An important component in an immunization provider practice is ensuring that vaccines reach individuals who need them. While appropriate vaccine administration is essential, there is no guarantee that vaccinations are being given to every person at the recommended age. Reminder/recall and immunization assessment reporting supply valuable information for an organization to improve vaccine coverage. If an organization’s patient data is not up-to-date or is incomplete, then the report information may not be correct.

Manage Patient Status allows an Immunization Reminder Information System (IRIS) user to search for patients associated with a specific organization and update the patient’s active/inactive status in IRIS. This allows for better data quality and running more accurate reminder/recall reports and immunization coverage rate reports.

The steps below provide guidance for the use of the **manage patient status** functionality in IRIS.

1. Log in to IRIS.
2. In the left-side menu in the **Patients** section select **manage patient status**.

3. The **Manage Patient Status Criteria** screen will open.
4. Select criteria below to narrow down patient lists. The fields listed in **blue** font are required.

**Select By Status:**

- **Active**: Patients are active to the organization and will appear in reminder/recall and assessment reports (default search criteria)
- **Inactive - Unspecified**: Patients are not active to the organization for an unspecified reason
- **Inactive - Lost to follow-up**: Patients are not active to the organization due to lost contact
- **Inactive - No longer a patient**: Patients are not active to the organization because they are no longer a patient

**Select By Age**: Enter by an age range, or a birthdate range.
Select By Length of Time Since Last Immunization Given by YOUR Organization: Enter a number of years, or an as of date. The patient list will show those patients who were immunized more than the entered number of years ago, based on the as of date.

Select by Last Name: Enter a specific last name or enter a range of the alphabet. At least two letters must be entered for a last name.

Once all parameters have been entered, click Find and a patient list will be generated.

While the list is being generated the screen will display “Processing...” below the Manage Patient Status Criteria. Patient lists will generate a maximum of 1,000 patients. If the criteria selected contains more than 1,000 patients, then the following message will display listing the number of patient records that meet the search criteria:

To refine the patient search criteria, consider using the last name range or reducing the age range. Depending on the original search criteria, it may take more than one search to retrieve all the data necessary to accomplish the original goal.
Manage Patient Status in IRIS

After the records are done processing, a list of patients will be displayed below the Manage Patient Status Criteria.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Birth Date</th>
<th>Patient ID</th>
<th>Current Status</th>
<th>Date of Last Immunization</th>
<th>Immunization Entered By</th>
</tr>
</thead>
<tbody>
<tr>
<td>BAKER</td>
<td>JIMMI</td>
<td>09/09/1999</td>
<td></td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BAKER</td>
<td>JOHN</td>
<td>11/11/2008</td>
<td></td>
<td>Active</td>
<td>02/21/2012</td>
<td>062 - IDA ROSE MEDICAL PRACTICE</td>
</tr>
<tr>
<td>BAKER</td>
<td>JOSEPH</td>
<td>12/20/2006</td>
<td></td>
<td>Active</td>
<td>08/09/2017</td>
<td>065 - RUBY CRESCENT PEDIATRICS</td>
</tr>
</tbody>
</table>

Tips for Evaluating Patient Status

Effectively managing patient status is one of the most powerful tools to improve data quality and immunization rates. Tips for evaluating patient status using manage patient status include the following:

1. If Date of Last Immunization and Immunization Entered By fields are blank, the patient has no immunization history entered in IRIS. This may be a clue that the patient was accidentally tied to your organization, is a new patient needing history entered, is a patient that refuses vaccines, etc.

2. If Immunization Entered By does list your organization, then the Date of Last Immunization will give the best clue as to the patient’s status. To determine whether to inactivate a patient ask the following questions:

   For children ages 2 and younger “Has the patient been seen in the past two years?”

   For children ages 3 and older, “Has the patient been seen in the past two or more years?”

   If the answer is no, the patient is likely no longer associated with your organization. If the answer is yes, then the patient likely is still associated with your organization. Check your EHR or other records to verify. Patients who attend your clinic and refuse immunizations are NOT eligible for inactivation. Inactive status is reserved for those patients who you no longer have access to.

3. If Immunization Entered By does not list your organization, then your organization may not have administered or entered any doses for that patient recently. This may be a clue that the patient is being seen by another organization, was accidentally tied to your organization, or is a new patient.
If it is determined that the patient(s) no longer attends the organization, check the box(es) on the left-hand side to select the patient(s). Click the New Status Value dropdown, select the appropriate Inactive status, and click Save.

You may select multiple patients with the same New Status Value. Patients with different changes to the New Status Value must be selected in groups of the same new status.

The patient status will be updated to the selected Inactive status, and the patient(s) will no longer be included in reminder/recall or assessment reports.

Patients can be active in multiple organizations at a time; being vaccinated at another location does not automatically inactivate a patient from your organization. In addition, inactivating a patient from an organization does not inactivate a patient in IRIS.

If a patient returns after being inactivated (i.e., moved back to town after many years), any vaccination given by your organization will automatically change their status to active. Patients will also be activated to your organization if you update and save patient demographic screen information.