How Can I Search for a Patient?

1. Click **Search/Add** under the **Patient** heading in the left navigation menu.
2. Enter search criteria using the tips below.
3. Click the **Search** button or press **Enter**.

Search Tips
There are several ways to search for patients, including:
- Patient’s first name, last name, and birth date.
- First initial of the patient’s first or last name and birth date.
- Patient’s first and last names without the birth date.
- **Chart Number**: You can search this way if your organization/facility sends data from your electronic health record (EHR) to the IIS.
- **Wildcard Character** (e.g. % or _): You can replace letters in the patient’s first and last names if you are unsure of the spelling or need to widen your search.

How Can I Select a Patient?

1. Click the patient’s name under **Patient Search Results** to select the patient and view their demographic information.
2. If you see two records for the same patient, click on the **Report Duplicates** button at the bottom of the screen to report them as possible duplicates. Refer to this guide for instructions.
How Can I Add a Patient to the IIS?
If your patient was born in another state or does not have a record in the system, you will need to add them to the IIS.

1. Try multiple search methods using the search tips above.
2. If no matching patient exists, check the box that says, “Check here if adding a new patient.”
3. Enter all of the required information (highlighted in red), including: First Name, Last Name, Birth Date, and Address. Guardian First Name and Mother’s Maiden Name are required for patients under 19.
4. Click the Search button.

5. After clicking the search button, a warning message in green will appear in the Patient Search Results section.
6. Click the Add Patient button.
7. After clicking Add Patient, the Patient Demographics Edit screen opens.
8. Select the patient’s Sex from the drop down box.

9. Under the Address section, click the Add button. Click OK to the pop-up message that asks if you want to mark this address as primary.
10. For patients under 19, enter the guardian’s last name in the Family & Contact section.

11. Add any additional patient demographic information (e.g. VFC Status, phone number, race, ethnicity).

**Tip:** In the School Module, you must enter a School Entry Date in the School section when adding a student.

12. Click the Save button at the bottom right of the screen.

**How Can I Edit Patient Demographics?**
1. Search for and select a patient to open the Patient Demographics screen.
2. Click the Edit button at the bottom of the screen.
3. Add or edit patient information:
   - **Patient Status:** Mark a patient as active, inactive, or deceased. The options in the drop down are more limited if your organization is not set up to own patients in the IIS.

**Tip:** Use + and − symbols to the left of each section heading to expand or collapse a section.
• **Race and Ethnicity**: Select patient race and ethnicity from the drop downs.
• **Language**: Select the patient’s primary language from the drop down.
• **Birth Order**: Select single birth or the correct number from the drop down if the patient is a twin, triplet, etc.
• **VFC Status**: For patient’s under 19, select the appropriate patient eligibility status.

4. Add, edit, or remove an address
   • Add or update address fields (e.g. address, city, zip).
   • Mark the **Primary** check box to make this the patient’s main address and click the **Add** button. Click **OK** to close the pop-up message.
   • Click the **Edit** button to modify an address. A pop up message will remind you to click the **Update** button when done editing the address. Click **OK** to close the pop-up.
   • Edit the address information and click the **Update** button.
   • Click the **Remove** button to remove a patient’s address. Click **OK** to close the pop-up message verifying that you want to delete the address.
   • Always click the **Save** button at the bottom of the screen after adding, editing, or removing information.

5. Add, Edit, or Remove a Phone Number
   • Enter the phone number and add an extension, if needed.
   • Select **Phone Use Code** and **Equipment Type** from the drop downs.
   • Select the **Primary** radio button to mark a patient’s phone number as primary.
   • Click the **Add** button.
   • Edit or remove a phone number using the **Edit** and **Remove** buttons.
   • Always click the **Save** button at the bottom of the screen after adding, editing, or removing information.
6. Add, edit or remove family & contact information
   - Enter the guardian’s first and last name. You can list more than one guardian.
   - Enter the guardian’s phone number, if needed.
   - Edit family & contact information by typing different names in the guardian fields. Remove a contact by deleting names from the guardian fields.
   - Click the Save button at the bottom of the screen after adding, editing, or removing a guardian.

7. You can also add or edit the following optional information
   - **Alias**: Enter a nickname, maiden or second last name and then click Add. The system uses this information when searching for a patient.
   - **Secondary Patient Demographics**: Document patient allergies and other household information here.
   - **School Information**: Enter the school the patient attends and their date of entry.
   - **Medical Home**: Enter the patient’s primary physician (if your clinic manages physicians/vaccinators in the IIS). You can also see your clinic’s chart number in this section if you send electronic data from your EHR to the IIS.
   - **Birth & Death**: Enter a patient’s birth location. If you mark a patient as deceased using the Patient Status drop down at the top of the Patient Demographics Edit screen, you can add a date of death in this section.
   - Click the Save button at the bottom of the screen after making edits.