



Managing Clients

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Manage Client vs. Manage Immunizations

Manage Client and Manage Immunizations are the same query; in other words, they both utilize the client search function. The difference is that the Manage Client query will display the Manage Client screen, which consists of the client's demographic information, responsible person(s), etc., while the Manage Immunizations query will display the client's Immunization History screen.

Because NESIIS receives birth record downloads, you should attempt to find a client in NESIIS before entering him or her as a new client. However, NESIIS will attempt to deduplicate (compare entered information against information saved to the system for duplicate clients) client records prior to saving the information on the Enter New Client screen.

Finding Clients

When searching for an existing client in NESIIS, more information is not always better. By entering too much information about a client (mother's maiden name, social security number, phone number, birth date, etc.) you will increase your entry time and decrease the odds of finding the client due to typing and interpretation errors. We recommend that you supply four characters of the client's last name and three characters of the first name only, unless the client's name is very common, in which case supplying a complete name, birth date, or mother's maiden name will help narrow the search.

1. Click on **Manage Client** under the Clients section of the menu panel.
2. In the Client Search Criteria box, you have several options for finding your client.

Client Search Criteria

Last Name Gender M F N/A

First Name SSN - -

Middle Name Phone - -

Mother's Maiden Last Chart #

Mother's First Name Registry

Birth Date



Entering Names

On all first and last names entered into NESIIS for client searches, NESIIS disregards spaces, apostrophes, and hyphens entered. This is because names in the NESIIS database do not include these characters.

- **Last Name:** Entering the first three letters of the client's last name, along with the first two letters of the first name, will initiate a search of all clients matching those letters. Entering fewer than three letters in the last name field will result in an exact name search; for example, entering the letters "Li" will produce only last names of "Li." If the client's name is common, typing in the full name will narrow the search.
- **First Name:** Entering the first two letters of the client's first name, along with the first three letters of the last name, will initiate a search of all clients matching those letters. If the client's name is common, typing in the full name will narrow the search. Refer to the margin note on p. 11.3 for information on clients with no first name.

- **Middle Name:** Entering the client's middle name (or a portion of it) in conjunction with his or her first and last name will narrow a search for a common name. Otherwise, it is not necessary to enter data in this field.
 - **Mother's Maiden Last:** Entering the mother's maiden last name, in combination with the data entered in the name fields, will narrow a search for a client with a common name. Alternately, you may find all clients associated with a mother by entering only the mother's maiden first and last names.
 - **Mother's Maiden First:** Entering the mother's first name, in combination with the data entered in the name and mother's maiden last fields, will narrow a search for a client with a common last name. Alternately, you may find all clients associated with a mother by entering only the mother's maiden first and last names.
 - **Birth Date:** Entering the client's birth date in conjunction with his or her first and last name will narrow a search for a common name. Otherwise, it is not necessary to enter a date in this field.
 - **Gender:** Indicating the gender of the client will narrow a search for a common name, especially if the first name is androgynous.
 - **SSN:** Entering the Social Security number (SSN) only will produce a single name match. Note: To find a client using his or her social security number, the number must have been entered previously for the client.
 - **Phone:** Entering the client's phone number only will produce a single name match. However, this method is not recommended, as a phone number may not be entered for a client and phone numbers may change over time.
 - **Chart #:** Entering the client's chart number only will produce a single name match. Note: To find a client using this method, the chart number must have been entered previously for the client.
 - **System:** Changing the designation in this field allows you to query another state's immunization system. Refer to the Querying Other Systems chapter of this manual for more information.
3. Press **FIND**.
 4. If multiple records are found matching the information you entered, a table listing up to 75 matches with detailed information on each will be shown below the Find Client Information box. To choose a client from this list, click on the client's last name, underlined and in blue.



Finding Clients with No First Name

To search for a client with no first name, you may:

- Search using only the last name with no other fields filled. Enter the full last name to return clients whose last name matches what is entered and who do not have a first name.
- Search using the last name and enter "No First Name" in the first name field. You may narrow the search of clients with no first name by entering other criteria, such as middle name, birth date, etc.

Possible Matches: 17

Last Name	First Name	Birth Date	Chart #	Mother's Maiden First	Mother's Maiden Last	Gender	Telephone
THOMPSON	RYAN	12/13/1974				M	
THOMPSON	RYAN	02/26/1977					

5. If only one client matches your search, the Manage Client screen for that individual will display automatically.
6. If no clients match your search, recheck the information you entered for accuracy. If you suspect the client has not been entered into NESIIS, proceed to “Editing/Entering Client Information.”

Use of Pick Lists in NESIIS

When entering information on new clients or editing client information, you will use pick lists for many fields. NESIIS uses pick lists — fields that contain a list of options from which you may choose — rather than free text fields for certain input data. The advantages of pick lists over free text fields include:

- Ease of use. Pick lists allow users to quickly fill in a data field without typing in the information.
- Health Level 7 (HL7) compliant. HL7 is a method of categorizing data so that it is uniform across all health reporting systems. This standardization allows providers using different systems to transfer data easily.
- Uniformity of entered data. By choosing information from a pick list, users do not risk entering conflicting information that could decrease the accuracy of NESIIS reports. For example, one user using a free text field might enter a county name using an abbreviation, while another user might spell out the entire name.
- Confidentiality. By using standard pick lists, NESIIS avoids confidentiality issues associated with the typing of free text that could be construed as medical record information.

Editing/Entering Client Information

The Manage Client screen allows you to update or change specific, non-immunization information relating to any client in NESIIS. The Enter New Client screen, accessed by clicking this option on the menu panel, allows you to input this information for a client new to NESIIS. The Manage Client and Enter New Client screens are divided into four parts: personal information header, client information tab, responsible person(s) tab, and client comment(s) tab.

Personal Information Header

The Personal Information section at the top of the Manage Client/Enter New Client screens contains client-specific information fields used primarily to distinguish among clients when doing client searches. All fields shown in a blue font are required. Refer to Appendix 2 of this manual for information on allowable entry characters and names for these fields.

Personal Information	
Last Name	EXAMPLE
First Name	JOHN
Middle Name	B
Suffix	JR
Mother's Maiden Last	TEST
Mother's First Name	SUE
SSN	
Gender	<input checked="" type="radio"/> M <input type="radio"/> F <input type="radio"/> Unknown
Birth Date	10/17/2005
County	DOOR
Country of Birth	UNITED STATES
Last Notice	

1. Last Name: Required field.
2. First Name: Required field. Refer to the margin note on this page for more information on clients with no first name.
3. Middle Name: Optional field.
4. Suffix: Optional field. Use the pick list to enter a suffix (e.g., Jr., Sr., M.D.).
5. Mother's Maiden Last: Required field. NESIIS will allow you to save the record without this field completed; however, it will request you gather this information for future deduplication.
6. Mother's First Name: Required field. NESIIS will allow you to save the record without this field completed; however, it will request you gather this information for future deduplication.
7. SSN: The SSN field is optional. If the field is blank, a SSN may be entered. Once the SSN is entered and saved, however, a provider cannot change it. In addition, it will not show on the Manage Client screen (it will say "On File") and will not appear on any reports. The SSN will be used for the system's public access feature. *As the SSN cannot be easily changed once it is entered, enter this information very carefully.*
8. Gender: Click the appropriate radio button to choose male or female. This field is optional.
9. Birth Date: This is a required field. Fill in the field using the MMDDYYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. Then choose a month and year from the pick lists at the top and choose a day by clicking on the appropriate calendar day. Press **OK**.



Clients with No First Name

To enter a new client with no first name, follow the steps outlined on this page, except enter the text "NO FIRST NAME" in the first name field. Save as normal. You may enter other variations of the "NO FIRST NAME" text, such as "nofirstname," "No First Name," etc.



NESIIS will not save suffixes (such as Jr., III, M.D.) that are entered into the first, last, or middle name fields. Enter suffixes in the suffix field using the pick list provided.



Social Security Numbers

If you attempt to enter a new client or edit an existing client using a SSN that is stored in NESIIS for a different client, the system will display a warning letting you know that it has not saved the SSN for the client, but that all other information has been saved.



Generation of reminder and recall notices

Reminder and recall notices are generated for every responsible person associated with a client, given that the following conditions are met:

- The client’s status is not set to “Permanently Inactive – Deceased” on the Client Information tab.
- The “Allow Reminder and Recall Contact?” indicator on the Client Information tab is set to “Yes.”
- The responsible person’s “Notices?” indicator in the Responsible Person(s) tab is checked.
- The responsible person(s) checked for notices has sufficient name and address information listed in the Responsible Person(s) tab.

10. County: This optional field will be used by public organizations that are responsible for all clients within the county.
11. Country of Birth: This field defaults to “United States.” Use the pick list to select a different country of birth, if applicable.
12. Last Notice: This field shows the last date that a recall/reminder notice was created for the client.
13. Updating Organization: Below the Personal Information Header, the name of the organization that last updated the client’s information displays in bold, along with the date the update was entered.

Client Information Tab

The Client Information tab gives additional information about the client, such as insurance carrier, primary care physician, chart number, etc. Only the Tracking Schedule and Funding Programs/Eligibilities (insurance/ medical assistance information) fields under this tab are required.

1. Chart #: You may type in your organization’s chart number for the client in this field. A client may have numerous chart numbers associated with him or her; each number is organization dependent.
2. Ethnicity: Choose the client’s ethnic background from the pick list provided.
3. Race: Choose the client’s race from the pick list provided.
4. Provider (PCP): Fill in the client’s primary care physician (PCP) or health care organization from the pick list, if provided. This information is used only for reporting.

5. School: Fill in the client’s school from the pick list, if provided. This information is used only for reporting.

6. **Tracking Schedule:** Choose the immunization tracking schedule that is being used for this client from the pick list. This required field defaults to the Center for Disease Control and Prevention/Advisory Committee on Immunization Practices (CDC/ACIP) schedule.
7. **Status:** Choose Active from the pick list if you want this client to be associated with your organization, meaning he or she is receiving services from you. When you specify a client as Inactive, you make him or her inactive for your organization only. This information affects recall and reminder notices and Clinic Assessment Software Application (CASA) and Health Plan Employer Data and Information Set (HEDIS) reporting. Choosing Permanently Inactive — Deceased will inactivate the client for all organizations using NESIIS. Choose this option only if you know the client to be deceased. Choose Moved Out of State if the client was active or inactive to the organization at one time, but no longer resides in the state of Nebraska.
8. **Allow Sharing of Immunization Data?:** Parents or responsible persons may choose not to share their immunization information. If you choose No from the pick list, the record will be accessible only by your organization. Other organizations trying to access the record will receive a message referring them to you for further client information.
9. **Allow Reminder and Recall Contact?:** By choosing Yes from the pick list, you are allowing reminder/recall notices to be sent to this client's responsible person(s). If the parent chooses not to have reminder/recall notices sent, choose No from the pick list.
10. **Funding Programs/Eligibilities:** This is a required field that gives information on the client's eligibility to receive publicly funded vaccines. To select an insurance type or funding program, highlight the appropriate funding source in the box at the left by clicking on it. Then press **ADD**. Multiple funding programs/eligibilities may be selected.
11. **Insurance Providers:** To select an insurance provider from the list at left, highlight the provider by clicking on it. Then press **ADD**. Multiple insurance providers may be selected. This information is used for HEDIS reporting.

Responsible Person(s) Tab

The Responsible Person(s) tab allows you to identify client contact information and the persons to whom you may send reminder/recall notices. The only required field under this tab is the Relation field. However, if you want notices sent to a responsible person, you will need to fill in the person's first and last name and full address, and check the Notices box.



Once a status of Permanently Inactive — Deceased has been entered in the Status field, the field can no longer be edited by the organization. To change a status of Permanently Inactive — Deceased, contact the NESIIS Help Desk.



Most organizations that select Active for a status but have not yet administered an immunization to the client will have their status display as a blank. Once one of these organizations administers an immunization to the client, the status will display as Active. For organizations with a separate Memorandum of Understanding related to patients, such as HMO and tribal organizations, the client status will default to Active immediately.

1. Click on the Responsible Person(s) tab.



Address Status

Address status information is located near the center of the Responsible Person(s) tab. The date and time the responsible person was last updated appear on the left; on the right, the address status line displays the result of address validation. The address validation process runs at night, so addresses entered will initially appear as "Not Validated" until validation occurs. Validated addresses allow responsible person or primary contact information to appear on Geographic Information Systems (GIS) maps.

Client Information		Responsible Person(s)			Client Comment(s)		
Responsible Person Listing							
Select	Last Name	First Name	Relationship	City	Notices	Primary	Address Validation
<input checked="" type="radio"/>	HOOD	MICHELLE	Mother		No		Not Validated
<input type="radio"/>	HOOD	GREG	Father		No		Not Validated
<input type="button" value="New"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/>							
Details for Responsible Person: MICHELLE HOOD							
Last Updated:				Address not yet validated			
Last Name	HOOD		Street Address				<input type="button" value="Next"/>
First Name	MICHELLE		Other Address				<input type="button" value="Cancel"/>
Middle Name			P.O. Box				
Relation	Mother		City				
Telephone	- -		State	NE	Zip	+4	
Extension			Language	ENGLISH			
E-Mail			Notices?	<input type="checkbox"/>		Primary?	<input type="checkbox"/>

2. To edit an existing responsible person, do the following:

- Click on the Select radio button next to the name of the person you wish to edit.
- Change or add information for the fields listed.
- Press **NEXT**.

3. To enter a new responsible person, fill in the following information:

- Last Name: Enter the last name of the responsible person into this field.
- First Name: Enter the first name of the responsible person into this field.
- Middle Name: Enter the responsible person's middle name in this field.
- Relation: Choose the relationship of the responsible person to the client from the pick list provided. This is a required field.
- Telephone: Enter the responsible person's telephone number, including the area code, in this field.
- Extension: Enter the responsible person's extension to the above telephone number, if any, into this field.
- Street Address: Enter the responsible person's street address into this field.

- Other Address: Enter the responsible person's additional address information, if any, into this field. For example, a suite number or apartment number could be entered here.
 - P.O. Box: Enter the responsible person's post office box, if any, into this field.
 - City: Enter the responsible person's city into this field.
 - State: Choose the responsible person's state from the pick list provided.
 - ZIP: Enter the responsible person's ZIP code in this field.
 - +4: Enter the responsible person's +4 code in this field, if it is known.
 - Language: Choose the language in which reminder/recall notices will be printed for this responsible person.
 - Notices?: Check this box if you wish reminder/recall notices to be sent to this responsible person.
 - Primary?: Check this box if you wish the displayed address to appear on client reports and on client screen headers.
4. To enter a new responsible person and save the information you entered in the Responsible Person Listing or view the next responsible person's record, press **NEXT**.
 5. To clear existing information and enter a new responsible person, press **NEW**.
 6. To cancel unsaved information you entered, press **CANCEL**.

Copying an existing record

1. Select the radio button next to the record you wish to copy on the Responsible Person Listing table.
2. Press **COPY**.
3. This information may now be edited and saved as another responsible person record.

Deleting an existing record

1. Select the radio button next to the record you wish to delete on the Responsible Person Listing table.
2. Press **DELETE**.
3. Press **OK** in the confirmation box.



Restart Comments If a client has a comment indicating the restart of a vaccine group and an Applies To Date is specified, all vaccinations prior to that date are not evaluated as part of the series. Any doses recorded on or after the Applies To Date will be evaluated as if they were the first doses received for that vaccine group.

Immunity Comments Immunity comments are linked to vaccine group recommendations. If a client has an immunity comment and an Applies To Date is specified, a recommendation for that vaccine group will not display on the client's record.

Client Refusal of Vaccine Comments NESIIS users may record multiple refusals of vaccines by entering an applies-to date for each refusal. Any organization may view refusals or add new refusals, but only the organization that owns the refusal may edit or delete it.

Client Comments Tab

The Client Comments tab allows you to enter comment and contraindication information for a client in pick list form.

1. Click on the Client Comments tab.

Select	Date	Client Comment
<input checked="" type="radio"/>	04/09/2007	Refusal of Influenza
<input type="radio"/>	04/20/2005	Refusal of Meningococcal
<input type="radio"/>	07/09/2005	Allergy to gelatin (anaphylactic)

Details for Client Comment ...

Client Comment:

Applies-To Date:

Refusal Owner: WIR Physicians

2. Enter the following information:

- Choose the appropriate comment/contraindication from the Client Comment pick list.
 - Enter the date to which the comment refers in the Applies-To Date field. Fill in the field using the MMDDYYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. Then choose a month and year from the pick lists at the top and choose a day by clicking on the appropriate calendar day. Press **OK**.
3. To enter the comment into the Client Comments Listing and enter a new comment or view the next comment, press **NEXT**.
 4. To clear existing information and enter a new comment, press **NEW**.
 5. To cancel unsaved information you entered, press **CANCEL**.
 6. To read comments in a list with more than 10 comments, use the scrolling arrows at the top right corner of the box. A counter near the scrolling arrows displays the number of comments entered.

Deleting an existing comment

1. Select the radio button next to the comment you wish to delete on the Client Comment Listing table. Comments regarding vaccine refusal can only be deleted by the owner of the comment.
2. Press **DELETE**.
3. Press **OK** in the confirmation box.

Saving Client Information

There are several ways to save information on the Manage Client/Enter New Client screens:

- Save: When pressed, the **SAVE** button at the top of the screen will save all information fields within the Personal Information Header, Client information Tab, Responsible Person(s) Tab, and Client Comment(s) Tab to the NESIIS database. Once the client data is saved, the message "Client Updated" will appear at the top of the Personal Information Header.
- History/Recommend: As with the **SAVE** button, the **HISTORY/RECOMMEND** button will save all information fields. Once the information is saved, the client's Immunization History screen will display.
- Record Immunization: When the **RECORD IMMUNIZATION** button is pressed, all information fields will be saved and the Pre-Select Immunizations screen will display. This button allows you to bypass the history screen for a client and go directly to adding immunizations.
- Reports: As with the **SAVE** button, the **REPORTS** button will save all information fields. Once the information is saved, the Reports Available for Client screen will display, so that a report may be generated for the client. Refer to the Reports and Forms chapter of this manual for more information on reports.
- Add Next: When the **ADD NEXT** button is pressed, all information fields will be saved and a blank Edit/Enter New Client screen will be displayed.



Applies-to Date and Refusal of Vaccine An appropriate Applies to Date must be entered for refusal comments on the Client Comments tab in order to be calculated correctly on assessment and benchmark reports.

Cancel: When pressed, the **CANCEL** button clears all entered information and does not save it to NESIIS. The Find Client or Enter New Client screen is displayed.

Deduplicating Client Records

After you enter a new client and press one of the buttons that will save the data, NESIIS initiates a process that ensures that the client information you entered does not duplicate a client that already exists in NESIIS.

If after attempting to save a new client you receive a message box titled "Single Client Match Detected," NESIIS has determined that the client you are attempting to save already exists in the database. You should select the client record by clicking the link provided.

If after attempting to save a new client you receive a message box titled "Client Match Detected," you should read the message and proceed carefully. A table below the message box contains one or more names of potential matches within NESIIS. Click on each last name to display his or her information. NESIIS will identify matching clients even if the client has had a name change; therefore, if you do receive a list of potential matches, click on the link(s) to determine whether one of the links matches your client's record.

Client Match Detected

Based on the information you entered, your client is likely already in WIR and is one of the clients listed below. Please review the demographic information for each of these clients and if none of them appears to be your client, you may then click the **Create New Client** button.

Please keep in mind that if you choose to ignore a client match and create a new record, that client will have two records in WIR, neither of which will be complete and accurate!

Possible Client Matches:1

Last Name	First Name	Birth Date	Chart #	Mother's Maiden First	Mother's Maiden Last	Gender	Telephone
STENSON	RANDY	08/07/1994		WANDA	STEUCK	U	

If after reviewing all the names given in the table you do not find a match for your client, press the **CREATE NEW CLIENT** button. A confirmation box will appear; press **OK**. Be aware that if you do override the listed matches and end up creating a duplicate record for a client, it will be difficult to manage the client's immunization and personal information and the system will lose its accuracy and efficiency.