Oklahoma State Immunization Information System
OSIIS Web User Manual

[UPDATED August 27, 2018]

Table of Contents

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.

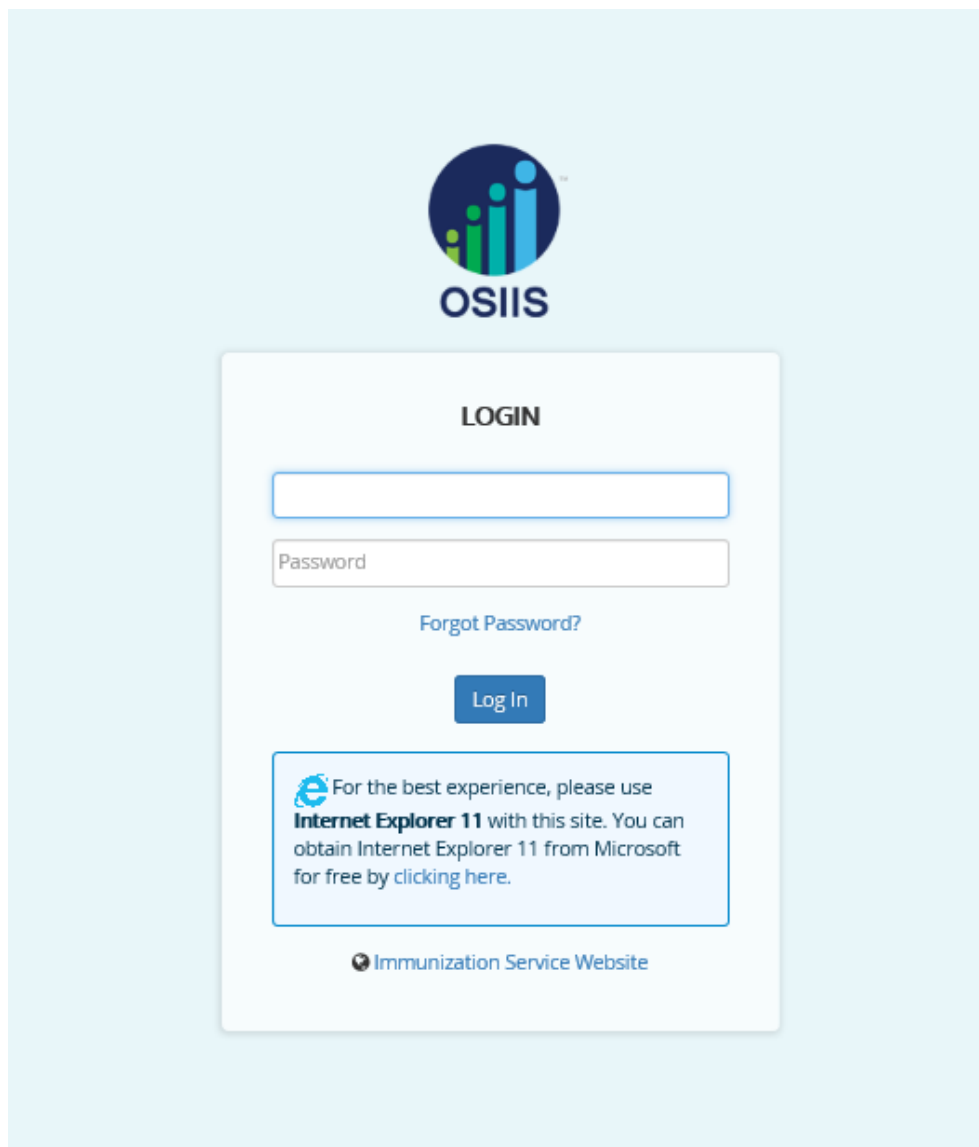At the **OSIIS Log In** screen, the **Username** field is highlighted in blue.

Figure 1 - OSIIS Login Screen

1. Enter your **Username** in the indicated field. Usernames *are not case sensitive.*
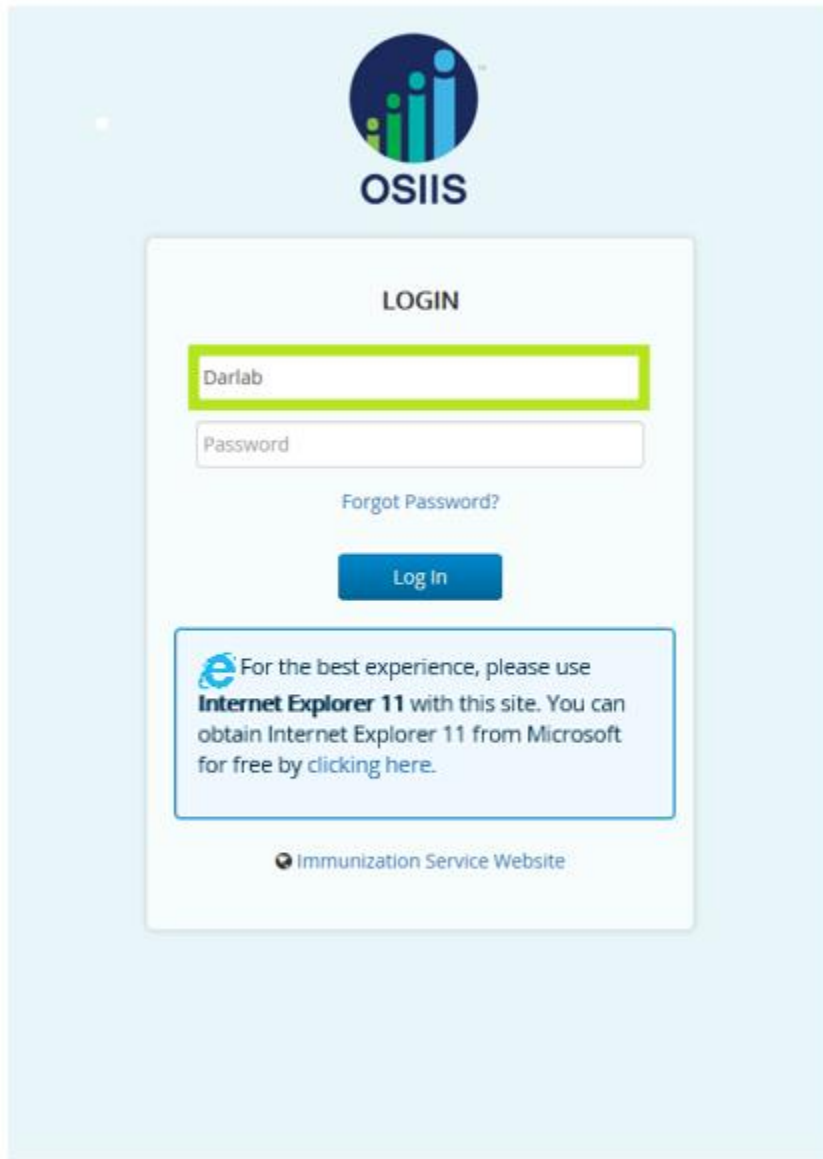
2. Press the keyboard ***<Tab>*** key or, click within the **Password** field to move the cursor.
3. Enter your **Password** *(case sensitive)*.
   a. First time OSIIS users will use the **default password** obtained through OSIIS System Administration to log in.

Note: *You can easily see or verify your password by clicking on the **View** icon* , *located to the right of the entry.*
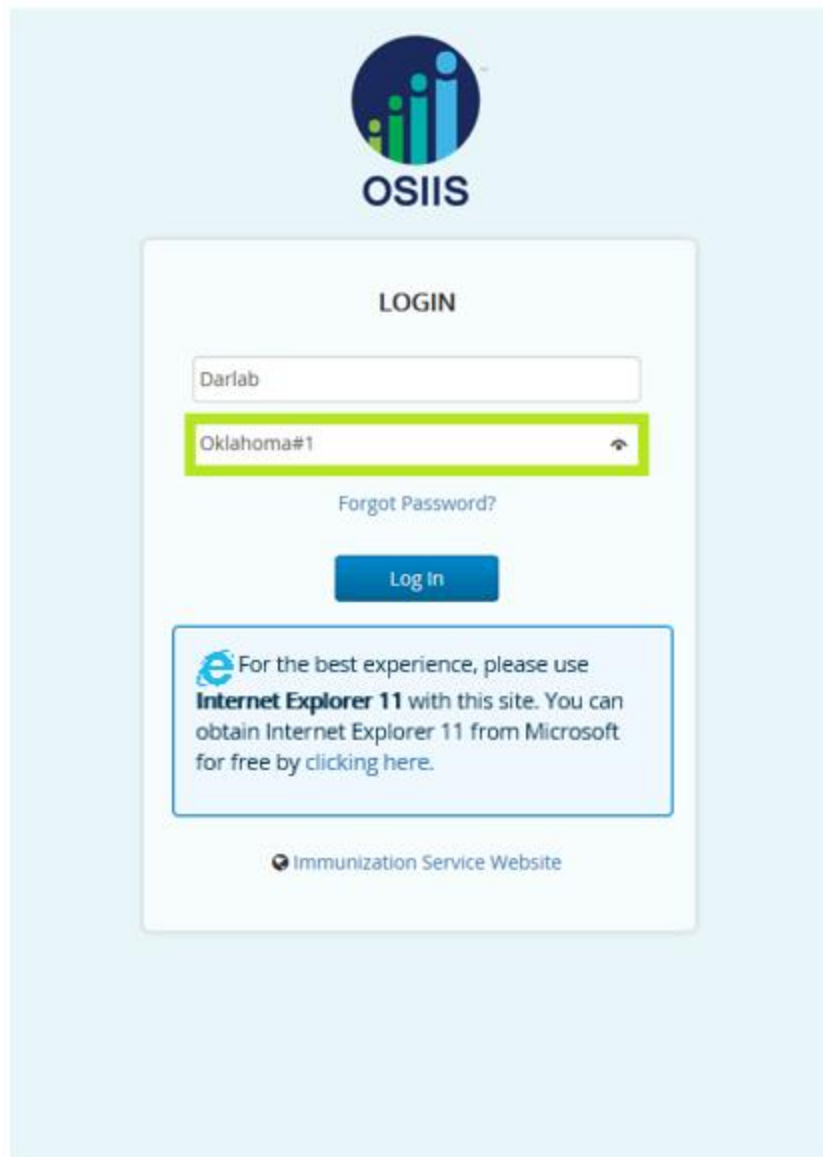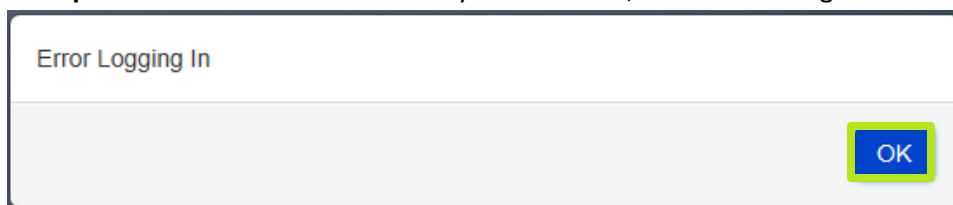
Figure 3 - Default Password

4. Click the **Log In** button [Log In] 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:

b. 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.

c. 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 pre-caution. The user will receive on-screen notification of their temporarily locked out status.
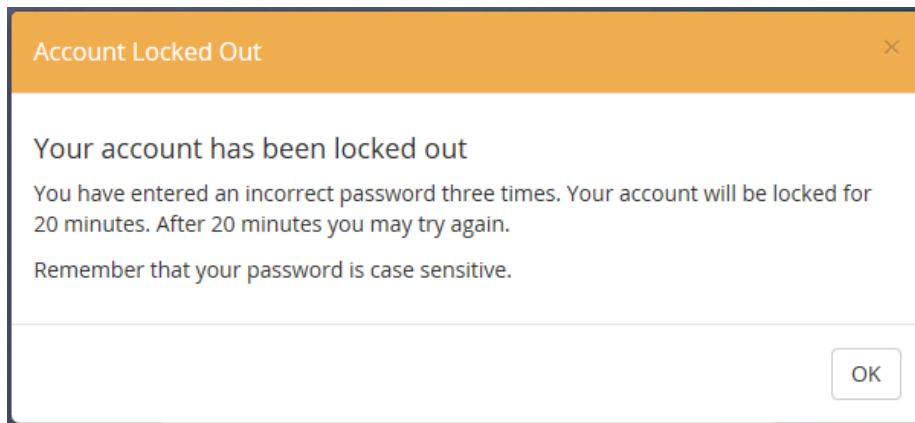
Figure 4 – Account Locked Message

      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).
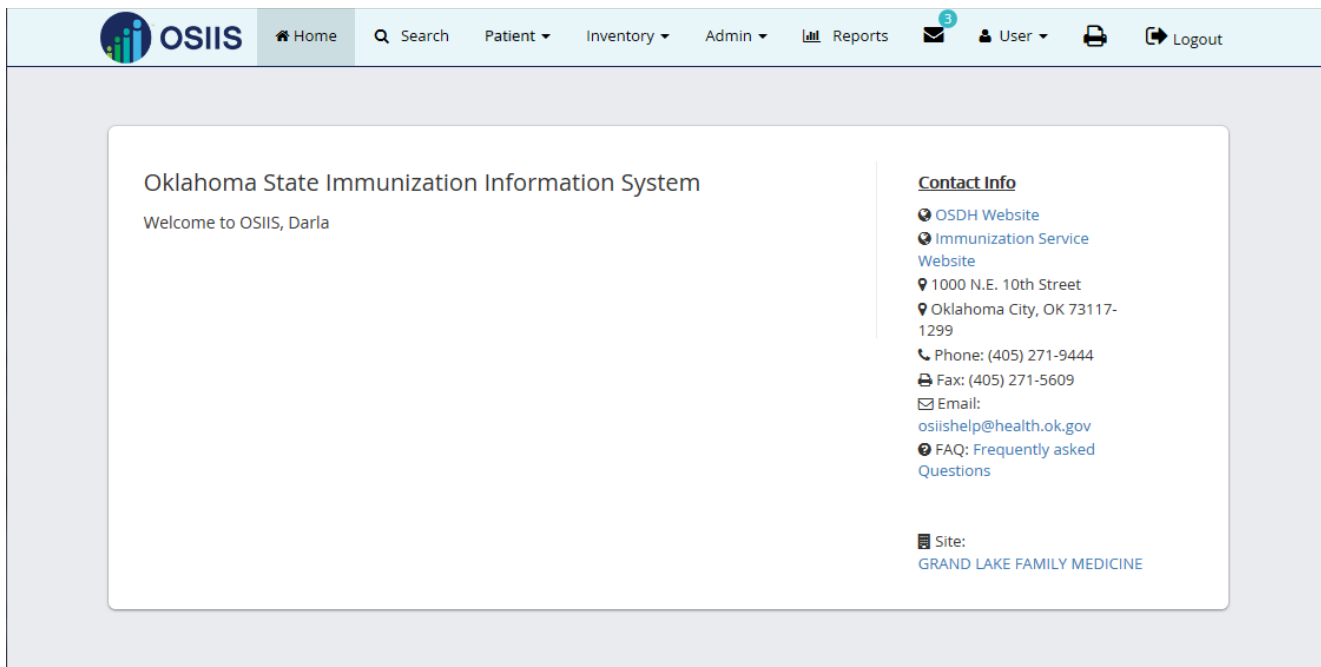

Figure 5 - OSIIS Homepage

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).
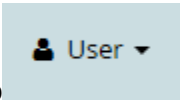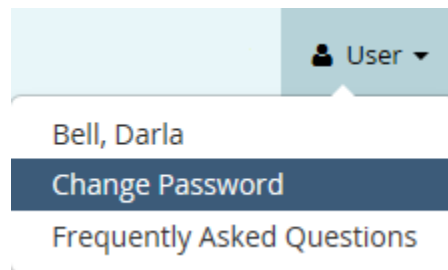
Change Password

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**)

Change OSIIS Password

DARLAJ

Current OSIIS Password

Enter your current OSIIS Password

new password

confirm new password

Cancel   🔒 Change Password

Figure 6- Change Password Screen

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

Oklahoma#1

Current OSIIS Password

Enter your current OSIIS Password

- 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.
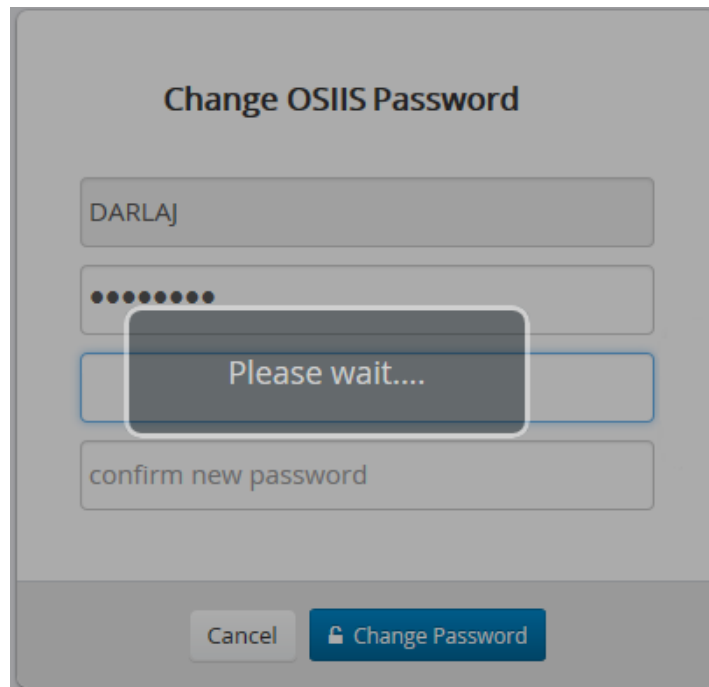
9

Figure 7 - Password Verification

*Note: *Pressing the **<Enter>** key has no effect on cursor movement*

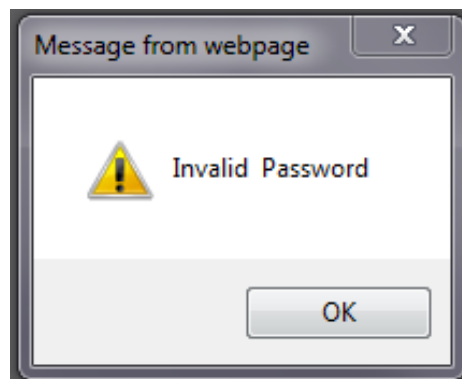- If the current password is entered incorrectly, an error message is displayed

Figure 8 - Password Invalid

- 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

Figure 9 - New Password Entry

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

Figure 10- Confirm New Password

- 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 ![Change Password] .

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.
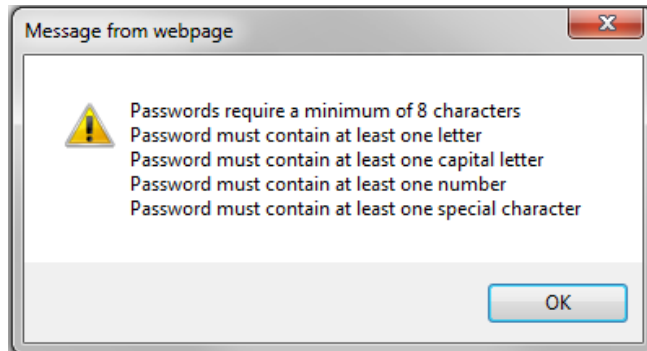
Figure 11- Password Criteria Error
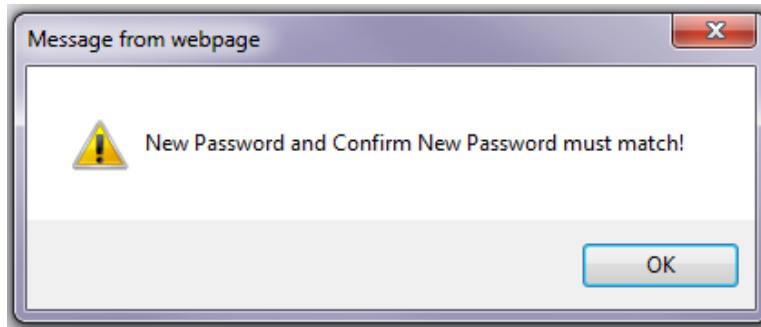
Figure 12- Password Confirmation Error

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:
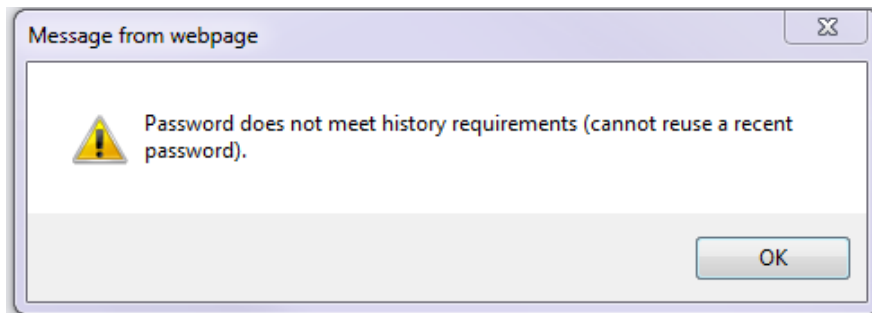

Figure 13-Password History Error

    a. Click the **OK** button to continue. Enter a **New Password** (Step 3).

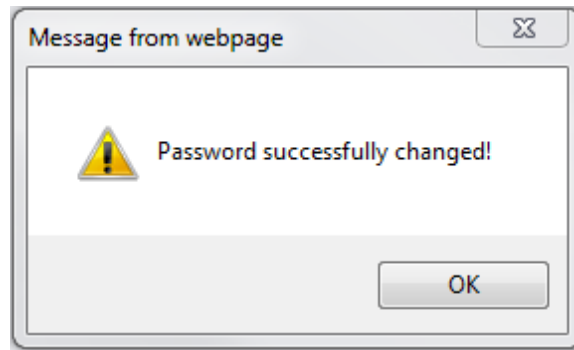8. Once completed, users are notified of a successful password change. Click **OK** to continue (Figure 14).

Figure 14-Password Changed Message

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.
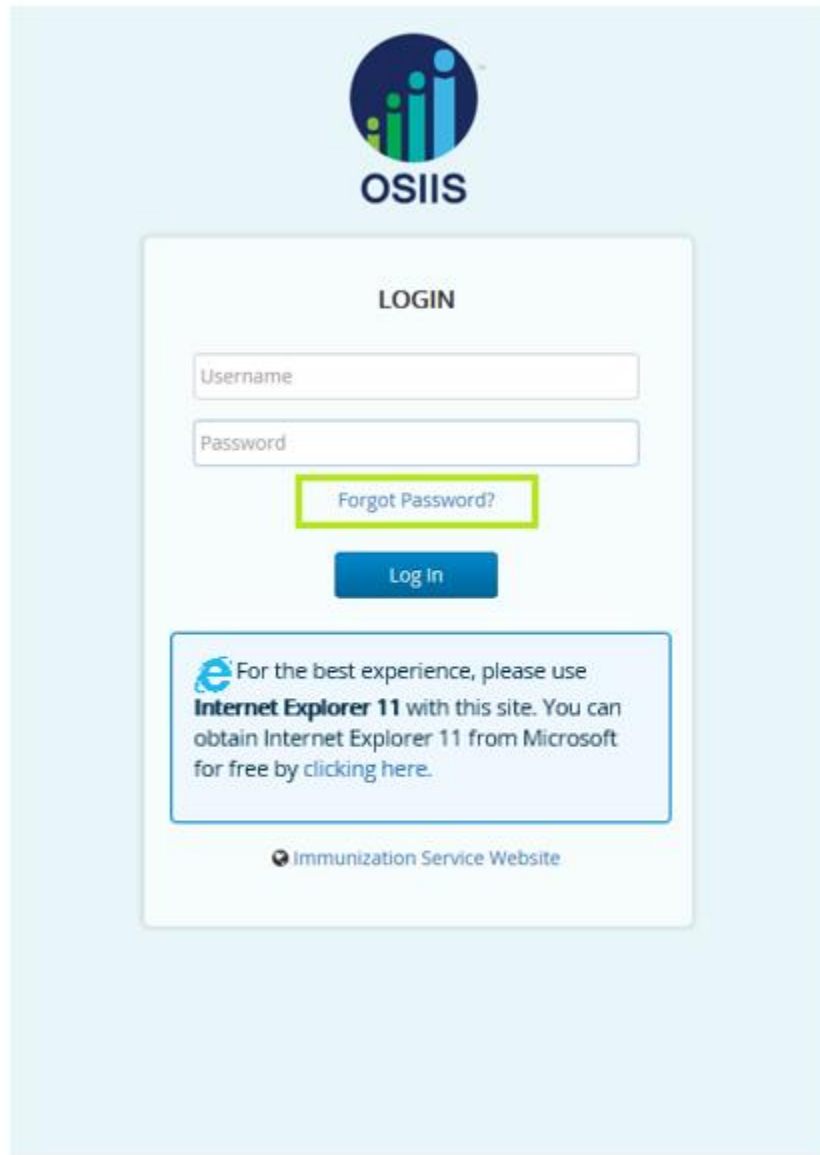
To use this feature, users must have a valid email address associated with their OSIIS user account. The email address may be added or updated by contacting your OSIIS Site Administrator or via the OSIIS Help Desk at (405) 271-7200 or by e-mailing osiishelp@health.ok.gov.

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

1. Click the **Forgot Password?** Hyperlink to access the **Reset Password** window (Figure 16).
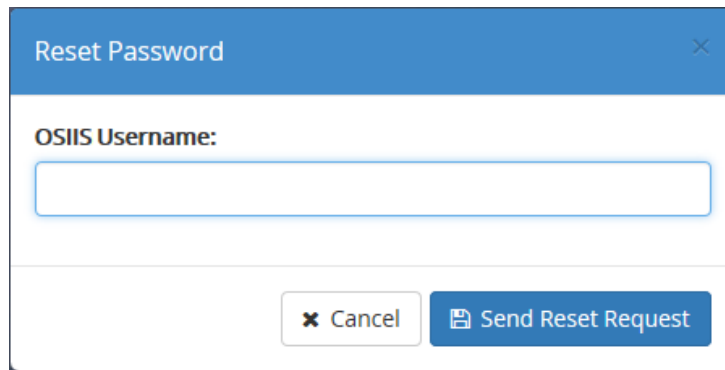
Figure 16- Reset Password Window

2. Enter the **OSIIS 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
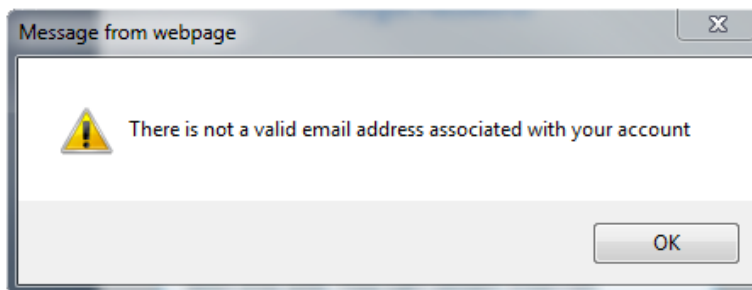
Figure 17- Email Address Error

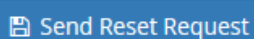***Note***: *If the user selects the **<Enter>** key instead of **Send Reset Request**, an on-screen notification is sent indicating the login credentials are invalid*
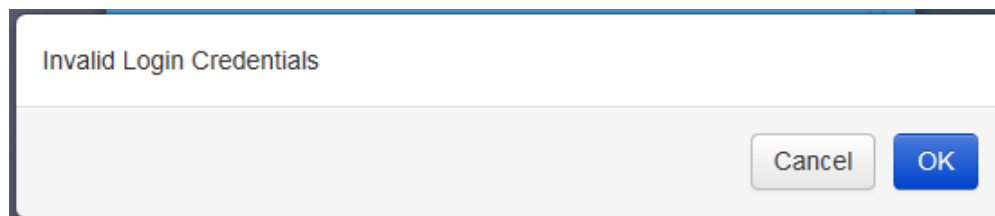
Figure 18- Invalid Login Message

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.
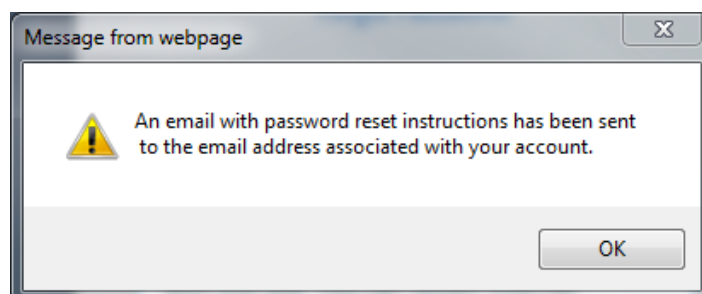
Figure 19- Reset Email Sent Message

15

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**
OSIIS Password Reset
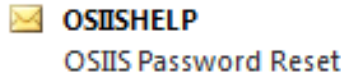
Figure 20 – OSIISHELP Password Reset Email

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

Hello   ,

You (or someone pretending to be you) requested that your OSIISnet password be reset.

If you didn't make this request then ignore this email, no changes have yet been made.

If you did make this request, then Click Here to reset your password.

Reset URL: http://web-mws20-340/OSIISNet_Stage/SSReset.aspx?resetid=b34b4bac065b40578ffc7ec6a4b6be2a

Figure 21- OSIIS Reset Password Link

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:*

Message from webpage

⚠ This Password Request has Expired
Please Try again.

OK
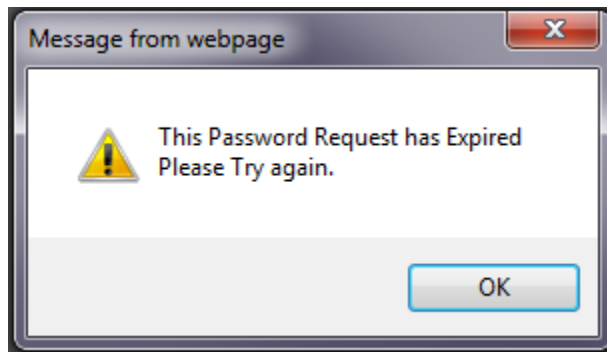
Figure 22- Password Reset Expired Error

7. At the **Reset OSIIS Password** screen, the **Username** field will be auto populated.
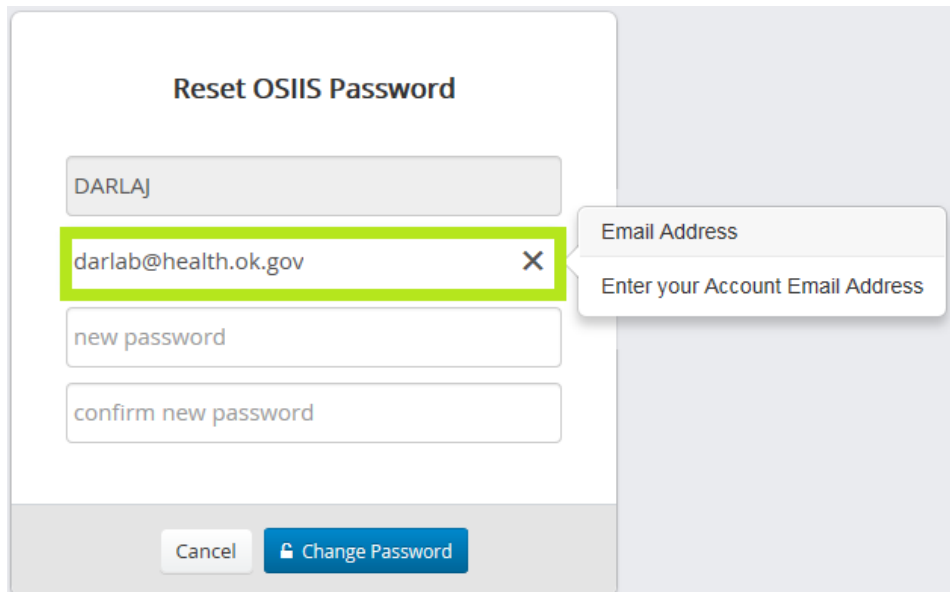
Figure 23- Reset OSIIS Password Screen

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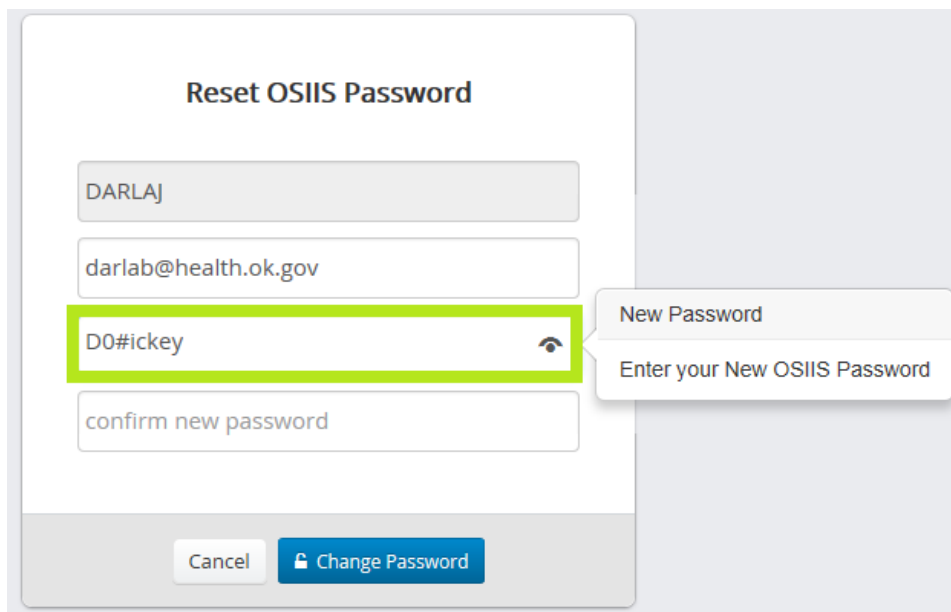
10. Verify the new password for rule adherence and accuracy using the **View** icon

Figure 24- Reset OSIIS New Password

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.

Figure 25- OSIIS Confirm New Password

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).
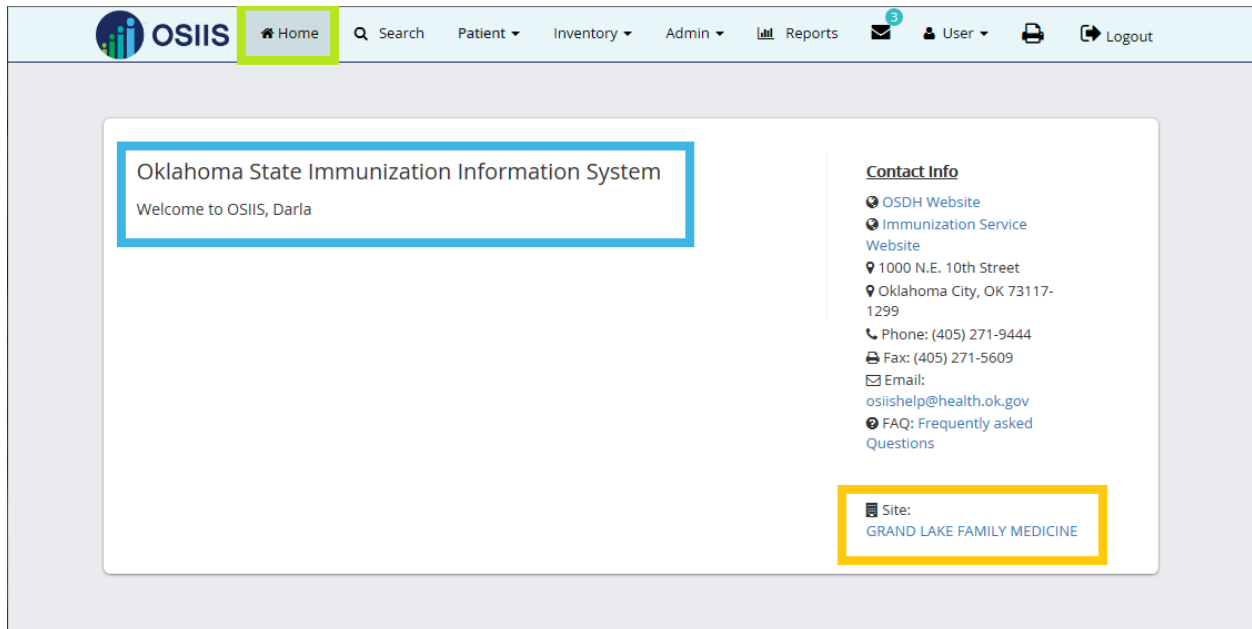
Figure 26- OSIIS Homepage- Default Site

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).
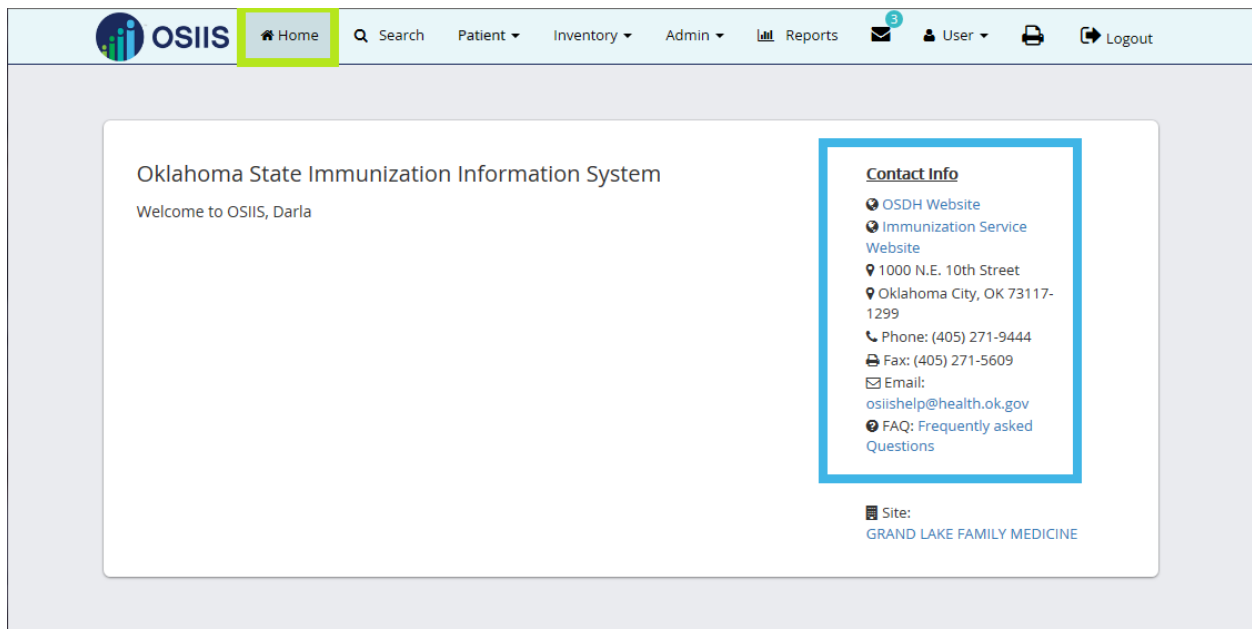
Figure 27 - OSIIS Homepage- Contact Information

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
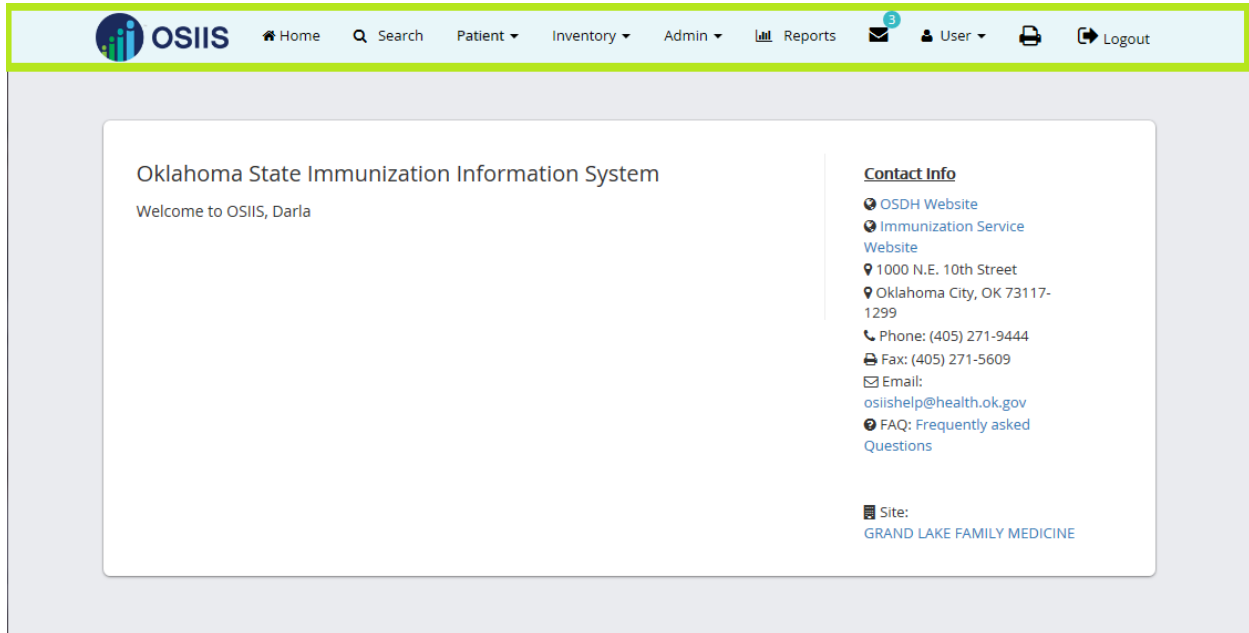
Figure 28 - OSIIS Homepage Toolbar

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

Figure 29 - Patient Menu

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).

Figure 30 - Minimized Homepage – Toolbar Icon

In the minimized format, the Toolbar functions are accessed by clicking the highlighted Toolbar icon (Figure 31).
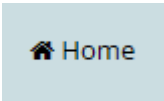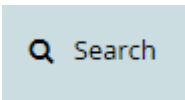
Figure 31 - Minimized Homepage Toolbar

- Table 1 lists each Icon/Feature and gives a brief description of its function on the OSIIS **Homepage**

Icon /Feature	How to access	Function
Home ⌂ Home	Left click on tab.	Directs user to OSIIS Homepage. Features hyperlinks in **Contact Info** to the following: **OSDH Website, Immunization Service Website, OSIIS Helpdesk email address, Frequently Asked Questions (FAQ)** and **Site Profile**. 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.
Minimized Toolbar Icon ☰	Left click on Homepage Toolbar icon. Select functions using left click.	Viewable when **OSIIS** viewing pane is less than 10.5 inches wide.
Search Q Search	Left click on button.	Initiates OSIIS patient search and allows access to **Search OSIIS Patients** window

Search OSIIS Patients

Demographics ID:	demographics id
	OR
Last Name:	last name
First Name:	first name
DOB:	mm-dd-yyyy
	OR
SSN:	#########
	OR
Phone:	##########
	OR
Street:	street address
Zip Code:	#########

⟳ Reset   ✗ Cancel   ◄» Search with Soundex   ⚲ Search

Demographics ID:

◄» Search with Soundex

Patient

Patient ▾

Add New Patient
Patient Summary
Demographics
Immunizations
History Shots
Progress Notes

Inventory

	___	System generated sequential identification number assigned to each **OSIIS** 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. Select functions using left click.	Drop-down menu enabling user to access patient specific functions within OSIIS **Add New Patient** to a site, view and edit **Patient Summary** data, **Demographics**, **Immunizations**, **History Shots** and **Progress Notes**.
	Left click on button. Select functions using left click.	Drop-down menu enabling users to access vaccine inventory specific functions within OSIIS **Receive Shipments**, **Inventory Management**, **Transfer Inventory**, **Vaccine Preferences**, **Vaccine Request** and **Add Stock**

Inventory ▾
- Receive Shipments
- Inventory Management
- Transfer Inventory
- Vaccine Preferences
- Vaccine Request
- Add Stock

Admin

Admin ▾
- Change Site
- Manage Users
- Site Search
- User Search

	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 Reports

Left click on tab. Select report to be generated from list provided. All-inclusive reports generally require a date range to collect data from. Site specific reports requirements vary according to report content.	Provides user access to generate 29 OSIIS reports; 11 all-inclusive site reports and 18 site specific reports

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
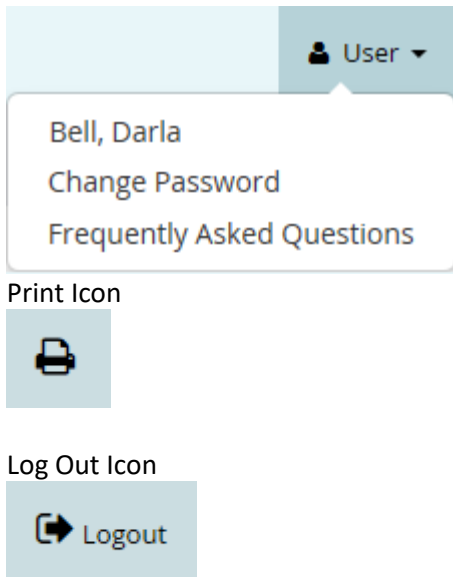
		User Profile and Frequently Asked Questions. Users can also Change Password.
Print Icon	Left click on tab	Allows user to print screen
Log Out Icon	Left click on tab	Logs user out of OSIIS

Figure 32- OSIIS Homepage Icons Functions

Search

The **Search** ![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**.
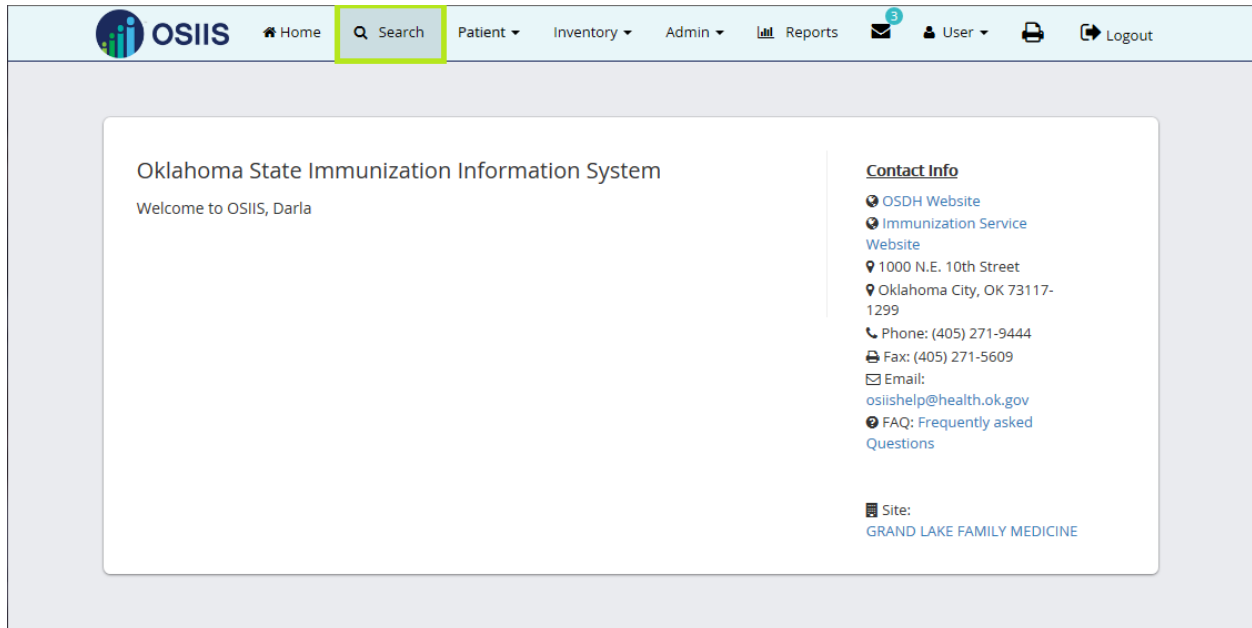
Figure 33 - OSIIS Homepage- Search Tab

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 ![Search] 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).
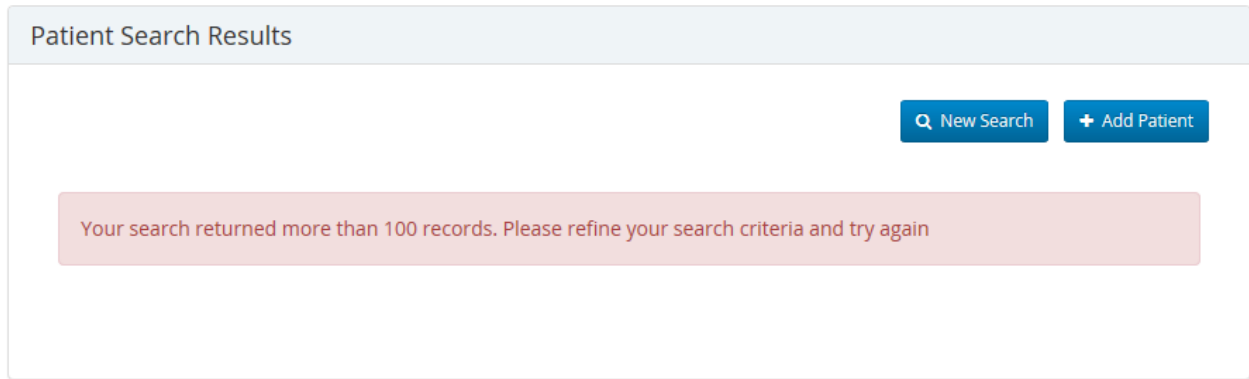
When only one matching record results from the search, the record is displayed on screen using the **Patient Summary** tab (Figure 35).

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).

Patient

👤 MITCHELL, DANAE, L	**DOB:** 2/8/1980	**Age:** 35 y 10 m 10 d	**Demographics ID:** 522042	🖨 Schedules	🖨 Shot Record

Summary Demographics Immunizations History Shots Progress Notes

Patient Summary

Last Update	
November 20th 2015, 5:40:16 pm	

Demographics ID	Last Name	First Name	Middle Name
522042	MITCHELL	DANAE	L

DOB		Status	
2/8/1980		Active	

Suffix	Gender	SSN	
	F	XXX-XX-8388	

Birth State	Language	Mother's Maiden Name
	English	

Race
White

County
OKLAHOMA

Comments
FILE CLOSED TO 4201 ON 1-18-09

Patient Addresses

Client Addresses

Street	City	State	Zip	Actions
8001 BLACKBIRD LN	EDMOND	OK	73034-9030	👁

Patient Guardians

Client Guardians

Last Name	First Name	Middle	Relation Type	Actions

Patient Contacts

Client Contacts

Priority	Contact Type	Contact Number	Actions
1	Cell Phone	4053141094	👁
2	Message Phone	4056580052	👁
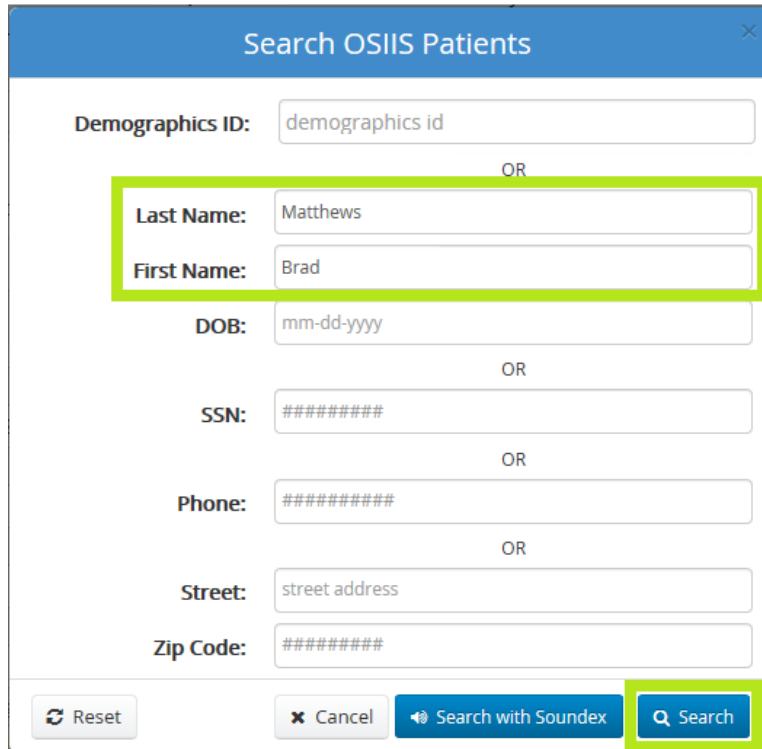
Figure 36 - Demographics ID Search Result

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)

Figure 37-Search OSIIS Patients - Last and First Name Only

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).

Figure 38 - Patient Results List - No DOB

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.
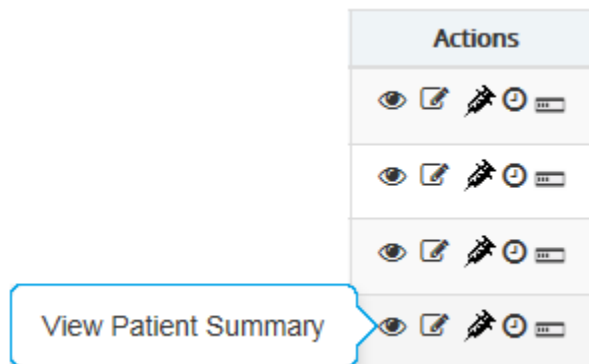
Figure 39 -View Patient Summary

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

Figure 40- Search OSIIS Patient with Soundex

In this example, results from the patient search generated three possible matches. The patient, Dan Quach's record is listed (Figure 41).

Figure 41 - Soundex Patient Results

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.

Figure 42 – Search OSIIS Patient- SSN

- 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).

Figure 43 - SSN Search Results

Note: The patient's entire SSN is viewable within the Demographics tab

Phone Number

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

- o Phone number is used for multiple related patients (family members)
- o 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).

Figure 44 - Search OSIIS Patient - Phone Number

- 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).

Figure 45 –Phone Number Search Result

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**)**

<div align="center">Figure 46 - Search OSIIS Patients - Street Address and Zip Code</div>

- Click the **Search** button [Search] or press the <**Enter**> key on the keyboard. The patient record matching the entered **Street Address** and **Zip Code** will be displayed.

Figure 47 – Street Address and Zip Code Search Results

- If no patient record matches the search criteria provided, the patient search results will indicate that no records were found (Figure 48).

Figure 48 – Search OSIIS Patients - Zero Results Found

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:
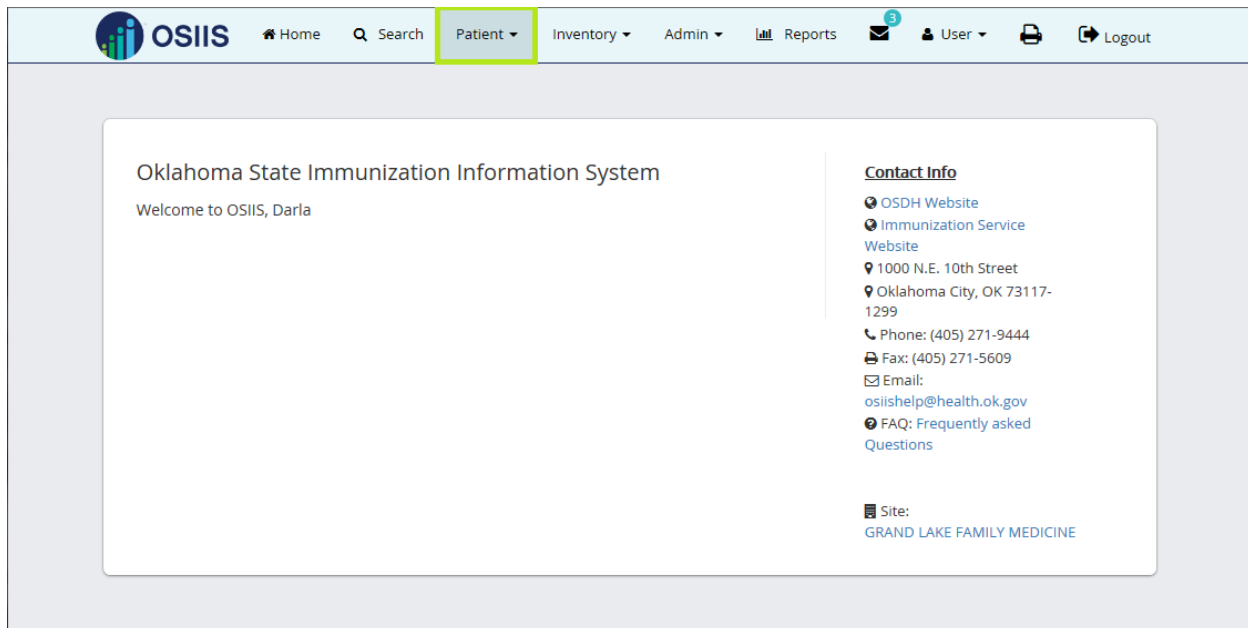
Figure 49 - OSIIS Homepage- Patient Tab

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**
  - o Enter patient's name and DOB as indicated. Proceed to **Step 3.**

Figure 50 - Patient Search-Last Name, First Name, DOB

  - o *or* **Social Security Number**
  - o Enter patient's SSN without dashes. Proceed to **Step 3.**

Figure 51 - Patient Search - SSN

or **Phone Number**

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

Figure 52 - Patient Search - Phone Number

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

Figure 53 - Patient Search - Street Address and Zip Code

3. Click the **Search** button [Q Search] .

- 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** [◀ 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).

Figure 54 – Search OSIIS Patients - Zero Results Found

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

41

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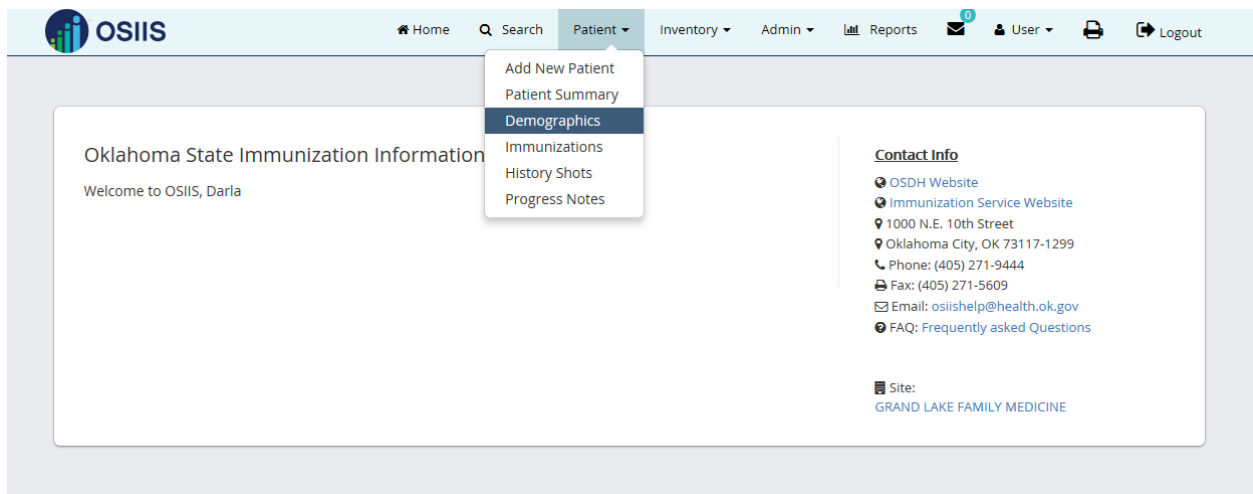
If the **Search** criteria used to locate a patient's record results in a single match, the **Demographics** tab is displayed (Figure 56).

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 .

Figure 32 -Multiple Results -Demographics 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).

Patient

| Summary | Demographics | Immunizations | History Shots | Progress Notes |

Patient Demographics

*- Required Field

Demographics ID: **Last Update:**

Last Name: *   **First Name: ***   **Middle Name: ***

[last name]   [first name]   [middle name]   ☐ No Middle Name

Suffix: **DOB: ***   **Gender: ***

[-Select- ▾]   [date of birth 🗓]   [-Select- ▾]   ☐ Deceased

Birth Country: *   **Birth State: ***   **SSN:**

[-Select- ▾]   [-Select- ▾]   [ssn]

Language: *   **Ethnicity: ***

[-Select- ▾]   ☐ Multiple Birth?   [-Select- ▾]

Registry Status: *   **Mothers Maiden Name: ***

[-Select- ▾]   [mothers maiden name]   ☐ Maiden Name Unknown

Race: *

☐ American Indian/Alaskan Native   ☐ Asian   ☐ Black/African American   ☐ White
☐ Native Hawaiian/Other Pacific Islander   ☐ Other

          Reminder/Recall:
☐ Race Was Not Self Declared   ☐ Foster Child   [-Select- ▾]

Street 1: *   **Street 2:**

[street 1]   [street 2]

City: *   **State: ***   **Zip: ***   **County:**

[city]   [-Select- ▾]   [zip]   [-Select- ▾]

          Birth Facility:
☐ Allow Contact   ☐ Bad Address   [birth facility]

Comments:

[Comments]

[⊘ Cancel] [💾 Save Patient]

Patient Contacts

Patient Guardians

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**
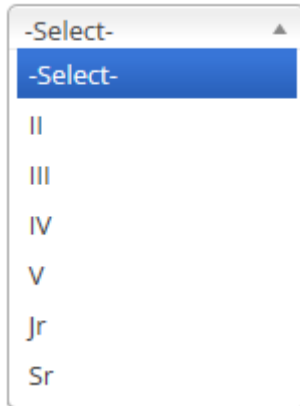
   Last Name: *   **First Name: ***   **Middle Name: ***

   [last name]   [first name]   [middle name]

   o If patient has no **Middle Name**, check box indicating ☑ No Middle Name

6. Add **Suffix**, if applicable
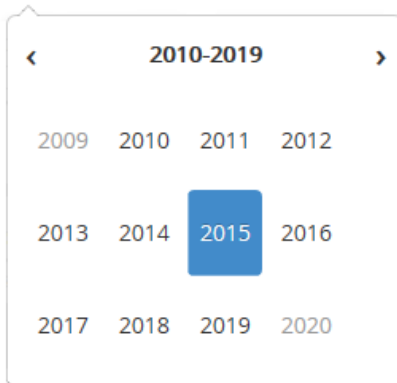
Suffix:

-Select-
-Select-
II
III
IV
V
Jr
Sr
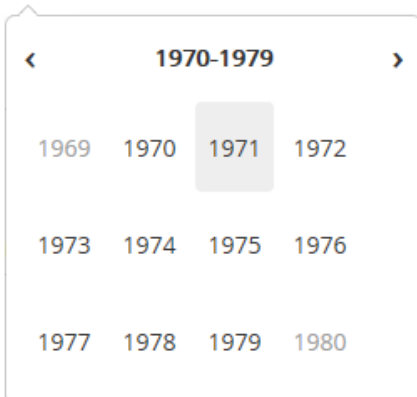
7. Enter the **Date of Birth** using format MMDDYYYY or,

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

‹	2010-2019		›
2009	2010	2011	2012
2013	2014	**2015**	2016
2017	2018	2019	2020

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

‹	1970-1979		›
1969	1970	1971	1972
1973	1974	1975	1976
1977	1978	1979	1980

   o   Click on birth month to select
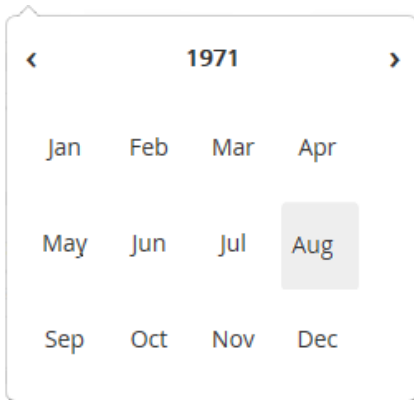
- o Click on patient birthday

- o Date is now entered in **DOB** field

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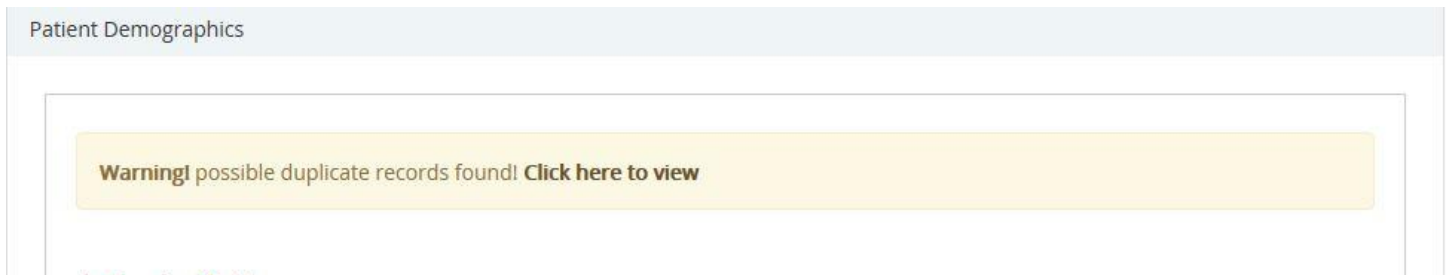
When user clicks on **Click here to view**, OSIIS lists all the possible duplicates based on the entered information. User can choose **Select Patient** from the listed recommendations if it is an exact match. Or user can click on **Close** to continue creating the new OSIIS record.

8. Select patient's **Gender**
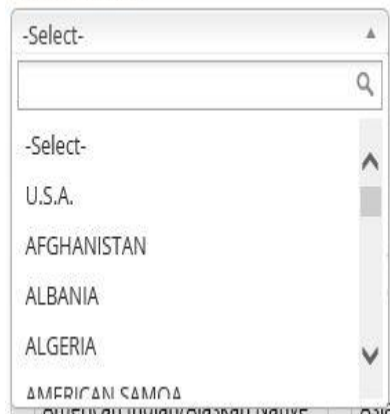
9. If patient is **Deceased**, check the box
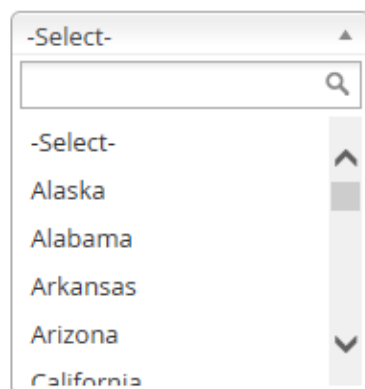
10. **Birth Country** can be easily located by typing one or two characters of the country name in the search field 🔍 .
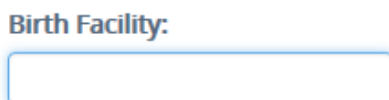Click to select from the options provided

Birth Country: *

-Select-

🔍

-Select-

U.S.A.

AFGHANISTAN

ALBANIA

ALGERIA

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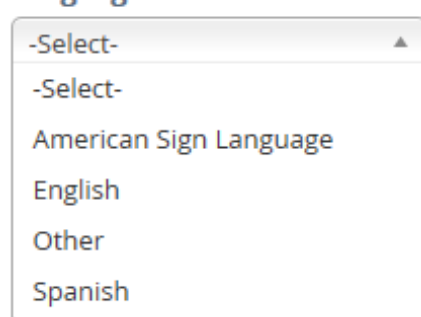
11. **Birth State** can be easily located by typing one or two characters of the state name in the search field 🔍 . Click to
select from the options provided

Birth State: *

-Select-

🔍

-Select-

Alaska

Alabama

Arkansas

Arizona

California
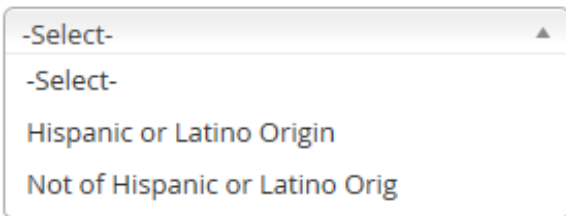
12. Add patient's **Social Security Number** (no dashes required), if available.
13. Select **Language** from drop-down menu.

Language: *

-Select-

-Select-

American Sign Language

English

Other

Spanish

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

☐ Multiple Birth?

15. Select **Ethnicity** from drop-down menu

Ethnicity: *

-Select-	▲
-Select-	
Hispanic or Latino Origin	
Not of Hispanic or Latino Orig	

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: *

-Select-	▲
-Select-	
Active	
Inactive	
Inactive - Lost to follow-up	
Inactive - Moved or gone elswhere	
Inactive - Permanently inactive	
Unknown	

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

☐ Maiden Name Unknown

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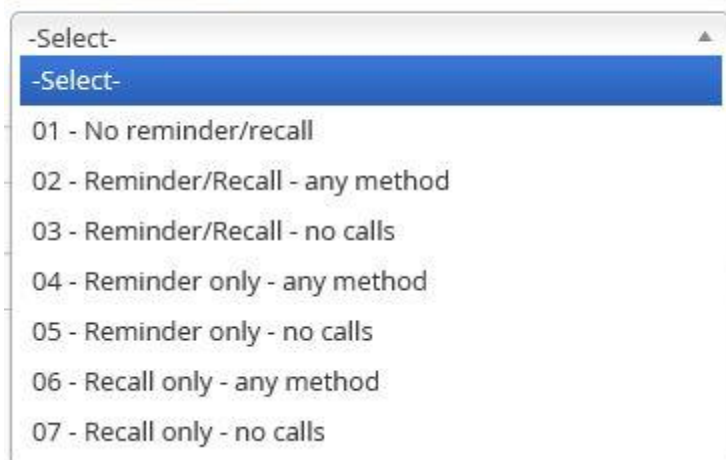
- o If patient's **Race Was Not Self-Declared**, check the applicable box (not required)

☐ Race Was Not Self Declared

19. If patient is a **Foster Child,** check box as appropriate ☐ Foster Child (not required)

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.

Reminder/Recall:
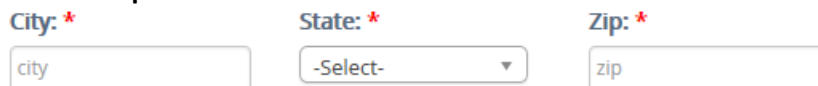
-Select-	▲
-Select-	
01 - No reminder/recall	
02 - Reminder/Recall - any method	
03 - Reminder/Recall - no calls	
04 - Reminder only - any method	
05 - Reminder only - no calls	
06 - Recall only - any method	
07 - Recall only - no calls	

21. Enter patient's address in **Street 1** field. If additional space needed, use **Street 2**

Street 1: *   Street 2:

[street 1]   [street 2]
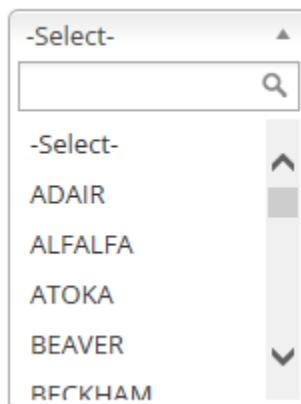
22. Enter **City** name, select **State** and **Zip Code**

City: *   State: *   Zip: *

[city]   [-Select- ▼]   [zip]

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

County:

-Select-	▲
[🔍]	
-Select-	^
ADAIR	
ALFALFA	
ATOKA	
BEAVER	∨
BECKHAM	

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

☐ Allow Contact   ☐ Bad Address

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

Birth Facility:

[   ]

26. Enter **Comments** if necessary, in field provided

Comments:

> Comments

Note: Patient Contacts or Patient Guardian are added once the patient has been successfully saved.

27. Click the **Save Patient** button [💾 Save Patient]
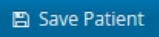
28. The system sends confirmation that the patient record was accepted and within the database:

> **Message from webpage**   [✕]
>
> ⚠️ Successfully Saved Patient Data
>
>   [OK]
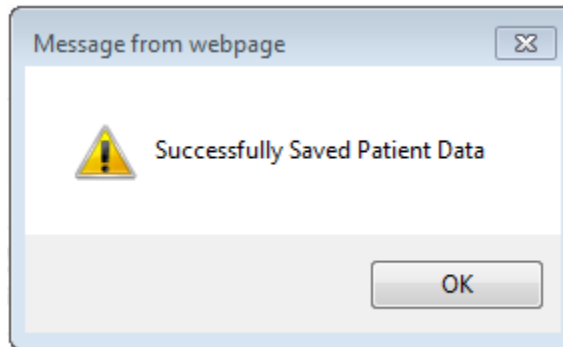
29. The new patient's data record with its newly assigned **Demographics ID** is now viewable (Figure 59).

Patient   ▲ THOMAS, TESTONE | DOB: 5/5/1903 | Age: 55 y 2 m 15 d | Demographics ID: 3645325 | 🖨 Schedules | 🖨 Shot Record

Summary   **Demographics**   Immunizations   History Shots   Progress Notes

Patient Demographics

*= Required Field

Demographics ID: 3645325   **Last Update:** July 20th 2018, 2:07:51 pm

Last Name: *	First Name: *	Middle Name: *	
THOMAS	TESTONE	middle name	☐ No Middle Name

Suffix	DOB: *	Gender: *	
-Select- ▾	5/5/1903 📅	Female ▾	☐ Deceased

Birth Country: *	Birth State: *	SSN:
U.S.A. ▾	Oklahoma ▾	ssn

Language: *		Ethnicity: *
English ▾	☐ Multiple Birth?	Unknown ▾

Registry Status: *	Mothers Maiden Name: *	
-Select- ▾	TEST	☐ Maiden Name Unknown

Race: *

☐ American Indian/Alaskan Native   ☑ Asian   ☐ Black/African American   ☐ White

☐ Native Hawaiian/Other Pacific Islander   ☐ Other

Reminder/Recall:

☐ Race Was Not Self Declared   ☐ Foster Child

02 - Reminder/Recall - any method ▾

Street 1: *	Street 2:
1000 NE 10TH ST	street 2

City: *	State: *	Zip: *	County:
OKLAHOMA CITY	Oklahoma ▾	73117	-Select- ▾

Birth Facility:

☐ Allow Contact   ☐ Bad Address   birth facility

Comments:

Comments

🚫 Cancel   💾 Save Patient

Patient Contacts

➕ Add Contact

Client Contact Numbers

Priority	Type	Name	Phone Number/Email	Extension	Allow Contact	Actions
1	Home Phone	Thomas Thomas	(405) 000-0000		✔	✎ 🗑

Patient Guardians

➕ Add Guardian

Client Contact Guardians

Last Name	First Name	Relation Type	Actions
THOMAS	TEST	Legal Guardian	✎ 🗑

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 [+ Add Contact] to open the **Add Patient Contact** window.
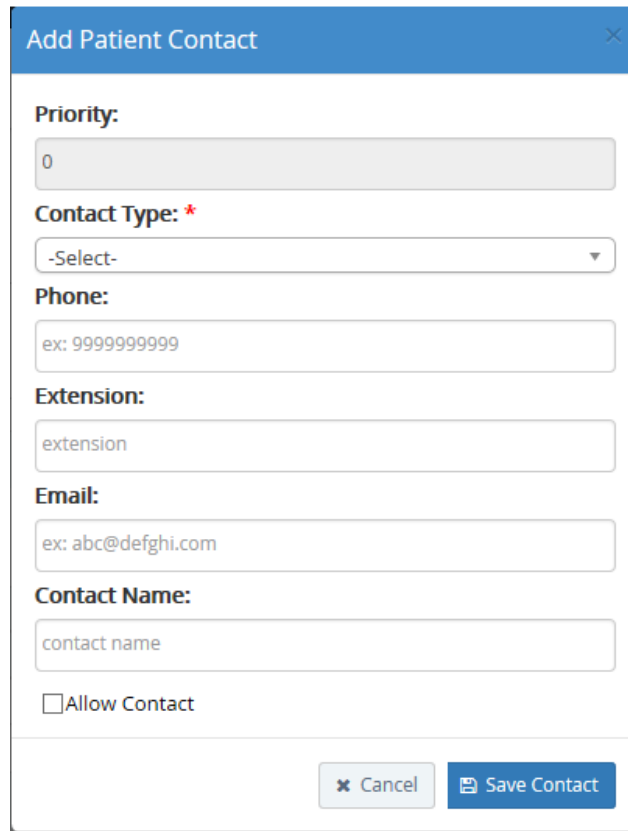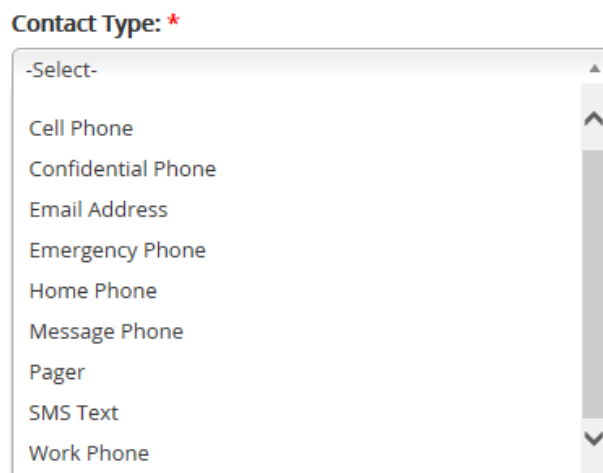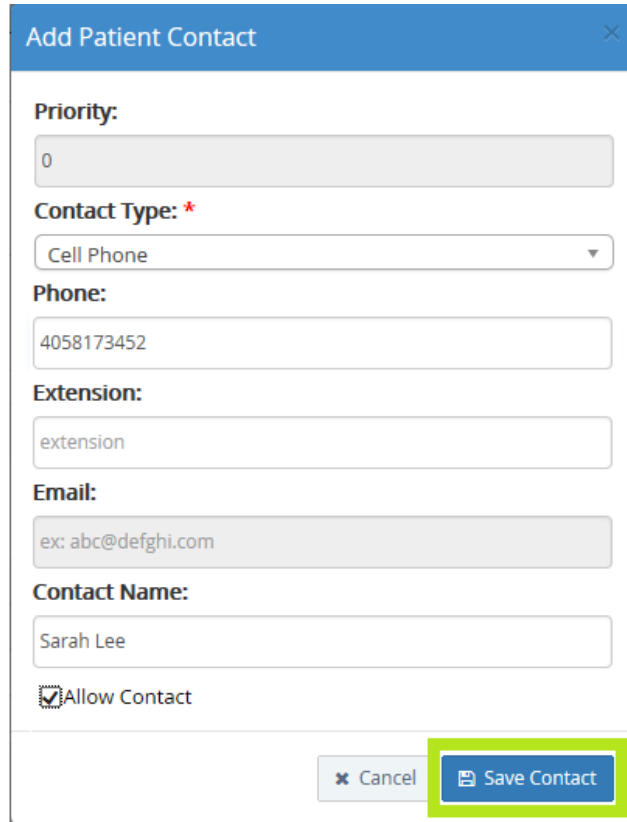
Figure 60 - Add Patient Contact

2. Highlight the **Contact Type** to be added from the drop-down menu and click to select.

53

Note: *Each contact type must be added separately. For example, if adding a phone number, only the phone field will be accessible:*

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 Guardian] .
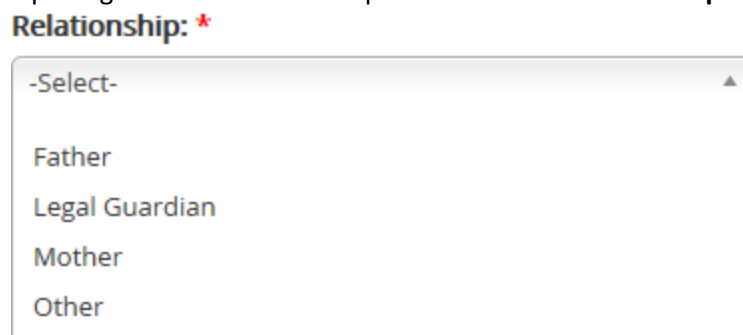
Figure 62 - Add Added Guardian
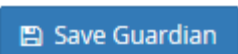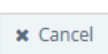
7. Select the type of relationship the guardian has with the patient from the **Relationship** menu.

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 ![Responsible For]
11. Click the **Save Guardian** button ![Save Guardian] to add the guardian to the patient's record. To cancel adding

    the guardian, click the **Cancel** button ![Cancel] .

Figure 63 – Add Patient Guardian

Both the newly added **Patient Contacts** and **Patient Guardians** are viewable on the Patient Summary tab (Figure 64).

Figure 64- Patient Contact and Guardian

To edit or delete a guardian, users must do so in **Patient Demographics** within the appropriate section using the **Edit** or **Delet**e icon within the **Actions** column (Figure 65).

Figure 65 - Edit/Delete Patient Contact or Guardian

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 f**rom the **OSIIS Homepage** screen:
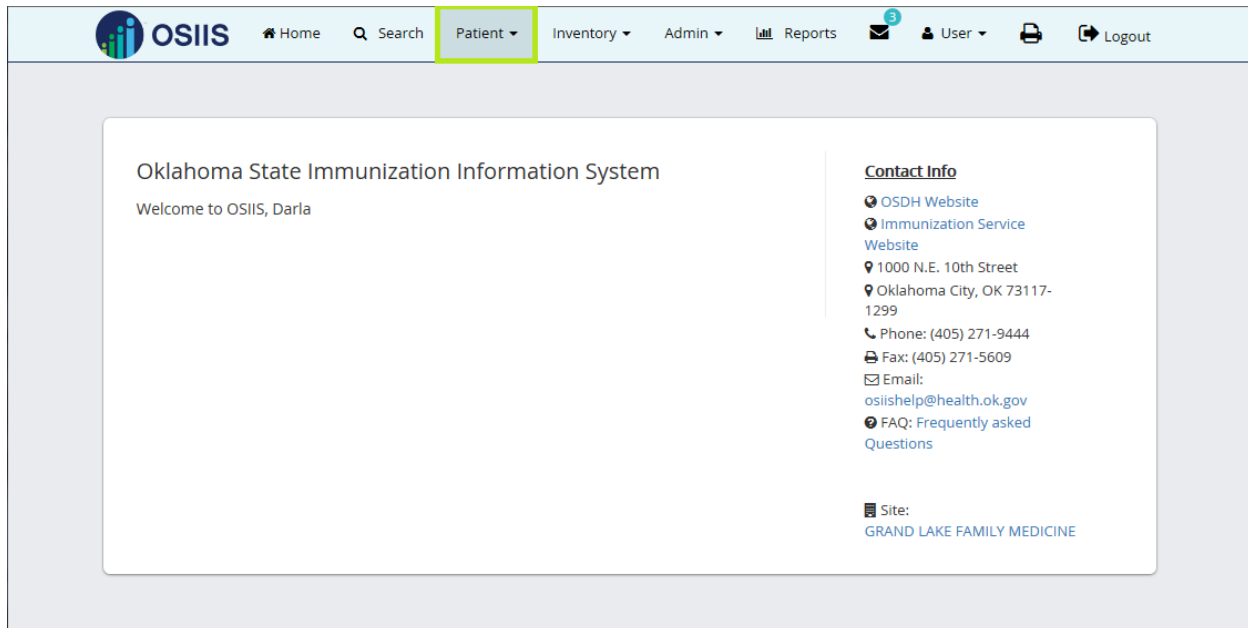
Figure 66 - OSIIS Homepage- Patient

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**
        - o   Enter patient's ID number. Proceed to **Step 7**.

- *or* **Last Name** and **First Name** and **Date of Birth**
  - o 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.**

Figure 69 - Patient Search - SSN

- *or* **Phone Number**
  - o Enter the patient's 10-digit phone number without spaces or special characters. Proceed to **Step 7**.

Figure 70 - Patient Search - Phone Number

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

60

Figure 71 - Patient Search - Street Address and Zip Code

3. Click the **Search** button [Q Search] .

- 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** [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)

Figure 72 Immunizations – Immunization Schedules

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

	Series Name	Last Given Date	Recommended Date	Earliest Date	Past Due Date	Status	Refusals	Reactions
✔	DTaP/DT	8/3/2004	8/15/2022	8/15/2017	9/14/2022	Current		
❓	Rotavirus					Not Indicated		
✔	Pneumo Conjugate (PCV)	10/22/2001				Complete		
✔	HPV	10/2/2015				Complete		
✔	Meningococcal	8/15/2012	6/28/2016	6/28/2016	6/28/2019	Current		
✔	Tdap	8/15/2012				Complete		
⚠	Flu		12/28/2000	12/28/2000	1/27/2001	Past Due		
✔	MMR	8/3/2004				Complete		
✔	Hib	10/22/2001				Complete		
✔	Polio	8/3/2004				Complete		
✔	Varicella	8/15/2012				Complete		
✔	Hep-B	1/4/2001				Complete		
✔	Hep - A	8/3/2004				Complete		

VAERS - Vaccine Adverse Event Reporting System

Figure 73 – Forecasted Vaccination Intervals and Status

STATUS	ICON	DEFINITION
Current	✅	Meets forecasted immunization date
Complete	✅	Requires no additional immunization
Not Indicated	❓	No information available
Due	ℹ️	Within forecasted immunization date
Past Due	⚠️	Exceeded forecasted immunization date

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).

	Series Name	Last Given Date	Recommended Date	Earliest Date	Past Due Date	Status	Refusals	Reactions
✅	DTaP/DT	8/3/2004	8/15/2022	8/15/2017	9/14/2022	Current		
❓	Rotavirus					Not Indicated		
✅	Pneumo Conjugate (PCV)	10/22/2001				Complete		
✅	HPV	10/2/2015				Complete		
✅	Meningococcal	8/15/2012	6/28/2016	6/28/2016	6/28/2019	Current		
✅	Tdap	8/15/2012				Complete		
⚠️	Flu		12/28/2000	12/28/2000	1/27/2001	Past Due		
✅	MMR	8/3/2004				Complete		
✅	Hib	10/22/2001				Complete		
✅	Polio	8/3/2004				Complete		
✅	Varicella	8/15/2012				Complete		
✅	Hep-B	1/4/2001				Complete		
✅	Hep - A	8/3/2004				Complete		

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).

Figure 75 - View Immunization - Series Name

Table 2 gives users a description of the information provided for each dose within a vaccine series.

PARAMETER	DESCRIPTION
Date Given	Date vaccine given to patient
Vaccine	Name of vaccine patient received
Brand Name (View Series only)	Vaccine manufacturer's name
Dose #	Sequence in which vaccine was given
Lot #	Lot Number of vaccine
Given By	Name of provider administering vaccine
Site	Location on body vaccine was administered to
Valid	✔ Dose valid through forecaster ⊘ Dose invalid
History	If checked, ✔ the vaccine was updated to patient's immunization record using **History Shots**
Reactions	If checked, ✔ patient experienced an adverse reaction to vaccine reportable through VAERS
Actions (Available in View All Only)	🗑 Delete vaccine. Users must confirm any action by selecting the **OK** button. To cancel the action, click the **Cancel** button

Table 2 – Vaccine Schedule

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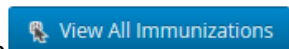
Patient Immunizations

View Schedules

Date Given	Vaccine	Lot Number	Given By	Imm Site	Valid?	History	Actions
8/3/2004	DTaP, 5 pertussis antigens	DTPA630A2		LD-Left Deltoid	✔	✔	🗑
10/22/2001	DTaP, 5 pertussis antigens				✔	✔	🗑
1/4/2001	DTaP, 5 pertussis antigens	DTPA961A2		LVL-Left Vastus Lateralis	✔	✔	🗑
10/27/2000	DTaP, 5 pertussis antigens				✔	✔	🗑
8/18/2000	DTaP, 5 pertussis antigens	DTPA961A2			✔	✔	🗑
8/3/2004	Hep A, ped/adol, 2 dose	VHA814A2		LD-Left Deltoid	✔	✔	🗑
7/24/2002	Hep A, ped/adol, 2 dose				✔	✔	🗑
6/28/2000	Hep B, adolescent or pediatric	0316K			✔	✔	🗑
10/22/2001	Hib (HbOC)				✔	✔	🗑
1/4/2001	Hib-Hep B	0290K		RVL-Right Vastus Lateralis		✔	🗑
10/27/2000	Hib-Hep B					✔	🗑
8/18/2000	Hib-Hep B	0290K				✔	🗑
10/2/2015	HPV, quadrivalent	L007560		LD-Left Deltoid	✔		
8/8/2014	HPV, quadrivalent	J009243		LD-Left Deltoid	✔		
12/27/2013	HPV, quadrivalent				✔	✔	🗑
8/3/2004	IPV	X0707-2		RD-Right Deltoid	✔	✔	🗑
1/4/2001	IPV	R1251-2			✔	✔	🗑
10/27/2000	IPV				✔	✔	🗑
8/18/2000	IPV	R1346-2			✔	✔	🗑
8/15/2012	Meningococcal MCV4O	M10050A-NONVFC		LD-Left Deltoid	✔	✔	🗑
8/3/2004	MMR	0040P		RA-Right Upper Arm	✔	✔	🗑
10/22/2001	MMR				✔	✔	🗑
10/22/2001	Pneumococcal conjugate PCV 7				✔	✔	🗑
4/17/2001	Pneumococcal conjugate PCV 7	472-550			✔	✔	🗑
8/18/2000	Pneumococcal conjugate PCV 7				✔	✔	🗑
8/15/2012	Tdap	U4393BA-NONVFC		LD-Left Deltoid	✔	✔	🗑
8/15/2012	Varicella	G007461-NONVFC		RA-Right Upper Arm	✔	✔	🗑
7/10/2001	Varicella				✔	✔	🗑

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.

Information

Are you sure you want to delete this immunization?

Cancel   OK

Click the **View Schedules** button ![View Schedules] to return to the **Immunization Schedules** (Figure 72).

Add Immunizations
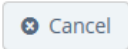
Immunizations administered to a patient by an OSIIS provider are added to the patient's record using the **Add Immunizations** button ![+ Add Immunization] located in the upper, left hand corner of the **Immunizations Schedules** screen.

Users are then directed to the access **Add/Edit Immunizations** screen (Figure 77). All fields with the exception of **Has Reaction** checkbox ![Has Reaction] 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 becorrected 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 ![Cancel] . 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):

Figure 77 – Add /Edit Immunization

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** – ☐ 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.

Ordering Authority:

-Select-
-Select-
MICHAEL D DAVID DO
JOSEPH J GELINAS APRN-CNP
AUNNA HERBST DO
MATTHEW B MOTE DO

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:
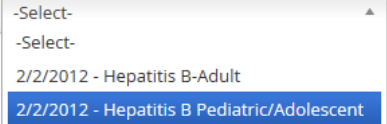
-Select-
Hep A, unspecified formulation
Hep B, adolescent or pediatric
Hib (PRP-OMP)
Hib (PRP-T)
HPV, quadrivalent
Influenza, unspecified formulation
IPV
MMR
MMRV
Rotavirus, pentavalent

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

Vaccine Given:

-Select-
H
Hep A, unspecified formulation
Hep B, adolescent or pediatric
Hib (PRP-OMP)
Hib (PRP-T)
HPV, quadrivalent

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.

ID	Schedule Name	VIS Version	Max Dose
4	Hep-B	-Select- -Select- 2/2/2012 - Hepatitis B-Adult 2/2/2012 - Hepatitis B Pediatric/Adolescent	0

7. **Funding Source** - Move cursor to select the Funding Source for the vaccine and click to select.
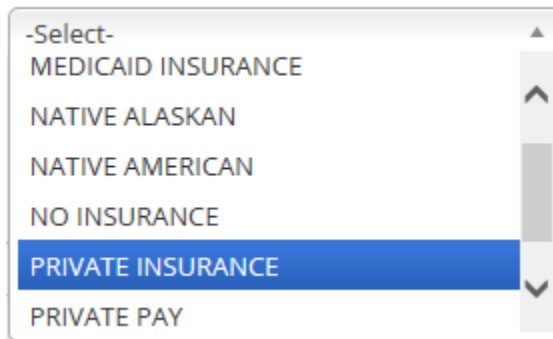
Funding Source:

-Select-
-Select-
317/Federal Purchased
Private/Locally Purchased
State Purchased
VFC Replacement
VFC/Federal Purchased

*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' insurance eligibility from the list of options.
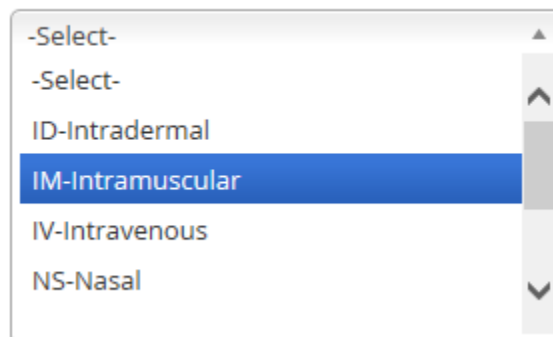
Eligibility:

-Select-
MEDICAID INSURANCE
NATIVE ALASKAN
NATIVE AMERICAN
NO INSURANCE
PRIVATE INSURANCE
PRIVATE PAY

10. **Route** –Select method vaccine was given.
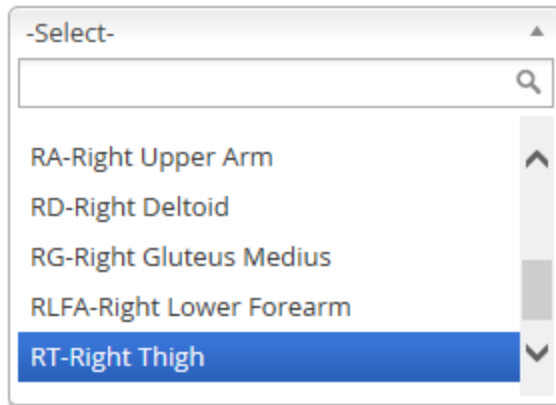
Route:

-Select-
-Select-
ID-Intradermal
IM-Intramuscular
IV-Intravenous
NS-Nasal

11. **Administration Site** - Select where on patient's body vaccine was given using either the vertical scroll bar
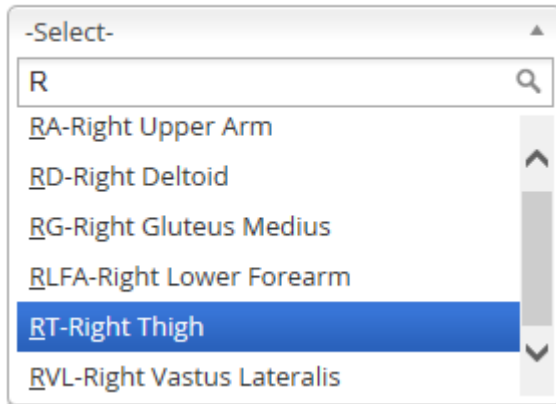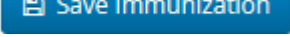
Administration Site:

or by entering the first letter of the proposed administration site in the **Search** field . Click to select from the listed administration sites.

Administration Site:

11. Once form is completed, click the **Save Immunization** button to add the immunization to the patient's shot record.

Figure 78 - Completed Add Immunization Form ID 3340452

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 Successfully saved immunization .

  a. Users must also acknowledge if another immunization will be added. Select ✔ Yes to stay on the **Add/Edit immunization** screen or ✖ No 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).

Patient

👤 WELLS, DECOREY, SEMAJ	**DOB:** 12/10/2015	**Age:** 0 y 0 m 1 d	**Demographics ID:** 3340452	🖨 Schedules	🖨 Shot Record

Summary   **Demographics**   **Immunizations**   **History Shots**   **Progress Notes**

Immunization Schedules

🔍 View All Immunizations   ➕ Add Immunization   👎 Refusals

Vaccination Schedules

	Series Name	Last Given Date	Recommended Date	Earliest Date	Past Due Date	Status	Refusals	Reactions
✔	DTaP/DT		2/10/2016	1/21/2016	3/11/2016	Current		
✔	Rotavirus		2/10/2016	1/21/2016	3/11/2016	Current		
✔	Pneumo Conjugate (PCV)		2/10/2016	1/21/2016	3/11/2016	Current		
✔	HPV		12/10/2026	12/10/2024	12/10/2028	Current		
❓	Tdap					Not Indicated		
✔	Flu		6/10/2016	6/10/2016	7/10/2016	Current		
✔	MMR		12/10/2016	12/10/2016	4/10/2017	Current		
✔	Hib		2/10/2016	1/21/2016	3/11/2016	Current		
✔	Polio		2/10/2016	1/21/2016	3/11/2016	Current		
✔	Varicella		12/10/2016	12/10/2016	4/10/2017	Current		
✔	Hep-B	12/11/2015	1/11/2016	1/8/2016	4/10/2016	Current		
✔	Hep - A		12/10/2016	12/10/2016	12/10/2017	Current		

VAERS - Vaccine Adverse Event Reporting System

Figure 79 - Updated Immunization Schedules

Immunization Schedule Status Report

OSIIS

This form was created using the Oklahoma State Immunization Information System(OSIIS)
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

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

Printed From: 20641 - GRAND LAKE FAMILY MEDICINE - GROVE   Page 1 of 1

Oklahoma State Department of Health - Immunization Service
1000 N.E. 10th Street, Room 911
Oklahoma City, OK 73117-1299   (800) 234 - 6196

Form Revised July 2012

Print Date: 12/16/2015 2:58 PM

Figure 80 - Updated Immunization Status Report

Figure 81 - Updated Immunization Record

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).
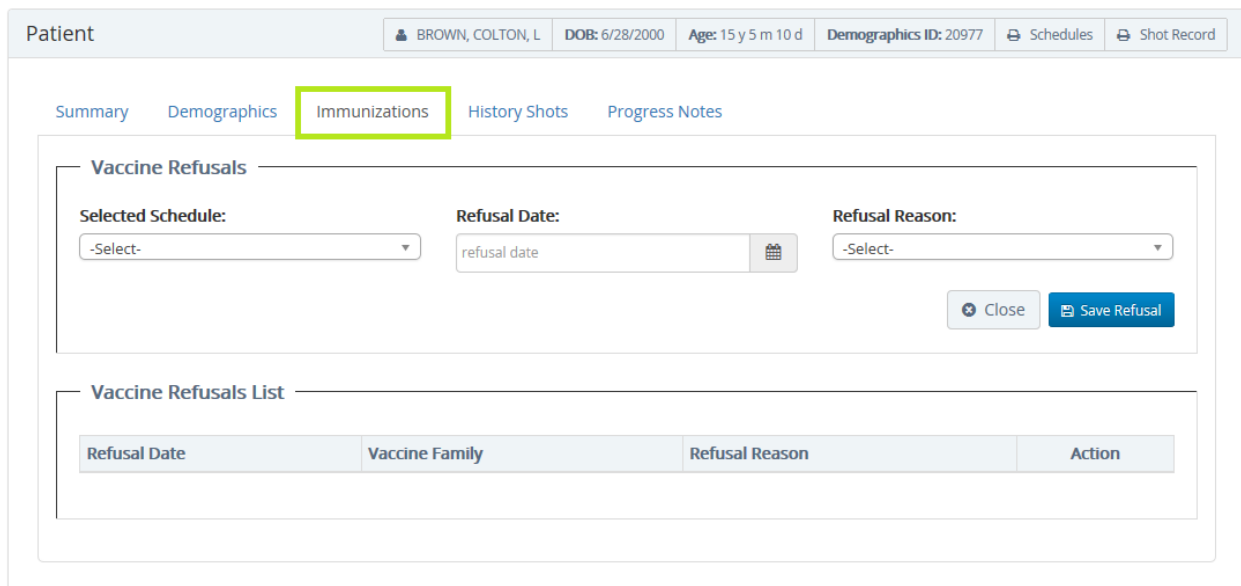
Figure 82 - Vaccine Refusal Screen

1. **Select Schedule** – drop-down menu of vaccine patient does not wish to have administered
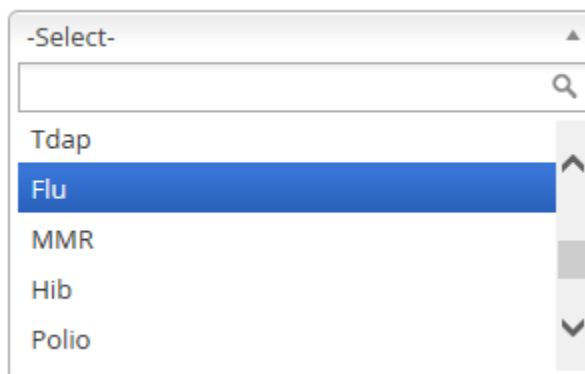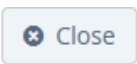
2. **Refusal Date** – add date using calendar [calendar icon] or by typing in mm/dd/yyyy format.

3. **Refusal Reason –** drop-down menu to select from three reasons: Patient Decision, Parent Decision, Other
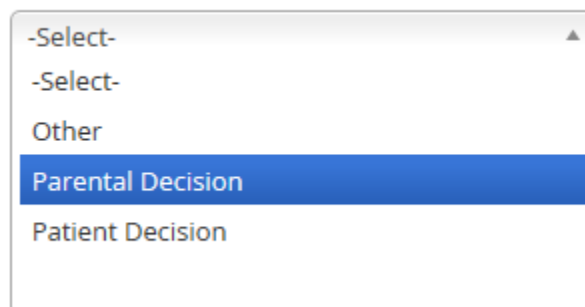
4. Click **Save Refusal** button [Save Refusal] to update the **Vaccine Refusal List** or **Close** button [Close] to return to **Immunization Schedules**.
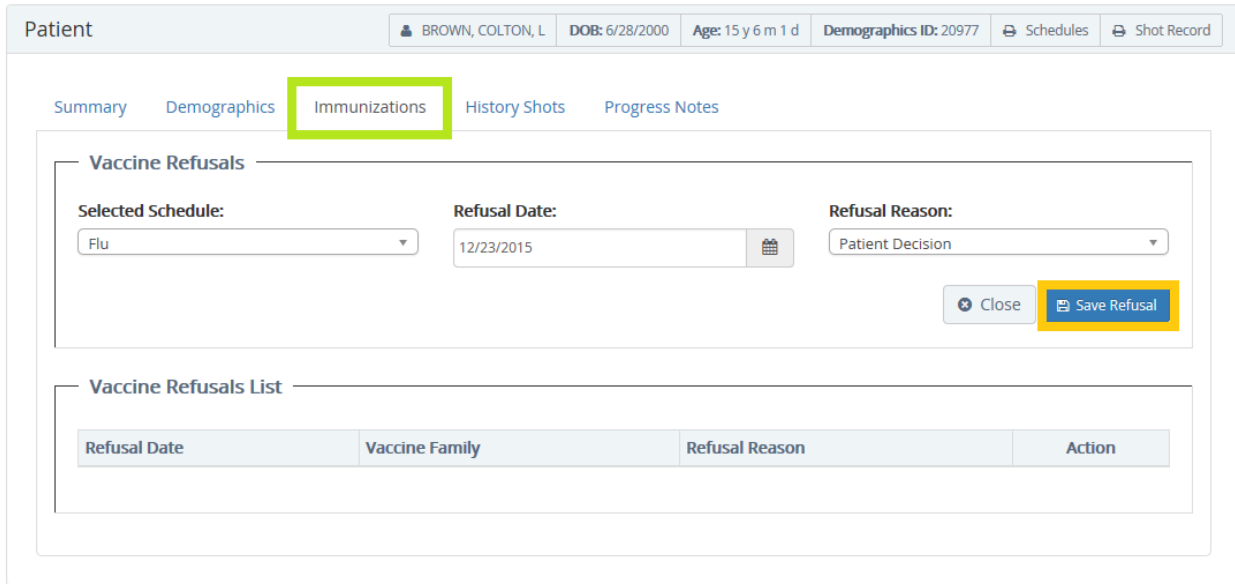
Figure 83 - Flu Vaccine Refusal Demo ID 20977

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).
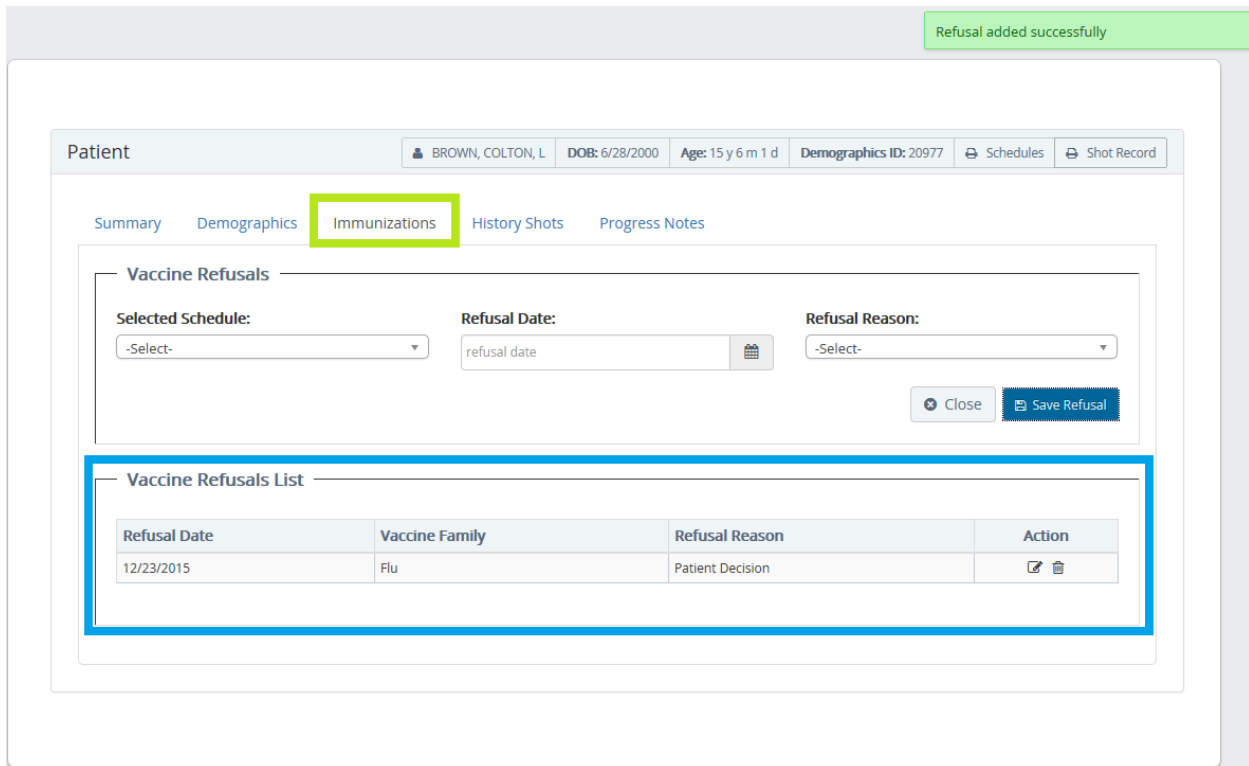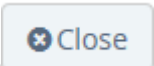
Figure 84- Vaccine Refusals List

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

Figure 85 - Immunization Schedules

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)**

VAERS - Vaccine Adverse Event Reporting System

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 [View All Immunizations]. to access the list of the patient's immunizations (Figure 86).

Figure 86 - Immunizations Schedule

2. At the **Patient Immunizations** screen select the **Edit** icon for the vaccine the patient had a reaction to (Figure 87).

Figure 87 – Hep B - IPV immunization

3. Click to check the reaction experienced by the patient from the **Immunization Reactions** window and then click the **Save Reactions** button (Figure 88).
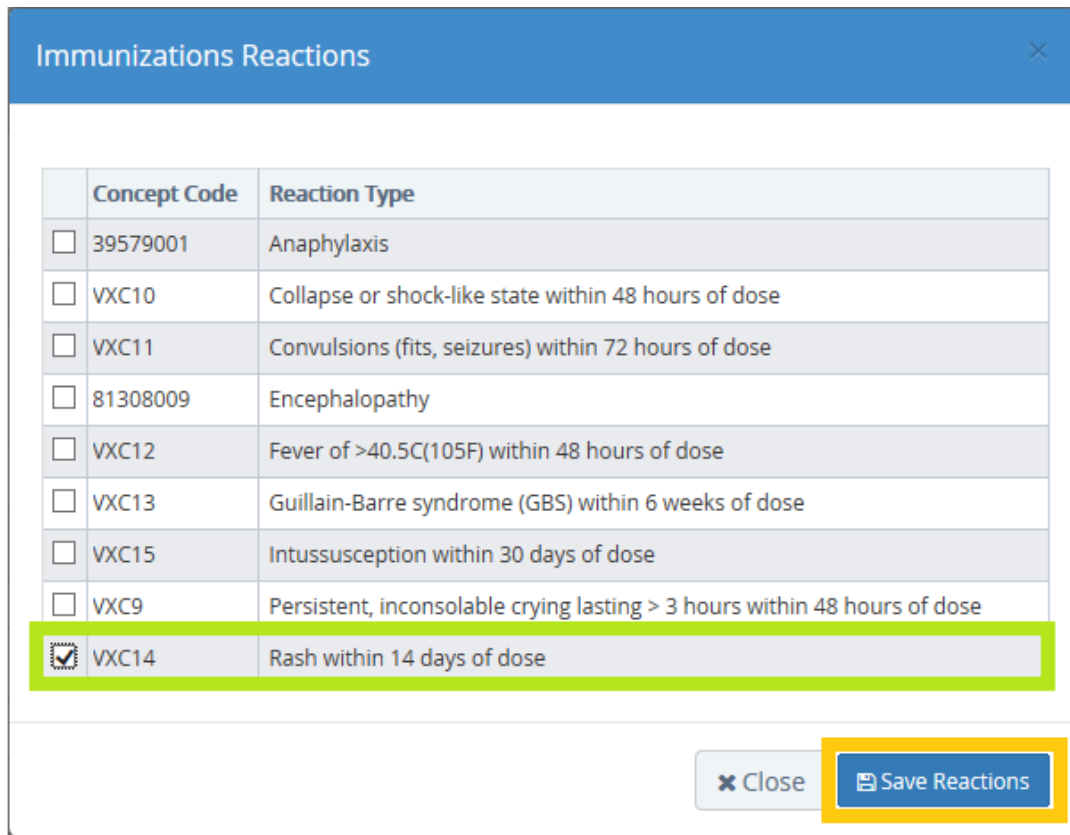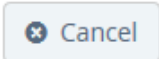
Figure 88 - Immunizations Reactions

4.   At the **Add/Edit Immunizations** screen click the **Save Immunization** button [Save Immunization] to complete adding the reaction. Select the **Cancel** button [Cancel] if the reaction no longer needs to be added.

Figure 89 – Hep B Reaction Patient 3340452

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).

Figure 90 – Updated immunization Schedules

6. When viewing the **Patient Immunizations** the **Actions** column now displays the **Caution** icon ⚠ noting a reaction to the vaccine (Figure 91). The patent's immunization record will also reflect the reaction (Figure 91)

Figure 91 - Updated Hep B Immunizations Patient 3340452

State of Oklahoma Official Immunization Record

OSIIS

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

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

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

Allergies: None

Reactions: 12/11/2015: Hep-B

Refusals: None

Exemptions: None

	Vaccine Name	Date Given	Given By
	DTaP/DT		
	Rotavirus		
	Pneumo Conjugate (PCV)		
	HPV		
	Meningococcal		
	Tdap		
	Flu		
	MMR		
	Hib		
	Polio		
	Varicella		
	Hep-B		
1	Hep B, adolescent or pediatric	12/11/2015	GRAND LAKE FAMILY MEDICINE

	Vaccine Name	Date Given	Given By
	Hep - A		

Legend : ⦸=Invalid dose.

Printed By: 20641 - GRAND LAKE FAMILY MEDICINE - GROVE

Signature: _____   Date: _____

Clinic Stamp

Oklahoma State Department of Health - Immunization Service
1000 N.E. 10th Street, Room 911
Oklahoma City, OK 73117-1299

(800) 234 - 6196

Form Revised July 2012

Print Date 12/16/2015 2:34 PM

Figure 92 - Updated Shot Record Reaction Hep B

History Shots
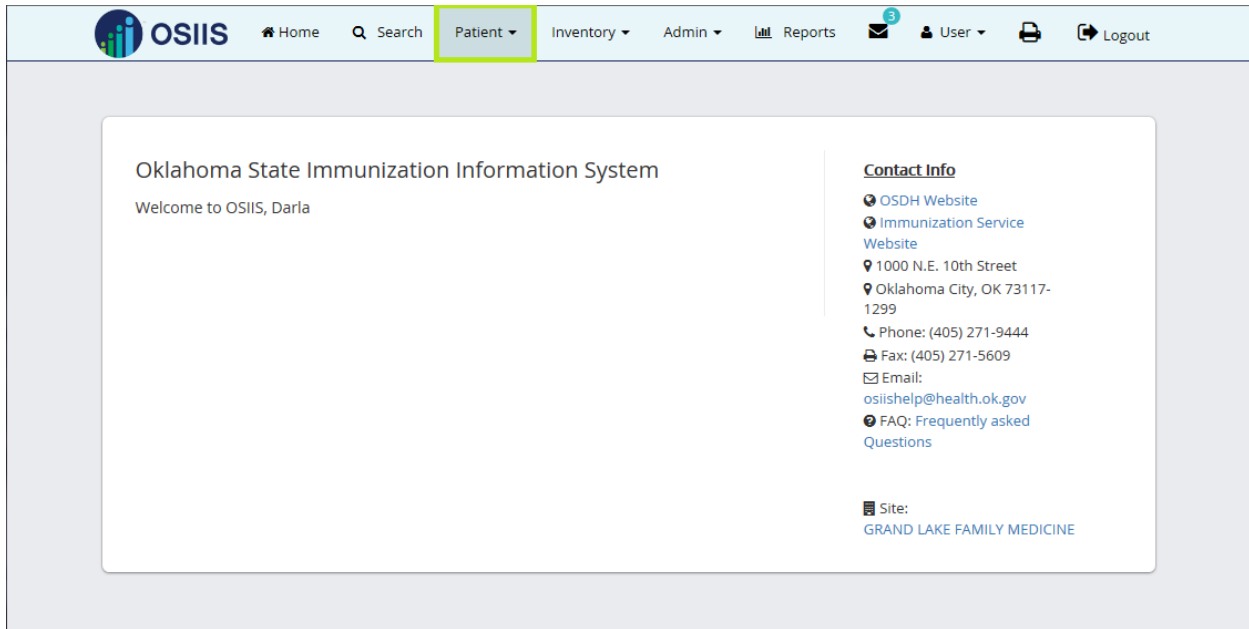
Figure 93 - OSIIS Homepage- Patient Tab

To begin updating a patient's shot record:

1. At OSIIS **Homepage** main menu **Toolbar**, click **Patient** tab and select **History Shots**.
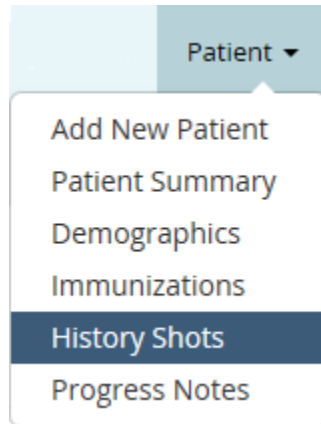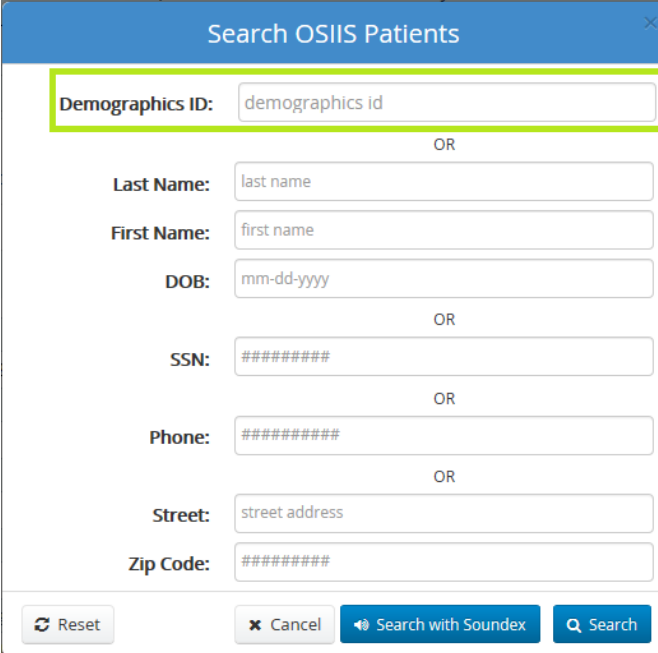
Figure 94 - Patient Menu – History Shots

2. Search the OSIIS patient database using **one** of the search criteria:
   - **Demographics ID**
     - o Enter patient's ID number. Proceed to **Step 3**.

Figure 95 - Search OSIIS Patients - Demographics ID

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

Figure 96 - Patient Search-Last Name, First Name, DOB

   - *or* **Social Security Number**
     - o   Enter patient's SSN without dashes. Proceed to **Step 3.**

Figure 97 - Patient Search - SSN

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

Figure 98 - Patient Search - Phone Number

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

Figure 99 - Patient Search - Street Address and Zip Code

3. Click the **Search** button [Q Search] .

- If the spelling of a patient's **Last Name** is uncertain, using the **Search with Soundex** [◄» 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).

Figure 100 - History Shots Vaccine List
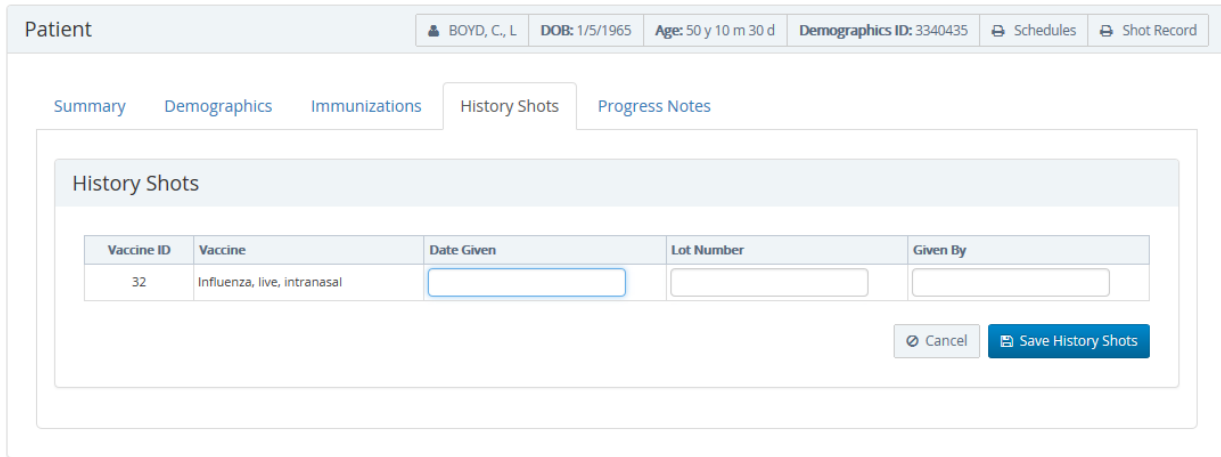
5. Click the checkbox to the left of the vaccine to be entered from list provided ☑ Influenza, live, intranasal

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 **✚ Enter Shots**. 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
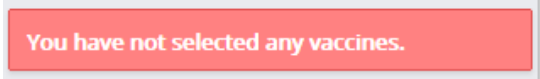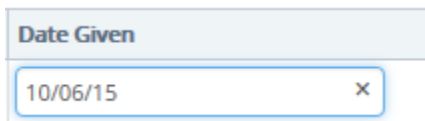
        You have not selected any vaccines. . Ensure the vaccine to be added is checked and repeat **Step 3**.

| Patient | | 👤 BOYD, C., L | DOB: 1/5/1965 | Age: 50 y 10 m 30 d | Demographics ID: 3340435 | 🖨 Schedules | 🖨 Shot Record |

Summary   Demographics   Immunizations   History Shots   Progress Notes

History Shots

Vaccine ID	Vaccine	Date Given	Lot Number	Given By
32	Influenza, live, intranasal			

⊘ Cancel   💾 Save History Shots

Figure 101 – Selected History Shots

8. Enter date the immunization was given

Date Given
10/06/15 ✕

- If no date provided history shot will not be save and error message broadcast in the top, right corner of the screen (Figure 102).
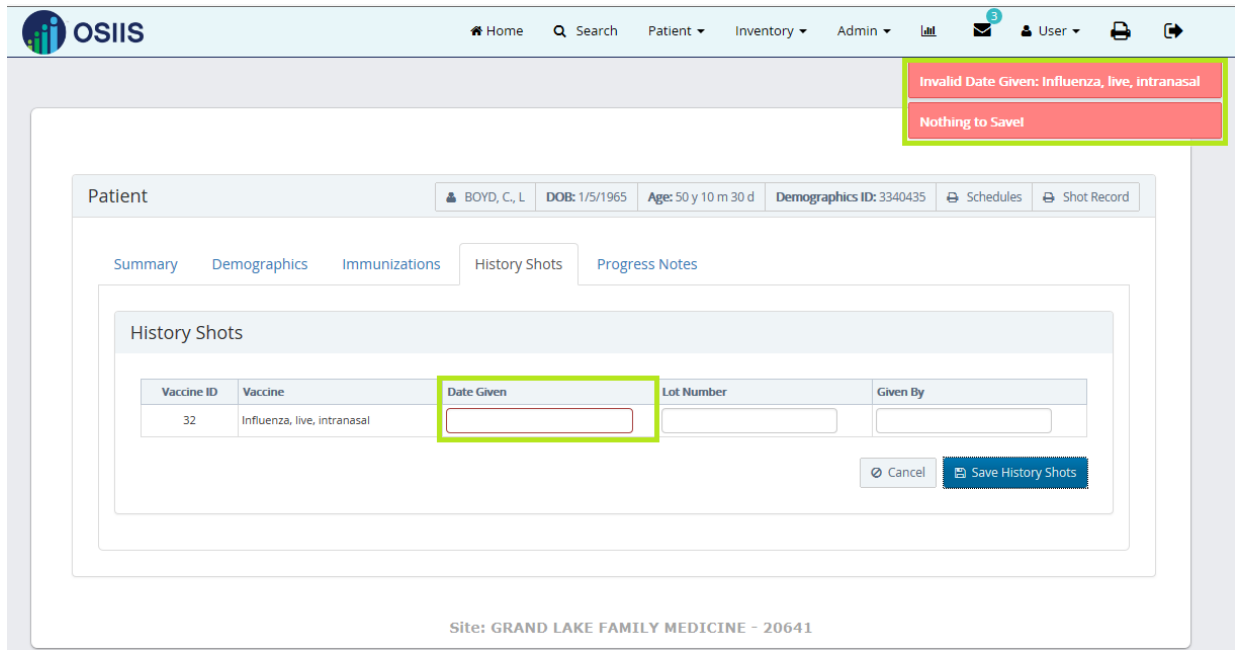
Figure 102 - History Shots Error- No Date

9. Enter the vaccine **Lot Number** if available (optional).

10. Enter the name of the facility where vaccine was administered **Given By** (optional).
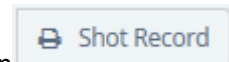
11. Click **Save History Shots** button

12. Once saved, a confirmation of the successful save is broadcast in the upper, right hand corner of the **History Shots** screen.
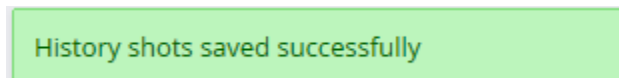
Updates from the History Shots will appear on the patient's official State of Oklahoma **Immunization Record** (Figure 103) and **Immunization Schedule Status Report** (Figure 104).

13. To view and or print the patient's **Immunization Record**, click the **Shot Record** button .

State of Oklahoma Official Immunization Record

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

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

Name: BOYD, C. L.	**Date Of Birth:** 01/05/1965 **Gender:** M **Client ID:** 3340435

Allergies: None

Reactions: None

Refusals: None

Exemptions: None

	Vaccine Name	Date Given	Given By
	DTaP/DT		
	Rotavirus		
	Pneumo Conjugate (PCV)		
	HPV		
	Meningococcal		
	Tdap		
1	Td (adult), adsorbed	11/18/2015	HISTORY
	Flu		
1	Influenza, live, intranasal	10/06/2015	HISTORY
	MMR		
	Hib		
	Polio		
	Varicella		

	Vaccine Name	Date Given	Given By
	Hep-B		
	Hep - A		

Legend : ⊘=Invalid dose.

Printed By: 20641 - GRAND LAKE FAMILY MEDICINE - GROVE

Signature: _____ Date: _____

Clinic Stamp

Oklahoma State Department of Health - Immunization Service
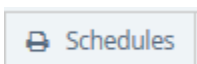1000 N.E. 10th Street, Room 911
Oklahoma City, OK 73117-1299

(800) 234 - 6196

Form Revised July 2012

Print Date 12/4/2015 4:25 PM

Figure 103 - History Shots - Updated Immunization Record

14. To view and or print the patient's **Immunization Schedule Status Report**, click the **Schedules** button
🖨 Schedules
.

OSIIS

Immunization Schedule Status Report

This form was created using the Oklahoma State Immunization Information System(OSIIS)
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: BOYD, C. L.   **Date Of Birth:** 01/05/1965   **Gender:** M   **Client ID:** 3340435

Exemptions: None

Series Name	Last Given Date	Recommended Date	Earliest Next Date	Past Due Date	Status
DTaP/DT					Not Indicated
Rotavirus					Not Indicated
Pneumo Conjugate (PCV)					Not Indicated
HPV					Not Indicated
Tdap	11/18/2015				Complete
Flu	10/6/2015	10/1/2016	8/1/2016	10/31/2016	Current
MMR		11/3/2015	11/3/2015	12/3/2015	Past Due
Hib					Not Indicated
Polio					Not Indicated
Varicella					Not Indicated
Hep-B		1/1/1986	1/1/1986	1/31/1986	Past Due
Hep - A		1/1/1996	1/1/1996	1/31/1996	Past Due

Printed From: 20641 - GRAND LAKE FAMILY MEDICINE - GROVE   Page 1 of 1

Oklahoma State Department of Health - Immunization Service
1000 N.E. 10th Street, Room 911
Oklahoma City, OK 73117-1299   (800) 234 - 6196

Form Revised July 2012

Print Date: 12/7/2015 9:28 AM

Figure 104 – History Shots –Updated Immunization Status Report

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.

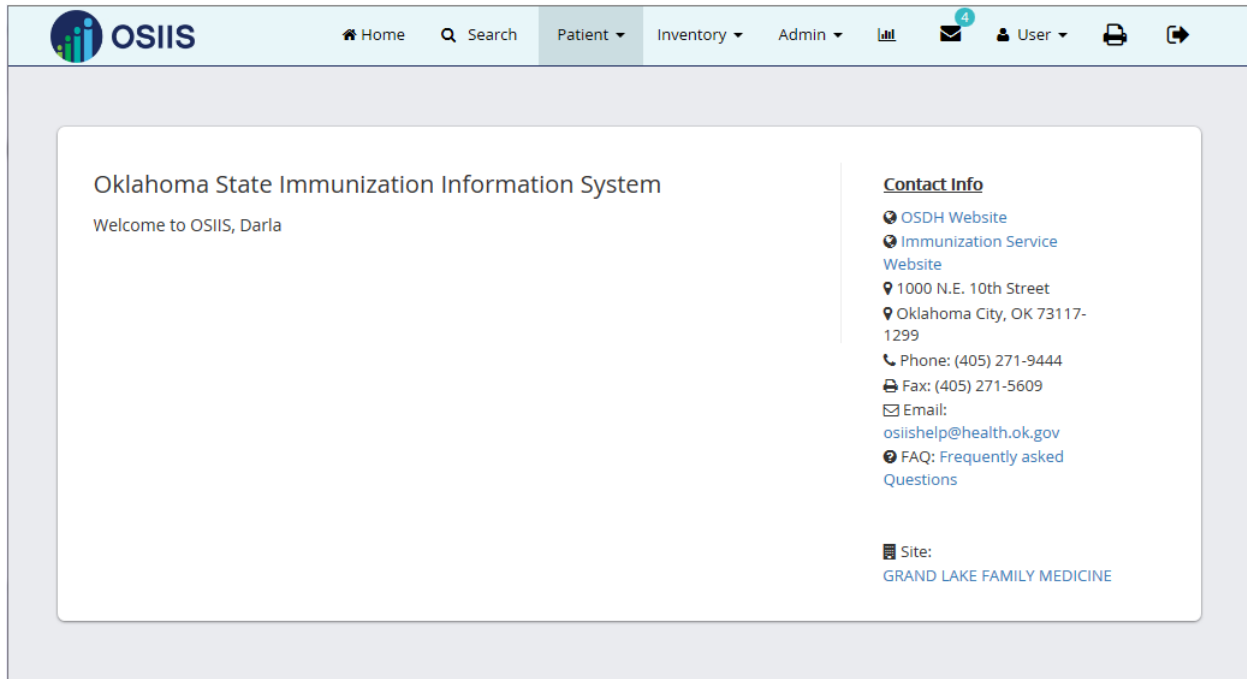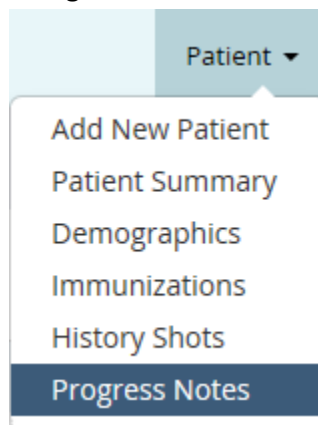To begin adding patient **Progress Notes f**rom the **OSIIS Homepage**:

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**
        - o 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**
  - o 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**
  - o   Enter patient's SSN without dashes. Proceed to **Step 3.**

Figure 108 - Patient Search - SSN

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

Figure 109 - Patient Search - Phone Number

- *or* **Street Address** and **Zip Code**
  - o Enter the patient's address and 5-digit zip code where indicated. Proceed to **Step 3.**

Figure 110 - Patient Search - Street Address and Zip Code

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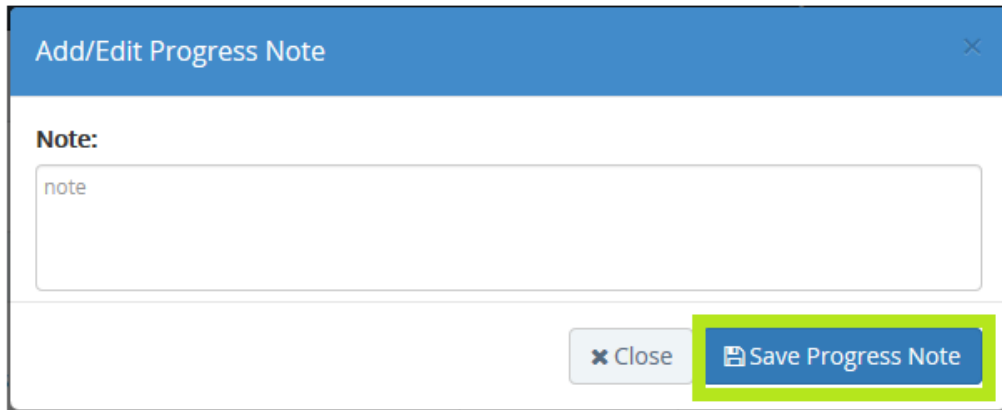
Once a single record is returned, users are directed to the patient's Progress Notes Screen (Figure 111).

Figure 111 - Progress Notes

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).
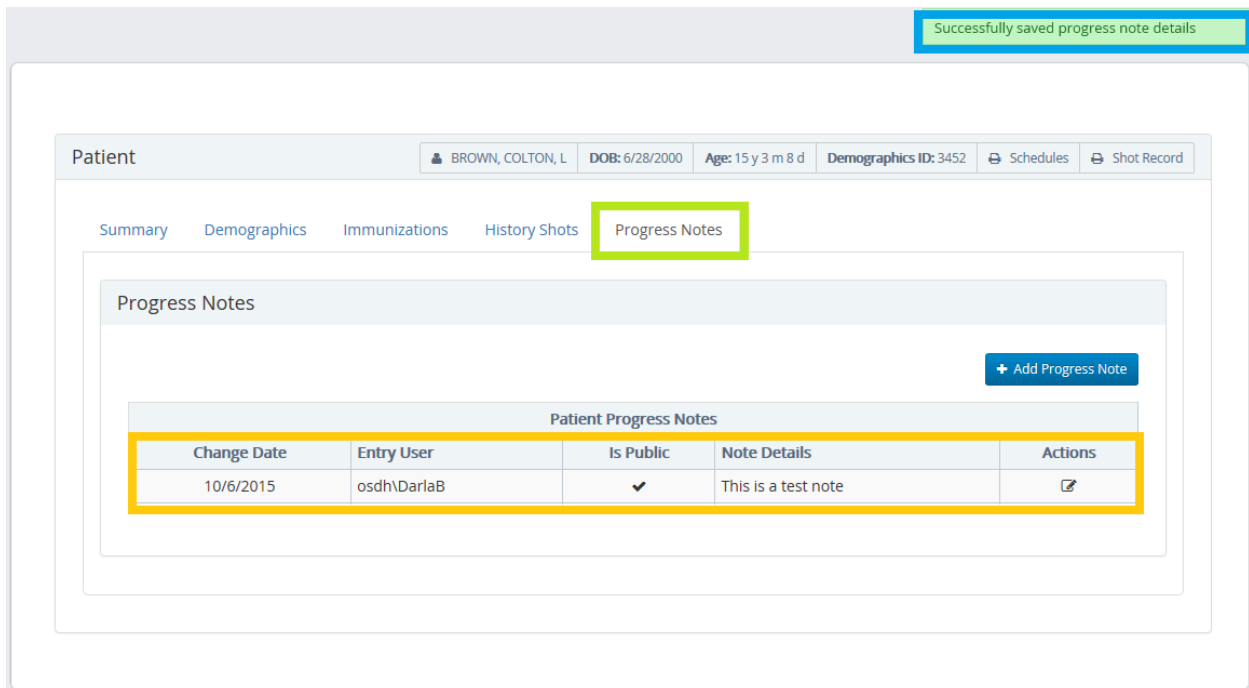

Figure 112 - Progress Note Added

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

FIELD	DESCRIPTION
Change Date	Date progress note entry is made/updated
Is Public *(Default)*	Check mark indicates progress note will be seen by all users

Entry User	User ID of progress note creator
Actions	✏️ Edit

Inventory

The **Inventory** module allows OSIIS users to control and monitor the site's vaccine quantities. Specific functions include:
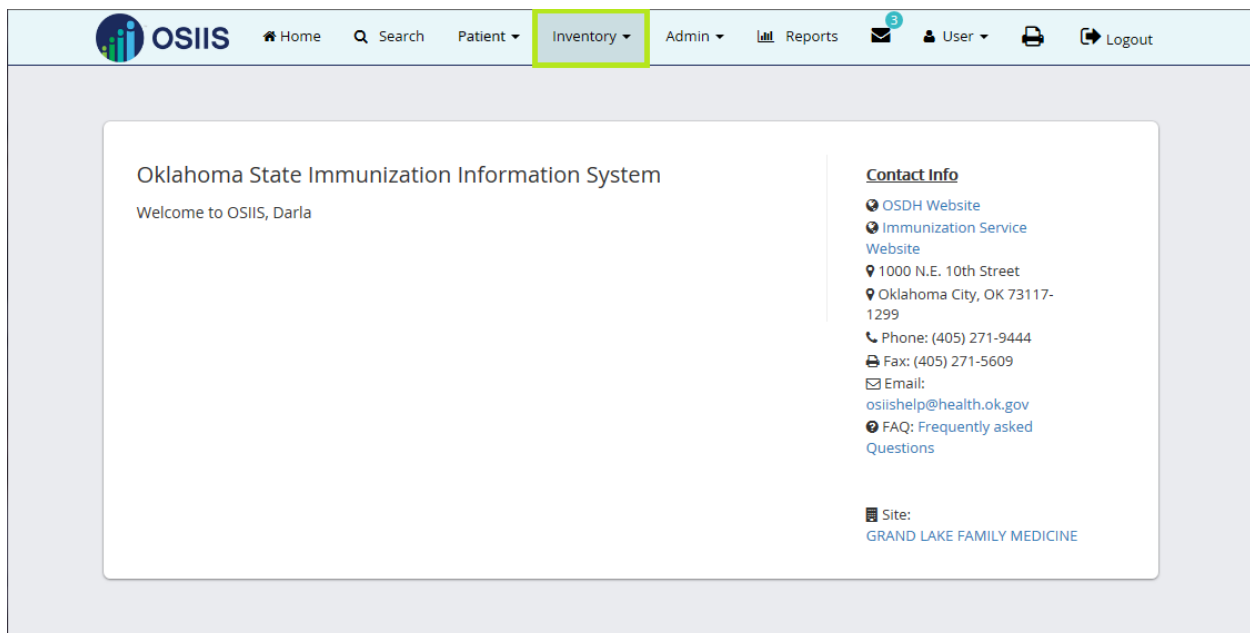
- **Receive Shipments**
- **Manage Inventory**
- **Transfer Inventory**
- **Vaccine Preferences**
- **Vaccine Request**
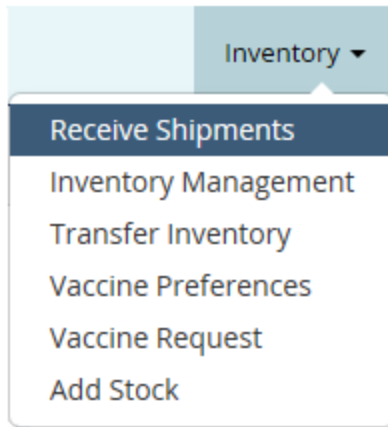- **Add Stock**

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 ✉️³ . 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**

Under Actions **column, click the Receive Items icon**

Site: DARLAS TEST CLINIC - 331

Figure 113 - Receive Shipments Site 331

2. In the Receive Items window, user will enter the **Lot Number** for the items received

Receive Shipment Item

Shipment ID: 538

Shipped Qty: 5

Item Description: HPV - SDV Gardasil (MERCK)

Expiration Date: 12/31/2061

Qty Accepted: 5

Lot Number: ABC123

✖ Cancel   ✔ Verify Receive Shipment

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

Information

Are you sure you want to receive this shipment?

Cancel   OK

   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 👁

Figure 114 - Updated Current Inventory
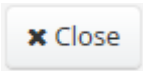
6. The received inventory is then stored and posted as a transaction
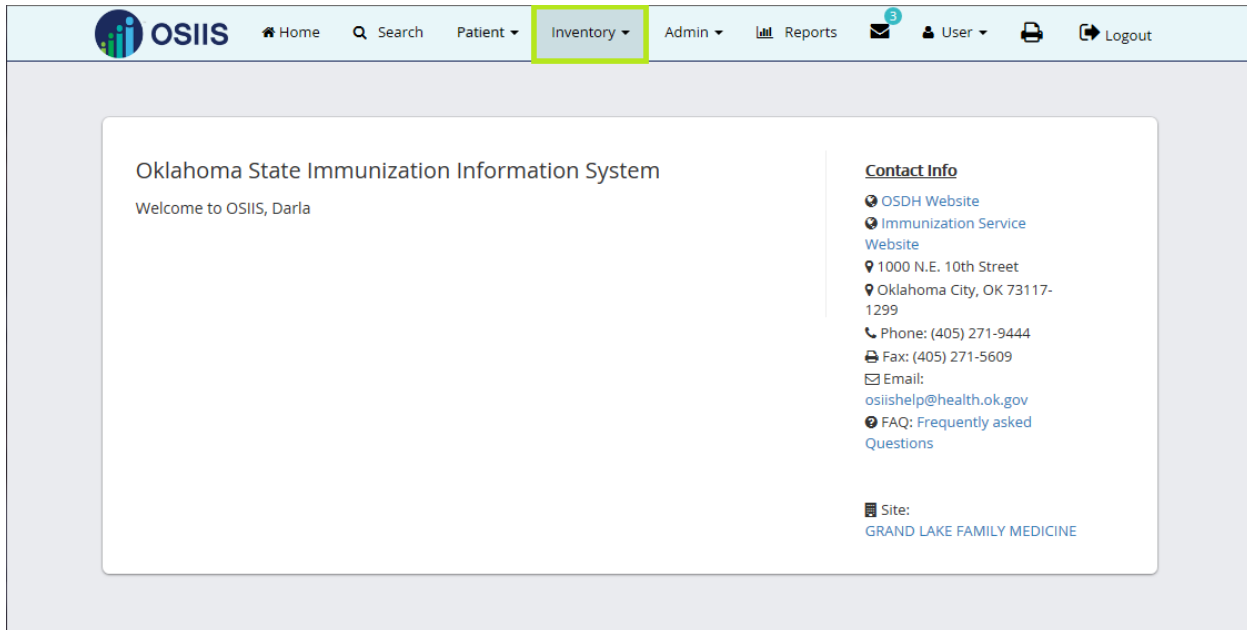

**Figure 115 - Received Shipment Transaction**

7. Click the Close button [✖ Close] 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.
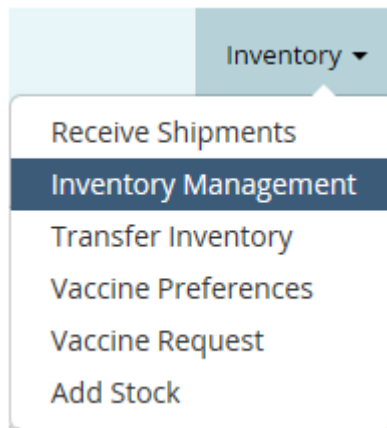
At the **Current Inventory** screen, users can modify and adjust the quantity of a site's vaccine inventory. Vaccine that is approaching its expiration date is indicated using the **Almost Expired** icon and appears 30 days prior to expiration. Vaccine that has expired is indicated using the **Expired** icon (Figure 116).

Site Inventory

Receive Shipments   **Manage Inventory**   Transfer   Vacc. Preferences   Vacc. Request   Add Stock

Current Inventory

Excel   PDF

10 ▼ records per page   Search: [   ]

Description	Local Qty	Lot Number	Exp. Date	Source	Unit	NDC#	Action
DTAP - SDV Daptacel (SANOFI)	4	SANO4141	2/1/2017	317/Federal Purchased	Dose		◑ 👁
DTaP-IPV-Hib - SDV Pentacel (Sanofi)	20	PLAYA123	2/11/2018	VFC/Federal Purchased	Each	49281051005	◑ 👁
FLUVIRIN 4-18Y-VFC	20	123456	10/8/2015 ⚠	Private/Locally Purchased	Dose		◑ 👁 ✎
HPV - SDV Gardasil (MERCK)	10	ABC123	12/31/2061	VFC/Federal Purchased	Dose	00006404541	◑ 👁
MMRV - SDV Proquad (Merck)	10	PLAYA789	2/11/2016	VFC/Federal Purchased	Each	00006499900	◑ 👁
Varicella - SDV Varivax (Merck)	20	789987	12/1/2015	Private/Locally Purchased	Each	123456789001111	◑ 👁 ✎
Varicella - SDV Varivax (Merck)	10	SPLIT124	4/15/2016	VFC/Federal Purchased	Each	123456789001111	◑ 👁

Showing 1 to 7 of 7 entries

← Previous   **1**   Next →

Site: DARLAS TEST CLINIC - 331

Figure 116 - Current Inventory Site 331

Inventory Adjustments ◑ can be made due to:

- o **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
- o **Expired** –when a vaccine has exceeded the printed expiration date
- o **Spoiled** – used when vaccine is left out on counter or non-viable due to temperature excursion or other quality concerns
- o **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.**

Figure 117 - Current Inventory Site 116

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.

Figure 118 - Adjust Inventory

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.*

o 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

Figure 120 – Adjust Inventory

7. The **Manage Inventory** screen will now update to show a new **Local Qty 2** for DTAP-SDV Daptacel (SANOFI) vaccine.

Site: DARLAS TEST CLINIC - 331

Figure 121 – Manage Inventory

The completed transaction is now viewable in the vaccine's **View Items Transactions** window. To view:

1. Click the **View Items Transactions** icon
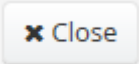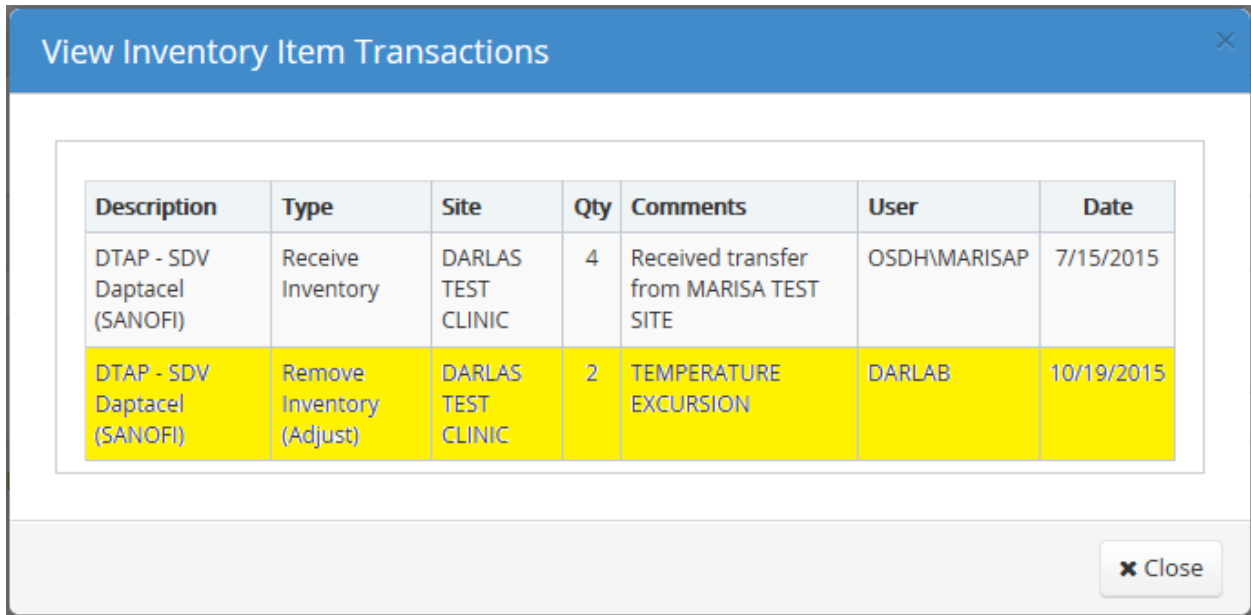
Figure 122 – Manage Inventory

2. The **View Inventory Item Transactions** window displays details for the decreased quantity of vaccine DTAP-SDV Daptacel (SANFONI). Click the **Close** button ✖ Close to return the **Current Inventory** screen.
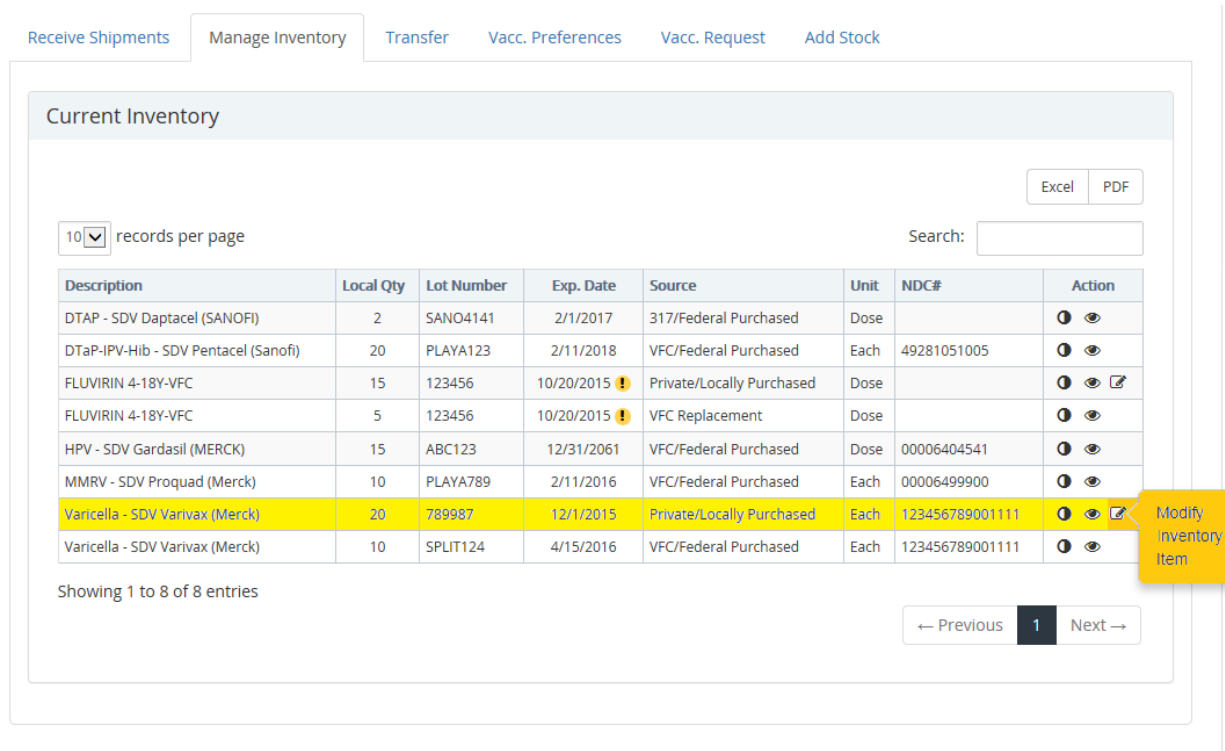
Figure 123 – View Inventory Item Transactions

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.
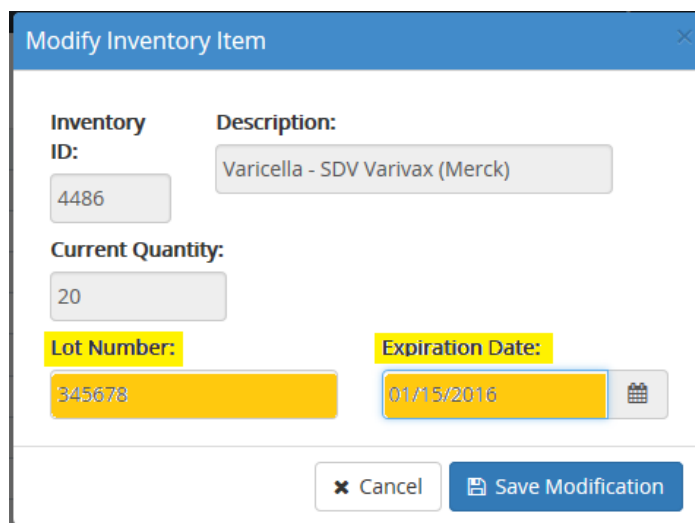

Description	Local Qty	Lot Number	Exp. Date	Source	Unit	NDC#	Action
DTAP - SDV Daptacel (SANOFI)	2	SANO4141	2/1/2017	317/Federal Purchased	Dose		◑ 👁
DTaP-IPV-Hib - SDV Pentacel (Sanofi)	20	PLAYA123	2/11/2018	VFC/Federal Purchased	Each	49281051005	◑ 👁
FLUVIRIN 4-18Y-VFC	15	123456	10/20/2015 ⚠	Private/Locally Purchased	Dose		◑ 👁 ✎
FLUVIRIN 4-18Y-VFC	5	123456	10/20/2015 ⚠	VFC Replacement	Dose		◑ 👁
HPV - SDV Gardasil (MERCK)	15	ABC123	12/31/2061	VFC/Federal Purchased	Dose	00006404541	◑ 👁
MMRV - SDV Proquad (Merck)	10	PLAYA789	2/11/2016	VFC/Federal Purchased	Each	00006499900	◑ 👁
Varicella - SDV Varivax (Merck)	20	789987	12/1/2015	Private/Locally Purchased	Each	123456789001111	◑ 👁 ✎
Varicella - SDV Varivax (Merck)	10	SPLIT124	4/15/2016	VFC/Federal Purchased	Each	123456789001111	◑ 👁

Modify Inventory Item

Figure 124 - Current Inventory Site 331

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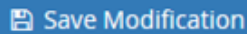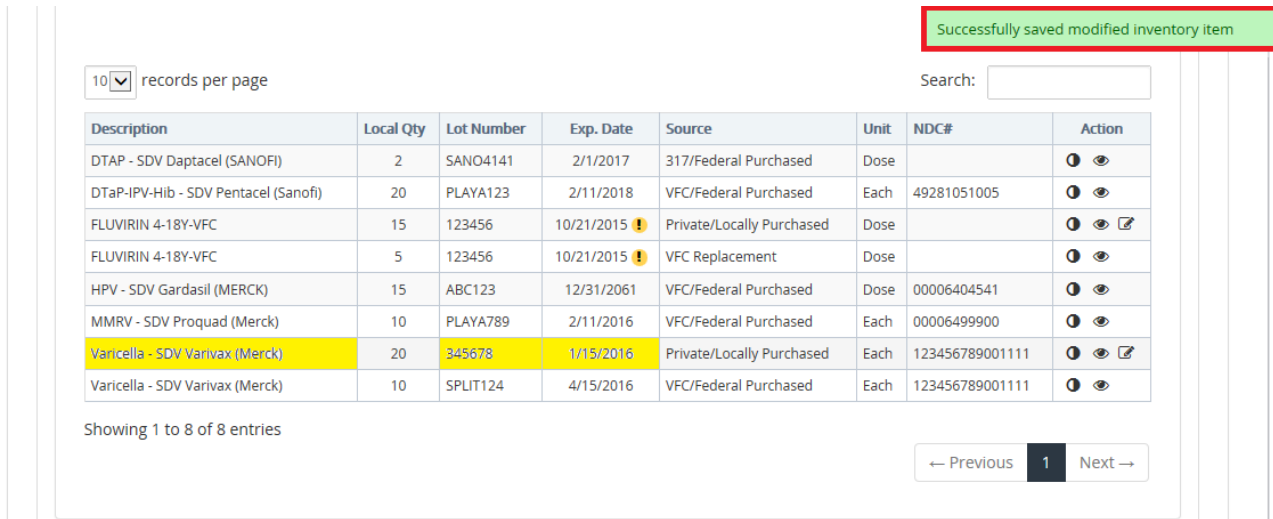
5. Click the **Save Modification** button to complete. The modifications will be reflected on the **Current Inventory** screen and within any patient records who received an immunization from the previous Lot Number. A confirmation message will also appear briefly, verifying successful completion of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

Figure 125 - Modified Varicella Vaccine

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 126 – Current Inventory

EXCEL FORMAT

OSIISnet - Oklahoma State Immunization Information System.csv - Microsoft Excel

	A	B	C	D	E	F	G	H
1	Description	Local Qty	Lot Number	Exp. Date	Source	Unit	NDC#	Action
2	DTAP - SDV Daptacel (SANOFI)	2	SANO4141	2/1/2017	317/Federal Purchased	Dose		
3	DTaP-IPV-Hib - SDV Pentacel (Sanofi)	20	PLAYA123	2/11/2018	VFC/Federal Purchased	Each	49281051005	
4	FLUVIRIN 4-18Y-VFC	15	123456	10/21/2015	Private/Locally Purchased	Dose		
5	FLUVIRIN 4-18Y-VFC	5	123456	10/21/2015	VFC Replacement	Dose		
6	HPV - SDV Gardasil (MERCK)	15	ABC123	12/31/2061	VFC/Federal Purchased	Dose	6404541	
7	MMRV - SDV Proquad (Merck)	10	PLAYA789	2/11/2016	VFC/Federal Purchased	Each	6499900	
8	Varicella - SDV Varivax (Merck)	20	345678	1/15/2016	Private/Locally Purchased	Each	1.23457E+14	
9	Varicella - SDV Varivax (Merck)	10	SPLIT124	4/15/2016	VFC/Federal Purchased	Each	1.23457E+14	

PDF FORMAT

OSIISnet - Oklahoma State Immunization Information System

Description	Local Qty	Lot Number	Exp. Date	Source	Unit	NDC#	Action
DTAP - SDV Daptacel (SANOFI)	2	SANO4141	2/1/2017	317/Federal Purchased	Dose		
DTaP-IPV-Hib - SDV Pentacel (Sanofi)	20	PLAYA123	2/11/2018	VFC/Federal Purchased	Each	49281051005	
FLUVIRIN 4-18Y-VFC	15	123456	10/21/2015	Private/Locally Purchased	Dose		
FLUVIRIN 4-18Y-VFC	5	123456	10/21/2015	VFC Replacement	Dose		
HPV - SDV Gardasil (MERCK)	15	ABC123	12/31/2061	VFC/Federal Purchased	Dose	00006404541	
MMRV - SDV Proquad (Merck)	10	PLAYA789	2/11/2016	VFC/Federal Purchased	Each	00006499900	
Varicella - SDV Varivax (Merck)	20	345678	1/15/2016	Private/Locally Purchased	Each	123456789001111	
Varicella - SDV Varivax (Merck)	10	SPLIT124	4/15/2016	VFC/Federal Purchased	Each	123456789001111	

Users can choose how to display the current vaccine inventory, depending upon the amount of vaccine available at the site.

Site: GRAND LAKE FAMILY MEDICINE - 1656

Figure 127 – Current Inventory

- 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.

Site Inventory

Receive Shipments   **Manage Inventory**   Transfer   Vacc. Preferences   Vacc. Request   Add Stock

Current Inventory

Excel   PDF

25 ▾ records per page   Search: [   ]

Description	Local Qty	Lot Number	Exp. Date	Source	Unit	NDC#	Action
DTAP - SDV Daptacel (SANOFI)	8	C4452AA	11/27/2015	VFC/Federal Purchased	Dose	49281-0286-10	◑ 👁
DTAP - SDV Daptacel (SANOFI)	10	C4781AA	7/25/2017	VFC/Federal Purchased	Dose	49281-0286-10	◑ 👁
DTaP-Hep B-IPV - SYR Pediarix (GSK)	5	J9MS4	2/4/2016	VFC/Federal Purchased	Dose	58160-0811-52	◑ 👁
DTaP-Hep B-IPV - SYR Pediarix (GSK)	3	7537C	4/17/2016	VFC/Federal Purchased	Dose	58160-0811-52	◑ 👁
DTaP-IPV - SDV Kinrix (GSK)	3	23MJ7-VFCRP	10/22/2015 ⚠	VFC Replacement	Each	58160-0812-11	◑ 👁
DTaP-IPV - SDV Kinrix (GSK)	10	3N7Y7	5/27/2017	VFC/Federal Purchased	Each	58160-0812-11	◑ 👁
DTaP-IPV-Hib - SDV Pentacel (Sanofi)	4	C4679AA-VFCRP	11/6/2015 ⚠	VFC Replacement	Each	49281-0510-05	◑ 👁
DTaP-IPV-Hib - SDV Pentacel (Sanofi)	5	C4788AA	4/8/2016	VFC/Federal Purchased	Each	49281-0510-05	◑ 👁
Hep A	6	NK33P	10/9/2015 ❗	VFC/Federal Purchased	Dose		◑ 👁
Hep A	1	2B54R-VFCRP	2/12/2016	VFC Replacement	Dose		◑ 👁
Hep A	10	K019560	6/2/2017	VFC/Federal Purchased	Dose		◑ 👁
Hep B-Ped/Adol 0.5ml - SDV Engerix-B (GSK) Duplica	8	D7447	1/31/2016	VFC/Federal Purchased	Each	58160-0820-11	◑ 👁
Hep B-Ped/Adol 0.5ml - SDV Recombivax HB (Merck) D	7	H017304	7/11/2015 ❗	VFC/Federal Purchased	Each	00006-4981-00	◑ 👁
Hib-PRP-OMP - SDV Pedvax (MERCK)	2	K001124-VFCRP	10/22/2016	VFC Replacement	Dose	00006-4897-00	◑ 👁
Hib-PRP-T SDV ActHIB (SANOFI)	5	UI139AAA	3/18/2016	VFC/Federal Purchased	Each	49281-0545-05	◑ 👁
Hib-PRP-T SDV ActHIB (SANOFI)	10	UI150AAB	5/30/2016	VFC/Federal Purchased	Each	49281-0545-05	◑ 👁
HPV - SDV Gardasil (MERCK)	7	J011272	4/21/2016	VFC/Federal Purchased	Dose	00006-4045-41	◑ 👁
HPV - SDV Gardasil (MERCK)	10	K007828	3/2/2017	VFC/Federal Purchased	Dose	00006-4045-41	◑ 👁
IPV	10	K1694-1	11/26/2016	VFC/Federal Purchased	Dose		◑ 👁
MMR - SDV M-M-R II (Merck)	9	K005174-VFCRP	4/10/2016	VFC Replacement	Each	00006-4681-00	◑ 👁
MMRV - SDV Proquad (Merck)	10	K018144	4/10/2016	VFC/Federal Purchased	Each	00006-4171-00	◑ 👁
Pneumo Conjugate	17	J20343-VFCRP	5/31/2016	VFC Replacement	Dose		◑ 👁
Rotavirus - Oral 10 Pack RotaTeq (Merck)	1	K001194-VFCRP	11/6/2015 ⚠	VFC Replacement	Tube	00006-4047-41	◑ 👁
Rotavirus - Oral 10 Pack RotaTeq (Merck)	6	K001716	11/24/2015	VFC/Federal Purchased	Tube	00006-4047-41	◑ 👁
Rotavirus - Oral 10 Pack RotaTeq (Merck)	10	K023534	5/22/2016	VFC/Federal Purchased	Tube	00006-4047-41	◑ 👁

Showing 1 to 25 of 28 entries

← Previous   **1**   2   Next →

Site: GRAND LAKE FAMILY MEDICINE - 1656

Figure 128 – Current Inventory

- The vaccine inventory can also be filtered using the **Search** engine available in the upper right hand corner.

Site: GRAND LAKE FAMILY MEDICINE - 1656

Figure 129 – Current Inventory

- 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:
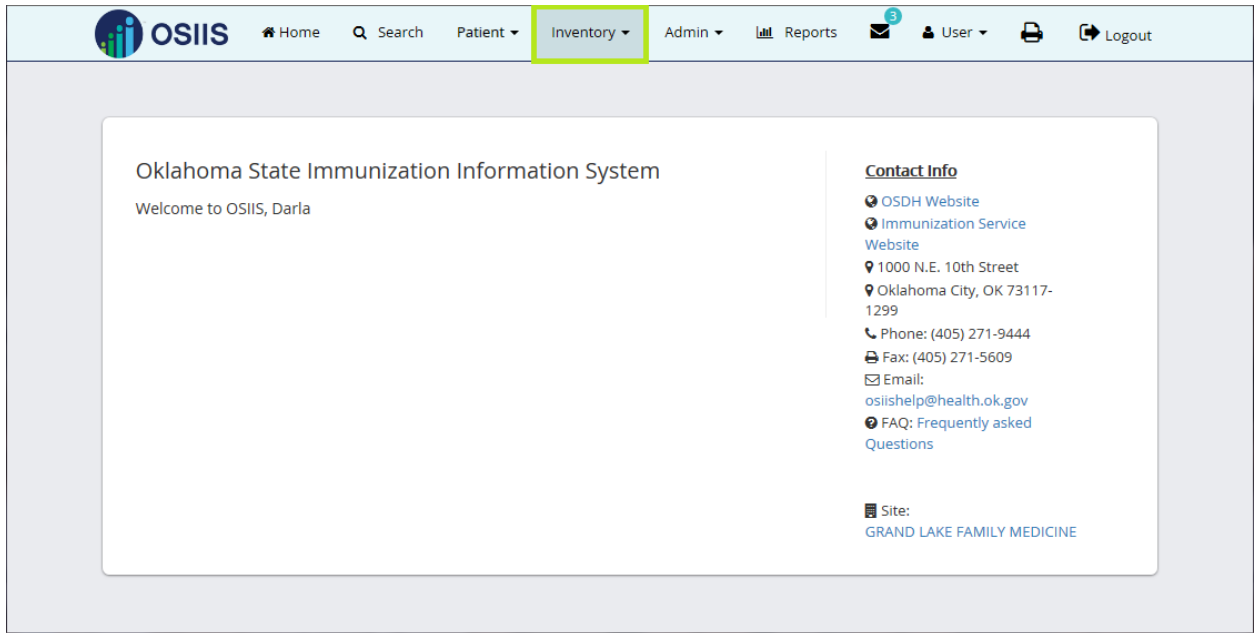
Figure 130 – Inventory

1. Click the **Inventory** tab then select **Vaccine Preferences**.
2. Users will be directed to the site **Vaccine Preferences** window

Site Inventory

Receive Shipments   Manage Inventory   Transfer   Vacc. Preferences   Vacc. Request   Add Stock

Bi-Monthly1
Your site will receive vaccine(s) on a bi-monthly basis.
Your site is on the Bi-Monthly 1 schedule. Your vaccine order will be received the third or fourth week of the following months: January, March, May, July, Sept, and November.

Vaccine Preferences

10 ⌄ records per page   Search: [   ]

CatalogID	Catalog Description	Item Description	Actions
94	DTAP	DTAP - SDV Daptacel (SANOFI)	🔧 🗑 👁
95	DTaP-Hep B-IPV		🔧 🗑 👁
96	Hib-PRP-OMP (Pedvax)		🔧 🗑 👁
97	Hib-PRP-T (ActHIB/Hiberix/Pedvax)		🔧 🗑 👁
98	HPV(Gardasil)		🔧 🗑 👁
99	FLUMIST	Influenza LAIV - Nasal FLUMIST (MEDIMMUNE)	🔧 🗑 👁
103	DTaP-IPV-Hib	DTaP-IPV-Hib - SDV Pentacel (Sanofi)	🔧 🗑 👁
104	Hep A Pediatric		🔧 🗑 👁
105	Hep A-Hep B Adult		🔧 🗑 👁
106	Hep B - Adult		🔧 🗑 👁

Showing 1 to 10 of 30 entries   ← Previous   **1**   2   3   Next →

Site: DARLAS TEST CLINIC - 331

Figure 131 – Vaccine Preferences

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 ⌄ then click the quantity to be displayed .

117

Site Inventory

Receive Shipments   Manage Inventory   Transfer   **Vacc. Preferences**   Vacc. Request   Add Stock

Bi-Monthly1
Your site will receive vaccine(s) on a bi-monthly basis.
Your site is on the Bi-Monthly 1 schedule. Your vaccine order will be received the third or fourth week of the following months: January, March, May, July, Sept, and November.

Vaccine Preferences

25 ☑ records per page   Search: [   ]

CatalogID	Catalog Description	Item Description	Actions
94	DTAP	DTAP - SDV Daptacel (SANOFI)	🔧 🗑 👁
95	DTaP-Hep B-IPV		🔧 🗑 👁
96	Hib-PRP-OMP (Pedvax)		🔧 🗑 👁
97	Hib-PRP-T (ActHIB/Hiberix/Pedvax)		🔧 🗑 👁
98	HPV(Gardasil)		🔧 🗑 👁
99	FLUMIST	Influenza LAIV - Nasal FLUMIST (MEDIMMUNE)	🔧 🗑 👁
103	DTaP-IPV-Hib	DTaP-IPV-Hib - SDV Pentacel (Sanofi)	🔧 🗑 👁
104	Hep A Pediatric		🔧 🗑 👁
105	Hep A-Hep B Adult		🔧 🗑 👁
106	Hep B - Adult		🔧 🗑 👁
108	IPV		🔧 🗑 👁
109	MEN-CONJ-MCV4(Menactra)		🔧 🗑 👁
110	MMR		🔧 🗑 👁
111	MMRV	MMRV - SDV Proquad (Merck)	🔧 🗑 👁
112	Pneumo Conjugate 13		🔧 🗑 👁
113	Pneumococcal Polysaccharide PPV23		🔧 🗑 👁
115	Rotavirus(Rotateq)		🔧 🗑 👁
116	Tdap(Adacel)		🔧 🗑 👁
117	Td		🔧 🗑 👁
118	Varicella	Varicella - SDV Varivax (Merck)	🔧 🗑 👁
123	MEN-CONJ-MCV4(Menveo)		🔧 🗑 👁
126	Hepatitis B Pediatric/Adol 0.5ml		🔧 🗑 👁
128	Hep A Adult		🔧 🗑 👁
129	Influenza 6M -35M		🔧 🗑 👁
140	Cholera Vaccine		🔧 🗑 👁

Showing 1 to 25 of 30 entries   ← Previous   **1**   2   Next →

Site: DARLAS TEST CLINIC - 331

Figure 132 – Vaccine Preferences

Search: [   ]

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

Site Inventory

Receive Shipments   Manage Inventory   Transfer   **Vacc. Preferences**   Vacc. Request   Add Stock

Bi-Monthly1
Your site will receive vaccine(s) on a bi-monthly basis.
Your site is on the Bi-Monthly 1 schedule. Your vaccine order will be received the third or fourth week of the following months: January, March, May, July, Sept, and November.

Vaccine Preferences

10 ⌄ records per page   Search: 5 ✕

CatalogID	Catalog Description	Item Description	Actions
95	DTaP-Hep B-IPV		🔧 🗑 👁
105	Hep A-Hep B Adult		🔧 🗑 👁
115	Rotavirus(Rotateq)		🔧 🗑 👁
126	Hepatitis B Pediatric/Adol 0.5ml		🔧 🗑 👁
129	Influenza 6M -35M		🔧 🗑 👁

Showing 1 to 5 of 5 entries (filtered from 30 total entries)   ← Previous 1 Next →

Site: DARLAS TEST CLINIC - 331

Site Inventory

Receive Shipments   Manage Inventory   Transfer   **Vacc. Preferences**   Vacc. Request   Add Stock

Bi-Monthly1
Your site will receive vaccine(s) on a bi-monthly basis.
Your site is on the Bi-Monthly 1 schedule. Your vaccine order will be received the third or fourth week of the following months: January, March, May, July, Sept, and November.

Vaccine Preferences

10 ⌄ records per page   Search: men ✕

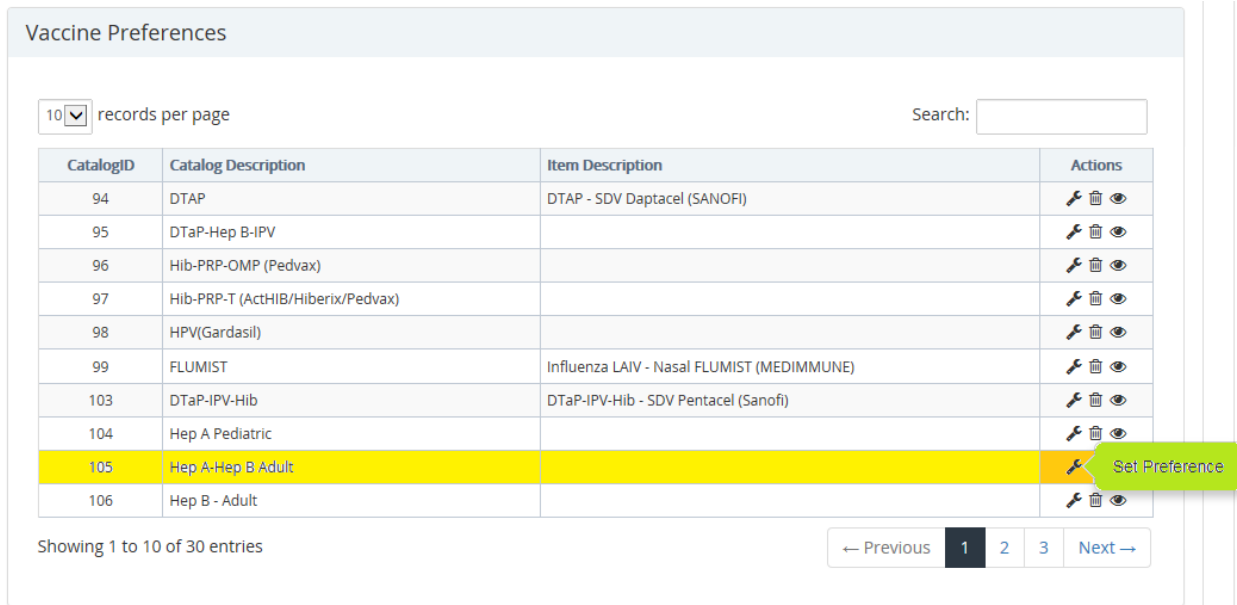| CatalogID	Catalog Description	Item Description	Actions
109	MEN-CONJ-MCV4(Menactra)		🔧 🗑 👁
123	MEN-CONJ-MCV4(Menveo)		🔧 🗑 👁
168	HIB-MenCY-MenHibrix		🔧 🗑 👁

Showing 1 to 3 of 3 entries (filtered from 30 total entries)   ← Previous 1 Next →

Site: DARLAS TEST CLINIC - 331

Figure 133 – Vaccine Preferences

119

To set a vaccine preference:

1. In the **Actions** column click the **Set Preference** icon ![wrench icon] to display the **Set Item Preference** window.

2. The previously selected preference is displayed.
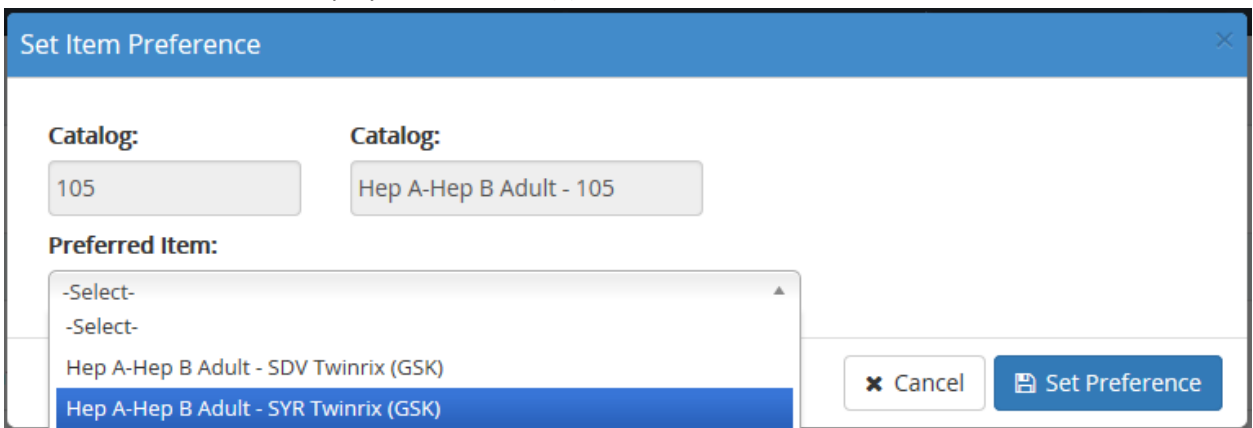
3. Click the down caret ▼ to display list of vaccine(s)

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.

Figure 135 – Vaccine Preferences

121

To view the auto order details for a vaccine:

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

Figure 136 – Vaccine Preferences

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

To delete a vaccine preference:

1. In the **Actions** column click the **Delete Preference** icon ⬛ for the vaccine to be deleted.

Figure 137 – Vaccine Preferences

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 .

Figure 138 – Vaccine Preferences

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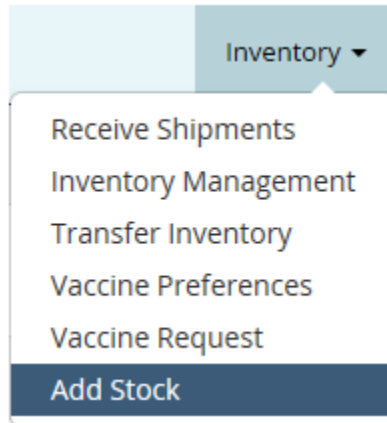
2. Users will then be directed to the **Add Stock** screen

<div align="center">**Figure 139 – Vaccine Preferences**</div>

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
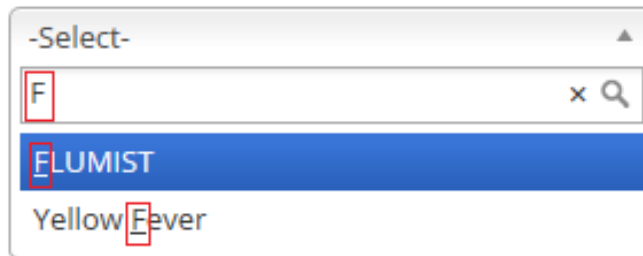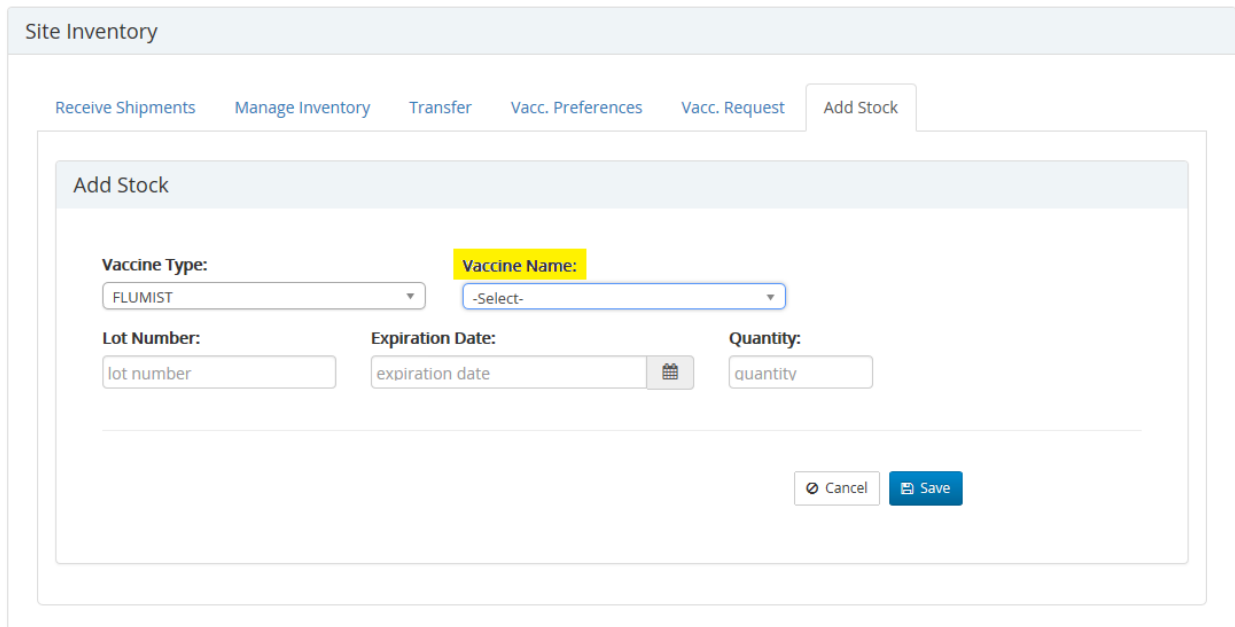
o To perform a search, type the first letter of the vaccine. Any vaccine type containing the letter will now be listed. In this example, the letter 'F' is used to locate the vaccine type **FLUMIST**.

o 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

Figure 140 – Add Stock

o Move the cursor over **Vaccine Name** to highlight, then click to select

125

Vaccine Name:

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.

Figure 141 – Add Stock

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.

126
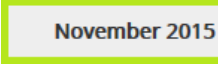
o   To use the **calendar**, click on the icon 🗓 . The current date will be displayed
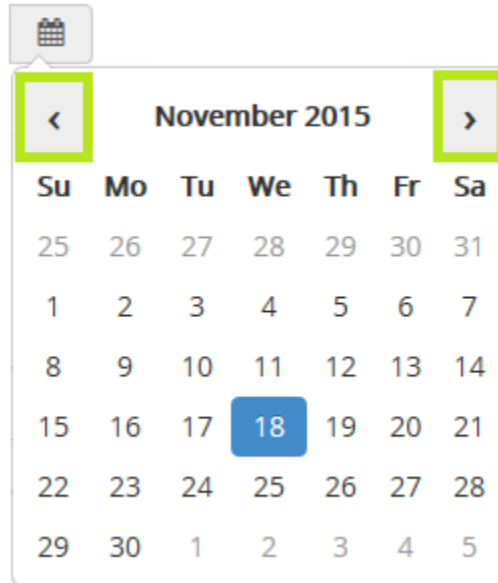
■   Use the forward or backward arrow keys to view each month.

•   Move cursor over the date to highlight. Click to select.

■   To view the current year, click on the month
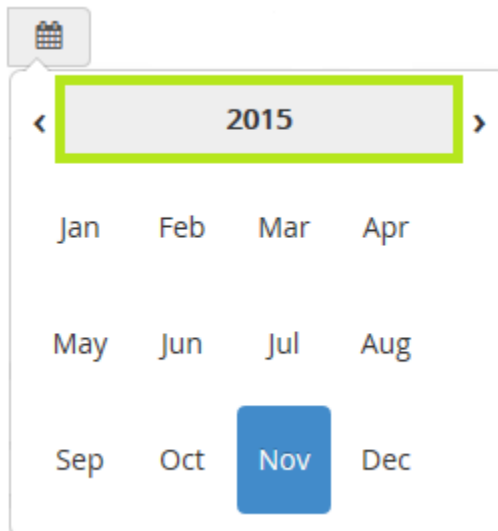
•   Move the cursor over month to highlight, click to select
•   Move the cursor over date to highlight, click to select

- To view a decade, click on the year 2015
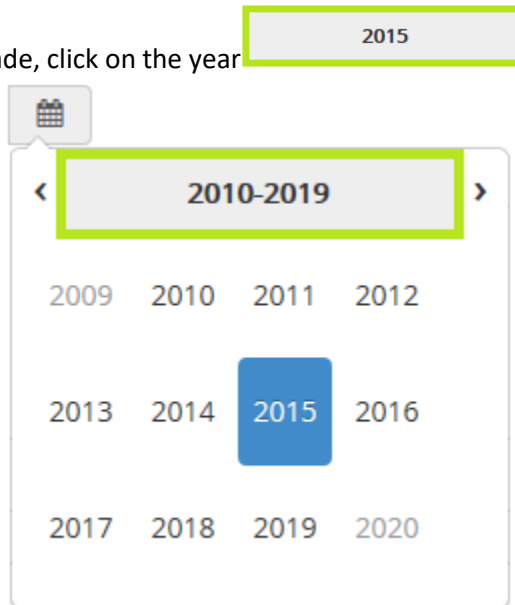
- Move the cursor over the year to highlight, click to select
- Move the cursor over the month to highlight, click to select
- Move the cursor over the day to highlight, click to select
o Click the **Quantity** field to highlight and enter the amount of vaccine to be added.
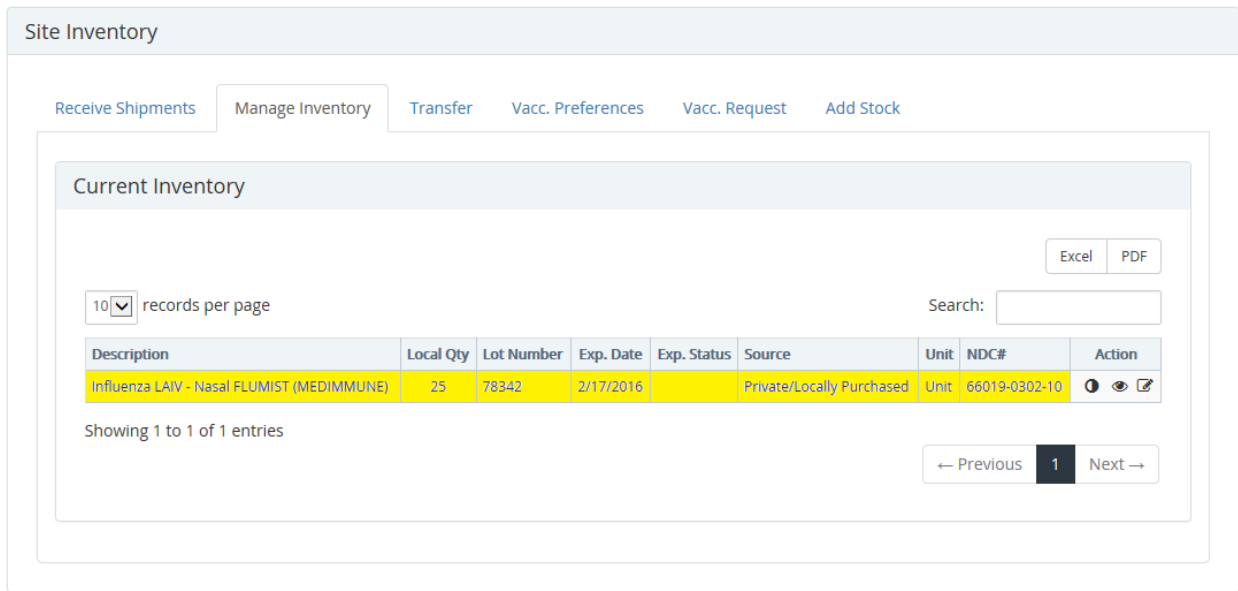
Figure 142 – Add Stock

o Click the **Save** button 🖫 Save to complete.

The newly added inventory is now visible by clicking the **Manage Inventory** tab

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:**

Figure 144 - OSIIS - Admin Module

1. Click the **Admin** tab then select **Change Sites**
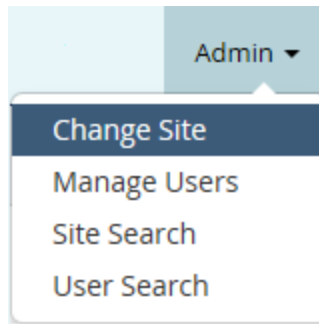
2. The **Change Site** screen allows users to select from a list of available OSIIS sites using the drop-down menu.
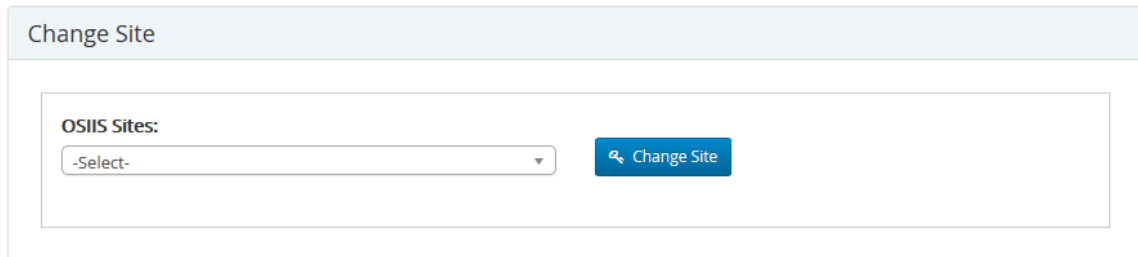
Site: JOY FAMILY MEDICINE - 2095

Figure 145 – Change Site

3. Click the down arrow ▼ to display all available sites:
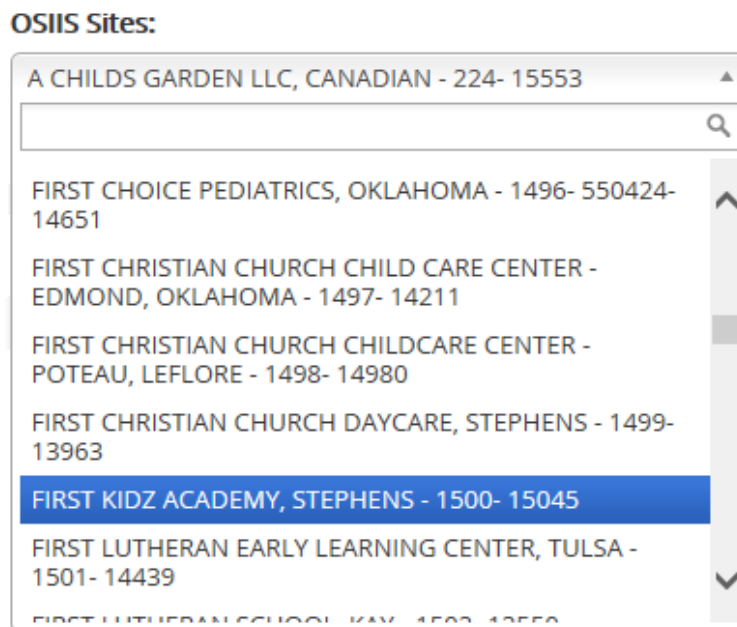
4. Use the vertical scroll bar to bring site name into viewing pane if needed. Hover the cursor over the site name to highlight and double click to select.
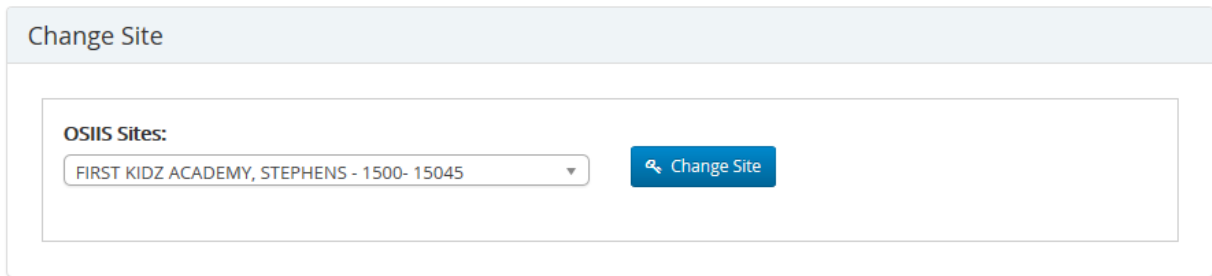
Site: JOY FAMILY MEDICINE - 2095

Figure 146 – Change Site

5. Click the **Change Site** button
   o At the confirmation message window, select the **OK** button.
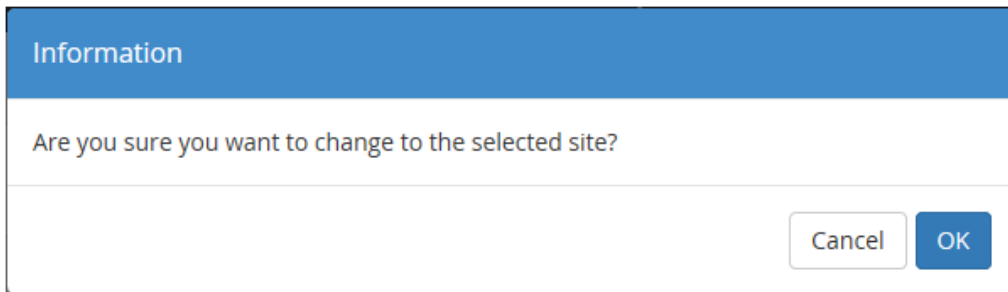
User will be directed to the **Home** screen. The newly selected Site's name will appear in the bottom right corner
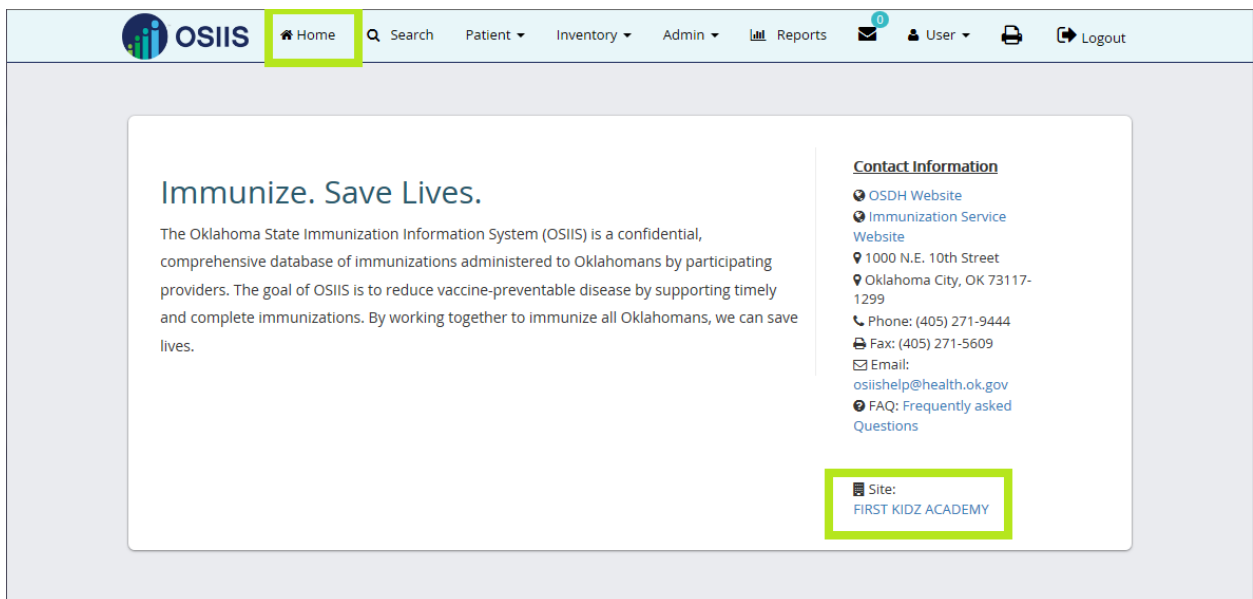
Figure 147 – Change Site

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**
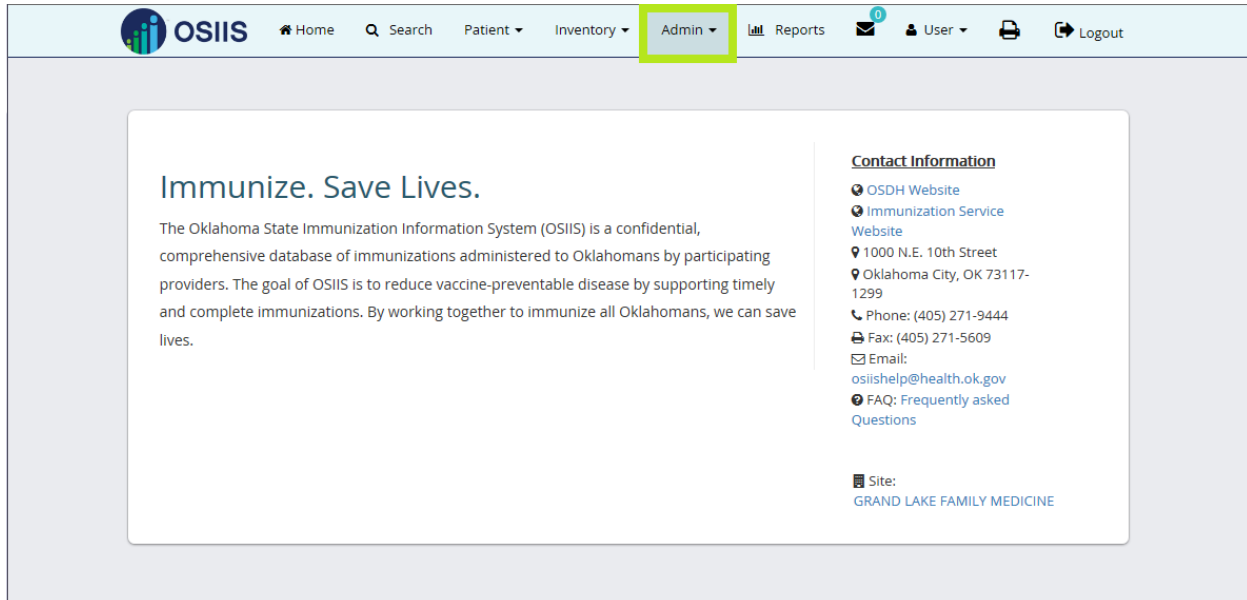
Figure 148 - OSIIS Homepage-Admin

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 ![Add User] to access the Add User screen.
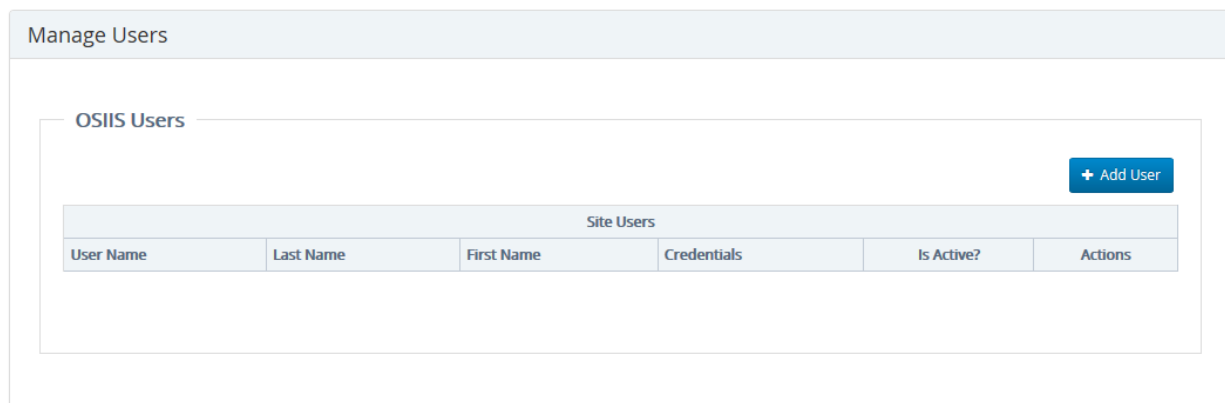
Figure 149 – Manage Users

Figure 150 – Add/Edit User

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)

133

- **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.

<p align="center">Figure 151 – Site Search</p>

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
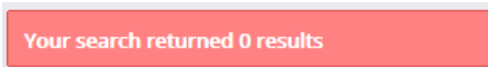
To initiate a **Site Search**:

1. Enter the **Site ID** and click the **Search** button 🔍 Search .

2. The results are displayed in the **Site Search Results** screen.

3. To return to the Site Search window, click the **New Search** button 🔍 New Search

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

Enter the **Legacy Provider ID** and select the **Search** button 🔍 Search

Site Search Results					
SiteID	Site Name	Site Type	VFCPIN	Active?	Action
3209	PERKINS FAMILY CLINIC	RHC	600010	✔	👁

Q New Search

To search using the **VFC PIN:**

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

Site Search Results					
SiteID	Site Name	Site Type	VFCPIN	Active?	Action
3159	PARTNERS IN HEALTH MULTICARE CLINIC	Private	260008		👁

Q New Search

Figure 152 – Site Search

The **Site Name**, **Site Type** and **County** fields can be used individually or collectively to locate a particular site.

135
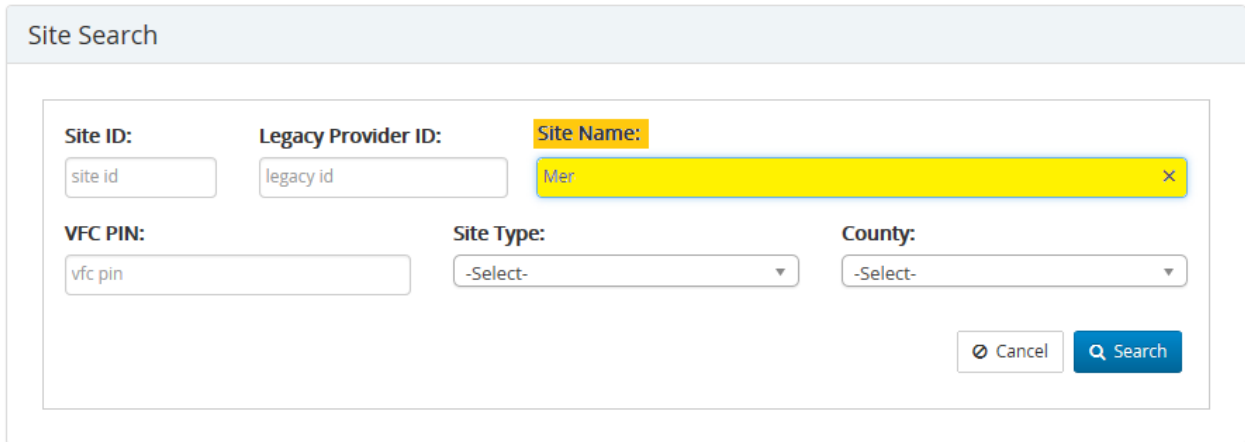
A **Site Name** search matches results to the character string entered. Any **Site Name** containing the character string is considered a possible match, resulting in several pages of site names being returned

For example:

- Enter the character string '*Mer*' in the **Site Name** field and click the **Search** button   [Q Search]

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

SiteID	Site Name	Site Type	VFCPIN	Active?	Action
297	ALEXANDER ELEMENTARY-COMMERCE	School		✔	👁
335	AMERIWORKS OCCUPATIONAL HEALTH CENTER	Private		✔	👁
536	BOOMER KIDS CLUB	School		✔	👁
641	BYNG PUBLIC SCHOOL-HOMER ELEM	School		✔	👁
658	CAMERON PUBLIC SCHOOL	School		✔	👁
659	CAMERON UNIVERSITY STUDENT WELLNESS CENTER	School		✔	👁
203	CCHDOC EMERSON CLINIC	CHD	550023	✔	👁
869	CHO-EMERGENCY ROOM	Hospital-Private			👁
931	CHRIST THE REDEEMER EARLY CHILDHOOD CENTER	Child Care			👁
1014	COMMERCE HIGH SCHOOL	School			👁

Figure 153 – Site search

136

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**
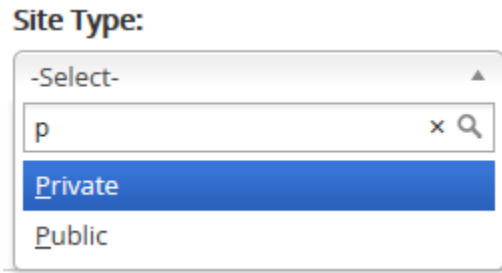
3. Click the **County** field. Type the letter *'o'* to truncate the **County** list. Click to highlight **OKLAHOMA**
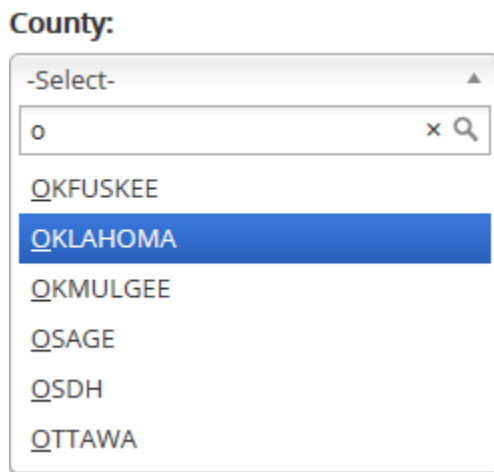
4. Click the **Search** button to display the results
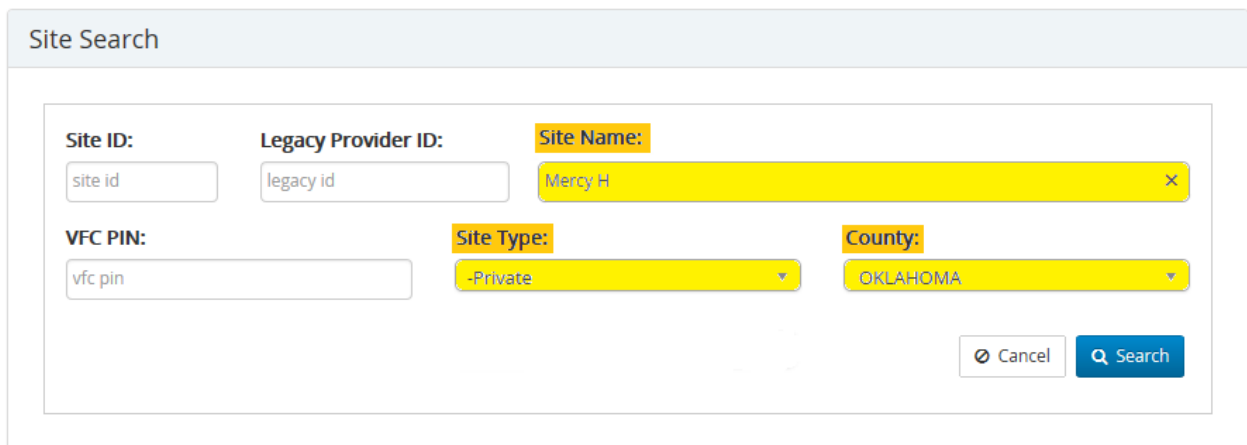
<div align="center">**Figure 154 – Site Search**</div>

The **Site Search Results** are more manageable:

Site Search Results					
SiteID	Site Name	Site Type	VFCPIN	Active?	Action
2623	MERCY HEALTH EDMOND - RANKIN	Private	550450		👁
2624	MERCY HEALTH EDMOND - SANTA FE	Private	550216	✔	👁
2625	MERCY HEALTH EDMOND MEMORIAL	Private	550102	✔	👁
2626	MERCY HEALTH EDMOND WESTBROOK	Private	550317	✔	👁
2629	MERCY HEALTH NORTH MAY	Private	550190	✔	👁
2630	MERCY HEALTH NORTH MERIDIAN	Private	550169		👁
2631	MERCY HEALTH NORTHWEST FAMILY	Private	550230		👁
2632	MERCY HEALTH QUAILBROOK	Private	550316		👁
2634	MERCY HEALTH SIGNAL RIDGE	Private	550266	✔	👁

Q New Search

Figure 155 – Site Search

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.

Figure 156 – User Search

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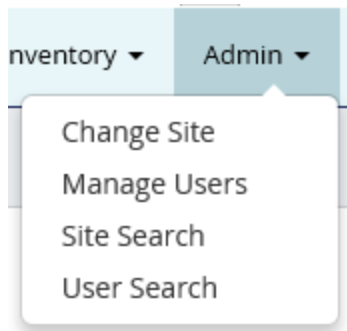
The **User Name** is a unique character set within the OSIIS database and when used as a search parameter, it will return a single user record

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.

User Search Results

	User Search Results			
UserName	**Last Name**	**First Name**	**IsActive**	**Actions**
aknoche	KNOCHE	AMY	true	👁
osdh\AmyM	MAULDIN	AMY	true	👁
MCQUAY33	MCQUAY	AMY	true	👁
osdh\AmyCM	MILLER	AMY	true	👁
TAMYUMI	MILLER	TAMYU	true	👁
osdh\AmyDN	NEASE	AMY	true	👁
anugent	NUGENT	AMY	true	👁
APEDLOW	PEDLOW	AMY	true	👁
POPHAM	POPHAM	AMY	true	👁
osdh\AmyLP	PUMPER	AMY	true	👁

Prev 1 2 **3** 4 5 Next

🔍 New Search

Figure 157 – User Search

Using as many characters as possible **and** using both the **Last Name** field and **First Name** field greatly reduces the number of returned results.

User Search

User Key:	Last Name:	First Name:	UserName:
user key	M	Amy	username

⊘ Cancel   🔍 Search

The number of records found matching a **Last Name** with the character *M* and **First Name** with characters *Amy* is ten (10).

Figure 158 – Site Search

Clicking the **View** icon 👁 allows the **User Profile** for that patient to be displayed

Figure 159 – User Profile

Select the **Back** button 🔙 Back   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 🔍 New Search ,or select **Admin→ User Search** from the OSIIS toolbar.

If the user search is unable to locate any matching records, a message indicating zero results is briefly scrolled onto the

Your search returned 0 results.

top, right corner of the screen.

Reports

Report	Description
Active Providers Report	• 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). • There are no parameters needed for this report.
Clinic Volume Assessment Report	• 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. • The parameters are set by the end user and there is no limit to the number of months the report can be run. • 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.
CoCASA Text File Generator	• 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. • 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. • Reports available in CoCASA include: adolescent coverage, invalid dose, missed opportunities, need one dose, diagnostic childhood report, etc.

Daily Possible Duplicate by Site	• 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.
	• There are no parameters needed for this report.
	• 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.
Doses Administered	• 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.
	• 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.
Find Patient by Lot Number	• 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.
	• 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.
	• The report will list the patient's last name, first name, middle, birth date, vaccine name, given date, lot number, and given by information.
	• The report will also count the number of doses of that lot number given within the entered time frame.
Idle Sites	• The purpose of this report is to list the providers that have had no data entry into OSIIS for 30 or more days.
	• This report assists VFC and OSIIS staff with identifying those providers that may no longer need access to OSIIS.
Immunization Activity – Time Range 2 Months	• 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.

	• This report includes patient identifying information, vaccine type, lot number, vaccinator, dose number, and VFC eligibility.
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 the 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.

	• The report parameters include individual vaccine types or all of them, patient age, and vaccine schedule status. • The report lists the patient Id, last, first and middle name, dob, address, and phone number.
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.

	• The report will also show vaccines that have expired in red and vaccines expiring within 30 days in orange.
Student Immunization Report	• 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

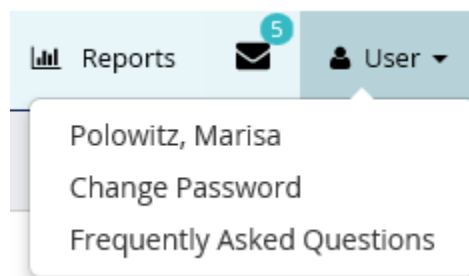| OSIIS Notifications Icon	Left click on icon to access message window.	Advises users of number of pending notifications using four icons
		System
		Web User
		Site
		Shipping

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)**

Figure 160 – User Profile

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 [Back] 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**

149
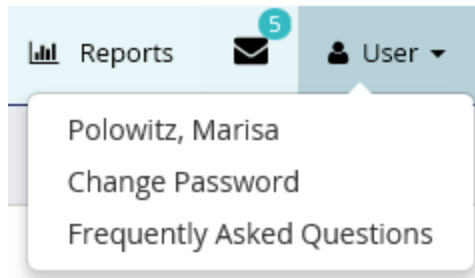
The FAQ screen is composed of questions commonly asked by OSIIS users and their appropriate responses.

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

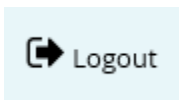To close a FAQ, click again on either the underlined question or underlined arrow.

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.