

Managing Patient Ownership and Status

Why should I manage patient ownership and status?

Managing patient ownership and status improves the accuracy of reports generated from the Washington State Immunization Information System (IIS) to measure immunization rates or send reminders about due or overdue immunizations.

Patient Status			
State Level:	Active	Organization Level:	Active
County Level:	Active (King)		

*Patient Status is defined at three levels in the IIS (State, County and Organization). State and County are **automatically** updated by the IIS, see more on geographic jurisdictional status on page 4.

What is patient ownership (at an Organizational level)?

Patient ownership means a patient is associated with a specific organization and facility in the IIS. For owning organizations/facilities:

- You will “own” a patient if your facility adds a new patient in the IIS.
- You will also “own” a patient if your facility administered the most recent vaccine.
 - If you manually enter vaccines in the IIS and do not want to take ownership of a patient, you can select the **Do not take ownership** check box on the **Vaccination View/Add** screen.



Tip: Only one facility can own a patient’s IIS record at a time.

☐ Do not take ownership when adding vaccinations.

Who can own a patient in the IIS?

Most organizations and facilities who administer vaccines can own patients in the IIS. Some exceptions include schools, child care centers, pharmacies, and mobile/mass immunization providers. The ability to own patients in the IIS depends on how an organization and facility are set up in the system.



Tip: Ownership can be blocked at the organization and facility level. If an organization or facility has ownership blocked, they can’t take ownership of any patient records in the IIS. **All patients will appear as Inactive or Deceased for non-owning organizations.**

What is patient status?

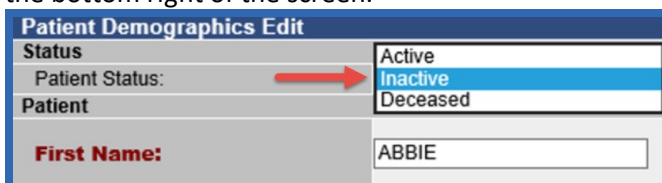
- Patient status determines whether a patient is “active” or “inactive” with a facility.
 - There are three status options in the IIS: active, inactive, and deceased.
- Patients automatically display as “active” if an owning organization/facility:
 - Creates a new patient record.
 - Documents an administered vaccine.
- Facilities need to routinely inactivate patients in the IIS in order to have accurate reports (e.g. reminder/recall).



Tip: Inactivating a patient does not change the organization owner on the **Patient Demographics** screen. It removes the patient from showing up on reports (e.g. coverage rate report, reminder/recall) when they are run for “active patients only.”

How can I change a patient’s status in the demographic screen?

1. Search for the patient in the IIS.
2. Select the patient from the **Search Results**.
3. Click the **Edit** button on the **Patient Demographics** screen.
4. In the **Patient Status** drop down box at the top of the screen, select a status, then click **Save** on the bottom right of the screen.



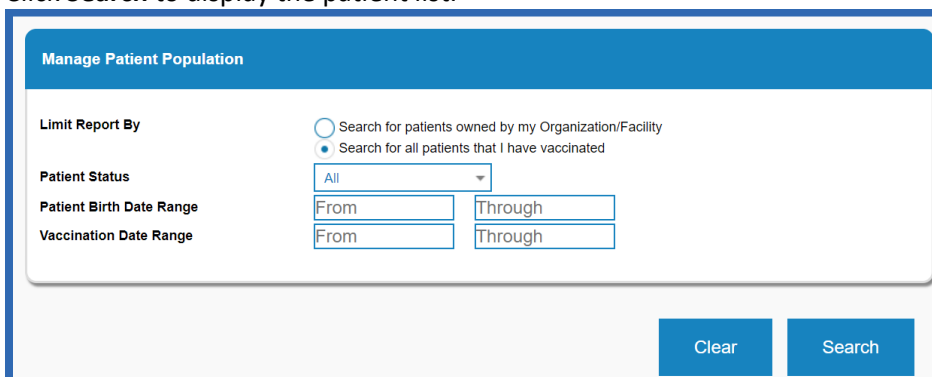
5. After saving the change, you can view the updated **Patient Status** on the **Patient Demographics** screen.



Tip: Non-owning organizations, such as schools and pharmacies, will only have Inactive and Deceased listed in the **Patient Status** drop down.

How can I manage my patient population?

1. In the left navigation menu, select **Manage Population** from under the **Patient** heading.
2. The report parameters will display at the top of the page. The options include: selecting patients owned by my organization/facility or patients that I have vaccinated. You can also limit the report by patient status, birth date range, or vaccination date range.
3. Click **Search** to display the patient list.



Under **Patient Population Results**, you can change ownership and status based upon your user account type and your organization type.

Patient Status

If your organization is set up to own patients, you can change the patient status to active, inactive, or deceased by selecting a status from the **Status** drop down.

Patient ID	Patient Name	Patient DOB	Last Vaccination Date	Owning Organization	Owning Facility	Organization Level Status
6315090	ADULT PATIENT	10/10/1990	03/15/2019	IMPROVING COVERAGE ORG	NICOLE'S VFC CLINI	Active

Patient Ownership

For facility level users, you can remove ownership by selecting **I no longer own this patient** from the **Owning Facility** drop down.

Patient ID	Patient Name	Patient DOB	Last Vaccination Date	Owning Organization	Owning Facility
6315090	ADULT PATIENT	10/10/1990	03/15/2019	IMPROVING COVERAGE ORG	NICOLE'S VFC CLINI NICOLE'S VFC CLINIC 2 I no longer own this patient

For organization level users, you can change the facility that owns the patient in the **Owning Facility** drop down (if you have multiple facilities under your organization in the IIS). You can also remove your organization as the owner of a patient using the **Owning Organization** drop down.

Patient ID	Patient Name	Patient DOB	Last Vaccination Date	Owning Organization	Owning Facility
6315090	ADULT PATIENT	10/10/1990	03/15/2019	IMPROVING COVERAGE IMPROVING COVERAGE ORG I no longer own this patient	NICOLE'S VFC CLINI



Tip: Only remove ownership if a patient is no longer seeking medical care from your organization or facility.

NEW! Geographic Jurisdiction Status at the County and State Level

Patient status is now also assessed at the geographic-jurisdiction level. This addition will improve the overall status grouping of patients in the IIS.

Inactive patients at the provider level that have an in-state address will be active with the county and state that they reside in. This will allow the public health departments to assess patient populations to ensure immunization of these populations.

Patients with an out of state address will display as inactive at the geographic jurisdiction level thus displaying a more complete picture of the in-state patient population. The geographic jurisdiction status is automatically set based upon the cases defined below.

1. **If a patient has an in-state address in the IIS**, the status would display as: Active in both State and County Level.

Patient Status	
State Level:	Active
County Level:	Active (Thurston)

2. **If a patient has an out of state address**, the status would display as: Inactive in both State and County Level.

Patient Status	
State Level:	Inactive
County Level:	Inactive

3. **If a patient has no address but a vaccination was given from in-state provider**: the patient status would display as Active State and Active County.
4. **If there is not an address recorded for patient and the vaccinating provider does not have an IIS address event**: the patient status would display as Unknown State and Unknown County.

Patient Status	
State Level:	Unknown
County Level:	Unknown

5. **Deceased Status applies to all three categories**: State, County, and Organizational.

Patient Status			
State Level:	Deceased	Organization Level:	Deceased
County Level:	Deceased		



Questions? Contact the IIS Help Desk at 1-800-325-5599 or WAIISHelpDesk@doh.wa.gov