:

Patient Information Section: In this section, the patient's information such as Name, DOB, Gender, Tracking schedule, Patient ID, patient's address, and any comments will display. If there is more than one comment, scroll through the comments.

Patient Information				
Patient Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Patient ID
BUGS BUSTER BUNNY	03/01/2011	M	ACIP	2323
Address/Phone	2343, CARROT PATCH, DES MOINES, IA 50321 (324) 545-4653			
Comments	{1 of 2} .. 03/29/2011 ~ Immunity: hepatitis B			

Below the patient information section, the patient's age and patient notes display by clicking on the patient notes link. The following navigation buttons also appear:

Current Age: 1 year, 1 month, 4 days
Patient Notes (2)   *view or update notes*
Add New Imms   Add Historical Imms   Edit Patient   Reports   Print Record   Print Confidential Record

   a. **Add New Imms:** This button will add new immunization to the patient's record from IRIS inventory or non-IRIS inventory.
   b. **Add Historical Imms:** This button will add historical immunization to the patient's record.
   c. **Edit Patient:** This button will return to the patient demographic page.
   d. **Reports:** This button will link to the patient reports page, which contains many patient-specific reports.
   e. **Print Record:** This button will display a printable record of the patient's History Recommend Page. To print this file, click the "**File**" tab on the browser and select the **Print** option.
   f. **Print Confidential**: This button displays the same patient immunization record with minimal patient identification. To print this file, click the "**File**" tab on the browser and select the **Print** option.

Patient Immunization Record: Below the patient information is the patient's immunization record. This section displays:

Immunization Record								
Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Edit
DTP/aP	04/12/2011	1 of 5	DTaP,5 pertussis antigens [DAPTACEL ®]	Full				✎
	05/10/2011	2 of 5	DTaP,5 pertussis antigens [DAPTACEL ®]	Full				✎
	09/01/2011	3 of 5	DTaP,5 pertussis antigens [DAPTACEL ®]		No		Yes	✎
HepA	03/01/2012	1 of 2	HepA, NOS [HepA, NOS ®]	Full		Yes		✎
HepB	03/01/2012	1 of 3	HepB, NOS [HepB ®]	Full				✎
Influenza-seasnl	03/01/2012	1 of 2	Influenza, NOS				Yes	✎
MMR	03/01/2012	1 of 2	MMR [MMR II ®]	Full				✎
PneumoConjugate	03/01/2012	1 of 2	PCV7 [Prevnar7 ®]				Yes	✎
Polio	04/12/2011	1 of 4	Polio-Inject [IPOL ®]	Full				✎
	05/10/2011	2 of 4	Polio-Inject [IPOL ®]	Full				✎
	06/01/2011	NOT VALID	Polio-Inject [IPOL ®]	Full				✎

a. **Vaccine Group**: All of the vaccines a patient has received are listed alphabetically by vaccine group, then ordered by date administered.

b. **Date Admin**: This is the date the vaccine was administered. Clicking on the blue date link will display a popup window with the tracking schedule for that immunization as well as highlight the dose in a vaccine series.

c. **Series**: The number in the series of vaccines for the patient.
   i. When **NOT VALID** appears in the Series columns, the dose was not valid for this patient. Click the date link to display a popup window with an explanation of status for why that immunization is considered not valid.

d. **Vaccine [Trade Name]**: This displays the vaccine name and trade name, if available.

e. **Dose**: The dose size of the vaccine (full, half, or multiple).

f. **Owned**: If the section under Owned is blank, this indicates the organization owns the vaccine, meaning this organization entered the information for a particular vaccine. If 'No' is in the owned field, another organization has entered the information for the immunization. Clicking on the **No** link will show contact information for the organization that entered the immunization.

g. **Reaction**: Indicates the patient had a recorded reaction to the immunization. If there was a reaction, Yes will display in the field. Clicking the Yes link will display the reaction the patient had.

h. **Hist?**: This section indicates whether or not an immunization is historical. Yes in this field indicates the immunization was historical. An historical immunization is an immunization that was not administered by this organization and was not previously record in IRIS.

i. **Edit**: Edit immunizations owned by this organization as well as historical immunizations.

Vaccines Recommended by Selected Tracking Schedule: This section shows dates recommended for vaccinations by tracking schedule. This section displays:

Select	Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
☐	DTP/aP	DTaP, NOS	03/01/2012	**03/01/2012**	10/01/2012
☐	HepA	HepA, NOS	09/01/2012	09/01/2012	04/01/2013
	HepB	HepB, NOS		**Immunity Recorded for Vaccine Group**	
☐	Hib	Hib, NOS	03/01/2012	03/01/2012	**03/01/2012**
☐	Influenza-seasnl	Influenza, NOS	03/29/2012	**03/29/2012**	04/26/2012
☐	MMR	MMR	03/29/2012	03/01/2015	03/01/2016
☐	PneumoConjugate	PCV13	04/26/2012	05/01/2012	07/01/2012
☐	Polio	Polio, NOS	06/29/2011	**09/01/2011**	10/01/2012
	Varicella	Varicella		**Contraindicated**	

Vaccines Recommended by Selected Tracking Schedule

Add Selected

a. **Add Selected:** select the appropriate boxes under the "add selected" to add multiple recommended immunizations at once.

b. **Vaccine Group:** The vaccines in the tracking schedule are listed by vaccine group**.** Clicking the link will display the tracking schedule for that specific vaccination.

c. **Vaccine:** The vaccine name is listed.

d. **Earliest Date:** This is the earliest date the vaccine can be administered according to the ACIP tracking schedule.

e. **Recommended Date:** This is the recommended date the vaccine can be administered according to the ACIP tracking schedule.

f. **Past Due Date:** This is the past due date for the immunization according to the ACIP tracking schedule.

g. The chart can have different colors depending on the schedule. Green indicates when the date for a recommended immunization is due or is past due. Gray indicates the series is complete, or other notes such as the maximum age exceeded or a contraindication.

Entering Immunizations

There are three ways an immunization can be recorded, either via the Add New Imms button, the Add Selected button, or Add Historical Imms button. When adding immunizations by the Add New Imms button or the Add Selected button, select whether or not the immunization is coming from this organization's inventory.

1. To add new immunizations via the **Add New Imms** button:
   a. Click the **Add New Imms** button to display the Add New Immunizations page.

Current age: 1 year, 1 month, 4 days
Patient notes (2) *view or update notes*

Add New Imms   Add Historical Imms   Edit Patient   Reports   Print Record   Print Confidential Record

   b. The patient information, patient notes, and patient's immunization record to date will display. Scroll down to the Enter New Immunization section and proceed to enter the following immunization information:

c.   To add immunizations from IRIS Inventory, make sure the check box **From IRIS Inventory** is selected. This will deduct the immunization from this organization's vaccine inventory. Unselect the checkmark box if immunizations will not be deducted from inventory.

d.   **Date Administered:** Select the date the vaccine was administrated by using the MM/DD/YYYY format, or use the calendar by clicking the calendar icon [icon].

e.   **Administered By:** Select who administered the vaccine from the dropdown list.

f.   **Remove box:** When this is unselected, the immunization will be added to the patient record. It defaults to unselect when the immunization field is populated.

g.   **Immunization**: This lists all vaccine groups the provider organization

h.   n has in their inventory. If none are listed, this indicates the provider organization has not set up inventory in IRIS. Unselect the From IRIS Inventory box, and all immunizations will be listed with the dose not coming from inventory.

i.   **Trade Name-Lot#. Exp Date:** If using vaccine from Inventory, the trade names and lot numbers from the provider organization's inventory will be listed depending on what was selected from the immunization field.

j.   **Vaccine Eligibility**: Select the appropriate Vaccine for Children vaccine eligibility for the patient's immunization.

k.   **Administered B**y: If selected above, this field will pre-populate to that selection. To change, click the dropdown list and choose the correct name from the list.

l.   **Body Site**: Select the body site where the immunization was administered.

m.   **Route**: Select the route for how the immunization was administered.

n.   **Dose**: Select the appropriate dose for the immunization. The dose will default to Full.

o.   Repeat these steps for each new immunization.

p.   **New Patient Comments:** If necessary, select the appropriate comment from the drop-down list. Add an "Applies-To Date" by using the MM/DD/YYYY format, or use the calendar by clicking the calendar icon [icon]. Click the **Add** button to add patient comment to the record.

q.   **VIS Dates for New Immunizations**: This section shows all of the vaccines associated with the combination vaccine.

r.   Click the **Save** button to save.

s.   The immunization will be recorded and displayed on the patient's immunization record.

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Edit
DTP/aP	04/06/2012	4 of 5	DTaP-IPV/Hib [Pentacel ®]	Full				✏

2. The second way to add new immunizations is by using the **Add Selected** button. At the bottom of the patient's History/Recommends page is the Vaccines Recommended by Selected Tracking Schedule. View the recommended vaccines to administer per the tracking schedule, and select each vaccine group as appropriate. IRIS allows users to enter combination vaccines, by selecting one vaccine component of the combination vaccine. To add immunizations via the Add Selected method:

   a. Click the boxes of the appropriate immunizations under the Vaccines Recommended section, and click the **Add Selected** button:

Vaccines Recommended by Selected Tracking Schedule

Select	Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
☑	DTP/aP	DTaP, NOS	03/01/2012	**03/01/2012**	10/01/2012
☐	HepA	HepA, NOS	09/01/2012	09/01/2012	04/01/2013
	HepB	HepB, NOS		Immunity Recorded for Vaccine Group	
☐	Hib	Hib, NOS	03/01/2012	03/01/2012	**03/01/2012**
☐	Influenza-seasnl	Influenza, NOS	03/29/2012	**03/29/2012**	04/26/2012
☐	MMR	MMR	03/29/2012	03/01/2015	03/01/2016
☐	PneumoConjugate	PCV13	04/26/2012	05/01/2012	07/01/2012
☐	Polio	Polio, NOS	06/29/2011	**09/01/2011**	10/01/2012
	Varicella	Varicella		Contraindicated	

Add Selected

   b. The patient information displays, along with patient notes, and patient's immunization record to date. Scroll down to the Enter New Immunization section and proceed to enter the following immunization information:

Enter New Immunization

From IRIS Inventory ☑   Date Administered 04/06/2012   Activate Expired

Administered By Doe, John

Remove	Immunization	* Trade Name-Lot #. Exp Date	* Vaccine Eligibility	Administered By
☐	DTP/aP	Pentacel-fdd10015 6.3.1.3-01/01	N - No Insurance	John Doe
	Body Site LEFT THIGH	Route INTRAMUSCULAR	Dose Full	Quantity on Hand: 24 VFC

Save   Cancel

New Patient Comments

Select	Date	Patient Comment	
			Delete

Enter New Patient Comment

* Patient Comment

Applies-To Date

Add

   c. To add immunizations from IRIS Inventory, click the check box **From IRIS Inventory**. This will deduct the immunization from this organization's vaccine inventory. Or leave the checkbox unselected if not tracking inventory in IRIS.

   d. **Date Administered:** Select the date the vaccine was administrated by using the MM/DD/YYYY format, or use the calendar by clicking the calendar icon 📅.

   e. **Administered By:** Select who administered the vaccine from the dropdown list.

f. **Remove box:** When this is unselected, the immunization will be added to the patient record. It defaults to unselect when the immunization is selected.

g. **Immunization**: This will list all vaccines which were selected from the Add Selected fields.

h. **Trade Name-Lot#. Exp Date:** If using vaccine from Inventory, the trade names and lot numbers from the provider organization's inventory will populate depending on what was selected from the immunization field.

i. **Vaccine Eligibility**: Select the appropriate Vaccines for Children (VFC) vaccine eligibility for the patient's immunization.

j. **Administered B**y: If selected above, this field will pre-populate to that selection. To change, click the dropdown list.

k. **Body Site**: Select the appropriate body site for the immunization.

l. **Route**: Select the appropriate route for the immunization.

m. **Dose**: Select the appropriate dose for the immunization. The dose will default to Full.

n. Repeat these steps for each new immunization.

o. **New Patient Comments:** If necessary, select the appropriate comment from the drop-down list. Add an "Applies-To Date" by using the MM/DD/YYYY format, or use the calendar by clicking the calendar icon 🗓. Click the **Add** button to add patient comment to the record.

p. **VIS Dates for New Immunizations**: This section will show all of the vaccines associated with the combination vaccine being administered.

q. Click the **Save** button to save.

r. The immunization will be recorded and displayed on the patient's immunization record.

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Edit
DTP/aP	04/06/2012	4 of 5	DTaP-IPV/Hib [Pentacel ®]	Full				💉
Hib	04/06/2012	1 of 2	DTaP-IPV/Hib [Pentacel ®]	Full				💉
Polio	04/06/2012	3 of 4	DTaP-IPV/Hib [Pentacel ®]	Full				💉

3. The third way to record immunizations is for historical immunizations, which are immunizations administered by another organization and not recorded in IRIS. These immunizations will not be displayed as administered by this organization but will show this organization entered the data. An example of an historical immunization is a patient bringing a paper record from out of state. To enter historical immunizations, click the **Add Historical Imms** button:

Current Age: 1 year, 1 month, ays

Patient Notes (2)   *view or date notes*

| Add New Imms | Add Historical Imms | Edit Patient | Reports | Print Record | Print Confidential Record |

a. Scroll down to the Enter Historical Immunization area. Enter the date of the historical immunization. Click the empty cell under the Immunization and Dose, and enter the date when the vaccine was administered. Enter multiple immunizations and doses from a single screen. For combination vaccines, only one of the components is needed to enter date administered. Trade Name administered can be added after clicking the Add Details button.

Enter Historical Immunizations

Immunization	Dose 1	Dose 2	Dose 3	Dose 4	Dose 5
DTP/aP	01/02/2016	03/02/2016			
HepA					
HepB	11/02/2015	01/02/2016	03/01/2016		
Hib					
HPV					
Influenza-seasnl	11/02/2016				
Influenza-H1N1					
Meningo					
MMR	11/02/2016				

b. If the vaccine being recorded is not displayed, click the dropdown next to Select additional types of immunizations. Scroll through more vaccines to find the appropriate immunization.

[▼] *(Select additional types of immunizations.)*

c. The vaccine date is the only required field. If this is all the information available, click **Save** to add the vaccine(s). If the record contains a trade name or a lot number, click the **Add Details** button to add these details.

Varicella					
Zoster					

[▼] (Select additional types of immunizations.)   [Add Details] [Save] [Cancel]

d. On the Add Details screen, Trade Name, Lot Number, Provider Org, and Source of the Imm can be entered. When all details are added, click the **Save** button.

Enter Historical Immunization Details

Immunization	* Date Admin	Trade Name	Lot Number	Provider Org	Source of Imm
DTP/aP	04/06/2012	Pentacel ▼	57678768	Iowa Hospital	Source Unspecified ▼
Hib	04/06/2012	Pentacel ▼	57678768	Iowa Hospital	Source Unspecified ▼
Polio	04/06/2012	Pediarix ▼	57678768	Iowa Hospital	Source Unspecified ▼

(* required field)   [Save] [Cancel]

Note: If the Provider Org field is blank, the immunization will list the provider organization name as the Source field for the immunization on patient specific reports. The report will display the information typed in the Provider Org field instead if the field is populated.

e. Users will return to the patient's History/Recommend page and see the historical immunizations added on the patient's immunization record section. Notice the Owned section is blank, since this organization entered the information, and the historical section has Yes since the vaccines were added historically.
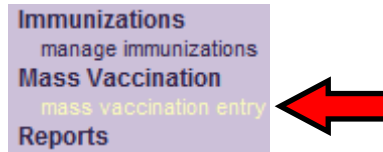
X. Mass Vaccination Entry

IRIS allows a user to enter immunizations for a large number of patients using the Mass Vaccination Entry module. An example would be for a school-based clinic or a flu clinic. To enter immunizations for a list of patients:

1. Click **Mass Vaccination Entry** link under the Mass Vaccination section on the menu panel.

2. On the Mass Vaccination List page, enter the name of a new list and click **Save,** or select a previous list by clicking the blue link. This will allow patients to be added to an existing list. Naming lists by vaccine eligibility is one strategy, such as 'Medicaid eligible'.

3. The mass vaccination screen will display. This page is a combination of the add new immunizations page and patient search page. The first half of the screen allows for entry of immunization information.

List Immunization Information ▲		

From IRIS Inventory ☑   * Date Administered 01/04/2017 📅   Activate Expired

Administered By [▼]

From IRIS Inventory

Remove	Immunization	* Trade Name-Lot #-Exp Date	* Vaccine Eligibility
☐	Influenza-seasnl ▼	Fluarix Pres-Free-UBV3456-01/01/2019-VFC ▼	M - Medicaid Enrolled ▼

Administered By [▼]   Body Site LEFT ARM ▼   Route INTRAMUSCULAR ▼   Dose Full ▼

Quantity On Hand: 37

[Add Immunization]

    a. The page will default to add immunizations from IRIS Inventory. If doses being entered are not from IRIS Inventory, deselect the 'From IRIS Inventory' box.

    b. Enter a date for the Date Administered field using the MM/DD/YYYY format, or use the calendar by clicking the calendar icon 📅.

    c. Select the person immunizing patients from the Administered By dropdown menu, or leave this field blank if not used.

    d. Select an immunization from the Immunization dropdown menu. If no inventory is listed, this indicates the organization has not set up inventory. Unselect the From IRIS Inventory box.

    e. Select the appropriate vaccine from the Trade Name – Lot # - Exp Date dropdown menu.

    f. Select the appropriate vaccine eligibility from the Vaccine Eligibility dropdown menu. If the lists are sorted by eligibility, be sure to match the eligibility in the List Name. In this example, Medicaid would be selected.

    g. Select a Body Site from the dropdown menu.

    h. Select a Route from the dropdown menu.

    i. To add another immunization, click the Add Immunization button. A maximum of five immunizations can be added.

4. To add additional immunizations, click the **Add Immunization** button. A maximum of five immunizations can be added.

5. Once all immunization information has been entered, search for patients to add to the Patient List. Enter the search criteria for the patient and select Find. If only one patient is found, the patient will be added to the Patient List. If multiple patients are found, select the blue name hyperlink to view demographic information for patients. Select the '+' button to add the patient to the list. All patients being added to the list should have the same VFC vaccine eligibility.

6. After adding the patient to the list, the search results will clear. Search for the next patient to add to the list. The list allows approximately 600 patients per list.
   a. If an incorrect patient is added to the list or needs removed from the list, click the checkmark box next to the patient and click the **Remove Selected** button.

7. Users can control whether a patient becomes active or inactive for their organization when immunizing the patient. If a patient has no previous relationship with the organization and is added to the Mass Vaccination list, the status will be listed as, 'Inactive-One Time Only' under the organization status dropdown menu. To make a patient Active after being immunized, select the 'Active' option from the dropdown menu. To make all patients a specific status, select the appropriate option under the Organization Status bar at the top of the page and click the Apply All button.
   a. If a patient has a previous relationship with the provider organization, that status will be listed under the Organization Status field and cannot be changed from the Mass Vaccination page.

Patient List(3) ▲							
Patient List							
Select All	Immunize Selected	Remove Selected	Clear List Status	Organization Status	Inactive - One Time Only ▾	Apply All	Page 1 of 1
A-Z	**Last Name**	**First Name**	**Middle Name**	**Birth Date**	**Immunization Status**	**Organization Status**	
☐	PATIENT	FLUZONE		01/01/2010		Inactive - One Time Only ▾	
☑	PATIENT	QUICK		01/01/2010		Active ▾	
☐	TEST	PATIENT		01/01/2010		Inactive-One Time Only	

8. To select patients to immunize, click the checkmark box next to their name. To immunize all of the patients on the list, select the **Select All** button, which will select all of the patients.

Patient List(3) ▲							
Patient List							
Select All	Immunize Selected	Remove Selected	Clear List Status	Organization Status	Inactive - One Time Only ▾	Apply All	Page 1 of 1
A-Z	**Last Name**	**First Name**	**Middle Name**	**Birth Date**	**Immunization Status**	**Organization Status**	
☑	PATIENT	FLUZONE		01/01/2010		Inactive - One Time Only ▾	
☑	PATIENT	QUICK		01/01/2010		Inactive - One Time Only ▾	
☑	TEST	PATIENT		01/01/2010		Inactive-One Time Only	

9. To immunize the patients selected, click the **Immunize Selected** button.

Patient List(3) ▲							
Patient List							
Select All	Immunize Selected	Remove Selected	Clear List Status	Organization Status	Inactive - One Time Only ▾	Apply All	Page 1 of 1
A-Z	**Last Name**	**First Name**	**Middle Name**	**Birth Date**	**Immunization Status**	**Organization Status**	
☑	PATIENT	FLUZONE		01/01/2010		Inactive - One Time Only ▾	
☑	PATIENT	QUICK		01/01/2010		Inactive - One Time Only ▾	
☑	TEST	PATIENT		01/01/2010		Inactive-One Time Only	

10. The screen will refresh, and the immunization status field should display the result, showing 'Immunized' for those patients who were selected. The organization status field will also display the organization status for the patient.

| Patient List(3) ▲							
Patient List							
Select All	Immunize Selected	Remove Selected	Clear List Status	Organization Status	Inactive - One Time Only ▾	Apply All	Page 1 of 1
A-Z	**Last Name**	**First Name**	**Middle Name**	**Birth Date**	**Immunization Status**	**Organization Status**	
☐	PATIENT	FLUZONE		01/01/2010	Immunized	Inactive-One Time Only	
☐	PATIENT	QUICK		01/01/2010	Immunized	Inactive-One Time Only	
☐	TEST	PATIENT		01/01/2010	Immunized	Inactive-One Time Only	

XI. Manage or Create Orders

VFC provider organizations will use IRIS to place their vaccine orders.

1) Click the **Manage Order** link under the "Inventory" section of the Menu Panel
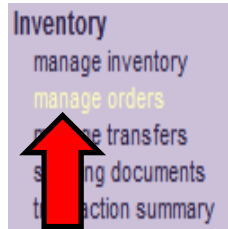
2) This will open the Orders List for the organization. Select the appropriate radio button to show Current, Historical or Both orders. Or select Flu or Flu Historical Orders to show flu vaccine orders. The historical section defaults to show orders from the previous thirty days. Change the dates to a specific date range of transactions. The Order list table shows the user who submitted the order, the date the order was submitted, and the status of the order.
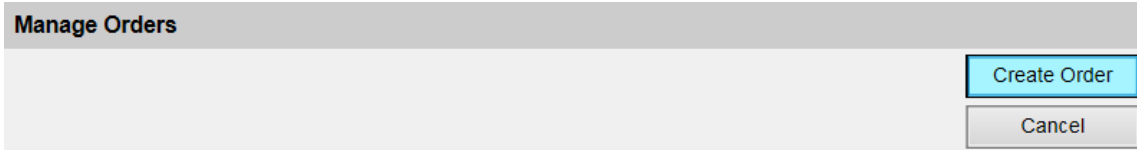
Order List	Show: ⦿ Current ◯ Historical ◯ Both ◯ Flu ◯ Flu Historical

Current Orders

User	Submit Date	Status	Order #
Joseph Zehner	05/10/2017	SHIPPED	2991
Joseph Zehner	05/10/2017	SENT TO DISTRIBUTOR	2990
Joseph Zehner	05/10/2017	IN PROGRESS	2989
Joseph Zehner	05/10/2017	SHIPPED	2988
Joseph Zehner	05/10/2017	PENDING	2987

The following are order statuses in IRIS:
  i.   **Pending**: Indicates the order has been created and submitted. Orders with this status can still be modified in IRIS.
  ii. **In Progress**: Indicates the order is being filled by IDPH, and orders with this status may no longer be modified through IRIS. To alter an order at this stage, call the Immunization Program at 1-800-831-6293 x5.
  iii. **Sent to Distributor**: Indicates the order has been sent to the distributor.
  iv. **Shipped**: Indicates the order has been shipped and is ready to be accepted by the provider organization.
  v.   **Split Ship**: Indicates part of the order has been shipped and the remaining items are back-ordered.
  vi. **Accepted**: Indicates the order has been accepted into the provider organization's inventory.
  vii. **Cancelled**: Indicates the order has been cancelled.

3) To create an order, click the **Create Order** button in the Manage Orders section.
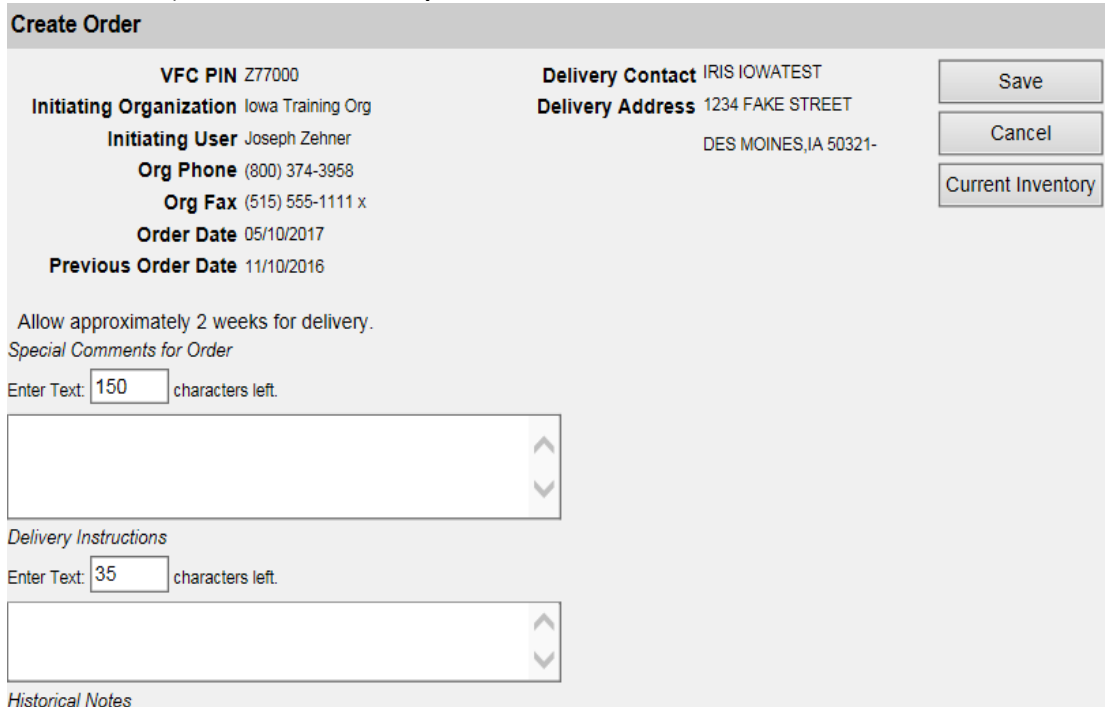
Manage Orders

Create Order

Cancel

a. If a previous order has been ready to accept for more than 3 business days, the manage order page will display the message below and not allow an order to be placed until the previous order has been accepted. To accept the order, click the Manage Transfers link and follow the steps outlined below to accept a VFC order.

Manage Orders

A new vaccine order cannot be created until outstanding orders are accepted. Go to the Manage Transfers Page to accept the outstanding order(s).

4) On the Create Order page, the organization's information will display along with the name of the person creating the order. There will be two free text boxes. In the first text box, type any special comments about the order (such as "Ordering more vaccine than normal due to kindergarten round-up"). In the second text box, type any delivery instructions for the order (such as "Please deliver to the front door"). Both text boxes are **optional**.

Create Order

VFC PIN Z77000	**Delivery Contact** IRIS IOWATEST
Initiating Organization Iowa Training Org	**Delivery Address** 1234 FAKE STREET
Initiating User Joseph Zehner	DES MOINES,IA 50321-
Org Phone (800) 374-3958	
Org Fax (515) 555-1111 x	
Order Date 05/10/2017	
Previous Order Date 11/10/2016	

Save

Cancel

Current Inventory

Allow approximately 2 weeks for delivery.
Special Comments for Order

Enter Text: 150   characters left.

Delivery Instructions

Enter Text: 35   characters left.

Historical Notes

5) Vaccine delivery hours are **required** when submitting a vaccine order. Select a check box next to the day(s) in which the organization will be accepting orders. Proceed to select the appropriate time from the dropdown menu in which the organization will accept an order. For example, if an organization is not accepting orders during the lunch hour, vaccine delivery hours can be broken down between

Delivery Window 1 and Delivery Window 2. The hours entered will carry-over with each subsequent vaccine order.

Created by	Create Date	Note			

Delivery Days and Times

		Delivery Window 1		Delivery Window 2	
☑	Monday	9:00 AM To 4:00 PM		5:00 PM To 8:00 PM	
☑	Tuesday	9:00 AM To 5:00 PM		To	
☑	Wednesday	9:00 AM To 5:00 PM		To	
☑	Thursday	9:00 AM To 5:00 PM		To	
☑	Friday	9:00 AM To 5:00 PM		To	
☑	Saturday	6:00 PM To 10:00 PM		To	
☐	Sunday	To		To	

6) Select the vaccines needed from the list of Orderable Vaccines. Enter the amount of doses being ordered in the 'Doses Ordered' field. This field will round up to the nearest package size. Only enter doses for one component of a combination vaccine.
   a. Doses Administered (EOQ): displays the amount of doses the provider organization administered during the same time period the previous year.
   b. Doses on Hand: displays how many doses of the NDC number the provider organization has on hand.
   c. Recommended Order Qty: this is the recommended order quantity for the provider organization. IRIS calculates this value based on the number of doses on hand compared to the number of doses used during the same period last year.

Orderable Vaccines

Vaccine Group	Trade Name	Packaging	NDC Number	Ordering Intention	Doses Admin (EOQ)	Doses on Hand	Recommended Order Qty	Doses Ordered
DTAP	Adacel	TDAP SDV 10-PACK	49281-0400-10	PED	0	0	0	
DTAP	Adacel	TDAP SYR 5-PACK	49281-0400-15	PED	0	0	0	
DTAP	Boostrix	TDAP SDV 10-PACK	58160-0842-11	PED	0	0	0	
DTAP	Boostrix	TDAP SYR 10-PACK	58160-0842-52	PED	29	68	0	
DTAP	DAPTACEL	DTAP SDV 10-PACK	49281-0286-10	PED	0	0	0	
DTAP	DT	DT SDV 10-PACK	49281-0225-10	PED	0	0	0	
DTAP	Infanrix	DTAP SDV 10-PACK	58160-0810-11	PED	0	0	0	
DTAP	Infanrix	DTAP SYR 10-PACK	58160-0810-52	PED	39	59	0	
DTAP	Kinrix	DTAP-IPV SDV 10-PACK	58160-0812-11	PED	3	0	10	10
DTAP	Kinrix	DTAP-IPV SYR 10-PACK	58160-0812-52	PED	28	52	0	
DTAP	Pediarix	DTAP-IPV-HEPB SYR 10-PACK	58160-0811-52	PED	148	138	90	90

7) Confirm all the vaccines needed for the ordering period are entered. Click Save to submit the vaccine order.

Create Order

VFC PIN Z77000	**Delivery Contact** IRIS IOWATEST
Initiating Organization Iowa Training Org	**Delivery Address** 1234 FAKE STREET
Initiating User Joseph Zehner	DES MOINES,IA 50321-
Org Phone (800) 374-3958	
Org Fax (515) 555-1111 x	

[Save] [Cancel] [Current Inventory]

Note: View the organization's current inventory by clicking the Current Inventory button in the Create Order section. This will open in a new window.

8) Once saved, the order will display on the top of the Current Order list. If the status displays as Pending, the order can still be edited. To edit the order, click the **Pending** link.

Current Orders

User	Submit Date	Status	Order #
Joseph Zehner	05/10/2017	PENDING	2992

9) This will open the **Modify Order** screen for that order.
   a. Remove any of the vaccines included in the order by clicking the checkmark box next to the vaccine being removed from the order.

Vaccines Ordered

Remove	Vaccine	Trade Name	Packaging Description	NDC	Ordering Intention	Doses on Hand	Doses Admin	Rec Order Qty	Qty Ordered
☑	DTaP-HepB-IPV	Pediarix	DTAP-IPV-HEPB SYR 10-PACK	58160-0811-41	PED	0	0	0	90
☐	DTaP-IPV	Kinrix	DTAP-IPV SDV 10-PACK	58160-0812-52	PED	35	0	0	30

   b. Add vaccine to the order by typing how many doses for the NDC.

Vaccines Ordered

Remove	Vaccine	Trade Name	Packaging Description	NDC	Ordering Intention	Doses on Hand	Doses Admin	Rec Order Qty	Qty Ordered
☐	HepB-Peds	Engerix-B Peds	HEP B (PED) SYR 10-PACK	58160-0820-52	PED	6	0	0	10
☐	MMR	MMR II	MMR SDV 10-PACK	00006-4681-00	PED	19	1	0	20
☐	Meningococcal B, OMV	BEXSERO	1 X 10 SYR	58160-0976-20	PED	13	0	0	20
☐	Polio-Inject	IPOL	IPV MDV10 1-PACK	49281-0860-10	PED	15	1	0	20
☐	Varicella	Varivax	VAR SDV 10-PACK	00006-4827-00	PED	9	2	0	20

Orderable Vaccines

Vaccine Group	Trade Name	Packaging	NDC Number	Ordering Intention	Doses Admin (EOQ)	Doses on Hand	Recommended Order Qty	Doses Ordered
DTAP	Adacel	TDAP SDV 10-PACK	49281-0400-10	PED	0	0	0	10

c. Click the **Submit Updates** button to save and submit the vaccine order. To delete the Order, click the **Delete Order** button. To cancel and go back, click the **Cancel** button.

Modify Order		
VFC PIN Z77000	**Delivery Contact** IRIS IOWATEST	Submit Updates
Initiating Organization Iowa Training Org	**Delivery Address** 1234 FAKE STREET	Delete Order
Initiating User Joseph Zehner	DES MOINES,IA 50321-	Cancel
Org Phone (800) 374-3958		Current Inventory
Org Fax (515) 555-1111 x		
Order Date 05/10/2017		
Previous Order Date 11/10/2016		

XII. Accepting VFC Vaccine Orders

1. When the order is ready to be accepted, a number in the Shipped column of the Order(s) line in the Vaccine Order/Transfer Notification table will display on the IRIS home page.

Vaccine Order/Transfer Notification ...

Type	Shipped	Awaiting Return Shipment	Rejected
Order(s)	3	0	0
Transfer(s)		No Transfer Notification	

a. If a vaccine order has been ready to accept for more than 3 business days, this number will appear in pink, and additional vaccine orders cannot be placed until the outstanding order is accepted into IRIS inventory.

Vaccine Order/Transfer Notification ...

Type	Shipped
Order(s)	1

2. Click the 'manage transfers' link under the Inventory section on the left menu panel:

Inventory
manage inventory
manage orders
manage transfers

3. On the Manage Transfers page, orders needing to be accepted will be listed in the 'Inbound Transfer' table. To begin accepting the order, click the blue link under the Transfer ID column:

Inbound Transfer

Create Date	Type	Transfer ID	Order ID	Sending Org	Receiving Org	Ship Date	Accept Date	Return Date
05/30/2013	ORDER	1221	1681	Iowa Immunization Program	IRISINV	05/30/2013		
05/30/2013	ORDER	1220	1681	Iowa Immunization Program	IRISINV	05/30/2013		
05/30/2013	ORDER	1219	1681	Iowa Immunization Program	IRISINV	05/30/2013		

4. On the Receive Transfer page, information is displayed regarding the sending and receiving organization, vaccine information, including lot number, the amount of doses and the inventory action that will occur once the order is accepted. The action will confirm if it will create a new lot or merge with an existing lot number in inventory.

| Transfer Number 1221		Created on 05/30/2013					
Sending Entity				**Receiving Entity**			
Organization	Iowa Immunization Program			*Organization*	IRISINV		
Address	221 E 12 ST			*Address*	987 WEST ST		
	DES MOINES,IA 50319				IOWA FALLS,IA 88888		
Contact	SHELBY TOOZE			*Contact*	TWO ONE		
Phone #				*Phone #*	(555) 614-4444		
				Order #	1681		
Ship Date	05/30/2013						

Transfer Vaccine Item							
Vaccine Group	Trade Name	Lot Number	Inventory Action		Transfer Quantity	Order Line Number	Shipping Info
Td/Tdap - DTP/aP	Boostrix (58160-0842-99)	997654	Create New Lot		40	003531	FDX2

5. After reviewing the information, accept the order by clicking the 'Accept Transfer' button:

Receive Transfer	**Order ID 1681**
Accept Entire Transfer....	Accept Transfer
Reject Entire Transfer....	Reject Transfer
Partially Accept Transfer....	Partially Accept
Return to the Previous Screen....	Cancel

6. A message will appear asking if to confirm adding the item(s) into inventory. Click OK to continue:

> **Message from webpage**
>
> ? Are you sure you want to add all transfer items into inventory ?
>
> OK   Cancel
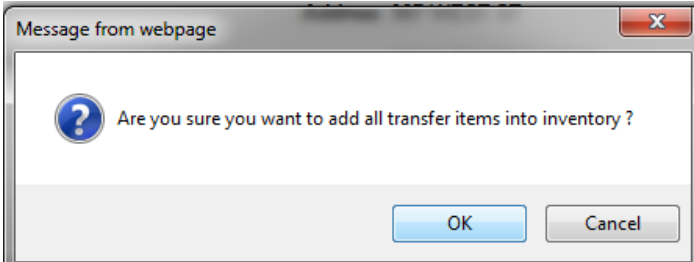
7. The message, 'Transfer Successfully Accepted' will display. The accepted vaccine will appear in the organization's inventory. For non-inventory organizations, the order will not appear in IRIS inventory:

Manage Transfer	**Transfer Successfully Accepted**
Create a New Transfer....	New Transfer
Return to the Previous Screen....	Cancel

8. Follow these steps to accept each vaccine into the organization's inventory. Once all products within the order have been accepted, the order status will display as 'Accepted' and will become a historical order.

XIII. Manage Returns

Any adjustments made to VFC inventory in IRIS using the following reason codes will require providers to return vaccines to McKesson.

- Expired
- Natural Disaster/Power Outage
- Refrigerator Too Warm
- Refrigerator Too Cold
- Failure to store properly upon receipt
- Vaccine spoiled in transit
- Mechanical Failure
- Spoiled
- Recall

To return nonviable vaccines:

1) Users will be notified of returns to be processed when navigating to the 'Show Inventory' menu in IRIS. A message will display to inform providers to return nonviable vaccine via the Manage Nonviable Vaccine Returns process. Select 'OK' to close the message. Users will continue to receive this notification until all VFC returns have been processed.
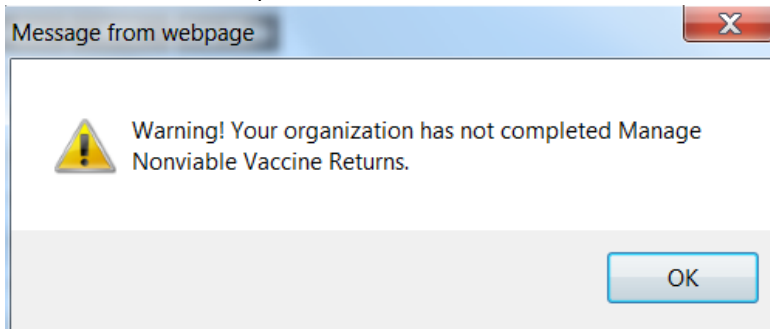
2) To create a return, select the 'manage returns' link under the Inventory section of the menu panel.
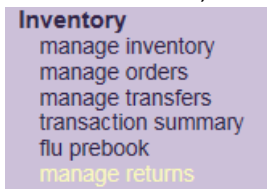
3) On the Manage Returns page, select the 'Create Return' button.

4) The Create Nonviable Vaccine Returns page includes vaccine return reasons and contains all VFC doses adjusted from the organization's inventory. To return vaccines, select the section header for the specific reason code. Reason codes with a down arrow indicate return vaccines are included.

5) The vaccine, trade name, lot number, and number of modified doses will display for each reason code. To return doses, type the number of doses for each lot number being returned in the '# Doses returned' field.

Expired ▼

Vaccine	Trade Name	Manufacturer	Packaging	NDC Number	Lot Number	Expiration Date	Modified Qty	# Doses returned	Return Type
HPV, Quadrivalent	Gardasil	MSD	HPV SDV 10-PACK	00006-4045-41	GARD-20	01/01/2019	4	4	RETO
Tdap	Boostrix	SKB	TDAP SYR 10-PACK	58160-0842-41	J00123	01/01/2019	4		RETO

Natural Disaster/power outage

Refrigerator too warm

Refrigerator too cold

Failure to store properly upon receipt ▼

Vaccine	Trade Name	Manufacturer	Packaging	NDC Number	Lot Number	Expiration Date	Modified Qty	# Doses returned	Return Type
HPV, Quadrivalent	Gardasil	MSD	HPV SDV 10-PACK	00006-4045-41	GARD-20	01/01/2019	6	6	RETO
Tdap	Boostrix	SKB	TDAP SYR 10-PACK	58160-0842-41	J00123	01/01/2019	6		RETO

Vaccine spoiled in transit

Mechanical Failure

Spoiled ▼

Vaccine	Trade Name	Manufacturer	Packaging	NDC Number	Lot Number	Expiration Date	Modified Qty	# Doses returned	Return Type
HPV, Quadrivalent	Gardasil	MSD	HPV SDV 10-PACK	00006-4045-41	GARD-20	01/01/2019	20	20	RETO
Tdap	Boostrix	SKB	TDAP SYR 10-PACK	58160-0842-41	J00123	01/01/2019	10	10	RETO

Recall

6) Only full, unopened multi-dose vials can be returned. Users will be unable to return partial multi-dose vials. Partial multi-doses vials will continue to be displayed until the expiration date.

Spoiled ▼

Vaccine	Trade Name	Manufacturer	Packaging	NDC Number	Lot Number	Expiration Date	Modified Qty	# Doses returned	Return Type
HPV, Quadrivalent	Gardasil	MSD	HPV SDV 10-PACK	00006-4045-41	GARD-20	01/01/2019	20		RETO
Polio-Inject	IPOL	AVENTIS	INACT. POLIO-IPOL-10 DOSE VIAL	49281-0860-10	IPOL234	12/12/2018	1	1	RETO
Tdap	Boostrix	SKB	TDA...						

Recall

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Message from webpage ☒

⚠ Only full, unopened multi-dose vials can be returned!

OK

7) Once all doses being returned have been entered, select the 'Submit Return' button.

8) The submitted return will display in a 'Processed' status, grouped by the return reason code.

9) Select the 'Processed' status link to review the return. The view return page will display, and the user can verify returned items.

10) Iowa VFC Program staff will review and submit the nonviable vaccine return to CDC. The status of the return will change from 'Processed' to 'Sent to CDC'. Users can view the return by selecting the 'Sent to CDC' link. The provider's VFC contact will receive an email notification from McKesson which includes the return label for the nonviable vaccine return shipment.

Create Return				
VFC PIN	Z77000	**Delivery Contact**	IRIS IOWATEST	Create Return
Initiating Organization	Iowa Training Org	**Delivery Address**	1234 FAKE STREET	Cancel
initiating User	Joseph Zehner			
Org Phone	(800) 374-3958		DES MOINES IA 50321	
Org Fax	(515) 555-1111	**Email Address**	Iristestorg@iristestorg.com	

Returns List   Show : ⦿ Current ◯ Historical ◯ Both

Current Returns

User	Submit Date	Status	Return ID
Joseph Zehner	10/28/2016	PROCESSED	0104
Joseph Zehner	10/28/2016	PROCESSED	0103
Joseph Zehner	10/28/2016	PROCESSED	0102
Joseph Zehner	10/28/2016	PROCESSED	0101
Joseph Zehner	10/28/2016	SENT TO CDC	0081
Joseph Zehner	10/27/2016	SENT TO CDC	0054
Joseph Zehner	10/27/2016	SENT TO CDC	0053

XIV. Flu Prebook

Vaccines for Children (VFC) providers can submit flu prebook orders in IRIS. This occurs annually in January/February for the upcoming flu season. The Iowa Immunization Program sends notifications when flu prebook is available in IRIS.

1) Click the 'flu prebook' link under the Inventory section of the menu panel.

Inventory
manage inventory
manage orders
manage transfers
transaction summary
flu prebook
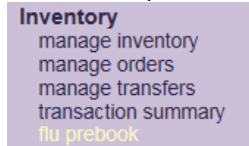
2) Type special comments for the order, delivery instructions, or update the delivery days and times for the organization, if needed.

Special Comments for Order
Enter Text: 150 characters left.

Delivery Instructions
Enter Text: 35 characters left.

Historical Notes

Created by	Create Date	Note

Delivery Days and Times

	Delivery Window 1	Delivery Window 2
☑ Monday	8:00 AM To 12:00 PM	1:00 PM To 5:00 PM
☑ Tuesday	9:00 AM To 12:00 PM	1:00 PM To 5:00 PM
☑ Wednesday	9:00 AM To 4:00 PM	8:00 PM To 10:00 PM
☑ Thursday	9:00 AM To 12:00 PM	1:00 PM To 9:00 PM
☑ Friday	7:00 AM To 12:00 PM	1:00 PM To 5:00 PM
☑ Saturday	7:00 AM To 12:00 PM	1:00 PM To 5:00 PM
☑ Sunday	7:00 AM To 12:00 PM	1:00 PM To 5:00 PM

3) The influenza vaccines available to prebook are listed and displayed by Trade Name, Packaging, and NDC number. Enter the number of doses requested for the specific NDC in the Doses Requested column. If the value entered is not equivalent to the package, the amount will round up to the nearest package size.

Pre-Book Influenza Vaccines

Vaccine Group	Trade Name	Packaging	NDC Number	Ordering Intention	Doses Requested	Doses Distributed	Last Distributed Date	Doses Remaining
FLU	FluLaval Quadrivalent	Influenza, injectable, quadrivalent MDV 10 1-Pack	19515-0895-11	PED	120			0
FLU	FluMist Quadrivalent	Influenza, intranasal, quadrivalent 10-Pack Sprayers	66019-0300-10	PED	70			0
FLU	Fluarix Quad, P-free	influenza, injectable, quadrivalent, p-free SYR 10-Pack	58160-0900-52	PED	60			0
FLU	Fluzone Quadrivalent	Influenza, quadrivalent MDV10 1-Pack	49281-0623-15	PED	220			0
FLU	Fluzone quad, P-free Peds	Influenza, quadrivalent, preservative free, SYR 10-pack	49281-0513-25	PED	240			0

4) After entering the quantities for each product ordered, select Save to submit the influenza vaccine prebook order.

5) A pop-up message displays, stating the "Flu Prebook order has been submitted". Select OK to continue.
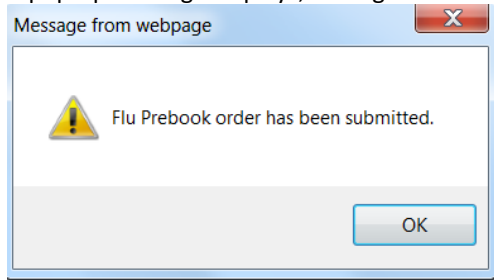
6) Verify the influenza prebook order has been submitted by selecting the flu prebook link. A message in red indicates when the prebook was submitted or last updated.

7) If edits need to be made to the influenza prebook order before the prebook period has ended, select the flu prebook link and update the amount in the doses requested field and select Save. Each time the flu prebook page is updated, a confirmation message will appear, and the submitted date will be updated.

8) Once the flu prebook period has ended, edits can no longer be made to the flu prebook order page, and the amount in the doses requested column will no longer be editable.

Pre-Book Influenza Vaccines

Vaccine Group	Trade Name	Packaging	NDC Number	Ordering Intention	Doses Requested
FLU	FluLaval Quadrivalent	Influenza, injectable, quadrivalent MDV 10 1-Pack	19515-0895-11	PED	140
FLU	FluMist Quadrivalent	Influenza, intranasal, quadrivalent 10-Pack Sprayers	66019-0300-10	PED	50
FLU	Fluarix Quad, P-free	influenza, injectable, quadrivalent, p-free SYR 10-Pack	58160-0900-52	PED	60
FLU	Fluzone Quadrivalent	Influenza, quadrivalent MDV10 1-Pack	49281-0623-15	PED	220
FLU	Fluzone quad, P-free Peds	Influenza, quadrivalent, preservative free, SYR 10-pack	49281-0513-25	PED	240

9) If the Vaccines for Children (VFC) Program makes any changes to an organization's flu prebook order, the historical notes section on the flu prebook page will reflect the change as displayed below.

Historical Notes

Created By	Create Date	Note
Zehner, Joseph	06/14/2016 09:28 AM	NDC # 66019-0300-10, intention PED, IDPH altered doses requested to 50.

Delivery Days and Times

		Delivery Window 1			Delivery Window 2	
✓	Monday	8:00 AM ⌄	To 12:00 PM ⌄	1:00 PM ⌄	To 5:00 PM ⌄

10) Once the VFC Program begins distributing doses, the flu prebook page will update to indicate the amount of doses distributed, the last distributed date, and the doses remaining to be distributed. This page will update with each influenza vaccine order sent to the organization.

Pre-Book Influenza Vaccines

Vaccine Group	Trade Name	Packaging	NDC Number	Ordering Intention	Doses Requested	Doses Distributed	Last Distributed Date	Doses Remaining
FLU	FluLaval Quadrivalent	Influenza, injectable, quadrivalent MDV 10 1-Pack	19515-0895-11	PED	140	20	06/14/2016	120
FLU	FluMist Quadrivalent	Influenza, intranasal, quadrivalent 10-Pack Sprayers	66019-0300-10	PED	50	40	06/14/2016	10
FLU	Fluarix Quad, P-free	influenza, injectable, quadrivalent, p-free SYR 10-Pack	58160-0900-52	PED	60	20	06/14/2016	40
FLU	Fluzone Quadrivalent	Influenza, quadrivalent MDV10 1-Pack	49281-0623-15	PED	220	100	06/14/2016	120
FLU	Fluzone quad, P-free Peds	Influenza, quadrivalent, preservative free, SYR 10-pack	49281-0513-25	PED	240			240

11) The status of an organization's flu prebook order can be viewed through the manage orders link under the Inventory section of the menu panel.

Inventory
   manage inventory
   manage orders
   manage transfers
   transaction summary
   flu prebook
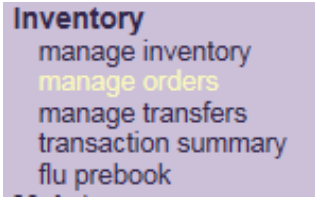
12) The manage orders page includes a filter to display flu prebook orders. To view the orders, select the Flu radio button. Flu prebook orders have the same status as other VFC orders:
   a. **Processed** - IDPH has satisfied each line item in the order and has selected the Submit/Save button. Orders will stay in a status of Processed until it has been sent to the distributor.
   b. **Sent to Distributor** - the order has been sent to the distributor for filling of the order.
   c. **Shipped** - the order has been completely fulfilled and is ready for the organization to accept the vaccine into their inventory.
   d. **Accepted** - the order was accepted by the organization. This type of order can no longer be modified, and is considered a historical order.

Manage Orders

Create Order

Cancel

Order List   Show: ○ Current ○ Historical ○ Both ◉ Flu ○ Flu Historical

Current Flu Orders

| User	Submit Date	Status	Order #
Joseph Zehner	06/14/2016	PROCESSED	2767
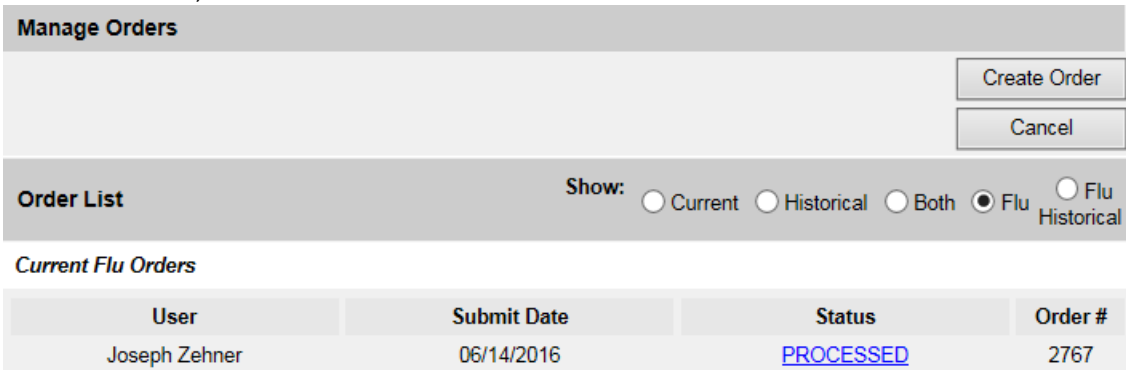
13) The Vaccines for Children Program distributes doses as quickly as they become available. Privately purchased flu vaccine is generally available prior to VFC flu vaccine. Distribution of VFC flu vaccine orders can be monitored using the Vaccine Order/Transfer Notification table on the IRIS home page. When influenza vaccine orders are shipped, a number will display in the Shipped column of the Order(s) line. The process to accept influenza vaccine into inventory is the same as other VFC vaccine orders.

Vaccine Order/Transfer Notification ...

Type	Shipped	Awaiting Return Shipment	Rejected
Order(s)	3	0	0
Transfer(s)		No Transfer Notification	

14) Select the 'manage transfers' link under the Inventory section on the left menu panel.

Inventory
   manage inventory
   manage orders
   manage transfers ⬅
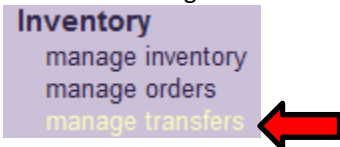
15) On the Manage Transfers page, orders needing to be accepted are listed in the 'Inbound Transfer' table. To begin accepting the order, select the blue hyperlink under the Transfer ID column.

Inbound Transfer

Create Date	Type	Transfer ID	Order ID	Sending Org	Receiving Org	Ship Date	Accept Date	Return Date
05/30/2013	ORDER	1221	1681	Iowa Immunization Program	IRISINV	05/30/2013		
05/30/2013	ORDER	1220	1681	Iowa Immunization Program	IRISINV	05/30/2013		
05/30/2013	ORDER	1219	1681	Iowa Immunization Program	IRISINV	05/30/2013		

16) On the Receive Transfer page, information is displayed regarding the sending and receiving organization, vaccine information, including lot number, the amount of doses and the inventory action that will take place once the order is accepted. This action will inform the user if a new lot is created or merged with an existing lot number in inventory.

Transfer Number 1643   **Created on 06/14/2016**

Sending Entity		Receiving Entity	
Organization Iowa Immunization Program		*Organization* Joey Training Org Test	
Address 221 E 12 ST		*Address* 123 FOURTH STREET	
DES MOINES,IA 50319		SUPER EXTRA LONG CITY,IA 55555	
Contact SHELBY TOOZE		*Contact* JOSEPH Zehner	
Phone #		*Phone #* (989) 576-1511	
		Order # 2767	
Ship Date 06/14/2016			

Transfer Vaccine Item

Vaccine Group	Trade Name	Lot Number	Inventory Action	Transfer Quantity	Order Line Number	Shipping Info
Influenza-seasnl	Fluzone Quadrivalent (49281-0623-15)	flu456	Create New Lot	100	004048	UPS

17) After reviewing the information, accept the order by selecting the 'Accept Transfer' button.

Receive Transfer	Order ID 1681
Accept Entire Transfer....	Accept Transfer
Reject Entire Transfer....	Reject Transfer
Partially Accept Transfer....	Partially Accept
Return to the Previous Screen....	Cancel

18) A message will display to verify the addition of the item(s) into inventory. Select OK to continue.

Message from webpage

Are you sure you want to add all transfer items into inventory ?

OK   Cancel

19) The message will display, 'Transfer Successfully Accepted'. The accepted vaccine will appear in the organization's inventory. For organizations that do not use inventory in IRIS, the order will not appear in the inventory:

20) Follow these steps to accept each vaccine in the order into the organization's inventory. Once all vaccines have been accepted, the order status will display as 'Accepted' and will become a 'flu historical' order.

XV.   Patient Specific Reports

For all patients in IRIS, the following reports can be generated from the Patient Reports Screen:
- Immunization History Report
- Immunizations Needed
- Provisional Certificate of Immunization
- Certificate of Immunization
- Master Index Card
- Patient Reminder Letter

Immunization History Report
The Immunization History Report displays demographics, contact information, and a detailed summary of the patient's full immunization history. This report should be provided to parents and guardians as requested. To generate the Immunization History report:

1. From a patient's Manage Patient screen or Manage Immunizations screen, click the **Reports** button.
2. At the Reports Available for this Patient section, click the **Immunization History Report** link.
3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.
4. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.

5. To return to the Patient Reports screen, close the Acrobat Reader® by clicking the X button in the upper right corner of the Immunization History Report window.

02 June 2017

Iowa Immunization Registry Information System
Iowa Training Org
Immunization History Report

Patient ID:	Tracking Schedule: **ACIP**
Patient Name: **PATIENT TEST**	
Birth Date: **01/01/2010** Gender: **Female**	
Age: **7 years, 5 months, 1 day**	

Immun	Date Admin	Series	Vaccine [Trade Name]	Dose	Mfg Code	Lot #	Bod Rt.	Bod St.	Provider of Information	React
DTP/aP	03/01/2010	1 of 5	DTaP, NOS [DTaP, NOS ™]	Full		DF345			Iowa Training Org	
DTP/aP	05/01/2010	2 of 5	DTaP, NOS [DTaP, NOS ™]	Full		DF345			Iowa Training Org	
DTP/aP	07/01/2010	3 of 5	DTaP, NOS [DTaP, NOS ™]	Full		JD797			Iowa Training Org	
DTP/aP	01/01/2011	4 of 5	DTaP, NOS [DTaP, NOS ™]	Full		54TEF			Iowa Training Org	
HepA	01/01/2011	1 of 2	HepA, NOS [HepA, NOS ™]	Full		M00489			Iowa Training Org	
HepA	07/01/2011	2 of 2	HepA, NOS [HepA, NOS ™]	Full		N00745			Iowa Training Org	
HepB	01/01/2010	1 of 3	HepB, NOS [HepB ™]	Full					Iowa Training Org	
HepB	03/01/2010	2 of 3	HepB, NOS [HepB ™]	Full					Iowa Training Org	

Immunizations Needed Report

The Immunizations Needed report displays demographics, contact information, immunization record, and immunizations recommended by date according to the Advisory Committee on Immunization Practices (ACIP) tracking schedule. This report can be provided to parents and guardians for their records and helps identify upcoming immunizations needed for their children. In addition, it provides a place for the next appointment date and organization phone number. To generate the Immunizations Needed report:

1. From a patient's Manage Patient screen or Manage Immunizations screen, click the **Reports** button.
2. At the Reports Available for this Patient section, click the **Immunization Needed Report** link.
3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.
4. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
5. To return to the Patient Reports screen, close the Acrobat Reader® by clicking the X button in the upper right corner of the Immunizations Needed Report window.

Immunization Record				
Vaccine Group	**Date Admin**	**Series**	**Vaccine [Trade Name]**	**Dose**
DTP/aP	03/01/2010	1 of 5	DTaP, NOS	Full
DTP/aP	05/01/2010	2 of 5	DTaP, NOS	Full
DTP/aP	07/01/2010	3 of 5	DTaP, NOS	Full
DTP/aP	01/01/2011	4 of 5	DTaP, NOS	Full
HepA	01/01/2011	1 of 2	HepA, NOS	Full
HepA	07/01/2011	2 of 2	HepA, NOS	Full
HepB	01/01/2010	1 of 3	HepB, NOS	Full
HepB	03/01/2010	2 of 3	HepB, NOS	Full
HepB	07/01/2010	3 of 3	HepB, NOS	Full
Hib	03/01/2010	1 of 4	Hib, NOS	Full
Hib	05/01/2010	2 of 4	Hib, NOS	Full
Hib	07/01/2010	3 of 4	Hib, NOS	Full
Influenza-seasnl	06/08/2016		Influenza, seasonal, injectable	Full
MMR	01/01/2011	1 of 2	MMR	Full
PneumoConjugate	03/01/2010	1 of 4	PCV7	Full
PneumoConjugate	05/01/2010	2 of 4	PCV7	Full
PneumoConjugate	07/01/2010	3 of 4	PCV7	Full
Polio	07/01/2010	1 of 4	Polio, NOS	Full
Varicella	01/01/2011	1 of 2	Zoster	Full

Immunizations Due Record	
Vaccine	**Date Needed**
HepA	
HepB	
Influenza-seasnl	07/06/2016
MMR	01/01/2014
Polio	07/29/2010
Td/Tdap	01/01/2017
Varicella	01/01/2014

TEST, PATIENT   6/2/17 3:50 PM

Provisional Certificate of Immunization

The Provisional Certificate of Immunization is used when a child has begun but not completed the vaccines required for entry into licensed child care and school in the state of Iowa. To generate the Provisional Certificate of Immunization:

1. From a patient's Manage Patient screen or Manage Immunizations screen, click the **Reports** button.
2. At the Reports Available for this Patient section, click the **Provisional Certificate of Immunization** link.
3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.
4. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
5. To return to the Patient Reports screen, close the Acrobat Reader® by clicking the X button in the upper right corner of the Provisional Certificate of Immunization Report window.

Iowa Department of Public Health
Provisional Certificate of Immunization

The applicant shall submit this certificate to the admitting official of the school or child care center. A copy of this certificate should be provided to the applicant, parent, or guardian.

Name Last: TEST   First: PATIENT   Middle: Date of Birth: 01/01/2010

This applicant qualifies for a provisional enrollment for one of the following reasons (select one):

☐ Has received at least one dose of each of the required vaccines but has not completed all the required immunizations or;

☐ Is a transfer student from another school system. (A transfer student is an applicant seeking enrollment from one U.S. domestic elementary or secondary school to another)

The amount of time allowed for provisional enrollment shall be as rapidly as medically feasible but shall not exceed 60 calendar days. The period of provisional enrollment shall begin on the date the certificate is signed. To be valid, the certificate shall be completed in its entirety including an expiration date and list of remaining vaccines required to qualify for a Certificate of Immunization:

Certificate Expiration Date: _____

Remaining vaccine(s) required:

_____

_____

I certify that the above named applicant is hereby issued a Provisional Certificate of Immunization and I have informed the applicant, parent, or guardian of the provisional enrollment requirements.

Signature: _____
Physician (MD or DO), Physician Assistant, Nurse, or Certified Medical Assistant

Date: _____

Record of Immunization

		Vaccine	Date Given	Doctor / Clinic / Source
Diphtheria, Tetanus, Pertussis DTaP/DTP/DT/ Td/Tdap	1	DTaP, NOS	03/01/2010	Iowa Training Org
	2	DTaP, NOS	05/01/2010	Iowa Training Org
	3	DTaP, NOS	07/01/2010	Iowa Training Org
	4	DTaP, NOS	01/01/2011	Iowa Training Org
	5			
	6			
Polio IPV/OPV	1	Polio, NOS	07/01/2010	L1100-1
	2			
	3			
	4			
Measles, Mumps, Rubella MMR	1	MMR	01/01/2011	Iowa Training Org
	2			
***Haemophilus influenzae* type b** Hib	1	Hib, NOS	03/01/2010	Iowa Training Org
	2	Hib, NOS	05/01/2010	Iowa Training Org
	3	Hib, NOS	07/01/2010	Iowa Training Org
	4			
Hepatitis B	1	HepB, NOS	01/01/2010	Iowa Training Org
	2	HepB, NOS	03/01/2010	Iowa Training Org
	3	HepB, NOS	07/01/2010	Iowa Training Org
	4			
Varicella If applicant has a history of natural disease write "Immune to Varicella"	1	Zoster	01/01/2011	Iowa Training Org
	2			
Pneumococcal PCV	1	PCV7	03/01/2010	Iowa Training Org
	2	PCV7	05/01/2010	Iowa Training Org
	3	PCV7	07/01/2010	Iowa Training Org
	4			
Meningococcal (A, C, W, Y)	1			
	2			

January 2017

Certificate of Immunization

This Certificate of Immunization is required for children entering licensed child care and school in the state of Iowa. To generate the Certificate of Immunization:

1. From a patient's Manage Patient screen or Manage Immunizations screen, click the **Reports** button.
2. At the Reports Available for this Patient section, click the **Certificate of Immunization** link.
3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.
4. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
5. To return to the Patient Reports screen, close the Acrobat Reader® by clicking the X button in the upper right corner of the Certificate of Immunization Report window.

Iowa Department of Public Health
Certificate of Immunization

VIDPH

Name Last: TEST   First: PATIENT   Middle: Date of Birth: 01/01/2010

Parent/Guardian: TEST, MOM   Address: 321 E 12TH ST, DES MOINES , IA 50321   Phone: (515) 111-1111

I certify that the above named applicant has a record of age-appropriate immunizations that meet the requirement for licensed child care or school enrollment.

Signature: Date:

Physician, Physician Assistant, Nurse, or Certified Medical Assistant

A representative of the local Board of Health or Iowa Department of Public Health may review this certificate for survey purposes.

Diphtheria, Tetanus, Pertussis DTaP/DTP/DT/ Td/Tdap	Vaccine	Date Given	Doctor / Clinic / Source
	DTaP, NOS	03/01/2010	Iowa Training Org
	DTaP, NOS	05/01/2010	Iowa Training Org
	DTaP, NOS	07/01/2010	Iowa Training Org
	DTaP, NOS	01/01/2011	Iowa Training Org
Polio IPV/OPV	Polio, NOS	07/01/2010	L1100-1
Measles, Mumps, Rubella MMR	MMR	01/01/2011	Iowa Training Org
Haemophilus influenzae type b Hib	Hib, NOS	03/01/2010	Iowa Training Org
	Hib, NOS	05/01/2010	Iowa Training Org
	Hib, NOS	07/01/2010	Iowa Training Org
Hepatitis B	HepB, NOS	01/01/2010	Iowa Training Org
	HepB, NOS	03/01/2010	Iowa Training Org
	HepB, NOS	07/01/2010	Iowa Training Org

	Vaccine	Date Given	Doctor / Clinic / Source
Varicella Chicken Pox *If applicant has a history of natural disease write "Immune to Varicella"*	Zoster	01/01/2011	Iowa Training Org
Pneumococcal PCV/PPSV	PCV7	03/01/2010	Iowa Training Org
	PCV7	05/01/2010	Iowa Training Org
	PCV7	07/01/2010	Iowa Training Org
Meningococcal MCV/MPSV/ Mening B			
Hepatitis A	HepA, NOS	01/01/2011	Iowa Training Org
	HepA, NOS	07/01/2011	Iowa Training Org
Rotavirus			
Human Papilloma Virus HPV			
Other			

January 2013

Master Index Card

This is an internal document for health care providers in Iowa to maintain a patient's immunizations. It is not an official Certificate of Immunization. Historical immunizations will list the name of the provider organization who entered the immunization into IRIS in the health care provider field, unless the name of the organization who vaccinated the patient is provided. To generate the Master Index Card:

1. From a patient's Manage Patient screen or Manage Immunizations screen, click the **Reports** button.
2. At the Reports Available for this Patient section, click the **Master Index Card** link.
3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.
4. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
5. To return to the Patient Reports screen, close the Acrobat Reader® by clicking the X button in the upper right corner of the Master Index Card Report window.

Iowa Department of Public Health
Master Index Card

Patient's Name: TEST, PATIENT
SSN: _____
Date of Birth: 01/01/2010   Gender: F

Parent/Guardian: TEST, MOM
Home Phone: (515) 111-1111
Birth State/Country: IA / UNITED STATES

Address: 321 E 12TH ST, DES MOINES , IA 50321
Cell Phone: (515) 222-2222
Mother's Maiden Name: DOE

E-mail: TESTPATIENT@EMAIL.COM
Medicaid #: _____

Ethnicity: ☐ Hispanic or Latino   ☐ Not Hispanic or Latino
Race: ☐ American Indian/Alaska Native ☐ Asian ☐ Black ☐ Native Hawaiian or Other Pacific Islander ☐ White   Physician: _____
Medical Notes/Allergies: _____

This child qualifies for the VFC program because he/she is (select only one): ☐ M-Medicaid Enrolled   ☐ NI-Has No Insurance   ☐ AI/AN-Am. Ind/AK Native   ☐ UI - Underinsured
*I have read and understand the appropriate Vaccine Information Statement(s). I have had a chance to ask questions which were answered to my satisfaction. I understand the benefits and risks of the vaccine(s).

Vaccine	Date Given	Client / Parent / Guardian Signature*	Health Care Provider	Dosage / Route / Site	Manufacturer / Lot #	VIS Date
Diphtheria, Tetanus, Pertussis DTaP/Tdap/DTP/DT/Td						
DTaP, NOS	03/01/2010		Iowa Training Org		DF345	
DTaP, NOS	05/01/2010		Iowa Training Org		DF345	
DTaP, NOS	07/01/2010		Iowa Training Org		JD797	
DTaP, NOS	01/01/2011		Iowa Training Org		54TEF	
Polio IPV/OPV						
Polio, NOS	07/01/2010		L1100-1			
Measles, Mumps, Rubella MMR						
MMR	01/01/2011		Iowa Training Org		M007412	
Haemophilus influenzae type b Hib						
Hib, NOS	03/01/2010		Iowa Training Org		UI760AAA	
Hib, NOS	05/01/2010		Iowa Training Org		UI760AAA	
Hib, NOS	07/01/2010		Iowa Training Org			
Hepatitis B						
HepB, NOS	01/01/2010		Iowa Training Org			
HepB, NOS	03/01/2010		Iowa Training Org			
HepB, NOS	07/01/2010		Iowa Training Org			

06/02/2017   Page 1 of 2   Revision date: 01/2017

Patient Reminder Letter

The Patient Reminder Letter link will print an individual patient's reminder letter, which includes the patient vaccination record and the recommended vaccines to be received. This report generates in PDF format, which can be printed for the patient. The reminder letter can be printed in English or Spanish.

1. From a patient's Manage Patient screen or Manage Immunizations screen, click the **Reports** button.
2. At the Reports Available for this Patient section, click the **Patient Reminder Letter** link.
3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.
4. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
5. To return to the Patient Reports screen, close the Acrobat Reader® by clicking the X button in the upper right corner of the Patient Reminder Letter Report window.

Dear Parent/Guardian of Patient Test,

Our records indicate that Patient Test has received the following immunizations:

Immunization Record		Tracking Schedule: ACIP
Immunization	Date Administered	Series
DTP/aP	03/01/2010	1 of 5
	05/01/2010	2 of 5
	07/01/2010	3 of 5
	01/01/2011	4 of 5
HepA	01/01/2011	1 of 2
	07/01/2011	2 of 2
HepB	01/01/2010	1 of 3
	03/01/2010	2 of 3
	07/01/2010	3 of 3
Hib	03/01/2010	1 of 4
	05/01/2010	2 of 4
	07/01/2010	3 of 4
Influenza-seasnl	06/08/2016	
MMR	01/01/2011	1 of 2
PneumoConjugate	03/01/2010	1 of 4
	05/01/2010	2 of 4
	07/01/2010	3 of 4
Polio	07/01/2010	1 of 4
Varicella	01/01/2011	1 of 2

Our records also show that Patient may be due for the following immunizations. If Patient received these or other immunizations from another health care provider, please call our office so we can update Patient's record. Otherwise, please take Patient to a health care provider to receive them.

Immunizations Due
Polio-Inject
MMR
Varicella
Influenza
Tdap

XVI.   Organization Level Reports

These are specific reports to assist the organization with viewing the information regarding patients and immunizations in multiple ways.

Reminder/Recall

From the Reports menu option, reminder and recall notices can be generated, which include letters, mailing labels, reminder cards and patient listings. To run a reminder/recall report in IRIS:

1. Click the '**reminder/recall**' link found in the Reports section of the menu panel in IRIS.
2. The Reminder/Recall request screen will display two options. The first option allows the user to create a new Reminder/Recall request criteria, name, and save the list for later use. The second option allows providers to use a Reminder/Recall request criteria previously generated. Select either option.
3. Select 'Use Tracking Schedule Selected for All Patients' radio button under the Indicate the tracking schedule section, and select ACIP from the dropdown menu.
4. The reminder/recall report can be run for all or specific vaccines.
    a. If running the report for all vaccines, select 'Use All Vaccine Groups'.
    b. If running the report for specific vaccines, select 'Use Vaccine Groups Selected'. Scroll through the list and either select the vaccine(s) to run the report for and click 'Add', or double click the vaccine, which will move it to the right-hand box.
5. The report can be run for vaccines due now, vaccines past due or both. The most inclusive option would be to select 'Both' to run the report for vaccines due now and past due.

6. The next section allows data to be filtered to show patients who are due or past due for vaccines by school, primary care physician, city, zip code or county. These fields can be left blank.
7. The 'Enter the Date Criteria' section allows users to filter by a specific immunization due date or by birth date. The best option would be to run by a specific birth date range which can be broken down by

pediatric patients, adolescents or adults. The From field contains the oldest birth date being returned and the To field is the youngest birth date being returned.

    a. For example, to run a report for all two year olds as of January 26th, 2016, the From field would be 01/26/2013 and the To field should contain 01/26/2014.

8. Next, complete the 'Select the Vaccine Groups to Display'. Usually this should match the option selected above.

    a. If running the report for all vaccines, select 'Use All Vaccine Groups'.

    b. If running the report for specific vaccines, select 'Use Vaccine Groups Selected'. Scroll through the list and either select the vaccine(s) to run the report for and click 'Add' or double click the vaccine which will move it the right-hand box.

9. Select 'Save & Generate' to generate the report and save the criteria for later use.

Note: Reminder and recall notices can be generated for each patient, if the following conditions are met:

- The status is Active in the Patient Information Section for the 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 Request Status screen

Generating Reminder Recall can take a few minutes to return results. While the data is being generated, the Reminder Request Status screen indicates the percentage of completion. Periodically click Refresh to update the status.

■■■■■■□

Note: It is not necessary to stay on the Reminder Request Status screen while the report is being created. Navigate anywhere in IRIS while the report is generating, and return to the status screen by clicking the Check Reminder Status link under Reports on the menu panel. Users can close out of IRIS and return to the status screen by clicking the Check Reminder Status link after logging in again.

■■■■■□□

Summary Screen

When the report is complete, click the blue date link to go to the Reminder Request Process Summary screen. The Summary screen lists the number of patients involved in the search and the criteria used to define the search. From the Summary screen, various reminder output options can be created.

Reminder Request Process Summary

Reminder Request Criteria Name:

Step	Criteria Evaluated at this Step	Patients
1	Patients **associated** with *IR Physicians*.	39
2	Patients **immunized** by *IR Physicians*.	30
3	Patients that are **active** within *IR Physicians* and **allow Reminder & Recall Contact**. Additional criteria includes: • Patients **born between 01/01/2007 and 01/01/2010**; • **County** is not specified; • **School** is not specified; • **Provider** is not specified;	17
4	Patients that have a **Valid Address**. Additional criteria includes: • **City** is not specified • **Zip Code** is not specified.	10
5	Patients that meet the following criteria regarding vaccination status: • Patients that are **Due Now** for one or more vaccinations **on or before** ; • Use all **vaccine groups**; • Use **tracking schedule** associated with each patient..	5
	Total Number of Patients Eligible for Reminder	5

Last Notice Date Options

On the bottom of the Reminder Request Process Summary screen, users have the option of resetting the last notice date, which will affect future reminder/recall notices generated using this information. Options on the last notice date table include the following:

1. **Preview Patients** provides a list of patients included in the Reminder Recall Report. This information is presented on the screen and includes a link to each patient's demographic record.
2. **Increment Eligible** resets the last notice date for all patients eligible for this reminder. The last notice date is viewable on the patient's demographic record under the organization information section.
3. **Increment Immunized** sets the last notice date for all patients that met the criteria for the report and who were immunized by the organization.
4. **Cancel** returns to the Reminder Request Status screen.

Reminder/Recall Output Options

The Reminder Request Output Options table, found on the Reminder Request Process Summary screen, offers multiple options to use the data from the query.

Reminder Letters

The reminder letter output option generates a standard form letter for the parent/guardian for each patient returned. The letter allows room at the top for the 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:

1. Under the Additional Input column or the Letter section of the table:
   a. Report Name: Enter a report name, or if left blank, the report will be named Reminder Letter on the Reminder Report Status screen.
   b. Free Text: Users may include a maximum of 400 characters in this field. Any information entered in this text box will be included as the closing for each reminder letter generated.
   c. Phone #: The telephone number will be included as the closing for each reminder letter generated.
2. Click **Reminder Letter** link.
3. Reminder Letters 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.
4. To check the progress, click Check Reminder Status under Reports on the menu panel.
5. Once the status displays as Ready and the report name becomes a link, the letters are ready to view. Click the report name to view or print the letters in Adobe Reader®.

6. To print the letters, click the printer icon on the Adobe® toolbar. Click **OK** in the Print dialog box.
7. *To print additional output, click the Back button on the browser. At the Reminder Request Status screen, click the Reminder Request link to return to the Reminder Request Process Summary screen.*

Reminder Card

The Reminder Card output option generates a standard reminder card for the parent/guardian for each patient returned. The output will generate four postcards per page. Reminder cards do not display specific immunization(s) needed. IRIS reminder postcards are available at no cost to Iowa health care providers and can be ordered on the IDPH Immunization Program, Forms and Downloads page. To generate Reminder Cards:

1. Under the Additional Input column or the Letter section of the table:
   a. Report Name: Enter a report name, or if left blank, the report will be named Reminder Cards on the Reminder Report Status screen
   b. Phone #: phone number and organization name are printed for each of the cards generated.
2. Click **Reminder Cards** link.
3. Reminder Cards will be listed on the Reminder Output Status. The bottom table shows the name of the request, the date and time it was started and the status of the request.
4. Once the status displays as Ready and the report name becomes a link, the reminder cards are ready to view. Click the report name to view or print the cards in Adobe Reader®.

Mailing Labels

The Mailing Labels output option produces 30 labels per page on Avery Mailing Labels #5160. To generate mailing labels:

1. Click **Mailing Labels** link.
2. Click **Refresh** periodically to check the status. Once the report name becomes a clickable link, the labels are ready. Click the report name to view or print the labels in Adobe Reader®.
3. To print the labels, click the printer icon on the Adobe® toolbar. Click **OK** in the Print dialog box.
4. To print additional output, click the Back button on the browser. At the Reminder Request Status screen, click the Reminder Request link (top table) to return to the Reminder Request Process Summary screen.

Patient Query Listing

The Patient Query Listing displays a listing for each patient on the report, which includes the patient's name, phone number, address, what immunizations are due, and if the patient was immunized previously, previous immunization dates will also be included.

KYLER K ZEHNER - 01/01/2000			321 FAKE ST.	DES MOINES, IA 50321
				Tracking Schedule: ACIP
Vaccine	**Immunizations Due**	**Immunization Dates**		
HPV	01/01/2011			

SAM K ZEHNER - 01/01/2001			321 FAKE ST.	DES MOINES, IA 50321
				Tracking Schedule: ACIP
Vaccine	**Immunizations Due**	**Immunization Dates**		
HPV	01/01/2012			

1. Click the **Patient Query Listing** link.
2. Patient Query 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.
3. To check the progress of the request, click the **Refresh** button on Check Reminder Status under Reports on the menu panel.
4. Once the report name becomes a link, click the report name to view or print the report in Adobe Reader®.
5. To print the report, click the printer icon on the Adobe® toolbar. Click **OK** in the Print dialog box.
6. To print additional output, click the Back button on the browser. At the Reminder Request Status screen, click the Reminder Request link (top table) to return to the Reminder Request Process Summary screen.

Extract Client Data

The Extract Client Data displays patient demographic information, immunization history, and recommendations for those patients identified as being due/overdue in the Reminder/Recall output in XML format. This report lists every patient returned in the report query process. To extract client data in XML format:

1. Click the **Extract Client Data** link.
2. Client XLS 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.

Reminder Request Status

Started	Completed	Status	Patients	Target From	Target To
08/01/2011 05:58 AM	08/01/2011 06:01 AM	100 %	10	08/01/2011	08/01/2011
07/29/2011 07:11 AM	07/29/2011 07:12 AM	100 %	10	07/29/2011	07/29/2011
07/29/2011 07:06 AM	07/29/2011 07:07 AM	100 %	2	07/29/2011	07/29/2011
07/29/2011 07:06 AM	07/29/2011 07:07 AM	100 %	2		

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
Client XML	Client XML	08/01/2011 06:24 AM	08/01/2011 06:24 AM	08/01/2011 06:24 AM	Ready
Reminder Letter	Reminder Letter	08/01/2011 06:01 AM	08/01/2011 06:01 AM	08/01/2011 06:01 AM	Ready

Creating Custom Letters

IRIS allows users to create and store up to three custom letters to be used for reminder/recall. To create a new custom letter:

1. Click **Manage Custom Letters** under Reports on the menu panel.

Manage custom letters

Long Test Nov 18 2010	Delete
Long Test Oct 29 2010	Delete
New Custom Letter	

2. Click the **New Custom Letter** link.
3. At the Create New Custom Letter screen, enter the following:
    a. Top Margin: Choose the number of blank lines for the top of the letter from the dropdown list provided. These blank spaces will leave room to print the letters on letterhead.
    b. Include Patient Address:
        i. Check the box to include the patient's address at the top of the letter.
    c. To include a name with the patient address, choose from the dropdown list one of the following:
        i. (no name) - default
        i. Patient name
        ii. To the parent/guardian of patient name
    b. Salutation: Enter a greeting, and then choose a name option from the dropdown list provided.
        i. If name is chosen, the name of the patient will appear after the salutation.
        ii. If responsible person is chosen, the letter will read <salutation> Parent/Guardian of <patient name>
4. Paragraph 1:

a. In the field marked First Part, enter desired text.
b. If no name will be included, enter all of the first paragraph text in the field marked First Part and select no name from the name dropdown list.
c. To include a name within the paragraph, enter text up to the name ending with a single space. Next, choose the name to appear within the paragraph from the dropdown list (either parent/guardian, patient name or no name).
d. In the field marked Second Part, continue to enter the rest of the text.
e. Immunization History: Check the box to include the patient's immunization history in the letter.
f. The maximum amount of allowed characters in this field is 4,000.

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

a. Immunization recommendations: Check this box to include the immunization forecast for the patient in the letter.
b. The maximum amount of allowed characters in this field is 4,000.

6. Paragraph 3: Enter text in this field, if desired.

a. Closing: Enter a closing word or statement in this field. To include the organization's name and/or telephone number after the closing, check the appropriate boxes.
b. Name and Save the Custom Letter: Enter a name for the letter in the field provided. When the letter is complete, click Save.
c. The maximum amount of allowed characters in this field is 4,000.

Top Margin
Number of blank lines at the top of the letter: 3 ▼

Patient Address
☐ Include patient address

Salutation
Enter a salutation for the letter: [_____]

Include a name at the end of the salutation: (no name) ▼

Paragraph 1
First Part

[_____]

Include a name between the first and second parts of this paragraph: (no name) ▼

Second Part

[_____]

Immunization History
☐ Include immunization history

Paragraph 2

[_____]

Immunization Recommendations
☐ Include immunization recommendations

Paragraph 3

[_____]

Closing
Enter a closing for the letter: [_____]

☐ Include provider organization name in the closing
☐ Include provider organization phone number in the closing

Name and save the custom letter
Name the custom letter [_____]

[Save]   [Cancel]

Note: After saving the custom letter, click check reminder status in the left hand menu bar. Then select the desired reminder report to generate the custom letter.

Generating Custom Letters

The custom letter output option generates a customized letter for each patient returned on the 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:

1. Each time custom letters are generated, give the report a unique name. Report names should be different from the custom letter name. Name the report prior to clicking the custom letter link.
2. Click the link with the name of the custom letter. The letter will begin generating immediately.

Patient Query Listing	A list of patients based on the report criteria.	Report Name	
Extract Client Data	Extract client data in XML format.	Report Name	
Long Test Nov 18 2010	Custom Letter.	Report Name	
Long Test Oct 29 2010	Custom Letter.	Report Name	

3. The custom letter 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.
    a. Click Refresh occasionally to check the status.
    b. Users can navigate away from the custom letters while the letters are processing. To return to check the progress, click Check Reminder Status under Reports on the menu panel.
4. Once the report name becomes a link, the custom letters are ready. Click the report name to view or print the letters in Adobe Reader®.
5. To print the letters, click the printer icon on the Adobe® toolbar. Click OK in the Print dialog box.
6. To print additional output, click the back button on the browser. At the Reminder Request Status screen, click the reminder request link (top table) to return to the Reminder Request Process Summary screen.

Doses Administered Report

The Doses Administered Report will give information on how many doses of each vaccine have been given, by age, within a specified date range. This report includes administered immunization records from IRIS Inventory. Historical immunizations are not included.

Doses Administered Report from IRIS Inventory

Vaccination Period 01/01/2012 To 03/31/2012

Report Run on: 03/31/2012

Site: IR Physicians

Group Name	Trade Name	VFC	<1 yr	1 yr	2 yrs	3-5 yrs	6 yrs	7-10 yrs	11-12 yrs	13-18 yrs	19-24 yrs	25-44 yrs	45-64 yrs	65+ yrs	Total
Td/Tdap	Td	Yes	0	0	0	0	0	0	1	1	0	1	0	0	3
Td/Tdap	DECAVAC	Yes	0	0	0	0	0	0	0	0	0	0	2	0	2

To generate a Doses Administered report:

1. Click the **Doses Administered** menu item under the Inventory section of the menu panel.
2. At the Doses Administered Report Criteria page, choose the organization from the Site dropdown list.
3. In the "From" field under Report Date Range, choose a starting and ending date using the MM/DD/YYYY format.
4. Click the Generate Report button.
5. The report displays in Adobe Acrobat Reader®. Click the printer icon on the Adobe® toolbar to print the report.
6. Click **OK** in the Print dialog box.

7.   Click the browser's Back button to return to the Doses Administered Report criteria.

Benchmark Reports

The benchmark report allows IRIS 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 IRIS, exported as a text file, or exported as a spreadsheet.

Benchmark Report Status			Refresh	Cancel
Report Type	**Started**	**Completed**	**Status**	**Row Count**
BENCHMARK	05/16/2017 09:09 AM	05/16/2017 09:09 AM	DONE	0

Benchmark Report Results

What would you like to do with this report?

Export as Text   Export as a Spreadsheet

Report 19190

Iowa Immunization Registry Information System
Report generated on 05/16/2017
Report generated by Joseph Zehner
Iowa Training Org - ITO - Z77000

Filter conditions used for this report:

Patients Associated with Site: Iowa Training Org
Both patients who DID or did NOT meet the selected benchmark(s)
Just consider immunizations as meeting the benchmark
Patients of gender: Any Gender
Birth date between 01/01/2012 and 01/02/2012
Evaluation date: 05/16/2017
Benchmark age @ 24 months
Selected benchmarks: DTaP (4), HepB (3), Hib (3), MMR (1), Polio (3), Pneumo (4), Varicella (1)
Total patients: 0; 0 patients (0%) met all benchmark criteria, 0 patients did not

To generate a Benchmark report:
1.   Click **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:
     a.   Patients Associated with Selected Site. Selecting this option and picking the provider organization's name from the dropdown will bring back all patients who are active and who have been immunized by the provider organization.
     b.   All Patients Associated with <Organization Name>: This will bring back all patients who are active for the provider organization.
3.   Click one of the following to specify the patients to return on the report:
     a.   Patients who did NOT meet the benchmark: a list of patients who did not meet the benchmark(s) selected.
     b.   Patients who DID meet the benchmark: a list of patients who met the benchmark(s) selected.
     c.   All patients, regardless of whether they met the benchmark or not: a list of all patients meeting the benchmarks selected.
4.   Select the age, birth date range, or age range of the patients by choosing one of the following.
     a.   Less than or equal to 72 months old (or Adolescent Benchmarks): Selecting this option will bring back all patients who are 72 months old or younger as of the evaluation date or adolescents between the ages of 13-15 years old as of the evaluation date.
     b.   Birth date range: Enter the earliest birth date in the first field and the latest birth date in the second field to include on the report, or use the calendar icons beside each field to enter the dates. The oldest birth date allowed are patients who are 6 years of age or younger as of the date the report is run.

c. Age range: In the Youngest Age field, use the dropdown list next to it to choose days, months, or years. In the Oldest Age field, enter an age and use the dropdown list to choose days, months, or years. The oldest age allowed are patients who are 6 years of age or younger as of the date the report is run.

   i. If running an adult benchmark report, select the Adult radio button and IRIS will allow an age range of patients who are 18+ years of age.

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.

██ ██ ██ ██ ██ ░░ ░░

Note: Refusals of Vaccine
In order for patient refusals of vaccine to be calculated correctly on assessment and benchmark reports, a Start Date must be entered for refusal comments on the Patient Comments tab. Refer to the Managing Patients Chapter 10 of this manual for more information.

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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:

8. 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 on the box with 4 in it where DTaP and @ 19 months intersect will result in a report with this benchmark included.

9. To select all benchmarks in a row, click the first box in the row that indicates @ X months.

10. To select benchmarks in a predefined series, select one of the 431, 43133, or 431331, or 4313314 combinations at the bottom of the table.

11. Click the **Generate** button.

Select Evaluation Date

05/16/2017 🖩

Select Benchmark

Age Specific Immunization Benchmarks							
Age	DTaP	Hep B	Hib	MMR	Polio	Pneumo	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	4	3	3	1	3	3	1
@ 19 months	4	3	3	1	3	3	1
@ 21 months	4	3	3	1	3	3	1
@ 24 months	4	3	3	1	3	4	1
@ 72 months	5	3	4	2	4	4	1
Or select one of these aggregate outcomes:							
@ 24 months			431	43133	431331	4313314	
@ 36 months			431	43133	431331	4313314	
Adolescent Benchmarks							
	TdaP/Td	Hep B	MMR	Varicella	Meningo	HPV	
@ 13-15 yrs	1	3	2	2	1	3	
Adult Benchmarks							
	TdaP/Td	MMR	Varicella	HPV	PPV 23	Zoster	
@ 18+	1	1	2	3	1	1	
Influenza							

Clear Selection

Generate   Cancel

12. The Benchmark Report Status screen will display. Click Refresh occasionally to check the progress of the report. When the report is ready, click the Benchmark link.

Benchmark Report Status   Refresh   Cancel

Report Type	Started	Completed	Status	Row Count
BENCHMARK	05/16/2017 11:07 AM	05/16/2017 11:07 AM	DONE	29

13. IRIS will display the Benchmark report at the bottom of the Benchmark Report Status screen. Results can be exported as a text file or excel spreadsheet. The Benchmark Report shows a list of all patients who met the filter criteria specified. The report provides a count and percent of how many patients met the specified criteria. It lists patients by first and last name, date of birth, phone number, and address. The Y or N in the columns after each patient's demographic information indicates whether the patient met the criteria for that vaccine and benchmark age.

Filter conditions used for this report:

Patients Associated with Provider: Iowa Training Org

Both patients who DID or did NOT meet the selected benchmark(s)

Just consider immunizations as meeting the benchmark

Patients of gender: Any Gender

Birth date between 01/01/2013 and 01/01/2014

Evaluation date: 06/22/2017

Benchmark age @ 24 months

Selected benchmarks: DTaP (4), HepB (3), Hib (3), MMR (1), Polio (3), Pneumo (4), Varicella (1)

Total patients: 10; 0 patients (0%) met all benchmark criteria, 10 patients did not

Report 19311; Results 1 - 10 of 10

No	First Name	Last Name	Birth Date	Primary Phone Number	Street	City	State	Zipcode	DTaP (4)	HepB (3)	Hib (3)	MMR (1)	Polio (3)	Pneumo (4)	Varicella (1)
1	REMINDER	TEST	01/01/2014		312 E. 12TH ST.	DES MOINES	IA	50220-1306	N	N	N	N	N	N	N

Group Patients Report

The group patients report allows users to see patient's immunization history reports for all patients within a specific birth date range, immunizations given by a specific provider organization, and/or all patients who received immunizations within a specific date range. To run a group patient report:

1. Click **Group Patients** under the Reports section of the menu panel.

2. To run a report for patients in a specific birth date range, click the check box on the first line. Enter a from birth date and to birth date in MM/DD/YYYY format.
3. To run a report for patients who have immunizations administered by this organization, click the check box on the second line. Choose a provider organization from the dropdown list. By selecting this option, this limits the report to immunizations administered at the provider organization.
4. To run a report for patients who have an immunization in a specific date range, click the check box on the third line. Enter a from and to date in MM/DD/YYYY format.

   Note: Combine any of the criteria in the above steps. The system only selects patients who fulfill all the criteria specified.

5. Choose a sort order and sort by Last Name then Age or by Age, then Last Name.
6. When criteria are completed, click the **Generate** button.
7. Click the **Refresh** button to update the status of the report. The system starts to generate the report and

returns to the Group Patient Reports Request Status screen.

8. After the report finishes generating, the top line on the Group Patient Reports Request Status screen becomes a link. Click the link to go to results page.

Group Patient Reports Request Status				Refresh
Report Name	Started	Completed	Status	Patients
Immunization_History_Report	2010-09-16 05:55:59.0	2010-09-16 05:55:59.0	100%	3
Immunization_History_Report	2010-09-23 13:03:19.0	2010-09-23 13:03:24.0	100%	5

9. The system displays the report in a PDF. To print the report, click the printer icon on the Adobe toolbar.

Assessment Reports

<div align="center">

IRIS Assessment Summary

All Patients from: IR Physicians

Evaluation Date: 04/15/2012   **Date Report Was Run:** 04/15/2012

Age Group	Records Analyzed	Inactive	Records Meeting Criteria
36 -72 Months of Age	49	2	47
24 - 35 Months of Age	41	0	41
12 -23 Months of Age	25	1	24
< 12 Months of Age	8	1	7
Total	123	4	119

</div>

The Assessment Report feature in IRIS provides an analysis of an organization's immunization coverage rates. The following is a brief overview of the data that are returned on each table within the Assessment Report. Routinely reviewing patient records and assessing vaccination coverage rates are proven strategies to improve vaccination coverage.

1. Click **Assessment Report** under the Reports section of the menu panel.
2. Select the patient population to be assessed by clicking on one of the following:
   a. Patients Associated with Selected Site. Selecting this option and picking the provider organization's name from the dropdown will bring back all patients who are active and who have been immunized by the provider organization.
   b. All Patients Associated with <Organization Name>: This will bring back all patients who are active for the provider organization.
3. Select the age, birth date range, or age range of the patients by choosing one of the following.
   a. Less than or equal to 72 months old (or Adolescent Benchmarks): Selecting this option will bring back all patients who are 72 months old or younger as of the evaluation date or adolescents between the ages of 13-15 years old as of the evaluation date.
   b. Birth date range: 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. The oldest birth date allowed are patients who are 6 years of age or younger as of the date the report is run.
   c. Age range: In the Youngest Age field, use the dropdown list next to it to choose days, months, or years. In the Oldest Age field, enter an age and use the dropdown list to choose days, months, or

years. The oldest age allowed are patients who are 6 years of age or younger as of the date the report is run.

   i. If running an adult benchmark report, select the Adult radio button and IRIS will allow an age range of patients who are 18+ years of age.

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 assessment criteria date will be included in the report.

6. Click **Generate**.

7. The Assessment Report Status screen will display. Click **Refresh** occasionally to check the progress of the reports. When the reports are ready, the job name will appear as a link, and the status will display as Complete. Once reports are complete, view the available reports by clicking on the link for the desired report.

Assessment Report Status		Refresh
		Cancel

Assessment of Patients With At Least One Missing Age Specific Benchmark

3 Months ▾   Generate

Assessment Report Output Options

Job Name - Evaluation Date	Started	Status
(Benchmark Patient Listing) Iowa Training Org - 5 Months - 04/07/2017	04/07/2017 11:08 AM	COMPLETE
(Assessment Report) Iowa Training Org - 04/07/2017	04/07/2017 10:07 AM	COMPLETE
(Missed Opps Patients) Iowa Training Org - 04/07/2017	04/07/2017 10:07 AM	COMPLETE

Records Meeting Criteria

Age Range - Evaluation Date	Number of Patients in Age Range	Started	Status
< 12 Months of Age - 04/07/2017	0	04/07/2017 10:07 AM	COMPLETE
12 - 23 Months of Age - 04/07/2017	0	04/07/2017 10:07 AM	COMPLETE
24 - 35 Months of Age - 04/07/2017	0	04/07/2017 10:07 AM	COMPLETE
36 - 72 Months of Age - 04/07/2017	4	04/07/2017 10:07 AM	COMPLETE
All Age Ranges - 04/07/2017	4	04/07/2017 10:07 AM	COMPLETE

8. Run an assessment of patients with at least one missing age-specific benchmark by selecting an age from the dropdown list and click **Generate**. 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.
   a. Click the job name link.
   b. The report listing patients by benchmark age will have a job name of: (Benchmark Patient Listing) <Organization Name> - <Benchmark Age>.
9. The assessment report will be called: (Assessment Report)<Organization Name> - <Date>.
10. A report listing all patients who have missed a vaccination opportunity will have a job name of: (Missed Opps Patients)<Organization Name>-<Date>.
11. Click an 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 the All Age Ranges link.
12. The report displays in Adobe Reader®. To print one of the reports, click the printer icon on the Adobe® toolbar.
13. Click **OK** in the Print Dialog box
14. To return to the Assessment Report Status screen, click the Back button in the browser.

Note: 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.

Vaccine Eligibility

The Vaccines Eligibility report details the number of patients vaccinated by the organization for each Vaccine Eligibility type for a specified date range by either age group or vaccine group.

To generate a Vaccine Eligibility report:

1. Click **Vaccine Eligibility** under the Reports section of the menu panel.
2. Select the organization name from the drop-down list.
3. Enter a From date in the date range field using the MM/DD/YYYY format.
4. Enter a To date in the date range field using the MM/DD/YYYY format.
5. Choose a type of VFC Report to run. There are two options:
   a. The Age Group report displays a summary of patients by vaccine eligibility and four specific age ranges: < 1 year of age, 1-6 years of age, 7-18 years of age and 19 years and older.
   b. The Vaccine Group report displays a summary of doses by vaccine eligibility and vaccine groups.
6. Click the **Generate Report** button.
7. The report will open. To print the report, click the printer icon on the Adobe toolbar.

Ad Hoc Reports

The Ad Hoc reports in IRIS allow users to create customized reports. Filters within the Ad Hoc reporting function help narrow a search by date, vaccine group, active relationship to an organization, vaccine funding source, and other factors. 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. Both types of Ad Hoc reports have an Export button to allow the data to be exported to an Excel spreadsheet.

Note: Patients whose information is added or changed on the day the report is run will not appear in the results until the following day. Ad Hoc reports run for all patients who are active and have been immunized by the provider organization.

Ad Hoc List Reports

To run an Ad Hoc List report:

1. Click **Ad Hoc List Report** under the Reports section of the menu panel.
2. Select the items to display on the report by double-clicking the desired items from the left column (for example, Patient Last Name) or by highlighting the item and clicking **Add**. This will copy the item to the right column and add it to the report.
3. Select the single item to have the report sorted and click the sort order (first-to-last or last-to-first).

4. Under the Item to filter on field, select an item to add as a filter using the dropdown list. For example, Birth Date Range could be used as a filter.
5. Filters in IRIS are used to narrow down information. Under Comparison, select a word from the dropdown list that best describes the type of comparison.
6. Under the Value to compare to field, select a value from the dropdown list in the left field and/or enter a date in the right field.
7. Under the Value to compare and field, select a value from the dropdown list in the left field or enter the ending date in the right field.
8. Click the **Add/Save Edit** button. Repeat steps 4-8 for each filter criterion.
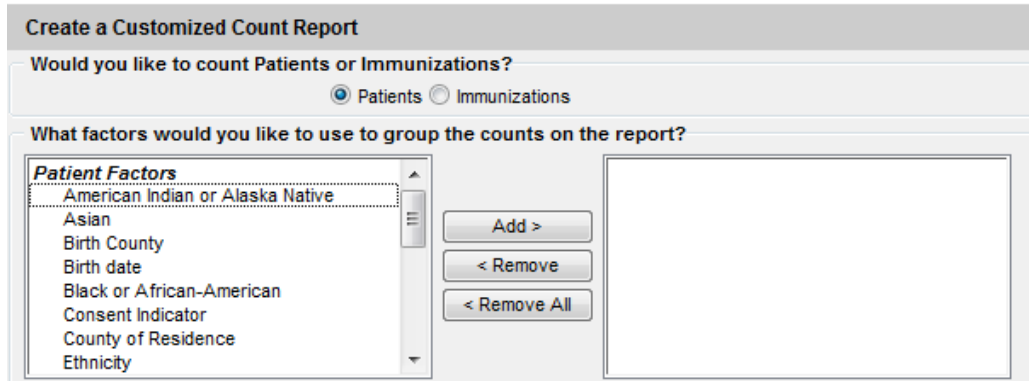

9. When finished adding filter items:
    a. Within the Selected Filters section, to change AND to OR, highlight 'AND' and click the **'And/Or'** button.
    b. Group them together by highlighting two filter statements and clicking the **Group** button. This groups the filters together in the report.
    c. Highlight a grouped statement and click the **Ungroup** button to ungroup it. This removes the filters from being grouped together in the report.
    d. Highlight a statement and click the **Remove** button to remove it from the selected filters.
    e. Highlight a statement and click the **Edit** button to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and click the **Add/Save Edit** button.
10. Click the **Generate** button. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.
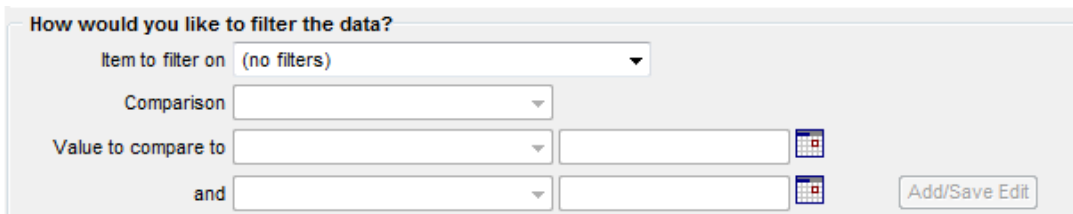
Ad Hoc Count Report

The Ad Hoc Count report allows a provider organization to produce a count of selected patients or immunizations with a variety of different fields depending on what a user selects. To run an Ad Hoc Count report:

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 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 clicking the **Add** button. This will copy the item to the right column so it can be used in the report. Choose a maximum of three factors.

4. Under the Item to filter on field, select an item to add as a filter using the dropdown list. For example, Birth Date Range could be an item used as a filter.
5. Under the Comparison field, select a word from the dropdown list that best describes the type of comparison to make. For example, 'between' is one comparison operator.
6. Under the Value to compare to field, either choose a value from the dropdown list in the left field or enter a beginning date in the right field.
7. Under the Value to compare and field, select another value from the dropdown list in the left field or enter the ending date in the right field, if applicable.

8. Click **Add/Save**. Repeat Steps 4-8 for each item to add another filter.
9. When finished adding filter items, users may do the following:
   a. Group them together by highlighting two filter statements and click Group.
   b. Change AND to OR by highlighting 'AND' and clicking the **And/Or** button. OR can also be switched to AND by following the same process.
   c. Highlight a grouped statement and click **Ungroup** to ungroup it.
   d. Highlight a statement and click **Remove** to remove it from the selected filters.
   e. Highlight a statement and click **Edit** to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and click **Add/Save.**
10. Click **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 the **Generate** button has been clicked on the Ad Hoc Count or Ad Hoc List Report screens. Or click Ad Hoc Report Status under the Reports section of the menu panel.

Ad Hoc Report Status			Refresh	Cancel
Report Type	**Started**	**Completed**	**Status**	**Row Count**
COUNT	01/11/2012 07:33 AM		PROCESSING	0
LIST	01/11/2012 07:31 AM	01/11/2012 07:31 AM	DONE	86

2. Click **Refresh** occasionally to check the status of the report. When the report is complete, it will appear as a link.

3. Click the link. The report will display on the screen.

4. At the top of the report there are links for selecting how the data is to be handled:
   o Export as Text
   o Export as Spreadsheet

5. To print the report, click **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, and then click **Print**.

■■■■□□

Note: Ad Hoc reports are retained for 72 hours per organization. IRIS will retain one count report and one list report for that period. If a new report of the same type is generated, the new report will replace the previous report.

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