Oklahoma State Immunization Information System
OSIIS Web User Manual

[UPDATED August 27, 2018]
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Logging into OSIIS

To log into OSIIS, you must be a registered OSIIS user and obtain a username and password. See your site’s OSIIS System Administrator or contact the OSIIS Help Desk at (405)271-7200 for assistance.

For more information on logging into OSIIS, training opportunities and other materials related to OSIIS, please visit the Oklahoma State Department of Health Website by clicking here.

Use the link provided below to connect directly to OSIIS:

https://osiis.health.ok.gov/

**OSIIS requires Internet Explorer version 11 or higher to work optimally. Check the version on your computer and update here.

At the OSIIS Log In screen, the Username field is highlighted in blue.

![OSIIS Login Screen](Image)
1. Enter your **Username** in the indicated field. Usernames *are not case sensitive*.

2. Press the keyboard `<Tab>` key or, click within the **Password** field to move the cursor.

3. Enter your **Password** *(case sensitive)*.
   a. First time OSIIS users will use the **default password** obtained through OSIIS System Administration to log in.

*Note: You can easily see or verify your password by clicking on the **View** icon, located to the right of the entry.*
4. Click the **Log In** button to continue. Please DO NOT use ‘enter’ key, rather, click on the **Log In** button.

5. If the **Username** or **password** are entered incorrectly or not found, an error message is shown:

   ![Error Logging In]

   a. To clear the error, click the **OK** button and begin the log in sequence again. Ensure the username and password is correct before attempting to log in again.

   b. When correctly entering a valid username, a maximum of three (3) attempts are given for the user to correctly enter the password. Should this limit be exceeded, the user will be locked out of the OSIIS system as a security precaution. The user will receive on-screen notification of their temporarily locked out status.
d. A system initiated waiting period of twenty (20) minutes is now in effect. Users should not attempt to log into OSIIS until this time period has elapsed.

e. Click the OK button to access the OSIIS Log In screen.

6. When successfully logged into OSIIS with an unexpired user-defined password, users are directed to the OSIIS Homepage and the login sequence is complete (Figure 5).

Once a user is successfully logged into the system using the default password, it is required that they change the default password setting to a user-defined password. Users will be immediately directed to the Change Password screen in OSIIS (refer to Figure 6).
Change Password

Circumstances in which a user will need to change their password include:

- Forgotten password (Password Reset)
- Change default password
- Expired password

OSIIS user guidelines require passwords to be changed every ninety (90) days. Users logging into OSIIS with a default password or expired password will be immediately directed to the Change Password screen to update their password and complete the login sequence. This also can be accomplished at any time using the Change Password feature.

To access the Change Password feature:

1. Click to open the User tab. Scroll down to highlight Change Password and click. The Change Password screen is now accessible (Figure 6)
To continue logging into OSIIS using a **default password** or an **expired password**:

2. At the **Change OSIIS Password** screen the **Username** field will be automatically populated with the previously entered log in information. Click the **password** field to highlight. Enter your current OSIIS password (**default password** or **expired password**)

![Figure 6- Change Password Screen](image)

- Any entry can be verified by clicking the **View** icon

![View Icon](image)

- Press the keyboard **<Tab>** key, or click in the **New Password** field to continue. The screen will darken momentarily while the current password is being verified.
*Note: Pressing the <Enter> key has no effect on cursor movement*

- If the current password is entered incorrectly, an error message is displayed

![Invalid Password](image)

- Click the OK button. Click the Password field to highlight and re-enter the password

3. After the current password has been verified, enter the New Password. Your new password must contain:
   - At least eight (8) characters
   - At least one lower case letter
   - At least one capital letter
   - At least one number
   - At least one special character
4. Verify the new password for compliance to password requirements and for accuracy using the View icon.  
   - Press the <Tab> key, or click the Confirm New Password field to continue.

5. Type the new password into the Confirm New Password field. Verify accuracy using the View icon if needed (Figure 10).

5. Click the Change Password button.

6. If any of the OSIIS password criteria has not been met, or if the passwords do not match, an error message is displayed, indicating what should be corrected. Click OK to continue.
7. A password may be re-used after a 120-day period. If a user attempts to recycle a password prior to this timeframe, an error message is displayed:

a. Click the **OK** button to continue. Enter a **New Password** (Step 3).
8. Once completed, users are notified of a successful password change. Click **OK** to continue (Figure 14).

![Figure 14-Password Changed Message](image)

The user will be directed to the **OSIIS Log In** screen (Figure 1) and may now log into OSIIS with their **Username** and the newly updated **Password** (Steps 1 through 5).

The OSIIS system will also update your current password expiration date to 90 days from the current date.

Once successfully logged in, users can use the **OSIIS Homepage** to accurately manage Oklahoma’s immunization resources and patients quickly and efficiently (Figure 5)!
Forgotten Password

If a user forgets their OSIIS password, they can reset their password using the **Forgot Password?** Hyperlink located on the OSIIS login screen.

To reset a password from the OSIIS **Log In** screen:

1. Click the **Forgot Password?** Hyperlink to access the **Reset Password** window (Figure 16).
2. Enter the **OSII Username** then click the **Send Reset Request** button
   a. If the username is entered incorrectly or not found, an error message is displayed advising the user a valid email address is not listed within their OSIIS user profile

   ![Error Message](image17)

   **Figure 17- Email Address Error**

   *Note: If the user selects the `<Enter>` key instead of Send Reset Request, an on-screen notification is sent indicating the login credentials are invalid

   ![Invalid Login Message](image18)

   **Figure 18- Invalid Login Message**

   Click the **OK** button to be directed back to the **Reset Password** screen. Click the **Send Reset Request** button

3. Successful entry of the username will result in a confirmation message being sent advising users to expect password reset instructions at their OSIIS-associated email address.

   ![Reset Email Sent Message](image19)

   **Figure 19- Reset Email Sent Message**
4. Click the **OK** button to return to the login screen
5. Users will receive an email containing the link and URL to reset their password.

![OSIISHELP Password Reset](image)

*Figure 20 – OSIISHELP Password Reset Email*

6. Open the email and select ‘**Click Here**’ to be directed to the **Reset OSIIS Password** screen

![OSIIS Reset Password Link](image)

*Note: The link within the **OSIIS Password Reset** email expires after 20 minutes. Prompt attention to this email is therefore strongly recommended. Should the user attempt to use an expired password reset link, they will receive an error message through a webpage message:

![Password Reset Expired Error](image)

*Figure 22- Password Reset Expired Error*

7. At the **Reset OSIIS Password** screen, the **Username** field will be auto populated.
8. Enter the **Email Address** associated with your OSIIS account. Press the keyboard `<Tab>` key or click the **New Password** field to continue.

9. Enter the **New Password**. Your new password must contain:
   - At least eight (8) characters
   - At least one lower case letter
   - At least one capital letter
   - At least one number
   - At least one special character

10. Verify the new password for rule adherence and accuracy using the **View** icon.

11. Press the `<Tab>` key, or click the **Confirm New Password** field to continue.
    
    a. Type the new password into the **Confirm New Password** field. Verify accuracy using the **View** icon if needed.
12. Click the **Change Password** button.

The new password(s) will be verified for matching and compliance purposes. If any of the OSIIS password and history criteria has not been met, an error message is displayed, indicating what should be corrected (refer to Figures 11 – 13). Users will need to click **OK** to continue and correct the indicated error(s).

Once the new password criteria have been satisfied, users are notified of a successful password change (refer to Figure 14). Click the **OK** button to continue. Users are then directed to the **OSIIS Log In** screen (refer to Figure 1) and may now log into OSIIS with their **Username** and the newly updated **Password** (Refer to Logging In section, steps 1-6).
OSIIS Homepage

The OSIIS Homepage serves as the system’s central reference point. It is the gateway to the Oklahoma State Immunization Information System (OSIIS), the newest immunization information and vaccine management system developed for the State of Oklahoma.

The OSIIS Homepage performs a variety of functions. Once successfully logged in to OSIIS, users are directed to the homepage. Here, the user’s default provider Site is identified. (Figure 26).

The Contact Information section of the homepage offers easy access to hyperlinks for the OSDH Website and Immunization Service Website along with the OSIIS Help physical address, email, phone number and fax information. Also, a link to the OSIIS FAQs (Frequently Asked Questions) is featured in Contact Info and can offer users an additional resource to questions concerning OSIIS (Figure 27).
**OSIIS Toolbar**

The OSIIS Toolbar allows the user to navigate through each function with clarity and ease. The user moves the cursor within the toolbar to highlight the drop-down list and then click the appropriate function.

![ OSIIS Homepage Toolbar ](image)

Modules displaying a down arrow feature a drop-down menu of selectable functions (Figure 29).

![ Patient Menu ](image)

**Minimized Toolbar**

Should the screen width of the OSIIS Homepage be reduced to less than 10 inches, the Toolbar appearance will change to a minimized format (Figure 30).
In the minimized format, the Toolbar functions are accessed by clicking the highlighted Toolbar icon (Figure 31).
Figure 31 - Minimized Homepage Toolbar
Table 1 lists each Icon/Feature and gives a brief description of its function on the OSIIS **Homepage**

<table>
<thead>
<tr>
<th>Icon /Feature</th>
<th>How to access</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Home</strong></td>
<td>Left click on tab.</td>
<td>Directs user to OSIIS Homepage. Features hyperlinks in <strong>Contact Info</strong> to the following: <strong>OSDH Website</strong>, <strong>Immunization Service Website</strong>, <strong>OSIIS Helpdesk email address</strong>, <strong>Frequently Asked Questions (FAQ)</strong> and <strong>Site Profile</strong>. The Site Profile link provides a convenient resource to view various site parameters including but not limited to site users, type, address, status and shipping frequency.</td>
</tr>
<tr>
<td><strong>Minimized Toolbar Icon</strong></td>
<td>Left click on Homepage Toolbar icon.</td>
<td>Viewable when <strong>OSIIS</strong> viewing pane is less than 10.5 inches wide. Select functions using left click.</td>
</tr>
<tr>
<td><strong>Search</strong></td>
<td>Left click on button.</td>
<td>Initiates OSIIS patient search and allows access to <strong>Search OSIIS Patients</strong> window</td>
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### Search OSIIIS Patients

<table>
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<th>Demographics ID:</th>
<th>OR</th>
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<tr>
<td>Last Name:</td>
<td></td>
</tr>
<tr>
<td>First Name:</td>
<td></td>
</tr>
<tr>
<td>DOB:</td>
<td>mm-dd-yyyy</td>
</tr>
<tr>
<td>SSN:</td>
<td></td>
</tr>
<tr>
<td>Phone:</td>
<td></td>
</tr>
<tr>
<td>Street:</td>
<td></td>
</tr>
<tr>
<td>Zip Code:</td>
<td></td>
</tr>
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</table>

- **Search with Soundex**

#### Patient

- **Patient**
  - Add New Patient
  - Patient Summary
  - Demographics
  - Immunizations
  - History Shots
  - Progress Notes

- Left click on button
- Select functions using left click.

- **System generated sequential identification number assigned to each OSIIIS patient**
- **Left click on button**
- Allows user to search database using a methodology based on what a word sounds like, not just its spelling

- **Left click on button.**
- Drop-down menu enabling user to access patient specific functions within OSIIIS
  - Add New Patient to a site, view and edit
  - Patient Summary data,
  - Demographics,
  - Immunizations, History Shots and Progress Notes.

#### Inventory

- Left click on button.
- Select functions using left click.

- **Drop-down menu enabling users to access vaccine inventory specific functions within OSIIIS**
  - Receive Shipments,
  - Inventory Management,
  - Transfer Inventory,
  - Vaccine Preferences,
  - Vaccine Request and Add Stock
Admin

- Change Site
- Manage Users
- Site Search
- User Search

OSIIS Reports

- Left click on Admin button.
- Select functions using left click.
- Drop-down menu enabling user to access Administrative functions within OSIIS including the ability to Change Site, Manage Users, conduct a Site Search, and User Search.

OSIIS Notifications Icon

- Left click on icon to access message window.
- Advises users of number of pending notifications using four icons:
  - System
  - Web User
  - Site
  - Shipping

User Profile

- Left click on tab.
- See User Profile Outline
- Identifies logged in user
- Allows access to view
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<tr>
<td>User</td>
<td>User Profile and Frequently Asked Questions. Users can also Change Password.</td>
</tr>
<tr>
<td>Print Icon</td>
<td>Left click on tab Allows user to print screen</td>
</tr>
<tr>
<td>Log Out Icon</td>
<td>Left click on tab Logs user out of OSIIS</td>
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Search

The Search feature gives OSIIS users the capability to search for patient records throughout the OSIIS database. Users may initiate a search by selecting the Search from the OSIIS Toolbar.

With the Search OSIIS Patient window, users find patient records by searching through different categories of patient demographic data. Users can choose one of five searchable categories.

- Demographics ID
- Last Name, First Name, Date of Birth
- Social Security Number
- Phone Number
- Street Address and Zip Code.

Once the data is entered and the Search button selected, a patient search is conducted throughout the OSIIS database.

Three (3) types of results could be generated:

- No matches found;
- A single record match;
- List containing multiple possible patient matches.

*Note: Searches resulting in greater than 100 possible matching records are not listed. Users are instead instructed to refine their search criteria and begin again (Figure 34).
When only one matching record results from the search, the record is displayed on screen using the Patient Summary tab (Figure 35).

**Demographics ID**

The Demographics ID is a unique, system-generated identifier assigned to the patient. Using this number will result in a single patient record being returned. The patient’s record is then displayed in the Patient Summary tab (Figure 36).

- Enter the patient’s Demographic ID

1. Click the Search button or press the Enter key on the keyboard. The patient record matching the entered Demographics ID will be displayed (Figure 36).
Figure 36 - Demographics ID Search Result
**Last Name, First Name, DOB**

Using the **Last Name, First Name, DOB** (date of birth) search criteria, users have some flexibility. A partial **Last Name** or **First Name** can be utilized, a full name with no **DOB** or the **DOB** alone. Searching in this manner however, may result in numerous possible matching records. To decrease the quantity of possible matches, use the following guidelines:

- Use the **DOB** whenever possible
- Use entire **Last Name** and **First Name**
- Ensure patient’s **Last Name** and **First Name** are spelled correctly

For example, the following search used the patient’s **Last and First Name** without the **DOB** (Figure 37)

![Search OSIIS Patients - Last and First Name Only](image)

Results for this search include three possible matching records. Since the character string for the **Last Name** and **First Name** are determined, but the **DOB** was not entered, the **Patient Search Results** will list all possible matching records with **Last Name** character string ‘Matthews’, and **First Name** character string ‘Brad’ with any **DOB** (Figure 38).
The Patient Summary for any record listed in the Patient Search Results can be viewed by selecting the View icon, located in the Actions column.

Viewing the Patient Summary can greatly assist in determining an accurate record match since additional patient demographic data can be verified, such as the patient’s address or phone number.

To return to the previously generated search results, use your browser window’s Back button.

Soundex Search

Users may also employ the Search with Soundex button to find a patient record. This search method can be helpful if the spelling of a patient’s Last Name is unknown. The Soundex method filters results based on what a name sounds like.

*Note: Using a Soundex search can generate numerous possible matches. The number of possible matching results that can be returned is limited to 100 patient records.

To search using Soundex (Figure 40):

- Enter the patient’s Last Name, Quack and First Name, Don.
- Click the Search with Soundex button
In this example, results from the patient search generated three possible matches. The patient, Dan Quach’s record is listed (Figure 41).

**Social Security Number (SSN)**

Using a patient’s Social Security Number will result in a single record match. Although only the last 4 digits of the SSN are viewable on the Patient Summary (Figure 42), the entire number is utilized within the search to generate a match.

- Enter the patient’s Social Security Number in the format shown.
Click the **Search** button or press the `<Enter>` key on the keyboard. The patient record matching the entered **Social Security Number** will be displayed (Figure 43).
Phone Number

A phone number search can accurately locate the patient’s record, provided the number was associated with the patient’s record when it was created or last updated. Multiple possible matching records can be returned when:

- Phone number is used for multiple related patients (family members)
- Phone number has been redistributed by phone carrier

To initiate a patient search using the patient’s phone number:

- Enter the patient’s **Phone Number** in the format shown (Figure 44).
- Click the Search button or press the Enter key on the keyboard. The patient record matching the entered Phone Number will be displayed (Figure 45).
Street Address and Zip Code

The patient’s Street Address and Zip Code or PO Box can also be used to locate matching records in OSIIS. These two should always be used in tandem to minimize the number of possible matching records generated from repetitive street names. Using the patient’s apartment number, if applicable, helps to more accurately pin point a patient’s record, since most apartment buildings use the same numerical address.

- Enter the patient’s Street Address and Zip Code (Figure 46)

![Search OSIIS Patients - Street Address and Zip Code]

- Click the Search button or press the <Enter> key on the keyboard. The patient record matching the entered Street Address and Zip Code will be displayed.
If no patient record matches the search criteria provided, the patient search results will indicate that no records were found (Figure 48).
**Patient**

**Add New Patient**

To prevent duplication and maximize the integrity of the OSIIS patient database, a Patient Search is required before a new patient can be added into the system, a Patient Search is the initial process to be completed prior to adding a new patient into OSIIS. Incorporating this feature as a precursor to adding a new patient reduces the number of duplicate records inadvertently created.

Once the patient search is completed without any positive matches, the user can then select the Add Patient button, located on the Patient Search Results window, directs users to the Patient Demographics screen. Here, essential and required patient information (marked with a red asterisk *) is captured.

Once saved, the patient record is created and assigned a Demographics ID. The patient’s record is displayed in a tabular format and consists of the Patient Summary, Demographics, Immunizations, History Shots and Progress Notes. Users may also print a patient’s Shot Record and Schedules. Adding a new patient can be cancelled at any time prior to saving by selecting the Cancel button.

For detailed instructions on use of the Search feature, please refer to the Search section of this User Guide.

From the OSIIS Homepage screen:

![Figure 49 - OSIIS Homepage- Patient Tab](image)

To begin adding a New Patient:

1. On the main menu toolbar, click Patient and select Add New Patient.
2. Search the OSIIS patient database using one of the four search criteria:
   - **Last Name** and **First Name** and **Date of Birth**
     - Enter patient’s name and DOB as indicated. Proceed to **Step 3**.
   - **or Social Security Number**
     - Enter patient’s SSN without dashes. Proceed to **Step 3**.
or **Phone Number**

- Enter the patient’s 10-digit phone number without spaces or special characters. Proceed to **Step 3**.

- **Street Address** and **Zip Code**
  - Enter the patient’s address and 5-digit zip code where indicated.
3. Click the Search button.
   - If the Last Name, First Name, DOB search option is employed and the spelling of a patient’s name is uncertain, using the Search with Soundex button can be more helpful. This search method filters results based on what a name sounds like.

   *Note: Using Search with Soundex can generate numerous possible matches. The number of results returned is limited up to 100 records.

Once the patient search results in no possible matching records, users may add the patient to the OSIIS database (Figure 54).

4. Click the Add Patient button. User will be directed to a blank Demographics form where the new patient’s immunization record is created.
Demographics

Users can access an existing patient’s Demographics by selecting Patient > Demographics from the OSIIS Homepage toolbar (Figure 55). From this point, the OSIIS Search feature is engaged to locate the patient’s record (for detailed instructions on use, refer to the Search section of this User Guide).

Figure 55 - OSIIS Homepage – Demographics

If the Search criteria used to locate a patient’s record results in a single match, the Demographics tab is displayed (Figure 56).
Figure 56 - Demographics Search Results

Two or more possible matching results are displayed in a list format (Figure 57). To view the patient's demographics information, click the Edit icon 📝.
New patient records are created in OSIIS by initially conducting a patient search. Once it has been established the patient has no existing record, users may enter the required patient information into a blank Demographics form (Figure 58).
Figure 58 – Add New Patient Demographics

Add New Patient

**Note:** Advance the cursor to the appropriate field using the <Tab> key or click on the field to highlight.

5. All fields with a red asterisk * are required and must be filled in
   - o Enter Last Name, First Name and Middle Name
     - Last Name: *
     - First Name: *
     - Middle Name: *

   - o If patient has no Middle Name, check box indicating No Middle Name
6. Add **Suffix**, if applicable

**Suffix:**

- Select-
- Select-

II
III
IV
V
Jr
Sr

7. Enter the **Date of Birth** using format MMDDYYYY or,

- Click the calendar to select the birth year. The current year is highlighted.

- Use the left arrow button to descend until the 10-year span containing patient’s birth year appears. Click on year to select.

- Click on birth month to select
Click on patient birthday

Date is now entered in DOB field

If OSIIS detects a possible duplicate record it will return a duplicate notification.

When user clicks on Click here to view, OSIIS lists all the possible duplicates based on the entered information. User can choose Select Patient from the listed recommendations if it is an exact match. Or user can click on Close to continue creating the new OSIIS record.

8. Select patient’s Gender

9. If patient is Deceased, check the box

□ Deceased
10. **Birth Country** can be easily located by typing one or two characters of the country name in the search field. Click to select from the options provided.

11. **Birth State** can be easily located by typing one or two characters of the state name in the search field. Click to select from the options provided.

12. Add patient’s **Social Security Number** (no dashes required), if available.

13. Select **Language** from drop-down menu.

14. Check **Multiple Birth?** box as applicable

15. Select **Ethnicity** from drop-down menu
16. Select **Registry Status** from the drop-down menu. This refers to the individual’s status in OSIIS as a whole. The default value for each patient will be **Active**. Site’s can go in and change this setting to the patient’s current standing with the site.

**Registry Status:**

- Active
- Inactive
- Inactive - Lost to follow-up
- Inactive - Moved or gone elsewhere
- Inactive - Permanently inactive
- Unknown

17. Enter patient’s **Mothers Maiden Name**

   - If **Maiden Name Unknown**, select checkbox

18. Check applicable box for patient’s **Race**

   **Race:**
   - American Indian/Alaskan Native
   - Asian
   - Black/African American
   - Native Hawaiian/Other Pacific Islander
   - White

   - If patient’s **Race Was Not Self-Declared**, check the applicable box (not required)

19. If patient is a **Foster Child**, check box as appropriate

20. Select the **Reminder/Recall** form the drop-down menu. This refers to how the patient would like to be contacted from the site. The default value for each patient will be 02 – Reminder/Recall – any method. Site’s can go in and change this setting to each patient’s preference.
21. Enter patient’s address in **Street 1** field. If additional space needed, use **Street 2**

22. Enter **City** name, select **State** and **Zip Code**

23. **County** can be easily located by typing one or two characters of the county name in the search field. Click to select from the options provided

24. As applicable, check the **Allow Contact** and **Bad Address** boxes (not required)

25. Enter patient’s **Birth Facility** if given

26. Enter **Comments** if necessary, in field provided
*Note: Patient Contacts or Patient Guardian are added once the patient has been successfully saved.*

27. Click the **Save Patient** button

28. The system sends confirmation that the patient record was accepted and within the database:

![Image of successful save confirmation]

29. The new patient’s data record with its newly assigned **Demographics ID** is now viewable (Figure 59).
Figure 59 - Newly Added Patient
Patient Contacts / Patient Guardians

Once the patient has been added to the OSIIS database, the Demographics page can be used to add Patient Contacts and Patient Guardians.

*Note: Any fields appearing gray are inaccessible and are not required.

To add Patient Contacts:

1. Click the Add Contact button to open the Add Patient Contact window.

2. Highlight the Contact Type to be added from the drop-down menu and click to select.
*Note: Each contact type must be added separately. For example, if adding a phone number, only the phone field will be accessible:

![Add Patient Contact](figure61.png)

Figure 61 - Patient Contact and Guardian

3. Enter the **Contact Name**

4. Check the **Allow Contact** box

5. Click the **Save Contact** button to complete. To cancel adding the contact type, click the **Cancel** button.
To add a **Patient Guardians**:

6. Click the **Add Guardian** button.

![Add Patient Guardian](image)

7. Select the type of relationship the guardian has with the patient from the **Relationship** menu.

![Relationship](image)

8. Enter guardian’s **Last Name** and **First Name** (required).

9. Enter the guardian’s **Middle Name** and **SSN** (if available)

10. If the guardian is also responsible for patient click the **Responsible For** checkbox.

11. Click the **Save Guardian** button to add the guardian to the patient’s record. To cancel adding the guardian, click the **Cancel** button.
Both the newly added **Patient Contacts** and **Patient Guardians** are viewable on the Patient Summary tab (Figure 64).
To edit or delete a guardian, users must do so in Patient Demographics within the appropriate section using the Edit or Delete icon within the Actions column (Figure 65).

Immunizations

Immunizations administered through an OSIIS provider or added through OSIIS History Shots can be viewed using the Immunizations feature. Providers can also view the forecasted vaccine schedules of all ACIP approved immunizations,
update patient immunization records and record any vaccine refusals. A link to the VAERS (Vaccine Adverse Event Report System) website is also available through Immunizations, providing users the ability to report any patient reactions to vaccine to the appropriate authorities.

Selecting Immunizations from the Patient Tab on the OSIIS Homepage will bring up the OSIIS Patient Search window. Users must first locate the patient record by utilizing one of patient search methods. Once the record is located, users are then directed to the Immunization Schedules screen.

From the Immunizations Schedules screen and by selecting the appropriate options, providers are directed to View All Immunizations, Add Immunizations or update vaccine Refusals.

To access Immunizations from the OSIIS Homepage screen:

1. At the main menu toolbar, click Patient and select Immunizations.

2. Search the OSIIS patient database using one of the search criteria:
   - Demographics ID
     - Enter patient’s ID number. Proceed to Step 7.
- or Last Name and First Name and Date of Birth
  - Enter patient’s name and DOB as indicated. Proceed to Step 7.

- or Social Security Number
  - Enter patient’s SSN without dashes. Proceed to Step 3.
- **or Phone Number**
  - Enter the patient’s 10-digit phone number without spaces or special characters. Proceed to Step 7.

- **or Street Address and Zip Code**
  - Enter the patient’s address and 5-digit zip code where indicated.
3. Click the **Search** button.

   - If the *Last Name, First Name, DOB* search option is employed and the spelling of a patient’s name is uncertain, using the **Search with Soundex** button can be more helpful. This search method filters results based on what a name sounds like.

   *Note: Using Search with Soundex can generate numerous possible matches. The number of results returned is limited up to 100 records.*

If the patient has received any immunizations in the State of Oklahoma but the record was not located, please contact the OSIIS Helpdesk at (405) 271-7200 for further assistance. Additional contact information is featured on the **OSIIS Homepage** (refer to Figure 5).

Once the patient’s record is located, the **Immunizations Schedules** screen is displayed. The patient’s **Name, DOB, Age, and Demographics ID** are shown at the top of the record (Figure 72).
Immunization Schedules

In Immunization Schedules, users are able to view the list of ACIP (Advisory Committee on Immunization Practices) recommended vaccines and the last known date the patient received a vaccine (Last Given Date). The Recommended Date, Earliest Date and Past Due Date forecast future immunizations. Status gives provider sites a clear indication of which vaccinations should be administered to keep the patient current (Figure 73). A quick reference for each Status icon is provided in Table 1, below.
### Immunization Schedules

#### Vaccination Schedules

<table>
<thead>
<tr>
<th>Series Name</th>
<th>Last Given Date</th>
<th>Recommended Date</th>
<th>Earliest Date</th>
<th>Past Due Date</th>
<th>Status</th>
<th>Refusals</th>
<th>Reactions</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTaP/DT</td>
<td>8/3/2004</td>
<td>8/15/2022</td>
<td>8/15/2017</td>
<td>9/14/2022</td>
<td>Current</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rotavirus</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Not indicated</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pneumonia Conjugate (PCV)</td>
<td>10/22/2001</td>
<td></td>
<td></td>
<td></td>
<td>Complete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HPV</td>
<td>10/2/2015</td>
<td></td>
<td></td>
<td></td>
<td>Complete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tdap</td>
<td>8/15/2012</td>
<td></td>
<td></td>
<td></td>
<td>Complete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MMR</td>
<td>8/3/2004</td>
<td></td>
<td></td>
<td></td>
<td>Complete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hib</td>
<td>10/22/2001</td>
<td></td>
<td></td>
<td></td>
<td>Complete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Polio</td>
<td>8/3/2004</td>
<td></td>
<td></td>
<td></td>
<td>Complete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Varicella</td>
<td>8/15/2012</td>
<td></td>
<td></td>
<td></td>
<td>Complete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hep-B</td>
<td>1/4/2001</td>
<td></td>
<td></td>
<td></td>
<td>Complete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hep - A</td>
<td>8/3/2004</td>
<td></td>
<td></td>
<td></td>
<td>Complete</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

VAERS - Vaccine Adverse Event Reporting System

**Figure 73 – Forecasted Vaccination Intervals and Status**
<table>
<thead>
<tr>
<th>STATUS</th>
<th>ICON</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
<td>✓</td>
<td>Meets forecasted immunization date</td>
</tr>
<tr>
<td>Complete</td>
<td>✓</td>
<td>Requires no additional immunization</td>
</tr>
<tr>
<td>Not Indicated</td>
<td>?</td>
<td>No information available</td>
</tr>
<tr>
<td>Due</td>
<td>🔄</td>
<td>Within forecasted immunization date</td>
</tr>
<tr>
<td>Past Due</td>
<td>🚸</td>
<td>Exceeded forecasted immunization date</td>
</tr>
</tbody>
</table>

Table 1 - Vaccine Status Icons

Any Refusals to having a vaccine administered or Reactions to a vaccine are indicated by a check within the appropriate column (Figure 74).

Figure 74 - Vaccination Schedules- Refusals and Reactions
View Immunizations

The **Immunization Schedules** screen allows users to view a patient’s immunizations by the vaccine name or collectively.

To view immunizations by name, click on the vaccine located in the **Series Name** column. A drop-down menu will display all of the patient’s immunizations within the series (Figure 75).

![Immunization Schedules](image)

**Table 2** gives users a description of the information provided for each dose within a vaccine series.
<table>
<thead>
<tr>
<th>PARAMETER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Given</td>
<td>Date vaccine given to patient</td>
</tr>
<tr>
<td>Vaccine</td>
<td>Name of vaccine patient received</td>
</tr>
<tr>
<td>Brand Name</td>
<td>Vaccine manufacturer’s name</td>
</tr>
<tr>
<td>(View Series only)</td>
<td></td>
</tr>
<tr>
<td>Dose #</td>
<td>Sequence in which vaccine was given</td>
</tr>
<tr>
<td>Lot #</td>
<td>Lot Number of vaccine</td>
</tr>
<tr>
<td>Given By</td>
<td>Name of provider administering vaccine</td>
</tr>
<tr>
<td>Site</td>
<td>Location on body vaccine was administered to</td>
</tr>
<tr>
<td>Valid</td>
<td>Dose valid through forecaster</td>
</tr>
<tr>
<td></td>
<td>Dose invalid</td>
</tr>
<tr>
<td>History</td>
<td>If checked, ✔️ the vaccine was updated to patient’s immunization record using History Shots</td>
</tr>
<tr>
<td>Reactions</td>
<td>If checked, ✔️ patient experienced an adverse reaction to vaccine reportable through VAERS</td>
</tr>
<tr>
<td>Actions</td>
<td>Delete vaccine.</td>
</tr>
<tr>
<td>(Available in View All Only)</td>
<td>Users must confirm any action by selecting the OK button. To cancel the action, click the Cancel button</td>
</tr>
</tbody>
</table>

Table 2 – Vaccine Schedule

To view the entire list of immunizations received, click the View All Immunizations button. Vaccines are displayed alphabetically, beginning with the most recent (Figure 76).
### Patient Immunizations

<table>
<thead>
<tr>
<th>Date Given</th>
<th>Vaccine</th>
<th>Lot Number</th>
<th>Given By</th>
<th>Imm Site</th>
<th>Valid?</th>
<th>History</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/3/2004</td>
<td>DTaP, 5 pertussis antigens</td>
<td>DTPA659A2</td>
<td>DL-Left Deltoid</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/22/2001</td>
<td>DTaP, 5 pertussis antigens</td>
<td>DTPA659A2</td>
<td>DL-Left Deltoid</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1/4/2001</td>
<td>DTaP, 5 pertussis antigens</td>
<td>DTPA659A2</td>
<td>LVL-Left Vastus Lateralis</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/27/2000</td>
<td>DTaP, 5 pertussis antigens</td>
<td>DTPA659A2</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8/18/2000</td>
<td>DTaP, 5 pertussis antigens</td>
<td>DTPA659A2</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7/24/2002</td>
<td>Hep A, pediatric, 2 dose</td>
<td>VHA814A2</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6/28/2000</td>
<td>Hep B, adolescent or pediatric</td>
<td>0316K</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/22/2001</td>
<td>Hib (HbOC)</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1/4/2001</td>
<td>Hib-Hep B</td>
<td>0290K</td>
<td>RVL-Right Vastus Lateralis</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/27/2000</td>
<td>Hib-Hep B</td>
<td>0290K</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8/18/2000</td>
<td>Hib-Hep B</td>
<td>0290K</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/2/2015</td>
<td>HPV, quadrivalent</td>
<td>L007560</td>
<td>DL-Left Deltoid</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8/9/2014</td>
<td>HPV, quadrivalent</td>
<td>J099243</td>
<td>DL-Left Deltoid</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12/27/2013</td>
<td>HPV, quadrivalent</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8/3/2004</td>
<td>IPV</td>
<td>X0797-2</td>
<td>RD-Right Deltoid</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1/4/2001</td>
<td>IPV</td>
<td>R1251-2</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/27/2000</td>
<td>IPV</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8/18/2000</td>
<td>IPV</td>
<td>R1846-2</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8/15/2012</td>
<td>Meningococcal MCV4</td>
<td>M100560-NONVFC</td>
<td>DL-Left Deltoid</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8/6/2004</td>
<td>MMR</td>
<td>0040P</td>
<td>RA-Right Upper Arm</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/22/2001</td>
<td>MMR</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/22/2001</td>
<td>Pneumococcal conjugate PCV 7</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4/17/2001</td>
<td>Pneumococcal conjugate PCV 7</td>
<td>472-550</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8/18/2000</td>
<td>Pneumococcal conjugate PCV 7</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8/15/2012</td>
<td>Tdap</td>
<td>U4393BA-NONVFC</td>
<td>DL-Left Deltoid</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8/15/2012</td>
<td>Varicella</td>
<td>G007451-NONVFC</td>
<td>RA-Right Upper Arm</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7/10/2001</td>
<td>Varicella</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Figure 76 – Patient Immunizations - View All*

**Note:** A vaccine can be deleted in **View All immunizations** by clicking the **Delete** icon.

Users must confirm the delete by selecting the **OK** button. To cancel the action, click the **Cancel** button.

---

Click the **View Schedules** button to return to the **Immunization Schedules** (Figure 72).
Add Immunizations

Immunizations administered to a patient by an OSIIS provider are added to the patient’s record using the Add Immunizations button located in the upper, left hand corner of the Immunizations Schedules screen.

Users are then directed to the access Add/Edit Immunizations screen (Figure 77). All fields with the exception of Has Reaction checkbox are required.

Providers will select the vaccine given from the site’s available vaccine inventory. Once the immunization is saved, OSIIS will reflect the patient’s updated records and changes to the site’s vaccine inventory. Should any error be incurred when adding a patient, it can easily be corrected once the required information is entered. Table xx lists the most commonly encountered errors and how they can be addressed.

To cancel adding an immunization, click the Cancel button. Users will be returned to Immunization Schedules Screen (Figure 72).

*Note: To progress to the next field, use the keyboard <Tab> key to highlight the field, or click on the field to highlight. To make a selection for a field containing a down arrow , click the arrow to access the drop-down list of available choices. Move the cursor over the selection to highlight and click to select.

To begin adding an immunization, from the Add/Edit Immunization screen (Figure 77):
1. Verify the **Date Given** is correct. It is auto-populated to the current date. User may enter the date using the mm/dd/yyyy format or use the calendar icon to select a date from the calendar.

2. **Has Reaction** – Selected only if patient has a reaction.

3. **Given By** – Select from the list of site-specific individuals. Move cursor over selection to highlight and click to select.

4. **Ordering Authority** – Choose the ordering authority by moving the cursor over the name to highlight and click to select.
5. **Vaccine Given** – Use the vertical scroll bar to browse the list of vaccines available within the site’s inventory. Highlight and click to select.

![Vaccine Given](image)

Or, enter the first letter of the vaccine name in the search field. Click to select from the listed vaccines.

**Vaccine Given:**

6. Once the **Vaccine Given** is selected, user must select the **VIS Version** of the vaccine. Move cursor over selection to highlight and click to select.

![VIS Version](image)

7. **Funding Source** - Move cursor to select the Funding Source for the vaccine and click to select.
*Note: The Funding Source selected must correlate to the selected vaccine’s funding source. You can check the site’s vaccine inventory information using the OSIIS Toolbar and select Inventory>Inventory Management.

8. VIS Given Date - Verify the VIS Given Date is correct. It is auto-populated to the current date. User may enter the date using the mm/dd/yyyy format or use the calendar icon to select the date from the calendar.

9. Eligibility – Select the patient’s insurance eligibility from the list of options.

10. Route – Select method vaccine was given.

11. Administration Site - Select where on patient’s body vaccine was given using either the vertical scroll bar
or by entering the first letter of the proposed administration site in the **Search** field. Click to select from the listed administration sites.

11. Once form is completed, click the **Save Immunization** button to add the immunization to the patient’s shot record.
12. Upon successfully adding the immunization to the patient’s record, a confirmation message is displayed at the upper, right hand corner of the screen.

   a. Users must also acknowledge if another immunization will be added. Select to stay on the Add/Edit immunization screen or to return to the Immunizations Schedules screen.

The newly added immunization is reflected throughout OSIIS and is viewable in the patient’s Immunization Schedules (Figure 79), Immunization Status Report (Figure 80) and Immunization Record (Figure 81).
**Figure 79 - Updated Immunization Schedules**

<table>
<thead>
<tr>
<th>Vaccine Name</th>
<th>Last Given Date</th>
<th>Recommended Date</th>
<th>Earliest Date</th>
<th>Past Due Date</th>
<th>Status</th>
<th>Refusals</th>
<th>Reactions</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTaP/BT</td>
<td>2/10/2016</td>
<td>1/21/2016</td>
<td>3/11/2016</td>
<td></td>
<td>Current</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rotavirus</td>
<td>2/10/2016</td>
<td>1/21/2016</td>
<td>3/11/2016</td>
<td></td>
<td>Current</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pneumococcal Conjugate (PCV)</td>
<td>2/10/2016</td>
<td>1/21/2016</td>
<td>3/11/2016</td>
<td></td>
<td>Current</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HPV</td>
<td>12/10/2026</td>
<td>12/10/2024</td>
<td>12/10/2028</td>
<td></td>
<td>Current</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tdap</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Not Indicated</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flu</td>
<td>6/10/2016</td>
<td>6/10/2016</td>
<td>7/10/2016</td>
<td></td>
<td>Current</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MMR</td>
<td>12/10/2016</td>
<td>12/10/2016</td>
<td>4/10/2017</td>
<td></td>
<td>Current</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hib</td>
<td>2/10/2016</td>
<td>1/21/2016</td>
<td>3/11/2016</td>
<td></td>
<td>Current</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Polio</td>
<td>2/10/2016</td>
<td>1/21/2016</td>
<td>8/11/2016</td>
<td></td>
<td>Current</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Varicella</td>
<td>12/10/2016</td>
<td>12/10/2016</td>
<td>4/10/2017</td>
<td></td>
<td>Current</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hep-A</td>
<td>12/10/2016</td>
<td>12/10/2016</td>
<td>12/10/2017</td>
<td></td>
<td>Current</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

VAERS - Vaccine Adverse Event Reporting System
# Immunization Schedule Status Report

This form was created using the Oklahoma State Immunization Information System (OSIIS) of the Oklahoma State Department of Health (OSDH).

By law, your child must meet Oklahoma immunization requirements to be enrolled in school or child care.

The status screen is based on the ACIP recommended schedule and the data entered by end users. This screen displays only valid doses. Doses administered at less than the minimum interval or minimum age will not be displayed on this screen. If no history shots have been entered, then the system has to assume that no other shots have been given.

### Name: WELLS, DECOREY S.  Date Of Birth: 12/10/2015  Gender: M  Client ID: 3340452

### Exemptions: None

<table>
<thead>
<tr>
<th>Series Name</th>
<th>Last Given Date</th>
<th>Recommended Date</th>
<th>Earliest Next Date</th>
<th>Past Due Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTaP/DT</td>
<td>2/10/2016</td>
<td>1/21/2016</td>
<td>3/11/2016</td>
<td>Current</td>
<td></td>
</tr>
<tr>
<td>Rotavirus</td>
<td>2/10/2016</td>
<td>1/21/2016</td>
<td>3/11/2016</td>
<td>Current</td>
<td></td>
</tr>
<tr>
<td>Pneumo Conjugate (PCV)</td>
<td>2/10/2016</td>
<td>1/21/2016</td>
<td>3/11/2016</td>
<td>Current</td>
<td></td>
</tr>
<tr>
<td>HPV</td>
<td>12/10/2026</td>
<td>12/10/2024</td>
<td>12/10/2028</td>
<td>Current</td>
<td></td>
</tr>
<tr>
<td>Tdap</td>
<td></td>
<td></td>
<td></td>
<td>Not Indicated</td>
<td></td>
</tr>
<tr>
<td>Flu</td>
<td>6/10/2016</td>
<td>8/10/2016</td>
<td>7/10/2016</td>
<td>Current</td>
<td></td>
</tr>
<tr>
<td>MMR</td>
<td>12/10/2016</td>
<td>12/10/2016</td>
<td>4/10/2017</td>
<td>Current</td>
<td></td>
</tr>
<tr>
<td>Hib</td>
<td>2/10/2016</td>
<td>1/21/2016</td>
<td>3/11/2016</td>
<td>Current</td>
<td></td>
</tr>
<tr>
<td>Polio</td>
<td>2/10/2016</td>
<td>1/21/2016</td>
<td>3/11/2016</td>
<td>Current</td>
<td></td>
</tr>
<tr>
<td>Varicella</td>
<td>12/10/2016</td>
<td>12/10/2016</td>
<td>4/10/2017</td>
<td>Current</td>
<td></td>
</tr>
<tr>
<td><strong>Hep.B</strong></td>
<td><strong>12/11/2015</strong></td>
<td><strong>1/8/2016</strong></td>
<td><strong>1/11/2016</strong></td>
<td><strong>Current</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Hep - A</strong></td>
<td><strong>12/10/2016</strong></td>
<td><strong>12/10/2016</strong></td>
<td><strong>12/10/2017</strong></td>
<td><strong>Current</strong></td>
<td></td>
</tr>
</tbody>
</table>

Figure 80 - Updated Immunization Status Report
The quantity of available vaccine from the selected vaccine lot number will decrease and is viewable via Inventory Management.

**Refusals**

Clicking Refusals button takes user to Vaccine Refusal screen (Figure 82).
1. **Select Schedule** – drop-down menu of vaccine patient does not wish to have administered

   ![Selected Schedule](image)

2. **Refusal Date** – add date using calendar or by typing in mm/dd/yyyy format.

3. **Refusal Reason** – drop-down menu to select from three reasons: Patient Decision, Parent Decision, Other

   ![Refusal Reason](image)

4. Click **Save Refusal** button to update the Vaccine Refusal List or **Close** button to return to Immunization Schedules.
5. A confirmation of the successful addition of the refusal is broadcast in the upper right hand corner of the screen. The Vaccine Refusal List is also updated (Figure 84).

6. Select the Close button to return to the Immunizations Schedules. The vaccine Refusals column will indicate the newly added refusal (Figure 85).
Reactions

A reaction to a vaccine can be added to the patient’s record in OSIIS by editing that particular immunization. Users must have the appropriate permissions in OSIIS to perform this task.

The Immunization Schedules screen provides a hyperlink to the Vaccine Adverse Event Reporting System (VAERS) website giving users the capability to report vaccine reactions from the patient’s record as appropriate.

From the Immunizations Schedules:

1. Click the View All Immunizations button to access the list of the patient’s immunizations (Figure 86).
2. At the **Patient Immunizations** screen select the **Edit** icon for the vaccine the patient had a reaction to (Figure 87).

3. Click to check the reaction experienced by the patient from the **Immunization Reactions** window and then click the **Save Reactions** button (Figure 88).
4. At the Add/Edit Immunizations screen click the Save Immunization button to complete adding the reaction. Select the Cancel button if the reaction no longer needs to be added.
5. Once saved, users are returned to the **Immunizations Schedules** screen where a checkmark ✔ in the **Reactions** column confirms the reaction has been added to the patient’s record (Figure 90).
6. When viewing the Patient Immunizations the Actions column now displays the Caution icon \(\text{⚠️} \) noting a reaction to the vaccine (Figure 91). The patient’s immunization record will also reflect the reaction (Figure 91).

**Figure 90 – Updated immunization Schedules**

**Figure 91 - Updated Hep B Immunizations Patient 3340452**
<table>
<thead>
<tr>
<th>Vaccine Name</th>
<th>Date Given</th>
<th>Given By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hep B</td>
<td>12/11/2015</td>
<td>GRAND LAKE FAMILY MEDICINE</td>
</tr>
</tbody>
</table>

**Legend:** ©Invalid dose.

Printed By:  20641 - GRAND LAKE FAMILY MEDICINE - GROVE

Signature: ___________________ Date: ___________________

Clinic Stamp

Figure 92 - Updated Shot Record Reaction Hep B
History Shots

To begin updating a patient’s shot record:

1. At OSIIS Homepage main menu Toolbar, click Patient tab and select History Shots.
2. Search the OSIIS patient database using one of the search criteria:
   - **Demographics ID**
     - Enter patient’s ID number. Proceed to **Step 3**.
   - or **Last Name** and **First Name** and **Date of Birth**
     - Enter patient’s name and DOB as indicated. Proceed to **Step 3**.
   - or **Social Security Number**
     - Enter patient’s SSN without dashes. Proceed to **Step 3**.
Figure 97 - Patient Search - SSN
- **or Phone Number**
  - Enter the patient’s 10-digit phone number without spaces or special characters. Proceed to **Step 3**.

- **or Street Address and Zip Code**
  - Enter the patient’s address and 5-digit zip code where indicated.

3. Click the **Search** button.

- If the spelling of a patient’s **Last Name** is uncertain, using the **Search with Soundex** button can be more useful. This search method filters results based on what a name sounds like.
*Note: Using Search with Soundex can generate numerous possible matches. The number of results returned is limited up to 100 records.

4. Once the patient’s record is located, the **History Shots** screen is displayed and vaccines can be added to the patient’s immunization record (Figure 100).

![History Shots Vaccine List](image-url)

---

**Figure 100 - History Shots Vaccine List**
5. Click the checkbox to the left of the vaccine to be entered from list provided.

6. Enter the date immunization was administered using the calendar or type in using the mm/dd/yyyy format.

7. Click the **Enter Shots** button. All selected vaccine(s) will now be listed in the **Save History Shots** window (Figure 101).
   - If no vaccine has been selected, an error message is broadcast in the top, right corner of the screen. Ensure the vaccine to be added is checked and repeat **Step 3**.

8. Enter date the immunization was given.
   - If no date provided history shot will not be save and error message broadcast in the top, right corner of the screen (Figure 102).
9. Enter the vaccine **Lot Number** if available (optional).

10. Enter the name of the facility where vaccine was administered **Given By** (optional).

11. Click **Save History Shots** button.

12. Once saved, a confirmation of the successful save is broadcast in the upper, right hand corner of the **History Shots** screen.

Updates from the History Shots will appear on the patient’s official State of Oklahoma **Immunization Record** (Figure 103) and **Immunization Schedule Status Report** (Figure 104).

13. To view and or print the patient’s **Immunization Record**, click the **Shot Record** button.
14. To view and or print the patient’s **Immunization Schedule Status Report**, click the **Schedules** button.
**Figure 104 – History Shots – Updated Immunization Status Report**

The status screen is based on the ACIP recommended schedule and the data entered by end users. This screen displays only valid doses. Doses administered at less than the minimum interval or minimum age will not be displayed on this screen. If no history shots have been entered, then the system has to assume that no other shots have been given.

<table>
<thead>
<tr>
<th>Series Name</th>
<th>Last Given Date</th>
<th>Recommended Date</th>
<th>Earliest Next Date</th>
<th>Past Due Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTaP/DT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Not Indicated</td>
</tr>
<tr>
<td>Rotavirus</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Not Indicated</td>
</tr>
<tr>
<td>Pneumo Conjugate (PCV)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Not Indicated</td>
</tr>
<tr>
<td>HPV</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Not Indicated</td>
</tr>
<tr>
<td>Tdap</td>
<td>11/10/2015</td>
<td></td>
<td></td>
<td></td>
<td>Complete</td>
</tr>
<tr>
<td>Flu</td>
<td>10/6/2015</td>
<td>10/1/2016</td>
<td>8/1/2016</td>
<td>10/31/2016</td>
<td>Current</td>
</tr>
<tr>
<td>Hib</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Not Indicated</td>
</tr>
<tr>
<td>Polio</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Not Indicated</td>
</tr>
<tr>
<td>Varicella</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Not Indicated</td>
</tr>
</tbody>
</table>
Progress Notes

The Progress Notes feature in OSIIS allows users to annotate a patient’s records as necessary and view notes entered by other providers.

To begin adding patient Progress Notes from the OSIIS Homepage:

1. Click Patient tab. Scroll down and click to select Progress Notes.

2. Conduct a patient search using one of the five following search categories:
   - Demographics ID
     - Click on the Demographics field. Enter patient’s ID number. Proceed to Step 3.
Figure 106 - Search OSIIS Patients - Demographics ID

- **or Last Name and First Name and Date of Birth**
  - Enter patient’s name and DOB as indicated. Proceed to **Step 3**.

Figure 107 - Patient Search-Last Name, First Name, DOB

- **or Social Security Number**
  - Enter patient’s SSN without dashes. Proceed to **Step 3**.
or **Phone Number**
  - Enter the patient’s 10-digit phone number without spaces or special characters. Proceed to **Step 3.**

- **Street Address and Zip Code**
  - Enter the patient’s address and 5-digit zip code where indicated. Proceed to **Step 3.**
3. Click the **Search** button.

   - If the Last Name, First Name, DOB search option is employed and the spelling of a patient’s name is uncertain, using the **Search with Soundex** button can be more helpful. This search method filters results based on what a name sounds like.

   *Note: Using **Search with Soundex** can generate numerous possible matches. The number of results returned is limited up to 100 records. For detailed instructions refer to the **Search** section of this user guide.*

Once a single record is returned, users are directed to the patient’s Progress Notes Screen (Figure 111).

4. Click the **Add Progress Notes** button to access the **Add/Edit Notes** window.
5. Add the text to the **Note** field

6. Click the **Save Progress Note** button to complete or click the **Close** button to cancel the progress note.

The successful addition of the **Progress Note** is broadcast to the top, right corner of the screen (Figure 112).

**Table 3** gives a brief explanation of the information auto-populated to the Progress Note when saved.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Date</td>
<td>Date progress note entry is made/updated</td>
</tr>
<tr>
<td>Is Public</td>
<td>Check mark indicates progress note will be seen by all users</td>
</tr>
</tbody>
</table>

*Default*
Inventory

The Inventory module allows OSIIS users to control and monitor the site’s vaccine quantities. Specific functions include:

- Receive Shipments
- Manage Inventory
- Transfer Inventory
- Vaccine Preferences
- Vaccine Request
- Add Stock

Receive Shipments

Prior to any physical vaccine quantities being reflected in the site’s inventory, it must first be received electronically through OSIIS. Providers will receive a notification of vaccine inventory being shipped as indicated through the OSIIS notification system. Shipments available to be received are listed at the Receive Shipments screen (Figure 113). Users can verify all information pertaining to the shipment by checking the Shipment ID, Shipment Type, Inventory ID, Item Description, Quantity Shipped and Shipped Date to the physical package.

1. At the main menu toolbar, click Inventory tab and select Receive Shipments
2. In the Receive Items window, user will enter the **Lot Number** for the items received.
3. Enter the quantity accepted Qty Accepted  
   o If items are damaged or not included, **this is not where you correct that**
4. Click the Verify Receive Shipment button  
   o A confirmation message will broadcast, click **OK** to continue
   o If received successfully, confirmation of receipt will appear and list will no longer contain the shipment
5. Shipment can now be viewed as part of the site’s current inventory
   - Click **Manage Inventory** tab to access the **Current Inventory** screen
   - Under the **Description** column locate the vaccine, then click the **View Transaction** icon
6. The received inventory is then stored and posted as a transaction.

7. Click the Close button to return to the **Current Inventory** screen.
Inventory Management

The Inventory Management tab indicates the site’s current vaccine stock. To view these quantities from the OSIIS Homepage:

1. Click the Inventory tab and select Inventory Management from the drop-down menu. Users are directed to the Current Inventory window.

At the Current Inventory screen, users can modify and adjust the quantity of a site’s vaccine inventory. Vaccine that is approaching its expiration date is indicated using the Almost Expired icon and appears 30 days prior to expiration. Vaccine that has expired is indicated using the Expired icon (Figure 116).
Inventory Adjustments can be made due to:

- **Excess** — when a multi-dose vial contains more vaccine than it should. For example, getting 11 doses out of a 10 dose vial of IPV.
- **Expired** — when a vaccine has exceeded the printed expiration date.
- **Spoiled** — used when vaccine is left out on counter or non-viable due to temperature excursion or other quality concerns.
- **VFC Replacement** — used to replace VFC vaccine that was incorrectly used with Privately Purchased or Locally Purchased Vaccine.

To make a vaccine adjustment:

1. Click the **Inventory Adjustments** icon for the vaccine to be adjusted. The **Local Qty** for DTAP-SDV Daptacel (SANOFI) is 4.
2. In the Adjust Inventory window, click the down arrow at Adjustment Reasons menu to select a reason the Current Quantity of the vaccine requires modification. Press the keyboard <Tab> key to move to the next field.
3. In the **Adjustment Quantity** field, enter the quantity of vaccine. This is the number of vaccine that will be **subtracted** from the **Current Quantity** since the reason for adjustment is **Spoilage**.

4. Press the Tab key or click the left mouse button. The **Adjustment Quantity** will be automatically updated to a negative number, as in this example, **2**.

*Note: Adjustment Reasons **Expired**, and **VFC Replacement** also subtract from the **Current Quantity** of the vaccine.*

![Adjust Inventory](image)

○ The **Quantity after Adjustment** field is also automatically populated to the correct quantity of vaccine that will be available once the adjustment is saved.

5. Click the Comments field to add a comment (required)

6. Click the **Save Adjustment** button to complete the adjustment
7. The **Manage Inventory** screen will now update to show a new **Local Qty 2** for DTAP-SDV Daptacel (SANOFI) vaccine.
The completed transaction is now viewable in the vaccine’s **View Items Transactions** window. To view:

1. **Click the View Items Transactions icon**

![Figure 121 – Manage Inventory](Image)

![Figure 122 – Manage Inventory](Image)
2. The **View Inventory Item Transactions** window displays details for the decreased quantity of vaccine DTAP-SDV Daptacel (SANOFI). Click the **Close** button to return the **Current Inventory** screen.

![View Inventory Item Transactions](image)

*Figure 123 – View Inventory Item Transactions*

The **Modify Inventory Item** icon is used to correct any typographical errors in the vaccine **Lot Number** or to correct the vaccine **Expiration Date**.

**This feature is available only for vaccines whose funding source is indicated as Private/Locally Purchased.** Any vaccine previously administered to a patient and subsequently corrected using **Modify Inventory Item**, will also be automatically updated through OSIIS. Patient records will be maintained using the most up to date vaccine information available.
To make a modification to a vaccine:

1. In the **Action** column, click the **Modify Inventory Item** icon within the row of the vaccine to be modified. The **Modify Inventory Item** window will be displayed.

![Modify Inventory Item Window](image)

2. At the **Modify Inventory Item** window, only the vaccine **Lot Number** and the **Expiration Date** fields can be edited, all other fields are grayed and inaccessible.

3. Move cursor to the field to be modified and click the left mouse button. Use the keyboard **Backspace** key to delete entry or highlight entry and press the **Delete** key.

4. Enter the new **Lot Number** or **Expiration Date** in the format shown. The date can also be selected using the **Date Picker** calendar icon.

![Modify Inventory Item Window](image)
5. Click the **Save Modification** button to complete. The modifications will be reflected on the **Current Inventory** screen and within any patient records who received an immunization from the previous Lot Number. A confirmation message will also appear briefly, verifying successful completion of the modifications.

The **Current Inventory** page can also be exported from OSIIS in two formats, **EXCEL** or **PDF**. Users can select either format by clicking on the Excel or PDF button located in the upper right hand corner of the screen.

![Figure 125 - Modified Varicella Vaccine](image)

![Figure 126 – Current Inventory](image)
Users can choose how to display the current vaccine inventory, depending upon the amount of vaccine available at the site.
The records per page quantity is adjustable and can display 10, 25, 50 records per page, or ALL the records at once.

- Change the number of records displayed per page by clicking the down caret then click the quantity to be displayed.
The vaccine inventory can also be filtered using the **Search** engine available in the upper right hand corner.

---

**Figure 128 – Current Inventory**

- The vaccine inventory can also be filtered using the **Search** engine available in the upper right hand corner.
Records are returned according to characters matched from the search field to those occurring within the vaccine Description, NDC # (National Drug Code) and Lot Number.
Vaccine Preferences

The Vaccine Preference option gives site users the opportunity to select which brand of vaccine is regularly delivered to the site. Preferred vaccine choices are stored in the vaccine management system (VTrks). Vaccine preferences can be set, deleted and viewed using this option. If for some reason a preference has not been selected for a vaccine shipped through VTrks on a regular basis and more than one choice is available, vaccine management will make these choices for a sites, based on its previous order history.

To set, delete or view a vaccine preference:

1. Click the Inventory tab then select Vaccine Preferences.
2. Users will be directed to the site Vaccine Preferences window
3. The vaccine delivery schedule is posted center screen, advising users of when and how frequently to expect vaccine shipments at their site.

Records in the vaccine preference window can be displayed increments of **10, 25, or 50** per page, or **ALL** records at once. Change the number of records displayed per page by clicking the down caret \( \downarrow \) then click the quantity to be displayed.  

![Records per page](image)

**Figure 131 – Vaccine Preferences**
### Vaccine Preferences

<table>
<thead>
<tr>
<th>CatalogID</th>
<th>Catalog Description</th>
<th>Item Description</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>94</td>
<td>DTaP</td>
<td>DTaP - SDV Difco (Aventis)</td>
<td></td>
</tr>
<tr>
<td>95</td>
<td>DTaP-Hib</td>
<td>DTaP-Hib</td>
<td></td>
</tr>
<tr>
<td>96</td>
<td>Hib-PRP-DTP</td>
<td>Hib-PRP-DTP</td>
<td></td>
</tr>
<tr>
<td>97</td>
<td>Hib-PRP-T (AchHB/Hibrix/Pedvax)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>HPV (Gardasil)</td>
<td>HPV-Gardasil</td>
<td></td>
</tr>
<tr>
<td>99</td>
<td>FLUMIST</td>
<td>Influenza-LAN - Nasal FLUMIST</td>
<td></td>
</tr>
<tr>
<td>102</td>
<td>DTaP-IPV-Hib</td>
<td>DTaP-IPV-Hib</td>
<td></td>
</tr>
<tr>
<td>104</td>
<td>Hep A Pediatric</td>
<td>Hep A Pediatric</td>
<td></td>
</tr>
<tr>
<td>105</td>
<td>Hep A Hep B Adult</td>
<td>Hep A Hep B Adult</td>
<td></td>
</tr>
<tr>
<td>106</td>
<td>Hep B Adult</td>
<td>Hep B Adult</td>
<td></td>
</tr>
<tr>
<td>108</td>
<td>IPV</td>
<td>IPV</td>
<td></td>
</tr>
<tr>
<td>109</td>
<td>MCV4 (Menactra)</td>
<td>MCV4 (Menactra)</td>
<td></td>
</tr>
<tr>
<td>110</td>
<td>MMR</td>
<td>MMR</td>
<td></td>
</tr>
<tr>
<td>111</td>
<td>MMRV</td>
<td>MMRV - SDV ProQuad (Merck)</td>
<td></td>
</tr>
<tr>
<td>112</td>
<td>Pneumovax Conjugate 13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>113</td>
<td>Pneumococcal Polysaccharide PPSV23</td>
<td></td>
<td></td>
</tr>
<tr>
<td>115</td>
<td>Rotarix/Repevax</td>
<td>Rotarix/Repevax</td>
<td></td>
</tr>
<tr>
<td>116</td>
<td>Tdap (Adacel)</td>
<td>Tdap (Adacel)</td>
<td></td>
</tr>
<tr>
<td>117</td>
<td>Td</td>
<td>Td</td>
<td></td>
</tr>
<tr>
<td>118</td>
<td>Varicella</td>
<td>Varicella - SDV Varivax (Merck)</td>
<td></td>
</tr>
<tr>
<td>123</td>
<td>MMR-CONJ (Menvac)</td>
<td>MMR-CONJ (Menvac)</td>
<td></td>
</tr>
<tr>
<td>126</td>
<td>Hepatitis B Pediatric Add 0.5 mL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>128</td>
<td>Hep B Adult</td>
<td>Hep B Adult</td>
<td></td>
</tr>
<tr>
<td>129</td>
<td>Influenza A/B</td>
<td>Influenza A/B</td>
<td></td>
</tr>
<tr>
<td>146</td>
<td>Cholera Vaccine</td>
<td>Cholera Vaccine</td>
<td></td>
</tr>
</tbody>
</table>

Records displayed may also be filtered using the Search feature. Vaccine records are returned that match the characters entered in the Search field.
Users can search using both numbers and letters

Figure 133 – Vaccine Preferences
To set a vaccine preference:

1. In the Actions column click the Set Preference icon to display the Set Item Preference window.

2. The previously selected preference is displayed.

3. Click the down caret to display list of vaccine(s)
4. Move cursor to highlight new **Preferred Item** and click to select.

5. Click the **Set Preference** button. User is directed back to the **Vaccine Preferences** screen.

6. Confirmation of the successfully saved vaccine preference will briefly appear in the top, right corner of the screen.

7. The newly selected preference is now displayed on **Vaccine Preference** screen and updated.
To view the auto order details for a vaccine:

1. In the Actions column, click the *View Auto Order Details*

![Vaccine Preferences](image)

**Figure 136 – Vaccine Preferences**

2. Automatic Reorder Details are displayed. Order details cannot be edited on this screen.

![Automatic Reorder Details](image)

To delete a vaccine preference:

1. In the Actions column click the *Delete Preference* icon for the vaccine to be deleted.
2. User must confirm intention to delete the set vaccine preference. Click **OK** to continue

3. Confirmation of the successfully deleted vaccine preference will briefly appear in the top, right corner of the screen.

4. Vaccine Preference is now deleted from the Vaccine Preference screen.
Add Stock

The Add Stock feature of OSIIS is used to update site inventory with vaccine quantities acquired with private or local funding. A Vaccine Request or regularly scheduled vaccine shipments are administered through OSIIS Administration since these vaccines are funded through federal or state resources.

To update site quantities for vaccine stock purchased by private or local resources:

1. From the Homepage toolbar, click the Inventory tab then select Add Stock

   ![Inventory Tab](image)

2. Users will then be directed to the Add Stock screen

   ![Add Stock Screen](image)

3. Click the Vaccine Type field to access the drop-down menu of vaccines.
4. Use the vertical scroll bar to browse through the alphabetized list of vaccine types, or use the Search option to find the vaccine type.
To perform a search, type the first letter of the vaccine. Any vaccine type containing the letter will now be listed. In this example, the letter ‘F’ is used to locate the vaccine type FLUMIST.

Move the cursor over vaccine type to highlight, then click to select

5. Click the Vaccine Name field to display all available vaccine names for the vaccine type selected

Move the cursor over Vaccine Name to highlight, then click to select
Note: Vaccine Type must be selected prior to selecting the Vaccine Name

- Click the Lot Number field to highlight and enter the vaccine lot number.

![Add Stock](image1.png)

Click the Expiration Date field to highlight. Enter the vaccine expiration date in MMDDYYYY format (no spaces required) or use the calendar icon 🗓 to select the vaccine expiration date.

![Add Stock](image2.png)
To use the calendar, click on the icon 📅. The current date will be displayed.

- Use the forward or backward arrow keys to view each month.
  - Move cursor over the date to highlight. Click to select.
- To view the current year, click on the month.
  - Move the cursor over month to highlight, click to select
  - Move the cursor over date to highlight, click to select
- To view a decade, click on the year.
- Move the cursor over the year to highlight, click to select
- Move the cursor over the month to highlight, click to select
- Move the cursor over the day to highlight, click to select
- Click the **Quantity** field to highlight and enter the amount of vaccine to be added.

![Add Stock](image)

- Click the **Save** button to complete.
The newly added inventory is now visible by clicking the **Manage Inventory** tab

![Site Inventory](image)

**Figure 143 – Current Inventory**

**Admin**

**Change Site**

Upon log in, the users default site is the normal access point to OSIIS. The Change Site feature in allows users to change from their default site to another provider site within OSIIS.

From the **OSIIS Home Page**:

![OSIIS Home Page](image)

**Figure 144 - OSIIS - Admin Module**

1. Click the **Admin** tab then select **Change Sites**
2. The **Change Site** screen allows users to select from a list of available OSIIS sites using the drop-down menu.

![Change Site Screen](image)

*Figure 145 – Change Site*

3. Click the down arrow ▼ to display all available sites:

![OSIIS Sites](image)

4. Use the vertical scroll bar to bring site name into viewing pane if needed. Hover the cursor over the site name to highlight and double click to select.
5. Click the **Change Site** button.
   - At the confirmation message window, select the **OK** button.

User will be directed to the **Home** screen. The newly selected Site’s name will appear in the bottom right corner.

6. User can now access patients, vaccine inventory relevant to the newly changed site.

*Note: Site change will remain active until user logs out of OSIIS.*
Manage Users

The Manage Users tab provides the capability to add a new user to OSIIS. If user’s Last Name, First Name is added through Manage Users are not checked for possible duplication. Users to be added are distinguished from current OSIIS users through verification of a unique User Name therefore duplicate user names are not permitted. It is recommended that you search users before adding an individual as a user to be sure you are not creating duplicate users.

*Note: Current users needing access to additional sites beyond their default site must request access through OSIIS Administration. Current users should not be added to any additional site using Manage Users.

From the OSIIS Home Page

1. Click the Admin tab, scroll to the Manage Users tab to highlight and click to select.

2. At the Manage Users window, click the Add Users button to access the Add User screen.

Figure 148 - OSIIS Homepage-Admin

Figure 149 – Manage Users
3. Click to highlight the Last Name field. Enter the last name. <Tab> to next field.
4. Enter the user’s First Name. <Tab> to next field.
5. Enter the user’s Middle Name, if provided. <Tab> to next field.
6. Enter user’s Credentials from the drop-down list. <Tab> to next field.
7. Username will autocomplete based off of First and Last Names, and the system will automatically search to confirm the username does not already exist. You may enter a username manually in this field if desired.
8. Temporary Password is automatically Oklahoma#1
9. Select Status from the drop-down.
10. Enter Email Address.
11. Select desired User Roles by clicking in the box to the left of the choice in the User Roles list.
12. Click Save User to add user to the system.

**Site Search**

The Site Search provides the capability to search the OSIIS database for a particular site using any of the following site demographics:

- **Site ID** – System generated unique identification number assigned to each site upon creation through the OSIIS System
- **Legacy Provider ID** – Unique identification number assigned to sites through previous systems (State ID)
- **Site Name** – Name used when site was created in OSIIS
- **VFC PIN** – VFC Pin
- **Site Type** – Identifier used when site was created (i.e. CHD, daycare, school)
- **County** – County in which the site is located

To initiate a **Site Search** from the main menu toolbar:

1. Click the **Admin** tab then select **Site Search**.
2. At the **Site Search** window, users choose the field(s) through which to conduct the site search.

![Site Search](image)

**Figure 151 – Site Search**

Using a **Site ID** number, a **Legacy Provider ID** number, or **VFC PIN** number will return either a single result or no match found. Results for searches using these demographics are generated on an exact match to the character string entered (preceding zeroes are not used). Partial ID number matches are not returned. Results from the search are listed on the **Site Search Results** screen. Users have the capability to view the **Site Profile** from this screen using the **View** icon.

If no match is found, users will be notified at the top, right corner of the screen that no results were found.

**Your search returned 0 results**

To initiate a **Site Search**:

1. Enter the **Site ID** and click the **Search** button.
2. The results are displayed in the **Site Search Results** screen.
3. To return to the Site Search window, click the **New Search** button.

To search using the **Legacy Provider ID**:

Enter the **Legacy Provider ID** and select the **Search** button.
To search using the VFC PIN:

Enter the VFC PIN number in the required field, then click the Search button.

The Site Name, Site Type and County fields can be used individually or collectively to locate a particular site.
A **Site Name** search matches results to the character string entered. Any **Site Name** containing the character string is considered a possible match, resulting in several pages of site names being returned.

For example:

- Enter the character string ‘*Mer*’ in the **Site Name** field and click the **Search** button.

![Site Search](image)

- Results are listed from numerous Site Names, all containing the character string ‘*Mer*’

<table>
<thead>
<tr>
<th>SiteID</th>
<th>Site Name</th>
<th>Site Type</th>
<th>VFCPIN</th>
<th>Active?</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>297</td>
<td>ALEXANDER ELEMENTARY-COMMERCE</td>
<td>School</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>335</td>
<td>ALLEN WORKS OCCUPATIONAL HEALTH CENTER</td>
<td>Private</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>536</td>
<td>BOO HERS KIDS CLUB</td>
<td>School</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>641</td>
<td>BYNG PUBLIC SCHOOL-HOMETE ELEM</td>
<td>School</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>658</td>
<td>CAMERON PUBLIC SCHOOL</td>
<td>School</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>659</td>
<td>CAMERON UNIVERSITY STUDENT WELLNESS CENTER</td>
<td>School</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>203</td>
<td>CCHDCC EMERSON CLINIC</td>
<td>CHD</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>869</td>
<td>CHO EMERGENCY ROOM</td>
<td>Hospital-Private</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>931</td>
<td>CHRIST THE REDEEMER EARLY CHILDHOOD CENTER</td>
<td>Child Care</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>1014</td>
<td>CONGRESS HIGH SCHOOL</td>
<td>School</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>

*Figure 153 – Site search*
To decrease the number of possible matches, use as many characters within the site name as known and multiple site demographics from the Site Search screen

1. Enter the character string *Mercy H* in the Site Name field
2. Click the Site Type field. Type the letter ‘p’ to truncate Site Type list. Click to highlight Private

![Site Type:]

3. Click the County field. Type the letter ‘o’ to truncate the County list. Click to highlight OKLAHOMA

![County:]

4. Click the Search button to display the results

![Site Search]

Figure 154 – Site Search

The Site Search Results are more manageable:
User Search

The User Search provides the capability to complete a system-wide OSIIS user search. To concentrate your search criteria to a specific site, use the Manage Users option.

Immunize. Save Lives.

The Oklahoma State Immunization Information System (OSIIS) is a confidential, comprehensive database of immunizations administered to Oklahomans by participating providers. The goal of OSIIS is to reduce vaccine-preventable disease by supporting timely and complete immunizations. By working together to immunize all Oklahomans, we can save lives.

Contact Information

- OSDH Website
- Immunization Service Website
- 1000 N.E., 10th Street
- Oklahoma City, OK 73117-1299
- Phone: (405) 271-9444
- Fax: (405) 271-5609
- Email: osishelp@health.ok.gov
- FAQ: Frequently asked Questions

Site:

MARISA'S CLINIC

To Initiate a User Search from the OSIIS Toolbar, Click the Admin tab and select User Search from the drop-down:
The **User Name** is a unique character set within the OSIIS database and when used as a search parameter, it will return a single user record.

1. Enter the **User Name** and select the **Search** button.

2. The **User Search Results** window will display the correct OSIIS User.

Conducting a search using only the users **First Name** or **Last Name** can result in multi-record results since any record matching the character set entered will be returned.

For example, searching using the **First Name** - *Amy* resulted in all users with first names containing the characters set *Amy*. This search resulted in five (5) pages of user records.
Using as many characters as possible and using both the Last Name field and First Name field greatly reduces the number of returned results.

The number of records found matching a Last Name with the character M and First Name with characters Amy is ten (10).
Clicking the View icon allows the User Profile for that patient to be displayed.

Select the Back button or the browser window back arrow to return to the most recently generated search results.

To begin a new search, click the New Search button, or select Admin → User Search from the OSIS toolbar.
If the user search is unable to locate any matching records, a message indicating zero results is briefly scrolled onto the top, right corner of the screen.

**Reports**

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Providers Report</td>
<td>• The purpose of this report is to show the total number of active OSIIS providers by site type and access level (Full Service or View Only).&lt;br&gt;• There are no parameters needed for this report.</td>
</tr>
<tr>
<td>Clinic Volume Assessment Report</td>
<td>• The purpose of this report is to show the number of clients seen and immunizations given for 3 different age groups, broken down by who gave the immunizations.&lt;br&gt;• The parameters are set by the end user and there is no limit to the number of months the report can be run.&lt;br&gt;• The report shows the name listed as “Given By” in OSIIS, the number of distinct clients seen as well as the number of immunizations given for 3 age groups (0-5 years of age, 6-18 years of age, and 19 years of age and over).</td>
</tr>
<tr>
<td>CoCASA Text File Generator</td>
<td>• The purpose of this report is to compile a report from OSIIS of patients seen at the clinic from the selected age cohort (months or years). This information can then be uploaded into the Comprehensive Clinic Assessment Software Application, CoCASA, developed by the CDC as a tool for assessing immunization coverage rates within a provider clinic. It is designed to be used in conjunction with the Assessment, Feedback, Incentives, and eXchange (AFIX) Program.&lt;br&gt;• After data is imported into CoCASA, data analysis capabilities can be utilized for coverage assessment purposes providing a variety of different reports that can be utilized to pinpoint areas of strength and areas requiring improvement for a provider/clinic.&lt;br&gt;• Reports available in CoCASA include: adolescent coverage, invalid dose, missed opportunities, need one dose, diagnostic childhood report, etc.</td>
</tr>
<tr>
<td>Daily Possible Duplicate by Site</td>
<td></td>
</tr>
<tr>
<td>---------------------------------</td>
<td></td>
</tr>
<tr>
<td>• The purpose of this report is to show records of possible duplicates in OSIIS for each provider/clinic. This will aid in training data entry clerks and reduce the number of duplicate records entered into OSIIS.</td>
<td></td>
</tr>
<tr>
<td>• There are no parameters needed for this report.</td>
<td></td>
</tr>
<tr>
<td>• The report shows the demographics ID, Last Name, First Name, DOB, Sex, Mother’s Maiden Name, Guardian’s Last Name, and Patient’s Mailing Address.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Doses Administered</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The purpose of this report is to show the number of doses administered of each vaccine type within the date parameters for each funding source available for the clinic/provider.</td>
</tr>
<tr>
<td>• The funding sources available for the report will be based on the types of funding sources listed in inventory for each clinic/provider. County Health Departments will be able to run reports for state funded vaccine as well as locally purchased vaccine.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Find Patient by Lot Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The purpose of this report is to be able to list the patients of the clinic that have received a particular lot number within the date range entered by the end user.</td>
</tr>
<tr>
<td>• Parameters that can be entered by the end user include the start and end date for the report as well as the lot number in question.</td>
</tr>
<tr>
<td>• The report will list the patient’s last name, first name, middle, birth date, vaccine name, given date, lot number, and given by information.</td>
</tr>
<tr>
<td>• The report will also count the number of doses of that lot number given within the entered time frame.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Idle Sites</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The purpose of this report is to list the providers that have had no data entry into OSIIS for 30 or more days.</td>
</tr>
<tr>
<td>• This report assists VFC and OSIIS staff with identifying those providers that may no longer need access to OSIIS.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Immunization Activity – Time Range 2 Months</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The purpose of this report is to list all immunizations entered by a provider within the specified date range (not to exceed 2 months), using the +Add Immunization feature. This report does not include any shots recorded as a history shot.</td>
</tr>
<tr>
<td>Report Type</td>
</tr>
<tr>
<td>-----------------------------</td>
</tr>
<tr>
<td>This report includes patient identifying information, vaccine type, lot number, vaccinator, dose number, and VFC eligibility.</td>
</tr>
</tbody>
</table>
| Inactive Sites              | The purpose of this report is to list the sites that have been marked as “Inactive” in OSIIS.  
|                             | There are no parameters needed for this report. This report should be an Admin only report.                                               |
| Invalid Doses               | The purpose of this report is to show the provider a list of invalid doses given at the clinic within the selected time frame.  
|                             | The report will show the last name, first name, date of birth, given date, given by, vaccine name, series name, and lot number of each vaccine that is considered by OSIIS to be an invalid dose based on the forecaster.  
|                             | The forecaster is programmed with the ACIP recommended schedule for each vaccine series.                                                      |
| Inventory Transactions      | The purpose of this report is to provide a list of all inventory transactions for the provider within a specific date range.  
|                             | The report shows the vaccine name, transaction date, type of transaction, quantity, lot number, vendor, reason for the adjustment, comment, and entered by which OSIIS user.  
|                             | The comment field will contain the receiving provider information if the vaccine has been transferred to another provider.                   |
| Missed Opportunities        | The purpose of this report is to provide a list of patients that have been seen for immunizations in the clinic/provider’s office but did not receive all immunizations due or past due.  
|                             | Report parameters include patient age range of <3 years of age or <6 years of age, start date, and end date.  
|                             | The report cannot be run for more than 3 months at a time.  
|                             | The report includes given by, last name, first name, middle name, dob, given date, immunizations, missed immunizations, and patient status.       |
| Monthly Recall – By Site    | The purpose of this report is to provide a patient recall list for the site for patients due or past due for immunizations.               |
| **Outstanding Vaccine Shipments** | • The purpose of this report is to list providers who have received a vaccine shipment that has not been received into inventory.  
• This report is under construction.  
• Currently the report shows the # of providers, VFC Pin, provider name, provider ID, and order date.  
• It is being revised to include more search parameters such as shipping frequency. |
| **Patient Status Report** | • The purpose of this report is to list patients last seen at the clinic who have a status of “Inactive” or “Bad Address” in OSIIS.  
• The report lists patient ID, last, first, middle name, dob, address, phone, mother’s first name, father’s first name, and patient status. |
| **Required Documentation Record Review** | • The purpose of this report is to provide a random list of thirty patient records seen at the clinic. This report is run as part of the Compliance Site Visit.  
• The report shows the number of records; last and first name; birth date, vaccine name, given date, vendor name, lot number, immunization site, given by and VFC eligibility entered into OSIIS.  
• The report is used to ensure that patient eligibility is documented appropriately. |
| **Site Immunizations by Vaccines** | • The purpose of this report is to list immunizations given at a site by vaccine type.  
• The parameters for this report are vaccine type, start date, and end date.  
• The report lists last name, first name, given date, given by, history, change date, change user. |
| **Site Vaccine Inventory** | • The purpose of this report is to provide a printable list of all vaccines currently in a provider’s inventory.  
• The report lists the funding source, vaccine description, site qty, expiration date, lot number, state qty, ndc number, unit cost, create date, and item ID. |
| **Student Immunization Report** | - The report will also show vaccines that have expired in red and vaccines expiring within 30 days in orange.  
- The purpose of this report is to provide schools with a list of students that have been “claimed” by the school that are due/past due for immunizations and what immunizations are due or past due.  
- The report lists the last name, first name, dob, vaccine, and status.  
- The report also lists the total of each vaccine type needed by students at the school. |
| **Vaccine About to Expire** | - The purpose of this report is to list the providers with 20 doses or greater of a particular vaccine that will expire within the date range entered.  
- The date range entered should be future dates ranging 30 days from the current date.  
- The report lists the number of providers listed, VFC pin, provider name, ID, vaccine name, lot number, qty on hand, and expiration date. |
| **Vaccine Adjust Inventory Audit** | - The purpose of this report is to list the providers who have adjusted over 20 doses of a particular vaccine out of inventory.  
- The report lists the # of providers, VFC Pin, provider name, ID, vaccine name, qty, transaction date and time, comments, and adjustment description. |
| **Vaccine Inventory Cost** | - The purpose of this report is to list the cost of inventory sent to the provider within the entered date range.  
- The report lists the vaccine name, doses sent, transferred, and total received, cost both average per dose and total cost of each vaccine and a total cost for all vaccines. |
| **VFC Eligibility Status** | - The purpose of this report is to list the VFC Eligibility Status of patients seen at this clinic within the entered date range.  
- The report lists the VFC status and distinct clients by age: <1 year, 1 to 6 years, and 7 to 18 years. |
Notifications

Please refer to the OSIIS Homepage for a complete explanation of OSIIS system-generated notifications.

OSIIS Notifications Icon

Left click on icon to access message window.

Advises users of number of pending notifications using four icons:
- System
- Web User
- Site
- Shipping

User

User Profile

To view the User Profile, on the toolbar, click the User Tab, then click on the name shown at the top of the menu. The OSIIS User Profile screen will be displayed.
The **User Profile** screen serves several purposes. It provides administrative information on the current user including:

- **User Status** -
- **First Login Date** - First date user logged into OSIISnet
- **Last Login Date** – Last date user logged into OSIISnet
- **Username** - Name created for OSIISnet sign in
- **Login Site** - Default site user accesses when logging into OSIISnet
- **Phone Number**
- **Access Level**
- **Domain**
- **Password Expires (days)**
The **User Profile** screen also provides a snapshot of recent activities an OSIIS user performed within the last 30 days. These activities include:

- **Successful Logins** and **Unsuccessful Logins** – number of times a user has logged into OSIIS
- **Patients Searches** – number of patient searches completed
- **Demographics Activity** – number of patients added to the OSIIS database
- **Immunizations Activity** – number of immunization records updated
- **History Shots** – number of history shots updated
- **Progress Notes Activity** - number of progress notes added to patient records
- **Site Access** – determines the user’s capability to work within other OSIIS sites beyond the default site

Select the **Back** button or the browser window BACK arrow to return to OSIIS Homepage.

**Frequently Asked Questions (FAQ)**

From the OSIIS **Toolbar**, click the **User** tab then select **Frequently Asked Questions**
The FAQ screen is composed of questions commonly asked by OSIIS users and their appropriate responses.

Table: Frequently Asked Questions

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is OSIIS?</td>
<td></td>
</tr>
<tr>
<td>Why do we need OSIIS?</td>
<td></td>
</tr>
<tr>
<td>Who has access to OSIIS?</td>
<td></td>
</tr>
<tr>
<td>How do I get training for OSIIS?</td>
<td></td>
</tr>
<tr>
<td>How do I gain access to OSIIS?</td>
<td></td>
</tr>
<tr>
<td>I forgot my Password, now what?</td>
<td></td>
</tr>
<tr>
<td>How do I access OSIIS?</td>
<td></td>
</tr>
<tr>
<td>Training and Technical Questions</td>
<td></td>
</tr>
</tbody>
</table>

Figure 162 – Frequently Asked Questions

To access the response to a question:

Mouse over the question or the associated arrow the user needs a response from. The question and arrow will become underlined.

Click on either the underlined question or underlined arrow. The answer will appear below the question.

To close a FAQ, click again on either the underlined question or underlined arrow.

Multiple questions can be opened sequentially. Users are not required to close a question prior to opening another.

Print

Use this Icon to print the screen you are currently on.

Logout

Use this to log out of OSIIS at any time. Be sure to log out at the end of every session.