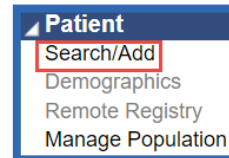# Searching, Adding & Editing Patients
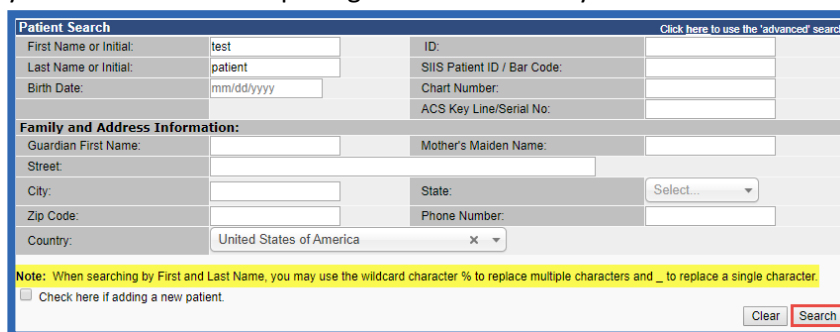
How Can I Search for a Patient?

1. Login to the IIS and select your organization and facility if indicated.
2. Click **Search/Add** under the **Patient** heading in the left navigation menu.
3. Enter search criteria using the tips below.
4. Click the **Search** button or press **Enter**.

Search Tips

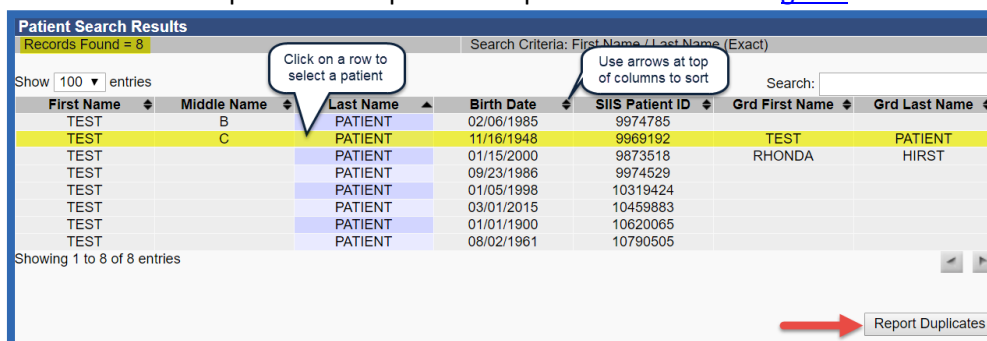There are several ways to search for patients, including:

- Patient's first name, last name, and birth date.
- First initial of the patient's first or last name and birth date.
- Patient's first and last names without the birth date.
- **Chart Number**: You can search this way if your organization/facility sends data from your electronic health record (EHR) to the IIS.
- **Wildcard Character** (e.g. % or _): You can replace letters in the patient's first and last names if you are unsure of the spelling or need to widen your search.

How Can I Select a Patient?

1. Click the patient's name under **Patient Search Results** to select the patient and view their demographic information.
2. If you see two records for the same patient, click on the **Report Duplicates** button at the bottom of the screen to report them as possible duplicates. Refer to this guide for instructions.

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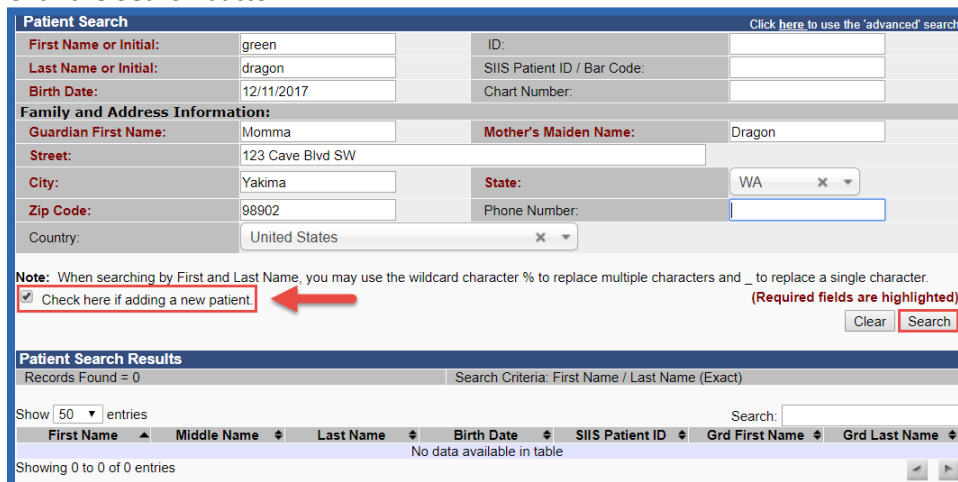
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> **Other Tips:**
> - The Department of Health uploads birth data to the IIS weekly, so all children born in Washington State have a record in the system.
> - Enter birth dates as a string of numbers (e.g. 050805 for May 8, 2005) or select from the calendar pop-up window.
> - The maximum number of search results is 250 records. If you do not see your patient, narrow the criteria and search again.

How Can I Add a Patient to the IIS?

If your patient was born in another state or does not have a record in the system, you will need to add them to the IIS.

1. Try multiple search methods using the search tips above.
2. If no matching patient exists, check the box that says, "**Check here if adding a new patient.**"
3. Enter all the required information (highlighted in red), including: First Name, Last Name, Birth Date, and Address. Guardian First Name and Mother's Maiden Name are required for patients under 19.
4. Click the **Search** button.
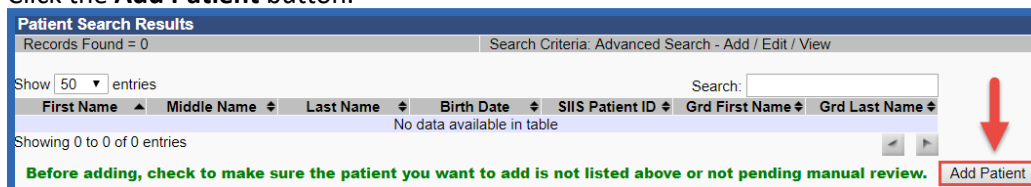
5. After clicking the search button, a warning message in green will appear in the **Patient Search Results** section.

6. Click the **Add Patient** button.

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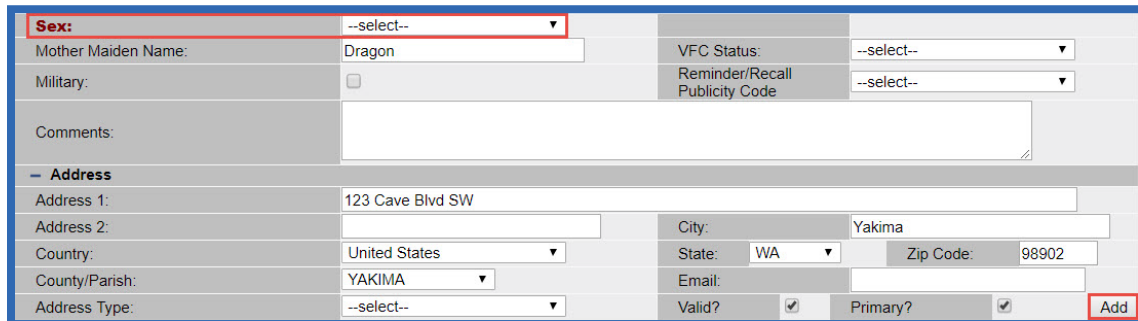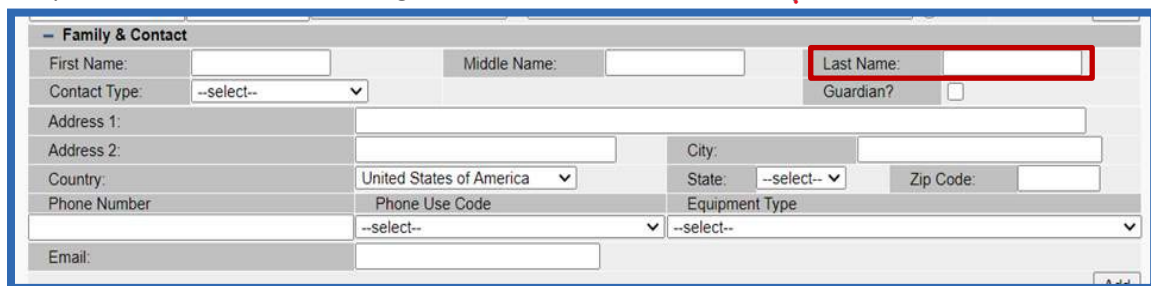
7. After clicking **Add Patient**, the **Patient Demographics Edit** screen opens.

8. Select the patient's **Sex** from the drop-down box.

9. Under the **Address** section, click the **Add** button. Click **OK** to the pop-up message that asks if you want to mark this address as primary.

10. For patients under 19, enter the guardian's last name in the **Family & Contact** section.

11. Add all available patient demographic information (e.g. VFC Status, phone number, race, ethnicity). *Even if a field is not required, it is very important to capture as much demographic information as possible.*

12. Click the **Save** button at the bottom right of the screen.

How Can I Edit Patient Demographics?

1. Search for and select a patient to open the **Patient Demographics** screen.
   - Click the **Edit** button at the bottom of the screen.

2. Add or edit patient information:
   - **Patient Status:** Mark a patient as active, inactive, or deceased. The options in the drop-down are more limited if your organization is not set up to own patients in the IIS.

Tip: Use ➕ and ➖ symbols to the left of each section heading to expand or collapse a section.

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- **Race and Ethnicity**: Select patient race and ethnicity from the drop-down menus.
- **Language:** Select the patient's primary language from the drop-down.
- **Birth Order:** Select single birth or the correct number from the drop-down if the patient is a twin, triplet, etc.
- **VFC Status:** For patients under 19, select the appropriate patient eligibility status.

3. Add, edit, or remove an address
   - Add or update address fields (e.g. address, city, zip).
   - Mark the **Primary** check box to make this the patient's main address and click the **Add** button. Click **OK** to close the pop-up message.

   - Click the **Edit** button to modify an address. A pop-up message will remind you to click the **Update** button when done editing the address. Click **OK** to close the pop-up.
   - Edit the address information and click the **Update** button.
   - Click the **Remove** button to remove a patient's address. Click **OK** to close the pop-up message verifying that you want to delete the address.
   - Always click the **Save** button at the bottom of the screen after adding, editing, or removing information.
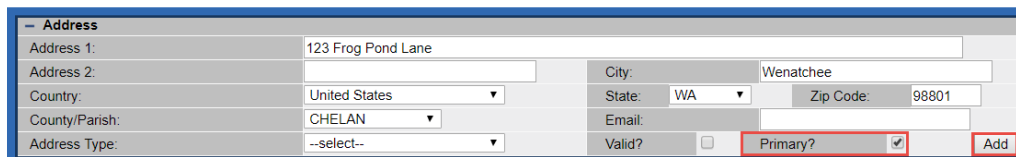
4. Add, Edit, or Remove a Phone Number
   - Enter the phone number and add an extension, if needed.
   - Select **Phone Use Code** and **Equipment Type** from the drop downs.
   - Select the **Primary** radio button to mark a patient's phone number as primary.
   - Click the **Add** button.

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— Patient Phone Number(s)					
Phone Number	Extension:	Phone Use Code	Equipment Type	Primary	
(512)333-4133		Primary residence numbi ▼	Cellular phone ▼	◉	Add

- Edit or remove a phone number using the **Edit** and **Remove** buttons.
- Always click the **Save** button at the bottom of the screen after adding, editing, or removing information.

5. Add, edit, or remove family & contact information
   - Enter the guardian's first and last name. You can list more than one guardian.
   - Enter the guardian's phone number, if needed.

— Family & Contact				
Guardian 1 First:	FIRE			
Guardian 1 Middle:			Guardian 2 First:	
Guardian 1 Last:	DRAGON		Guardian 2 Last:	
Phone Number		Phone Use Code		Equipment Type
		--select-- ▼		--select-- ▼

- Edit family & contact information by typing different names in the guardian fields. Remove a contact by deleting names from the guardian fields.
- Click the **Save** button at the bottom of the screen after adding, editing, or removing a guardian.

6. You can also add or edit the following optional information
   - **Alias**: Enter a nickname, maiden, second last name, or preferred name and then click **Add.** The system uses this information when searching for a patient.
   - **Secondary Patient Demographics**: Document patient allergies and other household information here.
   - **School Information**: Enter the school the patient attends and their date of entry.
   - **Medical Home**: Enter the patient's primary physician (if your clinic manages physicians/vaccinators in the IIS). You can also see your clinic's chart number in this section if you send electronic data from your EHR to the IIS.
   - **Birth & Death**: Enter a patient's birth location. If you mark a patient as deceased using the **Patient Status** drop-down at the top of the **Patient Demographics Edit** screen, you can add a date of death in this section.
   - Click the **Save** button at the bottom of the screen after making edits.

> *It is very important to capture as much demographic information as possible. Not all fields are required however it is best practice to include all patient demographic information available.*

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

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