

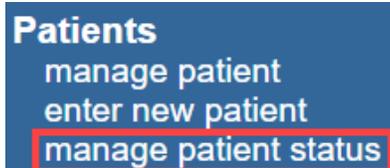
Manage Patient Status in IRIS

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

A screenshot of the 'Manage Patient Status Criteria' form. It features a 'Find' button in the top right corner. Below the title, there is a section labeled '*Select By Status' in blue text. Underneath, there are four radio button options: 'Active', 'Inactive - Unspecified', 'Inactive - Lost to follow-up', and 'Inactive - No longer a patient'. The 'Active' option is selected.

Select By Age: Enter by an age range, or a birthdate range.

A screenshot of the 'Select By Age' form. It features a section labeled '*Select By Age' in blue text. There are two radio button options: 'By Age Range' and 'Birth Date Range'. The 'By Age Range' option is selected. To the right of this option, there are input fields for 'From 11 Years' and 'To 18 Years', with dropdown arrows. Below the 'Birth Date Range' option, there are input fields for 'Earliest Birth Date' and 'Latest Birth Date', each with a calendar icon.

Manage Patient Status in IRIS

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 Length of Time Since Last Immunization Given by YOUR Organization

Years Evaluation Date  (if blank, default date is current 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.

Select By Last Name

Last Name Last Name Begin Range Last Name End Range

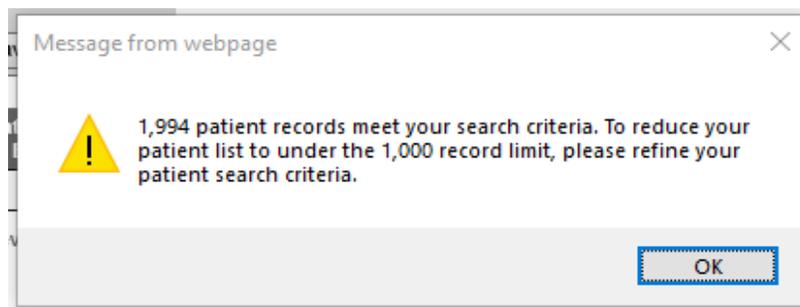
Once all parameters have been entered, click *Find* and a patient list will be generated.

Manage Patient Status Criteria

***Select By Status**

Active Inactive - Unspecified Inactive - Lost to follow-up Inactive - No longer a patient

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**.

Show 25 entries Search:

<input type="checkbox"/>	Last Name	First Name	Birth Date	Patient ID	Current Status	Date of Last Immunization	Immunization Entered By
<input type="checkbox"/>	BAKER	JIMMI	09/09/1999		Active		
<input type="checkbox"/>	BAKER	JOHN	11/11/2008		Active	02/21/2012	002 - IDA ROSE MEDICAL PRACTICE
<input type="checkbox"/>	BAKER	JOSEPH	12/28/2006		Active	08/08/2017	005 - RUBY CRESCENT PEDIATRICS

↓	↓	↓	↓	↓	↓	↓
Check to select patient	Patient list is sorted by last name, then first name	Patient birth date	Patient ID in clinic's system	Patient's current status	Date of patient's last immunization recorded in IRIS. This may not be your organization.	Organization that entered the patient's last immunization recorded in IRIS. This may not be your organization.

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 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.

Manage Patient Status in IRIS

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*.

New Status Value Save Cancel

Show 25 entries Search:

<input type="checkbox"/>	Last Name	First Name	Birth Date	Patient ID	Current Status	Date of Last Immunization	Immunization Entered By
<input checked="" type="checkbox"/>	BAKER	JIMMI	09/09/1999		Active		
<input checked="" type="checkbox"/>	BAKER	JOSEPH	12/28/2006		Active	08/08/2017	005 - RUBY CRESCENT PEDIATRICS

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.

<input type="checkbox"/>	Last Name	First Name	Birth Date	Patient ID	Current Status	Date of Last Immunization	Immunization Entered By
<input type="checkbox"/>	BAKER	JIMMI	09/09/1999		Inactive - No longer a patient		
<input type="checkbox"/>	BAKER	JOSEPH	12/28/2006		Inactive - No longer a patient	08/08/2017	005 - RUBY CRESCENT PEDIATRICS

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.