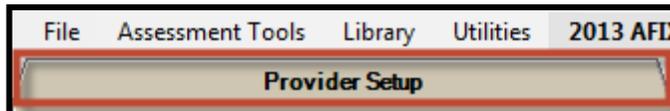


## Step Two: Importing Records from the Washington State Immunization Information System (IIS) into CoCASA

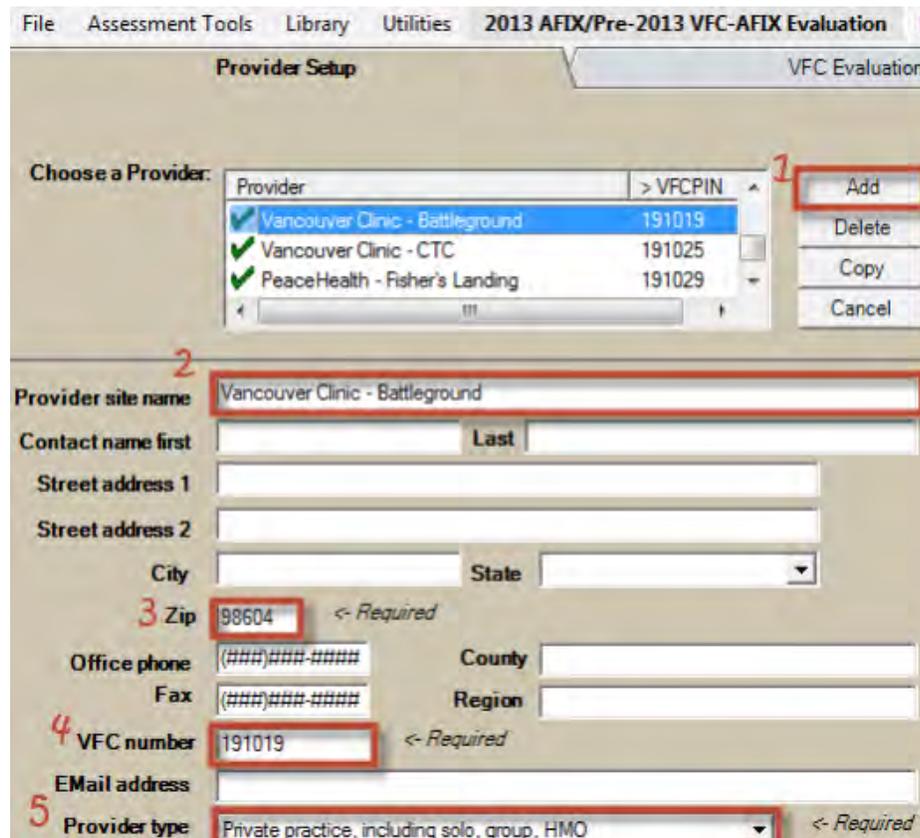
- In the [Exporting Records from the IIS](#) instructions, you installed CoCASA on your computer.
  - Find the CoCASA icon on the desktop of your computer.
  - Click on the icon and login to CoCASA.



- Click on the **Provider Setup** Tab.



- Once the **Provider Setup** screen opens, click the **Add** button. This allows you to add a new provider.
  - Fill in the following required fields:
    - Provider site name**
    - Zip code**
    - VFC number (this is the VFC PIN)**
    - Provider type**
  - If you already added this provider in CoCASA, then select the provider from the **Choose a Provider** box.

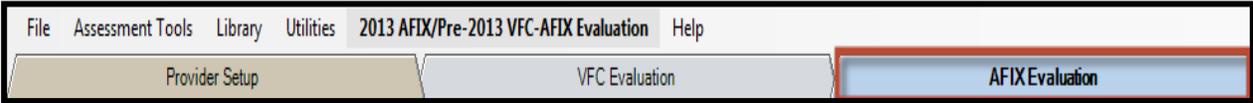


The screenshot shows the 'Provider Setup' window with the following elements highlighted:

- 1:** The 'Add' button in the 'Choose a Provider' dropdown menu.
- 2:** The 'Provider site name' text box containing 'Vancouver Clinic - Battleground'.
- 3:** The 'Zip' text box containing '98604'.
- 4:** The 'VFC number' text box containing '191019'.
- 5:** The 'Provider type' dropdown menu set to 'Private practice, including solo, group, HMO'.

Other visible fields include 'Contact name first', 'Last', 'Street address 1', 'Street address 2', 'City', 'State', 'Office phone', 'Fax', 'County', and 'Region'.

4. Click on the **AFIX Evaluation** tab.

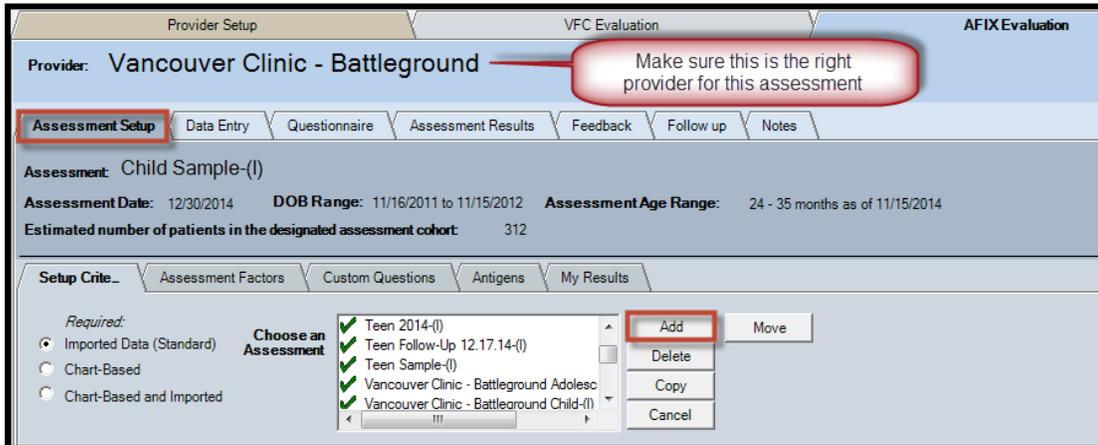


5. This takes you directly to the **Assessment Setup** screen.

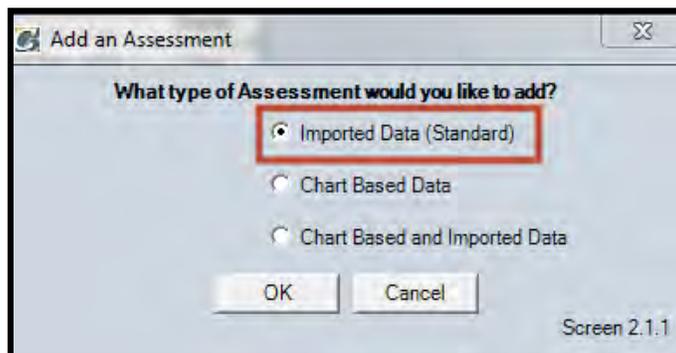
6. Check that the right provider name is listed on the top left-hand side of the **Assessment Setup** screen.

- If not, click on the **Provider Setup** tab again and choose the right provider from the **Choose a Provider** box, and then click on the **AFIX Evaluation** tab.

7. Click on the **Add** button. This lets you add a new assessment for the selected provider.



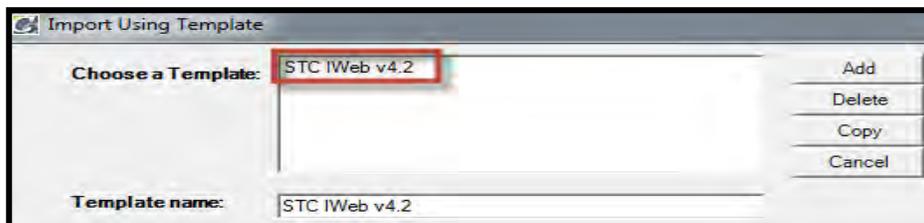
8. When you click the **Add** button, the **Add an Assessment** box opens. Click on the **Imported Data** radio button, and then click **OK**. When you click OK, the **Import Using Template** screen opens.



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9. On the **Import Using Template** screen, click on **STC IWeb v4.2** from the **Choose a Template** box. This template tells CoCASA how to read the file you exported from the IIS.

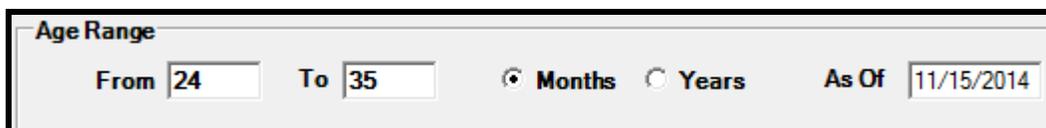
**Tip:** Delete all of the other templates, so you can only choose the **STC IWeb v4.2** template. To delete templates, select the template you want to delete and click the Delete button. When you delete all the other templates, your **Choose a Template** box will look like the screen shot below.



10. About halfway down the **Import Using Template** screen, under **Age Range**, enter:

- From: **24**
- To: **35**
- Select the **Months** radio button.
- For adolescent assessments, enter
  - From: **13**
  - To: **17**
  - Select the **Years** radio button.

11. Enter the **As Of** date. This should be the date you run the assessment. For example, if you run your assessment on 11/15/2014, type in 11/15/2014 in the **As Of** box.



11. Next to **File Name**, click on the **Browse** button.

- Find where you saved the IIS CASA Export file for this provider on your computer.
- Select the file and then click on the **Open** button. You should see some of the records start filling in the box under **File Name**.



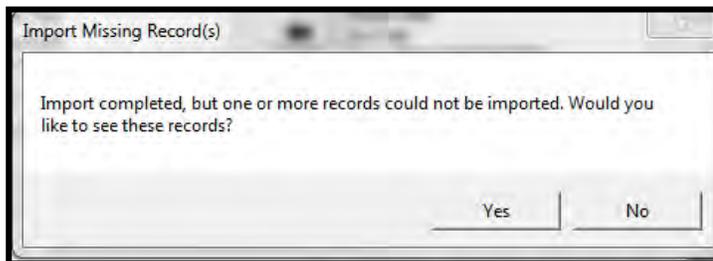
12. Toward the bottom of the screen, next to **Assessment**, type in an assessment name. It is helpful to include the age range and current year in the name of the assessment.

13. Click the **Import** button. Data will start importing into CoCASA.

**Tip:** You can tell that data is importing when the blue bar starts to move across the bottom of the screen.



14. When CoCASA finishes importing records, the following message pops up: **“Import completed, but one or more records could not be imported. Would you like to see these records?”** This log contains records that cannot be imported because CoCASA does not recognize the CPT code or there is another type of import error. Click the **Yes** button if you want to review the log or **No** if you do not.

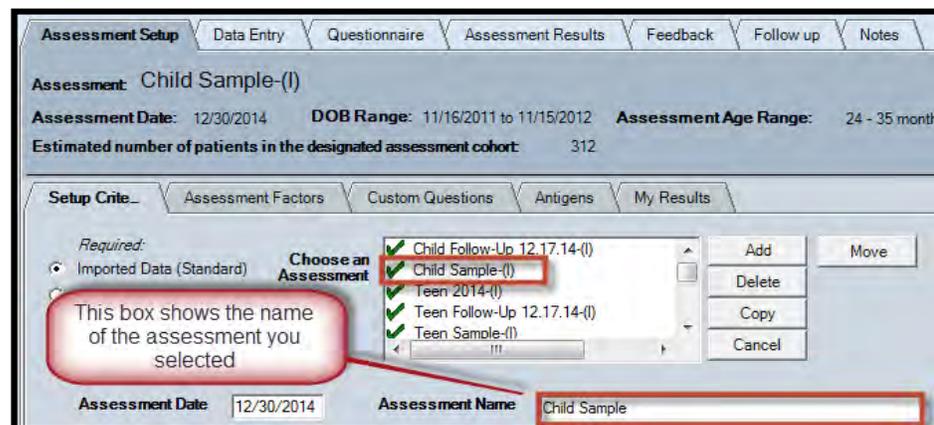


15. At the bottom of the **Import Using Template** screen, click **Close** to exit. At this point, you are done importing the IIS records and CoCASA takes you back to the **Assessment Setup** screen.

16. On the **Assessment Setup** screen, double check the following:

- If you have more than one assessment for this provider, make sure you choose the assessment you just imported.

**Tip:** CoCASA defaults to the last assessment used instead of the new assessment you added. Click on the assessment you just added from the **Choose an Assessment** box.



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17. When you add a new assessment, CoCASA automatically fills in the rest of the questions on the **Assessment Setup** screen, so you do not need to fill these in or change the answers.
18. Go to [Step Three: Running CoCASA Reports](#) for instructions on how to run the immunization reports to share with clinics during your AFIX visits.