Nebraska State Immunization Information System

User Manual

Production Build 7.2.8
Release Date: June 9, 2011

Updated Date: December 2013

NEBRASKA DEPARTMENT OF HEALTH AND HUMAN SERVICES

Division of Public Health

1 Introduction

In this chapter:

What are Immunization Information Systems?

Why Do We Need Immunization Information Systems?

The Nebraska State Immunization Information System

What Are Immunization Information Systems?

Immunization Information Systems are confidential, computerized state- or community-based information systems. In the *Healthy People 2020* program, the U.S. Department of Health and Human Services set a goal of increasing the proportion of children under 6 years of age whose immunization records are in a fully operational, population-based immunization information system and increasing the number of States that have 80% or adolescents with two or more age-appropriate immunizations recorded in an immunization information system.

Information systems enable public and private health care providers to consolidate and maintain computerized immunization records on all children within a given geographic area. They enable multiple authorized health care professionals to access the consolidated information on the immunizations that any child has received. They help doctors remind parents when their children are due or overdue for immunizations. They help health care professionals stay abreast of the complex immunization schedule.

Why We Need Immunization Information Systems

The U.S. now enjoys the highest immunization rates and lowest disease levels ever, but sustaining them is not easy. One of the greatest challenges is the growing complexity and volume of immunization information:

- Over 25,000 children are born each year in Nebraska, each needing 18-22 shots by age six to protect them from debilitating, life-threatening diseases.
- An increasingly complex childhood immunization schedule makes it difficult for health professionals to keep up, even with the help of books, charts, and training.
- Families are more mobile than ever before. They relocate, change employers, change insurers, and change doctors with increasing frequency.
- Research shows that many parents whose children are not up to date with their immunizations mistakenly believe that they are. Many doctors also overestimate the coverage of their patients.
- Because of increasing concerns about vaccine safety, some parents, in the absence of disease, may not choose to immunize their children. Better data about the immunizations given can help address these concerns.

Immunization information systems help to avoid the “peaks and valleys” of disease outbreaks by providing accurate, up-to-date information about the immunizations that children receive.

The Nebraska State Immunization Information System

The Nebraska State Immunization Information System (NESIIS) is a population-based Web application containing consolidated demographic and immunization history information. NESIIS is able to perform a variety of functions for health care providers, including:

- Recording immunizations, contraindications, and reactions.
- Validating immunization history and providing immunization recommendations.
- Producing recall and reminder notices, vaccine usage and client reports, and Clinic Assessment Software Application (CoCASA) extracts.
- Managing vaccine inventory.

When a provider joins NESIIS, immunization data from existing electronic data systems can be loaded into the information system's database. In addition, NESIIS receives weekly birth, death, and adoption data from the Nebraska Vital Records database. New births are generally loaded into NESIIS within two to three weeks.

NESIIS is provided free of charge to health care providers in Nebraska. To use the system, providers are required to attend a NESIIS training session and sign an enrollment agreement.

To view more information on NESIIS, visit the website http://dhhs.ne.gov/publichealth/Pages/nesiis_index.aspx.

2 System Requirements

In this chapter:

Internet Access

Since NESIIS is a Web-based application, you will need reliable Internet access, preferably with a dedicated connection, to access NESIIS.

A modem connection will also work, but will perform more slowly. NESIIS does not recommend using modem access over a cellular phone. This type of connection is expensive and too unreliable to support a Web application.

Hardware Requirements

The following are minimum hardware requirements for accessing NESIIS:

- Pentium 100 MHz computer (500 MHz or higher recommended).
- 32 MB RAM (64 MB or higher recommended).
- 500 MB free disk space.
- Screen display set at a minimum of 800 x 600 resolution and 256 colors.
- Mouse.

Software Requirements

- Internet Browser software:
    - Microsoft® Internet Explorer®, version 6.0 or higher, is strongly recommended. Fire Fox or Safari work as well.
- Windows® 98 and all subsequent Windows® versions.
- Adobe® Reader®. Mac OS includes, PDF reader by default
- For networked computers, port 443 of the network firewall must be open for outgoing HTTPS (secure HTTP). To verify, try typing the NESIIS Web address on your Internet browser: https://nesiis-dhhs-prod.ne.gov/prd_ir/portalInfoManager.do. If you are unable to access the site, contact your network administrator.

3 Accessing NESIIS

In this chapter:

Opening NESIIS

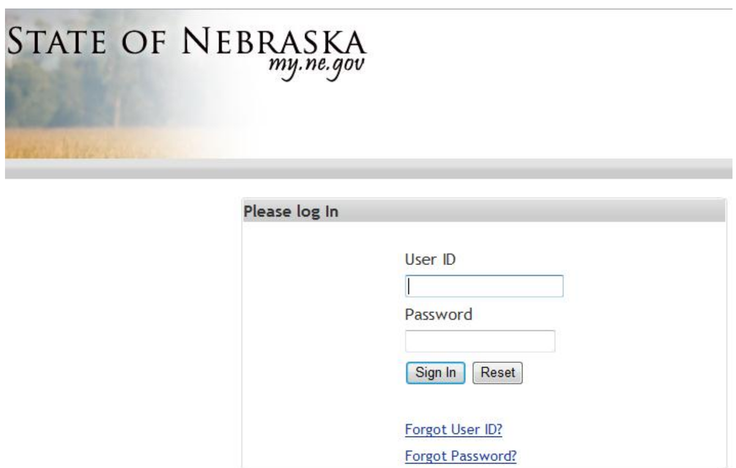
To access NESIIS, do the following:

1. Open your Internet browser. To open your browser, locate the browser icon on your computer's desktop (screen with program icons). If you are using Microsoft® Internet Explorer® your icon will look like ( ). Once you have located the icon, double click on it with your left mouse button.
2. Type in the full NESIIS address:

   https://nesiis-dhhs-prod.ne.gov/prd_ir/portalInfoManager.do.

   Press **ENTER** (Internet Explorer®). If you do not reach the Nebraska Directory Services Login screen after correctly typing in this address, port 443 of your network's firewall may be closed. Contact your network administrator to open this port for outgoing HTTPS, which is secure HTTP.

For security purposes, you will be required to change your Directory Services password periodically. Directory Services will display the Change Password screen when your password has expired.



Enter your password carefully when logging in. If you enter an incorrect password three times, your user account will be dis-abled. If this happens, contact the NESIIS Help Desk.

3. Depending on your browser, you may receive one or more security/ certificate warnings before the browser will open NESIIS. Accept any warnings regarding secure connections or security certificates. Internet Explorer® will give you the option of turning off these warnings for future use.
4. At the DIRECTORY SERVICES login screen, enter your username and password. **The information on this screen is case sensitive; enter the information exactly as you received it**. Press "login".
5. You should now be at the NESIIS log in page. At the NESIIS login screen, enter your organization code, username, and password. The information on this screen is case sensitive; enter the information exactly as you received it. You should only have to enter this information once. Directory Services will watch and remember it for your next login.

6. Press the **LOGIN** button.
7. Press either "**I Agree**" or "**I Do Not Agree**" in the security notification box that displays. If you choose "**I Do Not Agree**," your access to NESIIS will be disabled. This box will appear at the first login and once every 365 days thereafter. (Not Pictured)
8. The NESIIS home page will now display. (Pictured Above)

Login Menu Items

At the top of the login page, three menu items appear: Home, Forms, and Related Links. By hovering the cursor over one of these menu items, you may access a drop-down menu. To select an item from the drop-down menu, simply click the desired item.

Post Login

Once in NESIIS, you may access the post-login page to switch organizations, manage users, or manage your own account. To do this, simply click the Manage Access/Account menu option at the top of the screen in NESIIS. The post-login page will display. For more information on the functions available on the post-login page, refer to the Managing My Account and Managing Users and Organizations chapters of this manual.

Exiting NESIIS

NESIIS may be exited from any screen within the system by pressing the Logout menu option at the top of the screen. Once you logout, you will be returned to the NESIIS login page. You may minimize your browser at this point by pressing in the upper right corner of your computer screen.

If you wish to close your browser completely, you may either press in the upper right hand corner of your computer screen, or you may click on **File** and then **Close** on the browser's menu bar. If you do not see the menu bar, your browser may be in Full Screen view; press **F11** on your keyboard.

The information on the Login screen is case-sensitive; in other words, you need to enter the data in upper and/or lowercase, exactly how you received it.

You will be required to change your Directory Services password every 90 days. Directory Services will display the Change Password screen when your password has expired.

Enter your password carefully when logging in. If you enter an incorrect password three times, your user account will be disabled. If this happens, contact your NESIIS Help Desk

4 Public Access

In this chapter:

Retrieving Immunization Records

Accessing the Parent Brochure

By providing key demographic information, families and individuals may access immunization records in the NESIIS database without logging in to the system. This feature, known as public access, allows individuals to query the system for records by providing a client's Social Security number (SSN), date of birth, and first and last name.

For an immunization record to be retrieved through the public access feature, a Social Security Number must be entered with the client's information in NESIIS. Individuals are instructed to contact their health care provider if a possible match does not have a SSN associated with it, or if there are duplicate or no matches for the record.

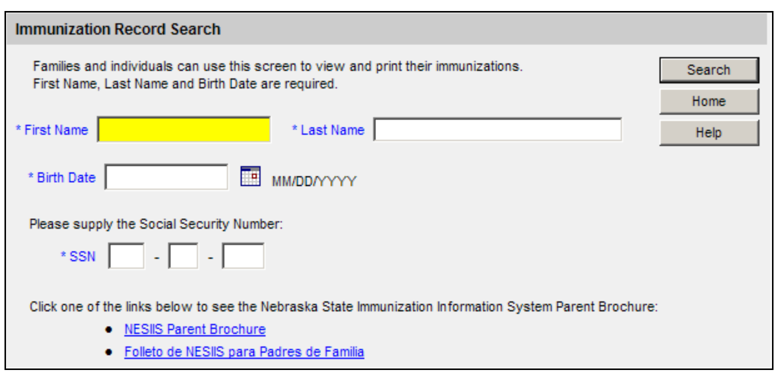
Retrieving Immunization Records

Individuals using the NESIIS public access feature will need to access the NDHHS Immunization Program web page. To open this page, go to http://dhhs.ne.gov/publichealth/Pages/nesiis_index.aspx.

At the NESIIS Public Access portal, follow these steps:

1. Click the **Public Immunization Record Access** link located on the "Nebraska State Immunization Information (NESIIS) General Public Access web page.

2. Enter the client's first name in the First Name field.
3. Enter the client's last name in the Last Name field.


Immunization Record Search

Families and individuals can use this screen to view and print their immunizations.
First Name, Last Name and Birth Date are required.

Search
Home
Help

* First Name
* Last Name
* Birth Date MM/DD/YYYY

Please supply the Social Security Number:

* SSN - -

Click one of the links below to see the Nebraska State Immunization Information System Parent Brochure:

- NESIIS Parent Brochure
- Folleto de NESIIS para Padres de Familia

4. Enter the client's birth date using the MM/DD/YYYY format in the Birth Date field, 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**.
5. Enter the client's Social Security Number in the appropriate field.
6. Press **SEARCH**.

1. The client's immunization record and a list of recommended

immunizations will display. If the immunization record does not display and you receive an error message, the client record for which you are searching may not have the SSN stored in the system.

2. Press **PRINT** to print out the immunization record, if desired.

To successfully obtain a client's record through the public access feature, the birth date and SSN entered must match the client's NESIIS information exactly, and the client name entered must closely match the name stored in the NESIIS database.

5 Optimizing NESIIS

In this chapter:

Creating Favorites and Shortcuts

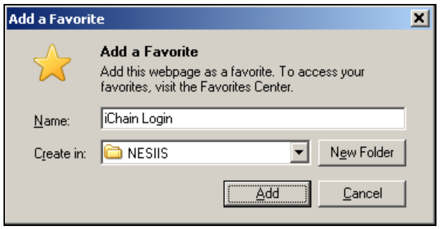
To access NESIIS quickly, we recommend you set up a shortcut icon for NESIIS, set NESIIS as a favorite (also known as a bookmark), or set NESIIS as your browser's home page.

Adding NESIIS to Favorites (Internet Explorer®):

1. Click **File** and choose **Open**.
2. Type in the NESIIS Web address:

   https://nesiis-dhhs-prod.ne.gov/prd_ir/portalInfoManager.do.

   Press **OK**.
3. Accept any security or certificate warnings.
4. Once at the login screen, prior to entering any information, click on Favorites on your browser's menu bar or press the **FAVORITES** button (or Ctrl+D).



5. Click **Add to Favorites** and press **OK**.
6. The Nebraska Immunization Information System should now appear on your browser's list of favorite sites.

Creating a NESIIS Shortcut on Your Desktop (Internet Explorer®):

Once you add NESIIS as a favorite, you may copy it as a shortcut to your computer's desktop. Once the shortcut is created, simply double-click on it to open your browser to the NESIIS login screen. To create a NESIIS shortcut:

1. Click on **Favorites** and right-click on the Nebraska Immunization Information System favorite.
2. Click on **Send To** and then **Desktop** (create shortcut).
3. Press **OK**.

If there is no Desktop option under the Send To pop-up menu, do the following:

1. After right-clicking on the Nebraska Immunization Information System favorite, choose **Copy**.
2. Minimize the Internet Explorer® screen.

3. Choose an open area on your desktop and **right-click**.
4. Choose **Paste Shortcut**.

Alternately, you may set a shortcut by doing the following:

1. At the NESIIS login screen, before entering any data, choose **File** from the menu bar.
2. Click on **Send** and **Shortcut to Desktop**.

Adding a NESIIS Bookmark:

1. Click **File** and choose **Open Web Location**.
2. Type in the NESIIS Web address:

   https://nesiis-dhhs-prod.ne.gov/prd_ir/portalInfoManager.do.

3. Press **OPEN**.
4. Accept any security or certificate warnings.
5. Once at the login screen, click on Bookmarks on your browser's menu bar. Choose **Add Current Page**.
6. The Nebraska Immunization Information System should now appear on your browser's list of bookmarks.

Running Reports with Adobe® Reader®

NESIIS uses Adobe® Reader® to display reports in portable document file (PDF) format. This format allows you to print reports exactly as they appear online.

Running Adobe® Reader® Files

The first time a report is displayed using Adobe® Reader®, a window may appear asking whether you want to run the file or save the file to disk. Choose "Run the file" and "Do not display this message again."

If you try to print a report in Adobe® Reader® and find that some of the text is illegible, choose **Edit**, **Preferences**, and **Smoothing**. In the Smoothing dialog box, make sure the "Smooth text" and "Smooth images" boxes are checked.

Problems Running Reports in Adobe® Reader®

If, while using Adobe® Reader®, you get a small icon resembling a segmented cube and the report does not display, Adobe® Reader® needs to be opened in a separate window. To do this, follow these steps:

1. Press the **START** button on the lower left corner of your computer screen.

2. Click on **Programs**.
3. Click on **Adobe® Reader®**.
4. On the Adobe® Reader® menu bar, click **Edit**.
5. Choose **Preferences**.
6. Choose **Internet**.
7. Under Web Browser Options, uncheck **Display PDF in Browser**.
8. Press **OK**.

Try running your report again. If you continue to have problems, contact the NESIIS Help Desk at (888) 433-2510.

File Transfer Protocol (FTP) Server Access

When running reports and data downloads, NESIIS queries a File Transfer Protocol (FTP) server to ready the file. If your network has blocked FTP access for any reason or if FTP wasn't installed with your browser, you will be unable to run reports or download data. Contact your information systems (IS) staff if you suspect your FTP access is blocked.

6 Home Page

In this chapter:

Menu Bar

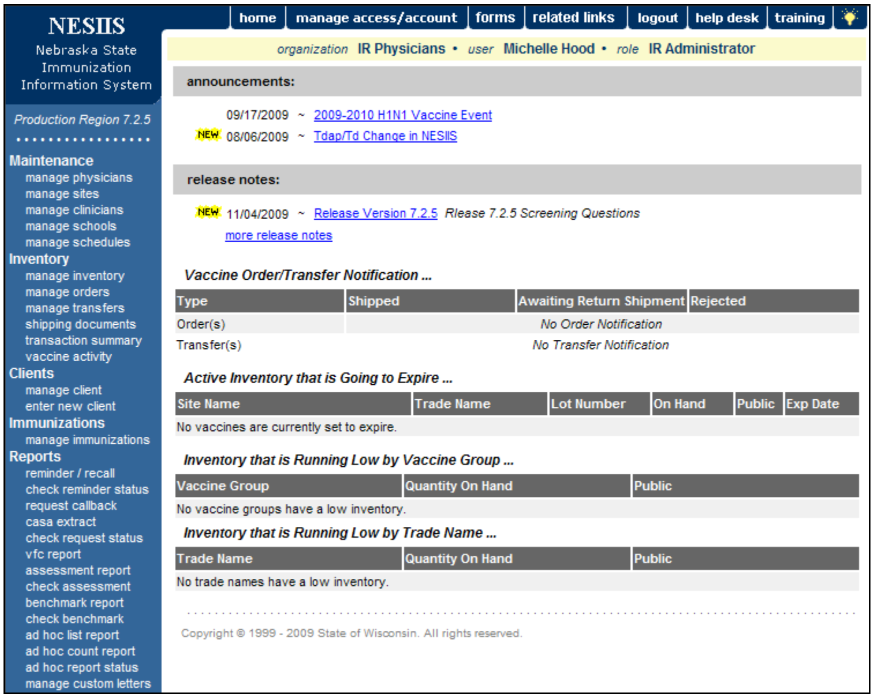
Menu Panel

Announcements

Release Notes

Inventory Alerts

The NESIIS home page opens after you have provided a valid organization code, username, and password. The home page of NESIIS is divided into several sections.



Menu Bar

At the top of the screen toward the right side, you have several menu options. These menu options will appear on every screen within NESIIS. The options available are the following:

Home: Clicking this menu option will return you to the NESIIS home page from anywhere in the system.

Manage Access/Account: Clicking this menu option will bring you to the post-login page, where you may switch organizations, manage your account, manage access to other accounts, or access training options. Refer to the Managing Users and Organizations and Managing My Account chapters of this manual for more information on these functions.

Forms: Clicking on this menu option will bring you to a variety of forms for Applications, Schools and NESIIS Security & Confidentiality forms.

Related Links: Clicking on this menu option will link you up to some of the most important sites that we use CDC, VAERS and Immunization Action Coalition.

Logout: Clicking on this menu option will log you out of your current NESIIS session and return you to the Login screen. You may logout from any screen within NESIIS.

Help Desk: Clicking on this menu option will give you a screen with contact information for the NESIIS Help Desk.

Training: Clicking on this menu option will display any assigned training courses on the post-login page.

Online Help: Clicking on the light bulb ( ) in the right corner of the screen brings up page-specific help. Refer to the Appendix of this manual for more information on online help.

Directly below the menu bar is a row of information highlighted in a different color. This row contains your organization’s name, your first and last name, and your role within the organization. If any of this information is incorrect, contact your organization administrator.

Menu Panel

The menu panel is color-shaded and appears on the left of all screens within NESIIS.

Menu Selections

The menu panel contains links options that, when clicked, take you to the functions of the NESIIS Web application. These links, which include functions under Reports, Immunizations, Clients, Maintenance, and others, are used to navigate NESIIS. Your role will determine your access to these functions.

Announcements

The right hand portion of the home page, which has a white background, contains recent information on enhancements and maintenance relating to NESIIS. Recent announcements that have not been viewed will have “New” highlighted in yellow alongside them. Once you have viewed the announcement and returned to the home page, the “New” flag will disappear. To view a full announcement, do the following:

1. Click the underlined announcement title.
2. The NESIIS Announcement screen will display, giving full details and the posting date of the selected title.
3. Click the **Return to Main Page** link to return to the home page.

Release Notes

Release Notes are found under the Announcements section of the home page. This section contains information regarding new releases of NESIIS and features included in the releases. Release notes may be viewed in the same manner as announcements.

Inventory Alerts

The inventory alerts section will appear on the NESIIS home page for users with Administrator and Inventory Control levels of access.

The inventory alerts section of the home page consists of two tables. The top table, Active Inventory That is Going to Expire, lists vaccines at each site that will expire within 60 days. The bottom table lists, by site, inventory that is nearly depleted.

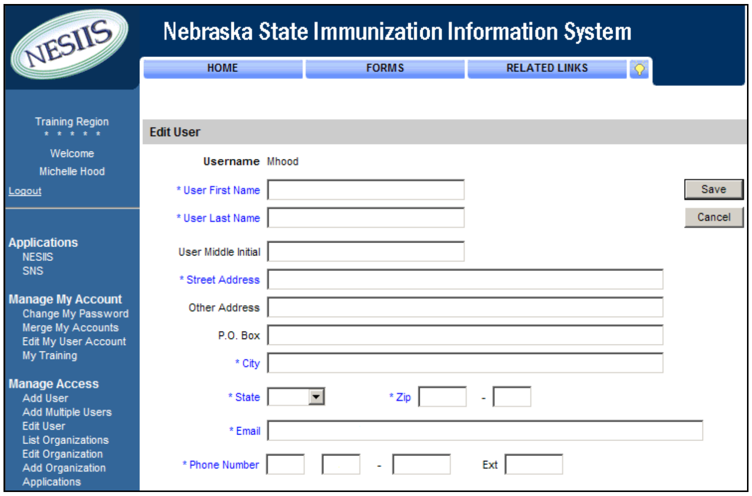
7 Managing My Account

In this chapter:

Editing User Information

Editing User Information

1. Access the post-login page by logging in to NESIIS or by clicking the **Manage Access/Account** menu option at the top of the NESIIS screen.
2. Click **Edit My User Account** under the Manage My Account section of the menu panel.



3. Edit your first or last name in the appropriate fields. You also may enter or edit your middle initial, mailing address, e-mail address, or telephone number information in the appropriate fields.
4. Press **SAVE**. If changes were made, the message “User Updated” appears on the screen.
5. Return to the NESIIS application by clicking on **NESIIS** on the left hand side of the screen (listed under the Applications section) then click on the name of your **Organization** listed in the top of the white portion of the screen.

8 Maintenance

GETTING STARTED: For Administrators, Clinical Leads, and Clinical Managers

In this chapter:

The Maintenance section on the menu panel allows users with administrator rights to add and update information on schools, physicians, clinic sites, and clinicians.

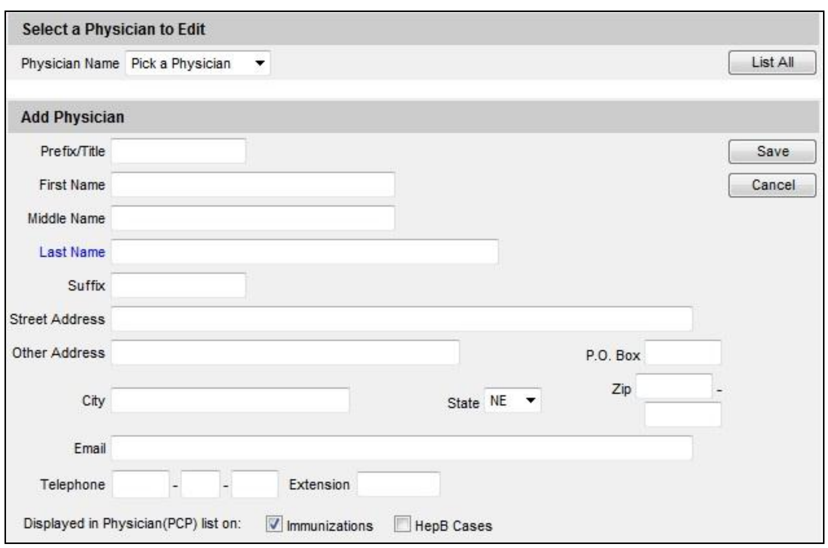
Managing Physicians

Administrators use the Add Physician/Edit Physician screens to enter new and update existing primary care providers. Health care organizations or clinic names may also be entered in the Add Physician screen. Physicians or health care organizations entered on this screen will be available for selection as primary care providers from a pick list on the Manage Client screen. Reports may then be generated from this data.

Adding Physicians

Required fields are shown in **blue** type. For example, when entering information on the Add Physician screen, only the physician's last name is required; thus it is shown in blue type. All other input fields on this screen are optional.

1. Click **Manage Physicians** under the Maintenance section of the menu panel.
2. On the Manage Physicians screen, press **ADD PHYSICIAN**.
3. At the Add Physician box, fill in the required field, Last Name, plus any additional information you wish to supply about the physician. The Prefix/Title field, for example, could be filled with "Dr." and the Suffix field would then be "M.D." To add a physicians name, type the physicians name in the Last Name field and their first name in the First Name field.



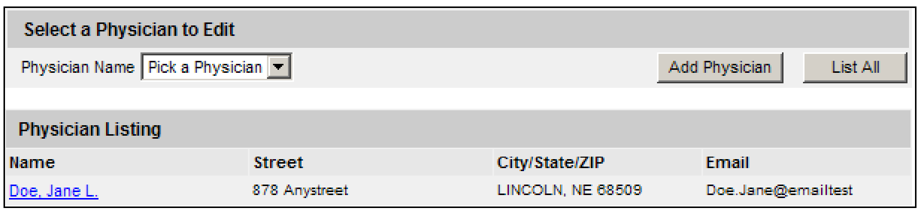
4. Press **SAVE**.

When entering a physician or health care organization in the Add Physician screen, keep in mind that how you organize this information (by specific doctor, clinic, or both) will be a factor in how you will be able to generate recall and reminder notices for your clients.

5. Once the physician is successfully saved, “Physician Added” will appear in the upper right corner of the Edit Physician box.
6. Press **CANCEL** twice to return to the Manage Physicians screen.

Editing Physician Information

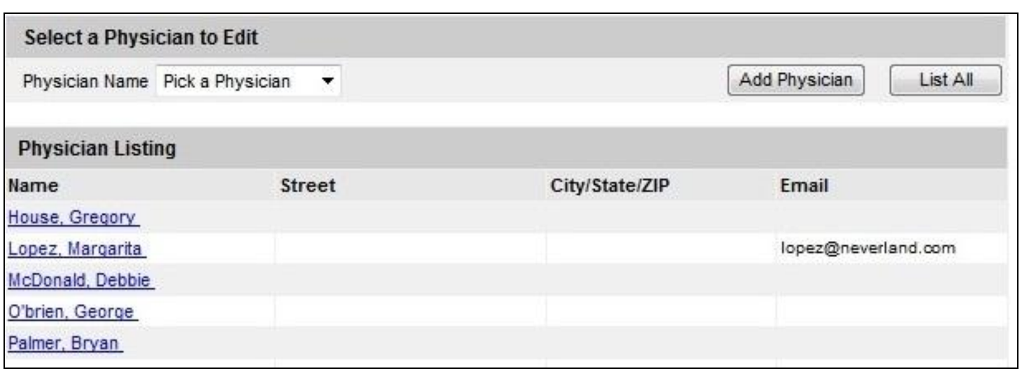
1. Click **Manage Physicians** under the Maintenance section of the menu panel.
2. On the Manage Physicians screen, choose the physician whose information you would like to edit from the Physician Name pick list at the top of the screen, or click the physician’s name in the Physician Listing at the bottom of the screen.



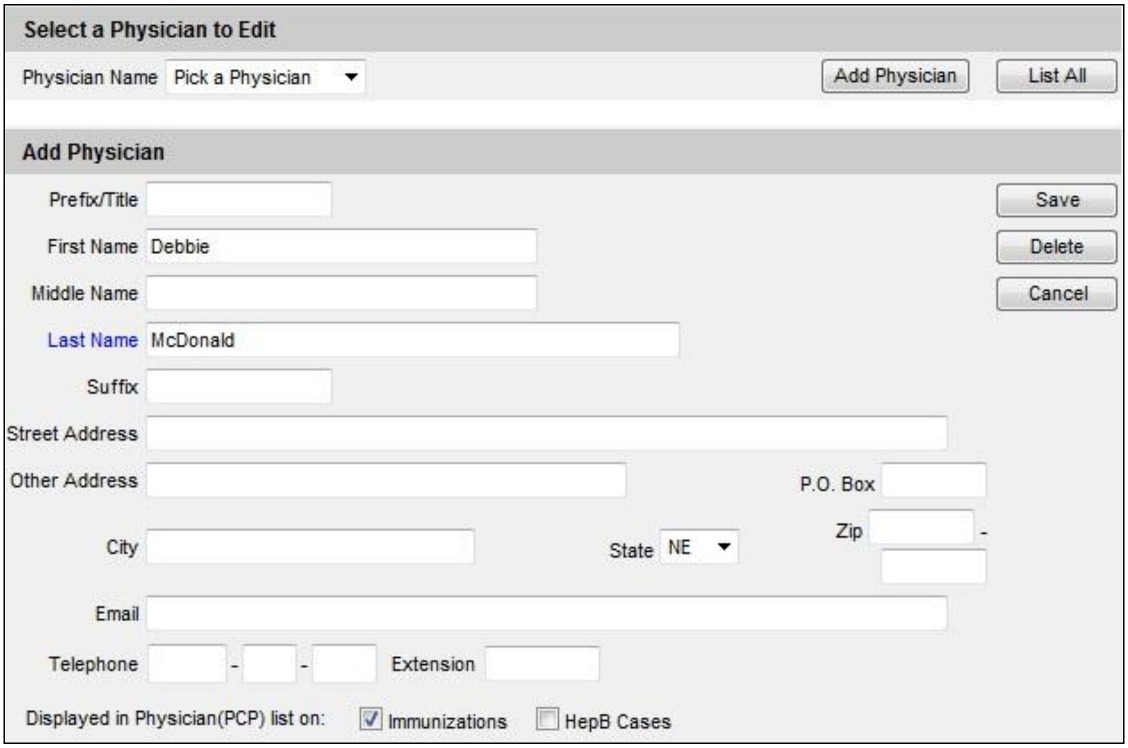
3. Add or change information in the Edit Physician box.
4. Press **SAVE**.
5. Once your changes are successfully saved, “Physician Updated” will appear in the upper right corner of the Edit Physician box.
6. Press **CANCEL** twice to return to the Manage Physicians screen.

Deleting Physicians

1. Click **Manage Physicians** under the Maintenance section of the menu panel.



2. On the Manage Physicians screen, choose the physician whose information you would like to delete from the Physician Name pick list at the top of the screen, or click on the physician’s name in the Physician Listing at the bottom of the screen.



3. In the Edit Physician box, press **DELETE**.
4. A box will open asking if you want to delete this physician. Press **OK**.
5. Once your changes are successfully saved, "Physician Deleted" will appear in the upper right corner of the Manage Physicians screen.

Listing All Physicians

A list of all physicians entered into an organization's database may be viewed by pressing **LIST ALL** on the Select a Physician to Edit screen.

Printing All Physicians

To print out a list of all the primary care providers in your organization's database, follow these steps:

1. Click **Manage Physicians** under Maintenance in the menu panel.
2. Press **LIST ALL** in the Select a Physician to Edit box.
3. Do either of the following:
   - Choose **File**, then **Print**, from your browser's menu bar. In the Print dialog box, press **OK**.
   - Press the printer icon () on your browser's toolbar.
   - If your printout is cut off, try setting your printer to landscape.

Managing Sites

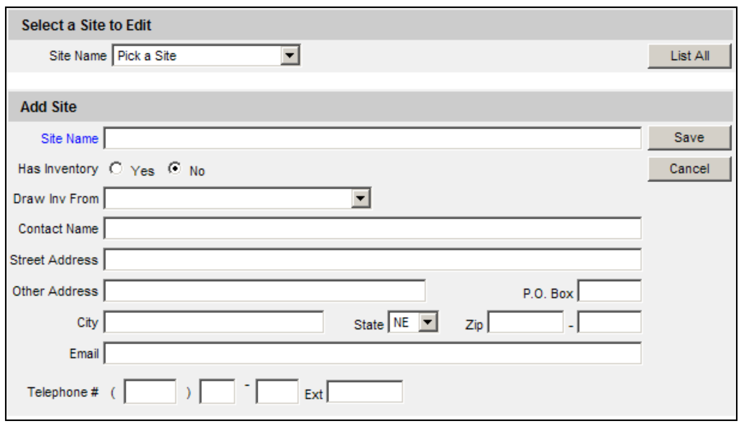
Required fields are shown in **blue** type. For example, when entering information on the Add Site screen the Site Name is required; thus it is shown in blue type. Input fields not shown in blue are optional.

Administrators use the Manage Site screens to add new or update existing sites that provide immunizations within their organizations. Once a site is added to NESIIS, it is available from several pick lists used for immunization recording and reporting.

Adding Sites

1. Click **Manage Sites** under the Maintenance section of the menu panel.
2. On the Manage Sites screen, press **ADD SITE**.

When inventory is drawn from another site, the source site must be selected from a pick list. Therefore, you will need to create all sites that maintain inventory prior to adding sites that draw from those inventories.



It is important to tie sites that draw inventory to their inventory sources; doing this will allow the system to be able to keep an accurate count of all vaccines.

3. Within the Add Site box, fill in the following information:
   - Enter the site name in the required field.
   - Indicate whether the site maintains its own vaccine inventory or whether it draws inventory from another source by clicking the Yes or No radio button () under Has Inventory. If the site draws inventory from another source, choose the source from the Draw Inv From pick list. All sites with inventory *must* be created prior to setting a site that draws from another.
   - Complete any additional information you wish to supply on the site.
4. Press **SAVE**.
5. Once your site has been successfully saved, “Site Added” will appear in the upper right corner of the Edit Site box.
6. Press **CANCEL** twice to return to the Manage Sites screen.

Sites that draw inventory from another site are shown indented on site pick lists in NESIIS.

Editing Site Information

1. Click **Manage Sites** under the Maintenance section of the menu panel.
2. On the Manage Sites screen, choose the site whose information you would like to edit from the Site Name pick list at the top of the screen, or click the site name in the Site Listing at the bottom of the screen.
3. Add or change information on the Add Site box.
4. Press **SAVE**.
5. Once your site has been successfully saved, "Site Updated" will appear in the upper right corner of the Edit Site box.
6. Press **CANCEL** twice to return to the Manage Sites screen.

Deleting Sites

1. Click **Manage Sites** under the Maintenance section of the menu panel.
2. On the Manage Sites screen, choose the site whose information you would like to delete from the Site Name pick list at the top of the screen, or click the site name in the Site Listing at the bottom of the screen.
3. In the Edit Site box, press **DELETE**.
4. A box will open asking if you want to delete this site. Press **OK**.
5. NESIIS will return to the Manage Sites screen and the message "Site Deleted" will appear at the upper right corner of the screen.

Listing All Sites

A list of all sites entered into an organization's database may be viewed by choosing **LIST ALL** on the Manage Sites screen. This table lists the name of the site, the contact name and telephone number for the site, and whether the site has its own inventory or draws from another site.

Printing All Sites

To print out a list of all sites in your organization, follow these steps:

1. Click **Manage Sites** under Maintenance on the menu panel.
2. Press **LIST ALL** in the Select a Site to Edit box.
3. Do either of the following:
   - Choose **File**, then **Print**, from your browser's menu bar.
     In the Print dialog box, press **OK**.
   - Press the printer icon () on your browser's toolbar.

4. If your printout is cut off, try setting your printer to landscape.

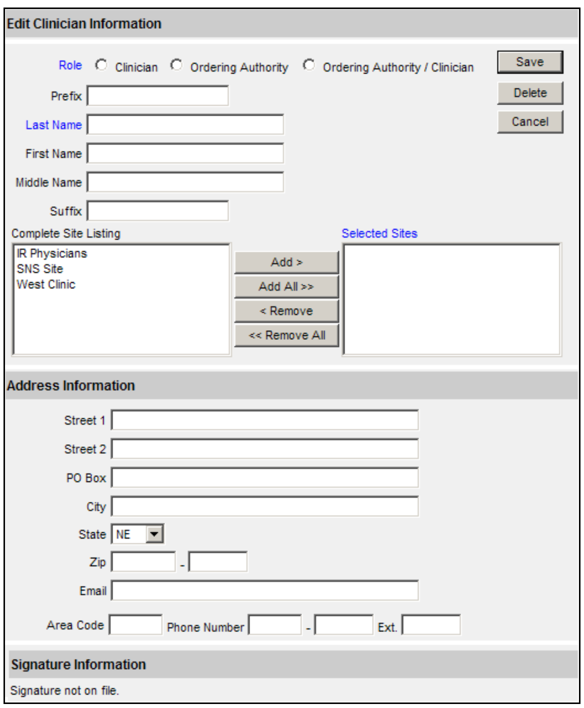
Managing Clinicians

Clinicians are the individuals within the organization who administer and/or approve the administration of vaccines. A clinician may be associated with one or more clinic sites. The organization administrator will use the Manage Clinicians function to enter new and update existing clinicians within the organization. Clinicians added to the system through this function will be available from pick lists used for recording immunizations.

Required fields are shown in **blue** type. For example, when entering information on the Managing Clinicians screen, the Last Name field is required; thus it is shown in blue type. Input fields not shown in blue are optional.

Adding Clinicians

1. Click **Manage Clinicians** under the Maintenance section of the menu panel.
2. Press **ADD CLINICIAN**.



When entering clinician site information on the Add Clinician Information screen, you may move the sites in the field in the middle of the screen from left to right simply by double-clicking them.

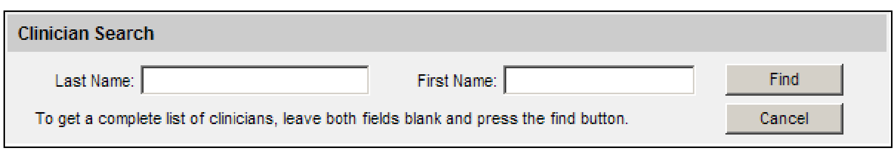
3. At the Add Clinician Information screen, choose a role for the clinician. Definitions of these roles are as follows:
   - **Clinician:** The clinician is the person who administers the vaccination.
   - **Ordering Authority:** The ordering authority is the person (with prescribing authority) that gives permission to the clinic staff to administer vaccinations to the clients.
   - **Ordering Authority/Clinician:** Check this option if the person both

authorizes and administers vaccines, such as a pediatrician.

4. Fill in the required field, Last Name, and any other fields you wish to complete. The Prefix field, for example, might be filled with “Dr.” and the Suffix field would then be “M.D.”
5. In the Complete Site Listing field at the bottom of the screen, highlight a site with which the clinician will be associated and press **ADD>**. Do this for each site at which the clinician may practice. If the clinician is associated with all the sites in the Complete Site Listing, press **ADD ALL>>**.
6. Press **SAVE**.
7. After the clinician is successfully saved, the message “Record Up-dated” will appear at the top of the screen.
8. Press **CANCEL** to return to the Manage Clinicians screen.

Editing Clinician Information

1. Click **Manage Clinicians** under the Maintenance section of the menu panel.
2. Press **FIND CLINICIAN**, or choose a health care site from the Site List and click the appropriate clinician name on the table at the bottom of the Manage Clinicians screen. If you choose this latter option, skip to Step 4.
3. At the Clinician Search screen, enter the last and first names of the clinician and press **FIND** to bring up his or her information. Then click his or her last name in the Search Results table, or leave both fields blank and press **FIND** to bring up a list of clinicians within the organization. You may then click on the last name of the clinician within the Search Results table to bring up his or her information.



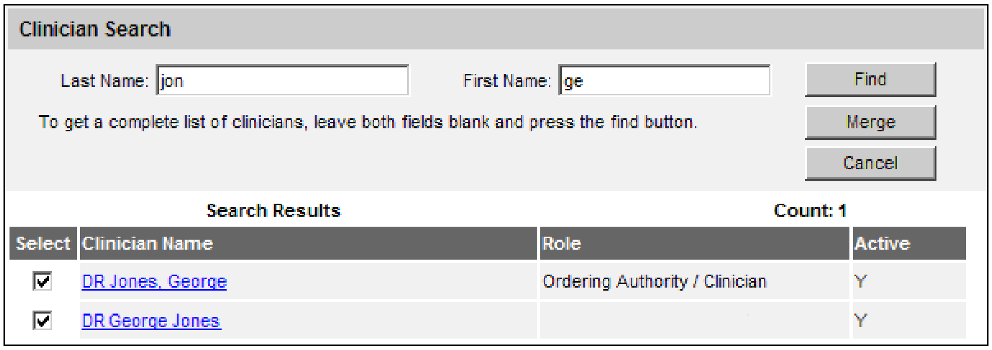
4. Make the desired changes or updates to the clinician’s information.
5. Press **SAVE**.
6. Once the clinician’s information is successfully updated, the message “Record Updated” will appear at the top of the screen.
7. To return to the Manage Clinicians screen, press **CANCEL**.

Merging Clinicians

Occasionally, clinicians are entered more than once in NESIIS, creating duplicate records. To eliminate extraneous records using the NESIIS merge clinician feature, follow these steps:

1. Click **Manage Clinicians** under the Maintenance section of the menu panel.

2. Choose a health care site from the Site List and press **FIND CLINICIAN**.
3. Enter the last and first names of the clinician. Press **FIND**.
4. Select at least two clinicians from the search results table and press **MERGE**.



5. At the Clinician Merge screen, select the clinician record that you wish to keep. Press **KEEP SELECTED**.

Deleting Clinicians

1. Click **Manage Clinicians** under the Maintenance section of the menu panel.
2. On the Manage Clinicians screen, choose a health care site from the Site List.
3. Press **FIND CLINICIAN**, or click the appropriate clinician name in the table at the bottom of the Manage Clinicians screen. If you choose this latter option, skip to Step 5.
4. At the Clinician Search screen, enter the first and last name of the clinician and press **FIND** to bring up his or her information. Then click his or her last name in the Search Results table, or leave both fields blank and press **FIND** to bring up a list of clinicians within the organization. You may then click the last name of the clinician within the Search Results table to bring up his or her information.
5. At the Edit Clinician Information screen, press **DELETE**.
6. A box will open asking if you want to delete this clinician. Press **OK**.
7. NESIIS will return you to the Manage Clinicians screen.

Listing All Clinicians

1. Click **Manage Clinicians** under the Maintenance section of the menu panel.
2. On the Manage Clinicians screen, press **CLINICIAN LIST**.
3. The Clinician Listing screen will open, showing all available clinicians, their site association(s), and their role(s).
4. Press **CLOSE** to return to the Manage Clinicians screen.

Printing All Clinicians

To print out a list of all the clinicians in your organization's database, follow these steps:

1. Click **Manage Clinicians** under Maintenance in the menu panel.
2. Press **CLINICIAN LIST** at the Manage Clinicians screen.
3. Do either of the following:
    - Choose **File**, then **Print**, from your browser's menu bar. In the Print dialog box, press **OK**.
    - Press the printer icon ( ) on your browser's toolbar.
4. If your printout cut off, try setting your printer to landscape.

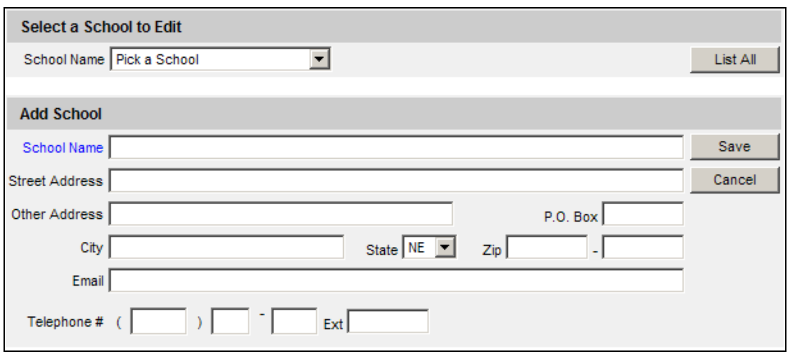
Managing Schools

Administrators may enter new and update existing schools and daycare centers using the Manage Schools function. Schools entered using this function will be available for selection from a pick list on the Manage Client screen. Reports may then be generated by school.

Adding Schools

Required fields are shown in **blue** type. For example, when entering information on the Add School screen, the School Name is required; thus it is shown in blue type. Input fields not shown in blue are optional.

1. Click **Manage Schools** under the Maintenance section of the menu panel.
2. On the Manage Schools screen, press **ADD SCHOOL**.

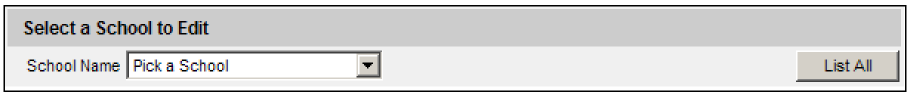


3. At the Add School box, fill in the name of the school in the School Name text field. Enter any additional information you wish to supply for the school in the appropriate fields.
4. Press **SAVE**.
5. Once your school information is successfully saved, "School Added" will appear in the upper right corner of the Edit School box.

6. Press **CANCEL** twice to return to the Manage Schools screen.

Editing School Information

1. Click **Manage Schools** under the Maintenance section of the menu panel.
2. On the Manage Schools screen, choose the school whose information you would like to edit from the Select a School to Edit pick list at the top of the screen, or click the school's name in the School Listing at the bottom of the screen.



3. Add or change information in the Add School box.
4. Press **SAVE**.
5. Once your changes are successfully saved, "School Updated" will appear in the upper right corner of the box.
6. Press **CANCEL** twice to return to the Manage Schools screen.

Deleting Schools

1. Click **Manage Schools** under the Maintenance section of the menu panel.
2. On the Manage Schools screen, choose the school whose information you would like to delete from the Select a School to Edit pick list at the top of the screen.
3. In the Edit School box, press **DELETE**.
4. A box will open asking if you want to delete this school. Press **OK**.
5. NESIIS will return to the Manage Schools screen and the message "School deleted" will appear at the upper right corner of the screen.

Listing All Schools

A list of all schools entered into an organization's database may be viewed by choosing **LIST ALL** on the Manage Schools screen.

Printing All Schools

To print out a list of all the schools in your organization's database, follow these steps:

1. Click **Manage Schools** under Maintenance on the menu panel.
2. Press **LIST ALL** in the Select a School to Edit box.
3. Do either of the following:

- Choose **File**, then **Print**, from your browser's menu bar. In the Print dialog box, press **OK**.
- Press the printer icon () on your browser's toolbar.

9 Managing Inventory

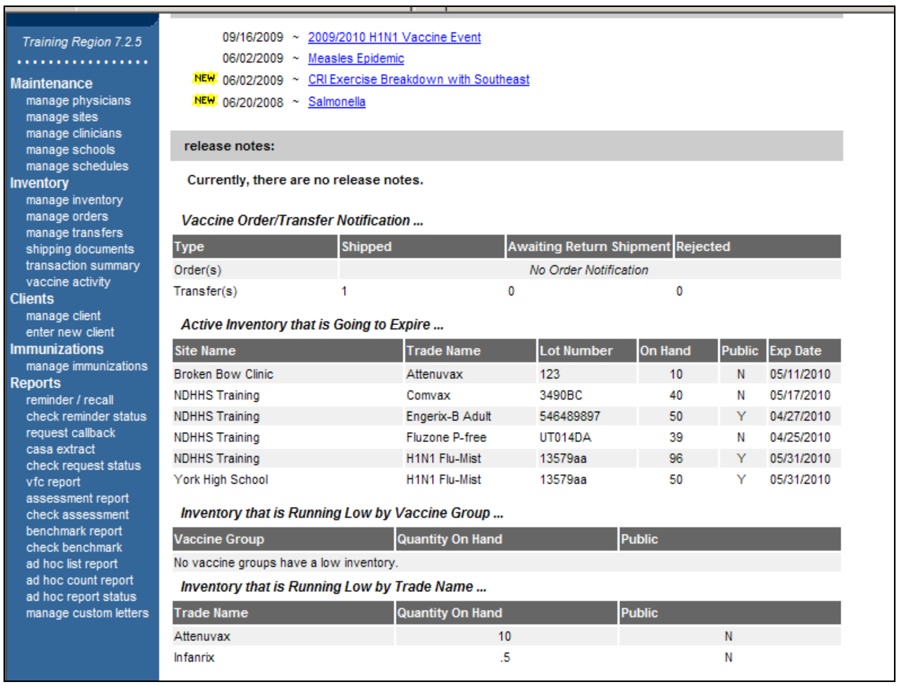
In this chapter:

The inventory management function of NESIIS is used to view, add, or update any vaccine in an organization's inventory. This function is designed to be a complete tracking system for a provider's vaccine inventory.

The **red** type in the View Inventory screen indicates that a vaccine is inactive. A vaccine may be inactive for a number of reasons; the inventory for that vaccine's lot number may be used up, the vaccines in that lot may be expired, or the vaccines in that lot may have been recalled.

Inventory Alerts

The Inventory Alerts screen is displayed when you click on Manage Inventory under Inventory on the menu panel. The top table on this screen, Vaccine Order/Transfer Notification, updates you on the status of vaccine orders and transfers. The next table, Active Inventory That is Going to Expire, lists vaccines at each site that will expire within 60 days.



Vaccines on the Inventory screen that are highlighted in **pink** will expire within 30 days.

The bottom tables on the same screen list, by vaccine group and trade name, inventory that is nearly depleted.

Updating Inventory Alert Preferences

Always check existing inventory before adding a new lot. If a lot already exists, add the new inventory to the existing lot.

To change system options for expiration alerts and low inventory alerts, follow these steps:

1. Click on **Manage Inventory** under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press **UPDATE ALERT PREFS**.
3. In the Inventory Expiration Alerts section, enter the number of days prior to the expiration of the vaccine lot within which you wish to be notified.
4. To enter a low-level alert for all vaccine groups or trade names, select whether you wish to update the low-level alerts by trade name or by vaccine group in the Update Low-Level Alert Defaults section. Then enter the number of doses at

which NESIIS will indicate that the inventory is running low.

5. To update the NESIIS low-level alerts for each vaccine group, enter the number of doses that will indicate that the inventory is running low for each vaccine group listed. You may enter the number in either the combined column (indicating for both public and private sources), the public column, or the private column.
6. To update the NESIIS low-level alerts for each vaccine trade name, do the following:
   - Click on the desired vaccine group name, which appears underlined and in blue.
   - Enter the number of doses that will indicate that the inventory is running low for each trade name listed on the Update Low-Level Alerts by Trade Name screen. You may enter the number in either the combined column (indicating for both public and private sources), the public column, or the private column.
   - Press **SAVE**.
7. Press **SAVE**. If the new preferences were saved successfully, the message "Updated Alert Preferences" will appear at the top of the screen.
8. To restore all inventory alerts to NESIIS system defaults, press **RESET TO DEFAULT**. Press **OK**.
9. To return to the Manage Inventory screen, press **CANCEL**.

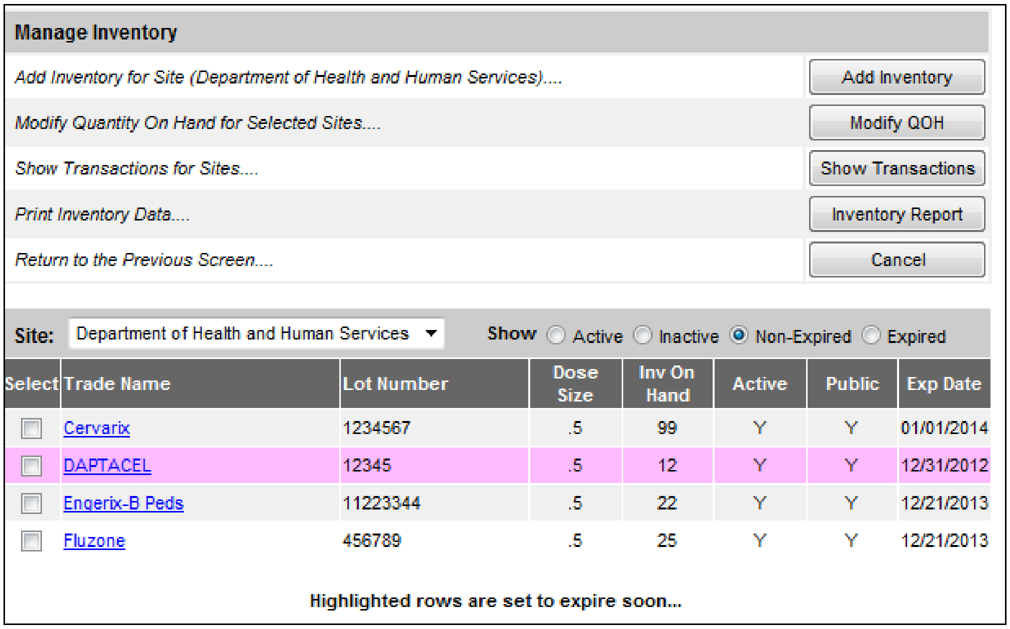
Viewing Inventory

To view the vaccine inventory at a particular site, follow these steps:

1. Click on **Manage Inventory** under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press **SHOW INVENTORY**.
3. The inventory table shown by default will include vaccines from one site within the organization and will include non-expired active and inactive vaccines. Following is a description of all options available:
   - **Active**: Select the 'Active' option to view only those vaccine lots that have valid (non-expired) doses remaining in the site's inventory.
   - **Inactive**: Select the 'Inactive' option to view only those vaccine lots that have either no remaining doses or have expired.
   - **Non-Expired**: Select the 'Non-Expired' option to view any active or inactive inventory that has not yet expired.
   - **Expired**: Select the 'Expired' option to view any inventory that has expired.

   To view inventory at a different site, view active or inactive vaccines only, or view expired vaccines:

   - Select the site name from the Site pick list.
   - If desired, choose Active or Inactive by clicking on the appropriate radio button ().
   - If desired, choose Expired by clicking the appropriate radio button.



The following is an explanation of the columns in the inventory table:

Select: A mark in this checkbox allows you to modify the quantity of the selected vaccine or add inventory for the selected vaccine type.

Trade Name: This column gives the vaccine's trade name.

Lot Number: This column lists the lot number of the vaccine.

Inv On Hand: This column lists the number of doses remaining in the site's inventory.

Active: A "Y" in this column indicates the inventory is active (available for use). An "N" indicates the vaccine is inactive (unavailable for use because the vaccine has expired, the quantity has been used, or the inventory item was set to inactive). Inactive vaccines are shown in red type.

Public: A "Y" in this column indicates public funding was used to purchase the vaccine. An "N" indicates that the vaccine was privately purchased.

Exp Date: This column gives the vaccine's expiration date. Vaccines that will expire in 60 days or less are highlighted in pink.

Printing Inventory

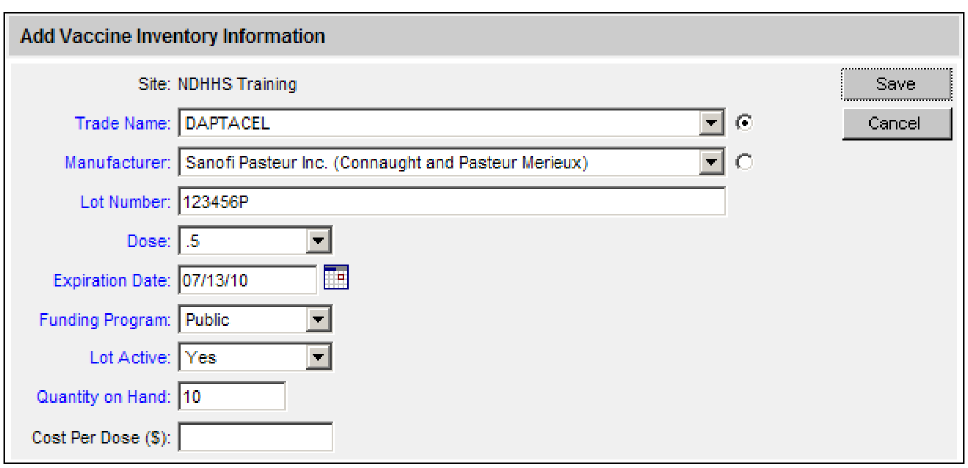
To print out a list of inventory at a particular site, follow these steps:

1. Follow Steps 1-3 under *Viewing Inventory.*
2. Click anywhere on the page.
3. Do one of the following:
    - Choose **File**, then **Print**, from your browser's menu bar. In the Print dialog box, press **OK**.
    - Or, press the printer icon () on your browser's toolbar.
4. If your printout is cut off, try setting your printer to landscape.

Adding New Inventory

Use the Add Vaccine function only if you are adding a vaccine with a *new* lot number. If you are adding a vaccine with a lot number that already exists in your inventory, refer to *Updating Inventory.*

1. Click on **Manage Inventory** under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press **SHOW INVENTORY**.
3. At the next screen, choose the site to which you will be adding inventory from the Site pick list.
4. Press **ADD INVENTORY**.
5. At the Add Vaccine Inventory Information screen, do the following:



- Verify that the site at which the inventory will be located is listed under Site.
- Choose the vaccine's trade name from the pick list provided.
- Enter the lot number of the vaccine in the Lot Number text box.

- Choose the dose from the Dose pick list; choose from .25, .5, etc.
- Enter the vaccine lot's expiration date. 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**. If no day is specified on the vaccine, enter the last day of the month.
- Choose the source of funding (public or private) used for the purchase of the vaccine from the pick list.
- Choose Yes from the Lot Active pick list. When adding new inventory, the lot may only be entered as active. This controls whether the lot shows up on pick lists.
- Enter the number of vaccine doses received in the Quantity on Hand text box.
- Enter the cost per dose of the vaccine, if desired, in the Cost Per Dose field.

6. Press **SAVE**.
7. If the new vaccine was saved successfully, the message "Inventory was inserted successfully" will appear at the bottom of the screen.
8. To add additional vaccines, press **ADD NEW**.
9. To return to the Show Inventory screen, press **CANCEL**.

Updating Inventory

To change information on existing vaccines, follow these steps:

1. Click on **MANAGE INVENTORY** under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press **SHOW INVENTORY**.
3. The inventory table shown by default will include vaccines from one site within the organization and will include both active and inactive vaccines. Following is a description of all options available:
   - **Active**: Select the 'Active' option to view only those vaccine lots that have valid (non-expired) doses remaining in the site's inventory.
   - **Inactive**: Select the 'Inactive' option to view only those vaccine lots that have either no remaining doses or have expired.
   - **Non-Expired**: Select the 'Non-Expired' option to view any active or inactive inventory that has not yet expired.
   - **Expired**: Select the 'Expired' option to view any inventory that has expired.

To view inventory from a different site and/or active or inactive vaccines only:

- Select the site name from the Site pick list.
- If desired, choose Active or Inactive by clicking on the appropriate radio button ( ).
- If desired, choose Expired by clicking the appropriate radio button.

4. Once the appropriate site's inventory displays, select the vaccine lot you wish to update by clicking on the vaccine's trade name, which is underlined and in blue.

5. On the next screen, make desired changes to the Manufacturer, Trade Name, Lot Number, Dose, Expiration Date, Funding Program, Lot Active, or Cost Per Dose fields for each vaccine lot. These fields may be edited only if the vaccine has not yet been administered.
6. To modify the quantity of doses on hand, enter the following information:
   - Under Action, choose whether you would like to add to or subtract from the inventory on hand.
   - Under Amount, enter the quantity of inventory to be added or subtracted.

   Choose an explanation for changing the quantity of the vaccine lot by selecting from the Reason pick list.

   Reasons for adding or subtracting inventory:

   Receipt of inventory*:* Use this reason when you are adding new inventory to a particular lot.

   Error correction*:* Use this reason when adding to or subtracting from inventory doses that were incorrectly entered or when getting extra or fewer doses from a vial.

   Doses returned*:* Use this reason when adding inventory to a particular lot because vaccines were returned from another site.

   Doses transferred*:* Use this reason when subtracting inventory that's been transferred to another site.

   Doses wasted*:* Use this reason when inventory is subtracted because of broken vials, faulty injections, etc.
7. Press **SAVE**.
8. Once your updates are saved to the system's database, the message "Inventory was updated successfully" will appear at the bottom of the screen.
9. Press **CANCEL** to return to the Show Inventory screen.

Deleting Vaccine Lots

Vaccine lots may only be deleted if there are no immunizations, pending transfers, or transactions attached to the lot. To delete an entire vaccine lot from inventory, follow these steps:

1. Follow Steps 1-4 under Updating Inventory.
2. To delete the entire vaccine lot, press **DELETE**.
3. Press **OK**.

Modifying Quantities of Multiple Vaccines

To change inventory quantities of multiple vaccine lots, follow these steps:

1. Follow Steps 1-3 under Updating Inventory.
2. Once the appropriate site's inventory displays, put a check mark next to the vaccine lots whose quantities you want to modify.
3. Press **MODIFY QUANTITY**.
4. On the Modify Quantity screen, enter the following information:
   - Under Action, choose whether you would like to add to or subtract from the inventory on hand.
   - Under Amount, enter the quantity of inventory to be added or subtracted.
   - Choose an explanation for changing the quantity of the vaccine lot by selecting from the Reason pick list. Refer to the list on the previous page for a description of the reasons for adding or subtracting inventory.
5. Press **SAVE**.

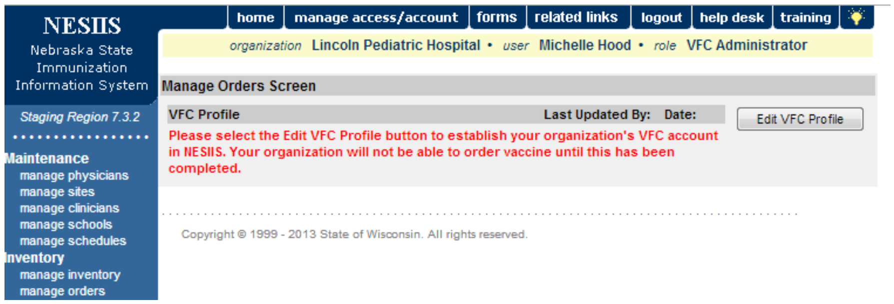
Ordering inventory

Edit VFC profile

<u>Note</u>: If you are the first time user, please select the Edit VFC Profile button to establish your organization's VFC account in NESIIS. Your organization will not be able to order vaccine until this has been completed.

1. Click on Manage Vaccine Orders link.

2. Click on **Edit VFC Profile**:

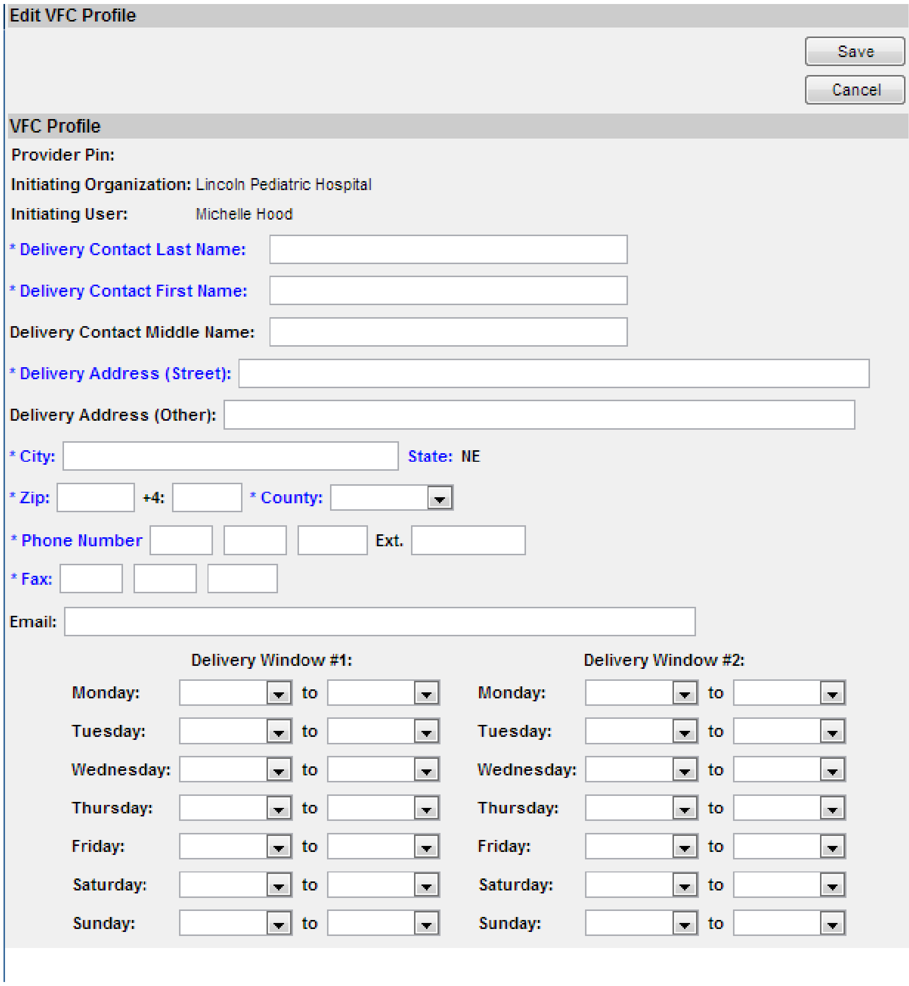


3. On the next screen, please verify the following (**note:** all the fields shown in **blue** are required):

- **Delivery Contact Last Name**
- **Delivery Contact First Name**
- **Delivery Address(Street),City, Zip, County,**
- **Phone number**
- **Fax**
- **Delivery Window#1** (If day of week is not entered, it is assumed it the organization is closed on that date.)
- **Delivery Window #2** :(If Delivery Window 2 is left blank, it's assumed that there was no break in Delivery Window 1 entry)

NOTE:

- Delivery times can be split between Window #1 and Window #2 (example: 8:00 am to 12:00pm 1:00pm – 5:00 pm).
- If times are not entered for any given day, it will be assumed that your organization is closed or not accepting shipments on that day.



If anything needs to be updated or changed, please do that now.

4. Click **SAVE** when finished.

If you have any question related to this matter, please call 800-798-1696 or 402-471-6423

Create vaccine Order

1. Click on **MANAGE VACCINE ORDERS**.

2. Click on **CREATE ORDER**.


Manage Orders Screen

VFC Profile — Last Updated By: *Michelle Hood* Date: *05/21/2013*

Edit VFC Profile

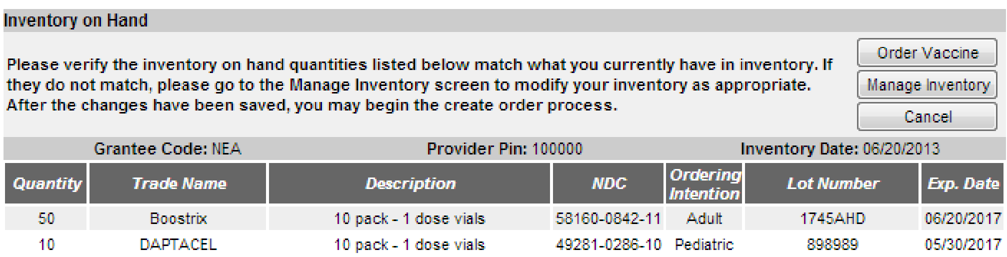
Create Order

Provider Pin: 100000
Initiating Organization: Lincoln Pediatric Hospital
Initiating User: Michelle Hood
Status: Active
Delivery Contact Last Name: Nuss
Delivery Contact First Name: Mike
Delivery Contact Middle Name:
Delivery Address (Street): 12458 Delivery St
Delivery Address (Other):
City: Lincoln
State: NE **Zip:** 68522 **+4:** **County:** Lancaster
Telephone: (402) 123-4567 **Extension:**
Fax: (402) 789-1234
Email:

Delivery Hours ▲

Please verify the inventory on hand quantities match what you currently have in inventory. If they do not match, please go to the Manage Inventory screen to modify your inventory as appropriate. After the changes have been saved, you may begin the create order process.

3. Click on **ORDER VACCINE**


Inventory on Hand

Please verify the inventory on hand quantities listed below match what you currently have in inventory. If they do not match, please go to the Manage Inventory screen to modify your inventory as appropriate. After the changes have been saved, you may begin the create order process.

Order Vaccine

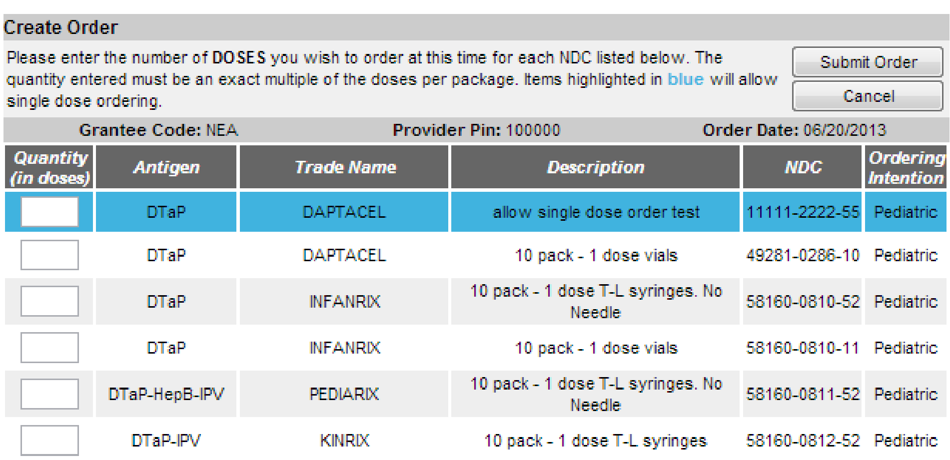
Manage Inventory

Cancel

Grantee Code: NEA **Provider Pin:** 100000 **Inventory Date:** 06/20/2013

Quantity	Trade Name	Description	NDC	Ordering Intention	Lot Number	Exp. Date
50	Boostrix	10 pack - 1 dose vials	58160-0842-11	Adult	1745AHD	06/20/2017
10	DAPTACEL	10 pack - 1 dose vials	49281-0286-10	Pediatric	898989	05/30/2017

4. Enter the number of DOSES you wish to order at this time for each NDC listed below. The quantity entered must be an exact multiple of the doses per package. Items highlighted in blue will allow single dose ordering.


Create Order

Please enter the number of **DOSES** you wish to order at this time for each NDC listed below. The quantity entered must be an exact multiple of the doses per package. Items highlighted in blue will allow single dose ordering.

Submit Order

Cancel

Grantee Code: NEA **Provider Pin:** 100000 **Order Date:** 06/20/2013

Quantity (in doses)	Antigen	Trade Name	Description	NDC	Ordering Intention
	DTaP	DAPTACEL	allow single dose order test	11111-2222-55	Pediatric
	DTaP	DAPTACEL	10 pack - 1 dose vials	49281-0286-10	Pediatric
	DTaP	INFANRIX	10 pack - 1 dose T-L syringes. No Needle	58160-0810-52	Pediatric
	DTaP	INFANRIX	10 pack - 1 dose vials	58160-0810-11	Pediatric
	DTaP-HepB-IPV	PEDIARIX	10 pack - 1 dose T-L syringes. No Needle	58160-0811-52	Pediatric
	DTaP-IPV	KINRIX	10 pack - 1 dose T-L syringes	58160-0812-52	Pediatric

5. Once complete, select the **SUBMIT ORDER** button.

Modify Vaccine Order

Note: VFC Administrators will have the ability to modify their orders IF they have not yet been approved or rejected by the NDHHS. VFC Administrators can also cancel an entire vaccine order in NESIIS IF they have not yet been approved or rejected by the NDHHS. All orders in a Pending status on the Manage Orders screen fit these criteria. If an order has been accepted or rejected by the NDHHS, the status on the Manage Orders screen will display a message other than Pending. Users can select the Order ID hyperlink to navigate to the View Order screen. The order details will be provided however; they will not have the ability to change vaccine order quantities or cancel the order.

1. To modify your order, click on manage vaccine order, and then click on the **ORDER ID** hyperlink.

From: 03/22/2013 To: 06/20/2013 Refresh

Current Orders

Order ID	User	Submit Date	Order Status
156	Michelle Hood	06/20/2013	PENDING
132	Michelle Hood	05/30/2013	SENT TO DISTRIBUTOR
110	Michelle Hood	05/23/2013	SENT TO DISTRIBUTOR

Denied Orders

Order ID	User	Submit Date	Order Status

2. To modify your order, enter the correct number of DOSES you would like to order in the **QUANTITY** field. If you no longer want to order a specific vaccine, enter "0" in the **QUANTITY** field. Once complete, select the **RE-SUBMIT ORDER** button to forward your order to the VFC Program.

Modify Order **Order ID:** 156

To modify your order, enter the updated Quantity requested. If you no longer would like to order a specific vaccine, enter "0" in the Quantity field. You may also add items to your order by entering the number of DOSES requested in the Quantity field. Once complete, select the Re-submit Order button to forward to the VFC Program.

Print | Re-submit Order | Cancel Order | Cancel

Order Status: PENDING **Provider Pin:** 100000 **Order Date:** 06/20/2013

Quantity (in doses)	*Antigen*	*Trade Name*	*Description*	*NDC*	*Ordering Intention*
6	DTaP	DAPTACEL	allow single dose order test	11111-2222-55	Pediatric
10	DTaP	DAPTACEL	10 pack - 1 dose vials	49281-0286-10	Pediatric

Other items that can be added to this order

Quantity (in doses)	*Antigen*	*Trade Name*	*Description*	*NDC*	*Ordering Intention*
	DTaP	INFANRIX	10 pack - 1 dose T-L syringes. No Needle	58160-0810-52	Pediatric
	DTaP-HepB-IPV	PEDIARIX	10 pack - 1 dose T-L syringes. No Needle	58160-0811-52	Pediatric
	DTaP-IPV	KINRIX	10 pack - 1 dose vials	58160-0812-11	Pediatric
	DTaP-IPV	KINRIX	10 pack - 1 dose T-L syringes	58160-0812-52	Pediatric

Cancel Vaccine Order

1. Selecting this button will cancel the entire vaccine order. To cancel your order, click on **MANAGE VACCINE ORDER**

2. Then, click on the **ORDER ID** hyperlink..

From: 03/22/2013 To: 06/20/2013 Refresh

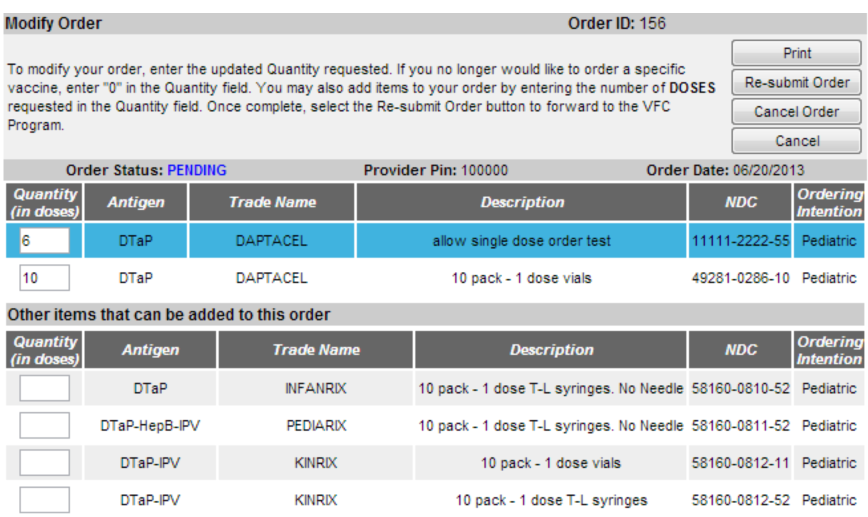
Current Orders

Order ID	User	Submit Date	Order Status
156	Michelle Hood	06/20/2013	PENDING
132	Michelle Hood	05/30/2013	SENT TO DISTRIBUTOR
110	Michelle Hood	05/23/2013	SENT TO DISTRIBUTOR

Denied Orders

Order ID	User	Submit Date	Order Status

3. On the next screen, click on **CANCEL ORDER.**



Modify Order **Order ID:** 156

To modify your order, enter the updated Quantity requested. If you no longer would like to order a specific vaccine, enter "0" in the Quantity field. You may also add items to your order by entering the number of DOSES requested in the Quantity field. Once complete, select the Re-submit Order button to forward to the VFC Program.

Print | Re-submit Order | Cancel Order | Cancel

Order Status: PENDING **Provider Pin:** 100000 **Order Date:** 06/20/2013

Quantity (in doses)	Antigen	Trade Name	Description	NDC	Ordering Intention
6	DTaP	DAPTACEL	allow single dose order test	11111-2222-55	Pediatric
10	DTaP	DAPTACEL	10 pack - 1 dose vials	49281-0286-10	Pediatric

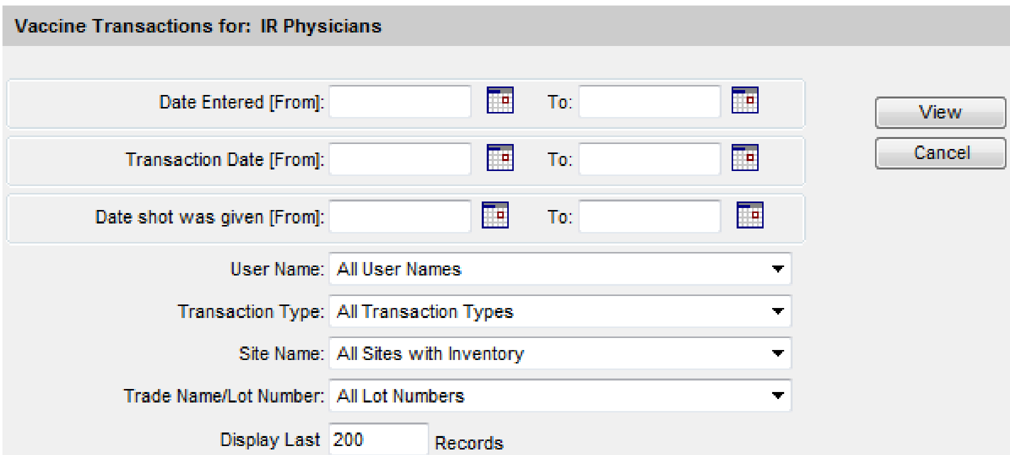
Other items that can be added to this order

Quantity (in doses)	Antigen	Trade Name	Description	NDC	Ordering Intention
	DTaP	INFANRIX	10 pack - 1 dose T-L syringes. No Needle	58160-0810-52	Pediatric
	DTaP-HepB-IPV	PEDIARIX	10 pack - 1 dose T-L syringes. No Needle	58160-0811-52	Pediatric
	DTaP-IPV	KINRIX	10 pack - 1 dose vials	58160-0812-11	Pediatric
	DTaP-IPV	KINRIX	10 pack - 1 dose T-L syringes	58160-0812-52	Pediatric

4. The order status will display Cancelled on the Manage Orders Screen.

Viewing Inventory Transactions

1. Click on **MANANGE INVENTORY** under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press **SHOW TRANSACTIONS**.
3. At the Vaccine Transactions screen, do the following:



- Enter the From and To dates for when the immunizations were entered in NESIIS.
- Or, enter the From and To dates for when the transaction were entered in NESIIS.
- Or, enter the From and To dates for when the immunizations were given.
- Choose a specific user name or All User Names from the User Name pick list.
- Choose a specific transaction type or All Transaction Types. These transactions relate to the Reason pick list on the Edit Vaccine Inventory Information screen.

  Transaction types:

  ***Receipt of Inventory (REC)**:* This type indicates vaccines were added as new inventory.

  ***Error Correction (ERR)**:* This type indicates vaccines were added or subtracted to correct a previous error or after getting extra or fewer doses from a vial.

  ***Doses Returned (RET)**:* This type indicates vaccines were added to inventory after being returned from another site or organization.

  ***Doses Transferred (TRA)**:* This type indicates vaccines were subtracted due to transfer to another site or organization.

  ***Doses Wasted (WAS)**:* This type indicates vaccines were subtracted from inventory because they were wasted through faulty injections, broken vials, improper refrigeration, etc.

Immunization Given (Immunize): This type indicates vaccines were subtracted from inventory because of immunizations given.

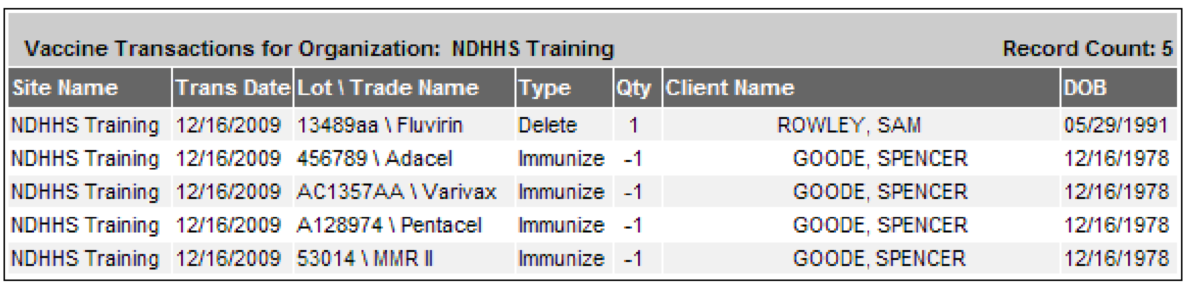
Immunization Deleted (Delete): This type indicates vaccines were added to inventory because they were deleted from a client's record.

- Select the inventory site whose transactions you wish to view or choose All Sites with Inventory.
- Choose the trade name, lot number, public/private, and site from the Trade Name/Lot Number pick list or choose All Lot Numbers from the list.
- Enter the quantity of records you wish to view in the Display Last <#> Records field.

4. Press **VIEW**.
5. The Vaccine Transactions screen will then display.

Vaccine transactions

The top chart on the Vaccine Transactions screen gives the following information:



Vaccine Transactions for Organization: NDHHS Training						Record Count: 5
Site Name	Trans Date	Lot \ Trade Name	Type	Qty	Client Name	DOB
NDHHS Training	12/16/2009	13489aa \ Fluvirin	Delete	1	ROWLEY, SAM	05/29/1991
NDHHS Training	12/16/2009	456789 \ Adacel	Immunize	-1	GOODE, SPENCER	12/16/1978
NDHHS Training	12/16/2009	AC1357AA \ Varivax	Immunize	-1	GOODE, SPENCER	12/16/1978
NDHHS Training	12/16/2009	A128974 \ Pentacel	Immunize	-1	GOODE, SPENCER	12/16/1978
NDHHS Training	12/16/2009	53014 \ MMR II	Immunize	-1	GOODE, SPENCER	12/16/1978

Trans Date: Vaccines are next sorted numerically by transaction date; the most recent transactions are shown first.

Lot/Trade Name: The lot number and trade name of the vaccine are listed in this column.

Type: Refer to Transaction Types in this chapter for an explanation of the transaction codes shown in this column.

Qty: The number in this column indicates the quantity added to or subtracted from inventory due to the listed transaction.

Client Name: The client name column indicates the client associated with the transaction, if applicable.

DOB: The date of birth of the client is indicated in this column, if applicable.

Transaction totals

The chart at the bottom of the Vaccine Transactions screen gives a breakdown of transactions by transaction type.

Vaccine Transactions Totals			
Trans Code	Trans Description	Trans Count	Trans Value
REC	Receipt of Inventory	0	0
Immunize	Immunizations Given	4	-4
Delete	Immunizations Deleted	1	1
TRA	Doses Transferred	0	0
WAS	Doses Wasted	0	0
RET	Doses Returned	0	0
ERR	Error Correction	0	0
	Transaction Totals:	5	-3

Trans Code: This column displays the abbreviated code that identifies the transaction type.

Trans Description: This column displays the full transaction type.

Trans Count: This column represents the number of times a particular transaction type was performed within the dates you specified. For example, if your organization received two lots of vaccines within the one-week period of time you specified, the Trans Count would show "2" in the Receipt of Inventory row.

Trans Value: This column shows the quantity of doses added or subtracted by transaction type. For example, if you received a combined 103 doses in the two vaccine lots you added to inventory, "103" would show in the Trans Values column on the Receipt Inventory row.

Printing Inventory Transactions

To print out a list of vaccine transactions, follow these steps:

1. Follow Steps 1-4 under *Viewing Inventory Transactions.*
2. Click anywhere on the page.
3. Do one of the following:
   - Choose **File**, then **Print**, from your browser's menu bar. In the Print dialog box, press **OK**.
   - Or, press the printer icon () on your browser's toolbar.
4. If your printout is cut off, try setting your printer to landscape.

Creating Transfers

NESIIS allows you to transfer vaccines between sites within your organization or between two organizations. To create a transfer, follow these steps:

1. Click on **MANAGE TRANSFERS** under the Inventory section of the menu panel.
2. Press **NEW TRANSFER**.

3. Enter the following information:
   - The sending site from which you will be taking the vaccine.
   - The internal receiving site or the external receiving organization to which you are transferring the vaccine.
   - Choose between active/non-expired or inactive/expired vaccines by clicking the appropriate radio button ( ).
   - The number of doses in the Transfer Quantity field for each of the trade names being transferred.
4. Press **SAVE**.
5. Press **PACKING LISTS** or **LABELS**, if desired. Press **SHIP** when ready to ship the vaccines. Either use today's date or enter an alternate date in MMDDYYYY format. Press **SHIP**. The transfer will then be moved to the Outbound Transfer list, where it will remain until it is accepted by the receiving site/organization.
6. To complete an internal transfer without printing shipping documents, press **FINISH TRANS**. The ship and receive dates will be set to the current date. The inventory affected by the transfer will be directly added to the internal receiving site's inventory and deducted from the sending site's inventory.

Shipping Documents

If your organization has sent a transfer, you can view and print the packing list and shipping labels associated with the transfer. The packing list and label can be generated immediately after a transfer has been created (see Creating Transfers in this chapter), or by using the following feature:

1. Click on **SHIPPING DOCUMENTS** under the Inventory section of the menu panel.
2. Press **PACKING LISTS** or **LABELS**. Print labels and/or packing list, if desired.
3. Enter a ship date if different from today's date, using MMDDYYYY format.
4. Press **SHIP**. Press **OK**.

Accepting or Rejecting Shipments

Orders and transfers made through NESIIS and received by the provider organization must be accepted, rejected, or partially accepted so that NESIIS can post and track inventory properly. To accept or reject an order or transfer in NESIIS, follow these steps:

1. Click on **MANAGE TRANSFERS** under the Inventory section of the menu panel.
2. The Manage Transfer screen categorizes transfers as follows:
   - **Outbound Transfer**: Displays transfers that are outbound from your organization.
   - **Inbound Transfer**: Displays transfers that are inbound to your organization.
   - **Historic Transfer**: Displays completed transfers.

To view the actual order sent to the DPH, click the blue, underlined “Order” under Type of Transfer.

3. To proceed to the Receive Transfers screen (on which you may accept or reject orders and transfers), click on the date underlined in blue in the Create Date column which corresponds with the transfer you wish to receive.
4. At the Receive Transfer screen, you may accept the entire transfer, Reject the entire transfer, or Partially Accept some of the transfer, while rejecting the remainder.

Accept Transfer: To accept the entire transfer, press **ACCEPT TRANSFER**, Press **OK** to accept the transfer and add all transfer items into inventory.

Reject Transfer: To reject the entire transfer, press **REJECT TRANSFER**. Select a reason for the rejection: Damaged, Not Wanted, Wrong Vaccine, or Never Received. After selecting a reason, press **REJECT**. Press **OK** to continue with the rejection and be returned to the Manage Transfers screen

Partially Accept: To accept part of the shipment, press **PARTIALLY ACCEPT**. At the Partially Accept Transfer screen, select the amount of the vaccines you wish to accept and a rejection reason for those you wish to reject. Press **SAVE**.

Shipping and Restocking Transfers

When an order or transfer has been rejected with a reason code of Not Wanted, Wrong Vaccine, or Never Received, it is necessary to ship and restock transfers in the system so that they are correctly reported in inventory.

Shipping Back a Rejected Transfer

If you are the receiving site of a transfer or order that you reject, you must ship the rejected quantities back to the original sender. To do this, follow these steps:

1. Click on **MANAGE TRANSFERS** under the Inventory section of the menu panel.
2. Click on the appropriate transfer date, underlined and in blue, under the Create Date column.
3. Enter a return ship date at the Ship Return Transfer screen by entering the date in MMDDYYYY format. Press **SHIP**.

Accepting a Rejected Transfer

If you are the original sender of a transfer or order, and the receiving organization has rejected the shipment and shipped it back to you, you will need to restock the rejected quantities in the system. To do this, follow these steps:

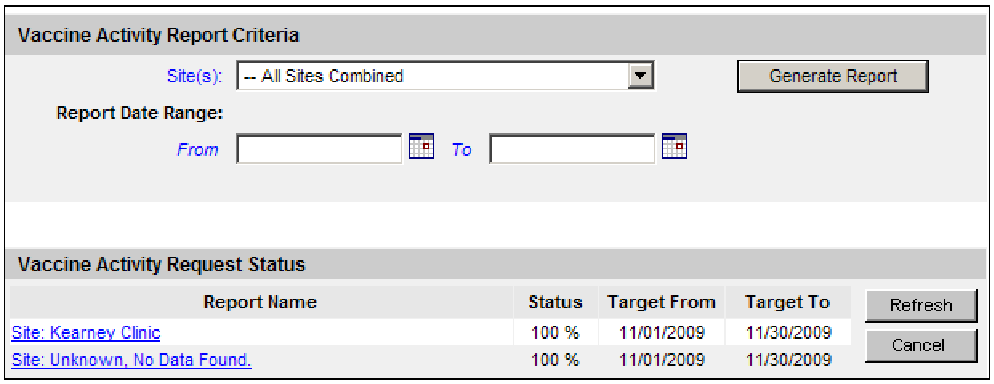
1. Click on **MANAGE TRANSFERS** under the Inventory section of the menu panel.

2. Click on the transfer date of the rejected transfer, underlined and in blue, under the Create Date column.
3. Press **SAVE** at the Restock Rejected Transfer screen. The Manage Transfer screen will display, and the transfer will be added to the Historical section of the screen.

Vaccine Activity Reports

The Vaccine Activity Report will give you information on how many doses of each vaccine have been given, by age, within a specified date range. To generate a vaccine activity report for one site or all sites in your organization, follow these steps:

1. Click on **VACCINE ACTIVITY** under the Inventory section of the menu panel.



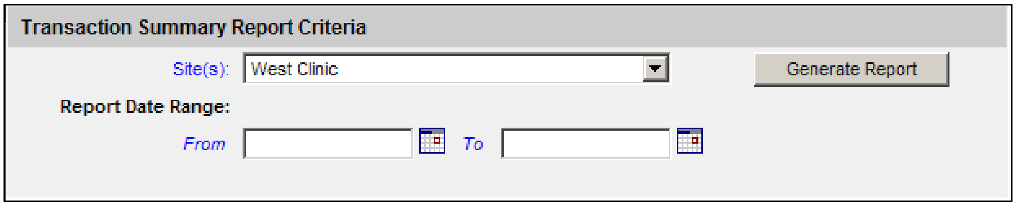
2. At the Vaccine Activity Report Criteria screen, choose a site from the pick list or choose All Sites Combined.

3. In the From field under Report Date Range, choose a starting date for your report using the MMDDYYYY format.
4. In the To field under Report Date Range, choose an ending date for your report using the MMDDYYYY format.
5. Press **GENERATE REPORT**.
6. Press **REFRESH** after a few moments to check the status of your report.
7. Click on the name of your report once it is underlined and displays in blue type.
8. The report displays in Adobe® Reader®.
9. To print the report, press the printer icon ( ) on the Adobe® toolbar.
10. Press **OK** in the Print dialog box.
11. To return to the Vaccine Usage screen, press the **BACK** button ( ) on your browser.

Transaction Summary Reports

The Transaction Summary Report will give you information on how many doses of each vaccine have been given within a specified date range. The report also gives information on how many doses were expired, transferred, received, restocked, wasted, or given in error. To generate a transaction summary report for one site or all sites in your organization, follow these steps:

1. Click on **TRANSACTION SUMMARY** under the Inventory section of the menu panel.



2. At the Transaction Summary Report Criteria screen, choose a site from the pick list or choose All Sites Combined.
3. In the From field under Report Date Range, choose a starting date for your report using the MMDDYYYY format.
4. In the To field under Report Date Range, choose an ending date for your report using the MMDDYYYY format.
5. Press **GENERATE REPORT**.
6. The report displays in Adobe® Reader®.
7. To print the report, press the printer icon ( ) on the Adobe® toolbar.
8. Press **OK** in the Print dialog box.
9. To return to the Transaction Summary screen, press the **BACK** button ( ) on your browser.

10 Managing Clients

In this chapter:

Finding Clients

Use of Pick Lists in NESIIS

Editing/Entering Client Information

Saving Client Information

Manage Client vs. Manage Immunizations

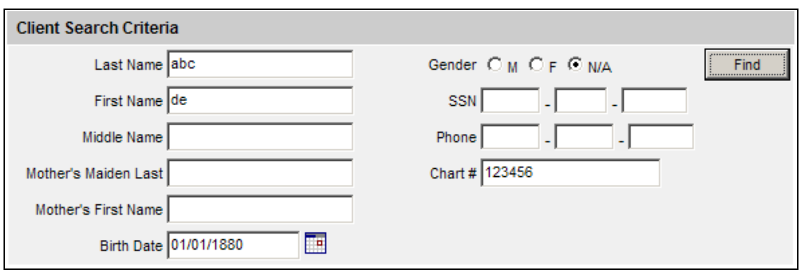
Manage Client and Manage Immunizations are the same query; in other words, they both utilize the client search function. The difference is that the Manage Client query will display the Manage Client screen, which consists of the client's demographic information, responsible person(s), etc., while the 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 de-duplicate (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. It is recommended that you supply three characters of the client's last name and two 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.



- **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. 10.5 for information on clients with no first name.

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.

- **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.

Last Name	First Name	Middle Name	Birth Date	Chart #	Mother's Maiden First	Mother's Maiden Last	Gender	Telephone
EXAMPLE	MARY		12/16/1971				U	
EXAMPLE	MARYBETH		11/15/1916	654321	SHARON	RULE	F	444-5555

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.

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:

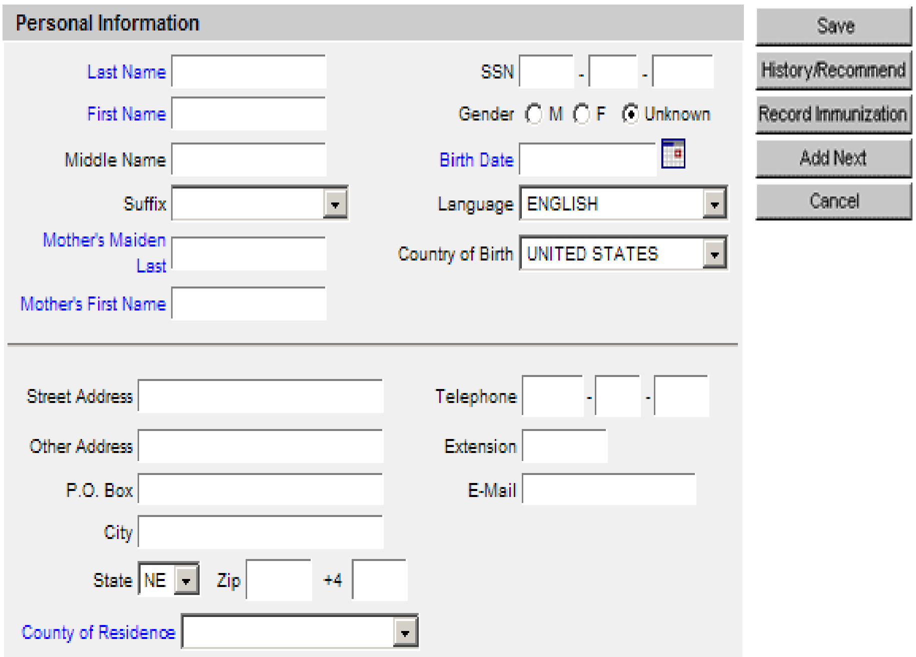
- **Ease of use**. Pick lists allow users to quickly fill in a data field without typing in the information.
- **Health Level 7 (HL7) compliant**. HL7 is a method of categorizing data so that it is uniform across all health reporting systems. This standardization allows providers using different systems 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 five parts: personal information header, client information tab, responsible person(s) tab, client comment(s) tab, and screening questions 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.



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 de-duplication.
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 de-duplication.
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.

   Note: **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.

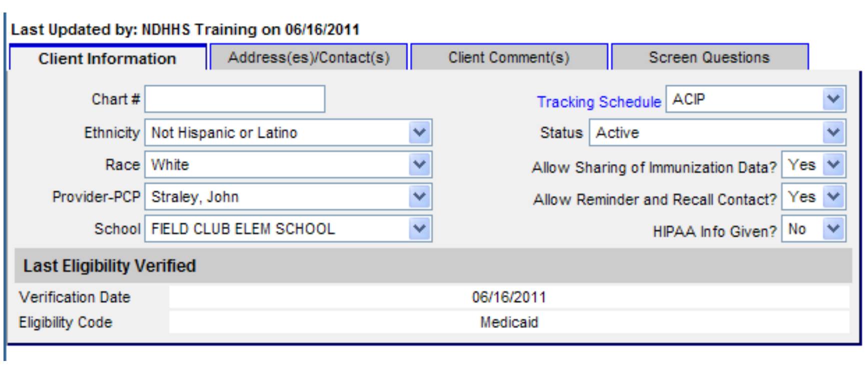
10. **Street Address/ Other Address/ P.O. Box**: These fields are optional. Street Address/ Other Address/ P.O. Box fields are pertinent to the client.
11. **City**: The city field is optional and pertinent to the client.
12. **State**: The state field is optional. The drop down arrow will allow you to pick the state in which you reside.
13. **Zip**: The zip field is optional and pertinent to the client.
14. **County of Residence**: Required field. NESIIS will allow you to save the record without this field completed.
15. **Telephone/Extension**: Telephone/extension fields are optional and they are pertinent to the client.
16. **Email**: The email field is optional.
17. **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. **HIPAA Info Given**: Allows you to track whether HIPAA information was given to the client, or not.

Address(es)/Contact 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.

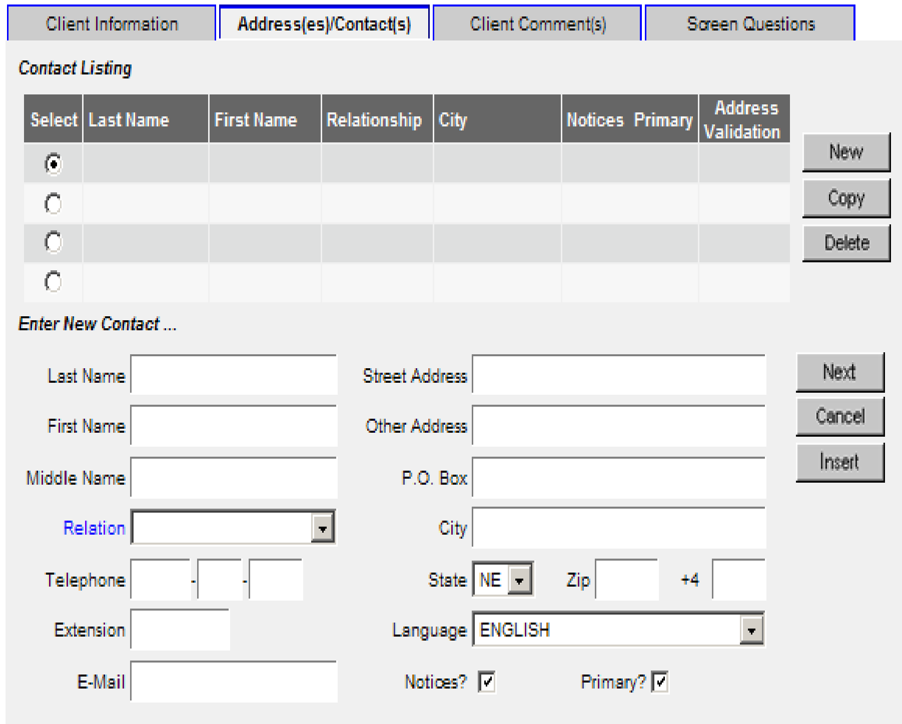
Most organizations that select Active for a status but have not yet administered an immunization to the client will have their status display as a blank. Once one of these organizations administers an immunization to the client, the status will display as Active. For organizations with a separate Memorandum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

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.

1. Click on the **Address(es)/Contact** tab.



2. To edit an existing Address(es)/Contact, 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 Adress(es)/Contact, 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.

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.

- **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 contact:

1. Select the radio button ( ) next to the contact 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 contact:

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

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.

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.

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.

Using the insert button:

Using the insert button allows you to copy the Clients address into the contact address fields:

a. Press **INSERT**

b. The address of the client from the Personal Information Screen will be copied into the responsible person record.

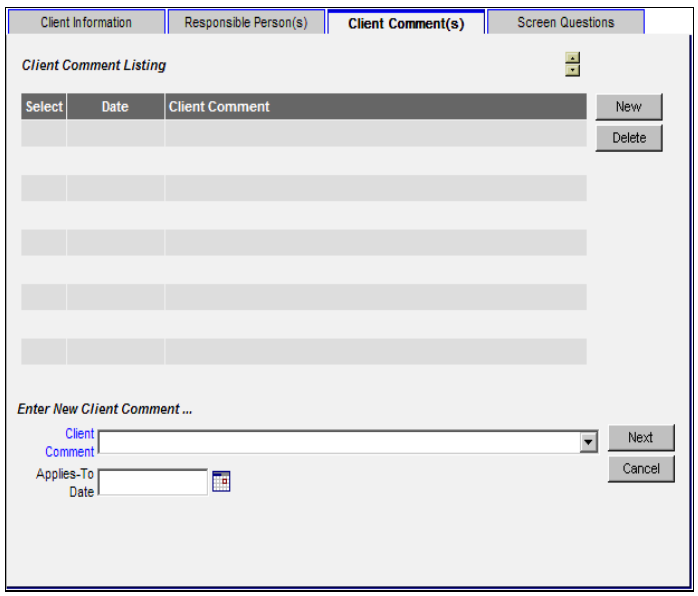
c. If any information needs to be edited, type over as it were a word document.

d. Press **NEXT** to save record.

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.



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.

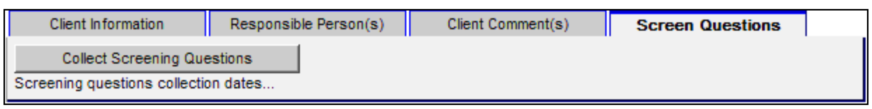
Deleting an existing comment

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.

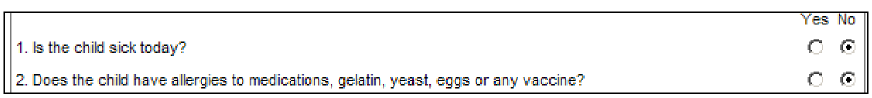
Screening Questions Tab

The Screening Questions tab allows you to enter and save answers to the screening questions into the client's record. You can store these answers for historical purposes as well as print them off when needed.

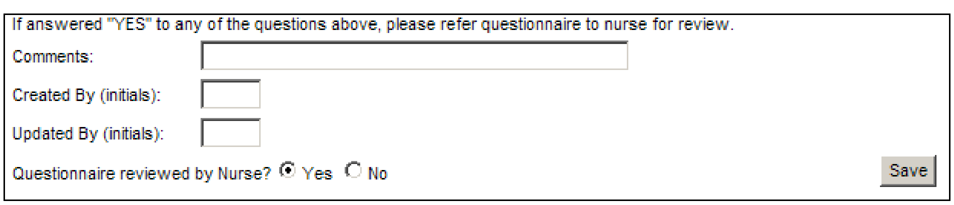
1. Click on the **Screen Questions** tab



2. Click on **COLLECT SCREENING QUESTIONS** and answer each question (as appropriate) by clicking in the "yes", "no", of "NA" circle.



3. "Yes" answers will pop up comments boxes to help you determine whether the client should receive immunizations or not that day.
4. After answering all the appropriate screening questions, comments may be added to this record and the person recording these answers must enter their initials in to the "Created By (initials)" box at the bottom of the page.



5. Press the **SAVE** button when finished.
6. Each set of screening questions can be revised ONE time. The person making the revisions must enter their initials in the "Updated By (initials)" box then press **SAVE** to save those changes.

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 ad 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 (12) 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.
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.

De-duplicating 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 NESIIS 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 NESIIS, neither of which will be complete and accurate!

Create New Client

Possible Client Matches:1

Last Name	First Name	Birth Date	Chart #	Mother's Maiden First	Mother's Maiden Last	Gender	Telephone
EXAMPLE	FRANKLIN	04/02/1972		ELAINE	SMITH	M	

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.

11 Managing Immunizations

In this chapter:

The Immunization History screen contains a large amount of useful information. If, for this reason, you wish to print this screen, please use either the **PRINT** or the **PRINT CONFIDENTIAL** button on the Immunization History screen to print this page; using the **PRINT** button will display the page without top and side NESIIS menus, and using the **PRINT CONFIDENTIAL** button will display the page without menus and without the patient's confidential information.

The immunization function of NESIIS allows you to view and manage historical immunization information and add immunizations for the client. It also recommends immunizations based on a tracking schedule.

Immunization information for a specific client may be accessed one of two ways:

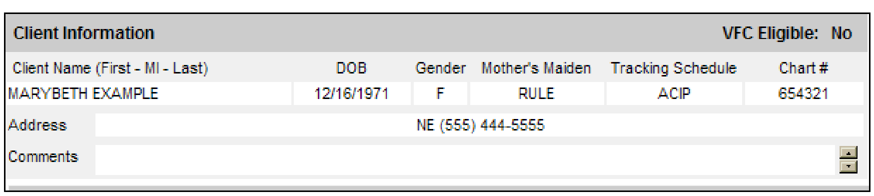
1. From the Manage Client screen, press **HISTORY/RECOMMEND** to save entered information and display the Immunization History screen.
2. Or, choose **MANAGE IMMUNIZATIONS** under the Immunizations section of the menu panel. This will bring up the Find Client screen. For information on finding clients, refer to the *Finding Clients* section in the Managing Clients chapter of this manual.

Viewing Client Immunization Information

The Immunization History screen holds a large amount of information on each client in NESIIS. The screen has three sections: Client Information, History, and Vaccines Recommended by Selected Tracking Schedule.

Client Information

The Client Information section at the top of the Immunization History screen gives vital information on the client, such as name, date of birth, tracking schedule, address, and a scrollable list of client comments. Comments that are often contraindications with the use of a particular vaccine will be identified on the client's immunization recommendations. Use this information to verify that the client indicated is the client for whom you were searching. To edit this information, press **EDIT CLIENT** and refer to the *Editing/Entering Client Information* section in the Managing Clients chapter of this manual.


Client Information VFC Eligible: No

Client Name (First - MI - Last)	DOB	Gender	Mother's Maiden	Tracking Schedule	Chart #
MARYBETH EXAMPLE	12/16/1971	F	RULE	ACIP	654321

Address NE (555) 444-5555

Comments

In the top right corner of the Client Information section, the message "VFC Eligible:" appears, followed by "Yes" or "No." This message indicates whether the client is eligible for the Vaccines for Children (VFC) program.

History

This table lists all the vaccinations the client has received to date. Immunizations are listed alphabetically, then by "Date Administered."

History | Add Immunization | Edit Client | Reports | Print | Print Confidential

Vaccine Group	Date Administered	Series	Trade Name	Dose	Owned?	Reaction	Hist?	Edit
HepB	03/16/1972	1 of 3	Engerix-B Peds ®				Yes	
	04/13/1972	2 of 3	Engerix-B Peds ®				Yes	
Influenza	12/21/2009	1 of 1	Flu-Mist ®				Yes	

Vaccine Group: This is the vaccine group name.

Date Administered: This date is the day the client was given the vaccine. To view the tracking schedule information for the selected immunization or an explanation of why an immunization is not valid or appropriate, click on this date. "HISTORIC" may display in this column for a previously administered vaccination, such as smallpox, when the client doesn't have documented proof of the date of the immunization.

Series: The number in this column is created by validating the vaccination date against the client's assigned tracking schedule. The system then provides the number of the immunization within the series or indicates that the vaccine was invalid because the client was not old enough to receive it or not enough time elapsed between doses. "Pending" may also appear in this column for certain vaccinations, such as a smallpox immunization awaiting an evaluation. "No Take" or "Equivocal" will display if the current vaccination has a no take or equivocal response. "Partial Dose" will display if the shot is flagged as a partial dosage.

Trade Name: This is the manufacturer's trade name of the vaccine.

Dose: This column indicates whether full, half, or multiple doses were administered to the client.

Owned?: If this column indicates "No," it means another provider organization entered the information and is attesting to its validity. To view the immunization data, click on the "No" link in the "Owned" column or click on the notepad icon () in the "Edit" column, explained on the next page.

Owned vs. Not Owned Immunizations

A single provider does not own any of the clients within NESIIS, but an organization does own the immunizations it provides. If the "Owned" column on the Immunization History table shows a "No" for one or more vaccines, this indicates that another organization entered the vaccine information and is attesting to the validity of the information.

A vaccine may be owned and historical, which means data was taken from a paper record, or owned and "new," which means the vaccine drew from NESIIS inventory. Any provider may edit a historical immunization, but "new" or non-historical shots may only be edited by the organization that administered the vaccine.

Reaction: If this column indicates "Yes" and appears in red, this means a reaction to a vaccine was recorded. To view the client's reaction, click on the "Yes" link in the Reaction column or click on the notepad icon in the "Edit" column, explained below.

Hist?: If this column indicates "Yes," this record is historical, meaning the immunization information was the result of a data transfer or was taken from a paper record and did not come from NESIIS inventory. Otherwise, it came from a NESIIS provider's inventory; see "Owned?" on the previous page.

Edit: When you click on the notepad icon in this column, you will be able to edit the recorded immunization using the Edit Immunization screen, as long as the immunization is owned by your organization or is historical.

Below the History section, the client's exact age is shown in a solid blue field. The age also displays on the printable version of this page.

Vaccines Recommended by Selected Tracking Schedule

This table lists all vaccines recommended by the tracking schedule associated with the client. Immunizations are listed alphabetically.

Current Age: 38 years, 7 days

Vaccines Recommended by Selected Tracking Schedule — Add Selected

Select	Vaccine Group	Earliest Date	Recommended Date	Overdue Date	Latest Date
	HepB	Complete			
☐	Influenza	01/18/2010	12/21/2010	06/21/2011	
☑	Meningo	12/16/1973	12/16/1982	12/16/1986	
	MMR	Complete			
☑	Pertussis(Tdap)	12/16/1981	12/16/1982	12/16/1984	
	Pneumococcal	Maximum Age Exceeded			
☑	Polio	01/27/1972	02/16/1972	03/16/1972	
☑	Td	12/16/1978	12/16/1978	01/16/1979	
☑	Varicella	12/16/1984	12/16/1984	12/16/1985	

Select: Vaccines that are at or past the recommended date are checked automatically for selection on the Immunization Entry Screen. You may also check other vaccines for inclusion on the Immunization Entry Screen. The selections will display on the Immunization Entry screen when the **ADD SELECTED** button is pressed.

Vaccine Group:	This column lists the vaccine group name. To view the tracking schedule information for the selected immunization or an explanation of why an immunization is not valid or appropriate, click on this date.
Earliest Date:	This date is the earliest date that the client may receive the vaccine.
Recommended Date:	This date is the recommended date that the client may receive the vaccine.
Overdue Date:	This date is the date at which the client is past due for the immunization. This will also trigger the use of an accelerated schedule for future immunizations.
Latest Date:	This date is the latest date at which the client may receive the vaccine.

Editing Immunizations

Editing Historical Immunizations

To edit a historical immunization, use the following steps:

1. On the Immunization History table, select the vaccine you wish to edit by clicking on the vaccine's notepad icon (📝) in the Edit column.

Immunization color coding

Yellow: A date shaded yellow indicates that today's date falls after the earliest date and before the recommended date for an immunization that has not been received.

Green: A date shaded green indicates that today's date is equal to or past the recommended date, is before the overdue date, and that the immunization has not yet been received.

Blue: A date shaded blue indicates that today's date is equal to or past the overdue date for an immunization that has not been received.

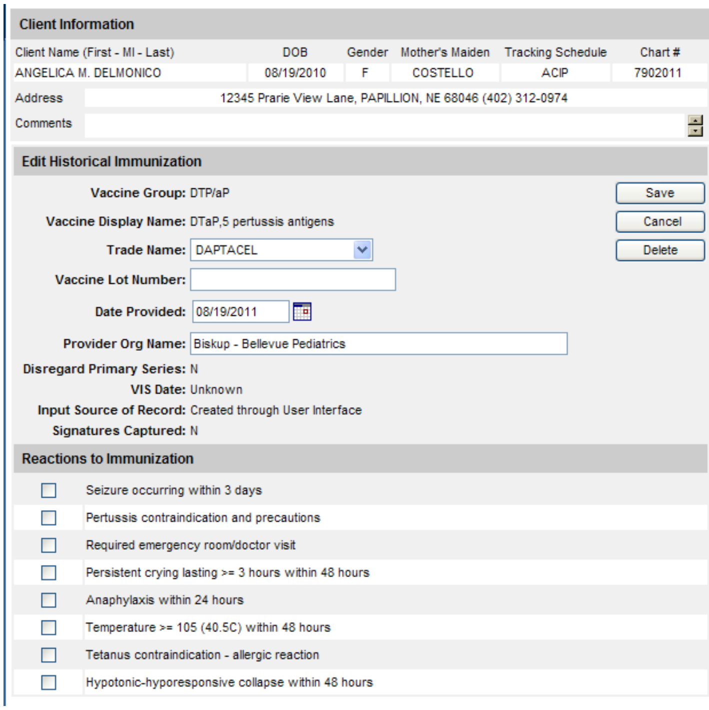
Pink: A row shaded pink indicates the client has completed the immunization series according to the chosen tracking schedule, has exceeded the maximum age for the vaccine, or has completed the series early.

Red: If vaccine groups within a combined vaccine result in different recommendation dates, the recommendations for the components will be highlighted in red. This occurs when only one part of the combination is validated based on the series specific to that combination vaccine.

Vaccines Listed on Selecting Immunizations to Add Screen

Within the Immunizations section of the Select Immunizations screen, vaccines at the top of the screen under “Active immunization inventory on <date> ”are those for which inventory exists at the site selected in the Defaults for New Immunizations section. Once a new site is selected, the Immunizations section will automatically update to reflect the immunization inventory of that site.

The vaccines shown at the bottom of the screen under Immunizations Available for Historical Shots Only are those that are not available in inventory for the currently selected site. These vaccines may be selected for entering historical immunizations only.



2. In the Edit Historical Immunization screen, you may edit information for Trade Name, Vaccine Lot Number, Date Provided, and Provider Organization Name fields.
3. To record a reaction to a vaccine, check the box to the left of the reaction in the Reactions to Immunization section.
4. Press **SAVE**.

Deleting Historical Immunizations

To delete a historical immunization, follow these steps:

1. On the Immunization History table, select the vaccine you wish to delete by clicking on the vaccine’s notepad icon ( ) in the Edit column.
2. At the Edit Historical Immunization screen, press **DELETE**.
3. Press **OK** in the confirmation box.

Editing Owned Immunizations from Inventory

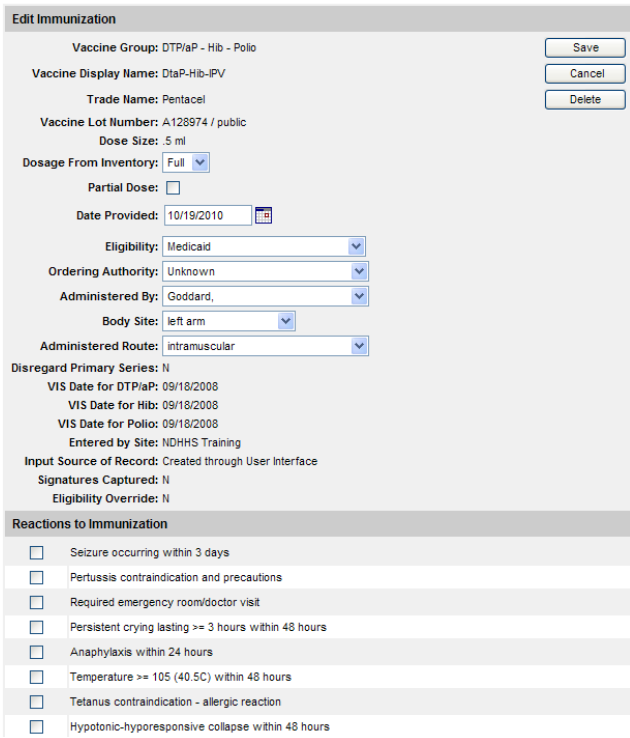
An immunization that is not historical is one that was given out of inventory. You will not be able to edit non-historical immunizations that are owned by another organization.

To edit an immunization given out of inventory, follow these steps:

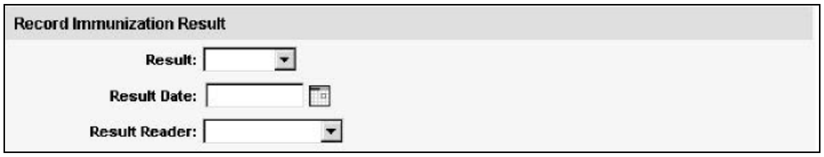
Selecting Immunizations to Add

When entering default values on the Selecting Immunizations to Add screen for either new or historical immunizations, note that you will have the opportunity to change most of these values for each individual vaccine on the next screen, the Immunization Entry screen. This mechanism allows you to enter batch historical information or new vaccination information on the Select Immunizations screen, while giving you the opportunity to override these defaults in the next screen.

1. In the Client's Immunization History, select the vaccine you wish to edit by clicking on the vaccine's notepad icon () in the Edit column.



2. To indicate a half or multiple dosage, choose the appropriate response from the Dosage from Inventory pick list. For example:
   - **Half**: If a half dosage of an adult formulation was used for a child, indicate half.
   - **Multiple**: If two or more doses of a pediatric formulation were used on an adult, indicate the number of doses used.
3. To indicate a partial dosage, check the Partial Dose checkbox. For example, check this box if a partial dosage was administered because the needle broke or came out or the vial broke.
4. Update information in the Dosage from Inventory, Partial Dose, Date Provided, Eligibility, Ordering Authority, Administered By, Administered Route, and/or Body Site fields on the Edit Immunization screen, if applicable.
5. To indicate a Vaccine Information Statement (VIS) date other than the default date, choose an alternate date from the pick list. This date can only be edited the same day a new immunization is entered into NESIIS. At any other time, this field will be un-editable.
6. To record the results of an immunization (the Record Immunization Result box will only display for certain immunizations with a date that are new or historical [but not HISTORIC]), enter a take response from the Result pick list. Then, enter the Result Date in MMDDYYYY format. If the immunization is new (not historical), you may choose the name of the Result Reader from the pick list.



7. To record a reaction to the immunization, check the box next to the applicable reaction at the bottom of the screen.
8. Press **SAVE**.

Deleting Owned Immunizations from Inventory

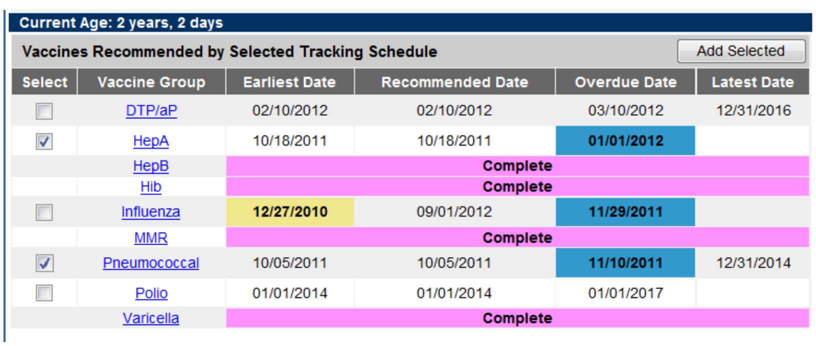
Note that you will not be able to delete non-historical immunizations that are owned by another organization.

1. On the Immunization History table, select the vaccine you wish to delete by clicking on the vaccine's notepad icon (📝) in the "Edit" column.
2. At the Edit Immunization screen, press **DELETE**.
3. Press **OK** in the delete confirmation box.

Entering Immunizations

To enter ***NEW*** (from your inventory) immunizations, follow these steps:

6. At the Immunization History screen, select the immunizations you are going to administer by placing a "check Mark" in the box preceding each vaccine type.



Current Age: 2 years, 2 days

Vaccines Recommended by Selected Tracking Schedule — Add Selected

Select	Vaccine Group	Earliest Date	Recommended Date	Overdue Date	Latest Date
☐	DTP/aP	02/10/2012	02/10/2012	03/10/2012	12/31/2016
☑	HepA	10/18/2011	10/18/2011	01/01/2012	
	HepB	Complete			
	Hib	Complete			
☐	Influenza	12/27/2010	09/01/2012	11/29/2011	
	MMR	Complete			
☑	Pneumococcal	10/05/2011	10/05/2011	11/10/2011	12/31/2014
☐	Polio	01/01/2014	01/01/2014	01/01/2017	
	Varicella	Complete			

7. Press **ADD SELECTED**.

Please note: Pressing **ADD IMMUNIZATION** will display the Select Immunizations screen without pre-selecting recommended vaccines. Pressing **ADD SELECTED** will display the Select Immunizations screen with all of the selected immunizations from the recommended vaccines list checked.

8. Choose the Organization Site, Ordering Authority, Eligibility, and Administered By fields by choosing from the pick lists in the Defaults for New Immunizations section. You will be able

The Vaccine Administration Report Language Selection list, Get Signature(s) button, and the Signatures for New Immunizations section are only present if a signature pad is properly installed and at least one inventory immunization is selected.

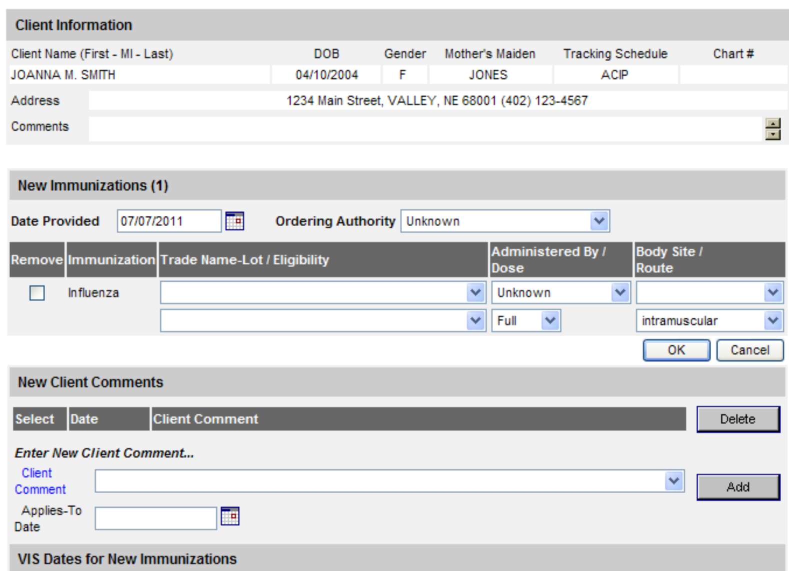
to edit these defaults on the next screen.

9. Enter the date for the Date Administered 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**.

10. If you are entering a new immunization for a past date and do not see one or more of the selected vaccines listed in the Immunization section to the left, press **ACTIVATE EXPIRED**. Pressing this button will display the active vaccine inventory for the date you entered in the Date Administered field.

11. Press **OK.**

12. At the next screen, verify or enter the Date Provided and Ordering Authority for the new immunization(s) listed in the New Immunizations table.



13. Place a check in the Remove check box only if this immunization should not be entered into the NESIIS database. For example, if NESIIS informs you that the immunization is a duplicate, you should remove or modify the entry.

14. Choose a Trade Name-Lot from the pick list for the first listed vaccine.

15. Choose or verify eligibility if not identified previously.

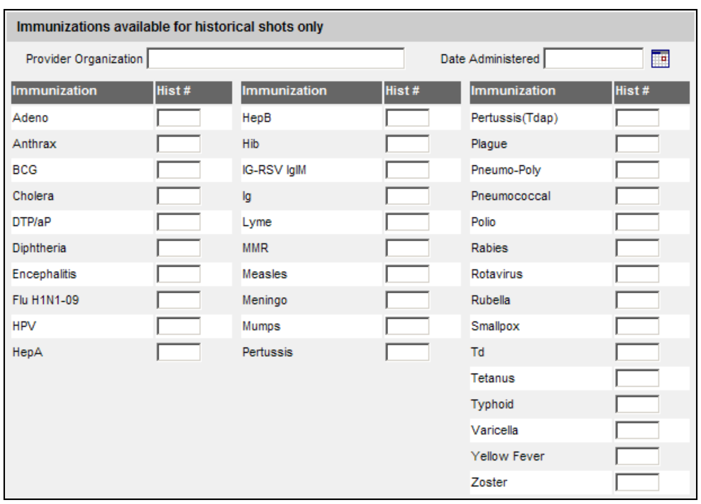
16. Enter pick list information for the following fields for each vaccine:

- **Dose**: This field should be filled with the dosage given to the client. Use the pick list to select full, half, or multiple doses.
- **Administered By**: This field should be filled with the name of the clinician that administered the immunization. The field will display default data.
- **Body Site**: This field should be filled with the area of the body where the immunization was given.

- **Route**: This field should be filled with the method of administration; for example, intramuscular, oral, etc. This field will display default data.
- Under New Client Comments, select a comment or refusal from the pick list, if applicable. Enter an “applies-to date” for each comment, and then press **ADD** to enter a new comment. You may also click the radio button () next to an existing comment and press **DELETE** to remove it.
- If new immunizations were entered, default VIS dates will be displayed under VIS Dates for New Immunizations. These dates can be changed using the pick list for each vaccine listed. If you change a VIS date for a multi-vaccine VIS, all vaccines in the multi-vaccine VIS shown will be changed to the same VIS date.
- Press **OK**. This will add the immunization(s) to NESIIS
- NESIIS will take you back to the Immunization History screen and will display the entered vaccines with dates and validation, in addition to updated vaccine recommendations.

To enter ***HISTORICAL*** immunizations, follow these steps:

1. At the Immunization History screen press **ADD IMMUNIZATION.**
2. Add historical immunizations by typing the number of immunizations administered for each vaccine into the text box in the “Hist #” column. For example, if a client received two historical DTaP vaccines, enter “2” in the “Hist #” box. Do not click the check box in the “New” column for the vaccine, unless the client also received this vaccine from inventory. Enter all historical vaccine counts on this page.


Immunizations available for historical shots only

Provider Organization Date Administered

Immunization	Hist #	Immunization	Hist #	Immunization	Hist #
Adeno		HepB		Pertussis(Tdap)	
Anthrax		Hib		Plague	
BCG		IG-RSV IgIM		Pneumo-Poly	
Cholera		Ig		Pneumococcal	
DTP/aP		Lyme		Polio	
Diphtheria		MMR		Rabies	
Encephalitis		Measles		Rotavirus	
Flu H1N1-09		Meningo		Rubella	
HPV		Mumps		Smallpox	
HepA		Pertussis		Td	
				Tetanus	
				Typhoid	
				Varicella	
				Yellow Fever	
				Zoster	

3. Enter default information for historical immunizations. You will be able to edit both of the following defaults for each immunization on the next screen.
   - Enter the date the immunization was given in the Date Administered field. Use 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.
   - Select the Trade Name of the administered vaccine – if the trade name is known. If the trade name is not known then leave this field blank.

- Enter the Lot # of the administered vaccine – if the lot # is known. If the lot # is not known then leave this field blank.
- Enter the name of the organization that administered all or most of the immunizations in the Provider Organization field. If the Provider is not known then leave this field blank.

4. Press **OK** at the top of the screen.

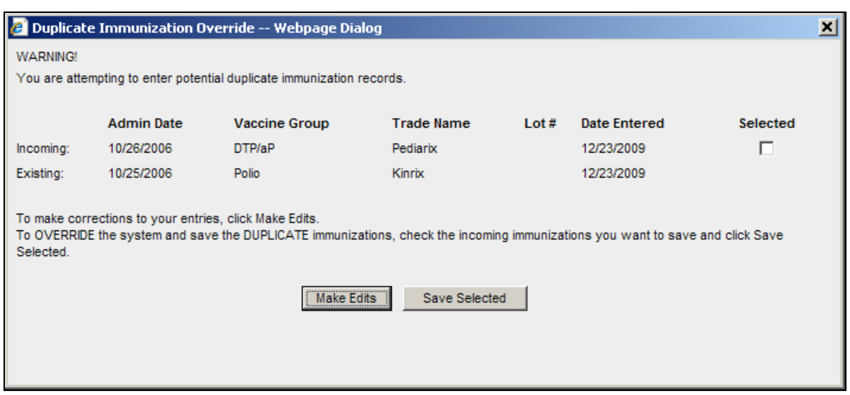
Duplicate Immunizations

After the user enters an immunization(s) and presses **OK**, NESIIS executes a process designed to flag duplicate immunizations. NESIIS identifies potentially duplicate immunization records for a client based on a vaccine administration date window (2-4 days) and whether there are overlapping vaccine groups for the two immunizations in question. If NESIIS finds potential duplicates based on these factors, it will determine how closely matched two immunizations are based on whether they are from NESIIS inventory, are combination vaccines, or have a trade name or lot number.

Once NESIIS determines that potentially duplicate immunization records exist based on date window and vaccine group factors, two outcomes are possible. If the immunizations are a close enough match, NESIIS uses rules based on the remaining factors of NESIIS inventory, combination vaccines, trade name, or lot number to select one single, winning record and to discard the losing record. If, on the other hand, NESIIS determines the differences in the factors may be significant, then the user must review the immunizations in question and determine which record to keep.

If you receive a duplicate immunization override warning, follow these steps:

1. In the duplicate immunization override warning dialog box, review all immunizations to determine whether there are any duplicates.



2. If the immunization(s) you entered need to be removed or edited, press **MAKE EDITS**. At the Record Immunization screen, make changes or remove immunizations as needed. Press **OK**.
3. If an immunization(s) listed in the warning dialog box is *not* a duplicate, select the checkbox(es) next to the immunization(s) to enter it as a separate vaccine event and press **SAVE SELECTED**.

Applying a Prerequisite Override to a Client's Immunization

A prerequisite override is a command within a tracking schedule that allows users to override a prerequisite vaccine once a client reaches a certain age. A prerequisite override is not automatically applied to an individual client's immunization record. Refer to the *Managing the Prerequisite Override* section of the Tracking Schedule chapter of this manual for more information. To apply a prerequisite override to an immunization, follow these steps:

1. Enter the immunization as described in the *Entering Immunizations* section of this chapter. You may notice that, as in the case of Td, the immunization will appear on the immunization history as one of a series, when in fact it is a booster immunization. The next two steps will correct this.
2. Follow Steps 1-3 in the *Editing Owned Immunizations from Inventory* section of this chapter.
3. In the field marked Disregard Primary Series, choose **YES**.
   - *Note:* This field will only appear open if the conditions (the chosen tracking schedule has an override on the vaccine and the age of the client is greater than or equal to the override age) meet those of the prerequisite override.
4. Press **SAVE**.

Other Features on the Immunization History Screen

The Immunization History screen contains two links to other NESIIS functions. These links are:

Edit Client:	Pressing this button will return you to the Manage Client screen for the client.
Reports:	Pressing this button will bring you to the Reports Available for This Client screen, at which you may generate Client-specific reports. Refer to the Reports and Forms chapter of this manual for more information.
Print:	Pressing this button will display the client's immunization information without the top or side NESIIS menus. To print this screen, click on the printer icon on your browser or click **File**, **Print**, and press **OK**. Press your browser's **BACK** ( ) button to return to the client screen.
Print Confidential:	Pressing this button will display the client's immunization information without top or side NESIIS menus and without client demographic information. To print this window, click on the printer icon on your browser or click **File**, **Print**, and press **OK**. Press your browser's **BACK** button to return to the client screen.

12 Reports and Forms

In this chapter:

Client-Specific Reports

Reminder/recall Notices

New Client Form

CoCASA Extracts

Assessment Reports

Benchmark Reports

Ad Hoc Reports

Vaccines for Children Reports

Callback Lists

The following are categories of reporting/exporting functions available through NESIIS:

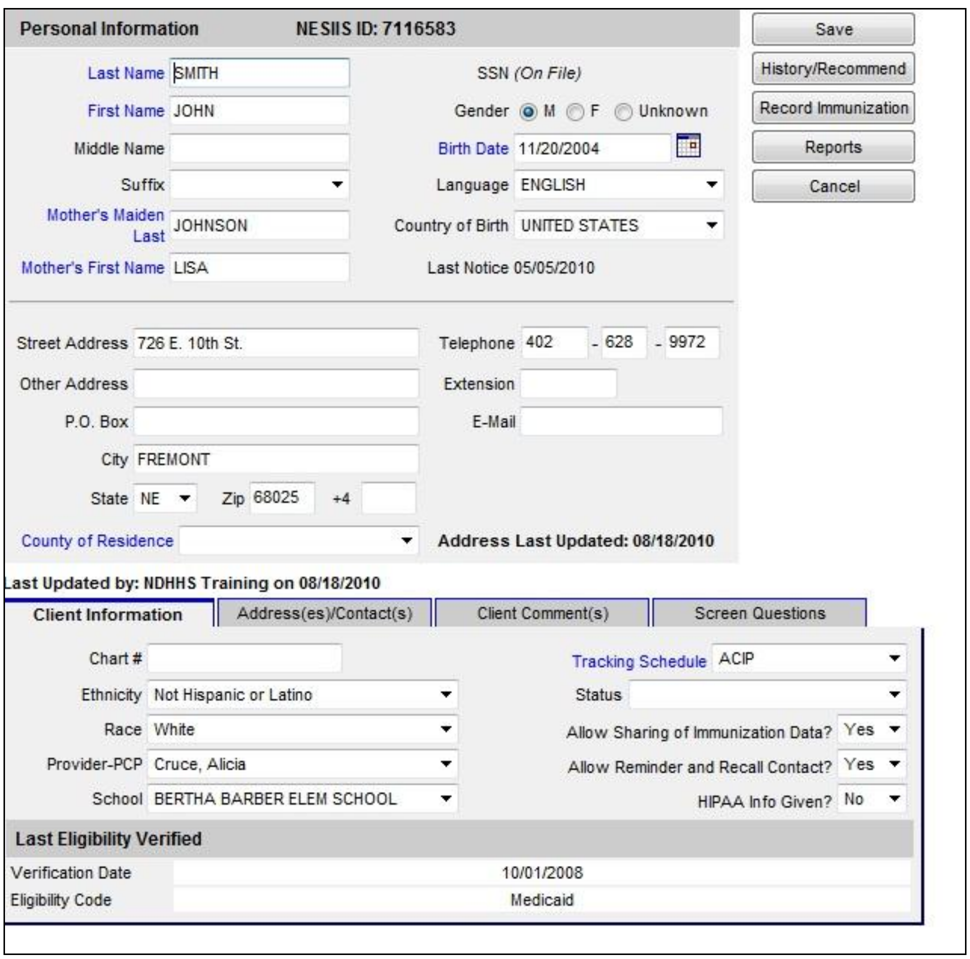
- Client-specific.
- Multiple-client.
- Vaccine-related.

Client-Specific Reports

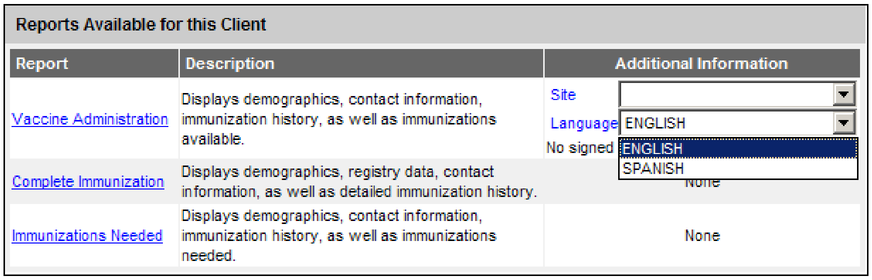
Three reports are available for generation for a client. These reports are the Vaccine Administration Record, the Complete Immunization report, and the Immunizations Needed report.

Vaccine Administration Record

The Vaccine Administration Record (VAR or "signature form") displays demographics, contact information, immunization history, and immunization inventory available for the selected clinic site. The responsible person's and clinician's signatures are also gathered on this form. To generate the report, follow these steps:



1. From a client's Manage Client screen or Manage Immunizations screen, press **REPORTS**.
2. At the Reports Available for This Client screen, choose a site and a language under the "Additional Information" column for the Vaccine Administration Record. If the client has signed the Vaccine Administration Record with your organization, you can alternatively select a report from the Signed pick list. **Report may be used as a routing slip.**



Reports Available for this Client

Report	Description	Additional Information
Vaccine Administration	Displays demographics, contact information, immunization history, as well as immunizations available.	Site Language ENGLISH No signed ENGLISH SPANISH
Complete Immunization	Displays demographics, registry data, contact information, as well as detailed immunization history.	None
Immunizations Needed	Displays demographics, contact information, immunization history, as well as immunizations needed.	None

3. Click on **Vaccine Administration**, which is underlined and in blue text.
4. Once the report is generated, it will be displayed using Adobe® Reader®. Refer to the Optimizing NESIIS chapter (5) in this manual for more information on Adobe® Reader®.
5. To print the report, press the printer icon ( ) on the Adobe® toolbar. Press **OK** in the Print dialog box.
6. To return to the Reports Available for this Client screen, press the **BACK** button ( ) on your browser.

Complete Immunization Report

The Complete Immunization report displays demographics, contact information, and a detailed summary of the client's immunization history. **This report will typically be used as a physician's chart copy.** To generate the report, follow these steps:

1. From a client's Manage Client screen or Manage Immunizations screen, press **REPORTS**.
2. At the Reports Available for This Client screen, click on **Complete Immunization**, which is underlined and in blue text.
3. Once the report is generated, it will be displayed using Adobe® Reader®. Refer to the Optimizing NESIIS (5) chapter in this manual for more information on Adobe® Reader®.

Generation of reminder and recall notices

Reminder and recall notices are generated for every responsible person associated with a client, provided:

- The client is active. Clients with a status of "Permanently Inactive — Deceased" or "Moved Out of State" *for any organization* will be excluded from the report.
- The "Allow Reminder and Recall Contact?" indicator on the Client Information tab is marked "Yes."
- The "Allow Sharing of Immunization Data" on the Client Information tab is marked "Yes."
- A responsible person's "Notices?" indicator in the Responsible Person(s) tab is checked.
- At least one immunization must have been provided to the client by the provider generating the notice.

To print the report, press the printer icon ( ) on the Adobe® toolbar. Press **OK** in the Print dialog box.

4. To return to the Reports Available for this Client screen, press the **BACK** button ( ) on your browser.

Immunizations Needed Report

The Immunizations Needed report displays demographics, contact information, immunization history, and immunizations recommended by date according to the tracking schedule assigned to the client. **Great report for parents!** To generate the report, follow these steps:

1. From a client's Manage Client screen or Manage Immunizations screen, press **REPORTS**.
2. At the Reports Available for This Client screen, click on **Immunizations Needed**, which is underlined and in blue text.
3. Once the report is generated, it will be displayed using Adobe® Reader®. Refer to the Optimizing NESIIS chapter (5) in this manual for more information on Adobe® Reader®.
4. To print the report, press the printer icon ( ) on the Adobe® toolbar. Press **OK** in the Print dialog box.
5. To return to the Reports Available for this Client screen, press the **BACK** button ( ) on your browser.

Reminder/Recall Notices

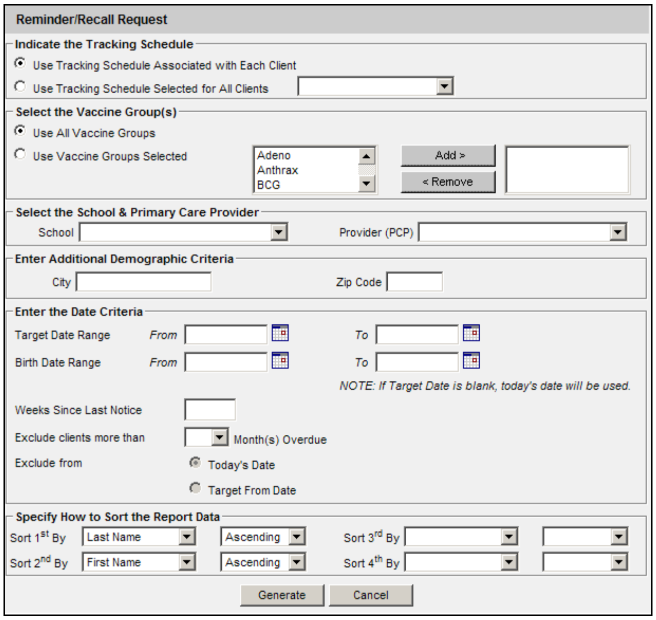
From the Reports menu option, you may generate reminder and recall notices, which include letters, cards, address labels, client listings, and downloadable text files.

Reminder/Recall Requests

To select and submit reminder/recall criteria for clients, you will need to fill in the Reminder Request screen, an online form.
Note: Clients whose client information is added or changed on the day the report is run may not appear in the results until the following day.

Follow these steps to generate reminder/recall requests:

1. Click **Reminder/Recall** under Reports on the menu panel.



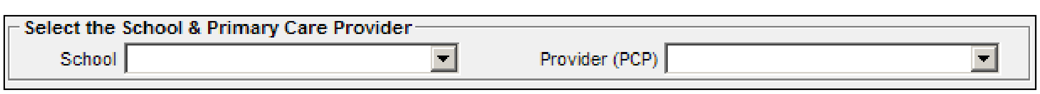
2. **Client Population**: *This section will only display for city and/or county organizations.* Select one of the options provided to continue with the report:

- Indicate that you wish this reminder to be for all clients with an active association to your organization by clicking the top radio button ( ).
- Indicate that you wish this reminder to be sent only to Medicaid eligible clients by checking the “Medicaid Eligible” checkbox.
- Indicate that you wish this reminder to be for all clients within your city or county by clicking the second radio button. *By default, inactive clients and clients not allowing reminders will be included in this report.*
    - Click **Remove Inactive Clients** to exclude clients who are associated with your organization but are marked as inactive.
    - Click **Remove Clients Not Allowing Reminders** to exclude clients who have requested that reminders not be sent to them.
- Indicate that you wish this reminder to be for all clients with an active association to your organization and in your city or county by clicking the third radio button. *By default, inactive clients and clients not allowing reminders will be included in this report.*
    - Click **Remove Inactive Clients** to exclude clients who are not active within your organization.
    - Click **Remove Clients Not Allowing Reminders** to exclude clients who have requested that reminders not be sent to them.
- Indicate that you wish this reminder to include or exclude clients residing in specified cities, census tracts, or ZIP codes without including any of the above options by clicking on the fourth radio button ( ).
    - Click **Remove Inactive Clients** to exclude clients who are not active within your organization.
    - Click **Remove Clients Not Allowing Reminders** to exclude clients who have

requested that reminders not be sent to them.

3. Enter information to either include or exclude clients residing in specified cities, census tracts, or ZIP codes. This option is only available for city or county organizations. This function can be used on its own by selecting the last option under Step 2, or in conjunction with the “associated with” or “residing in” options under Step 2. Refer to the Include/ Exclude Examples under the Benchmark Reports section in this chapter (12.25) for more information. Click to select the following:
    - **N/A**: Select this option if you wish to bypass the include/exclude function.
    - **Cities**: Select this option to include or exclude one or more cities from the list provided. If this option is chosen, highlight a city to include or exclude, then press **ADD**. Repeat for each city to include or exclude.
    - **Census Tracts**: Select this option to include or exclude one or more census tracts from the list provided. If this option is chosen, highlight a census tract to include or exclude, then press **OK**. Repeat for each census tract to include or exclude.
    - **ZIP Codes**: Select this option to include or exclude one or more ZIP codes from the list provided. If this option is chosen, highlight a ZIP code to include or exclude, then press **ADD**. Repeat for each ZIP code to include or exclude.
    - **Include/Exclude**: Select one of these options to either include or exclude the selected cities, census tracts, or ZIP codes from the report.
4. **Tracking Schedule**: In the tracking schedule section of the screen:
    - Indicate whether or not you wish to use the tracking schedule associated with each client or a uniform tracking schedule for all clients by clicking the appropriate radio button.
    - If you choose to use one tracking schedule for all clients, choose the appropriate schedule from the pick list provided.
5. **Vaccine groups**: In the vaccine groups section of the screen:
    - Indicate whether or not you wish to include all vaccine groups in the search criteria, or if you wish to include only selected groups by clicking the appropriate radio button ().
    - If you choose to include only selected vaccine groups, select these groups by double-clicking a group or highlighting a chosen group and pressing **ADD**. Do this for each group desired.

      Note: This will limit the search to only those clients who will be due/ past-due for the selected immunizations. However, NESIIS will provide a list of all immunizations for which the selected clients are due/ past-due.
6. **School/Primary Care Provider**: Choosing a school or primary care provider allows you to narrow your search to only the clients assigned to a particular school or physician/clinic. If you do not wish to specify a school and/or provider, leave these fields blank.



    - To choose a school, select a school name from the pick list provided.

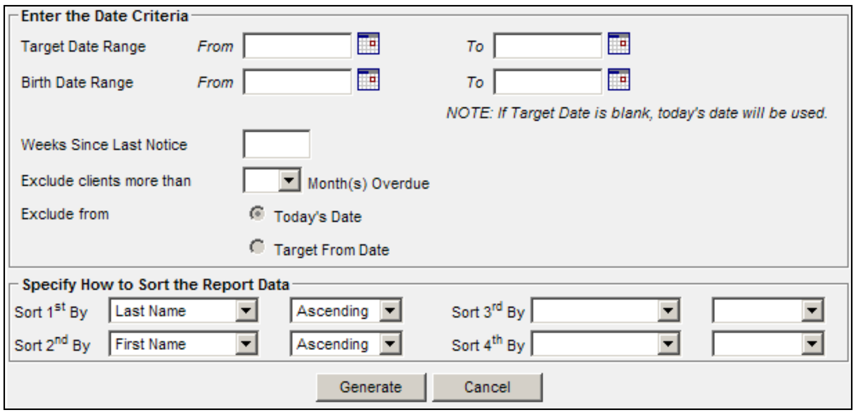
- To choose a primary care provider, select a physician or clinic name from the pick list provided.

7. **Additional Demographic Criteria**: Entering a city and/or ZIP code will narrow your search to only those clients associated with the entered geographical area. If you do *not* wish to specify a city or ZIP code, leave these fields blank.
   - To enter a city, type the city name within the first field.
   - To enter a ZIP code, enter the five-digit number in the next field.

   Note: These options are not available to public health organizations.

8. **Date Criteria**
   - **Target Date Range**: When a target date is specified, the report will include those clients that are due/overdue for immunizations within the date range. To choose a target date range, enter the beginning date in the From text box and the ending date in the To text box in MMDDYYYY format.

     Note: These dates can range from the past to the future; therefore, you have the capability to run a recall, reminder, or a combination of the two.



     - If the From date is unspecified for the Target Date Range, the system will use the date that you run the report.
     - If the To date is unspecified for the Target Date Range, the system will use the date that you run the report.
     - If both the From and To dates are left blank, the system will find those clients who are due or overdue as of the date that you run the report.
   - **Birth Date Range**: When a birth date range is specified, the report will return those clients who have a birth date that falls within the range entered. To choose a birth date range, enter the beginning date in the From text box and the ending date in the To text box in MMDDYYYY format.

Waiting for Reminder Requests

Once you reach the Reminder Request Status screen, it is not necessary to stay at this screen while your report is being generated. You may go anywhere in the NESIIS site while the report is being created and may return to the status screen by clicking on the Check Reminder Status link under Reports on the menu panel. Likewise, you may close out of NESIIS and return to the status screen by clicking on the Check Reminder Status link after logging in again.

- If the From date is unspecified for the Birth Date Range, the report will include the oldest clients in the system, some born in the 1800s.
- If the To date is unspecified for the Birth Date Range, NESIIS will use today's date.

- **Weeks Since Last Notice**: When a number is entered in this field, the report will include only those clients who have not received a reminder notice within the specified number of weeks prior to the current date.

  Note: Clients are shared between organizations; therefore, another organization may have recently generated a notice for the client.

- **Exclude Clients More Than**: To exclude clients who are overdue and who may have received several reminders already, provide a number of months from the pick list provided.
- **Exclude From**: If excluding clients overdue for a certain number of months, indicate the date from which clients should be excluded; choose either today's date or the Target "From" Date (uses the date from the field at the top of the section) by clicking the appropriate radio button (). If no target date information is entered, clients will be excluded from today's date.

9. **Sorting Criteria**: This section allows you to specify how the data will be sorted. If a sort order is not specified, NESIIS will sort the report results first by the client's last name in ascending order (A to Z), then by the first name in ascending order.
   - **Sort 1st By**: Choose a primary information field by selecting from the pick list provided.
   - **Ascending/descending order**: Choose how the primary field is sorted; choose either ascending (A to Z) or descending (Z to A) order from the pick list.
   - Complete additional ordering sequences for the second through fourth sorts.
10. **Generate the Report**: Press the **GENERATE** button. Depending upon the number of clients associated with your provider organization, it may take five minutes or more to generate the data for the various reports. While the data are being generated, the Reminder Request and Output status page indicates the percentage of completion. Periodically press **REFRESH** to update the status. You may work in other areas of the system while waiting for the reminder/recall request to complete. You may check the status of your request by clicking on *Check Reminder Status* under the Reports menu.

Summary Screen

When the report is complete, you may click on the blue underlined date to go to the Reminder Request Process Summary screen. The Summary screen lists the number of clients involved in the search and the criteria that were used to define the search. From the Summary screen, you may create various reminder output options.

Reminder Request Process Summary		
Step	**Criteria Evaluated at this Step**	**Clients**
1	Clients **associated** with *IR Physicians*.	20
2	Clients **immunized** by *IR Physicians*.	14
3	Clients that are **active** within *IR Physicians* and **allow Reminder & Recall Contact**. Additional criteria includes: • **Birthdate range** is not specified; • **County** is not specified; • Clients that attend the following **school: Sunny Day DayCare**. • **Provider** is not specified. • **Weeks Since Last Notice** is not specified.	2
4	Clients that have one or more responsible persons that **Receive Notices**. Additional criteria includes: • **City** is not specified • **Zip Code** is not specified.	1
5	Clients that **Allow Sharing of Immunizations**.	1
6	Clients that meet the following criteria regarding vaccination status: • Clients that are **Recommended or Overdue** for one or more vaccinations **between 12/23/2008 to 12/23/2009**; • Use all **vaccine groups**; • Use **ACIP** for all clients. • **Exclude Overdue Reminders** is not specified.	1
	Total Number of Clients Eligible for Reminder	**1**

Last Notice Date Options

On the bottom of the Reminder Request Process Summary screen, you have the option of resetting the last notice date, which will affect future reminder/recall notices generated using this information. Your options on the last notice date table include:

Last Notice Date Options	
Set last notice date to today for all eligible clients when you select a report output.	☑
*Revert last notice date to previous last notice date for all clients **eligible for this reminder**.*	Revert Eligible
*Revert last notice date to previous last notice date for **all clients immunized** by IR Physicians.*	Revert All
Return to the previous screen.	Cancel

1. Set the last notice date to today's date. This is the default option and is indicated by a check mark.
2. Set the last notice date to reflect the previous last notice date for all clients eligible for this reminder by pressing **REVERT ELIGIBLE**. Use this option if you choose not to have the current report generation reflected in the Last Notice Date option on the Reminder Request screen for the recipients of this reminder.
3. Set the last notice date to reflect the previous last notice date for all clients immunized by your organization by pressing **REVERT ALL**.

   Use this option if you choose not to have the current report generation reflected in the Last Notice Date option on the Reminder Request screen for all clients immunized by your organization.
4. Return to the previous screen. Press **CANCEL** to return to the Reminder Request Status screen.

Reminder/Recall Output Options

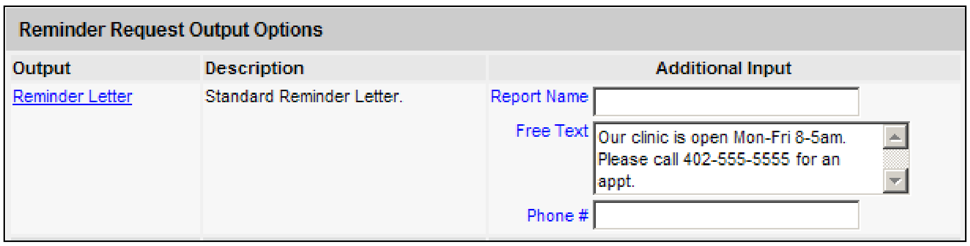
The Reminder Request Output Options table, found on the Reminder Request Process

Summary screen, allows you to choose how you would like to use the data from your query.

Letters

The letter output option allows you to generate a standard form letter for the responsible person(s) for each client returned on your query. The letter allows room at the top for your organization's letterhead. The body of the letter includes the client's immunization history, recommended immunizations and due dates, and up to two lines of free text and/or a telephone number. To generate letters, follow these steps:

1. Under the Additional Input column for the Letter section of the table, enter:



   - A report name in the appropriate field, if desired.
   - Additional information in the Free Text field, if desired. You may include a maximum of 400 characters in this field.
   - A telephone number in the appropriate field, if desired.

2. Click on **Reminder Letter**, which is underlined and in blue text.
3. Your report will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
   - You have the option of moving to other portions of NESIIS or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, press **Check Reminder Status** under Reports on the menu panel.
   - If you choose to stay at the Reminder Request Status screen while your request is processing, press **REFRESH** occasionally to check the status.
4. Once the report name is underlined and appears in blue, your letters are ready. Click on the report name to view or print the letters in Adobe® Reader®.
5. To print the letters, press the printer icon ( ) on the Adobe® toolbar. Press **OK** in the Print dialog box.
6. To print additional notices, press the **BACK** button ( ) on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top box) to return to the Reminder Request Process Summary screen.

Custom Letters

The custom letter output option allows you to generate a customized form letter for the responsible person(s) for each client returned on your query. To create a new custom letter, refer to the “Creating Custom Letters” section of this chapter. To generate a custom letter from the Reminder Request Process Summary screen, follow these steps:

1. Enter a report name for the custom letter you wish to generate. Click the link with the name of the custom letter. The letter and mailing labels will begin generating immediately.
2. Your report will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
    - You have the option of moving to other portions of NESIIS or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, press **Check Reminder Status** under Reports on the menu panel.
    - If you choose to stay at the Reminder Request Status screen while your request is processing, press **REFRESH** occasionally to check the status.
3. Once the report name is underlined and appears in blue, your letters and mailing labels are ready. Click on the report name or mailing labels link to view or print the letters in Adobe® Reader®.
4. To print the letters, press the printer icon ( ) on the Adobe® toolbar. Press **OK** in the Print dialog box.
5. To print additional notices, press the **BACK** ( ) button on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top box) to return to the Reminder Request Process Summary screen.

Cards

The card output option allows you to generate a standard (4x6 inch) postcard, printed one card per page. The body of the card includes the client’s recommended immunizations and due dates, up to two lines of free text, and a telephone number. To generate reminder cards, follow these steps:

1. Under the Additional Input column for the Cards section of the table, enter:

Reminder Request Output Options

Output	Description	Additional Input
Reminder Card	Standard Reminder Card (4x5).	Report Name Free Text Phone #

- A report name in the appropriate field, if desired.
- Additional information in the Free Text field, if desired. You may include a maximum of 275 characters in this field.
- A telephone number in the appropriate field, if desired.

2. Click on **Reminder Card**, which is underlined and in blue text.
3. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
   - You have the option of moving to other portions of NESIIS or using other functions of your computer while you are waiting for your cards to process. To return to check the progress of your request, press Check Reminder Status under Reports on the menu panel.
   - If you choose to stay at the Reminder Request Status screen while your request is processing, press **REFRESH** occasionally to check the status.
4. Once the report name is underlined and appears in blue, your cards are ready. Click on the report name to view or print the cards in Adobe® Reader®.
5. To print the cards, press the printer icon ( ) on the Adobe® toolbar. Press **OK** in the Print dialog box.
6. To print additional notices, press the **BACK** button ( ) on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top box) to return to the Reminder Request Process Summary screen.

Labels

The labels output option produces 30 labels per page on Avery Mailing Labels #5160. To generate mailing labels, follow these steps:

1. Under the Additional Input column for the Labels section of the table, enter a report name, if desired.

Mailing Labels	Avery Mailing Labels.	Report Name 12/24/2009

2. Click on **Mailing Labels**, which is underlined and in blue text.
3. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
   - You have the option of moving to other portions of NESIIS or using other functions of your computer while you are waiting for your labels to process. To return to check the progress of your request, press **Check Reminder Status** under Reports on the menu panel.
   - If you choose to stay at the Reminder Request Status screen while your request is processing, press **REFRESH** occasionally to check the status.
4. Once the report name is underlined and appears in blue, your labels are ready. Click on the report name to view or print the labels in Adobe® Reader®.
5. To print the labels, press the printer icon ( ) on the Adobe® toolbar. Press **OK** in the Print dialog box.
6. To print additional notices, press the **BACK** button ( ) on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top box) to

return to the Reminder Request Process Summary screen.

Client Query Listings

The Client Query Listing is produced for the provider organization administrator's records. This report lists every client that was returned in the report query process, along with the phone number and address of every responsible person associated with each client. Insufficient addresses or telephone numbers on this report represent missing information on a responsible person. To generate a Client Query Listing, follow these steps:

1. Under the Additional Input column for the Client Query Listing section of the table, enter a report name, if desired.

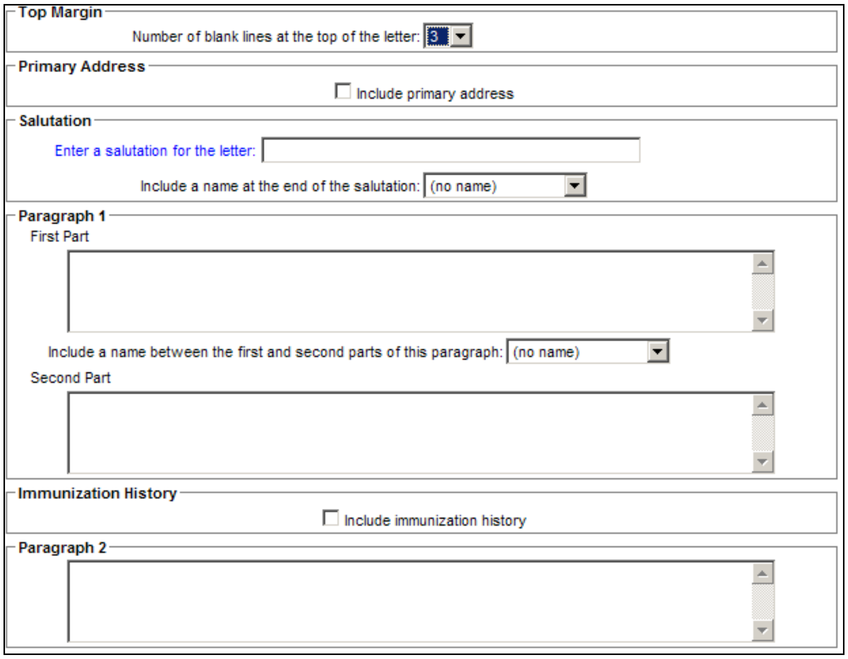
Client Query Listing	A list of clients based on the report criteria.	Report Name	Client Listing 05/01

2. Click on **Client Query Listing**, which is underlined and in blue text.
3. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
    - You have the option of moving to other portions of NESIIS or using other functions of your computer while you are waiting for your report to process. To return to check the progress of your request, press **Check Reminder Status** under Reports on the menu panel.
    - If you choose to stay at the Reminder Request Status screen while your request is processing, press **REFRESH** occasionally to check the status.
4. Once the report name is underlined and appears in blue, your report is ready. Click on the report name to view or print the report in Adobe® Reader®.
5. To print the report, press the printer icon ( ) on the Adobe® toolbar. Press **OK** in the Print dialog box.
6. To print additional notices, press the **BACK** button ( ) on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top box) to return to the Reminder Request Process Summary screen.

Creating Custom Letters

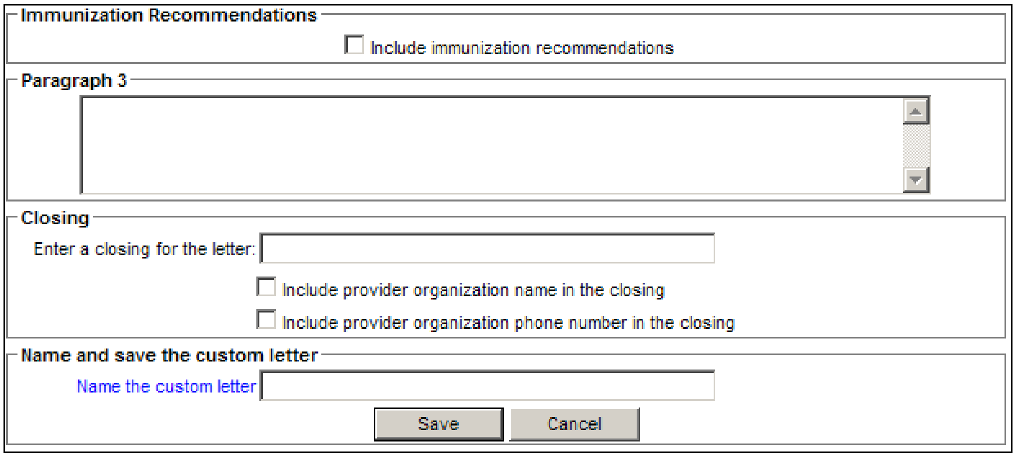
In addition to form letters, NESIIS allows users to create and store up to three custom letters to be used for recall/reminders. To create a new custom letter, follow these steps:

1. Click on **Manage Custom Letters** under Reports on the menu panel.
2. Click the underlined **New Custom Letter** link.



3. At the Create New Custom Letter screen, enter the following:

   - **Top Margin**: Choose the number of blank lines you would like at the top of the letter from the pick list provided.
   - **Primary Address**: Check the radio button () to include the organization's primary address at the top of the letter.
   - **Salutation**: Enter a greeting, and then choose a name option from the pick list provided.
   - **Paragraph 1**: Enter text in this field. If you wish to include a name within the paragraph, enter text up to the mention of the name in the field marked "First Part," ending with a single space. Next, choose the name you would like to appear within the paragraph from the pick list (either parent or guardian, client name, or no name). Continue to enter the rest of the text following the name, preceded by a single space, in the field marked "Second Part." If you do not wish to include a name, you may enter all of the first paragraph text in the field marked "First Part" and select "no name" from the name pick list.
   - **Immunization History**: Check the box to include the client's immunization history in the letter.
   - **Paragraph 2**: Enter more text in this field, if desired.



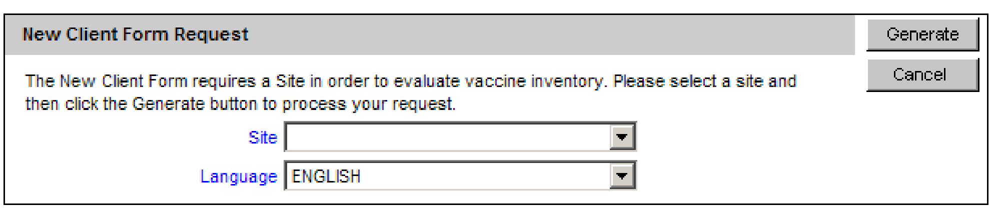
- **Immunization Recommendations**: Check this box to include the immunizations recommended for the client in the letter.
- **Paragraph 3**: Enter text in this field, if desired.
- **Closing**: Enter a closing word or statement in this field. If you wish to include your provider organization's name and/or telephone number after the closing, check the appropriate box(es).
- **Name and Save the Custom Letter**: Enter a name for the letter in the field provided. When the letter is complete, press **SAVE**.

Custom letters may now be generated using the process described in "Reminder/Recall Output Options," located in this chapter.

New Client Form

The New Client Form allows you to print a blank Vaccine Administration Record, which includes a current inventory table for the selected provider site. Use this form to collect information on a client who does not yet exist in the NESIIS database. The responsible person's and clinician's signatures are also gathered on this form. To print out a New Client Form, follow these steps:

1. Click on the **Forms** menu option at the top of the page.



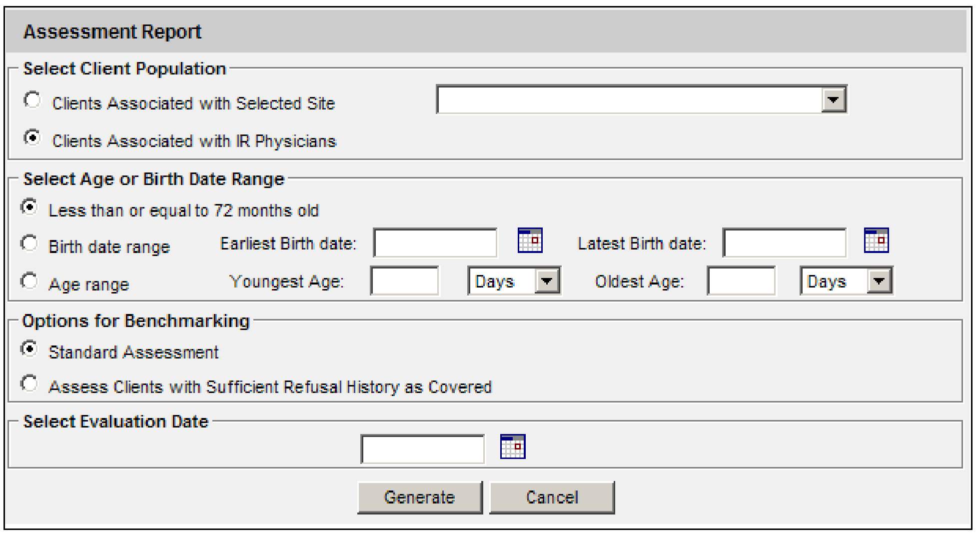
2. Under New Client Form Request, pick the site at which the client will be seen so that the appropriate inventory will appear on the record.
3. Choose the language in which you would like the new client form to display.
4. Press **GENERATE**.
5. The form displays in Adobe® Reader®.

6. To print the report, press the printer icon ( ) on the Adobe® toolbar.
7. Press **OK** in the Print dialog box.
8. To return to the New Client Form Request screen, press the **BACK** button ( ) on your browser.

Assessment Reports

The Assessment Report feature in NESIIS compiles an organization's immunization data into a useful format.

1. Click on **Assessment Report** under the Reports section of the menu panel.

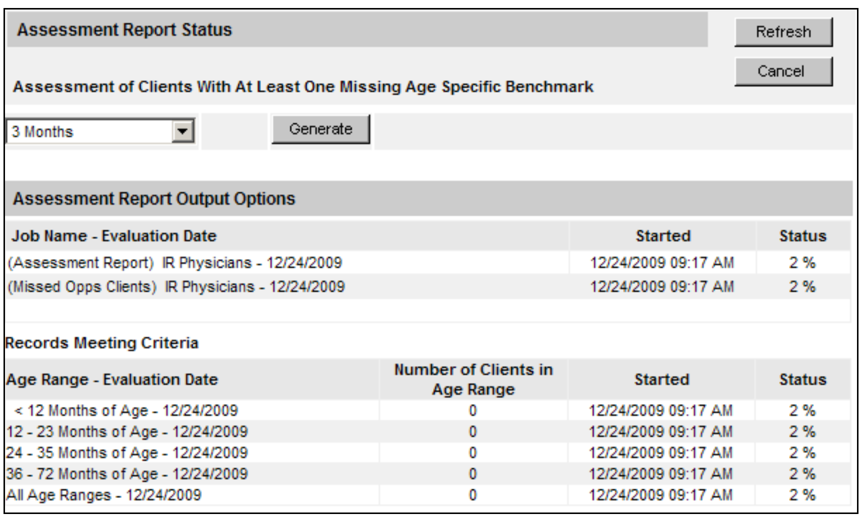


2. Select the client population to be assessed by clicking one of the following:
   - **Clients Associated with Selected Site**: Choose this option to view immunization data on all clients associated with the site selected from the pick list at the right of the dialog box.
   - **Clients Associated with <Organization Name>**: Choose this option to view immunization data on all clients with an active association with your organization.

   Clients with a status of "Permanently Inactive — Deceased" or "Moved Out of State" *for any organization* will be excluded from all options.
3. Select the age, birth date range, or age range of the clients by choosing one of the following:
   - **Less than or equal to 72 months old**: Choose this option to return all clients who are 72 months or younger.
   - **Birth date range**: Choose this option to enter a range of birth dates. Enter the earliest birth date in the first field and the latest birth date in the second field that you wish included on the report. Or, use the calendar icons ( ) beside each field to enter the dates.
   - **Age range**: Choose this option to enter an age range. Enter the youngest age in

the first field, then use the pick list next to it to choose days, months, or years. In the Oldest Age field, enter an age and use the pick list to choose days, months, or years.

4. Select either the Standard Assessment or the Assess Clients with Sufficient Refusal History as Covered option for the report by choosing the appropriate radio button ( ). Selecting the second option will return an assessment report that counts clients with sufficient refusal comments as being up-to-date.
5. Select the assessment report evaluation date by entering the date in the field provided or by using the calendar icon to enter the date. No immunizations administered after the evaluation date will be included in the report.
6. Press **GENERATE**.
7. The Assessment Report Status screen will display. Press **REFRESH** occasionally to check on the progress of the reports. When the reports are ready, the job names will appear underlined and in blue. At this screen you may do the following:



Assessment Report Status

Refresh

Cancel

Assessment of Clients With At Least One Missing Age Specific Benchmark

3 Months

Generate

Assessment Report Output Options

Job Name - Evaluation Date	Started	Status
(Assessment Report) IR Physicians - 12/24/2009	12/24/2009 09:17 AM	2 %
(Missed Opps Clients) IR Physicians - 12/24/2009	12/24/2009 09:17 AM	2 %

Records Meeting Criteria

Age Range - Evaluation Date	Number of Clients in Age Range	Started	Status
< 12 Months of Age - 12/24/2009	0	12/24/2009 09:17 AM	2 %
12 - 23 Months of Age - 12/24/2009	0	12/24/2009 09:17 AM	2 %
24 - 35 Months of Age - 12/24/2009	0	12/24/2009 09:17 AM	2 %
36 - 72 Months of Age - 12/24/2009	0	12/24/2009 09:17 AM	2 %
All Age Ranges - 12/24/2009	0	12/24/2009 09:17 AM	2 %

- Select an age from the pick list provided and press (to the right of the age pick list) if you wish to create an assessment report listing clients for an age-specific benchmark. This report lists the client's name, address, telephone number, and the vaccinations that they did or did not complete or refused by the benchmark age. A client will show on the report if they missed at least one age-specific benchmark.
- Click the underlined job name to view the assessment report.
  - The report listing clients by benchmark age will have a job name of: (Benchmark Client Listing) <Organization Name> - <Benchmark Age> - <Date>.
  - The assessment report will be called: (Assessment Report) <Organization Name> - <Date>.

Clients with Refusals

If the option to Assess Clients with Sufficient Refusal History as Covered is selected when the assessment report is run, clients who fall short of needed, valid doses but have sufficient refusals to meet the benchmark are included within the count as if they received the needed doses.

If a vaccine series has been completed early through acceleration or an alternate ACIP schedule, the client will be considered up-to-date for the vaccine. Client comments of “History of Varicella” or “Immunity of Varicella” with an applies-to date will also be considered up-to-date for all benchmarks on or after the date.

In order for NESIIS to show a benchmark as having been met, a client must have received the correct number of immunizations on or before the exact number of months elapsed since their date of birth. For example, a client with a birth date of 01/01/2007 needs to have a DtaP immunization on or before 04/01/2007 to meet the 3 month benchmark.

   - A report listing all clients who have missed a vaccination opportunity will have a job name of: (Missed Opps Clients) <Organization Name> - <Date>.
 - Click an underlined age range to view a listing of clients returned that fall within the specified range. This list will give the name, address, and telephone number for all clients meeting the record criteria. To view clients for all age ranges that meet the criteria, click on the All Age Ranges link.

8. The report displays in Adobe® Reader® if you clicked one of the report links or age range links. To print one of these reports, press the printer icon ( ) on the Adobe® toolbar.
9. Press **OK** in the Print dialog box.
10. To return to the Assessment Report Status screen, press the **BACK** button ( ) on your browser.

Understanding the Assessment Report

The following is a brief overview of the data that is returned on each table within the assessment report.

Age Group	Records Analyzed	Inactive	Records Meeting Criteria
36 -72 Months of Age	3	0	3
24 - 35 Months of Age	1	0	1
12 -23 Months of Age	5	0	5
< 12 Months of Age	0	0	0
Total	9	0	9

Age Group: This column displays the age ranges used for evaluation.

Records Analyzed: This column displays the count of selected clients within the age group that are included in this report.

Inactive: This column displays the count of selected clients within the age group that are not active.

Records Meeting Criteria: This column displays the count of selected clients within the age group.

Immunization Status		
Age(months)	Up-to-Date[1-4] (UTD)	Late[1-4] UTD@Assessment
36 - 72 Months of Age		
72	.0%	.0%
24	33.3%	33.3%
12	.0%	33.3%
7	.0%	33.3%
24 - 35 Months of Age		
24	.0%	.0%
12	.0%	.0%
7	.0%	.0%
12 - 23 Months of Age		
12	.0%	.0%
7	.0%	.0%
< 12 Months of Age		
7		

1) UTD by 7 months equals 3 DtaP, 2 HepB, 2 HIB, 2 Polio
2) UTD by 12 months equals 3 DTaP, 2 HepB, 2 HIB, 2 Polio.
3) UTD by 24 months equals 4 DTaP, 3 HepB, 3 HIB, 1 MMR, 3 Polio, 1 Varicella.
4) UTD by 72 months equals 5 DtaP, 3 HepB, 4 HIB, 2 MMR, 4 Polio, 1 Varicella.
Late UTD equals the same benchmark for the age group, but it is assessed on the date the report was run.

Age (Months): This column displays the age of the client on the assessment date.

Up-to-Date (UTD): This column displays the percent of clients (out of the total number of active clients for that age group) meeting the criteria on the assessment date. The criteria are given at the bottom of the report page. For example, a 7-month-old UTD client who has met the criteria will have had three DTaP, two HepB, two HIB, and two Polio vaccinations.

Late UTD @ Assessment: This column displays the percent of clients (out of the total number of active clients for that age group) meeting the criteria on the date the report was run, rather than on the assessment date.

Age Specific Immunizations Benchmarks							
UTD Grid	DTap	Hep B	Hib	MMR	Polio	Prevnar	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	4	3	3	1	3	3	1
@ 19 months	4	3	3	1	3	3	1
@ 21 months	4	3	3	1	3	3	1
@ 24 months	4	3	3	1	3	3	1
@ 72 months	5	3	4	2	4	4	1

The Age-Specific Immunization Benchmarks chart shows how many doses of each vaccine a client should have by the age listed at the left to be determined UTD. This chart is used to create the Assessment of Clients Meeting Age-Specific Benchmarks table.

Assessment of Clients Meeting Age Specific Benchmarks									
UTD Age	DTap	Hep B	Hib	MMR	Polio	Prevnar	Varicella	Total Meeting Age Criteria	% Coverage
3 Months	6	5	4		4	3		9	11.1%
5 Months	2	4	2		1	2		9	.0%
7 Months	1	5	2		2	2		9	.0%
9 Months	2	5	2		2	2		9	.0%
12 Months	2	6	2		3	2		9	.0%
16 Months	0	1	2	1	1	2	1	9	.0%
19 Months	1	1	3	2	1	2	2	9	11.1%
21 Months	1	1	3	2	1	2	2	8	12.5%
24 Months	1	1	3	2	1	2	2	4	25.0%
72 Months	0	0	0	0	0	0	0	0	

UTD Age: This column shows the maximum age the client has attained by the assessment date.

Vaccine Columns: These seven columns display the count of the clients who have met the vaccination criteria by the UTD age.

Total Meeting Age Criteria: This column gives a count of all the clients who are at least the age listed under UTD Age. However, the 72 Months UTD Age category includes clients from 48 to 72 months of age.

% Coverage: This column displays the percentage of clients meeting all UTD criteria, out of a total of all clients at least the age listed under UTD Age.

Children Who Could Have Been Brought Up-To-Date With Additional Immunizations		
<= 12 Months of Age	199	22.0%
1 Vaccine Needed	0	
2 Vaccines Needed	0	
3 Vaccines Needed	0	
4 Vaccines Needed	0	

Column 1: In the first row of column one, the age range of clients examined in this table is displayed. In subsequent rows within this column, the number of vaccines needed by the client is displayed.

Column 2: In the first row of column two, a count is displayed of all clients for this age group who are behind schedule for four or fewer vaccinations. Subsequent boxes display a count of clients for this age group who need additional vaccinations to be UTD.

Column 3: In the first row of column three, a percent is displayed of all clients for this age group who are behind schedule for four or fewer vaccinations (out of the total number of clients for this age group). Subsequent rows within this column display a percentage of clients for this age group who need additional vaccinations to be UTD.

Children Who Got A Late Start or Have Dropped Off Schedule After A Good Start			
Late Start Rates[1]	Beginning > 3 mo. age	33.3%	36-72 mo. age group
		100.0%	24-35 mo. age group
		80.0%	12-23 mo. age group
Drop Off Rates	60-72		24 month status[2]
	48-59		24 month status
	36-47	66.7%	24 month status
	24-35 mo. age	100.0%	24 month status
	12-23 mo. age	60.0%	12 month status[3]

1) A client who did not receive dose 1 of DTAP by 90 days is considered to have gotten a Late Start.
2) Drop off rate @ 24 months of age equals % of clients who had 1 DTaP by 6 months of age minus % of clients who had 4 DTaP by 24 Months.
3) Drop off rate @ 12 months of age equals % of clients who had 1 DTaP by 6 months of age minus % of clients who had 3 DTaP by 12 Months.

DTaP is the equivalent of a DTaP, a DTP or a DT.

Late Start Rates: A client who did not receive one full dose of DTaP by 90 days of age is considered to have gotten a late start. The values in column three of the late start row are the percentages of clients (within the age groups listed in column four) who have not received the first DTaP dose by 3 months of age.

Drop Off Rates: The drop off rate section of this chart shows the percentage of clients (column three) in various age groups (column two) who have not gone beyond a 12-or 24-month status (column four) in their immunizations. Immunization status is calculated using the formula outlined at the bottom of the chart.

Clients Who Do Not Have a Birth Dose of HepB and Have Not Completed the 3 Dose Series		
	Number[4]	Per Cent[5]
Clients Missing Birth Dose Of Hep B	5	55.6%

4) Count of Clients who do not have a birth dose and did not complete the 3 dose Hep B series. These clients must be between 6 months and 72 months old on evaluation date and have at least 1 immunization in NESIIS.
5) Per cent of all clients (between 6 and 72 months old with at least 1 immunization in NESIIS) who do not have a birth dose and did not complete the 3 dose Hep B series.

The Hep B chart gives the number and percentage of clients who did not receive a birth dose of the Hep B vaccination and who did not complete the three-dose series. Clients evaluated are between 6 and 72 months old and have at least one immunization in NESIIS.

Missed Opportunity Assessment

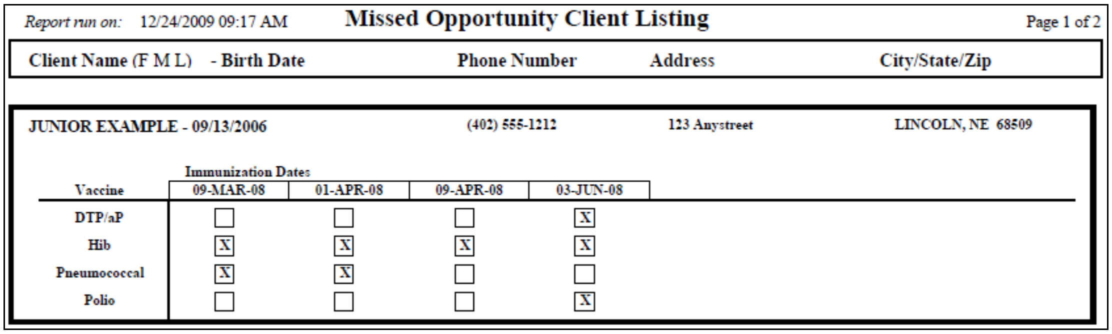
Age Group on Evaluation Date	Total Clients in Age Group	Clients Not up to Date		Missed Opportunity on Last Visit	
		Count	Percent	Count	Percent
<12 months 7 month benchmark					
12-23 months 12 month benchmark	5	0	0.0%	4	80.0%
24-35 months 24 month benchmark	1	0	0.0%	1	100.0%
36-72 months 24 month benchmark	3	2	66.7%	2	66.7%

Age Group on Eval Date: This column lists the age group of the selected clients and the immunization benchmark used for evaluation.

Total Clients in Age Group: This column gives the total number of clients within the age group listed in the first column.

Clients Not Up to Date: This column gives the count and percentage of clients who are not up to date for the benchmark listed in column one.

Missed Opp on Last Visit: This column gives the count and percentage of clients who are *not* up to date *and* who had a missed opportunity for vaccination on the last visit on or before the evaluation date.



Report run on: 12/24/2009 09:17 AM **Missed Opportunity Client Listing** Page 1 of 2

Client Name (F M L) - Birth Date	Phone Number	Address	City/State/Zip
JUNIOR EXAMPLE - 09/13/2006	(402) 555-1212	123 Anystreet	LINCOLN, NE 68509

Vaccine	Immunization Dates 09-MAR-08	01-APR-08	09-APR-08	03-JUN-08
DTP/aP				X
Hib	X	X	X	X
Pneumococcal	X	X		
Polio				X

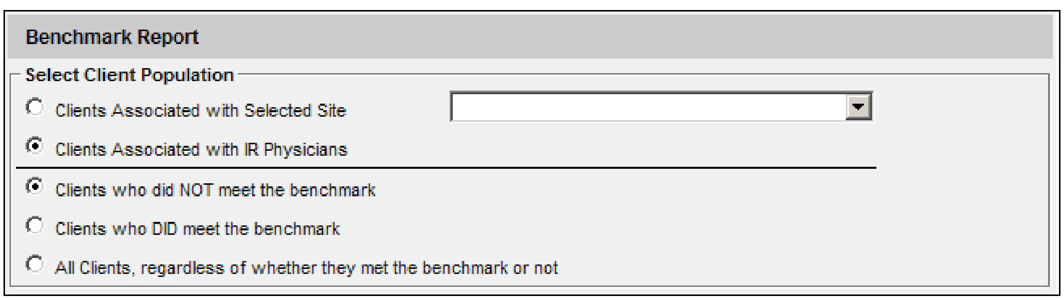
The missed opportunities report lists all your organization's clients who have missed opportunities to be vaccinated. This report lists the client's first and last names, birth date, and date of each missed opportunity by vaccine group. If a client had missed an opportunity to be vaccinated on his or her last visit, the message "Missed Opportunity on Last Visit" appears in the client's record.

Benchmark Reports

Benchmark reports allow NESIIS users to retrieve a list and count of clients who have met an immunization benchmark or predefined series of benchmarks. The resulting report may be viewed in NESIIS and exported as a text file, spreadsheet, or Portable Document Format (PDF) file.

To generate a benchmark report, follow these steps:

1. Click on **Benchmark Report** under the Reports section of the menu panel.



2. Select the client population to be assessed by clicking one of the following:
   - **Clients Associated with Selected Site**: Choose this option to view immunization data on all clients associated with the site selected from the pick list at the right of the dialog box.
   - **Clients Associated with <Organization Name>**: Choose this option to view immunization data on all clients with an active association to your organization.
   - **Clients Residing in <City or County Name>**: Choose this option to view immunization data on all clients within a given city or county. This option is only available for city or county organizations.
   - **Clients Associated with <Organization Name> AND Clients Residing in <City or County Name>**: Choose this option to view immunization data on clients associated

with your organization and those residing within a given county or city. This option is only available for city or county organizations.

- **Include or Exclude Clients residing in the following**: Choose this option to include or exclude clients residing in specified cities, census tracts, or ZIP codes without including any of the above options. This option is only available for city or county organizations.

Clients with a status of “Permanently Inactive — Deceased” or “Moved Out of State” *for any organization* will be excluded from all options.

3. Enter information to either include or exclude clients residing in specified cities, census tracts, or ZIP codes. This option is only available for city or county organizations. This function can be used on its own by selecting the last option under Step 2, or in conjunction with the “Associated with” or “Residing in” options under Step 2. Refer to the Include/ Exclude Examples in this step for more information. Click to select the following:

- **N/A**: Select this option if you wish to bypass the include/exclude function.
- **Cities**: Select this option to include or exclude one or more cities from the list provided. If this option is chosen, highlight a city to include or exclude, then press **ADD**. Repeat for each city to include or exclude.
- **Census Tracts**: Select this option to include or exclude one or more census tracts from the list provided. If this option is chosen, highlight a census tract to include or exclude, then press **ADD>**. Repeat for each census tract to include or exclude.
- **ZIP Codes**: Select this option to include or exclude one or more ZIP codes from the list provided. If this option is chosen, highlight a ZIP code to include or exclude, then press **ADD**. Repeat for each ZIP code to include or exclude.
- **Include/Exclude**: Select one of these options to either include or exclude the selected cities, census tracts, or ZIP codes from the Benchmark Report.

Include/Exclude Examples

Additional client population selections are available to city or county organizations to choose clients residing in a given city or county.

For these organizations, clients can be selected by cities, census tracts, or ZIP codes with the given city or county. These can be selected alone, or in combination with the “Associated with” or “Residing in” options.

The county shown on the Edit Organization screen will be used to match with the county that displays on the Manage Client screen. The city, census tract, and ZIP code are matched to the client’s primary address.

Example 1

The most common usage of the limitation by city is to allow a county organization with an embedded city organization to exclude the city when reporting on clients for which the county is responsible.

To do this, select the option “Clients Residing in <County Name>.” Then select “Cities” and “Exclude” in the Include/Exclude section. Choose a city and press **ADD>**.

Example 2

A county organization with an embedded city organization may wish to report on all the clients it has served that reside in the city health department’s area. The resulting data would provide the county organization with the clients it has served that belong to the city organization.

To do this, select “Clients Associated with <Organization Name>.” Then select “Cities” and “Include” in the Include/Exclude section. Choose the city and press **ADD>**.

Example 3

A city organization may wish to focus on a single census tract.

To do this, select “Include or Exclude Clients Residing in the Following,” then select “Census Tracts” and “Include” in the Include/Exclude section. Choose a census tract and press **ADD>**.

Example 4

A county organization may wish to report on all but one ZIP code.

To do this, select “Include or Exclude Clients residing in the following, ”then select “ ZIP Codes” and “Exclude” in the Include/Exclude section. Choose the one ZIP code to be excluded, then press **ADD>**.

Examples for City Organizations

NESIIS will provide a city organization with only its own city on the “Cities” list in the Include/Exclude section.

Options for city organizations include the following:

- Use “Clients Residing in the city of <City Name>”to select all clients with a matching city, regardless of the county.
- Use “Include or Exclude Clients residing in the following” and select “Cities” and “Include” in the Include/Exclude section. Then select the one city listed in the “Cities” list to select all clients within a matching county (or no specified county).

If a vaccine series has been completed early through acceleration or an alternate ACIP schedule, the client will be considered up-to-date for the vaccine. Client comments of “History of Varicella” or “Immunity of Varicella” with an applies-to date will also be considered up-to-date for all benchmarks on or after the date.

In order for NESIIS to show a benchmark as having been met, a client must have received the correct number of immunizations on or before the exact number of months elapsed since their date of birth. For example, a client with a birth date of 01/01/2007 needs to have a DtaP immunization on or before 04/01/2007 to meet the 3-month benchmark.

Exporting the benchmark report in a PDF file will allow you to print the report as a whole, rather than one page at a time. To view PDF files, you will need to have Adobe® Reader® installed on your computer.

Note: If you press the Back button on your browser, you may receive a “Page has Expired” message. As instructed on the screen, you can press your Refresh button then click on “Retry” to return to the status screen.

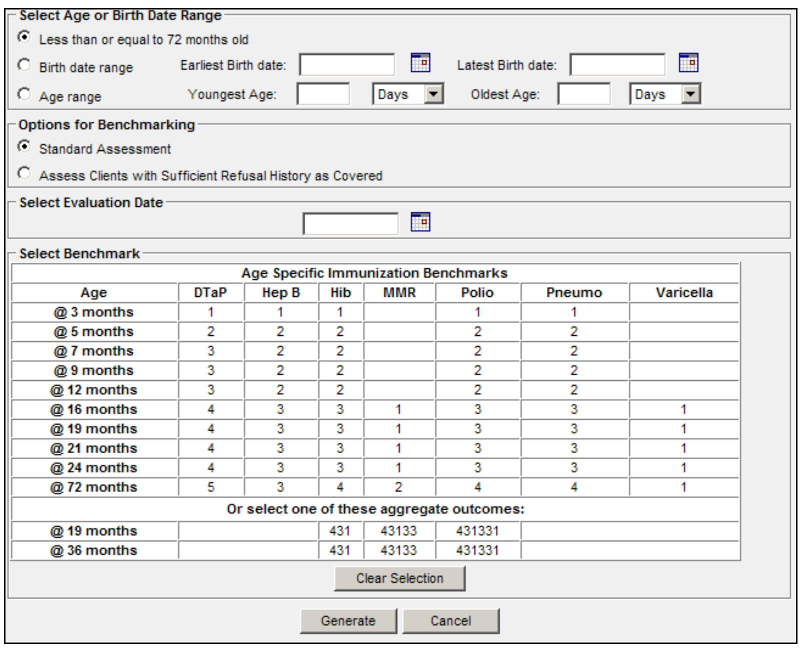
Refusals of Vaccine

In order for client refusals of vaccine to be calculated correctly on assessment and benchmark reports, an appropriate Applies-to-Date must be entered for refusal comments on the Client Comments tab. Refer to the Managing Clients chapter of this manual for more information.

- Use “Clients Residing in the city of <City Name>,”then select “Cities” and “Exclude” in the Include/Exclude section. Then select the one city in the “Cities” list to identify only those clients with a matching city, but a different county.

4. Click one of the following to specify the clients to return on the report:

    - Clients who did NOT meet the benchmark: Choose this option to return a list of clients who did not meet the benchmark(s) defined in the table.
    - Clients who DID meet the benchmark: Choose this option to return a list of clients who met the benchmark(s) defined in the table.
    - All clients, regardless of whether they met the benchmark or not: Choose this option to return a list of all clients meeting the criteria defined on this screen.



Age Specific Immunization Benchmarks							
Age	DTaP	Hep B	Hib	MMR	Polio	Pneumo	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	4	3	3	1	3	3	1
@ 19 months	4	3	3	1	3	3	1
@ 21 months	4	3	3	1	3	3	1
@ 24 months	4	3	3	1	3	3	1
@ 72 months	5	3	4	2	4	4	1
Or select one of these aggregate outcomes:							
@ 19 months			431	43133	431331		
@ 36 months			431	43133	431331		

5. Select the age, birth date range, or age range of the clients by choosing one of the following:

    - **Less than or equal to 72 months old**: Choose this option to return all clients who are 72 months old or younger.
    - **Birth date range**: Choose this option to enter a range of birth dates. Enter the earliest birth date in the first field and the latest birth date in the second field that you wish included on the report, or use the calendar icons beside each field to enter the dates.
    - **Age range**: Choose this option to enter an age range. Enter the youngest age in the first field, then use the pick list next to it to choose days, months, or years. In the Oldest Age field, enter

an age and use the pick list to choose days, months, or years.

6. Select either the Standard Assessment or the Assess Clients with Sufficient Refusal History as Covered option for the report by choosing the appropriate radio button (◉). Selecting the second option will return a benchmark report that counts clients with sufficient refusal comments as being up-to-date.
7. Select the report evaluation date by entering the date in the field provided or by using the calendar icon to enter the date. No immunizations administered after the evaluation date will be included in the report.
8. Select the benchmark(s) to be used on the report:
   - To select one or more single vaccine benchmarks within a single row, click the box where the vaccine and the number of months intersect. For example, clicking the box with "4" in it where "DTaP" and "@ 19 months" intersect will result in a report with this benchmark included.
   - To select all benchmarks in a row, you may click on the first box in the row that indicates "@ X months."
   - To select benchmarks in a predefined series, select one of the 431, 43133, or 431331 combinations at the bottom of the table.
9. Press **GENERATE**.
10. The Benchmark Report Status screen will display. Press **REFRESH** occasionally to check on the progress of the report. When the report is ready, click "Benchmark," which will appear underlined and in blue. Once this link is clicked, NESIIS will display the benchmark report at the bottom of the Benchmark Report Status screen. In addition, you may do one of the following:
    - Click the "Export as Text" link to display the report in text file format.
    - Click the "Export as a Spreadsheet" link to display the report in a spreadsheet format.
    - Click the "Display as a PDF" link to display the report in Adobe® Reader®.

Large Reports

The size of your file is not limited when you choose to export the benchmark report as text. However, the export as a spreadsheet option has a limit of 65,535 lines; the informational message "file not loaded completely" will display to indicate that part of the report was truncated. When the report is displayed as a PDF, the report will be limited to about 5,000 lines (119 pages); if you choose the PDF link and the report is larger than 5,000 lines, a red error report banner will display.

Ad Hoc Reports

The Ad Hoc Reports function in NESIIS allows the user to create customized reports. Filters within the Ad Hoc Reporting function help to narrow a search by date, site, vaccine group, ethnicity, and other factors. City and county public health departments may include in their reports clients associated with their departments or those living within the same city or county.

The Ad Hoc reporting function produces two types of reports; one type produces lists with information about selected clients, the other type produces counts, either of clients or of immunizations.

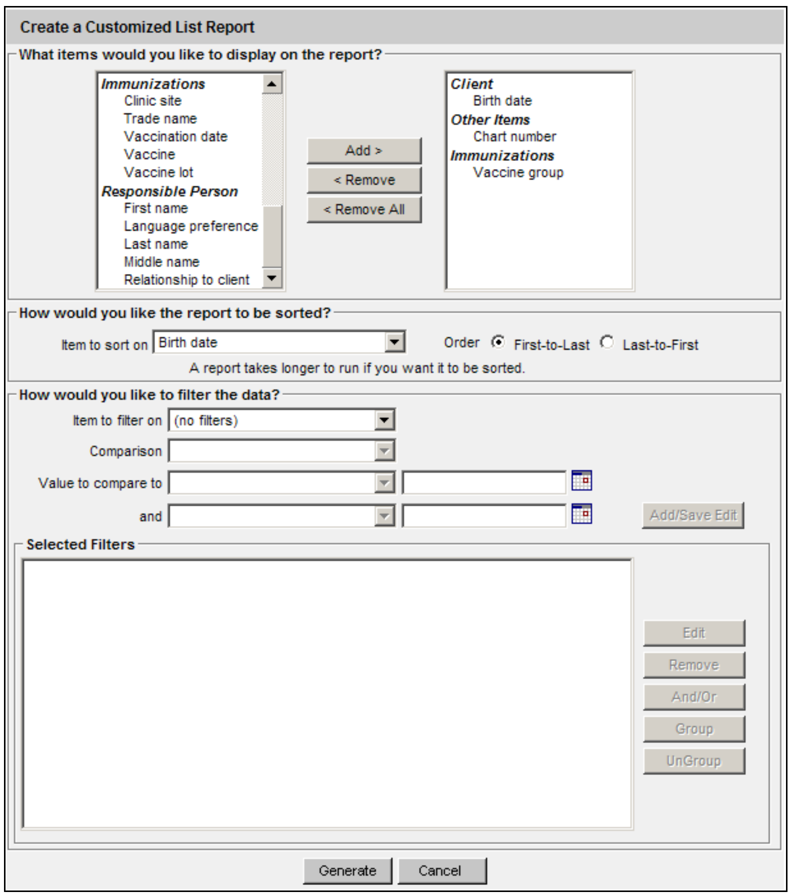
Note: Clients whose information is added or changed on the day the report is run may not appear in the results until the following day.

Filters in NESIIS are used to narrow information down so that it answers a user's query or can be used elsewhere. An example of a filter item would be Birth Date Range (Item to filter on) BETWEEN (Comparison) 01/01/2004 (Value to compare to) AND 12/31/2004 (And).

Ad Hoc List Reports

To produce a list of information about selected clients, follow these steps:

1. Click on **Ad Hoc List Report** under the Reports section of the menu panel.



2. Select the items that you would like to display on the report by double-clicking on the desired item from the left column (for example, Client Last Name) or by highlighting the item and pressing **ADD>**. This will copy the item to the right column and add it to your report.
3. Select the single item by which you would like to have the report sorted and click on the sort order (first-to-last or last-to-first).

Note: Sorting the report will increase the time it takes to process.

4. Under “Item to filter on,” select an item that you would like to add as a filter using the pick list provided. For example, “Birth Date Range” could be an item used as a filter.
5. Under “Comparison,” select a word from the pick list that best describes the type of comparison you wish to make. For example, “Between” is one comparison operator.
6. Under “Value to compare to,” either choose a value from the pick list in the left field or enter a beginning date in the right field.
7. Under “and,” select another value from the pick list in the left field or enter the ending date in the right field, if applicable.
8. Press **ADD/SAVE**. Repeat Steps 4-8 for each item you wish to use as a filter.
9. When finished adding filter items, you may do the following:
   - Group them together by highlighting two filter statements and pressing **GROUP**.
   - Highlight an AND or an OR statement and press **AND/OR** to change it.
   - Highlight a grouped statement and press **UNGROUP** to ungroup it.
   - Highlight a statement and press **REMOVE** to remove it from the selected filters.
   - Highlight a statement and press **EDIT** to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and press **ADD/SAVE**.
10. Press **GENERATE**. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.

Exporting an ad hoc report in a PDF file will allow you to print the report as a whole, rather than one page at a time.

Note: If you press the Back button on your browser, you may receive a “Page has Expired” message. As instructed on the screen, you can press your Refresh button then click on “Retry” to return to the status screen.

Ad Hoc Count Report

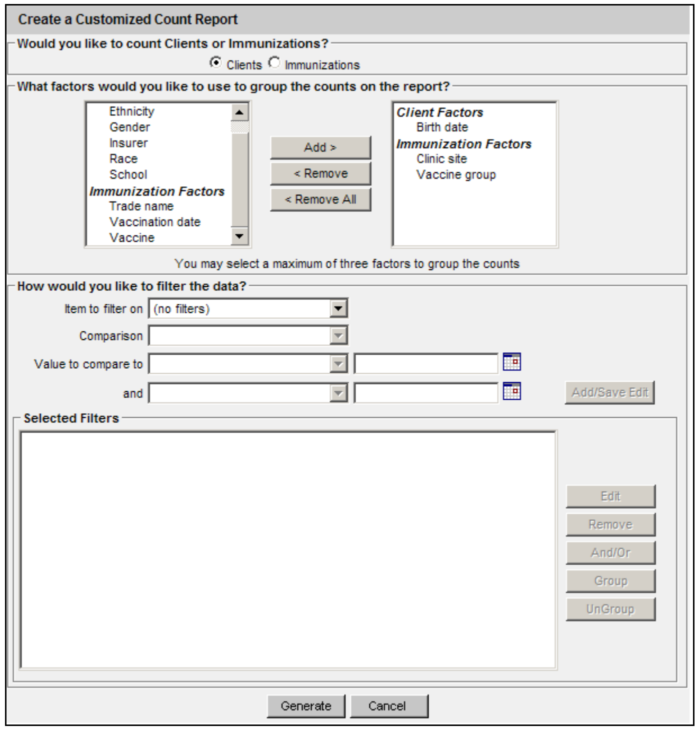
To produce a count of selected clients or immunizations, follow these steps:

1. Click **Ad Hoc Count Report** under the Reports section of the menu panel.
2. Select whether Clients or Immunizations will be counted by clicking the appropriate radio button () at the top of the screen.

Ad hoc reports are retained for 72 hours; NESIIS will retain one count report and one list report for that period of time. If a new report of the same type is generated, the new report will replace the existing report.

Large Reports

The size of your file is not limited when you choose to export the ad hoc report as text. However, the export as a spreadsheet option has a limit of 65,535 lines; the informational message "file not loaded completely" will display to indicate that part of the report was truncated. When the report is displayed as a PDF, the report will be limited to about 5,000 lines (119 pages); if you choose the PDF link and the report is larger than 5,000 lines, a red error report banner will display.



3. Select the factors you would like to use to group the counts on the report by double-clicking on the desired item from the left column (for example, Vaccine Group) or by highlighting the item and pressing **ADD**. This will copy the time to the right column so that it can be used in your report.
4. Under "Item to filter on" select an item that you would like to add as a filter using the pick list provided. For example, "Birth Date Range" could be an item used as a filter.
5. Under "Comparison," select a word from the pick list that best describes the type of comparison you wish to make. For example, "Between" is one comparison operator.
6. Under "Value to compare to," either choose a value from the pick list in the left field or enter a beginning date in the right field.
7. Under "and," select another value from the pick list in the left field or enter the ending date in the right field, if applicable.
8. Press **ADD/SAVE**. Repeat Steps 4-8 for each item you wish to filter.
9. When finished adding filter items, you may do the following:
   - Group them together by highlighting two filter statements and pressing **GROUP**.
   - Highlight an AND or an OR statement and press **AND/OR** to change it to an AND or an OR.
   - Highlight a grouped statement and press **UNGROUP** to ungroup it.
   - Highlight a statement and press **REMOVE** to remove it from

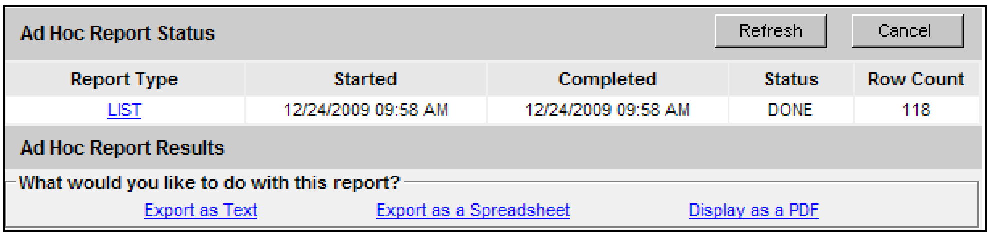
the selected filters.

- Highlight a statement and press **EDIT** to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and press **ADD/SAVE**.

10. Press **GENERATE**. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.

Ad Hoc Report Status

1. The Ad Hoc Report Status screen will display after you press **GENERATE** on the Ad Hoc Count or Ad Hoc List Report screens, or you may access the status screen by clicking Ad Hoc Report Status under the Reports section of the menu panel.

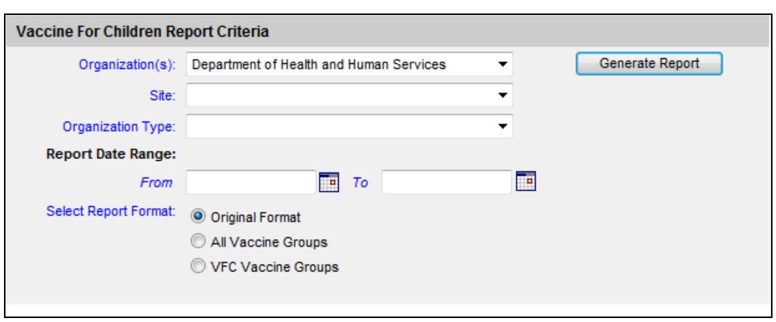


2. Press **REFRESH** occasionally to check the status of the report. Once the underlined report name appears (either List or Count), click it. The report will display directly on this screen.
3. If you wish to export the data as a text file, spreadsheet, or PDF, select the appropriate link.
4. If you wish to print the report, click on **Print** under the **File** menu within the application (text file, spreadsheet, or Adobe® Reader®). In the print dialog box, adjust the print options as necessary, then press either **PRINT** or **OK**, depending on the application.

Vaccines for Children Reports

The Vaccines for Children (VFC) Report details the number of clients that are vaccinated by your organization for each eligibility type for a specified date range. To generate a VFC Report, follow these steps:

1. Click **Request VFC Reports** under the Reports section of the menu panel.



2. Select the organization name from the pick list.
3. If your organization has multiple sites, then you can easily filter your results by site.
4. Enter a From date under the Report Date Range using the MMDDYYYY format.
5. Enter a To date under the Report Date Range using the MMDDYYYY format.
6. Select the Report Format you would like to run (original, all vaccines groups, or VFC vaccine groups).
7. Press **GENERATE REPORT**.
8. The form displays in Adobe® Reader®.
9. To print the report, press the printer icon () on the Adobe® toolbar.
10. Press **OK** in the Print dialog box.
11. To return to the Vaccines for Children Report Criteria screen, press the **BACK** button () on your browser.

Understanding the Vaccines for Children Report

The following section explains the rows and columns within the VFC report. The report only displays vaccines administered from the organization's inventory.

	Medicaid		American Indian/ Alaskan Native		Uninsured		Underinsured		Eligibility Not Det/ Unknown		Insured, Vaccine Covered		SVAP		Medicare			
	Imms	Distinct Clients	Imms	Distinct Clients	Imms	Distinct Clients	Imms	Distinct Clients	Imms	Distinct Clients	Imms	Distinct Clients	Imms	Distinct Clients	Imms	Distinct Clients	Sum of Immunizations	Sum of Distinct Client
<1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Annualized	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
=1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Annualized	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
=2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Annualized	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3-5	5	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	5	2
Annualized	59	24	0	0	0	0	0	0	0	0	0	0	0	0	0	0	59	24
=6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Annualized	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7-10	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
Annualized	12	12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	12	12
11-12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Annualized	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13-18	3	1	0	0	0	0	0	0	1	1	0	0	0	0	0	0	4	2
Annualized	35	12	0	0	0	0	0	0	12	12	0	0	0	0	0	0	47	24
19-24	0	0	0	0	0	0	0	0	1	1	0	0	0	0	0	0	1	1
Annualized	0	0	0	0	0	0	0	0	12	12	0	0	0	0	0	0	12	12
25-44	0	0	0	0	0	0	0	0	3	3	0	0	0	0	0	0	3	3
Annualized	0	0	0	0	0	0	0	0	35	35	0	0	0	0	0	0	35	35

The rows on the report break down the immunizations and clients by age in years. A client who receives a vaccination when he or she is six years and 11 months old will be included in the 1-6 age group.

Row	Description
< 1	This row includes doses given to clients who were under one year of age at the time the dose was administered.
1-6	This row includes doses given to clients who were from one to six years of age at the time the dose was administered.

7-18	This row includes doses given to clients who were from seven to 18 years of age at the time the dose was administered.
19+	This row includes doses given to clients who were 19 years of age or older at the time the dose was administered.
Annualized	NESIIS computes annualized estimates by using actual immunization and client counts in each age group and applying a multiplier to estimate a yearly amount. For example, if a report was run for 01 /01 /2006 to 01 /31 /2006, the number in the annualized row will be roughly 12 times the actual counts.

The columns on the report break down the immunizations and clients by eligibility.

Column	Description
Eligibility Not Det/Unknown:	The immunization is associated with a client who does not have any eligibility at all or has V00-Eligibility Not Det/Unknown in his or her client record.
Insured, Vaccine Covered:	The immunization is associated with a client who has V01-Insured Vaccine Covered in his or her client record. This client is not VFC eligible.
Medical Assistance including SVAP:	The immunization is associated with a client who has either V02-Medical Assistance or NE01-SVAP (or both) in his or her client record. This client is not VFC eligible; this is a state-specific eligibility.
Uninsured (No Insurance):	The immunization is associated with a client who has V03-No Insurance in his or her client record. This client is VFC eligible.
Native American/Alaskan Native:	The immunization is associated with a client who has V04-Native American/Alaskan Native in his or her client record. This client is VFC eligible.
Insurance, No Vaccine:	The immunization is associated with a client who has V05-Insurance, No Vaccine in his or her client record.
Medicare:	The immunization is associated with a client who has NE02-Medicare in his or her client record. This client is not VFC eligible.

Sub-Column	Description
Imms:	This sub-column counts the number of immunizations given within the date range specified to clients with this eligibility.

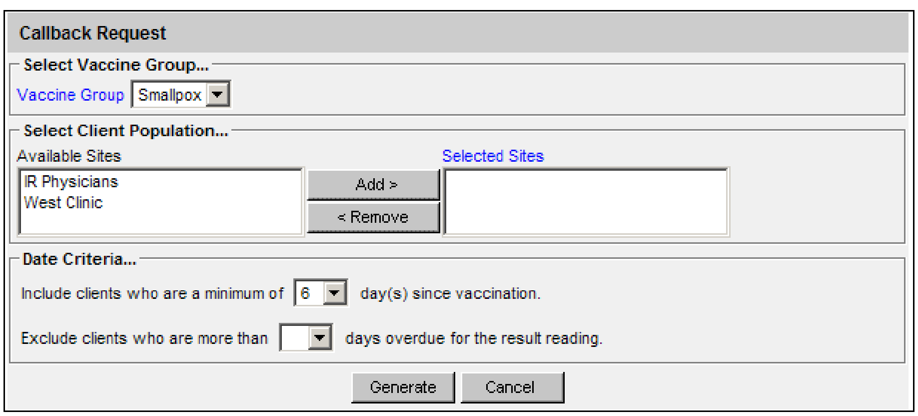
Distinct Clients: This sub-column counts the number of distinct clients associated with the immunizations given within the date range specified for this eligibility. Note that a single client who received three doses would contribute +3 to the Imms column but only +1 to the Distinct Clients column.

Eligibility	**Rank**
Insured, Vaccine Covered	1
Medicaid	2
Native American/Alaskan Native	3
Uninsured (No Insurance)	4
Underinsured	5
Medicare	6
SVAP	7
Uninsured (Adult)	8
Underinsured (Adult)	9
Eligibility Not Known or None	10

Callback Lists

To generate a take response reading callback list, follow these steps:

1. Click **Request Callback** under the Reports section of the menu panel.



2. Select the vaccine group using the pick list.
3. Select the site(s) for which you wish to generate callbacks by highlighting each desired Available Site and pressing **ADD>**. To remove a selected site, highlight the site under Selected Sites and press <**REMOVE**.
4. Enter the minimum number of days that must elapse following the vaccination under Date Criteria.
5. Enter the number of days past which you wish to exclude clients from the callback list.

6. Press **GENERATE**.
7. The callback list will display.

13 Appendix 1

In this chapter:

Online Help

NESIIS Help Desk

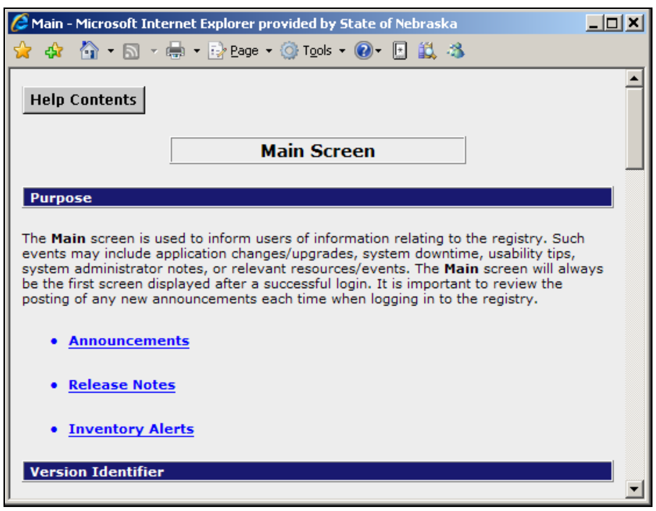
Online Help

NESIIS's online help function provides you with both screen-specific help and a general help index. You may access online help from any screen in NESIIS by pressing the yellow light bulb ( ) on the menu bar in the right corner of the screen.

Screen-Specific Help

To access screen-specific help, follow these steps:

1. Press the **light bulb** ( ) on the menu bar of the screen on which you would like help.
2. A box with screen-specific help information will display. This help box may have any or all of the following features:



- **Purpose**. This section describes what the screen is meant to do or what kind of information needs to be entered.
- **Required fields**. This section lists the required fields on the screen and describes the information needed for these fields.
- **Other fields**. This section lists and describes non-required fields.
- **Information provided**. This section lists the information that may be found on the screen.
- **Functionality**. This section gives step-by-step instructions on how to enter information on the screen or features on the screen and describes their function.
- **Results**. This section describes the outcome of a search, report, download, or other information entered into the database.
- **User tips**. This section has advice or further information on how to use this screen.

3. To view these features, you may either click the links under the Purpose section or

scroll down the box.

4. To close the help box, press the button in the top right corner of the box.

General Help

General help contains information on screens throughout NESIIS. You may access this information by viewing the contents of general help, by viewing or searching the general help index, or by searching general help using a keyword.

NESIIS's online help function includes a notes feature. Notes appear underlined and in red type; click on the **NOTE** link to view.

Contents of general help

To access the contents of general help, follow these steps:

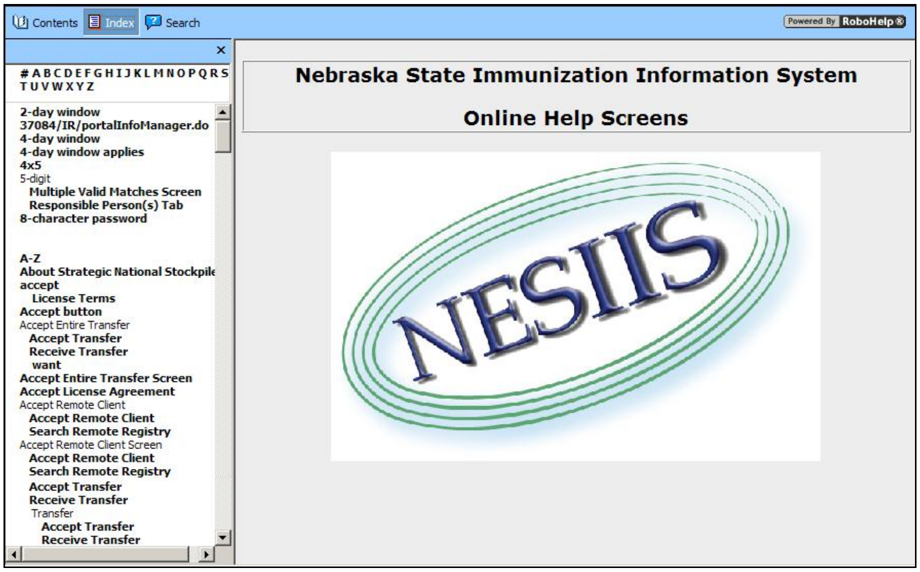
1. Press the light bulb ( ) on the menu bar.
2. Press the **HELP CONTENTS** button in the top left corner of the help box.
3. A box may open asking if you want to display both secure and non-secure items; press **YES**.

4. Press the ( ) sign to the left of "NESIIS" on the left side of the Contents box. A list of index items will display, with a ( ) sign to the left of each.
5. Press the ( ) sign next to the index item you wish to view. A list of help items will appear.
6. Click on the name of the help item to view it. You may also click on the document icon next to the help item.
7. The help information you selected will display on the right side of the help box.
8. Use the links at the top of the screen or scroll down to view the information you need.
9. To collapse an index item, press the ( ) sign next to the item.
10. To close out of the help box, press the button in the top right corner of the box.

Viewing/searching the general help index

To view or search the general help index, follow these steps:

1. Follow Steps 1-3 under *Contents of general help.*
2. Press the Index tab on the top left side of the help box.

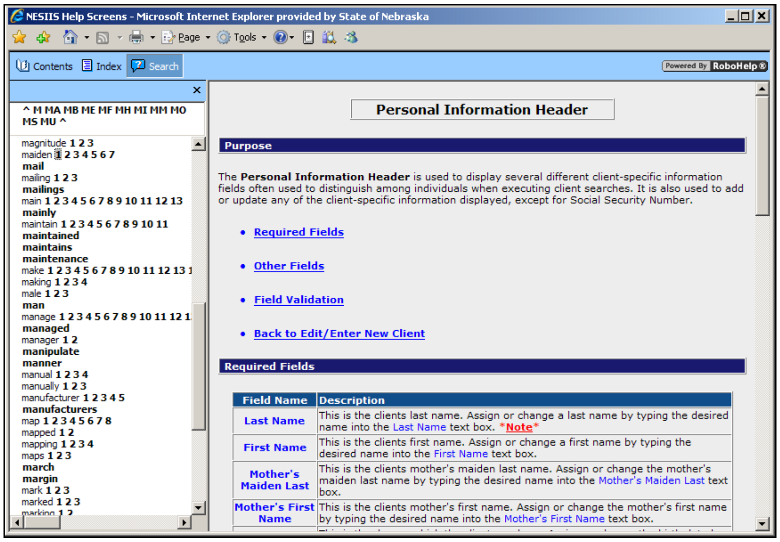


3. To find an index topic, do one of the following:
4. Use the scroll bar to view index topics.
5. Enter a keyword in the field provided. As you type, the index will display help items containing the letters you enter.
6. Click on one of the help items to view the item.
7. The help information you selected will display on the right side of the help box.
8. To close out of the help box, press the ☒ button in the top right corner of the box.

Searching general help

To search general help using a keyword, follow these steps:

1. Follow Steps 1-3 under *Contents of general help.*
2. Press the Search tab on the top left side of the help box.
3. Type in a word to search for in the field provided.
4. Press **Enter**.
5. Click on one of the help items in the box below the search field to view the item.



6. The help information you selected will display on the right side of the help box.
7. Use the links at the top of the screen or scroll down to view the information you need.
8. To return to a previous help screen or to skip ahead one screen, use the box's BACK and FORWARD buttons.
9. To close out the help box, press the ☒ button in the top right corner of the box.

NESIIS Help Desk

If you are experiencing difficulties or have questions regarding NESIIS, you may contact the NESIIS Help Desk. Several individuals staff the help desk. All calls are logged and tracked through to completion; calls are put in a pending status until a remedy to the user's problems is found.

The NESIIS Help Desk hours are 8:00 a.m. to 5:00 p.m. (CST), Monday through Friday.

Help Desk telephone number: (888) 433-2510

Help Desk e-mail address: dhhs.nesiis@nebraska.gov

If you experience any problems accessing or dealing with the help desk, please contact the NESIIS Administrator, at (888) 433-2510 or dhhs.nesiis@nebraska.gov

14 Appendix 2

In this chapter:

Validation of Client Entry Data

NESIIS validates the information you enter on the client screen when you attempt to save the entries. If you have entered data that NESIIS considers invalid, a message will appear asking you to re-enter data in the field(s). Validation varies depending on the field. Refer to the chart below for information on validation of data in various fields.

Field Name	Web Page/Section	Characters Allowed
First Name	Enter New Client/Personal Information, Manage Client/Personal Information	Allow only alpha characters, dashes, and apostrophes. Do not save an entry that matches a disallowed name.
Middle Name	Enter New Client/Personal Information, Manage Client/Personal Information	Allow only alpha characters, dashes, apostrophes, and periods.
Last Name	Enter New Client/Personal Information, Manage Client/Personal Information	Allow only alpha characters, dashes, apostrophes, and periods. Do not save an entry that matches a disallowed name.
Social Security Number	Enter New Client/Personal Information, Manage Client/Personal Information	Allow only numeric characters and do not allow repeating or sequential strings.
Mother's First Name	Enter New Client/Personal Information, Manage Client/Personal Information	Allow only alpha characters, dashes, and apostrophes.
Mother's Maiden Name	Enter New Client/Personal Information, Manage Client/Personal Information	Allow only alpha characters, dashes, and apostrophes.
Responsible Party First Name	Enter New Client/Responsible Person(s), Manage Client/Responsible Person(s)	Allow only alpha characters, dashes, and apostrophes.
Responsible Party Middle Name	Enter New Client/Responsible Person(s), Manage Client/Responsible Person(s)	Allow only alpha characters, dashes, apostrophes, and periods.
Responsible Party Last Name	Enter New Client/Responsible Person(s), Manage Client/Responsible Person(s)	Allow only alpha characters, dashes, and apostrophes.
Street Address	Enter New Client/Responsible Person(s), Manage Client/Responsible Person(s)	Allow alpha or numeric characters, backslashes, number symbols, dashes, periods, and apostrophes. Do not save quotes. Do not save an entry that matches a disallowed address.
Other Address	Enter New Client/Responsible Person(s), Manage Client/Responsible Person(s)	Allow alpha or numeric characters, backslashes, number symbols, dashes, periods, and apostrophes. Do not save quotes. Do not save an entry that matches a disallowed address.

PO Box	Enter New Client/Responsible Person(s), Manage Client/Responsible Person(s)	Allow alpha or numeric characters, backslashes, number symbols, dashes, and periods. Do not save an entry that matches a disallowed address. Do not save quotes.
E-mail Address	Enter New Client/Responsible Person(s), Manage Client/Responsible Person(s)	Must contain "@" symbol and period. Do not save quotes.
Phone Number	Enter New Client/Responsible Person(s), Manage Client/Responsible Person(s)	Allow only numeric characters and dashes. Do not save quotes.
City	Enter New Client/Responsible Person(s), Manage Client/Responsible Person(s)	Allow only alpha characters, dashes, and apostrophes. Do not save quotes.
Zip	Enter New Client/Responsible Person(s), Manage Client/Responsible Person(s)	Allow only numeric characters. Do not save quotes.

Disallowed Address Entries

The following chart lists address entries that will not be validated in NESIIS.

Disallowed Address Entries	
DO NOT USE	NO CURRENT
UNKNOWN	MOVED
GENERAL DELIVERY	UPDATE
DECEASED	MAIL RETURNED
ADDRESS	COMMENT
FAMILY PLANNING	FAMILY PLANNING SERVICES
PLANN PARENTHOO	PLANNED PARENTHOOD

Disallowed First Name Entries

The following chart lists first name entries that will not be validated in NESIIS.

Disallowed First Names			
ADOPT	GIRL II	INFANTMALE	TSWV
ADOPTIVE	HBS	LCFS	TXWM
AF BABY	HRH	LSS	UNK
BB	I	LSS BABY	UNKN
BABY	ILLEGIBLE SIGNATURE	LWG	UNKNOWN
BABY B	INF	MALE	UNKNOEN
BABY BOY	INFANT	MR	UNKOWN
BABY G	INFANT BO	MRS	UNNAMED
BABY GIRL	INFANT BOY	MS	UNREADABLE
BABYB	INFANT FE	NEWBORN	V
BABYBOY	INFANT FEM	NFN	WLCFS
BABYGIRL	INFANT G	NTXHW	XWM
BG	INFANT GI	PARENT	XXX
BOY	INFANT GIR	PARENTS	
BOY I	INFANT GIRL	PENDING	
BOY II	INFANT GRL	PVN	
CC	INFANT M	SIGNATURE	
CHILD	INFANT MA	SLKDFSLKD	
CSS	INFANT MAL	SRM	
FEMALE	INFANTBOY	THWJ	
FIRE DEPT	INFANTGIR	TOMORROW'S CHILDREN	
GIRL	INFANTGIRL	TSWJ	
GIRL I	INFANTMAL	TSWM	

Disallowed Last Name Entries

The following chart lists last name entries that will not be validated in NESIIS.

Disallowed Last Names			
ADOPT	CSS	LS	UNKNOWN
ADOPTIVE	CSS BABY	LSDKFSLDK	UNKNOEN
A BABY	CSSW	LSS	UNKOWN
A F BABY	D S S	LSSFC	UNNAMED
AF	DCS	LT JR	UNREADABLE
AF BABY	DFS	M BABY	V
AF BABY BO	DSS	M BABY BOY	V BABY
AF BABY GI	E BABY	MALE	VLK
AFBABY	F BABY	NEWBORN	WLCFS
B C S	FF	NLN	Z BABY
B S C	FIRE DEPT	O BABY	
BABY	FWV	P BABY	
BABY BOY	G BABY	PCS	
BABYBOY	GARCIA INF	PENDING	
BABY GIRL	GIRL	R BABY	
BABYGIRL	GSST	S B A	
BCS	H BABY BOY	S BABY	
BCSW	I	S C I	
BOY	INFANT	SB	
BRT	INFANT BOY	SC	
BSC	INFANT FEM	SIGNATURE	
C A C	INFANT GIRL	SMRT	
C S	INFANTBOY	SRB	
C S S	INFANTGIRL	SRFC	
CAC	INFANTMALE	SRP	
CBS	L S S	SS	
CC	LCFD	T A O	
CCS	LCFS	UN	
CFCFS	LCSF	UNK	
CS	LNAME	UNKN	

15 Appendix 3

In this chapter:

Cheat Sheets:

How do I enter a new immunization?

How do I enter a historical immunization?

How to edit VFC profile?

How to manage inventory?

How to modify inventory?

How to create/modify/cancel vaccine order?

How to accept vaccine order?

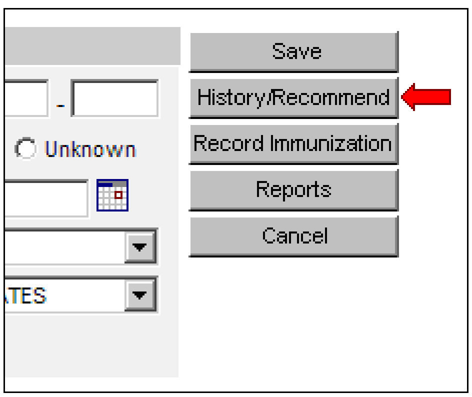
How to transfer inventory?

How to ADD “NEW” immunizations using your own inventory

1. Click on **Manage Client**.

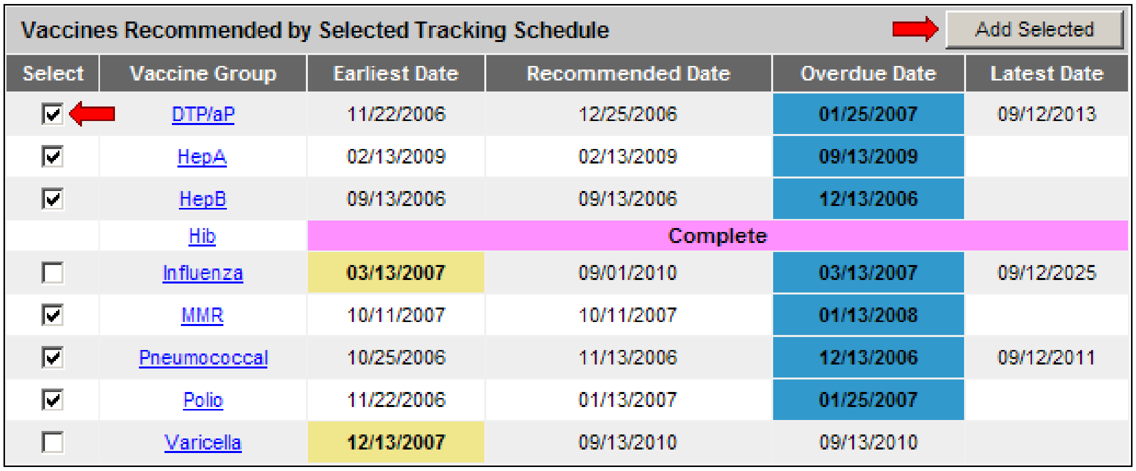
2. Search for the Client by entering last name, first name, and/or DOB, then press **FIND**.
   a. If the client does not exist, select **enter new client** and fill in at least the blue required fields (Mother’s Maiden name, can be left blank, if unknown). If you have address information, please enter it in the address section.
   b. Click **SAVE** when finished.

3. Click on **HISTORY/RECOMMEND**.

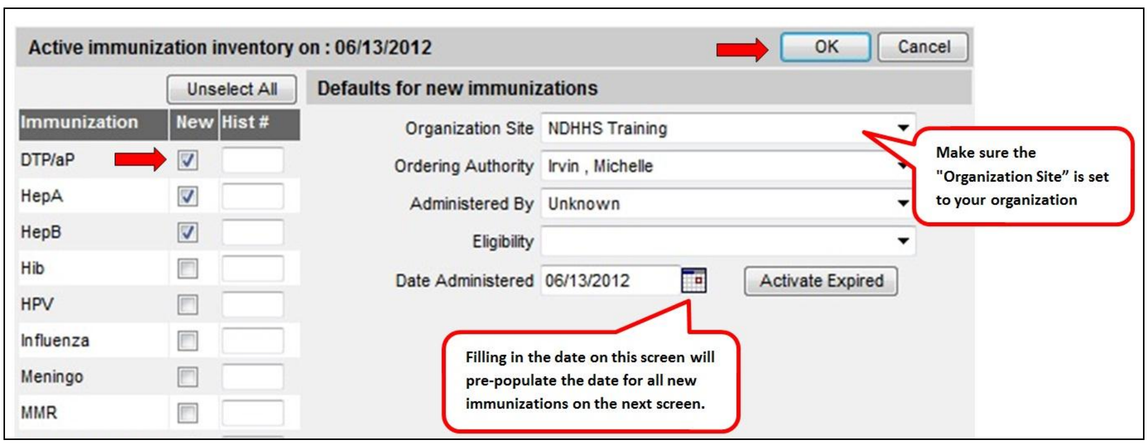


4. Look through the Client’s immunization history as well as the “Vaccines Recommended by Selected Tracking Schedule” section.
   a. From this list, you may determine which vaccines are recommended for the present time. Check or uncheck the appropriate boxes of vaccines to be administered that day.

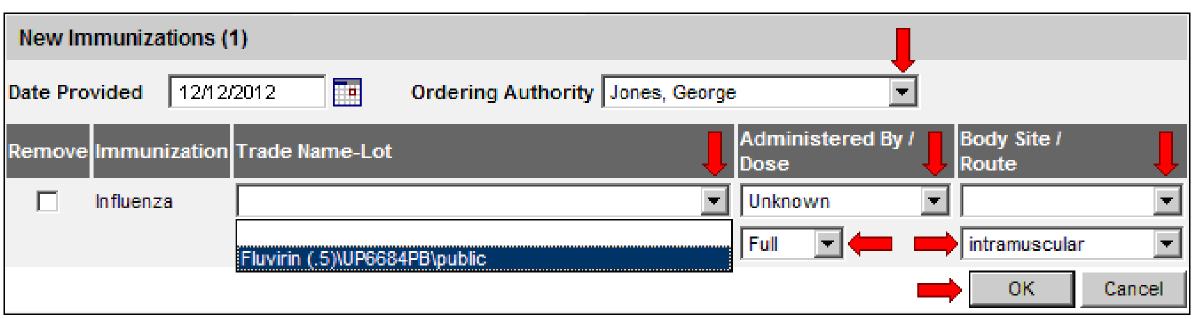
b. Once you have selected the appropriate vaccines, click **ADD SELECTED**.



5. Fill in the appropriate organization site, administered by, eligibility, and date administered fields. Press the **OK** button.



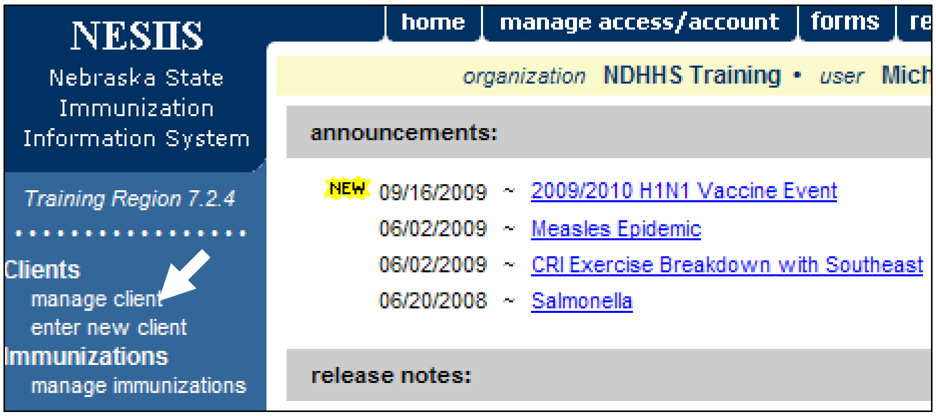
6. On the next screen, enter all known information about each immunization using the pick lists (trade name, lot number, eligibility, administered by, body site/route, etc).



7. Press **OK**.

Entering "HISTORICAL" Immunizations

1. Click on **Manage Client**

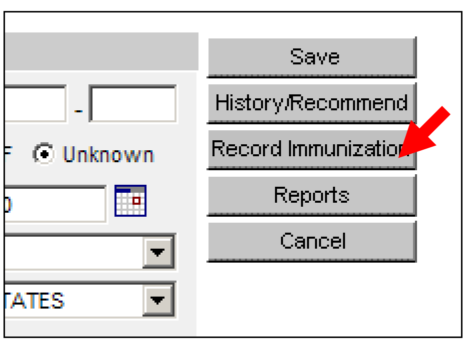


2. Search for Client by entering last name and first name and hit **Find**

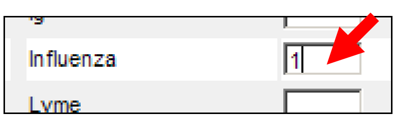
    a. If client does not exist then click on **Enter New Client** and fill in at least the Blue Required Fields.
    (Mothers Maiden Name and Mothers First Name fields can be left blank if they are unknown)
    If you have address information please enter it by clicking on the **Responsible Persons** Tab

Hit **SAVE** when you are finished.

Click on **Record Immunization**



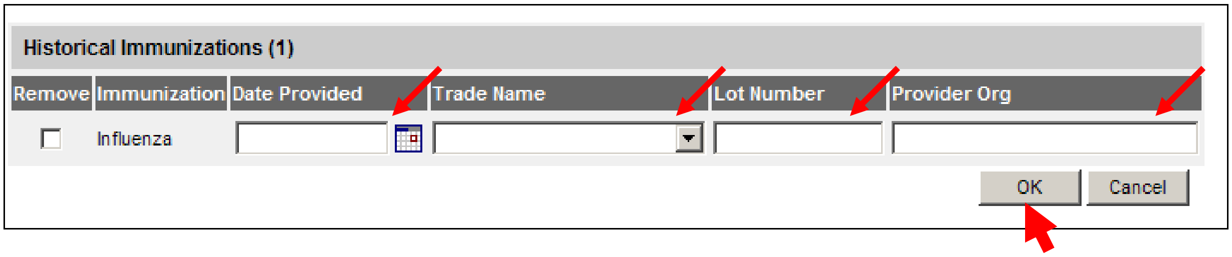
Find the appropriate vaccine type and enter in the number of doses you will be recording in the **Hist #** Box behind that vaccine.



3. Once done entering all the doses to be recorded press the **OK** button.

4. Enter the Date the shot was provided. Select the trade name, enter the lot number, and provider organization if you know it.

   Press **OK**

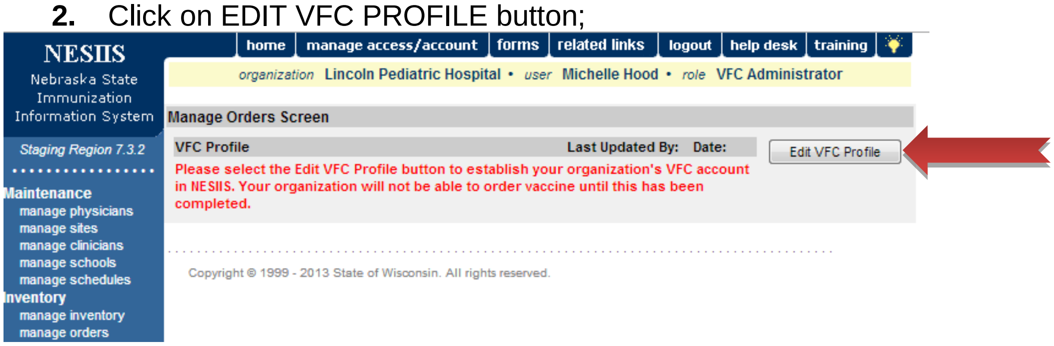


Manage Orders-Edit VFC Profile

Note: Please review your VFC profile each time before placing any order.

1. Click on MANAGE VACCINE ORDERS link.

2. Click on EDIT VFC PROFILE button;

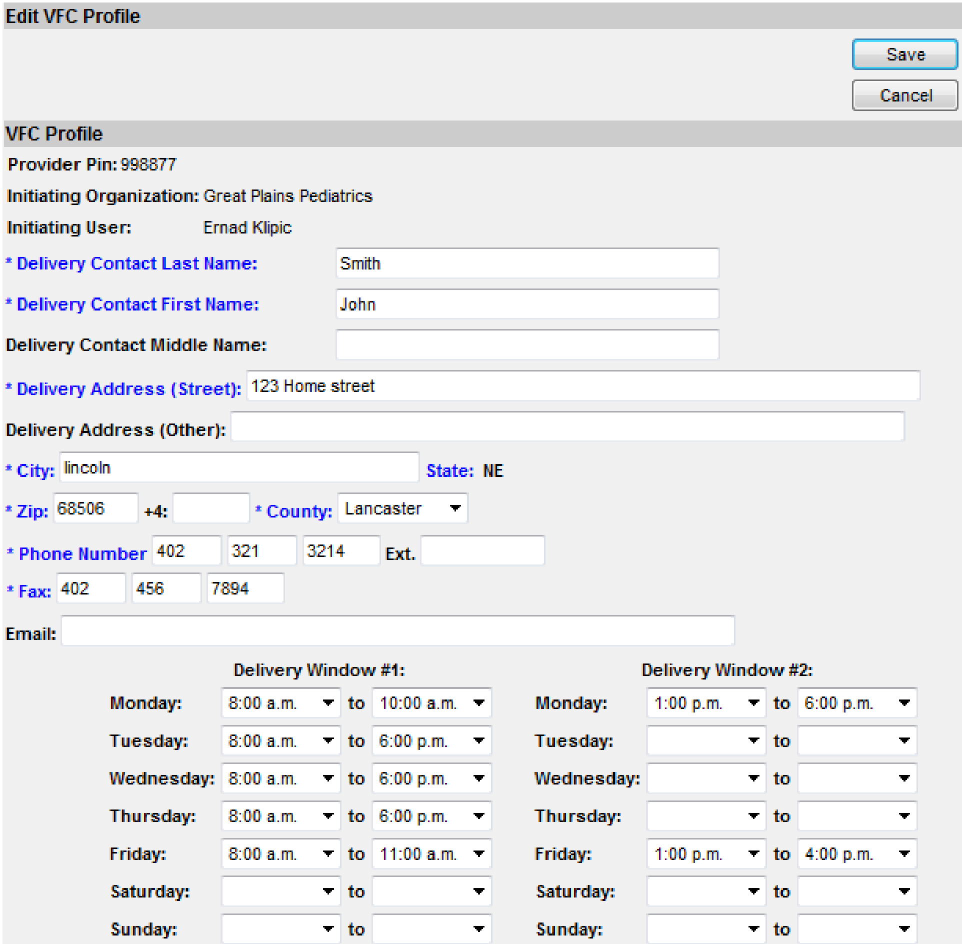


3. On the next screen, please review the following (**note:** all the fields shown in **blue** are required):

- **Delivery Contact Last Name**
- **Delivery Contact First Name**
- **Delivery Address(Street),City, Zip, County,**
- **Phone number**
- **Fax**
- **Delivery Window#1** (If day of week is not entered, it is assumed it the organization is closed on that date.)
- **Delivery Window #2** :(If Delivery Window 2 is left blank, it’s assumed that there was no break in Delivery Window 1 entry)

NOTE:

1. Delivery times can be split between Window #1 and Window #2 (example: 8:00 am to 12:00pm 1:00pm – 5:00 pm)
2. If times are not entered for any given day, it will be assumed that your organization is closed or not accepting shipments on that day.



Edit VFC Profile

Save

Cancel

VFC Profile

Provider Pin: 998877

Initiating Organization: Great Plains Pediatrics

Initiating User: Ernad Klipic

* Delivery Contact Last Name: Smith

* Delivery Contact First Name: John

Delivery Contact Middle Name:

* Delivery Address (Street): 123 Home street

Delivery Address (Other):

* City: lincoln State: NE

* Zip: 68506 +4: * County: Lancaster

* Phone Number 402 321 3214 Ext.

* Fax: 402 456 7894

Email:

	Delivery Window #1:				Delivery Window #2:		
Monday:	8:00 a.m.	to	10:00 a.m.	Monday:	1:00 p.m.	to	6:00 p.m.
Tuesday:	8:00 a.m.	to	6:00 p.m.	Tuesday:		to	
Wednesday:	8:00 a.m.	to	6:00 p.m.	Wednesday:		to	
Thursday:	8:00 a.m.	to	6:00 p.m.	Thursday:		to	
Friday:	8:00 a.m.	to	11:00 a.m.	Friday:	1:00 p.m.	to	4:00 p.m.
Saturday:		to		Saturday:		to	
Sunday:		to		Sunday:		to	

If anything needs to be updated or changed, please do that now.

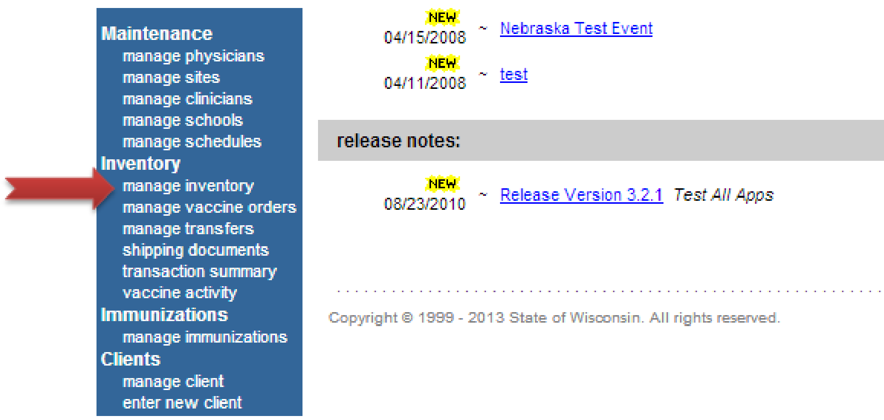
1. Click SAVE when finished.

If you any questions related to this matter, please call 800-798-1696 or 402-471-6423

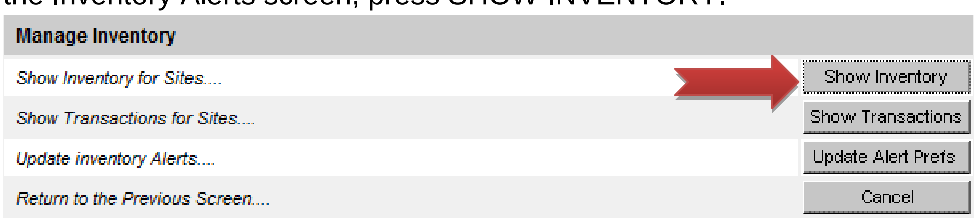
Manage Orders- Manage Inventory

<u>NOTE</u>: Per federal requirements, VFC provider must submit their inventory on Hand before placing each vaccine order.

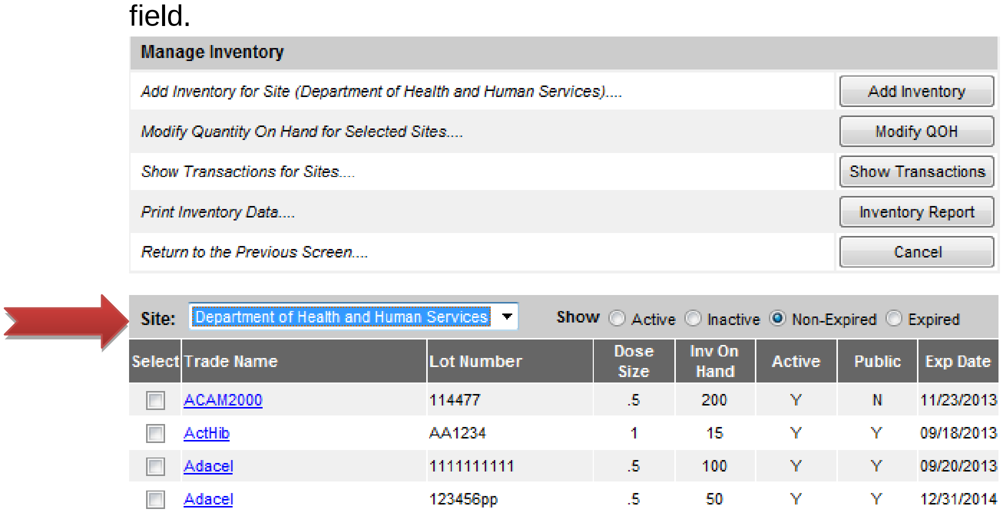
1. Click on MANAGE INVENTORY:



2. At the Inventory Alerts screen, press SHOW INVENTORY.

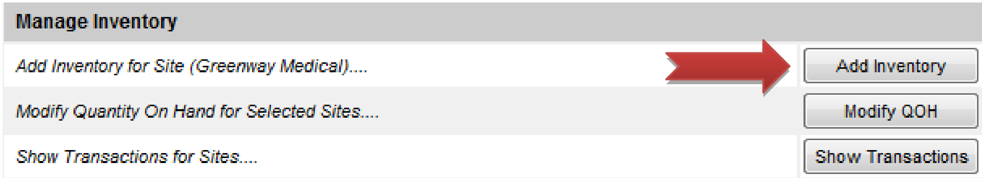


3. At the next screen, please verify the name of your organization is showing up in the Site field.

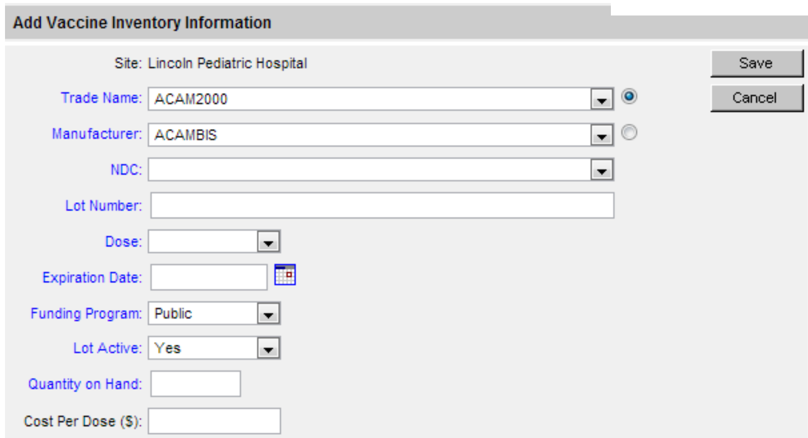


Select	Trade Name	Lot Number	Dose Size	Inv On Hand	Active	Public	Exp Date
	ACAM2000	114477	.5	200	Y	N	11/23/2013
	ActHib	AA1234	1	15	Y	Y	09/18/2013
	Adacel	1111111111	.5	100	Y	Y	09/20/2013
	Adacel	123456pp	.5	50	Y	Y	12/31/2014

4. Click on ADD INVENTORY.



5. At the Add Vaccine Inventory Information screen, do the foll

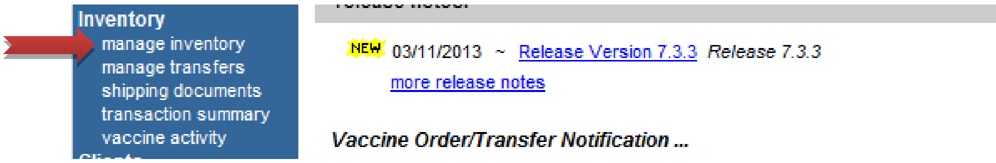


- Choose the vaccine's trade name from the pick list provided.
- With the Trade Name drop down selection made, all NDCs associated with selected Trade Name populate in a drop down list.
- If there is only one NDC for the Trade Name or Manufacturer selected, that NDC will be selected by default.
  The NDC drop down allows the user to select NDC based on the selected Trade Name and vaccine presentation. All of the NDCs associated with the trade name are included in the NDC drop down list, regardless of the orderable status.
- Enter the lot number of the vaccine in the Lot Number text box.
- Choose the dose from the Dose pick list; choose from .25, .5, etc.
- Enter the vaccine lot's expiration date. 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. If no day is specified on the vaccine, enter the last day of the month.
- Choose the source of funding (public or private) used for the purchase of the vaccine from the pick list.
- Choose "Yes" from the Lot Active pick list. When adding new inventory, the lot may only be entered as active. This controls whether the lot shows up on pick lists.
- Enter the number of vaccine doses received in the Quantity on Hand text box.
- Enter the cost per dose of the vaccine, if desired, in the Cost Per Dose field.

6. Press SAVE.
7. If the new vaccine was saved successfully, the message “Inventory was inserted successfully” will appear at the bottom of the screen.
8. To add additional vaccines, press ADD INVENTORY.
9. To return to the Show Inventory screen, press CANCEL.

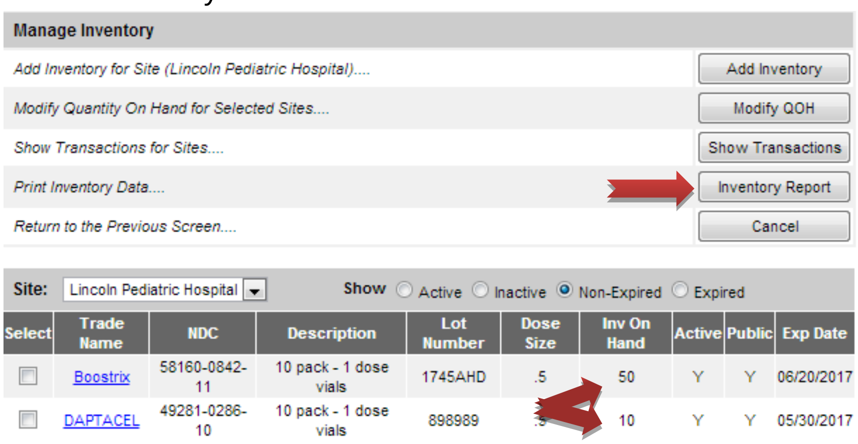
Modify Inventory

1. Click on MANAGE INVENTORY.



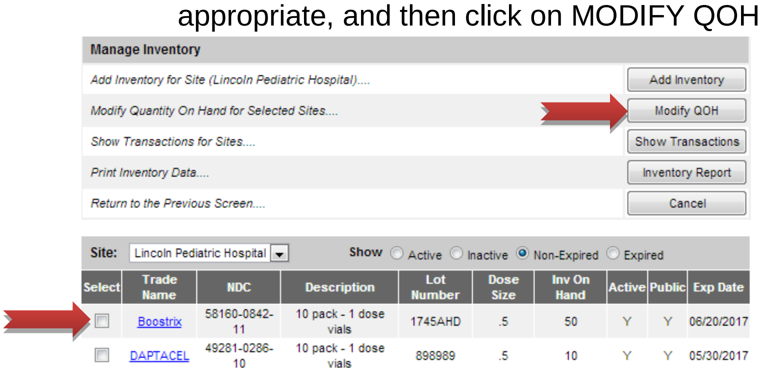
2. Click on SHOW INVENTORY.

3. Please verify the inventory on hand quantities match what you currently have in inventory.



NOTE: To help you to do this you can print the INVENTORY REPORT, which will display all your inventoried items, and manually record quantities on it.

4. If they do not match, please select one or more lots in order to modify your inventory as appropriate, and then click on MODIFY QOH button.

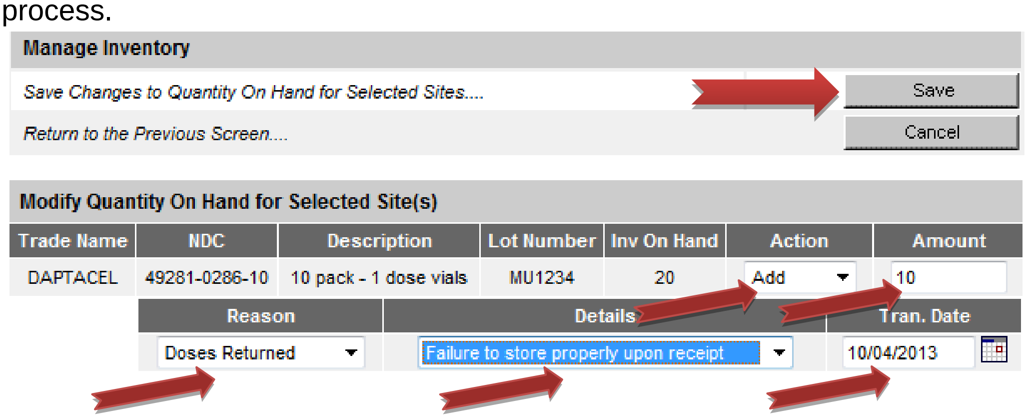


5. Under Action, choose whether you would like to add to or subtract from the inventory on hand. Under Amount, enter the quantity of inventory to be added or subtracted. Choose an explanation for changing the quantity of the vaccine lot by selecting from the Reason dropdown list.

   Reasons for adding or subtracting inventory:
   - **Doses Administered** – Allows facilities to subtract doses administered from their inventory.
   - **Doses Received** – Allows facilities to add doses received from vaccine shipments.
   - **Doses Transferred** – Allows facilities to either add or subtract doses based on vaccine transfers coming into the facility or vaccine transfers being sent outbound from the facility.
   - **Doses Wasted** – Allows facilities to subtract doses when wastage occurs.
     - If Doses Wasted is selected as Reason Code, users must select from the Details drop down field before the entry can be successfully saved.
   - **Doses Returned** – Allows facilities to subtract doses when vaccine has been returned to the CDC or State.
     - If Doses Returned is selected as Reason Code, users must select from the Details drop down field before the entry can be successfully saved.
   - **Error Correction** – Allows facilities to add or subtract doses when a data entry error has occurred.
     - Error Correction option is only available for Private vaccine.

Depending on your selection, you will need to enter more details by selecting from the Details dropdown list.

6. Press Save. After the changes have been saved, you may begin the create order process.

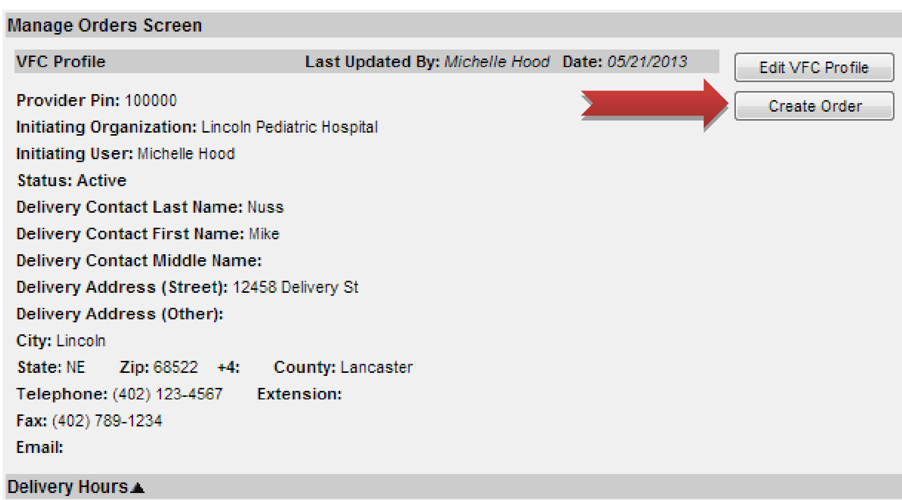


Create/Modify/Cancel Vaccine Order

Create vaccine orders

1. Click on MANAGE VACCINE ORDERS.

2. Click on CREATE ORDER.



Please verify the inventory on hand quantities match what you currently have in inventory. If they do not match, please go to the Manage Inventory screen to modify your inventory as appropriate. After the changes have been saved, you may begin the create order process.

Inventory on Hand

Please verify the inventory on hand quantities listed below match what you currently have in inventory. If they do not match, please go to the Manage Inventory screen to modify your inventory as app
After the changes have been saved, you may begin the create order process.

Order Vaccine | Manage Inventory | Cancel

Grantee Code: NEA **Provider Pin:** 100000 **Inventory Date:** 06/20/2013

Quantity	Trade Name	Description	NDC	Ordering Intention	Lot Number	Exp. Date
50	Boostrix	10 pack - 1 dose vials	58160-0842-11	Adult	1745AHD	06/20/2017
10	DAPTACEL	10 pack - 1 dose vials	49281-0286-10	Pediatric	898989	05/30/2017

3. Click on Order Vaccine.

Inventory on Hand

Please verify the inventory on hand quantities listed below match what you currently have in inventory. If they do not match, please go to the Manage Inventory screen to modify your inventory as appropriate.
After the changes have been saved, you may begin the create order process.

Order Vaccine | Manage Inventory | Cancel

Grantee Code: NEA **Provider Pin:** 100000 **Inventory Date:** 06/20/2013

Quantity	Trade Name	Description	NDC	Ordering Intention	Lot Number	Exp. Date
50	Boostrix	10 pack - 1 dose vials	58160-0842-11	Adult	1745AHD	06/20/2017
10	DAPTACEL	10 pack - 1 dose vials	49281-0286-10	Pediatric	898989	05/30/2017

4. Enter the number of DOSES you wish to order at this time for each NDC listed below. The quantity entered must be an exact multiple of the doses per package. Items highlighted in **blue** will allow single dose ordering. Once complete, select the Submit Order button.

Create Order

Please enter the number of **DOSES** you wish to order at this time for each NDC listed below quantity entered must be an exact multiple of the doses per package. Items highlighted in **blue** will allow single dose ordering.

Submit Order | Cancel

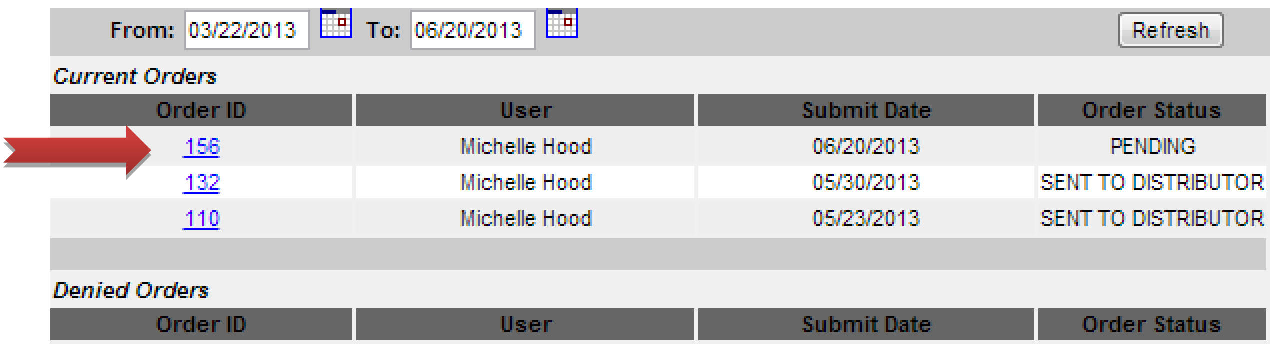
Grantee Code: NEA **Provider Pin:** 100000 **Order Date:** 06/20/2013

Quantity (in doses)	Antigen	Trade Name	Description	NDC	Ordering Intention
	DTaP	DAPTACEL	allow single dose order test	11111-2222-55	Pediatric
	DTaP	DAPTACEL	10 pack - 1 dose vials	49281-0286-10	Pediatric
	DTaP	INFANRIX	10 pack - 1 dose T-L syringes. No Needle	58160-0810-52	Pediatric
	DTaP	INFANRIX	10 pack - 1 dose vials	58160-0810-11	Pediatric
	DTaP-HepB-IPV	PEDIARIX	10 pack - 1 dose T-L syringes. No Needle	58160-0811-52	Pediatric
	DTaP-IPV	KINRIX	10 pack - 1 dose T-L syringes	58160-0812-52	Pediatric

Modify Order

Note: <u>VFC Administrators will have the ability to modify their orders IF they have not yet been approved or rejected by the Nebraska Immunization Department. VFC Administrators can also cancel an entire vaccine order in NESIIS .</u> All orders in a Pending status on the Manage Orders screen fit these criteria. If an order has been accepted or rejected by the Nebraska Immunization Department, the status on the Manage Orders screen will display a message other than Pending. Users can select the Order ID hyperlink to navigate to the View Order screen. The order details will be provided however; you will not have the ability to change vaccine order quantities or cancel the order.

To modify your order, click on MANAGE VACCINE ORDER, and then click on the Order ID hyperlink.



From: 03/22/2013 To: 06/20/2013 Refresh

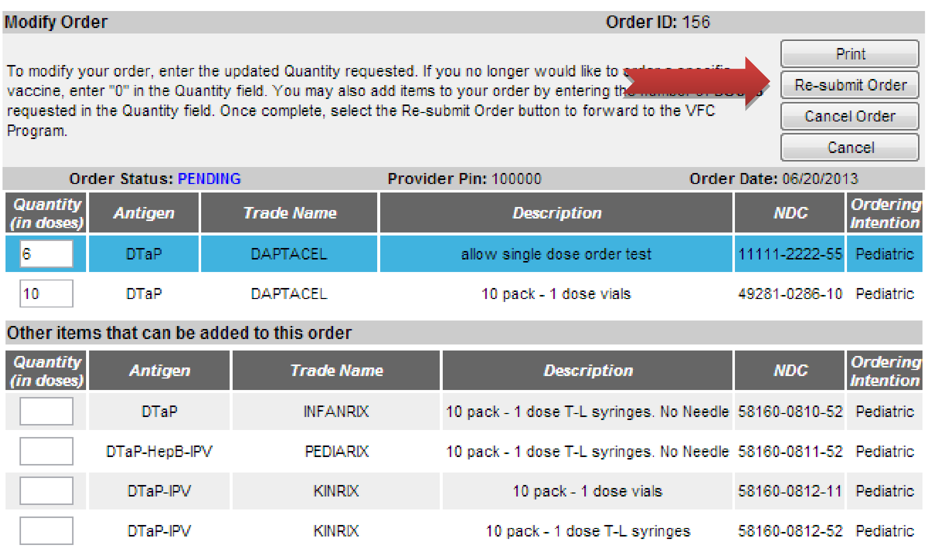
Current Orders

Order ID	User	Submit Date	Order Status
156	Michelle Hood	06/20/2013	PENDING
132	Michelle Hood	05/30/2013	SENT TO DISTRIBUTOR
110	Michelle Hood	05/23/2013	SENT TO DISTRIBUTOR

Denied Orders

Order ID	User	Submit Date	Order Status

To modify your order, enter the correct number of DOSES you would like to order in the Quantity field. If you no longer want to order a specific vaccine, enter "0" in the Quantity field. Once complete, select the Re-submit Order button to forward your order to the VFC Program.



Modify Order **Order ID:** 156

To modify your order, enter the updated Quantity requested. If you no longer would like to [illegible] vaccine, enter "0" in the Quantity field. You may also add items to your order by entering th[illegible] requested in the Quantity field. Once complete, select the Re-submit Order button to forward to the VFC Program.

Print | Re-submit Order | Cancel Order | Cancel

Order Status: PENDING **Provider Pin:** 100000 **Order Date:** 06/20/2013

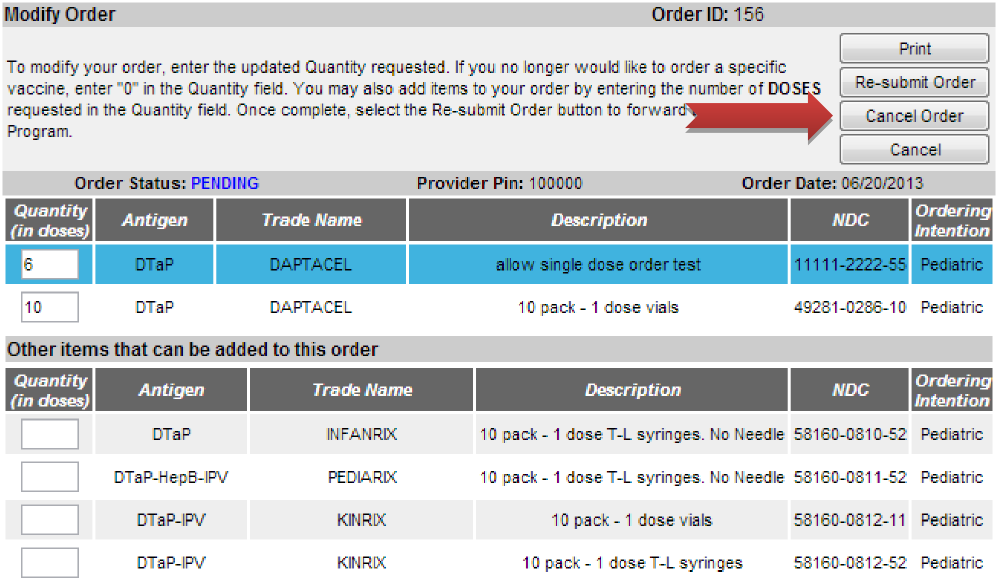
Quantity (in doses)	Antigen	Trade Name	Description	NDC	Ordering Intention
6	DTaP	DAPTACEL	allow single dose order test	11111-2222-55	Pediatric
10	DTaP	DAPTACEL	10 pack - 1 dose vials	49281-0286-10	Pediatric

Other items that can be added to this order

Quantity (in doses)	Antigen	Trade Name	Description	NDC	Ordering Intention
	DTaP	INFANRIX	10 pack - 1 dose T-L syringes. No Needle	58160-0810-52	Pediatric
	DTaP-HepB-IPV	PEDIARIX	10 pack - 1 dose T-L syringes. No Needle	58160-0811-52	Pediatric
	DTaP-IPV	KINRIX	10 pack - 1 dose vials	58160-0812-11	Pediatric
	DTaP-IPV	KINRIX	10 pack - 1 dose T-L syringes	58160-0812-52	Pediatric

<u>Cancel Order</u>

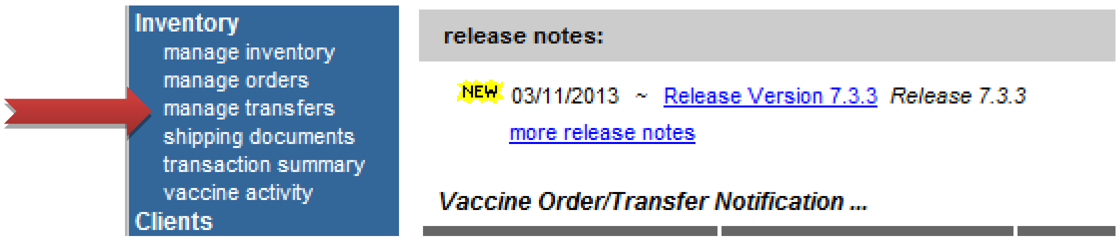
Selecting this button will cancel the entire vaccine order. To cancel your order, click on manage vaccine order, and then click on the Order ID hyperlink. On the next screen, click on CANCEK ORDER button. The order status will display Cancelled on the Manage Orders Screen.


Modify Order
Order ID: 156
To modify your order, enter the updated Quantity requested. If you no longer would like to order a specific vaccine, enter "0" in the Quantity field. You may also add items to your order by entering the number of DOSES requested in the Quantity field. Once complete, select the Re-submit Order button to forward
Program.
Print
Re-submit Order
Cancel Order
Cancel
Order Status: PENDING
Provider Pin: 100000
Order Date: 06/20/2013
Quantity (in doses)
Antigen
Trade Name
Description
NDC
Ordering Intention
6
DTaP
DAPTACEL
allow single dose order test
11111-2222-55
Pediatric
10
DTaP
DAPTACEL
10 pack - 1 dose vials
49281-0286-10
Pediatric
Other items that can be added to this order
Quantity (in doses)
Antigen
Trade Name
Description
NDC
Ordering Intention
DTaP
INFANRIX
10 pack - 1 dose T-L syringes. No Needle
58160-0810-52
Pediatric
DTaP-HepB-IPV
PEDIARIX
10 pack - 1 dose T-L syringes. No Needle
58160-0811-52
Pediatric
DTaP-IPV
KINRIX
10 pack - 1 dose vials
58160-0812-11
Pediatric
DTaP-IPV
KINRIX
10 pack - 1 dose T-L syringes
58160-0812-52
Pediatric

Accepting Shipments

Orders and transfers made through NESIIS and received by the provider organization must be accepted, rejected, or partially accepted so that NESIIS can post and track inventory properly. To accept or reject an order or transfer in NESIIS, follow these steps:

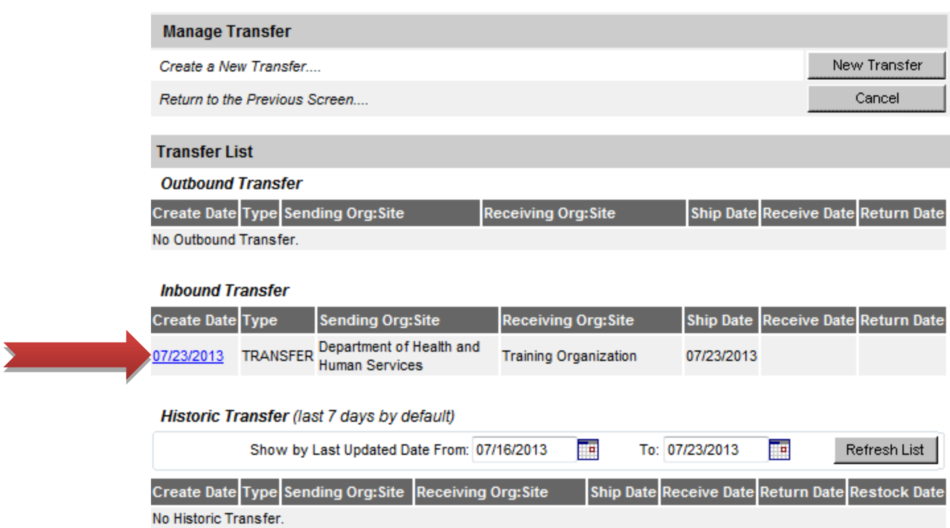
1. Click on MANAGE TRANSFERS under the Inventory section of the menu panel.



2. The Manage Transfer screen categorizes transfers as follows:

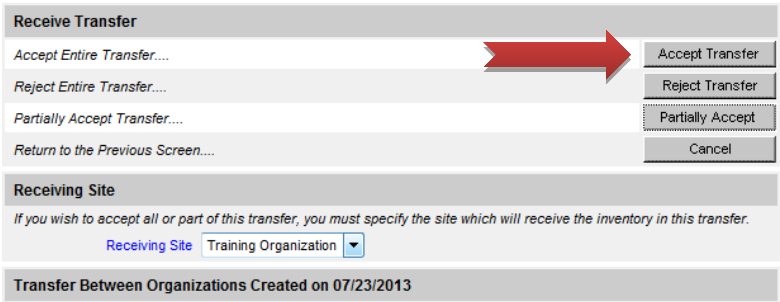
- <u>Outbound Transfer</u>: Outbound transfers are outgoing transfers for inventory created by your organization being sent to another internal site or external organization. Outbound transfers can also include returns on an order or transfer in the event something was wrong with the inventory received.
- <u>Inbound Transfer:</u> Inbound transfers are incoming transfers for inventory sent either by your organization internally or from an external organization or orders filled by an order filling organization. (Transfers are created every time an order is filled, whether full or partial.)
- <u>Historic Transfer:</u> Displays completed transfers.

3. To proceed to the Receive Transfers screen (on which you may accept or reject orders and transfers), go to **INBOUND TRANSFER** section and click on the date underlined in blue in the Create Date column which corresponds with the transfer you wish to receive.



4. At the Receive Transfer screen, you may accept the entire transfer, Reject the entire transfer. or Partially Accept some of the transfer, while rejecting the remainder.

- **Accept Transfer:** To accept the entire transfer, press ACCEPT TRANSFER, Press OK to accept the transfer and add all transfer items into inventory.



NOTE: Please make sure the correct site is selected to receive the inventory in this transfer.

Transfer Inventory

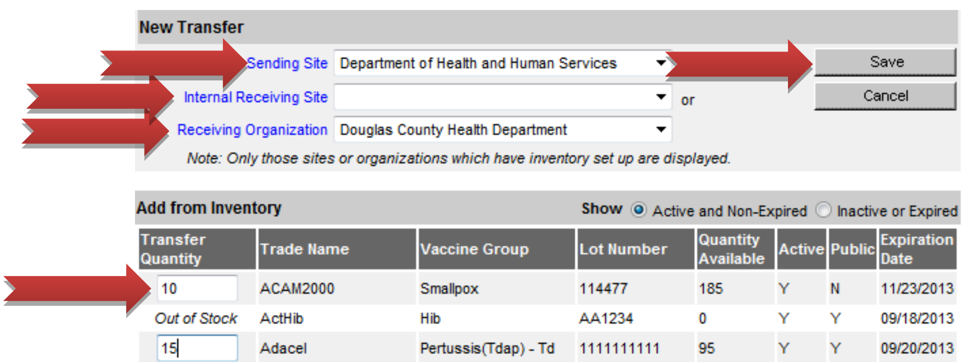
NESIIS allows you to transfer vaccines between sites within your organization or between two organizations. To create a transfer, follow these steps:

1. Click on MANAGE TRANSFERS under the Inventory section of the menu panel.

2. On the next screen, click on NEW TRANSFER.

3. Enter the following information:

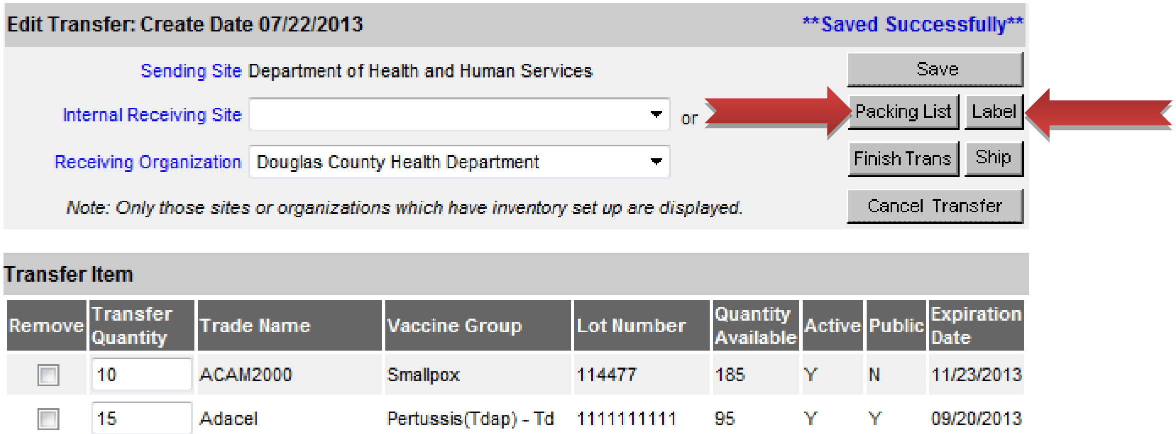
- The sending site from which you will be taking the vaccine.
- The internal receiving site or the external receiving organization to which you are transferring the vaccine.
- Choose between active/non-expired or inactive/expired vaccines by clicking the appropriate radio button ( ).
- The number of doses in the Transfer Quantity field for each of the trade names being transferred.



4. Once you're done, click SAVE button.

Once you have finished your transfer, please follow these steps to proceed with shipping the transfer.

5. You must first generate a "Packing List" for the transfer before it is shipped out. To generate a packing list click on the "Packing List button". To generate a label click on the "Label "button. Once this is complete you will be allowed to ship out the transfer.



Edit Transfer: Create Date 07/22/2013 **Saved Successfully**

Sending Site Department of Health and Human Services

Internal Receiving Site or

Receiving Organization Douglas County Health Department

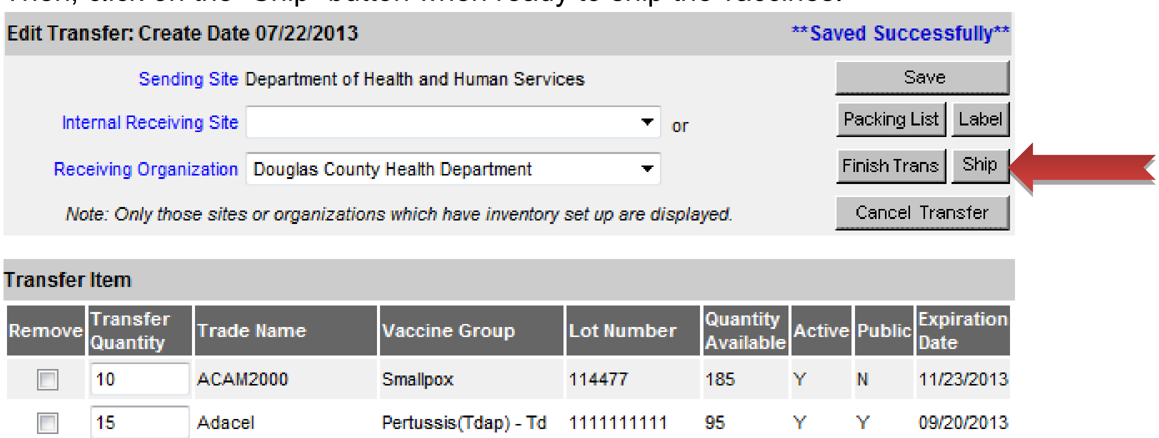
Note: Only those sites or organizations which have inventory set up are displayed.

Save | Packing List | Label | Finish Trans | Ship | Cancel Transfer

Transfer Item

Remove	Transfer Quantity	Trade Name	Vaccine Group	Lot Number	Quantity Available	Active	Public	Expiration Date
☐	10	ACAM2000	Smallpox	114477	185	Y	N	11/23/2013
☐	15	Adacel	Pertussis(Tdap) - Td	1111111111	95	Y	Y	09/20/2013

6. Then, click on the “Ship” button when ready to ship the vaccines.



Edit Transfer: Create Date 07/22/2013 **Saved Successfully**

Sending Site Department of Health and Human Services

Internal Receiving Site or

Receiving Organization Douglas County Health Department

Note: Only those sites or organizations which have inventory set up are displayed.

Save | Packing List | Label | Finish Trans | Ship | Cancel Transfer

Transfer Item

Remove	Transfer Quantity	Trade Name	Vaccine Group	Lot Number	Quantity Available	Active	Public	Expiration Date
☐	10	ACAM2000	Smallpox	114477	185	Y	N	11/23/2013
☐	15	Adacel	Pertussis(Tdap) - Td	1111111111	95	Y	Y	09/20/2013

Note: If you have not generated a packing list or label for the transfer the following message will appear: “A packing list or label must be printed before shipping”

7. On the next screen, either use today’s date or enter an alternate date in MMDDYYYY format. Press SHIP. The transfer will then be moved to the Outbound Transfer list, where it will remain until it is accepted by the receiving site/organization.

Ship Transfer

Enter Ship Date 07/22/2013

Ship | Cancel

Transfer Between Organizations Created on 07/22/2013

Sending Entity		Receiving Entity	
Organization	Department of Health and Human Services	*Organization*	Douglas County Health Department
Site	Department of Health and Human Services	*Site*	Douglas County Health Department
Address	301 Centennial Mall South LINCOLN, NE 68509	*Address*	1819 Farnam Street, Omaha-Douglas Civic Center, Rm. 401 OMAHA, NE 68183
Contact	Help Desk	*Contact*	Shavonna Lausterer
Phone #	(888) 433-2510	*Phone #*	(402) 444-7213

To complete an internal transfer without printing shipping documents, press FINISH TRANS. The ship and receive dates will be set to the current date. The inventory affected by the transfer will be directly added to the internal receiving site’s inventory and deducted from the sending site’s inventory.

16 Glossary

ACIP
Advisory Committee on Immunization Practices. Along with the Centers for Diseases Control and Prevention (CDC), provides written recommendations on the administration of vaccines to adults and children in the United States. These recommendations include a schedule of dosage, contraindication, and periodicity information for each vaccine. This “harmonized schedule” is the default schedule within NESIIS.

Bookmark
A browser tool used for accessing Web sites quickly. After setting a bookmark at a Web page, you may return to that page simply by clicking on its bookmark, rather than entering the entire Web address. Also known as a favorite.

Browser
A software program you use to access the Internet. The two most common browsers are Netscape® and Internet Explorer®.

CASA
Clinic Assessment Software Application. A tool developed by the Centers for Disease Control and Prevention (CDC) used for assessing immunization levels of clients for an immunization provider.

CDC
Centers for Disease Control and Prevention. The CDC is the lead federal agency for protecting the health and safety of people, providing information to enhance health decisions.

Census tract
A small subdivision of a county containing 3,000-10,000 people. A census tract has boundaries designed and maintained by the U.S. Census.

Client
Anyone who has an immunization recorded in NESIIS by a provider organization.

Clinician
A person who administers an immunization; for example, a nurse.

Client Primary Address
The single address that identifies where a client lives.

Data exchange
A feature that allows you to automatically exchange immunization batch files with NESIIS.

De-duplication
An automatic process that displays potential client matches to help ensure that client records are not duplicated in NESIIS.

Desktop
The default screen on your computer that displays when no programs are open. The desktop contains shortcut icons that allow the user to open the represented programs and files from the desktop screen.

Favorite
See Bookmark.

GIS
Geographic Information Systems. The GIS online viewer allows geographic display of immunization data, patterns, and trends.

Grace period
The default period of time prior to and following an immunization. This time period is used to validate a client’s immunization history; it does not affect immunization recommendations.

HEDIS
Health Plan Employer Data and Information Set. A performance measurement/assessment tool used to ensure quality care from managed care plans.

HL7
Health Level 7. A method of categorizing data so that it is uniform across all health reporting systems. Allows for easier data transfer among different systems.

Home page
The opening page of a Web site. NESIIS's home page is the page that displays after you successfully log in. It contains announcements, release notes, resources, and the menu.

Hyperlink
A word or group of words that is underlined and appears in a colored font, usually blue, in NESIIS. When you click on the underlined text, the Web site, page, or document that is described will be displayed. Also known as a link.

Immunization system
Confidential, computerized information system containing client demographics and immunization histories. Systems enable public and private health care providers to maintain consolidated immunization records.

Login
The first screen (aside from any security/ certificate warnings) that appears after you access NESIIS's Web address. The Login screen requires you to enter your organization's name, your username, and your password to access NESIIS.

Logout
Button on NESIIS's menu bar that allows you to exit NESIIS and return to the Login screen. You may logout from any screen in NESIIS.

Lot number
The unique, identifying number given to each vaccine by the manufacturer.

Menu bar
NESIIS's menu bar is dark blue and appears at the top of every screen within the system. The menu bar has several menu options: home, change password, logout, and help (light bulb/). The menu bar on your Internet browser, on the other hand, is located near the top of your computer screen and contains words with drop-down lists such as File, Edit, View, Tools, etc.

Menu panel
NESIIS's menu panel is a medium blue color and appears to the left of every screen within the system. The menu panel lists all of the NESIIS functions available to the user.

NESIIS
Nebraska Immunization Information System. A population-based Web application containing consolidated demographic and immunization history information.

Ordering authority
A person with the capability of ordering an immunization for a client; a person with ordering authority is generally the client's pediatrician or primary care provider or, within public health organizations, the medical director.

PDF
Portable document file. A file format that allows you to view and print a document online in its original format.

Provider Address
The address of the provider organization.

Radio button ()
An input circle that, when clicked, fills with a black dot to indicate a selection. For example, on the Manage Clients screen of NESIIS, the client's gender is indicated by selecting the radio button beside M, F, or N/A.

Recall Notice
A card or letter that informs a responsible person or client of immunizations that are overdue.

Regional Percentage Item
An item for which a client may or may not meet given criteria regarding immunizations or address status. Users may use the Ad Hoc List Results screen to map percentages of clients meeting the chosen percentage item and to view shading on the map at the county and census tract levels.

Release
A new version of an application, which usually includes enhancements and software fixes. Each release of an application is indicated with a number; for example, NESIIS release version 3.0.

Reminder notice
A card or letter that informs a responsible person or client of immunizations that are due in the future.

Responsible person
A parent, relative, or guardian who is associated with the client and may act as a contact. A client may also act as the responsible person for him- or herself.

Responsible person address
An address associated with one of the client's responsible persons.

Sequence
Identifies which dose is being referred to within a vaccine series. For example, a number "2"sequence indicates the second dose of the series.

Series
The compilation of doses for one vaccine that provides immunity for a certain disease or diseases. For example, the recommended series for the DTP/aP vaccine contains five doses.

Shortcut
An icon located on your computer's desktop which, when double-clicked, will open the program displayed by the icon.

Toolbar
Located near the top of your computer screen, the toolbar on your Internet browser contains several buttons, such as Back, Forward, Stop, Refresh, and Home.

Tracking schedule
A schedule of recommended vaccines, their dosage and periodicity information. The tracking schedule is used to validate a client's immunization history and makes recommendations for future vaccinations based on that history.

User roles
NESIIS users are categorized into hierarchical roles that determine their level of access to the functions of NESIIS. The four provider roles are Administrator, Inventory Control, Typical User, and Reports-Only.

Users
Individuals who access NESIIS in some way, whether it be for printing reports, entering immunization information, tracking inventory, or entering organization-specific maintenance information.

Vaccine group
A category that describes one type of vaccination. For example, the vaccine trade names Engerix-B, Comvax, and Recombivax all fall under the Hepatitis B vaccine group.

Vaccine trade name
A unique, identifying name for a vaccine series given by the manufacturer. For example, Engerix-B is the trade name for a Hepatitis B vaccine manufactured by GlaxoSmithKline.