RESOURCE AND PATIENT MANAGEMENT SYSTEM

Immunization Module

(BI)

User Manual

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Office of Information Technology
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Preface

This manual provides instructions for using the Resource and Patient Management System (RPMS) Immunization Module properly. It describes all processes and procedures involved in collecting and managing the immunization data of patients, and the specific steps involved in setting up and customizing the software.

1.0 Introduction

This manual describes the use of the Indian Health Service (IHS) RPMS Immunization Module v8.5. It is designed to aid healthcare staff and computer personnel in the use of the Immunization module. While there is context-sensitive on-line help available at all prompts by typing **?**, this manual provides a more organized presentation of the features of the software.

2.0 Orientation

2.1 System Overview

The **RPMS Immunization Module** provides a means to track and recall patients for immunizations, to provide feedback to the providers and administrators about immunization rates in their patient population, and to share immunization information with authorized agencies.

Any patient whose immunizations are to be forecast must first be registered in the main patient database through the RPMS Registration Module. Immunization data for all registered patients is stored with all other patient medical information in the **Patient Care Component (PCC)** files. Registered patients are automatically added to the Immunization Registry as either **Active** or **Inactive**. The status of Active is most relevant for young children. Active patients in the Immunization Registry are those whose immunizations are tracked at the site, and for those younger than 36 months, the Active status determines who is included in the childhood immunization reports. Children younger than 36 months of age residing in a facility's GPRA community are automatically added as Active in the Immunization Registry. Patients can be changed to Inactive status if they move or go to another provider.

The RPMS Immunization Module is composed of a main menu with options available in three submenus. An option is selected by typing the option name or the option's 3-character abbreviation (in the column to the left of the option name) and then pressing Enter. Options on the submenus are grouped by the type of function they perform. Some screens also display options at the bottom of the screen to perform operations on the information presented on the screen.

Not all options and actions are available to all users. Options and actions that require special knowledge or display confidential information may be locked with keys that are given only to certain staff, such as the program manager. If an option or action described in this user manual does not appear on your screen, this may be because you do not have the key to that particular option. If you have questions regarding locked options and actions, or questions in general regarding how to navigate through RPMS menus, contact your site manager.

2.2 Menu System

The main entry point to the RPMS Immunization Module is the **Immunization Menu** option. This option may also appear as the synonym **IMM**. Contact your computer-support staff for help in locating the **Immunization Menu**. The version of the package and current patch number is located at this entry point. In addition, the vaccine table patch number is located under the version and package patch number. The **RPMS Immunization Main Menu** provides the three main options illustrated in Figure 2-1.

```
                    .. --- ..          *     *          .. --- ..
                 *          ~ *.      \   /      .* ~          *
               *               *      \ /     *                *
              (         RPMS      *    (|)    *     Version       )
               *    IMMUNIZATION    *  ***  *         8.5*24     *
                 *.                    *   *          *1007   .*
                   *                   *    *                 *
                     >                 *    *              <
                    *                   *   *               *
                  *                  * *    * *                *
                 *     @        *    *    *   *        @     *
                (           *      *   *      *            )
                 *.         *          ***          *       .*
                   / /-- ~              ~             ~ --\ \

                     MAIN MENU at INDIAN HOSPITAL


    PAT     Patient Menu ...
    REP     Reports Menu ...
    MGR     Manager Menu ...

Select Immunization Menu Option:
```

Figure 2-1: Immunization Module Main Menu

2.2.1 Patient Menu

The Patient Menu includes three options used to manage patient immunization information.

- The **Single Patient Record** option allows you to perform the following tasks:
  - Activate or inactivate a patient in the Immunization Registry.
  - Enter, edit, or delete current or historical immunizations or skin tests.
  - Enter, edit, or delete immunization adverse events or contraindications.
  - View a more complete immunization history and future forecast (**ICE Forecaster** profile).
  - Document consent to participate in a State Immunization Registry.
  - Print a Health Summary or Official Immunization Record for a patient.
  - Print a Due Letter for a patient.
- The **Print Individual Patient Letter** option allows you to view and print any of the customized letters that have been set up (including the Official Immunization Record) for a patient.
- The **Patient Lists and Letters** option allows you to select groups of patients by age range, active status, community, immunizations due, immunizations received, lot numbers, and other criteria. You can also print a master list of the patients in a group or send a selected letter to a group of patients.

- The **View Single Patient State Record** option allows you to query for a patient's immunization history from the State or send a patient's immunizations to the State.

2.2.2 Reports Menu

The Reports Menu allows you to generate the following standard reports:

- **Adolescent Report**–Presents immunization rates for patients 11 years 0 months through 17 years 11 months.
- **Adult Report**–Presents immunization rates for patients 19 years and older.
- **COVID Report**–Presents immunization rates for patients from less than 2 years through 75 years and older.
- **Eligibility Report**–Presents doses administered along with the patient eligibility recorded for that visit
- **Influenza Report**–Presents immunization rates for influenza vaccination for all ages.
- **3-27 Month Report**–Presents age-appropriate immunization rates for 3 to 27-month-old children.
- **Two-Yr-Old Rates Report**–Presents age-specific immunization rates for 19- to 35-month-old children listed as Active in the Immunization Registry, including the 4-3-1-3-3-1-4 series rate (4 DTaP, 3 Polio, 1 MMR, 3 Hib, 3 Hep B, and 1 Varicella, 4 PCV) used for Healthy People 2020 and GPRA objectives.
- **Vaccine Accountability Report**–Presents doses administered for a given time period by age group, series and lot number
- **H1N1 Accountability Report**–Presents H1N1 doses administered for a given time period by age group and vaccine type. Also reports number of first doses and number of second doses.
- **PCV Report**–Shows PCV13 vaccine usage by age group and time period.

2.2.3 Manager Menu

Managers use the options in this menu to perform such functions as adding and editing form letters, editing site parameters, re-standardizing the vaccine table, and exporting immunizations in flat ASCII text. The Manager Menu is locked and is only available to those who hold the **Manager** key.

2.3 Menu Diagram

```
     *  PATIENT MENU  *
SGL     Single Patient Record
LET     Print Individual Patient Letter
LLS     Patient Lists and Letters
VST     View Single Patient State Record
     *  REPORTS MENU  *
ADO     Adolescent Report
ADL     Adult Report
COV     COVID Report
ELI     Eligibility Report
FLU     Influenza Report
H1      H1N1 Accountability Report
PCV     PCV Report
QTR     3-27 Month Report
TWO     Two-Yr-Old Rates Report
VAC     Vaccine Accountability Report
     *  MANAGER MENU  *
ERR     Edit Patient Errors
CMG     Add/Edit Case Manager
CMT     Transfer a Case Manager's Patients
SCN     Scan For Patients
        ------------------------------
ESP     Site Parameters Edit
PKG     Package Setup Information
LET     Form Letters Add/Edit
LOT     Lot Number Add/Edit
VAC     Vaccine Table Edit
ELI     Eligibility Table Edit
RES     Restandardize Vaccine Table
EXP     Export Immunizations
KEY     Allocate/Deallocate Imm Menu Keys
NDC     NDC Code Add/Edit
XVT     Export Vaccine Table to Excel File
PER     Performance Test Imm Forecaster
```

Figure 2-2: Diagram of Main Menu

2.4 Case Managers and the Program Manager

The Case Manager is the individual identified to manage the patient's immunization information. This can include immunization tracking and recall, entering or editing patient data, selecting appropriate letters, scanning for delinquent needs, and more.

The Program Manager or immunization coordinator is the person chiefly responsible for the setup and operation of the RPMS Immunization Module at a given site. This person works with the computer site manager on the technical aspects of the software and performs maintenance tasks that require a more detailed understanding of the software than is required of case managers. At small sites, the program manager may also be the only case manager. (This individual is assigned the **BIZ MANAGER** key by the site manager).

2.5 Immunization Calculation Engine (ICE) Forecasting Program

IHS integrates the forecasting software into RPMS that is from **HLN Consulting**. The ICE Forecaster is a rule-based software that evaluates immunization histories and determines due dates. ICE contains immunization logic for routine childhood and adult immunizations. All the immunization schedules available through ICE conform to the **ACIP recommendations**. See ICE–Confluence (atlassian.net) for more information.

2.6 Conventions in the Software and Manual

The Resource and Patient Management System (RPMS) has established certain terms and operating procedures (conventions) for the Immunization Module. The following section describes these conventions to help you learn how to use the system quickly. As you read the following explanations, refer to your keyboard to ensure that you can correctly identify each key and command function.

2.6.1 The Enter Key

At many points in this manual, you are instructed to type some letters and press the **Enter** key (**Press Enter**). The **Enter** key refers to the key on your keyboard labeled **Enter** or **Return**. (Most PC computer keyboards have an **Enter** key rather than a **Return** key. On electric typewriters, this was the carriage return key). If you see **[RET]** or an instruction to **press Return** or **press the Return key**, press the **Enter** key.

2.6.2 Double Slash (//) n

RPMS software requests user input by asking a question or directing you to select an answer at a prompt. As shown in Figure 2-3, when the prompt is followed by a suggested response and **double slashes (//)**, the suggested response before the two slashes is the default answer for that question.

```
A  Add Immunization        D  Delete Visit          P  Patient Edit
S  Skin Test Add           R  Report Text           C  Contraindications
E  Edit Visit              H  Health Summary        L  Letter Print
Select Action: Quit//
```

Figure 2-3: Select Action prompt with Default Answer (Quit)

- To select the **default answer** without retyping it, press Enter.
- To use a different option, type the **option** after the **double slash (//)** and press Enter.

  For example, to edit a visit at the prompt in Figure 2-3, type **E** at the **Select Action:** prompt.

- If a prompt has a default answer but you want the response to be blank, you can delete the default answer or type **@** at the prompt.

2.6.3 Screen Captures

A bold, black, blinking cursor in a screen capture (Figure 2-4) indicates a user action. After every entry that you type, you must press the **Enter** key to create the entry. If the screen capture displays only the two **double slashes (//)** without any bold type, press the Enter key without entering anything.

```
    IMMUNIZATION v8.5          *  PATIENT MENU  *     Site: INDIAN HOSPITAL
                               ==================     User: USER,JOHN


    SGL    Single Patient Record
    LET    Print Individual Patient Letter
    LLS    Patient Lists and Letters
    VST    View Single Patient State Record

 Select Patient Menu Option:
```

Figure 2-4: Screen Capture with Bold Cursor example

2.6.4 Online Help

Online help is available for most menu options and data entry prompts. Typing a single **question mark (?)** at the data entry prompt produces instructions for entering requested data. Typing two **question marks (??)** displays a more complete message. Some prompts display a list of available choices. If at any time you are not sure how to answer a particular question, or if you want to know more about the menu choices, type a single **question mark (?)** to display more information.

2.6.5 Backspace and Arrow Keys

The **Backspace** key moves the cursor to the left, erasing characters as it moves. The **Up** and **Down** arrow keys move you to fields above and below the current location of the cursor. The **Left** and **Right** arrow keys generally are not used. If you are having problems with these keys, contact your site manager.

2.6.6 The Up-Hat (^)

The **Up-Hat**, also known as the **caret (^) (Shift+6)**, is a special control character. Use it to exit from a particular activity or data entry sequence. Typing the **Up-Hat (caret)** at any prompt usually returns you to the preceding prompt or menu level. It can also be used to exit from long data displays, such as vendor lists, that require many screens.

Activate the **Up-Hat** by pressing the **Shift** key and the **6** key located at the top of the typewriter keyboard together. Pressing the **Shift** key and the **6** key on the numeric keypad does not create a **"^"** character.

2.6.7 The Select Device Prompt

When the software is ready to display a list or report, it displays the **Select Device** prompt. To send the report or list to a printer, type the **printer name** or **number**. To display the report or list on your screen, type **HOME (or 0)**. For help in answering the **Select Device** prompt, contact your site manager.

Some reports allow you to type **Q (for Queue)** at the **Device** prompt. This enables you to send a report to a printer and then returns you immediately to your screen while the report is printing, rather than waiting for the report to finish. This is helpful if the report takes a long time to run (search) or print. After typing **Q**, the system displays the **Queue To Print On Device** prompt. At this point, enter the name of the printer on which you want to print the report.

Another option is to use a terminal-emulation software that allows you to log your session. Once you do this then at the device prompt, type **HOME;130;999999999** and press Enter. This will record the information in the saved session file.

2.7 ListMan Screen Displays

The RPMS Immunization Module v8.5 makes extensive use of **ListMan** screens to display information and to allow the user to perform actions on the information presented. Figure 2-5 shows a typical **ListMan** screen.

```
PATIENT VIEW (IMM v8.5)    May 23, 2022 11:11:32          Page:    1 of    5

 Patient: DEMO,PATIENT BABYBOY       DOB: 02-Feb-2017 (5 yrs)
  Chart#: 896532 at INDIAN HOSPITAL |     Active   Male    M HBsAg: UNK

  #  Immunization History                  |   Immunizations DUE on 05/23/2022
  1  04/25/17  DTaP                   2021 |     DTAP,NOS    due
  2  06/05/17  DTaP                   2021 |     POLIO,NOS   due
  3  07/03/17  DTaP                   2021 |     MMR         due
  4  02/05/18  DTaP                   2021 |     FLU,NOS     due
                                           |
  5  04/25/17  POLIO,NOS              2021 |   Last Letter: None
  6  06/05/17  IPV                    2021 |
  7  09/01/18  POLIO,NOS              2021 |-----------------------------------
                                           |   * CONTRAINDICATIONS/REFUSALS *
  8  03/19/17  HIB,NOS                2021 |
  9  04/16/17  HIB,NOS                2021 |  COV,PfrPed: Anaphylaxis
 10  05/14/17  HIB,NOS                2021 |
+         Scroll down to view more. Type ?? or Q to QUIT.
A  Add Immunization       D  Delete Visit           P  Patient Edit
S  Skin Test Add          R  Report Text            C  Contraindications
E  Edit Visit             H  Health Summary         L  Letter Print
```

Figure 2-5: ListMan screen

ListMan screens include the following three areas:

Header Area

The **Header area** is a fixed (non-scrollable) area that displays the title of the screen and demographic information for a specific patient (in Figure 2-5, the lines beginning with **Patient** and **Chart**).

List Area

The **List area** displays a list of items, such as **Immunizations** or **Date of Forecast**, on which you can take action. If all the items do not fit on one page, you can press the **Up** or **Down** arrow keys to scroll the list. If there is more than one page of items, the page number is displayed in the upper right corner of the screen (**Page 1 of #**).

Action Area

The **Action area** contains three elements–the **message line**, a **list of actions**, and the **Select Action** prompt.

- **Message Line:** This line displays a **plus sign (+)**, a **minus sign (-)**, a **string of periods (...)**, or an **informational statement** (for example, **Type ?? for more actions**.).

- To display the next page of the list, type a **plus sign (+)** at the **Select Action** prompt.
- To display the previous page of the list, type a **minus sign (-)** at the **Select Action** prompt.

> **Note:** The **plus (+)**, **minus (-)**, and **greater than (>)** signs are only valid actions if they are displayed on this message line.

- **List of Actions:** The actions that are currently available.
  - To perform an action in the list, type the **letter** of the action at the **Select Action** prompt and press **Enter**.
  - To see a list of additional actions, type **double question mark (??)** at the **Select Action** prompt.
- **Select Action Prompt:** At the **Select Action** prompt, type the **name** or **abbreviation** of an option and press **Enter** to perform one of the following actions:
  - Browse through the list.
  - Select items that need action.
  - Take action against those items.
  - Select other actions without leaving the option.

2.7.1 Generic Actions

In addition to the actions specific to the **ListMan** screen, the system provides generic hidden actions applicable to all ListMan screens. To view these generic actions, type a **double question mark (??)** at the **Select Action** prompt. Table 2-1shows the abbreviation for each action in brackets following the action name.

Table 2-1: ListMan Actions and Descriptions

Action	Description
Next Screen [+]	Move to the next screen (may be shown as a default)
Previous Screen [-]	Move to the previous screen
Up a Line [UP]	Move up one line
Down a Line [DN]	Move down one line
Shift View to Right [>]	Move the screen to the right if the screen width is more than 80 characters
Shift View to Left [<]	Move the screen to the left if the screen width is more than 80 characters
First Screen [FS]	Move to the first screen
Last Screen [LS]	Move to the last screen

Action	Description
Go to Page [GO]	Move to any selected page in the list
Re Display Screen [RD]	Redisplay the current screen
Print Screen [PS]	Prints header and portion of the list currently displayed
Print List [PL]	Prints the list of entries currently displayed
Search List [SL]	Finds selected text in list of entries
Auto Display (On/Off) [ADPL]	Toggles the menu of actions to be displayed/not displayed automatically
Quit	Exits the screen (may show as a default)

3.0 Patient Menu

Figure 3-1 shows the Patient Menu screen, which is a submenu of the Main Menu (Figure 2-1). The Patient Menu provides access to the basic tracking and recall functions of the **Immunization module** software.

To display the **PATIENT VIEW** screen (Figure 3-2), type **PAT** at the **Select Immunization Menu Option** prompt.

The following options appear on the Patient Menu:

- **SGL:** Single Patient Record
- **LET:** Print Individual Patient Letter
- **LLS:** Patient Lists and Letters
- **VST:** View Single Patient State Record

```
IMMUNIZATION v8.5          *  PATIENT MENU  *     Site: INDIAN HOSPITAL
                           ==================     User: USER,JOHN


SGL    Single Patient Record
LET    Print Individual Patient Letter
LLS    Patient Lists and Letters
VST    View Single Patient State Record

Select Patient Menu Option:
```

Figure 3-1: Patient Menu screen

3.1 Single Patient Record (SGL)

Use the **Single Patient Record** option to view the immunization history of an individual patient and perform the following functions for that patient:

- Add or edit immunizations.
- Add or edit skin tests and results.
- Delete incorrect immunization information.
- Update contraindications., or history of chicken pox.
- Update patient registration information.
- Document consent for participation in the state's Immunization Registry.
- View a health summary (including immunization health summary).
- Print a due letter and official immunization histories.
- View the immunization forecaster for any patient.

3.1.1 Selecting the Single Patient Record Option

To select a single patient record, follow these steps:

1. At the **Select Patient Menu Option** prompt, type **SGL**.
2. At the **Select Patient Name** prompt, type the **patient's name**, **chart number**, or **DOB** to display the **PATIENT VIEW** screen, as shown in Figure 3-2.

```
PATIENT VIEW (IMM v8.5)    May 23, 2022 11:11:32         Page:    1 of    5

 Patient: DEMO,PATIENT BABYBOY       DOB: 02-Feb-2017 (5 yrs)
  Chart#: 896532 at INDIAN HOSPITAL |     Active   Male    M HBsAg: UNK

  #  Immunization History                  |   Immunizations DUE on 05/23/2022
  1  04/25/17  DTaP                   2021 |     DTAP,NOS    due
  2  06/05/17  DTaP                   2021 |     POLIO,NOS   due
  3  07/03/17  DTaP                   2021 |     MMR         due
  4  02/05/18  DTaP                   2021 |     FLU,NOS     due
                                           |
  5  04/25/17  POLIO,NOS              2021 |   Last Letter: None
  6  06/05/17  IPV                    2021 |
  7  09/01/18  POLIO,NOS              2021 |-----------------------------------
                                           |   * CONTRAINDICATIONS/REFUSALS *
  8  03/19/17  HIB,NOS                2021 |
  9  04/16/17  HIB,NOS                2021 |  COV,PfrPed: Anaphylaxis
 10  05/14/17  HIB,NOS                2021 |
+         Scroll down to view more. Type ?? or Q to QUIT.
A  Add Immunization       D  Delete Visit          P  Patient Edit
S  Skin Test Add          R  Report Text           C  Contraindications
E  Edit Visit             H  Health Summary        L  Letter Print
```

Figure 3-2: PATIENT VIEW screen

Important Notes

- All patients displayed using the **Single Patient Record** option are automatically added to the Immunization Registry if they are not already in it. If the user displaying a record has the **BIZ EDIT PATIENTS** key, he or she may be prompted to update the patient's status in the Immunization Registry.
  - If the patient is over 18 years, or if the user does not have the **BIZ EDIT PATIENTS** key, the patient is added with a status of **Inactive** and a reason of **Never Activated**.
  - If the patient is 18 years of age or younger and the user has the **BIZ EDIT PATIENTS** key, the user is prompted to select a status.
  - If the patient is already in the Immunization Registry with a status of **Inactive** but is less than 36 months old, and the user has the **BIZ EDIT PATIENTS** key, the user is prompted to change the patient's status to **Active**.

  - If the patient is deceased, he or she is automatically added with a status of **Inactive** and a reason of **Never Activated**.
- The patient's next appointment is displayed in the **Additional Patient Information** section only if your site is running the **RPMS scheduling** package and the patient has a future appointment.
- Patient age is determined by a count of months or years based on the patient's birth date. For example, a patient is not 3 months old until the same date in the third month, regardless of how many days are in the intervening months.
- If a patient is recorded as deceased in the **Registration Module**, this information is displayed on the **PATIENT VIEW** screen. Letters are not printed for patients who are deceased.
- To view the list of hidden actions on most **ListMan** screens, type **??** at the **Select Action** prompt.

Note: See Section 2.7 for a description of ListMan actions.

3.1.2 Add Immunization (A)

Use the **Add Immunization** option **(A)** on the **PATIENT VIEW** screen to enter a patient's new or historical immunizations into RPMS using the **ADD IMMUNIZATION VISIT** screen, as shown in Figure 3-3. Use this option for patients of any status (e.g., child or adult, Active or Inactive in the Immunization Registry).

```
Imm v8.5            * * *  ADD AN IMMUNIZATION VISIT  * * *

Patient: DEMO,PATIENT BABYBOY            DOB: 02-Feb-2017 (5 yrs)
 Chart#: 896532 at 2021 DEMO HOSPITA          Active     Male

    Visit Date: MAY 23,2022                 Category: Ambulatory
    Admin Date:
 Vaccine: DTAP                                  Lot#:
          (DTaP)

Inj Site: Right Deltoid SQ        Vol: 0.5  ml
Location Type: IHS      Location: 2021 DEMO HOSPITAL (INST)
Provider:                         Ordering Provider:
VIS Date: OCT 15,2021 Presented:
Vac Elig: V04   - Am Indian/AK Native

Exit     Save     Refresh

Enter a command or '^' followed by a caption to jump to a specific field

COMMAND:                                   Press <PF1>H for help
```

Figure 3-3: ADD IMMUNIZATION VISIT screen

The **RPMS Immunization** package is designed to include all the information that must be documented when immunizations are given.

- Each site that chooses to do direct data entry should require that all fields be completed.
- Combination vaccines can be entered by name, such as **Comvax®**, **Pediarix®**, or by **CVX code**. Dose numbers are not recorded. The site, route, and amount can be recorded in RPMS.
- When adding a new immunization visit, you may enter the lot number first, rather than selecting the vaccine first. For some people, this may be more efficient and help avoid errors caused by selecting the wrong vaccine and being unable to find the correct lot number.
- Also note that if you select a vaccine first, your choice of lot numbers is limited to those that apply to that particular vaccine. The same is true when editing an immunization, where the vaccine has already been chosen.
- Each new immunization visit must be assigned a category of **Ambulatory**, **Historical**, or **Inpatient**.
  - **Ambulatory** refers to outpatient or clinic visits (as opposed to inpatient) that occurred at the clinic or hospital where the **Immunization** module software is being used.
  - **Historical** refers to immunizations given at other facilities (not the current facility where the visit is being entered) and to visits that occurred in the past for which details may not be known. This category is available so a patient's immunization history can be as complete as possible, while recognizing that all of the information may not be available.
- If a date other than today is entered, the category automatically defaults to **Historical**. If an ambulatory visit is being entered after the fact, the category can be changed back to **Ambulatory**.

> **Note:** Ordinarily, when entering immunizations with a category of **Ambulatory**, only the currently active vaccines are available for selection (as determined by the manager under the **Vaccine Table Edit** option).

However, when the category is **Historical**, all vaccines, both active and inactive, are available so that a complete history can be entered.

Important: Care should be taken when entering ambulatory immunizations at the current facility a day or more later than the actual visit. If the visit date is other than today's date, the category automatically defaults to **Historical** and many inactive (and inappropriate) vaccines become available for selection. Designating a visit as **Historical** relaxes many safeguards designed to ensure complete and accurate data entry (checks for active vaccines, lot number requirements, duplicate visit checks, etc.)

If the immunization being entered is not truly historical, but merely an ambulatory visit being entered a day or two late, then it is very important to change the category back to **Ambulatory**. This helps to ensure accurate data entry and avoid difficulties and confusion later.

  - Inpatient refers to immunizations given while a patient is admitted to the current hospital/facility where the Immunization Module software is in use.

- Table 3-1 lists the information that should be entered in the **ADD IMMUNIZATION VISIT** screen for each of the three categories.

Table 3-1: Immunization visit data for Ambulatory, Historical, and Inpatient categories

Category	Ambulatory	Historical	Inpatient
Visit Date	Accept the default (today's date)	Type the date of the immunization	Type the admission date
Admin Date	Leave blank	Leave blank	Type the administration date if different from the visit date
Vaccine	Type the vaccine name or combination name (e.g., Comvax® or Pediarix®	Type the vaccine name or combination name (e.g., Comvax® or Pediarix®	Type the vaccine name or combination name (e.g., Comvax® or Pediarix®
Lot #	Type the lot number that appears on the vial.	Leave blank if unknown	Type the lot number that appears on the vial
Injection Site	Type the injection site	Leave blank if unknown	Type the injection site
Volume	Accept the default unless different	Leave blank if unknown	Accept the default unless different

Category	Ambulatory	Historical	Inpatient
Location Type	Accept the default (IHS)	Accept the default (IHS) or change to Other (O) if not an IHS location	Accept the default (IHS)
Location	Accept the default (your facility)	Type the location where the immunization was given	Accept the default (your facility)
Provider	Accept the default, or change if the person entering the data is not the same as the person who gave the immunization	Delete the default by typing the @ sign (Shift + 2)	Accept the default, or change if the person entering the data is not the same as the person who gave the immunization
Ordering Provider	Type the person who ordered the immunization	Leave blank if unknown	Type the person who ordered the immunization
VIS Date	Accept the default, unless blank. Reference CDC website for date	Leave blank if unknown	Accept the default, unless blank. Reference CDC website for date
Presented	Type date when the VIS was presented to patient	Leave blank	Type date when the VIS was presented to patient
VFC Elig	Accept the default or change the value as appropriate	Accept the default or change the value as appropriate	Accept the default or change the value as appropriate
Category	Accept the default (Ambulatory)	Accept the default (Historical)	Change to Inpatient
Reaction	Type **??** to see available options If there was a reaction to a vaccine, enter the appropriate option	Leave blank if the reaction to a historical vaccine is not known Enter the appropriate reaction if known	Type **??** to see available options If there was a reaction to a vaccine, enter the appropriate option
Dose Override	Type **??** to see available options Use only with provider approval	Type **??** to see available options Use only with provider approval	Type **??** to see available options Use only with provider approval

3.1.2.1 Shortcut Keys

- **Exit and Save:** Press **F1** and then **E**.
- **Exit Without Saving:** Press **F1** and then **Q**.
- **Delete a Specific Entry:** Type **@**.
- **Accept Last IHS Location Entered if Different Than Default:** Press the **spacebar** and then the press **Enter**.

3.1.2.2 Admin Date

The **Admin Date** is used when the patient is in the Inpatient setting and the vaccine administration occurs on a different date other than the visit date (admission date). This will help towards forecasting the next dose for those patients.

3.1.2.3 Lot Number

The manager can set a default lot number for each vaccine in the Manager Menu and chooses whether to make the lot number required or optional. See Section 5.0 for more information.

If you select a duplicate lot number, one of the following messages appears depending on whether you hold a **Manager-level** security key:

For Users Who Do Not Hold the BIZ MANAGER Key

You have selected a **Duplicate Lot Number**. This means that the lot number exists at least one other time in the lot number file, and the Immunization Visit you are entering cannot be stored until the duplicate has been resolved.

Only a person with access to the **Manager's menu** can resolve duplicate lot numbers. Since you do not have this access, you should contact your **Immunization Program Manager** or your **Computer Site Manager** for support with this problem. In the meantime, you may finish entering the **Immunization Visit** without a lot number and add the lot number to this visit after the duplicate has been resolved. Or you can quit without adding the visit at this time.

For Users Who Hold the BIZ MANAGER Key

You have selected a **Duplicate Lot Number**. This means that the lot number already exists in the lot number file, and the **Immunization Visit** you are entering cannot be stored until the duplicate has been resolved. Refer to the **Lot Number Add/Edit** option on the **Manager Menu** for resolution of duplicate lot numbers.

3.1.2.4 Volume

The volume field will not accept values greater than 5 milliliters, negative numbers, text or zero. The field must not be blank.

3.1.2.5 Location Type

The **Location Type** field is used to specify whether a location is an **IHS**, **Tribal**, or **Urban Indian** facility (any location that has a recognized **IHS Facility Location Code**), or **OTHER** (unofficial locations, such as private doctors without an **IHS Facility Location Code**). All **OTHER** locations point to one Location Code that is set using the **Edit Site Parameters** option. See Section 5.5 for more information.

3.1.2.6 Location

If the location is an official IHS location, you must enter the name of an IHS facility contained on the official IHS list or the correct code. If you chose **OTHER** for the **Location Type** field, you may use non-official locations (e.g., Dr. Ray Beck).

> **Note:** Immunizations given by staff outside the facility (for example at a home visit or out in the community) should have a Location Type of IHS, and the Location field should contain the name of the IHS facility with which the staff are affiliated.

3.1.2.7 Reaction

The **Reaction** field appears after the immunization is added. The user must type **E** to edit visit, select the **number** associated with date and immunization.

```
Imm v8.5            * * *  EDIT AN IMMUNIZATION VISIT  * * *

Patient: DEMO,PATIENT BABYBOY              DOB: 02-Feb-2017 (5 yrs)
 Chart#: 896532 at 2021 DEMO HOSPITA            Active     Male

    Visit Date: JUN 5,2017                  Category: Historical Event
    Admin Date: JUN 5,2017
 Vaccine: DTAP                                   Lot#:
          (DTaP)

Inj Site: Left Thigh IM            Vol:       ml
Location Type: IHS      Location: 2021 DEMO HOSPITAL (INST)
Provider:                          Ordering Provider:
VIS Date:             Presented: JUN 5,2017  Reaction:
Vac Elig: V04    - Am Indian/AK Native   Dose Override:

If the patient had a reaction to this immunization, select the type of
reaction.
```

Figure 3-4: Reaction and Dose Override Fields

Choose from the following list:

- Anaphylaxis or Collapse (Contraindicates next dose)
- Arthritis or Arthralgias
- Convulsions
- Fever>104
- Lethargy

- Swelling>4cm

3.1.2.8 Dose Override

Use to force a dose to **Valid** (if given a day or so early but won't affect school) or **Invalid** (due to expired vaccine, etc). If you do not want to override this dose, leave it blank or select **0 (zero)**.

Choose from the following list:

- Invalid–Bad Storage
- Invalid–Defective
- Invalid–Expired
- Invalid–Admin Error
- Force Valid

> **Note:** Using dose over-ride affects immunization forecasting; it will ignore invalid doses and will count forced valid doses.

3.1.2.9 Vaccine Information Statement (VIS) Date

Providers are required to give each parent/patient a **VIS** for each vaccine administered and to document the publication date of the VIS as evidence of informed consent. You can set a default **VIS** date using the **Vaccine Table Edit** option. See Section 5.0 for more information.

3.1.2.10 Presented Field

The **Presented** field is required to be filled with a date of when the patient and/or parent/guardian was presented the **Vaccine Information Statement**. This is a requirement with multiple state immunization information systems.

3.1.2.11 Vaccines for Children Eligibility (VFC)

The **VFC Elig** field provides eight options for recording the patient's VFC eligibility for each vaccine:

- Not Eligible (V01)
- Medicaid (V02)
- Uninsured (V03)
- Am Indian/AK Native (V04)
- Underinsured Federally Qualified (V05)
- State-specific Elig (V06)

- Local-specific Elig (V07)

If the patient's **RPMS Registration Beneficiary Type** is **01 (American Indian/Alaska Native)** and the patient is under 19 years of age, **Am Indian/AK Native** appears as the default in the **VFC Elig** field. The **Not Eligible** will appear as the default in the **VFC Elig** field for patients 19 years and older.

3.1.3 Skin Test Add (S)

Use the **Skin Test Add** option **(S)** on the **PATIENT VIEW** screen to enter dates for placement of new or historical skin tests (**PPD**, **Mono-vac**, **Tine**) and the results of the skin tests on the **ADD/EDIT SKIN TEST VISIT** screen, as shown in Figure 3-5.

```
Imm v8.5            * * *  ADD/EDIT SKIN TEST VISIT  * * *

Patient: DEMO,PATIENTE                    DOB: 27-Mar-2001 (21 yrs)
 Chart#: 999102 at 2020 DEMO CLINIC-           Inactive     Female

      Date: DEC 1,2022                        Category: Ambulatory

  Skin Test: CHLAMYDIA      Site: LEFT FOREARM     Volume: .1  ml
                            Lot#:
  Result: NEGATIVE        Reading: 13 mm   Date of Reading:

  Location Type: IHS      Location: 2020 DEMO CLINIC-2 (INST)

  Skin Test Provider:
    Skin Test Reader:

Exit     Save     Refresh

Enter a command or '^' followed by a caption to jump to a specific field

COMMAND:                                        Press <PF1>H for help
```

Figure 3-5: ADD/EDIT SKIN TEST VISIT screen

Use the procedures outlined in this section to add a skin test:

- To display a list of skin tests, type **??** at the **Skin Test** prompt.
- The result of the skin test is either positive, negative, doubtful or no take.
- The reading is the induration in **mm** (e.g., **0**, **02**, or **12mm**).
- Identify the skin test provider and reader.

3.1.4 Edit Visit (E)

Use the **Edit Visit (E)** option on the **Patient View** screen to change vaccine or skin test information in RPMS, including an incorrect date, vaccine, etc. The screens and actions are identical to those described in Section 3.1.2, **Add Immunization (A)**, except there are two additional (Reaction and Dose Override) choices available when editing a vaccine.

3.1.4.1 Shortcut Keys

- **Exit and Save:** Press **F1** and then **E**.
- **Exit Without Saving:** Press **F1** and then **Q**.
- **Delete a Specific Entry:** Type **@**.
- **Accept Last IHS Location Entered if Different Than Default:** Press the **spacebar** and then the press Enter.

3.1.5 Delete Visit (D)

Use the **Delete Visit (D)** option on the **PATIENT VIEW** screen to delete a complete immunization visit or skin test that was erroneously entered (for example, a duplicate immunization record). Figure 3-6 displays an example of the delete confirmation screen that appears when you select a visit to delete.

```
Immunization v8.5          *  DELETE AN IMMUNIZATION VISIT  *

Do you really wish to DELETE this Visit?
   Patient: DOE,DIANA       Chart#: 99977
   26-Mar-1999 @12:00  COCCI   Negative  2 mm    Dr. Black

Enter Yes or No? NO//
Figure 4 5: DELETE AN IMMUNIZATION VISIT screen
```

Figure 3-6: DELETE AN IMMUNIZATION VISIT screen

3.1.6 ICE Forecaster

Use the **Report Text** option on the **PATIENT VIEW** screen (Figure 3-7) to view an in-depth immunization forecast for any patient in the Immunization Registry, including explanations of invalid evaluations in the patient's immunization history.

```
Patient: DEMO,PATIENT BABYBOY    DOB: 02-Feb-2017 (8 yrs)

HLN ICE Forecaster v2.45.2 for: 06/05/2025  (run: 06/05/2025 @ 12:29)

-- IMM HISTORY EVALUATION ---------------------------------------------

  Date       CVX   Vaccine (combo)         Status - Reason
----------  ---  --------------------     ------------------------------
04/25/2017   20  DTaP                     VALID
06/05/2017   20  DTaP                     VALID
07/03/2017   20  DTaP                     VALID
02/05/2018   20  DTaP                     VALID

04/25/2017   89  POLIO,NOS                VALID
06/05/2017   10  IPV                      VALID
09/01/2018   89  POLIO,NOS                VALID

03/19/2017   17  HIB,NOS                  VALID
04/16/2017   17  HIB,NOS                  VALID
05/14/2017   17  HIB,NOS                  VALID
02/05/2018   17  HIB,NOS                  VALID

04/25/2017   45  HEP B,NOS                VALID
05/23/2017   45  HEP B,NOS                VALID
08/15/2017   45  HEP B,NOS                VALID

-- FORECAST -----------------------------------------------------------

DUE:
 | Vaccine       Status          Earliest     Recommended   Overdue
 | -----------   -------         ----------   -----------   ----------
 | Tdap          Due now         02/02/2024   02/02/2024    02/02/2024
 | POLIO,NOS     Due now         02/02/2021   02/02/2021    02/29/2024
 | MMR           Due now         06/22/2018   06/22/2018    06/29/2018
 | FLU,NOS       Due now         07/01/2024   07/01/2024    NO DATE
 | COV,NOS       Due now         08/22/2024   08/22/2024    NO DATE

FUTURE:
 | Vaccine       Status          Earliest     Recommended   Overdue
 | -----------   -------         ----------   -----------   ----------
 | Men4,NOS      Due in future   02/02/2028   02/02/2028    03/01/2030
 | HPV,NOS       Due in future   02/02/2026   02/02/2028    03/01/2030
 | RSV           Due in future   02/02/2092   02/02/2092    NO DATE
 | ZOS-Shgrx     Due in future   02/02/2067   02/02/2067    NO DATE

COMPLETE:
 | Vaccine       Status
 | -----------   -------
 | HIB,NOS       Complete
 | HEP B,NOS     Complete

HIGH RISK:
 | Vaccine       Status
 | -----------   -------
 | None
```

Figure 3-7: Report Text option on PATIENT VIEW screen

3.1.7 Health Summary (H)

Use the **Health Summary (H)** option on the **PATIENT VIEW** screen to view or print a health summary for the patient. You can select from a number of health summaries including:

- Immunization
- Adult Regular
- Dental

- Pediatric
- Problem List

An example of a **Health Summary** screen is shown in Figure 3-8.

```
******** CONFIDENTIAL PATIENT INFORMATION -- 6/23/2023  2:15 PM  [SP] ********
******** DEMO,PATIENT BABYBOY #896532    (IMMUNIZATION SUMMARY)  pg 1 ********

---------------------------- BRIEF DEMOGRAPHICS ----------------------------
DEMO,PATIENT BABYBOY    DOB: FEB 2,2017
2021 DEMO HOSPITAL (INST) HEALTH RECORD NUMBER: 896532
100 MAIN ST,ALBUQUERQUE,NM,55896
Home Phone: None     Work Phone: None
------------------------------- IMMUNIZATIONS -------------------------------
   IMMUNIZATION FORECAST:

     DTAP,NOS           due
     POLIO,NOS          due
     MMR                past due
     FLU,NOS            due
     COV,NOS            due

   IMMUNIZATION HISTORY:

      DTaP                 04/25/17  2 mths  2021 Demo Hospital (
      DTaP                 06/05/17  4 mths  2021 Demo Hospital (
      DTaP                 07/03/17  5 mths  2021 Demo Hospital (
      DTaP                 02/05/18  12 mths 2021 Demo Hospital (

      POLIO,NOS            04/25/17  2 mths  2021 Demo Hospital (
      IPV                  06/05/17  4 mths  2021 Demo Hospital (
      POLIO,NOS            09/01/18  18 mths 2021 Demo Hospital (

      HIB,NOS              03/19/17  1 mth   2021 Demo Hospital (
      HIB,NOS              04/16/17  2 mths  2021 Demo Hospital (
      HIB,NOS              05/14/17  3 mths  2021 Demo Hospital (
      HIB,NOS              02/05/18  12 mths 2021 Demo Hospital (
*** END * CONFIDENTIAL PATIENT INFORMATION -- 6/23/2023  2:15 PM  [SP] ********
```

Figure 3-8: Health Summary screen

3.1.8 Patient Edit (P)

Use the **Patient Edit (P)** option on the **PATIENT VIEW** screen to edit a patient record on the **EDIT PATIENT CASE DATA** screen, as shown in Figure 3-9. The following edits can be made to the patient record (Reminder: Must have the BIZ Manager key to edit this area):

```
                    * * *  EDIT PATIENT CASE DATA  * * *

Patient Name: DEMO,PATIENT BABYBOY (6 yrs)            Chart#: 896532
      Street: 100 MAIN ST                        Patient Phone: Unknown
  Cty/St/Zip: ALBUQUERQUE, NM  55896
------------------------------------------------------------------------
           (The above data may be edited through Patient Registration.)

         Case Manager: ST CYR,DONNA
      Parent/Guardian:
           Other Info:

        Inactive Date:                 Inactive Reason:
 Moved to/Tx Elsewhere:

 Force Pneumo Forecast: Normal
 Mother's HBsAG Status: Unknown                  State Registry Consent:
------------------------------------------------------------------------
Exit     Save     Refresh
```

Figure 3-9: EDIT PATIENT CASE DATA screen

Changing a patient's Active status in the Immunization Registry to Inactive

To inactivate a patient, you must select a date of inactivation and a reason for inactivation from drop-down lists. Reasons include the following:

- Moved elsewhere
- Treatment elsewhere
- Deceased
- Ineligible

Moved to/Tx Elsewhere

Add **text** for the location where the patient moved or the **provider/facility name** where the patient is getting care.

Important Notes

- Entering a date in the Inactive Date field flags the patient as inactive as of that date. Several reports and letters allow the user to specify whether to include inactive patients as well as active patients or to limit results to active patients.

> **Note:** If the patient is inactivated in the **RPMS Patient Registration** package, it is not possible to select and edit the patient in the **Immunization** package (for the given site). This can lead to a problem where a patient counts as delinquent for immunizations but cannot be edited or even inactivated in the **Immunization** package.

  Because of this potential problem, it is important to inactivate the patient in the **Immunization** package first and then inactivate the patient in the **Patient Registration** package.

- If the **Parent/Guardian** field is left blank, the due letters are addressed to **Parent/Guardian of** followed by the patient name.
- Use the Force Pneumo Force field to add the patient to the group that is forecasting for / Pneumococcal vaccine. Select whether **Normal (0)**, or **Pneumococcal (2)**, vaccine should be forecasted for this patient. Leave it blank or enter **Normal** to forecast these vaccines in accordance with the standard forecasting. You may also select **(4) Disregard Risk Factors** to prevent this patient from being forecast for Pneumo due to previous High-Risk diagnoses in their record.
- If you enter **Positive, Negative or Unknown** for **Mother's HBsAg Status**, this status is displayed each time you view the patient's immunization record on the **PATIENT VIEW** screen.
- Document **consent** from the patient to allow their immunization data be sent to the State Immunization Registry. Type **Yes** or **No** at the prompt.
- To update the case manager, type the last name in the field. If the case manager is not listed, refer to the **Manager's Menu–Add/Edit Case Manager (CMG)**.

3.1.9 Contraindications (C)

Use the **Contraindications (C)** option on the **PATIENT VIEW** screen to add, edit or delete contraindications for specific vaccines on the **CONTRAIND** screen, as shown in Figure 3-10.

```
CONTRAIND                    Jun 26, 2023 10:04:08          Page:    1 of    1

 Patient: DEMO,PATIENT BABYBOY        DOB: 02-Feb-2017 (6 yrs)
  Chart#: 896532 at 2021 DEMO HOSPITA   Active     Male

    #  Vaccine     Reason                        Date Noted

    1  VARICELLA:  Hx of Chicken Pox             02-Feb-2018



          Enter ?? for more actions.
A  Add Contraindication                D  Delete Contraindication
E  Edit Contraindication               H  Help
Select Action: Quit//
```

Figure 3-10: CONTRAIND screen

Table 3-2 shows the reasons for contraindication.

Table 3-2: Reasons for Contraindication

Reason	Reason
Convulsion	Neomycin allergy
Carrier (e.g. HBsAg Carrier)	Lethargy/Hypotonic Episode

Reason	Reason
Anaphylactic Egg Allergy	Fever > 104
Hx of Chicken Pox	Anaphylaxis
Allergy to Thimerosal	Allergy to Baker's Yeast
Allergy to 2-Phenoxyethanol	Allergy to Aluminum
Allergy to Proteins of Rodent or Neural Origin	Immune
Patient Currently Pregnant	Previous HX of Intussusception
Gelatin Allergy	Streptomycin Allergy
Latex Allergy	Polymyxin B Allergy
Encephalopathy within 7 days	GBS
Immune deficiency	N/A

- The top of the **CONTRAIND** screen displays the patient's demographic information, most of which is edited through the RPMS Patient Registration module.
- The middle of the screen lists any contraindications to vaccines that the patient is known to have, along with the reason for the contraindication and the date it was noted.
- The bottom of the screen provides the actions available to add, edit, or delete contraindications.

Contraindications added for a patient on the **CONTRAIND** screen cause the contraindicated vaccine to be eliminated from the forecast (in the right column of the main **PATIENT VIEW** screen). You can edit the contraindication date noted if a change is necessary. If you choose **Immune Deficiency**, then **MMR**, **Varicella**, **OPV**, **Rotavirus**, and **Flu-Nasal** (all live vaccines) are automatically contraindicated.

> **Note:** You may select **TST-PPD INTRADERMAL (PPD)** as the vaccine. In this case, the only reason selectable is **Positive TB Skin Test**. This allows the system to display a contraindication to future PPD tests.

3.1.10 Letter Print (L)

Use the **Letter Print (L)** option on the **PATIENT VIEW** screen to print one of the available form letters (**Due Letter**, **Official Immunization Record**, etc.) for the selected patient, as shown in Figure 3-11.

```
                          Jimmy's Immies Clinic
                             7 Your Street
                          Your City, ST  77777


     05-Jun-2025

                                 Date of Birth: 15-Apr-2025 (1 mths)
                                        Chart#: 400

     Parent/Guardian of
     DEMO PATIENT
     4 CREEK DRIVE
     BILLINGS, MT  59101

- -                                                                  - -

     Dear Parent or Guardian:

     Your child, DEMO, is due for immunizations.

     DEMO will be due for the immunizations listed below:

        DTAP
        POLIO
        HIB

     If you feel our records are not correct, please notify us so that
     we may make the corrections to update our records.  Otherwise, please
     bring the your child to the clinic at the date and location given
     below:

     Current Next Appt: 15-June-2025 at UNSPECIFIED MEDICAL CENTER


     Sincerely,



     Dr. Adam Adam

     Printed: 05-Jun-2025 @13:07        Case Manager: DEMO USER
```

Figure 3-11: Letter Print screen

Available form letters are set up by the site manager. There should be at least one **Standard Due Letter** and one **Official Immunization Record**. At the prompt, type the **name** of the letter, or type **??** to select from a list of form letters.

3.2 Print Individual Patient Letter (LET)

Use the **Print Individual Patient Letter (LET)** option on the Patient Menu, as shown in Figure 3-12, to display or print any of the available form letters for a patient.

This option is identical to the **Letter Print (L)** option described in Section 3.1.10. However, no individual patient data is available from the Patient Menu, so clerical staff can send letters to patients without having access to edit patient data.

```
   IMMUNIZATION v8.5          *  PATIENT MENU  *     Site:
                              ==================     User:


   SGL    Single Patient Record
   LET    Print Individual Patient Letter
   LLS    Patient Lists and Letters
   VST    View Single Patient State Record

Select Patient Menu <TEST ACCOUNT> Option: LET
```

Figure 3-12: Patient Menu screen

A list or group of letters can be printed for a given forecast date, an age range, a patient group, a community or group of communities, or one or more case managers. This option gives you the ability to search for and print lists for one or more specific lot number(s) or a specific vaccine type.

> **Note:** You can accept all default settings or change specific settings as necessary.

3.2.1 Immunization List and Letters (LLS)

At the **Select Patient Menu Option** prompt on the **PATIENT MENU** screen, type **LLS** to display the **IMMUNIZATION LISTS & LETTERS** screen as shown in Figure 3-13.

The **IMMUNIZATION LISTS & LETTERS** screen contains a header at the top of the screen, a numbered list of parameters in the center, and available actions and a **Select Action** prompt at the bottom of the screen.

```
                          IMMUNIZATION LISTS & LETTERS

   1 - Date of Forecast/Clinic..: 21-Dec-2022
   2 - Age Range................: 1-72 Months
   3 - Patient Group (01).......: Active

   4 - Community................: ALL
   5 - Case Manager.............: ALL
   6 - Designated Provider......: ALL
   7 - Immunizations Received...: ALL
   8 - Immunizations Due........: ALL
   9 - Health Care Facility.....: 2021 DEMO HOSPITAL (INST)
  10 - Lot Number...............: ALL

  11 - Additional Information...: Forecast
  12 - Order of Listing.........: by Patient Age
  13 - Include Deceased.........: No
          Select a left column number to change an item.
   List of Patients          Print Due Letters          Help
Select Action: Quit//
```

Figure 3-13: IMMUNIZATION LISTS & LETTERS screen

Use the **IMMUNIZATION LISTS & LETTERS** screen to view **Due List** and **Master List** reports and to print **Due Letter** form letters.

As shown in Figure 3-13, this screen includes a list of parameters that can be changed to select a specific group of patients. To change a parameter, type the number from the left column at the **Select Action** prompt. For help or more information about the parameter being changed, type **?** at any prompt.

After you have set the parameters to retrieve the correct group of patients, type **L** at the **Select Action** prompt to print or view a list of the selected patients, or type **P** to print due letters for the selected patients.

Because the system must review every patient in the Immunization Registry to build a list to view or print, some computer systems may take a long time to display the list.

3.2.2 Specifying Parameters for a List or Letter

This section describes how to change the information to be included in a selected list or letter.

3.2.2.1 Date of Forecast/Clinic

The forecast date or clinic date is the date used to calculate which immunizations are due for patients. For example, if you choose today, the letter or report lists the immunizations and patients due today. If you choose a future date (the date of a clinic), the letter or report lists immunizations due on that date. A date in the past cannot be selected.

> **Note:** If a forecast date in the future is selected, some patients may appear as past due for that future date, even though they are not past due today.

3.2.2.2 Age Range

- To select patients in specific age range (in months), type the beginning age and the ending age of the range, separated by a dash (e.g., **6-23**).
- Because the list will include patients from the minimum age in the range to those who are one day less than a month older than the maximum age, the age range **6-23** includes patients who are 6 months old up to, but not including, those who are 24 months old.
- To select only patients of a single age, type the age in months. For example, to select only 12-month-old patients, type **12**.
- To include all patients regardless of age, type **ALL**.
- To specify a range in years rather than months, type **Y** to change from months to years.

3.2.2.3 Patient Group

Use the **Patient Group** parameter to select the group(s) of patients to include in the list. Any combination of the groups listed on the **PATIENT GROUP** screen can be included as shown in Figure 3-14, by typing the numbers separated by commas (for example: 1, 3, 4) at the **Select Patient Group** prompt.

- The **Due** or **Past Due** groups, if selected alone, include only Active patients.
- The **Due** group automatically includes the **Past Due** group.
- The **Search Template** option cannot be combined with any other group.

```
IMMUNIZATION v8.5          *   PATIENT GROUP   *

Please select the Patient Group for this list:

   1- DUE.......................(Patients Due for Immunizations)
   2- PAST DUE..................(Only Patients who are PAST Due)
   3- ACTIVE....................(List of Active Patients)
   4- INACTIVE..................(Inactive Patients, by date if desired)
   5- AUTOMATICALLY ACTIVATED..(By date if desired)
   6- REFUSALS..................(Patients who have refused an vaccines)
```

```
   7- FEMALES ONLY.............(Only female patients included)
   8- SEARCH TEMPLATE..........(Pre-selected group of Patients)
Enter "?" for further explanation.

Select Patient Group: 1,3//
```

Figure 3-14: PATIENT GROUP screen

- The selected group is further limited by the criteria you select on the main **Immunization Lists and Letters** screen, such as **Age Range**, **Communities**, and **Lot Numbers**.
- The **ACTIVE** and **INACTIVE** options list all patients in the **Immunization Registry**, unless they are combined with the **DUE** or **PAST DUE** options.

  For example, in Figure 3-14 option **3 (ACTIVE)** lists all active patients in the registry, while the combination of options **1 (DUE)**, **3 (ACTIVE)**, and **4 (INACTIVE)** lists all active and inactive patients who are due for immunizations.

- After you choose a **Patient Group**, you will get an additional prompt to choose whether you want to only include American Indian/Alaska Native beneficiaries, or to include all patients.
- To list or send a letter to all patients who have received a particular vaccine or lot number, select groups **3 (ACTIVE)** and **4 (INACTIVE)** on the **PATIENT GROUP** screen, and then specify either the vaccine (using the **Immunizations Received** option) or the lot number (using the **Lot Numbers** option) on the **IMMUNIZATION LISTS & LETTERS** screen.
- A **SEARCH TEMPLATE (option 8)** is a group of individual patients produced and stored by other software, usually **QMAN**, and saved under a template name. If you choose this option, you must select the template you want to use from a list of existing search templates.

For more information about search templates and how to create them, contact your organization's computer support for training.

3.2.2.4 Communities

Use the **Communities** parameter to select and save one or more communities for which you can print a list or letters. The default is **All Communities**. You can also select your **GPRA** communities. If you select specific communities, only patients whose current community is specified in Patient Registration matches one of the selected communities are included in the export (Figure 3-15).

> **Note:** Several parameters involve a list of items, such as **Communities**, **Case Managers**, **Immunizations Received**, **Lot Numbers**.

You can edit these parameters to build a list of one or more of the items pertaining to the parameter. The list you build is saved as your own personal list of this particular item and is presented again whenever you return to make selections from that list.

```
Immunization v8.5
                        *  SELECTION OF COMMUNITIES  *


     You have the opportunity here to use the GPRA set of Communities.

     * Enter "G" to automatically use the GPRA set and proceed.
     * Enter "L" to LOAD the GPRA set and then edit your list before
proceeding.
     * Enter "P" to load the PREVIOUS set of Communities you used.
     Select G, L, or P: Load//
```

Figure 3-15: Select Communities screen

Four actions are available for editing these lists:

- **Add (A):** Adds another item to the list
- **Delete (D):** Removes an item from the list
- **Entire File (E):** Selects all of the specified items
- **Clear All (C):** Removes all of the specified items from the list

Your personal list of communities is saved each time you build it. Whenever you return to this list, type **(P)** to view the previous list of communities you built.

3.2.2.5 Case Managers

Use the **Case Managers** parameter to select and save the names of one or more case managers whose patients you want to print a list or letters for. The default is **All Case Managers**. If you select specific case managers, only patients who have the selected case managers are included. The procedure for selecting case managers is similar as described above for selecting communities. Your personal list of case managers is saved each time you build it.

3.2.2.6 Designated Provider

Use the **Designated Provider** parameter to print a list or letters for patients from the panel of one or more designated primary providers. The default is **All Designated Providers**. If you select specific designated providers, only patients who have the selected designated providers are included. The procedure for selecting designated providers is similar as described above for selecting communities. Your personal list of designated providers is saved each time you build it.

3.2.2.7 Immunizations Received

Use the **Immunizations Received** parameter to select and build a list of vaccines received by patients. The default is **All Vaccines**. If you select specific vaccines received, then only patients who have received the selected vaccines are included. The procedure for selecting vaccines received is the same as for selecting communities. Your personal list of vaccines received is saved each time you build it. If you choose a single vaccine or group of vaccines, you will get a prompt that will allow you to choose whether you want to print all vaccines in the patient history, or just the vaccines chosen.

3.2.2.8 Immunizations Due

Use the **Immunizations Due** parameter to select and build a list of vaccines due for your report. The default is **All Vaccines**. If you select specific vaccines due, then only patients who are due for the selected vaccines are included. The procedure for selecting vaccines is the same as described above for selecting communities. Your personal list of vaccines is saved each time you build it.

> **Note:** If you have selected the **Past Due** group for the **Patient Group** parameter (**Parameter 3**), then the **Immunizations Due** parameter becomes **Immunizations Past Due**. This allows searching for patients who are past due for specific vaccines.

3.2.2.9 Lot Number

Use the **Lot Number** parameter to select and build a list of lot numbers for your report. The default is **All Lot Numbers**. If you select specific lot numbers, only patients who have received immunizations with the specified lot numbers are included. The procedure for selecting lot numbers is the same as described above for selecting communities. Your personal list of lot numbers is saved each time you build it.

3.2.2.10 Health Care Facilities

Use the **Health Care Facilities** parameter to select and build a list of facilities for your report. If you select one or more specific facilities, only patients who have a **Health Record Number (HRN)** at one of the selected health care facilities are included.

3.2.2.11 Additional Information

Use the **Additional Information** parameter to select additional patient information, as shown in Figure 3-16, to be included in a list. This parameter does not apply to letters.

```
Immunization v8.5
                    *  Select an Information Item  *



 Choose from:
 Address
 Case Manager
 Contraindications
 Directions to House
 Facility where shot was given
 Forecast
 Immunization History
 Lot Numbers (Immunization Hist
 Next Appointment (RPMS Schedul
 Parent/Guardian
 Phone Number
 Reason Inactivated
 Refusals
 Skin Tests
 VFC (Immunization History)

 Select Information Item:
```

Figure 3-16: ADDITIONAL INFORMATION screen

Any combination of items may be added. The procedure for selecting additional information elements is the same as for selecting communities. Your personal list of additional information is saved each time you build it.

- **Directions to House:** Refers to the physical location of patient's home, as entered on **Page 9** of the **Patient Registration** module.
- **Contraindications:** Is documented in the patient’s single patient record.
- **Parent/Guardian:** Refers to the patient's parent or guardian as listed in **Additional Patient Information** of the **Patient View** in the **Immunization** module.

> **Note:** This is not necessarily the same as the father's name or mother's maiden name, as listed in the **Patient Registration** module.

- **Next Appointment:** Refers to the patient's next appointment if the **RPMS Scheduling** package is in use on this system and if the patient has a future appointment scheduled.

- **Current Community:** Refers to **Page 1**, **Field #8** of the **Patient Registration** module. The patient's current community automatically appears in the right-most column of the **Due List**.
- **Refusals:** The documentation is completed in the **EHR Immunization Component Not Done** dialog template. There is no easy way to document refusals in the RPMS.

3.2.2.12 Order of Listing

The **SELECT ORDER** screen, shown in Figure 3-17, allows you to select the order in which patients are sorted.

```
IMMUNIZATION v8.5          *   SELECT ORDER   *

Select the Order by which patients should be sorted.

     1     Patient Age
     2     Patient Name (alphabetically)
     3     Patient Chart#
     4     Case Manager
     5     Case Manager, then Community
     6     Community, then Case Manager
     7     Community, then Patient Age
     8     Community, then Patient Name
     9     Community, then Patient Chart#
    10     Zipcode, then Patient Name

Select Order: Patient Age//
```

Figure 3-17: Select Order of Listing screen

- **Patient Age:** Lists patients in order of increasing age.
- **Patient Name:** Lists patients by last name, first name alphabetically.
- **Patient Chart#:** Lists patients by increasing chart number (HRN).
- **Case Manager:** Lists patients grouped by case manager and then sorted alphabetically by patient name under each case manager.
- **Case Manager, then Community:** Lists patients grouped first by case manager and then by community.
- **Community, then Case Manager:** Lists patients grouped first by community and then by case manager.
- **Community, then Patient Age:** Lists patients grouped first by community and then by patient age.
- **Community, then Patient Name:** Lists patients grouped first by community and then by patient name.
- **Community, then Patient Chart#:** Lists patients grouped first by community and then by patient chart#.

- **Zip Code, then Patient Name:** Lists patients grouped first by zip codes, with lowest zip codes first, and then by patient name (useful for bulk mailing discounts).

3.2.2.13 Include Deceased

Use the Include Deceased parameter to include deceased patients in the list or report. In general, deceased patients are left off of lists and reports unless you need this information for such purposes tracking recipients of a particular vaccine or reconciling various reports.

3.2.3 Printing a List

Use the **List of Patients** option to display the list of selected patients on your screen, as shown in Figure 3-18, or to send the list directly to the printer queue. You can also print the list after displaying it on your screen.

```
IMMUNIZATION v8.5

WARNING: Confidential Patient Information, Privacy Act applies.

                        UNSPECIFIED MEDICAL CENTER
                       ----------------------------

Report Date: 31-Mar-2008        Total Patients: 6 (1-72 Months)
Clinic Date: 31-Mar-2008         Patient Group: Active

Name                     HRCN#     DOB                Age
Parent/Guardian
==========================================================================
PATIENT,DEMO             12345     01-Jan-1999  (2 months)
     Needs: HIB
            POLIO
--------------------------------------------------------------------------
DEMO,JOANNE              67890     01-Jan-1999 (2 months)
   Needs: HEPB
          HIB
          POLIO
--------------------------------------------------------------------------
```

Figure 3-18: List of Selected Patients screen

- **Print:** If it usually takes a long time for your computer to produce a list of patients, it may be more efficient to queue it to a printer, allowing you to do other work while the report is printing.
- **View:** If you choose to view the list of patients on your screen, you must wait while the computer retrieves the information. You can browse the list on screen by scrolling up and down using the **Arrow** keys. You can also print the list after it appears on the screen, but it takes longer than using the **Print** option.

3.2.4 Print a Due Letter

Use the **Print Due Letters** option to send a selected due letter to your printer or display it on your screen. As with the **List of Patients** option, you can also print the letter after displaying it on screen.

If you send a letter to your printer for a patient or group of patients, the **Patient Immunization** (**Patient View** screen) shows the date on which it was printed.

Use the **Manager Menu** to modify the **Standard Form Letter**. Figure 3-19 shows an example of a **Print a Due Letter** screen.

```
IMMUNIZATION v8.5
                        *   DATE/LOCATION LINE   *

   The Letter you have selected prints a Date/Location line between
   The Bottom Section and the Closing Section of the letter.
   An example would be:

      5-May-1998 at the Children's Clinic, UNPECIFIED Medical Center

   This line may be up to 70 characters long.
   Please enter/edit the Date/Location line now.

   Line
      10/9/1998 at the Children's Clinic, UNPECIFIED Medical Center
```

Figure 3-19: Print a Due Letter screen

> **Note:** If you have a **Date/Location** in your form letter and you are asked to choose a **DATE/LOCATION of CLINIC**, you may enter a specific clinic appointment date, or you may change this line to request it.

4.0 Reports Menu

Figure 4-1 shows the Reports Menu, which is a submenu of the Main Menu (Figure 2-1). Use the Reports Menu to generate and print or display standard reports of immunization coverage in the following formats:

- Adolescent Report
- Adult Immunization Report
- COVID Report
- Influenza Report
- 3-27 month Report
- Two-Year-Old Rates Report
- The patients in these reports can be grouped and displayed in the following ways:
  - Not Current (Not Age Appropriate)

  Or
  - Current

  Or
  - Both Groups

The Reports Menu also offers a doses administered report called the Vaccine Accountability Report, H1N1 Accountability Report, PCV report and an Eligibility Report.

- When you select **View the Report**, a prompt appears at the bottom of the screen that allows you to display and edit the patients included in the report.

Note:	This feature is only available if the report is viewed rather than printed.

- To display the Reports Menu, type **REP** at the **Select New Immunization Menu Option** prompt.
- The Reports Menu displays the options shown in Figure 4-1. Sections 4.1 through 4.7 explain how to use the options on the Reports Menu.

```
IMMUNIZATION v8.5          *  REPORTS MENU  *     Site:
                           ==================     User:


ADO    Adolescent Report
ADL    Adult Report
COV    COVID Report
ELI    Eligibility Report
FLU    Influenza Report
H1     H1N1 Accountability Report
PCV    PCV Report
QTR    3-27 Month Report
TWO    Two-Yr-Old Rates Report
VAC    Vaccine Accountability Report
```

Figure 4-1: Reports Menu screen

4.1 Adolescent Report (ADO)

The **Adolescent Immunization** report provides statistics on Adolescent Immunizations. The population of patients reviewed includes those patients from **11 years 0 months** through **17 years 11 months**. Sites have the option to select from the following patients groups:

- Active in Immunization Package
- Active Clinical User (2 visits/3 years)
- User Population (1 visit/3 year)
- All Registered (all patients registered in the RPMS system)

The **Adolescent** report follows the logic of the **National Immunization Survey (NIS)** to provide immunization coverage rates for single vaccines and groups of vaccines in children **11 to 12 years**, **13 years**, and **13 to 17 years** of age by certain key ages (i.e., **3 HepB** and **2 MMR** and **1-Td/Tdap**, **3-HepB**, **2-MMR**, **1-Var**) by the date of the report. The key ages by which vaccines were received are listed across the top of the report. Total patients who received each dose of the vaccines for each age-group are listed in rows beside each dose (e.g., the total number (%) of 11- to 12-year-old patients receiving 3-HepB by the Report Date). The date header on far-left header signifies doses received by the report date and includes all doses a child received up to the **Quarter Ending Date** chosen. All percentages represent a fraction of the total patients as noted at the top and bottom of the report.

4.1.1 Criteria

- **Single Antigens:**
  - HepB doses 1-3
  - MMR dose 1-2
  - Varicella doses 1-2 and Hx of Chickenpox

  - Tdap or Td/Tdap 1 dose
  - HepA doses 1-2
  - Meningococcal ACWY 1 dose
  - Flu 1 dose in past year

The report also monitors **HPV** vaccine doses 1-3 for both females and males. The HPV vaccine 2-dose schedule has been added to the report. Fully vaccinated 2 doses, fully vaccinated 3 doses and total fully vaccinated (2 or 3 dose) are added to each male and female section. There is also a section added for males and females combined for HPV 1,2, and 3 and fully vaccinated 2 doses, fully vaccinated 3 doses and total fully vaccinated.

- **Combinations:** Five combinations of vaccines are monitored for both genders:
  - 1-Td/Tdap, 3-HepB, 2-MMR, 1-Var
  - 1-Td/Tdap, 3-HepB, 2-MMR, 1-MenACWY, 2-Var
  - 1-Td/Tdap, 1-MenACWY
  - 1-Td/Tdap, 1-MenACWY, HPV-fv
  - 1-Td/Tdap, 3-HepB, 2-MMR, 1-MenACWY, 2-Var, HPV-fv
- **Current/Not Current:** Patients who have received 1 Td/Tdap, 1 MenACWY and 3/2-HPV are considered Current in this report. Patients who have not received these three vaccines are **Not Current**.

4.1.2 Report Parameters

There are five items or parameters shown in Figure 4-2.

```
                    ADOLESCENT IMMUNIZATION RATES REPORT

     1 - Quarter Ending Date........: 04/22/2025
     2 - Community..................: ALL
     3 - Health Care Facility.......: ALL
     4 - Case Manager...............: ALL
     5 - Beneficiary Type...........: INDIAN/ALASKA NATIVE
     6 - Patient Population Group...: Active Users (2+ visits, 3 yrs)

          Enter ?? for more actions
V  View Rates Report      P  Print Rates Report     H  Help
Select Action: Quit//
```

Figure 4-2: Adolescent Immunization Rates Report Screen

- **Quarter Ending Date (1):** The report compiles immunization rates as of the date entered. Typically, this date is the end of a quarter.

- **Community (2):** If you select specific communities, only patients whose current community matches selected communities is included in the report. Current Community refers to **Item 6 on Page 1** of the **RPMS Patient Registration**.
- **Health Care Facility (3):** If you select specific **Health Care Facilities**, only patients who have active chart numbers at one or more of the selected facilities is included in the report.
- **Case Manager (4):** If you select specific **Case Managers**, only patients who have the selected **Case Managers** are included.
- **Beneficiary Types (5):** If you select **Beneficiary Types**, only patients whose beneficiary type is one of those you select is included in the report. Beneficiary Type refers to **Item 3 on page 2** of the **RPMS Patient Registration** package.
- **Patient Population Group (6):** You can select from four different population groups for the Adolescent report (Figure 4-3):
  - Active in the Immunization Registry
  - Registered Patients (All)–This includes all patients registered in RPMS
  - User Population–Patients with 1 visit/3 years
  - Active Clinical (2 visits/last 3 years)

```
                    ADOLESCENT IMMUNIZATION RATES REPORT

     1 - Quarter Ending Date........: 04/22/2025
     2 - Community..................: ALL
     3 - Health Care Facility.......: ALL
     4 - Case Manager...............: ALL
     5 - Beneficiary Type...........: INDIAN/ALASKA NATIVE
     6 - Patient Population Group...: Active Users (2+ visits, 3 yrs)


          Enter ?? for more actions
V  View Rates Report      P  Print Rates Report     H  Help

Select Action: Quit//
```

Figure 4-3: Adolescent Immunization Report screen

```
              *  Adolescent Immunization Report (11-17 yrs)  *
                        Report Date: 08/05/2023
                           End Date: 06/30/2023

Registered Patients (All)                Total Patients: 1549  (F:746  M:803)
-----------------------------------------------------------------------------
Beneficiary Type: INDIAN/ALASKA NATIVE
-----------------------------------------------------------------------------
 Age Group       |      11-12yrs      13yrs       13-17yrs
 Denominators    |        423         194          1126
-----------------------------------------------------------------------------
   1-HEPB        |        353         160          926
                 |         83%        82%          82%
                 |---------------------------------------------------------
   2-HEPB        |        327         156          909
                 |         77%        80%          81%
                 |---------------------------------------------------------
   3-HEPB        |        297         151          890
                 |         70%        78%          79%
-----------------------------------------------------------------------------
   1-MMR         |        228         149          877
                 |         54%        77%          78%
                 |---------------------------------------------------------
   2-MMR         |         40          1           535
                 |          9%         1%          48%
-----------------------------------------------------------------------------
   1-VAR         |        225         147          868
                 |         53%        76%          77%
                 |---------------------------------------------------------
   2-VAR         |         33          1           528
                 |          8%         1%          47%
-----------------------------------------------------------------------------
Hx of Chickenpox|          5          0            5
   (Immune)      |          1%                      0%
-----------------------------------------------------------------------------
   1-Tdap        |         42          2            8
                 |         10%         1%           1%
-----------------------------------------------------------------------------
    1-HEPA       |        212         145          859
                 |         50%        75%          76%
                 |---------------------------------------------------------
    2-HEPA       |         96         126          794
                 |         23%        65%          71%
-----------------------------------------------------------------------------
    1-MENACWY    |          0          0            1
                 |                                  0%
-----------------------------------------------------------------------------
    1-FLU        |         23          0            1
                 |          5%                      0%
-----------------------------------------------------------------------------
 1-Tdap 3-HEPB   |         22          1            3
 2-MMR 1-VAR     |          5%         1%           0%
-----------------------------------------------------------------------------
 1-Tdap 3-HEPB   |          0          0            0
 2-MMR 1-MENACWY |
 2-VAR           |
-----------------------------------------------------------------------------
 1-Tdap 1-MENACWY|          0          0            0
                 |
-----------------------------------------------------------------------------
 1-Tdap 1-MENACWY|          0          0            0
 HPV-fv          |
-----------------------------------------------------------------------------
```

Figure 4-4: Adolescent Immunization Report example

Female Denominators	11-12yrs 197	13yrs 91	13-17yrs 549
1-HPV	0	0	0
2-HPV	0	0	0
3-HPV	0	0	0
Fully Vac'd HPV 2 Doses	0	0	0
Fully Vac'd HPV 3 Doses	0	0	0
Fully Vac'd 2 & 3 combined	0	0	0
1-Tdap 1-MENACWY HPV-fv (females)	0	0	0
1-Tdap 3-HEPB 2-MMR 1-MENACWY 2-VAR HPV-fv (females)	0	0	0

Male Denominators	11-12yrs 226	13yrs 103	13-17yrs 577
1-HPV	0	0	1 0%
2-HPV	0	0	0
3-HPV	0	0	0
Fully Vac'd HPV 2 Doses	0	0	0
Fully Vac'd HPV 3 Doses	0	0	0
Fully Vac'd 2 & 3 combined	0	0	0
1-Tdap 1-MENACWY HPV-fv (males)	0	0	0
1-Tdap 3-HEPB 2-MMR 1-MENACWY 2-VAR HPV-fv (males)	0	0	0

Female + Male Denominators	11-12yrs 423	13yrs 194	13-17yrs 1126
1-HPV	0	0	1 0%
2-HPV	0	0	0
3-HPV	0	0	0
Fully Vac'd HPV 2 Doses	0	0	0
Fully Vac'd HPV 3 Doses	0	0	0
Fully Vac'd 2 & 3 combined	0	0	0

Total Patients reviewed: 1549 Females: 746 Males: 803
Total Patients reviewed who had Refusals on record: 512

*Denominators are all Registered Patients who have an active health record.
*All patients (11-17yrs) with 1-Tdap, 1-MEN, 3/2-HPV are considered "Current"; otherwise they are listed as "Not Current" in order to support patient recall.

Figure 4-5: Sample Adolescent Immunization Report (continued)

4.2 Adult Report (ADL)

The **Adult Immunization** report provides statistics on Adult Immunizations. The population of patients reviewed are those 19 years and older.

4.2.1 Criteria

- **Tetanus:** For all patients–tetanus immunization documented in the past 10 years. This includes any of the following **CVX** codes: **9**, 113, 115, 138, 139 and 196.
- **HPV:** For patients 19-26 years, the report looks for documentation of 1, 2 and 3 doses of HPV. This includes **CVX** codes: **62**, 118,**137 and 165**.
- **Pneumovax:** For patients 19 years and older. This includes any of the following **CVX** codes: **33**, **133, 215 and 216.**

- **Zoster:** 1 dose of Zoster for those 50 years and older. This includes **CVX** code, 187, and 188
- **Hepatitis B:** For patients 19–59 years, the report looks for documentation of 1, 2 and 3 doses of Hep B. This includes CVX codes: 43, 44, 45, 104, 189, 220.
- **Current/Not Current:** The patient must be current for Td/Tdap and Pneumo, as appropriate to be counted as current.

4.2.2 Report Parameters

The **Adult Immunization Report** screen, shown in Figure 4-4, allows you to adjust the report to your needs. There are four parameters on the screen that you may use to select a specific group of patients. To change an item, enter its **left-column number (1-4)** at the prompt on the bottom of the screen. Type **?** at any prompt for more information about the parameter you are changing.

```
Immunization v8.5          Apr 07, 2025 13:48:56          Page:    1 of    1

                         ADULT IMMUNIZATION REPORT

    1 - Quarter Ending Date........: 04/07/2025
    2 - Community..................: ALL
    3 - Health Care Facility.......: ALL
    4 - Beneficiary Type...........: INDIAN/ALASKA NATIVE
    5 - Include CPT Coded Visits...: NO
    6 - Patient Population Group...: Active Users (2+ visits, 3 yrs)

          Select a left column number to change an item.
V  View Adult Report      P  Print Adult Report     H  Help

Select Action: Quit//
```

Figure 4-6: Adult Immunization Report screen

Once you have the parameters set to retrieve the group of patients you want, select **V** to view the **Adult Report** or **P** to print it. Figure 4-5 provides an example of an adult immunization report.

```
                    *  Adult Immunization Report  *
                        Report Date: 04/30/2025

Active Users (2+ visits, 3 yrs)
-------------------------------------------------------------------------------
Beneficiary Type: INDIAN/ALASKA NATIVE
-------------------------------------------------------------------------------
                                                                Number   Percent
-------------------------------------------------------------------------------
 Total Number of Patients 19 years and older...........:     118

   TETANUS: # patients Tdap EVER........................:       1     0.8
   TETANUS: # patients Tdap EVER AND...................
     [Td OR Tdap in past 10 years].....................:       0     0.0

 Total Number of Patients 19-59........................:      81

   HEP B: # patients - Series initiated................:       2     2.5
   HEP B: # patients - Dose 2 initiated................:       1     1.2
   HEP B: # patients - Series completed................:       3     3.7

 Total Number of Patients age 19-26....................:      26    22.0

   HPV: # patients - Series initiated..................:       0     0.0
   HPV: # patients - Dose 2 initiated..................:       1     3.8
   HPV: # patients - Series completed..................:       0     0.0

 Total Number of Patients 50 years and older...........:      55    46.6

   Shingrix: # patients - Series initiated.............:       1     1.8
   Shingrix: # patients - Series completed.............:       6    10.9

 Total Number of Patients age 19-64....................:      89    75.4

   PCV13 and PPSV23: # patients - fully vaccinated.....:       0     0.0
   PCV20: # patients - fully vaccinated................:       1     1.1
   PPSV23 and PCV15: # patients - fully vaccinated.....:       0     0.0

 Total Number of Patients 65 years and older...........:      28    23.7

   Tetanus: # patients w/Td/Tdap in past 10 years......:       5    17.9
   PCV13 and PPSV23: # patients - fully vaccinated.....:       1     3.6
   PCV20: # patients - fully vaccinated................:       3    10.7
   PPSV23 and PCV15: # patients - fully vaccinated.....:       2     7.1

 Total Patients included who had Refusals on record....:      24
```

Figure 4-7: Adult Immunization Report Screen

```
* * * NEW GPRA COMPOSITE MEASURE SECTION * * *

Total Number of Patients ages 19 through 26 years.....:      26

  Received HPV Series complete.........................:       0     0.0

Total Number of Patients ages 19 through 49 years.....:      63

  Received 1 dose of Tdap ever.........................:       1     1.6
  Received 1 dose of Tdap or Td < 10 years.............:       6     9.5
  Received 1 dose of Tdap ever AND Tdap or Td < 10 yrs:       0     0.0
  Received HEP B Series complete.......................:       2     3.2

  Received ALL of the above (appropriately vaccinated):       0     0.0

Total Number of Patients ages 50 through 59 years.....:      18

  Received 1 dose of Tdap ever.........................:       0     0.0
  Received 1 dose of Tdap or Td < 10 years.............:       1     5.6
  Received 1 dose of Tdap ever AND Tdap or Td < 10 yrs:       0     0.0
  Received HEP B Series complete.......................:       1     5.6
  Received Shingrix series complete....................:       1     5.6

  Received ALL of the above (appropriately vaccinated):       0     0.0

Total Number of Patients ages 60 through 65 years.....:       9

  Received 1 dose of Tdap ever.........................:       0     0.0
  Received 1 dose of Tdap or Td < 10 years.............:       1    11.1
  Received 1 dose of Tdap ever AND Tdap or Td < 10 yrs:       0     0.0
  Received Shingrix series complete....................:       1    11.1

  Received ALL of the above (appropriately vaccinated):       0     0.0

Total Number of Patients 66 years and older...........:      28

  Received 1 dose of Tdap ever.........................:       0     0.0
  Received 1 dose of Tdap or Td < 10 years.............:       5    17.9
  Received 1 dose of Tdap ever AND Tdap or Td < 10 yrs:       0     0.0
  Received Shingrix series complete....................:       4    14.3

 Must meet ONE of the following:
  Received 1 dose of PCV13 AND 1 dose PPSV23...........:       1     3.6
  Received 1 dose of PCV20.............................:       3    10.7
  Received 1 dose of PCV15 AND 1 dose of PPSV23........:       2     7.1
  Received 1 of the above - fully vaccinated for Pneum:       6    21.4

 Must meet ONE of the following:
 Received 1 dose of Tdap AND Tdap/Td <10 years AND Shingrix
 series complete and 1 dose PCV13 AND 1 dose PPSV23...:       0     0.0
 Received 1 dose of Tdap AND Tdap/Td <10 years AND Shingrix
 series complete and 1 dose PCV20.....................:       0     0.0
 Received 1 dose of Tdap AND Tdap/Td <10 years AND Shingrix
 series complete and 1 dose PCV15 AND 1 dose PPSV23...:       0     0.0

  Met one of the above (fully vaccinated)..............:       0     0.0


Total Number of Patients 19 years and older...........:     118

 Total Patients 19 years and older appropriately
 vaccinated per age recommendations...................:       0     0.0
```

Figure 4-8: Adult Immunization Report screen (Contunued)

If it customarily takes a long time for your computer to prepare this report, it may be preferable to print and queue the report to a printer, rather than viewing it on screen. (This would avoid tying up your screen while the report is being prepared).

- **Quarter Ending Date (1):** The report compiles immunization rates as of the date entered. Typically, this date would be the end of a quarter. The system interprets most forms in which you type the date. If you type in only a month and a year, the system assigns the last day of the month for the report. The patient ages (65 years, etc.) are calculated as of the date you enter here:
- **Community (2):** If you select communities, only patients whose current community matches one of the communities selected is included in the report. Current community refers to **Item 6 on page 1** of the **RPMS Patient Registration** package.
- **Health Care Facility (3):** If you select Health Care Facilities, only patients who have active chart numbers at a selected facility are included in the report.
- **Beneficiary Types (4):** If you select **Beneficiary Types**, only patients whose beneficiary type is one of those you select to include in the report. Beneficiary Type refers to **Item 3 on page 2** of the **RPMS Patient Registration** package.
- **CPT Coded Visits (5):** If you type **YES** in this field, the report searches for and includes any immunizations that were only entered as **CPT Codes**.

4.3 COVID Report (COV)

The COVID report is a patient-based report which provides statistics on COVID immunizations. An Immunocompromised Section is included in the report to denote statistics on Immunocompromised patients. **Site Parameter 18**, **High-Risk Factor Check #4 COVID Immunocompromised** must be enabled to display data in this section. The population of patients reviewed is less than 2 years to 65 years and older.

- **Report Columns**–The Age in Years is calculated on the selected Ending Date. The columns represent the patient age in years.
- **Report Rows**–The Denominator row of the report is the number of patients within that age group who are included in the report.

Note:	Any patient who was Inactivated prior to the Ending Date selected will not be included in the report.

4.3.1 Criteria

COVID-19 vaccine: For all patients, report looks for documentation of 1 and 2 doses in a 2-dose series and 1 dose in a 1-dose series. It also looks for a 3rd dose for immunocompromised patients and non-immunocompromised patients. For immunocompromised patients, the data is pulled from the following taxonomies: BQI Cancer Dxs, BQI Transplant Dxs, BQI Immune Deficiency Dxs, ATX Immunosuppress RxNorm and ATX Immunosuppress Drugs. This includes any of the following CVX codes: 207, 208, 210, 211, 212, 213, 217,218, 219, 221, 227, 228, 229, 230, 300, 301, 302, 308, 309, 310, 311, 312, 313, 500.

The **Total Fully Vaccinated** row (Figure 4-9) of the report includes patients who have received 2 doses from a 2-dose series and 1 dose from a 1-dose series of a COVID-19 vaccine.

```
 Active Users (2+ visits, 3 yrs)
-------------------------------------------------------------------------------
 Beneficiary Type: INDIAN/ALASKA NATIVE
-------------------------------------------------------------------------------
              |          Age in years on 04/07/2022                  |
              |-----------------------------------------------------| Totals
              |      Pediatric -  Adolescent  |   Adult Population   |
              |    <2     2-4    5-11   12-17 | 18-49   50-64     65+ |
===============================================================================
 Denominator  |     0       3       6      15      33      17      14 |     88
-------------------------------------------------------------------------------
 Total Fully  |     0       0       1       1       3       2       1 |      8
 Vaccinated   |     0%      0%     17%      7%      9%     12%      7%|      9%
              |-----------------------------------------------------------------
+          To view patient rosters, select a group below:
N  NOT Current            C  Current                B  Both Groups
Select Action:+//
```

Figure 4-9: Total Fully Vaccinated row

There is another row (Figure 4-10) that summarizes the total fully vaccinated in two age groups from 0 to 17 years and from 18 to 75+.

```
 Active Users (2+ visits, 3 yrs)
-------------------------------------------------------------------------------
 Beneficiary Type: INDIAN/ALASKA NATIVE
-------------------------------------------------------------------------------
              |          Age in years on 04/07/2022                  |
              |-----------------------------------------------------| Totals
              |      Pediatric -  Adolescent  |   Adult Population   |
              |    <2     2-4    5-11   12-17 | 18-49   50-64     65+ |
===============================================================================
 Denominator  |     0       3       6      15      33      17      14 |     88
-------------------------------------------------------------------------------
 By Category  |   Ages 0-17 yrs:      2 |   Ages 18-75+ yrs:        6 |
              |                      8%|                           9%|
-------------------------------------------------------------------------------
+         To view patient rosters, select a group below:
N  NOT Current            C  Current                B  Both Groups
Select Action:+//
```

Figure 4-10: Totally Fully Vaccinated for two age groups row

There is an **Unvaccinated** row (Figure 4-11) that includes patients who have not received any doses of a COVID-19 vaccine

```
 Active Users (2+ visits, 3 yrs)
-------------------------------------------------------------------------------
 Beneficiary Type: INDIAN/ALASKA NATIVE
-------------------------------------------------------------------------------
              |          Age in years on 04/07/2022                  |
              |-----------------------------------------------------| Totals
              |      Pediatric -  Adolescent  |   Adult Population   |
              |    <2     2-4    5-11   12-17 | 18-49   50-64     65+ |
===============================================================================
 Denominator  |     0       3       6      15      33      17      14 |     88
-------------------------------------------------------------------------------
 Unvaccinated|     0       2       5      13      29      15      13 |     77
              |     0%     67%     83%     87%     88%     88%     93%|     88%
-------------------------------------------------------------------------------
+         To view patient rosters, select a group below:
N  NOT Current            C  Current                B  Both Groups
Select Action:+//
```

Figure 4-11: Unvaccinated row

The **Boosters Received** row (Figure 4-12) includes patients who have received a 3rd or 4th dose of a COVID-19 vaccine.

```
Active Users (2+ visits, 3 yrs)
-------------------------------------------------------------------------------
Beneficiary Type: INDIAN/ALASKA NATIVE
-------------------------------------------------------------------------------
             |          Age in years on 04/07/2022                  |
             |-----------------------------------------------------| Totals
             |      Pediatric -  Adolescent  |   Adult Population    |
             |    <2     2-4    5-11   12-17 | 18-49   50-64     65+ |
===============================================================================
Denominator  |     0       3       6      15      33      17      14 |     88
-------------------------------------------------------------------------------
Boosters     |     0       0       0       0       1       0       0 |      1
Received     |     0%      0%      0%      0%      3%      0%      0%|      1%
-------------------------------------------------------------------------------
+         To view patient rosters, select a group below:
N  NOT Current            C  Current                B  Both Groups
Select Action:+//
```

Figure 4-12: Booster Received row

The **Contraindications** row (Figure 4-13) includes those patients for which a reason was documented and caused to be eliminated from the forecast to receive a COVID-19 vaccine.

```
Active Users (2+ visits, 3 yrs)
-------------------------------------------------------------------------------
Beneficiary Type: INDIAN/ALASKA NATIVE
-------------------------------------------------------------------------------
             |          Age in years on 04/07/2022                  |
             |-----------------------------------------------------| Totals
             |      Pediatric -  Adolescent  |   Adult Population    |
             |    <2     2-4    5-11   12-17 | 18-49   50-64     65+ |
===============================================================================
Denominator  |     0       3       6      15      33      17      14 |     88
-------------------------------------------------------------------------------
Contra-      |     0       0       0       0       0       1       2 |      3
indications  |     0%      0%      0%      0%      0%      6% |   14%|      3%
-------------------------------------------------------------------------------
+         To view patient rosters, select a group below:
N  NOT Current            C  Current                B  Both Groups
Select Action:+//
```

Figure 4-13: Contraindications row

The **Refusals** row (Figure 4-14) includes those patients for which a reason was documented but allows the COVID-19 vaccine to forecast out for the patient.

```
Active Users (2+ visits, 3 yrs)
-------------------------------------------------------------------------------
Beneficiary Type: INDIAN/ALASKA NATIVE
-------------------------------------------------------------------------------
             |          Age in years on 04/07/2022                  |
             |-----------------------------------------------------| Totals
             |      Pediatric -  Adolescent  |   Adult Population   |
             |    <2     2-4    5-11   12-17 | 18-49   50-64     65+ |
===============================================================================
Denominator  |     0       3       6      15      33      17      14 |     88
-------------------------------------------------------------------------------
Refusals     |     0       0       2       1       6       2       4 |     15
             |     0%      0%     33%      7%     18%     12%     29%|     17%
-------------------------------------------------------------------------------
+          To view patient rosters, select a group below:
N  NOT Current            C  Current                B  Both Groups
Select Action:+//
```

Figure 4-14: Refusal row

There is an **IMMUNOCOMPROMISED Section** (Figure 4-15) included in the report; it looks for documentation of the additional dose after completing the 1-dose series and 2-dose series and the patient is eligible to receive it due to a severely weakened immune system. The unvaccinated row in this section includes immunocompromised patients only who have not received any dose of the COVID-19 vaccine. If a booster dose is warranted, then it will display in this section and the general population but will not be culminative. This means if a patient receives 5 booster doses, they will count as one patient, in their age column, having received one or more boosters.

	* IMMUNOCOMPROMISED Section *					
	Age in years on 04/07/2022					Pregnancy*
	12-17	18-49	50-64	65+	Totals	Any Age
Denominator	6	3	3	1	13	0
1st of a 2-Dose Series	1 17%	1 33%	0 0%	0 0%	2 15%	0 0%
Completed 2-Dose Series	1 17%	1 33%	0 0%	0 0%	2 15%	0 0%
Completed 1-Dose Series	0 0%	1 33%	1 33%	0 0%	2 15%	0 0%
Total Fully Vaccinated	1 17%	2 67%	1 33%	0 0%	4 31%	0 0%
Additional Dose Rcvd	0 0%	1 33%	0 0%	0 0%	1 8%	0 0%
Boosters Received	0 0%	1 33%	0 0%	0 0%	1 8%	0 0%
Unvaccinated	5 100%	1 33%	2 67%	1 100%	9 69%	0 0%

Figure 4-15: Immunocompromised section

The patients in this report can be grouped (Figure 4-16) and is displayed in the following ways:

- **N–Not Current (Not Age Appropriate)**
- **C–Current**
- **B–Both Groups**

Patients who have are fully vaccinated are considered **Current** in this report. Patients who have not received a dose are **Not Current**.

```
                              PARKER HOSP
                    *  Standard COVID Immunization Report  *
                          Report Date: 04/07/2022
                          Ending Date: 04/07/2022

 Active Users (2+ visits, 3 yrs)
-----------------------------------------------------------------------
 Beneficiary Type: INDIAN/ALASKA NATIVE
-----------------------------------------------------------------------
              |          Age in years on 04/07/2022                  |
              |-------------------------------------------------------|
              |      Pediatric -  Adolescent  |   Adult Population    |
              |    <2     2-4     5-11   12-17 | 18-49   50-64     65+ |
 ____________________________________________________________________
 Denominator |     1       3       7      10      43      21      17 |
-----------------------------------------------------------------------
 1st of a 2- |     0       0       1       0       4       0       0 |
 Dose Series |     0%      0%     14%      0%      9%      0%      0%|
 ____________________________________________________________________
+          To view patient rosters, select a group below:
N  NOT Current            C  Current                 B  Both Groups
Select Action:+//
```

Figure 4-16: Displaying group of Not Current, Current, or Both Groups

After making changes to either **Not Current** or **Current**, the user can update the existing report without the need of starting from scratch.

When you select **View COVID Report**, a prompt appears at the bottom of the screen that allows you to display and edit the patient included in the report

4.3.2 Report Parameters

The **COVID Report** screen, allows you to adjust the report to your needs (Figure 4-17). There are four parameters on the screen that you may use to select a specific group of patients. To change an item, enter its left column number (1-5) at the prompt on the bottom of the screen. Type a single question mark (**?**) at any prompt for more information about the parameter you are changing.

Once you have the parameters set to retrieve the group of patients you want, select **V** to view the COVID Report or **P** to print it.

```
                          COVID IMMUNIZATION REPORT

     1 - Ending Date................: 04/07/2022

     2 - Community..................: ALL

     3 - Health Care Facility.......: ALL

     4 - Case Manager...............: ALL

     5 - Beneficiary Type...........: INDIAN/ALASKA NATIVE

     6 - Patient Population Group...: Active Users (2+ visits, 3 yrs)


          Select a left column number to change an item.
V  View COVID Report      P  Print COVID Report     H  Help

Select Action:Quit//
```

Figure 4-17: Example of the COVID report parameters

If it customarily takes a long time for your computer to prepare this report, it may be preferable to print and queue the report to a printer, rather than viewing it on screen. (This would avoid tying up your screen while the report is being prepared).

- **Ending Date (1)**: The report compiles immunization rates as of the date entered. The system interprets most forms in which you type the date. If you type in only a month and a year, the system assigns the last day of the month for the report.
- **Community (2)**: If you select **Communities**, only patients whose current community matches one of the communities selected is included in the report. **Current Community** refers to **Item 6 on page 1** of the **RPMS Patient Registration** package.
- **Health Care Facility (3)**: If you select **Health Care Facilities**, only patients who have active chart numbers at a selected facility are included in the report.
- **Case Manager (4)**: If you select specific Case Managers, only patients who have the selected Case Managers are included.
- **Beneficiary Types (5)**: If you select **Beneficiary Types**, only patients whose beneficiary type is one of those you select to include in the report. **Beneficiary Type** refers to **Item 3 on page 2** of the **RPMS Patient Registration** package.
- **Patient Population Group (6)**: You can select from 4 different population groups for the COVID report: **Active in the Immunization Registry**, **Registered Patients (All)**–this includes all patients registered in RPMS; **User Population**–patients with 1 visit/last 3 years, or Active Clinical (2 visits/last 3 years).

```
                    *  Standard COVID Immunization Report  *
                            Report Date: 04/07/2022
                            Ending Date: 04/07/2022

 Active Users (2+ visits, 3 yrs)
-------------------------------------------------------------------------------
 Beneficiary Type: INDIAN/ALASKA NATIVE
-------------------------------------------------------------------------------
               |          Age in years on 04/07/2022                    |
               |-------------------------------------------------------| Totals
               |      Pediatric -  Adolescent  |   Adult Population     |
               |    <2     2-4    5-11   12-17 | 18-49   50-64     65+ |
===============================================================================
 Denominator   |     0       3       6      15      33      17      14 |     88
-------------------------------------------------------------------------------
 1st of a 2-   |     0       1       1       2       2       0       0 |      6
 Dose Series   |    0%     33%     17%     13%      6%      0%      0%|     7%
-------------------------------------------------------------------------------
 Completed 2-  |     0       0       1       1       1       0       0 |      3
 Dose Series   |    0%      0%     17%      7%      3%      0%      0%|     3%
-------------------------------------------------------------------------------
 Completed 1-  |     0       0       0       0       2       2       1 |      5
 Dose Series   |    0%      0%      0%      0%      6%     12%      7%|     6%
-------------------------------------------------------------------------------
 Total Fully   |     0       0       1       1       3       2       1 |      8
 Vaccinated    |    0%      0%     17%      7%      9%     12%      7%|     9%
               |-------------------------------------------------------
 By Category   |   Ages 0-17 yrs:       2 |   Ages 18-75+ yrs:        6 |
               |                       8%|                           9%|
-------------------------------------------------------------------------------
 Boosters      |     0       0       0       0       1       0       0 |      1
 Received      |    0%      0%      0%      0%      3%      0%      0%|     1%
-------------------------------------------------------------------------------
 Unvaccinated  |     0       2       5      13      29      15      13 |     77
               |    0%     67%     83%     87%     88%     88%     93%|    88%
-------------------------------------------------------------------------------
-------------------------------------------------------------------------------
 Contra-       |     0       0       0       0       0       1       2 |      3
 indications   |    0%      0%      0%      0%      0%      6%     14%|     3%
-------------------------------------------------------------------------------
 Refusals      |     0       0       2       1       6       2       4 |     15
               |    0%      0%     33%      7%     18%     12%     29%|    17%
-------------------------------------------------------------------------------
               |    * IMMUNOCOMPROMISED Section *
-------------------------------------------------------------------------------
               |      Age in years on 04/07/2022                |
               |-------------------------------------------------|    Pregnancy*
               |   12-17   18-49   50-64     65+ |    Totals |    Any Age
-------------------------------------------------------------------------------
 Denominator   |      6       3       3       1 |        13 |          0
-------------------------------------------------------------------------------
 1st of a 2-   |      1       1       0       0 |         2 |          0
 Dose Series   |    17%     33%      0%      0%|       15% |         0%
-------------------------------------------------------------------------------
 Completed 2-  |      1       1       0       0 |         2 |          0
 Dose Series   |    17%     33%      0%      0%|       15% |         0%
-------------------------------------------------------------------------------
 Completed 1-  |      0       1       1       0 |         2 |          0
 Dose Series   |     0%     33%     33%      0%|       15% |         0%
-------------------------------------------------------------------------------
 Total Fully   |      1       2       1       0 |         4 |          0
 Vaccinated    |    17%     67%     33%      0%|       31% |         0%
-------------------------------------------------------------------------------
 Additional    |      0       1       0       0 |         1 |          0
 Dose Rcvd     |     0%     33%      0%      0%|        8% |         0%
-------------------------------------------------------------------------------
 Boosters      |      0       1       0       0 |         1 |          0
 Received      |     0%     33%      0%      0%|        8% |         0%
-------------------------------------------------------------------------------
 Unvaccinated  |      5       1       2       1 |         9 |          0
               |   100%     33%     67%    100%|       69% |         0%
-------------------------------------------------------------------------------
 *NOTE: Patients in the Immunocompromised and Pregnancy sections of the report
        are included in the statistics of the Adult General Population section.
-------------------------------------------------------------------------------
 *NOTE: The Pregnancy section of the report is not yet functional.
-------------------------------------------------------------------------------
```

Figure 4-18: Example of a COVID report

4.4 Influenza Report (FLU)

This **Influenza** report provides influenza vaccine coverage data for all age groups. The report can be set for the **Sep1–Dec 31** or **Sep 1–March 31** period of a flu season.

4.4.1 Report Columns

- Age is calculated on **12/31** of the year selected.
- The first column, **10-23 months**, includes children who were 6-23 months old during the influenza season of the selected year.
- The second column and third column includes children who are 2-4 years and 5-17 years respectively.
- The fourth column, **18-49 years**, includes all patients WITHOUT a high-risk condition.
- The fifth column **18-49 HR***, includes patients **18-49 years** WITH a high-risk condition (as defined in the high-risk flu taxonomy). The taxonomy was later removed and not updated for this report. This column will not provide information anymore.

4.4.2 Report Rows

The **Denominator** row of the report is the total number of patients within that age group who are included in the report.

Note:	Any child who was Inactivated prior to 12/31 of the selected year will not be included in the report.

4.4.3 Criteria

The **1-Influenza Year Season** row of the report includes all patients who received at least one dose during the influenza season of the year selected (Sept–Dec). This includes the following CVX codes: **88**, **144**, **123**, **135**, **111**, **141**, **15**, **140**, and **16**.

The Fully immunized row of the report includes children who are:

- **10-23 Months Old** (one of the following):
  - Received 2 doses during the influenza season of the year selected. (Sept 1–December 31st or March 31st, whichever is selected.)
  - Received 1+ dose before Sept 1 and 1+ dose during Sept-December (or March).
- **24-59 Months Old:**
  - Received 2 doses during the influenza season of the year selected. (Sept 1–December 31st or March 31st, whichever is selected)

  Or
  - Received 1+ dose before Sept1 and 1+ dose during Sept-December (or March)
- **5+ years:** Who received 1 dose of influenza vaccine.

The **Influenza Report** screen allows you to adjust the report to your needs.

Once you have the parameters set to retrieve the group of patients you want, select **V** to view the **Adult Report** or **P** to print it. Figure 4-19 provides an example of an **Influenza Immunization Report**. Figure 4-20 provides an example of a **Standard Flu Immunization Report**.

> **Note:** If it customarily takes a long time for your computer to prepare this report, it may be preferable to send the report to a printer, rather than viewing it on screen. (This allows you to do other tasks while the report is being prepared).

- **Quarter Ending Date (1):** The report compiles immunization rates as of the date entered. Typically, this date is the end of a quarter. The system interprets most forms in which you type the date. If you type in only a month and a year, the system assigns the last day of the month for the report. The patient ages (65 years, etc.) are calculated as of the date you enter here:
- **Community (2):** If you select **Communities**, only patients whose current community matches the communities selected is included in the report. **Current Community** refers to **Item 6 on page 1** of the **RPMS Patient Registration** package.
- **Health Care Facility (3):** If you select **Health Care Facilities**, only patients who have active chart numbers at selected facilities are included in the report.
- **Beneficiary Types (4):** If you select **Beneficiary Types**, only patients whose beneficiary type matches those you select are in the report. **Beneficiary Type** refers to **Item 3 on page 2** of the **RPMS Patient Registration** package.

```
Immunization v8.5          Jul 07, 2022 14:56:34         Page:    1 of    1

                        INFLUENZA IMMUNIZATION REPORT


     1 - Report Year (Flu Season)........: 2022/2023  (07/01/22 - 12/31/22)

     2 - Community.......................: ALL

     3 - Health Care Facility............: ALL

     4 - Case Manager....................: ALL

     5 - Beneficiary Type................: ALL

     6 - Patient Population Group........: Active Users (2+ visits, 3 yrs)

     7 - Report Type (Standard or H1N1).: Standard Flu


          Select a left column number to change an item.
V  View Flu Report        P  Print Flu Report        H  Help

Select Action: Quit//
```

Figure 4-19: Flu Report screen

```
                    *  Standard Flu Immunization Report  *
                          Report Date: 04/26/2023
                           Date Range: 07/01/2022 - 12/31/2022

Active Users (2+ visits, 3 yrs)
-------------------------------------------------------------------------------
Beneficiary Type: INDIAN/ALASKA NATIVE
-------------------------------------------------------------------------------
Communities: CACHE; CHATTANOOGA; DEVOL; ELGIN; FAXON; FLETCHER; FT SILL
             GERONIMO; INDIAHOMA; LAWTON; MEDICINE PRK; MEERS; RANDLETT
             STERLING; TEMPLE; WALTERS
-------------------------------------------------------------------------------
Facility: LAWTON INDIAN HOSPITAL
-------------------------------------------------------------------------------
            |          Age in months/years on 12/31/2024            |
   Dose#    |-------------------------------------------------------| Totals
            | 10-23m    2-4y   5-17y  18-49y *18-49hr 50-64y  65+yrs|

-------------------------------------------------------------------------------
Denominator |    96     332    1502    2082     430    1062     770 |   6274
-------------------------------------------------------------------------------
  1-FLU     |    45      71     325     396     137     434     451 |   1859
2022 Season |    47%     21%     22%     19%     32%     41%     59%|     30%
-------------------------------------------------------------------------------
   Fully    |    31      59     325     396     137     434     451 |   1833
 Immunized  |    32%     18%     22%     19%     32%     41%     59%|     27%
-------------------------------------------------------------------------------
 Total Patients included who had Influenza Refusals on record            11
-------------------------------------------------------------------------------
 *NOTE: The 18-49hr column tallies patients who are High Risk in that
        Age Group.  They are not included in the normal 18-49y column.
-------------------------------------------------------------------------------
```

Figure 4-20: Standard Flu Immunization Report screen

4.5 3-27 Month Report (QTR)

With this **Reports Menu** option you can generate a report of the age-appropriate immunization rates for Active children 3 to 27 months of age. The **Immunization Quarterly Report** screen, shown in 0-9, allows you to adjust the report to your needs.

The **IHS**, **Tribal**, and **Urban Indian Health** programs report the current age-appropriate immunization rate of active children 3 to 27 months of age. The criteria listed below are used by IHS to determine the up-to-date status of children in each age group, and the age-specific rates are combined into a total rate. Varicella and Pneumococcal vaccines can be excluded in the report totals by typing **NO** for **option 6**. However, for your report to Headquarters type **YES** to include these in the totals. Age-appropriate immunization rates are given for each age group as well as a total 3 to 27 months age- appropriate rate, using the following criteria in Table 4-1:

Table 4-1: Age-Appropriate Immunization Rates

Age	Vaccine
3-4 months old	1-DTaP 1-IPV 1-Hib 1-HepB 1-PCV
5-6 months old	2-DTaP 2-IPV 2-Hib 2-HepB 2-PCV

7-15 months old	3-DTaP 2-IPV 2-Hib 2-HepB 3-PCV
16-18 months old	3-DTaP 2-IPV 3-Hib 2-HepB 3-PCV 1-MMR 1-Var
19-23 months old	4-DTaP 3-IPV 3 -Hib 3-HepB 4-PCV 1- MMR 1-Var
24-27 months old	4-DTaP 3-IPV 3 -Hib 3-HepB 4-PCV 1- MMR 1-Var

In addition, the **3-27 Month Report** (Table 4-2, Figure 4-21, and Figure 4-22) counts children current for Hib and Pneumo if they started late but are considered up-to-date per the catch-up schedule. Hib vaccine logic includes manufacturer-specific dose numbers. Rotavirus data are included, but rotavirus vaccine is not required for current status.

Table 4-2: 3-27 Month Report Forecasting Logic for Hib, PCV, Rotavirus

Vaccine	3-4mo	5-6mo	7-15mo	16-18mo	19-23mo	24-27mo
PedvaxHib	1	2	2	3 or 2 > 12 mo. 1 > 15 mo.	3 or 2 > 12 mo. 1 > 15 mo.	3 or 2 > 12 mo. 1 > 15 mo.
ActHIB	1	2	3 or 2 > 7 mo.	4 or 3 > 7 mo. 2 > 12 mo. 1 > 15 mo.	4 or 3 > 7 mo. 2 > 12 mo. 1 > 15 mo.	4 or 3 > 7 mo. 2 > 12 mo. 1 > 15 mo.
PCV	1	2	3 or 2 > 7 mo.	4 or 3 > 7 mo. 2 > 12 mo. 1 > 24 mo.	4 or 3 > 7 mo. 2 > 12 mo. 1 > 24 mo.	4 or 3 > 7 mo. 2 > 12 mo. 1 > 24 mo.
Rotavirus	N/A	N/A	N/A	N/A	N/A	N/A
RotaTeq (Rota-5)	1	2	3	3	3	3
Rotarix (Rota-1)	1	2	2	2	2	2

- **Quarter Ending Date (1):** The report compiles immunization rates as of the date entered. Typically, this date is the end of a quarter. The system interprets most forms in which you type the date. If you type in only a month and a year, the system assigns the last day of the month for the report. The patient ages (3 months, 5 months, etc.) will be calculated as of the date you enter here.
- **Community (2):** If your selection is for specific communities, only patients whose current community (under **Patient Registration**) matches one of the communities selected is included in the report. **Current Community** refers to **Item 6 on Page 1** of the **RPMS Patient Registration** package.

- **Health Care Facility (3):** If you select **Health Care Facilities**, only patients who have active chart numbers at one or more of the selected facilities are included in the report. (The default facility is the one under which you have logged in).
- **Case Manager (4):** If you select **Case Managers**, only patients who have the selected **Case Managers** are included in the report.
- **Beneficiary Types (5):** If you select **Beneficiary Types**, only patients whose **Beneficiary Type** is one you selected are included in the report. **Beneficiary Type** refers to **Item 3 on page 2** of the **RPMS Patient Registration** package.
- **Patient Population Group (6):** You can select from four different population groups for the **Adolescent** report:
  - **Active in the Immunization Registry**
  - **Registered Patients (All)**–This includes all patients registered in RPMS
  - **User Population**–Patients with 1 visit/3 years
  - **Active Clinical (2 visits/last 3 years)**
- **Include Varicella and Pneumo (7):** Answer **YES** if you want Pneumo and Varicella rates included in the **Appropriate for Age** statistics at the top of the report. If you answer **NO**, Varicella and Pneumo will NOT appear in the **Minimum Needs** header row at the top of the report. In both cases, the statistics for Varicella and Pneumo will be displayed individually in additional rows at the bottom of the report.

```
Immunization v8.5                                          Page:    1 of    1

                        3-27 MONTH IMMUNIZATION REPORT

    1 - Quarter Ending Date........: 05/16/2025

    2 - Community..................: ALL

    3 - Health Care Facility.......: ALL

    4 - Case Manager...............: ALL

    5 - Beneficiary Type...........: INDIAN/ALASKA NATIVE

    6 - Patient Population Group...: Immunization Register Patients (Active)

    7 - Include Varicella & Pneumo.: YES

          Select a left column number to change an item.
V  View Qtr Report        P  Print Qtr Report       H  Help

Select Action: Quit//
```

Figure 4-21: 3-27 Month Report screen

```
                        UNSPECIFIED INDIAN HOSPITAL
                    *  3-27 Month Immunization Report  *
                          Report Date: 04/26/2023
                             End Date: 03/31/2023

Immunization Register Patients (Active)
-------------------------------------------------------------------------------
Communities:
-------------------------------------------------------------------------------
Facility: UNSPECIFIED INDIAN HOSPITAL
-------------------------------------------------------------------------------
# in Age |     14        19        85        25        55        41 |    239
-------------------------------------------------------------------------------
Minimum  |    1-DTaP    2-DTaP   3-DTaP   3-DTaP    4-DTaP    4-DTaP|
Needs    |    1-POLIO   2-POLIO  2-POLIO  2-POLIO   3-POLIO   3-POLI|
         |    1-HIB     2-HIB    2-HIB    3-HIB     3-HIB     3-HIB |
         |    1-HEPB    2-HEPB   2-HEPB   2-HEPB    3-HEPB    3-HEPB|
         |    1-PCV     2-PCV    3-PCV    4-PCV     4-PCV     4-PCV |
         |                                1-MMR     1-MMR     1-MMR |
         |                                1-VAR     1-VAR     1-VAR |
-------------------------------------------------------------------------------
Approp.  |      9        11        44        11        19        20 |    114
for Age  |     64%       58%       52%       44%       35%       49%|     48%
-------------------------------------------------------------------------------
 1-DTP   |      9        17        66        18        38        28 |    176
 2-DTP   |      4        11        58        17        34        24 |    148
 3-DTP   |               6        44        15        26        23 |    114
 4-DTP   |                        9         9        19        20 |     57
-------------------------------------------------------------------------------
 1-POLIO |      9        17        65        18        36        27 |    172
 2-POLIO |      4        11        58        17        29        24 |    143
 3-POLIO |               6        43        15        22        22 |    108
-------------------------------------------------------------------------------
 1-MMR   |                        17        14        35        25 |     91
-------------------------------------------------------------------------------
 1-HIB   |      9        16        66        18        38        28 |    175
 2-HIB   |      5        11        58        17        34        25 |    150
 3-HIB   |               1        19        13        24        23 |     80
 4-HIB   |                        1         2         5         3 |     11
-------------------------------------------------------------------------------
 1-HEPB  |     12        17        66        18        39        28 |    180
 2-HEPB  |      8        15        64        18        34        27 |    166
 3-HEPB  |      3         9        54        16        27        23 |    132
-------------------------------------------------------------------------------
 1-VAR   |                        17        14        35        25 |     91
-------------------------------------------------------------------------------
 1-HEPA  |                        18        14        34        25 |     91
 2-HEPA  |                                            12        16 |     28
-------------------------------------------------------------------------------
 1-PCV   |      9        16        66        18        38        28 |    175
 2-PCV   |      5        11        62        17        38        25 |    158
 3-PCV   |               6        54        14        37        25 |    136
 4-PCV   |                        16        10        32        21 |     79
-------------------------------------------------------------------------------
 1-ROTA  |      8        16        62        15        37        25 |    163
 2-ROTA  |      4        11        60        14        36        24 |    149
 3-ROTA  |               1         4         2         7         4 |     18
-------------------------------------------------------------------------------
 Total Patients included who had Refusals on record                        0
-------------------------------------------------------------------------------
```

Figure 4-22: Sample 3-27 Month Report

4.6 Two-Yr-Old Rates Report

The **Two-Yr-Old Immunization** report, shown in Figure 4-23, provides age-specific immunization rates for individual vaccines (e.g. **DTaP**) as well as groups of vaccines (e.g. **DTaP 4**, **polio 3**, **MMR 1**) in active children currently 19 to 35 months of age.

```
Immunization v8.5            Aug 18, 2011 11:39:43          Page: 1 of   1

                       TWO-YR-OLD IMMUNIZATION RATES REPORT


     1 - Quarter Ending Date........: 08/18/2011

     2 - Age Range..................: 19-35 months

     3 - Community..................: ALL

     4 - Health Care Facility.......: ALL

     5 - Case Manager...............: ALL

     6 - Beneficiary Type...........: INDIAN/ALASKA NATIVE

     7 - Patient Population Group...: Active Users (2+ visits, 3 yrs)

V  View Rates Report      P  Print Rates Report       H  Help

Select Action: Quit//
```

Figure 4-23: Two-Yr-Old Rates Report

The **Two-Yr-Old** report audits immunization data in the same manner as **CDC's CASA (Clinic Assessment Software Application)** software, and the **National Immunization Survey**. Figure 4-25 (below) is provided as an example of this report.

- Single vaccines: **e.g.**
- **% with DT(a)P 1** by age 3 months
- **% with DT(a)P 2** by age 5 months
- **% with DT(a)P 3** by age 7 months
- **% with DT(a)P 4** by age 19 months, by 24 months, by the report date
- Vaccine groups: **e.g.**, **% with DT(a)P 4**, **polio 3**, **Hib 3**, **MMR 1** by age 24 months, by the report date

The **National Reporting** measure is **%** with **4DTaP**, **3polio**, **1MMR**, **3Hib**, **3 HepB**, **1Var**, **4PCV** by the report date.

```
Immunization v8.5
                        Unspecified Medical Center                  page 1
              *  Two-Yr-Old Immunization Report (19-35 mths)  *
                          Report Date: 08/08/2011
                             End Date: 03/31/2009

 Active Users (2+ visits, 3 yrs)                          Total Patients: 52
-------------------------------------------------------------------------------
 Community:
-------------------------------------------------------------------------------
 Beneficiary Type: INDIAN/ALASKA NATIVE
-------------------------------------------------------------------------------
 Received by |    3 mo     5 mo     7 mo    16 mo    19 mo   03/31/09
             |    # %      # %      # %      # %      # %      # %
===============================================================================
    1-DTaP   |     48       48       48       49       49       50
             |     92%      92%      92%      94%      94%      96%
             |-----------------------------------------------------------------
    2-DTaP   |              36       45       48       48       48
             |              69%      87%      92%      92%      92%
             |-----------------------------------------------------------------
    3-DTaP   |                       33       46       46       47
             |                       63%      88%      88%      90%
             |-----------------------------------------------------------------
    4-DTaP   |                                10       23       40
             |                                19%      44%      77%
-------------------------------------------------------------------------------
    1-POLIO  |     48       48       48       48       48       48
             |     92%      92%      92%      92%      92%      92%
             |-----------------------------------------------------------------
    2-POLIO  |              36       45       48       48       48
             |              69%      87%      92%      92%      92%
             |-----------------------------------------------------------------
    3-POLIO  |                       33       46       46       47
             |                       63%      88%      88%      90%
-------------------------------------------------------------------------------
    1-HIB    |     48       48       48       49       49       49
             |     92%      92%      92%      94%      94%      94%
             |-----------------------------------------------------------------
    2-HIB    |              36       45       49       49       49
             |              69%      87%      94%      94%      94%
             |-----------------------------------------------------------------
    3-HIB    |                        2       44       45       46
```

Figure 4-24: Unspecified Medical Center Two Year Old Immunization Report Example

4-HIB				3 6%	3 6%	3 6%
1-HEPB	48 92%	48 92%	48 92%	48 92%	48 92%	48 92%
2-HEPB	42 81%	47 90%	48 92%	48 92%	48 92%	48 92%
3-HEPB		30 58%	43 83%	48 92%	48 92%	48 92%
1-MMR				43 83%	45 87%	46 88%
1-VAR				40 77%	42 81%	45 87%
1-HEPA				12 23%	24 46%	41 79%
2-HEPA						17 33%
1-FLU			17 25%	33 63%	35 67%	36 69%
2-FLU			1 2%	12 23%	18 35%	25 48%
3-FLU				1 2%	6 12%	13 25%
4-FLU						1 2%
1-PCV	48 92%	48 92%	48 92%	48 92%	48 92%	49 94%
2-PCV		36 69%	45 87%	48 92%	48 92%	48 92%
3-PCV			33 63%	46 88%	46 88%	47 90%
4-PCV				39 75%	41 79%	42 81%
1-ROTA	15 29%	15 29%	15 29%	15 29%	15 29%	15 29%
2-ROTA		12 23%	14 27%	14 27%	14 27%	14 27%
3-ROTA			10 19%	10 19%	10 19%	10 19%
1-DTaP 1-POL 1-HIB 1-HEPB	48 92%	48 92%	48 92%	48 92%	48 92%	48 92%
4-DTaP 3-POL 1-MMR				10 19%	22 42%	39 75%
4-DTaP 3-POL 1-MMR 3-HIB				10 19%	22 42%	39 75%
4-DTaP 3-POL 1-MMR 3-HIB 3-HEPB				10 19%	22 42%	39 75%
4-DTaP 3-POL 1-MMR 3-HIB 3-HEPB 1-VAR				10 19%	21 40%	38 73%
4-DTaP 3-POL 1-MMR 3-HIB 3-HEPB 1-VAR 3-PCV				10 19%	21 40%	38 73%
4-DTaP 3-POL 1-MMR 3-HIB 3-HEPB 1-VAR 4-PCV *UTD				10 19%	20 38%	36 69%
4-DTaP 3-POL 1-MMR 3-HIB 3-HEPB 1-VAR 4-PCV 1-HEPA				10 19%	19 37%	36 69%
4-DTaP 3-POL 1-MMR 3-HIB 3-HEPB 1-VAR 4-PCV 2-HEPA 3-ROTA						
4-DTaP 3-POL 1-MMR 3-HIB 3-HEPB 1-VAR 4-PCV 2-HEPA 3-ROTA 2-FLU						

Total Active Patients reviewed 52

Total Patients included who had Refusals on record 2

Figure 4-25: Two-Yr-Old Rates Report example (continued)

In addition, the **Two Yr Old Report** takes into account Hib and Rotavirus vaccine formulation and number of doses needed (**3 vs. 4 Hib; 2 vs. 3 Rota**) in determining up-to-date status.

4.7 PCV Report

The PCV Report (Figure 4-26) provides **doses administered by age** group. This report can be printed for any time period and can be limited to reporting for patients in one or more communities.

Note: Historical immunizations are included in this report.

There are three items or parameters on the screen that you may change in order to select for a specific group of patients. To change an item, enter its left column number (1-3) at the prompt on the bottom of the screen. Use **?** at any prompt where you would like help or more information on the parameter you are changing.

Once you have the parameters set to retrieve the group of patients you want, select **V** to view the PCV report, or **P** to print it.

If it customarily takes a long time for your computer to prepare this report, it may be preferable to Print and Queue the report to a printer, rather than viewing it on the screen (this would avoid tying up your screen while the report is being prepared).

- **Date Range:** Only immunizations given within the Date Range you select will be included in the **Total Doses in Date Range** row at the bottom of the report (All other rows include PCV doses given throughout patients' histories.
- **Patient Population Group:** You may select one of four patients groups to be considered in the report: **Registered Patients (All)**, **Immunization Register Patients (Active)**, **User Population (1+ visits in 3 yrs)**, or **Active Clinical Users (2+ visits in 3 yrs)**. **Active Clinical User** is the default.
- **Communities:** If you select specific **Communities**, only patients whose **Current Community** matches one of the **Communities** selected will be included in the report. **Current Community** refers to **Item 6 on Page 1** of the **RPMS Patient Registration**.

```
Immunization v8.5          Jun 09, 2025 10:43:29          Page:    1 of    1

                              PCV REPORT

     1 - Date Range.................: 06/09/2024 - 06/09/2025

     2 - Patient Population Group...: Active Users (2+ visits, 3 yrs)

     3 - Community..................: ALL

          Enter ?? for more actions
V  View PCV Report        P  Print PCV Report       H  Help
Select Item(s): Quit//
```

Figure 4-26: PCV Report Selection screen

Figure 4-27 displays the **PCV Report** that provides coverage with **PCV13 vaccine** for different age groups.

```
Immunization v8.5
                                PARKER HOSP                          page 1
                              *  PCV Report  *
                          Report Date: 08/08/2011
                           Date Range: 01/01/2011 - 08/08/2011

Active Users (2+ visits, 3 yrs)
-------------------------------------------------------------------------------
# of Children  |     0-59m      2-23m     24-59m      6-11m     12-23m
===============================================================================
 Denominator   |       695        225        470         79        139
-------------------------------------------------------------------------------
1+ doses PCV13 |       474        175        299         46        129
               |        68%        78%        64%        58%        93%
-------------------------------------------------------------------------------
3+ doses PCV13 |       188        140         48         22        118
               |        27%        62%        10%        28%        85%
-------------------------------------------------------------------------------
4+ doses PCV13 |       106         68         38         17         51
               |        15%        30%         8%        22%        37%
-------------------------------------------------------------------------------
Total Doses    |
in Date Range  |       351        261         90         73        188
-------------------------------------------------------------------------------
```

Figure 4-27: PCV Report example

4.8 Vaccine Accountability Report (VAC)

The **Vaccine Accountability** report, shown in Figure 4-28, displays doses administered by vaccine series (e.g., **DTaP**) and by age group. Vaccines can also be listed by lot number. This report can be printed for any time period (typically, these are monthly reports) for a given facility, visit type (e.g. **PHN**, **638**), or for a community or group of communities.

```
Immunization v8.5            Aug 18, 2011 11:45:15          Page: 1 of    1

                         VACCINE ACCOUNTABILITY REPORT


     1 - Date Range..................: 08/18/2010 - 08/18/2011

     2 - Community...................: ALL
     3 - Health Care Facility........: ALL
     4 - Case Manager................: ALL

     5 - Beneficiary Type............: ALL
     6 - Visit Type..................: ALL

     7 - Include Historical..........: YES
     8 - Display by Lot Number.......: NO

Select a left column number to change an item.

 V  View Account Report    P  Print Account Report     H  Help

Select Action: Quit//
```

Figure 4-28: Vaccine Accountability Report Selection screen

The **Vaccine Accountability** report (Figure 4-29) can also be displayed by lot number.

```
Immunization v8.5
                        Alaska Native Medical Center                 page 1
                     *  Vaccine Accountability Report  *
                           Report Date: 08/09/2011
                            Date Range: 01/01/2009 - 03/31/2009

 (Historical Included)
-------------------------------------------------------------------------------------------
 Facilities: ANCH MED CTR; SOUTHCENTRAL FOUNDATION; WASILLA
-------------------------------------------------------------------------------------------
   <1    -1-   -2-   3-5   -6-  7-10 11-12 13-18 19-24 25-44 45-64   65+  TOTAL
  ----- ----- ----- ----- ----- ----- ----- ----- ----- ----- ----- ----- -----
===========================================================================================
                            DTAP,NOS - All Lots
  ----- ----- ----- ----- ----- ----- ----- ----- ----- ----- ----- ----- -----
                                                                        1     1
-------------------------------------------------------------------------------------------
                           DTAP,NOS - No Lot Number
  ----- ----- ----- ----- ----- ----- ----- ----- ----- ----- ----- ----- -----
                                                                        1     1
-------------------------------------------------------------------------------------------
                              DTaP - All Lots
  ----- ----- ----- ----- ----- ----- ----- ----- ----- ----- ----- ----- -----
    20   185    31   146     6                                1           389
-------------------------------------------------------------------------------------------
                             DTaP - AC14B064AA
  ----- ----- ----- ----- ----- ----- ----- ----- ----- ----- ----- ----- -----
     4     6     3     8                                                   21
-------------------------------------------------------------------------------------------
                             DTaP - AC14B065AA
  ----- ----- ----- ----- ----- ----- ----- ----- ----- ----- ----- ----- -----
    16   152    25   113     5                                1           312
```

Figure 4-29: Vaccine Accountability Report example

4.9 Vaccine Eligibility Report

The **Vaccine Eligibility Report** (Figure 4-30) provides a listing of doses administered by date and patient information, along with the patient eligibility recorded for that visit. Lot number is also displayed. This report can be printed for any time period, for a given facility, visit type or community.

```
                    VACCINE ELIGIBILITY REPORT


     1 - Date Range..................: 06/09/2024 - 06/09/2025

     2 - Community...................: ALL
     3 - Health Care Facility........: ALL
     4 - Case Manager................: ALL

     5 - Beneficiary Type............: ALL
     6 - Visit Type..................: ALL

     7 - Include Historical..........: YES
     8 - Include Adults (>19 yrs)....: NO

     9 - Delimiter...................: 2 spaces

          Select a left column number to change an item.
V  View Elig Report       P  Print Elig Report      H  Help

Select Action: Quit//
```

Figure 4-30: Vaccine Eligibility Report

There are nine items or parameters on the screen that you may change in order to select for a specific group of patients. To change an item, enter its left column number (1-8) at the prompt on the bottom of the screen. Use **?** at any prompt where you would like help or more information on the parameter you are changing.

Once you have the parameters set to retrieve the group of patients you want, select **V** to View the Vaccine Elig Report (Figure 4-31) or **P** to print it.

- **DATE RANGE:** Only immunizations given within the Date Range you select will be included in the report.
- **COMMUNITIES:** If you select specific **Communities**, only patients whose **Current Community** matches one of the **Communities** selected will be included in the report. Current Community refers to Item 6 on Page 1 of the RPMS Patient Registration.

- **HEALTH CARE FACILITIES:** If you select for specific **Health Care Facilities**, only immunizations given at the selected Health Care Facilities will be included in the report.
- **CASE MANAGERS:** If you select for specific **Case Managers**, only patients who have the selected **Case Managers** will be included in the report.
- **BENEFICIARY TYPES:** If you select for specific **Beneficiary Types**, only patients whose Beneficiary Type is one of those you select will be included in the report. **Beneficiary Type** refers to **Item 3 on Page 2** of the **RPMS Patient Registration**.
- **VISIT TYPES:** If you select for specific **Visit Types**, only visits that are classified with one of the **Visit Types** you select will included in the report.
- **INCLUDE HISTORICAL:** If this parameter is set to **YES**, then Visits with a Category of Historical will be counted in the Vaccine Eligibility Report. (Category is displayed and edited on the **ADD/EDIT IMMUNIZATION VISIT** Screen.) If set to **NO**, they will not be counted in the report.
- **INCLUDE ADULTS:** If this parameter is set to **YES**, then immunizations given when the patient was 19 years of age or older will be included. Otherwise, only immunizations given when the patient was younger than 19 years of age will be included.
- **DELIMITER:** This parameter allows you to select the character that will separate the six fields in each record displayed by the report. The default delimiter is two spaces. However, when the intention is to print or copy the report to a text file for the purpose of importing it into Excel or some other spreadsheet, use of the caret "^" is preferable and recommended. (Spaces in the data itself might sometimes be confused with spaces in the delimiter and/or spaces used to make the columns line up.)

The **H1N1 Accountability Report** (Figure 4-32) provides doses administered by age group. This report can be printed for any time period, for a given facility, visit type, or community.

```
                              PARKER HOSP
                      *  Vaccine Eligibility Report  *
                          Report Date: 06/09/2025
                           Date Range: 06/09/2024 - 06/09/2025

(Historical Included, Adults Excluded)                Total Immunizations: 76
-----------------------------------------------------------------------------
  Date    Last,First Name   DOB    Eligibility  Vaccine      Lot#
08/22/24  DEMO,CDSCHILD   05/22/15  AmIn/AKNa  COV,1vPfrP  SP2345
08/22/24  TEST,NEWBORN    02/12/20  AmIn/AKNa  COV,1vModP  SUR1144
10/01/24  DEMO,BABY BSTS  09/18/19  AmIn/AKNa  COV,1vPfrP  SP2345
10/01/24  DEMO,BEAUTIFUL  12/02/18  AmIn/AKNa  COV,1vPfrP  SP2345
10/01/24  GARCIACON,DEMO  10/01/17  AmIn/AKNa  COV,1vPfrA  QB1234
10/01/24  DEMO,OLIVIA     12/01/07  AmIn/AKNa  Men-B,Bex   TGC163
10/01/24  SHASTA,STRAWBE  02/03/20  AmIn/AKNa  COV,1vPfrT  XB409
```

Figure 4-31: Vaccine Elig Report

```
                          H1N1 ACCOUNTABILITY REPORT


     1 - Date Range..................: 06/01/2025 - 06/07/2025

     2 - Community...................: ALL

     3 - Health Care Facility.......: ALL

     4 - Case Manager...............: ALL

     5 - Beneficiary Type...........: ALL

     6 - Visit Type.................: ALL

     7 - Include Historical.........: YES

V  View H1N1 Report       P  Print H1N1 Report      H  Help

Select Action: Quit//
```

Figure 4-32: H1N1 Accountability Report

There are 7 items or parameters on the screen that you may change in order to select a specific group of patients.

To change an item, enter its left column number (1-7) at the prompt on the bottom of the screen. Use a question mark (**?**) at any prompt where you would like help or more information on the parameter you are changing.

Once you have the parameters set to retrieve the group of patients you want, select V to View the Vaccine Acct Report or P to print it.

- **DATE RANGE:** Only immunizations given within the **Date Range** you select will be included in the report. The maximum date range that will be examined is 8/1/09 to 8/31/10.
- **COMMUNITIES:** If you select specific **Communities**, only patients whose **Current Community** matches one of the **Communities** selected will be included in the report. Current Community refers to **Item 6 on Page 1** of the **RPMS Patient Registration**.
- **HEALTH CARE FACILITIES:** If you select for specific **Health Care Facilities**, only immunizations given at the selected **Health Care Facilities** will be included in the report.
- **CASE MANAGERS:** If you select specific **Case Managers**, only patients who have the selected **Case Managers** will be included in the report.
- **BENEFICIARY TYPES:** If you select for specific **Beneficiary Types**, only patients whose Beneficiary Type is one of those you select will be included in the report. Beneficiary Type refers to **Item 3 on Page 2** of the **RPMS Patient Registration**.
- **VISIT TYPES:** If you select for specific **Visit Types**, only visits that are classified with one of the **Visit Types** you select will included in the report.
- **INCLUDE HISTORICAL:** If this parameter is set to **YES**, then visits with a Category of Historical will be counted in the **H1N1 Accountability Report** (Figure 4-33). Category is displayed and edited on the **ADD/EDIT IMMUNIZATION VISIT** Screen.) If set to **NO**, they will not be counted in the report.

```
                              PARKER HOSP
                      *  H1N1 Accountability Report  *
                          Report Date: 06/09/2025
                           Date Range: 12/01/2009 - 12/02/2009

(Historical Included)
-------------------------------------------------------------------------------
 Dose  |  6-23m   24-59m    5-18y   19-24y   25-49y   50-64y    65+y  |  TOTAL
-------------------------------------------------------------------------------
DEC 01 |                                                             |
    #1 |      2        2        6        0        1        3        2 |     16
    #2 |      0        1        2        0        0        0        0 |      3
-------------------------------------------------------------------------------
DEC 02 |                                                             |
    #1 |      3        2        5        0        3        1        0 |     14
    #2 |      1        0        0        0        0        0        0 |      1
-------------------------------------------------------------------------------
Total H1N1 First Doses                                               |     30
Total H1N1 Second Doses                                              |      4
-------------------------------------------------------------------------------
Total H1N1 Immunizations                                             |     34
-------------------------------------------------------------------------------
```

Figure 4-33: Example of H1N1 Accountability Report screen

5.0 Manager Menu

Only certain users (e.g., **Case Managers** and **Program Managers**) should have access to the Manager Menu. Figure 5-1 shows the **Main Menu with the Manager** option. From this menu, managers can correct patient errors, add/edit **Case Managers**, edit site parameters for the **Immunization Module**, re-standardize the **Vaccine Table**, and export **Immunization Data** to another software program or to an agency (e.g., State Health Department), and more.

```
                 .. --- ..         *     *         .. --- ..
               *          ~ *.      \   /      .* ~          *
             *                *      \ /      *                *
            (         NEW       *    (|)    *     Version       )
             *    IMMUNIZATION    *  ***  *         8.5        *
               *.                   *   *                   .*
                  *                 *     *                *
                    >               *     *               <
                   *                 *   *                *
                  *                * *     * *               *
                 *     @         *   *     *   *        @     *
                (             *      *   *      *             )
                 *.         *          ***          *         .*
                   / /-- ~             ~             ~ --\ \

                         MAIN MENU at INDIAN HOSPITAL


    PAT  Patient Menu  . . .
    REP  Reports Menu  . . .
    MGR  Manager Menu  . . .

  Select Immunization Menu Option: MGR
```

Figure 5-1: Main Menu–Manager option example

5.1 Selecting the Manager Menu

To select the **Manager Menu**, type **MGR** at the **Select Immunization Menu Option** prompt. The Manager Menu displays the options shown in Figure 5-2.

```
IMMUNIZATION v8.5          *  MANAGER MENU  *        Site:
                              ==================     User:
   ERR    Edit Patient Errors
   CMG    Add/Edit Case Manager
   CMT    Transfer a Case Manager's Patients
   SCN    Scan For Patients
          -----------------------------
   ESP    Site Parameters Edit
   PKG    Package Setup Information
   LET    Form Letters Add/Edit
   LOT    Lot Number Add/Edit
   VAC    Vaccine Table Edit
   ELI    Eligibility Table Edit
   RES    Restandardize Vaccine Table
   EXP    Export Immunizations
```

```
   KEY    Allocate/Deallocate Imm Menu Keys
   NDC    NDC Code Add/Edit
   XVT    Export Vaccine Table to Excel File
   PER    Performance Test Imm Forecaster
   VIM    Remove External Date from V Immunization

Select Manager Menu Option:
```

Figure 5-2: Manager Menu

5.2 Edit Patient Errors (ERR)

This screen, shown in Figure 5-3, displays patient immunization histories that contain errors according to the ICE Forecaster utility and provides you with the ability to correct or delete those errors. The columns, from left to right, list the following:

- **Patient** (patient name)
- **Active/Inactive Status** (**A**=Active, **I**=Inactive, **N**=Not In Register)
- **HRCN#** (Health Record Number or Chart#)
- **Age** (y=years, m=months, d=days)
- **Vaccine Group (V GRP)** in which the error is occurring
- **Error** (an abbreviated statement explaining the error)

The three actions at the bottom of the screen allow you to make corrections to patient errors on the list (**Edit Patient Error**) or to delete them, either individually (**Delete Patient Error**) or all at once (**Clear/Delete All Errors**) from the list.

```
Immunization v8.5                                        Page:    1 of    1

                              PARKER HOSP
                        --------------------------------
                        ACTIVE PATIENT ERRORS (Total: 0)

  #  Patient                Active   HRCN#     Age   V Grp  Error
 ____________________________________________________________________

          Enter ?? for more actions.
E  Edit Patient Error     D  Delete Patient Error   C  Clear/Delete All Errors
Select Action: Quit//
```

Figure 5-3: Edit Patient Errors screen

5.3 Add/Edit Case Manager (CMG)

This option, shown in Figure 5-4, allows the manager to add or edit a Case Manager. When you add new Case Managers, they can be selected when editing a patient's Case Data. The **Date Inactivated** field makes it possible for you to inactivate case managers.

```
Immunization v8.5
                      *  ADD/EDIT CASE MANAGERS  *

Select CASE MANAGER: MANAGER, DEMO        DM            MANAGER
...OK? Yes//   (Yes)
DATE INACTIVATED:
```

Figure 5-4: Add/Edit Case Manager's screen

5.4 Transfer a Case Manager's Patients (CMT)

The manager can use this option to transfer patients to another case manager in events such as a turnover in staff or a re-assignment of cases. Figure 5-5 shows an example of a **Transfer Case Manager's Patients** screen. The person indicated as the new Case Manager must first be added to the file using the **Add/Edit Case Managers** option.

```
Select OLD CASE MANAGER: ??
Choose from:
   DEMO,DEMO
   MANAGER,DEMO
   MANAGER,DEMO
   MANAGER,DEMO2
Select OLD CASE MANAGER: MANAGER,DEMO
Select NEW CASE MANAGER: MANAGER,DEMO2      RM
All patients currently assigned to: MANAGER,DEMO
Will be reassigned to.............: MANAGER,DEMO2
Do you wish to proceed?  Enter Yes or No? Yes
22 patients transferred from MANAGER,DEMO to MANAGER,DEMO2
```

Figure 5-5: Transfer a Case Manager's Patient's screen

5.5 Scan for Patients (SCN)

This program scans the **RPMS Patient Database** for children who are less than 36-months-old. Any child who is not in the Immunization Database and who lives in one of the Communities you select is made **Active** in the **Immunization Register**.

The program allows you to select specific communities from which patients are scanned. (This is the **Current Community** field in **RPMS Patient Registration**.) You then automatically have the opportunity to use the GPRA set of communities by selecting one of the following options:

- **G**–To use the **GPRA** set and proceed automatically.

- **L**–To **LOAD** the **GPRA** set and then edit your list before proceeding.
- **P**–To load the **PREVIOUS** set of Communities you used.

5.6 Site Parameters Edit (ESP)

This option allows the manager to edit parameters that are specific to a site (facility) as shown in Figure 5-6. Refer to the **PKG** option on the **Manager Menu** or to **Site Parameters** for more information relating to the site parameters.

```
Immunization v8.5        May 19, 2025 08:12:34         Page:    1 of 2

    Edit Site Parameters for: PARKER HOSP

  1) Default Case Manager.........: PALANKI,SURYAM RPH
  2) Other Location...............: PARKER HOSP
  3) Standard Imm Due Letter .....: STANDARD DUE LETTER
  4) Official Imm Record Letter...: OFFICIAL IMMUNIZATION RECORD
  5) Facility Report Header.......: PARKER HOSP
  6) Host File Server Path........: G:\PUB\
  7) Minimum Days Last Letter.....: 60 days
  8) Minimum vs Recommended Age...: Recommended Age
  9) 4-Day Grace Period option....: 4-Day Grace Period Used
 10) Lot Number Options...........: NOT Required, Default Low Supply Alert=50
 11) Pneumo routine age to begin..: Begin Pneumo at 65 years
 12) Forecasting (Imms Due).......: Enabled
 13) Chart# with dashes...........: No Dashes (123456)
 14) User as Default Provider.....: Yes
 15) IP Address for ICE Forecaster: 127.0.0.1
 16) GPRA Communities.............: 1 Communities selected for GPRA.
 17) Inpatient Visit Check........: Disabled
 18) High Risk Factor Check.......: High Risk Disabled
 19) Import CPT-coded Visits......: Enabled
 20) Visit Selection Menu.........: Disabled (Link Visits automatically)
 21) Flu Season Start & End Dates.: 07/01 to 06/30
Select Action: Quit//
```

Figure 5-6: Edit Site Parameters screen

The site parameters are defined as follows:

- **Default Case Manager:** The Case Manager who is presented automatically as a default at all **Case Manager** prompts, such as when you are adding a new patient.
- **Other Location:** An entry in the **IHS Location** file that is designated as the **Other Location** for a **PCC Visit** when the location is not in the **Location** file (e.g. private doctor).

- **Standard Imm Due Letter:** The form letter that is sent to patients or their parents informing them of which immunizations are due next. It may also contain information about where and when to receive the next immunizations. The letter selected here is presented as the default letter to use when printing **Due Letters**. To select the letter for this **Site Parameter**, it must already have been created with the **LET** option on the **Manager Menu (MGR > LET)**. Create a new letter named **Standard Due Letter** and then return to this site parameter to choose it.
- **Official Imm Record Letter:** The letter that presents all of a patient's immunization information and is generally sent to schools, parents, other clinics, etc. The letter selected here is used as the patient's **Official Immunization Record** whenever users select that action. To select the letter for this **Site Parameter**, it must already have been created using the **LET** option on the **Manager Menu (MGR > LET)**. Create a new letter named **Official Immunization Record** and then return to this site parameter to choose it.
- **Facility Report Header:** The name of your site or institution as you want it to appear at the top of various reports and screens throughout this software goes into the **Facility Report Header**. (This may be the same as the **Site Name** that appears on some screens, however, that name is often an abbreviated form of the site name).
- **Host File Server Path:** The directory on the **Host File Server** where files to be imported and exported are stored. Include all necessary slashes in the path name (everything except the filename itself). For example: **C:\TEMP** (on a PC).
- **Minimum Days Last Letter:** The least number of days that must pass after a patient letter is printed before the software automatically prints another letter to the same patient. The software does not print a second Due Letter within the default number of days since the last one was generated. The Case Manager can change this number when printing Due Letters and you can print an individual letter at any time.
- **Minimum vs. Recommended Age:** Allows you to direct the **ICE Forecaster** software to forecast immunizations due at either the **Minimum Acceptable Patient Age** or at the **Recommended Age** (e.g.10 weeks of age vs. 4 months of age).

  Note: This affects all vaccines when you change it.

- **4-Day Grace Period Option:** The ACIP recommends that vaccine doses administered four days or less before the minimum interval or age be counted as valid. (Not all states accept this **4-Day Grace Period**). The Forecasting Rules allow you to choose **YES** if you want to screen using the **4-Day Grace Period** or to choose **NO** to adhere strictly to the recommended intervals.

  Note: The **4-Day Grace Period** does not affect vaccine forecasting, only screening for the validity of the dose administered.

- **Lot Numbers Options: Lot number Required** indicates whether lot numbers are required when entering **Immunization Visits (Yes)** or should be **Optional (No)**. If lot numbers are required when entering **Immunization Visits**, enter **YES** for this parameter. If lot numbers are **Optional**, enter **NO**.

> **Note:** Lot numbers are not required for Immunizations with a category of **Historical Event**, even if this site parameter is set to **Yes**.

- **Lot Number Low Supply Alert:** When the number of remaining doses of a given lot falls below its **Low Supply Alert** (set by the manager when editing **Lot Numbers**), a **Low Supply Alert** pops up on the screen as a user is adding or editing an immunization with that particular **Lot Number**.

  The number entered here, under the **Site Parameters**, is the **Low Supply Alert DEFAULT**. In the absence of a specific **Low Supply Alert** for a given **Lot Number**, this **Default** is used.

> **Note:** No alert occurs if a **Starting Amount** is not entered for the particular lot number in the **EDIT LOT NUMBER TABLE**.

- **Pneumo Routine Age to Begin:** This allows choices for which adult immunizations are to be routinely forecast for pneumococcal vaccine at what ages. Pneumococcal vaccine is typically routine at 65 years
- **Other Adult Vaccine Options: Tdap** is forecast in all persons 11 years and older if they have not received **Tdap**, regardless of interval since receipt of **Tdap**. **Hep A** and **B** are forecast in 19 years and older only in persons who have received a prior dose; **Option 11** does not forecast **Hep A** or **Hep B** in adults.
- **Forecasting (Imms Due):** Indicates whether the **ICE Forecaster** software is properly installed (**Enable**) or not (**Disable**). If the **ICE Forecaster** software is properly installed and **Immunizations Due** should be forecast when viewing and editing patient histories, printing Due Lists, and so on, choose **Enable**. If the **ICE Forecaster** software is not installed, choose **Disable**. If at any point a forecasting error occurs, this is due to a problem with the **ICE Forecaster** software. In this case, either the **ICE Forecaster** software should be re-installed (see **Installation Notes** in the *Immunization Module (BI) Technical Manual*), or this parameter should be disabled until the problem is corrected by technical support.
- **Chart Number with Dashes:** Indicates whether chart numbers (**Health Record Numbers**) are displayed with dashes throughout the **Immunization Module**.
  - Chart number displayed without dashes: 12345
  - Same Chart number displayed with dashes: 01-23-45

- **User as Default Provider:** When entering new immunizations or new skin tests through the **Immunization Module**, it is possible to have the user appear as the **Default Provider**. In other words, when the screen for a new visit first comes up, the Provider field is already filled with the user's name. (The user is the person logged on and entering the data).

  This only occurs if the user is a provider (has the **Provider Key**). This does not occur on edits of pre-existing visits.

- **IP Address for ICE Forecaster:** Enter the **IP address** of the server hosting the **ICE Forecaster**. A typical installation has a forecaster running on the same machine as **Ensemble**, **EHR**, and **RPMS**. In that case the address would be **127.0.0.1** (which is the default). However, if your network is configured correctly, RPMS can access the **ICE Forecaster** hosted on another machine at a different IP address.

  – **AIX: /usr/local/**

  – **NT/XP: C:\Program Files**

- **GPRA Communities:** This allows the **Immunization Program Manager** to build and maintain a list of communities to be used for GPRA purposes in reports, patient scans, and so on. This list is not affected by other **RPMS GPRA** software.

- **Inpatient Visit Check:** When an **Immunization Visit** or **Skin Test Visit** is stored, the default visit category is **Ambulatory (Outpatient)**. However, if the **RPMS PIMS (Patient Information Management System)** or various billing applications are in use, the patient may have the status of **Inpatient** at the time of the visit.

  To avoid conflicts that may arise from inpatient and ambulatory visits being listed for the same day, this software can check the **Inpatient Status** of the patient at the time of the immunization or skin test. If the patient is listed as an inpatient at the time of the immunization, the software can automatically change the category from **Ambulatory** to **Inpatient** for the immunization.

  Turn this feature on by setting **Inpatient Visit Check** feature to **Enable**. If **Inpatient Visit Check** is causing problems, however, (such as conflicts with **Third-Party Billing** software), then set the **parameter** to **Disable** and no **Inpatient Visit Check** occurs.

- **High Risk Factor Check:** When forecasting immunizations for a patient, this program looks at the patient's medical history (visits) and attempts to determine if the patient has an increased risk (Figure 5-7) for **Pneumococcal disease**, **Hepatitis A**, **Hepatitis B**, **COVID or Recombinant Zoster Vaccine**. If the patient has had one or more visits in the past three years for a High Risk medical condition, the program forecasts in the patient's record as due for one or both of those immunizations. It will also forecast by age for Meningococcal B, RSV and HPV. This parameter either enables or disables that risk check.

```
0 - None
1 - Pneumo for High Risk history
2 - Hep B for Diabetes Mellitus
3 - Hep A and Hep B for CLD/Hep C
4 - COVID Immunocompromised
5 - Men B for 16 to 23 yrs
6 - RSV for 60 to 74 yrs
7 - HPV for 9 to 10 yrs
8 - RecombZV for 19 to 49 yrs
```

Figure 5-7: High Risk Factor Check screen

- **Import CPT-Coded Visits:** In RPMS, it is possible for some immunizations to be entered by **CPT Code** into the **CPT Visit** file, rather than into the true **Immunization Visit** file. These **CPT-Coded** immunizations do not appear on the patient's **Immunization Profile**, nor are they always included in the **Immunization** package reports.

  When the **Import CPT-Coded Visits** site parameter is enabled, those immunizations that are entered only as **CPT Visits** are checked and automatically entered into the proper **Immunization Visits File** if they are not already there.

  If this parameter is disabled, the program makes no attempt to bring **CPT-Coded Visits** into the immunization files.

- **Visit Selection Menu:** When adding or editing immunizations, this program will either create a **NEW Visit** or link the immunization to an **EXISTING Visit**. This process can be occurring automatically, or it can be controlled by the user at the time the immunization is being entered.

  If the **Visit Selection Menu** is **DISABLED**, the program will look for similar visits for the patient on that day and attempt to link with one if enough information matches. If no such visits exist, a **New Visit** will be created automatically. (This can sometimes lead to visits that are incorrectly linked and must be corrected manually.)

  If the **Visit Selection Menu** is **ENABLED**, the program will look for similar visits, and if any exist, a **Visit Selection Menu** pop ups. The **Visit Selection Menu** will allow the user to either create a **New Visit** or select from **Existing Visits** for that day. (If there are no **Existing Visits**, a new visit will be created automatically.)

- **FLU Season Start & End Dates:** Select the **Start** and **End Dates** for the **Influenza Season**. Enter the dates in the numeric form: **mm/dd**. For example, July 01 would be entered as **07/01** and June 30would be entered as **06/30**.

5.7 Package Information (PKG)

This option displays information about the Immunization Module v8.5. It addresses software options and access to them, device information, handling of the old software, and reference to site parameters. Information in this **Manager Menu** option is intended for use by the module manager and the local/site programmer in setting up the new module and maintaining it. Figure 5-8 provides an example of this screen.

```
(Immunization v8.5)          Aug 22, 2011 11:14:53          Page: 1 of   17

              PACKAGE INFORMATION for IMMUNIZATION, Version 8.5

     The text presented here is intended to provide Site Managers with
     helpful information regarding setup and management of the RPMS
     Immunization package, version 8.2.

     I. OPTIONS
     ----------

     The main menu option for the Immunization package is BIMENU.
     At most sites this would be placed on AKMOCORE along with other
     RPMS packages. For the sake of consistency from site to site,
     it is recommended that the synonym "IMM" (Immunization) be
     given to the main menu option BIMENU, however, this is not a
     requirement. BIMENU allows access to every other option within
+         Scroll down to view more. Type ?? for more actions
Select Action: Quit//
```

Figure 5-8: Module Information for Immunization

5.8 Form Letters Add/Edit (LET)

This option allows the manager to edit current form letters or create and save new form letters to use under the **Letter Print Action** on the **Patient View** screen or the **Immunization Lists and Letters** screen.

When you choose to add a new form letter this program loads a sample form letter, which you may then edit to suit the purpose of your new form letter. There are two sample form letters:

- Standard Due Letter
- Official Immunization Record

After you select a form letter, it is displayed on the **View/Edit Form Letter** screen where you can edit and save it as your new form letter.

The **View/Edit Form Letter** screen allows you to customize form letters. The top section of the screen displays the name of the form letter.

The middle section of the screen displays the body of the letter in a scrollable region. Use the **Up** and **Down Arrow** keys to view all parts of the letter.

The bottom section of the screen lists actions you can take to edit sections of the letter or to print or delete the letter.

Fields in the letter appear in uppercase text within vertical bars, such as |**PATIENT NAME**|. These fields may be moved within the letter or they may be deleted. However, the text within the vertical bars must not be altered.

The form letter is divided into seven sections, as shown in Figure 5-9. You can edit any portion of the sample letter to create your new form letter by entering the letter or word of the section (e.g., **T - Top**) at the prompt.

```
Top:
                                UNSPECIFIED Immies Clinic
123 MAIN ST
ANWHERE, USA  77777
[BI TODAY]

                                         Date of Birth: [B1 DATE OF BIRTH]
                                               Chart #: [B1 CHART NUMBER]
  |BI PARENT/GUARDIAN|
  |BI NAME FIRST LAST|
  |BI MAILING ADD-STREET|
  |BI MAILING ADD-STREET-2|
  |BI MAILING ADD-CITY STATE ZIP|
  Dear Parent or Guardian:
  Your child, |BI NAME FIRST|, is due for immunizations.
-----------------------------------------------------------------------------
middle:

  |BI NAME FIRST| will be due for the immunizations listed below:
-----------------------------------------------------------------------------
forecast:

  DTP
  HEP B VAC
-----------------------------------------------------------------------------
bottom:
  If you feel our records are not correct, please notify us so that we may
make the corrections to update our records. Otherwise, please come to our
clinic. We would appreciate you bringing your personal immunization records
so that we can update our records as well.
-----------------------------------------------------------------------------
date/location:

  10-Dec-1994  at UNSEPECIFIED Clinic, UNSPECIFIED Medical Center
-----------------------------------------------------------------------------
closing:
  Sincerely,

  Dr. Ralph Avritt
-----------------------------------------------------------------------------
+    Scroll down to view more. Type ?? for more actions
  T  Top            F   Forecast      C   Closing
  H  History        B   Bottom        P   Print Sample Letter
  M  Middle         D   Date/Loc      X   Delete Form Letter
Select Action: Quit//
```

Figure 5-9: Form Letter Add/Edit screen

5.8.1 Form Letter Section Descriptions:

- **T–Top:** The **Top** section of the letter contains your **address**, **today's date**, and the **patient's name**, **chart number**, and **address**. You may edit any information of the Top using the **Word Processor Help** instructions, Today's date, the patient's name, address, phone number, and date of birth appear automatically as noted by the appropriate text inside brackets (e.g., **[TODAY]**).

> **Note:** In version 8.1*1 patch, the letters were enhanced to allow printing of a patient's second address line, if they have one. The **|BI MAILING ADD-STREET-2|** line must be added manually to any existing letters, if this information is desired. Newly created form letters automatically have the patient's second address line.

  H–History: The immunization history has been removed in the standard due letter for the child and adult due to HIPPA purposes.

- **M–Middle:** The **Middle** section of the letter is free text. You can edit any portion of the middle section.
- **F–Forecast:** The **Forecast** section of the letter contains the immunizations for which the child is due on the **Forecast/Clinic** date chosen in **Immunization Lists and Letters**. The **Forecast** does not show the series number, only the vaccines for which the patient is due. You may choose to omit the **Forecast**.
- **B–Bottom:** The **Bottom** section of the letter is also free text. It can contain a line that reads: **Current Next Appt: |BI NEXT APPOINTMENT|**. If your site is running **RPMS Scheduling**, this field includes the patient's next scheduled appointment. If your site is not running **RPMS Scheduling**, this line does not print the patient's next appointment.
- **D–Date/Loc:** The **Date/Loc** section of the letter gives the patient the **Date** and Location for the **Immunization Clinic** and can be used to request that the patient visit a specific clinic. This is a special section that may be edited by the user (clerk or clinic staff) at the time the letter is sent. It allows clinical staff to change the date, time, and location of an appointment on the fly when printing the letter without giving them access to edit the other 6 sections of the form letter. If you want to have the patient call for an appointment, you can include that message (e.g., Call the **Children's Clinic, 729-1000**, for an appointment to get your child's immunizations update.) in the bottom section and you can eliminate this portion of the letter.
- **C–Closing:** The **Closing** section contains your name and the name of the clinic. You may edit this section.

5.9 Lot Number Add/Edit (LOT)

With this option, the manager can add or edit a current lot number for any vaccine in the vaccine table (Figure 5-10). It includes a lot number inventory monitoring system. When the pharmacist/manager enters a lot number, they input the expiration date, source (**VFC**, **non-VFC**), available doses, unused doses, as well as a lot-specific low supply alert. The doses unused decreases each time a vaccine of that lot number is entered in RPMS as having been administered to a patient. The provider receives an alert notice if they enter an expired vaccine lot, or if the supply is low.

```
                                PARKER HOSP                          page
1
                              -------------
                             LOT NUMBER TABLE
                           (Listed by Lot Number)


  #  Lot Number        Vaccine     Status  Exp Date  Start Unused  Facility
==============================================================================
  1  122522............FLU-IIV4....Active..01/01/24
  2  280888............COV,Mod.....Active..03/14/24
  3  1234567...........PNEUMO-PS...Active..12/31/26
  4  1805028...........COV,Jsn.....Active..01/01/26
  5  004M20A...........COV,Pfr.....Active..10/03/22
  6  038K20A*PINON.....COV,Mod.....Active..01/02/24
  7  048C21A...........COV,Mod.....Active..12/31/22.. 300.. 298
  8  053C21A...........COV,Mod.....Active..12/31/22.. 300.. 299
  9  123456B...........COV,Jsn.....Active..02/01/23
 10  12EE345...........H1N1-NASAL..Active..01/01/25
 11  278G7............MMRV........Active..12/31/24
 12  299A21A...........COV,Jsn.....Active..01/01/69
 13  45B678............PCV-20......Active..12/31/24
+         Enter ?? for more actions
A  Add a Lot Number    E  Edit a Lot Number    D  Display Inactives Yes/No
C  Change List Order   S  Search List          I  Inactivate Old Lots
                                               H  Help
Select Action: Quit//
```

Figure 5-10: Lot Number screen

The **Lot Number Table** always is listed with the group of all **ACTIVE Lot Numbers** first, followed, optionally, by all **INACTIVE Lot Numbers**. However, within those two groups you may select the order in which the Lot Numbers are displayed (Figure 5-11), as follows:

```
    1) By Unused Doses (least first)
    2) By Expiration Date
    3) By Lot Number
    4) By Vaccine Name, then by Unused Doses
    5) By Vaccine Name, then by Exp Date
    6) By Vaccine Name, then by Lot Number

 Please select 1, 2, 3, 4, 5, or 6: 1//
```

Figure 5-11: Change List Order screen

In Figure 5-11, users can add and edit the eight fields of lot numbers.

- To add or edit a particular lot number, type **A** and then enter the **lot number**. If the lot number already exists in the table, that lot number is displayed, and you can edit its fields. Type E to edit an existing lot number if necessary.
- Alternatively, as a shortcut, you may search for the lot number by typing **S** and then enter the **lot number** at the prompt. Once it finds the lot number, it will ask if you want to stop the search at that lot number or continue forward.
- Lastly, you may automatically inactivate all lot numbers that either have expired or have no expiration date by typing **I**.

The fields for each lot number are **Lot Number** and **Sub-lot**.

- The **Sub-lot** field is added to the **Add/Edit Lot Number** screen. **Lot Number** and **Sub-lot** are presented as two different fields, edited independently. The program then concatenates them using an asterisk (*****) as a delimiter. Edit prompts check and prevent the user from including an asterisk (*****) as part of the **Lot** or **Sub-lot**.

  The total length is also monitored, informing the user of how many characters are **left** for the **Sub-lot**, given the lot number length (the total may not exceed **12 characters**).

- In **Reports** and **Patient Data** screens, the lot number combination (delimited by an asterisk (*****)) appears as a single entity for selection and sorting (eg. **3334V*A**). The combination can be assigned to a facility, limiting selection of that lot-sub-lot combination to users logged on to that facility. The **Lot-Sub-lot** combination can also be inventoried as a single, distinct entity (for use by distinct facilities or programs).
- If no **Sub-lot** is entered, then the **Lot Number** and **Lot Number For Export** are the same, no asterisk (*****) appears in the **Lot Number**, and **Sub-lot** is not an issue.
  - **Vaccine:** This is the vaccine to which the lot number is assigned. A vaccine is required when entering a new lot number.

- **Manufacturer (MVX):** This is the standard **CDC/HL7 Manufacturer Code** assigned to the company that produced the Lot. Enter **??** to view the entire **Manufacturer Code** list. A manufacturer is required when entering a new lot number.
- **Status:** If a lot number is set to **Inactive**, users cannot select it when entering new patient immunizations for this vaccine. However, previous immunizations with this lot number continue to show up on the patient histories.

Also, if you attempt to enter a lot number for a vaccine that is **Inactive**, a pop-up alert appears notifying you that the vaccine must first be made **Active** or you must select a different vaccine.

- **NDC Code:** The **National Drug Code (NDC)** is a unique product identifier used in the United States for drugs intended for human use. If there are one or more NDC codes associated with a lot number, you can have them auto-display by typing **??** at the prompt.
- **Expiration Date:** This is the date that the lot expires.
- **Vaccine Source:** Is the **Funding Source Code** (Figure 5-12) required by the **State Immunization Information System (SIIS)**. The following codes must be added in this field and is dependent on what the SIIS requires for the vaccine. The user will need to contact the SIIS to make sure this is accurate and prevent a rejection of the immunization.

```
v        VFC
n        NON-VFC
o        Other State
i        IHS/Tribal
VXC1     Federal funds
VXC2     State funds
VXC3     Tribal funds
VXC50    Public
VXC51    Public VFC
VXC52    Public non-VFC
PHC70    Private funds
PHC68    Military funds
OTH      Other
UNK      Unspecified
```

Figure 5-12: Funding Source Codes screen

- **Starting Count:** Total number of **doses** in the starting inventory for the lot when it was first received.

- **Doses Unused:** Number of **doses** of a lot **remaining** or **unused**. This number decreases each time an immunization using that lot number is entered into RPMS through the **Immunization** package or data entry. The pharmacist or user can also reset this number if it becomes incorrect, such as might occur with wasted doses, data entry errors, and so on.

> **Note:** This number can be negative. A negative number for the **Unused Amount** indicates that deletions, data entry errors, or testing caused by subtraction each time the lot number is used in the computer – even if it is not actually used clinically. Therefore, it is entirely appropriate for the vaccine manager or pharmacist to correct the **Number Unused** to reflect the actual number of doses remaining in inventory (in other words, sitting on the shelf).

- **Health Care Facility:** Adding a **Health Care Facility** to a lot number causes that lot number to become unavailable for any user who is not logged on to the named facility.

In general, there is no need to assign lot numbers to specific facilities. However, if more than one facility uses the same computer (such as dialing in from remote sites), then it may be desirable to assign lot numbers to specific facilities. Then users from another facility are prevented from erroneously using a lot number not assigned to their facility.

In cases where a lot number is shared by multiple facilities using the same computer, it may be desirable to create **Sub-Lots** by appending **a**, **-a**, **-b**, **-c**, and so on, to the lot number. For example, **Facility A** would get **#1234-a**, **Facility B** would get **#1234-b**, **Facility C** would get **#1234-c**, and so on.

This enables the manager or pharmacist to assign a starting amount for each Sub-Lot to each facility and ensure that the inventory at each site is accurate. Figure 5-13 shows the screen for adding or editing lot numbers.

```
Imm v8.5                * * *  ADD A LOT NUMBER  * * *

      Lot Number:
_____________________________________________________________________

  Lot Number:                        Vaccine:
          Sub-lot:

           Status:              Manufacturer:
  Expiration Date:                    Source:
         NDC Code:

   Starting Count:         Doses Unused:         Doses Used:
 Low Supply Alert:                               (calculated)

         Facility:
_____________________________________________________________________
```

```
Enter/edit the Lot Number.
```

Figure 5-13: Lot Number Add/Edit screen

5.9.1 New Lot Numbers

When lot numbers contain a mixture of letters and numbers, use all capital (uppercase) letters for lot numbers. Choose the manufacturers from the standard **Manufacturer's list**. Type **??** to obtain the entire list.

5.9.2 Duplicate Lot Numbers

For several years, now, the software has not permitted duplicate lot numbers to be entered. In general, this is no longer an issue. However, in the event that duplicate lot numbers should show up on your system, there is a method to resolve the problem.

To Resolve Duplicate Lot Numbers

1. In the **RPMS Immunization Manager Menu > Lot Menu > Enter the Lot Number** in question. Two or more choices are presented. You may need to change the display to include **Inactive Lot Numbers**.
2. Edit the **Lot Number** with the incorrect vaccine linked to the Lot Number.
3. Select and edit each **Lot Number** as needed (Figure 5-14). In the **Sub-Lot** field, type **DO NOT USE** (for example, change **483116** to **483116*DO NOT USE**).
4. Change the status to **Inactive**.
5. Save the **changes**.

```
Lot Number: 483116
Sub-Lot: DO NOT USE
Status: Inactive
```

Figure 5-14: Edit Lot Number example

6. If patients have documentation in their legal health record with the **Do Not Use Lot Number** in RPMS:
   a. Go to **Imm > Patient Menu (PAT) > List and Letters (LLS)**.
   b. Generate a report for the specific **Lot Number(s)** marked as **Do Not Use** in order to update each patient vaccine record to the correct **Lot Number**.

5.10 Vaccine Table Edit (VAC)

By using the **Vaccine Table Edit** option, the manager can edit four parameters of any vaccine. Figure 5-15 shows a sample of the table. Selecting **Change List Order** from the **Action Menu** below changes the sort order of the list between alphabetical (by name) and numerical (by **CVX Code**).

```
Immunization v8.5          May 19, 2025 09:18:40          Page:    1 of   20

                              PARKER HOSP
                              -------------
                            EDIT VACCINE TABLE

 #  Vaccine      CVX    Active     Lot# Dflt      VIS Dflt   Vol Dflt  Forecast
 1  ACTHIB......(48)...Active...................07/24/23..  0.5 ml ...YES
 2  ADENO,oral..(143)..Inactive.................01/08/20.............YES
 3  ADENOV,NOS..(82)...Inactive.............................  0.5 ml ...YES
 4  ADENOVI,T4..(54)...Inactive.............................  0.5 ml ...YES
 5  ADENOVI,T7..(55)...Inactive.............................  0.5 ml ...YES
 6  ANTHRAX.....(24)...Inactive.................01/08/20..  0.5 ml ...YES
 7  Anthrax IG..(181)..Inactive.......................................YES
 8  Anthrx AJV..(318)..Active...................01/08/20..  0.5 ml ...YES
 9  Anthrx,NOS..(319)..Inactive.......................................YES
10  AS03,ajv....(801)..Inactive.......................................YES
11  BCG.........(19)...Inactive.............................  0.5 ml ...YES
12  BOTULINUM...(27)...Inactive.............................  0.5 ml ...YES
13  Chik-VLP....(329)..Active...............................  0.8 ml ...YES
+         Scroll down to view more. Type ?? for more actions
E  Edit Vaccine          C  Change List Order      H  Help
                         F  Forecasting            P  Print List
Select Action: Quit//
```

Figure 5-15: Vaccine Table Edit screen

To edit a particular vaccine, type **E**, then select the **left-column number** that corresponds to the vaccine you want to edit. The screen shown in Figure 5-16 is displayed.

```
Imm v8.5                  * * *  EDIT A VACCINE  * * *

  Vaccine: DTaP  (DTAP)

  HL7/CVX: 20          Vaccine Group: DTORP

     Default Lot#:

           Status: Active

 VIS Default Date: JUL 24,2023

   Default Volume: .5   ml

Select the Lot Number that should be the default for this vaccine.
```

Figure 5-16: Vaccine Edit screen

This screen includes the following fields:

Status: If a vaccine is set to Inactive, users cannot enter new patient immunizations for this vaccine. However, previous immunizations with this vaccine continue to appear on the patient histories. The Program Manager should inactivate extra vaccines in a vaccine group (e.g. HepA NOS, HepB NOS), to minimize the number of vaccine options for providers.

- **Default Lot#:** This is the **Lot#** default that is automatically entered in the **Lot#** field for this vaccine when users add new immunizations for patients. The user, of course, can overwrite or delete the default if it is not correct.
- **VIS Default Date:** This is the **Vaccine Information Statement (VIS)** default **Date** (**Date of Publication**, not date given to patient). It gets entered automatically in the **VIS Date** field when users add new immunizations for this vaccine.
- **Default Volume:** This is the default volume of the injection for the given vaccine. It gets entered automatically in the volume field when users are adding new immunizations for this vaccine.

5.10.1 Forecasting

For each **Vaccine Group**, forecasting may be turned on or off. This is done from the **Edit Vaccine Group Forecasting** screen. The **Forecast** column indicates whether a vaccine is forecasted (listed as due for patients) or not. Each vaccine belongs to a **VACCINE GROUP**, for example, the **HEP A GROUP**. Turning **OFF** forecasting for the **HEP A VACCINE GROUP** blocks all forecasting of any vaccines that contain **Hep A** vaccine. To change forecasting for a vaccine group, select the **Forecasting Action** at the bottom of the screen shown in Figure 5-17.

```
Immunization v8.5        May 19, 2025 08:36:31         Page:    1 of 2

                                PARKER HOSP
                               -------------
                        EDIT VACCINE GROUP FORCASTING

   #  Vaccine Group    Forecast
   #  Vaccine Group    Forecast
   1  Anthrax..........YES
   2  CHIKA............YES
   3  COVID............YES
   4  DTORP............YES
   5  FLU..............YES
   6  H1N1.............NO
   7  H5...............YES
   8  HEPA.............YES
   9  HEPB.............YES
  10  HIB..............YES
  11  HPV..............YES
  12  MENING...........YES
  13  MENING-B.........YES
  14  MMRORME..........YES
  15  OORIPV...........YES
  16  ORTHOPOX.........YES
  17  OTHER............YES
  18  PNEUMO...........YES
  19  ROTAVIRUS........YES
  20  RSV..............YES
  21  TD_B.............YES
  22  VAR..............YES
  23  ZOSTER...........YES
          Scroll down to view more. Type ?? for more actions
                                C  Change Vaccine Group
Select Action: Quit//
```

Figure 5-17: Vaccine Table Edit Forecasting screen

Note: Combination vaccines cannot be forecast specifically–their component vaccines are forecast (if the patient is due). Use of combination vaccines is an option open to the provider. Inputting combination vaccines into the patient's history satisfies the requirements of the component vaccines.

5.11 Eligibility Table Edit

Screening to determine a patient's eligibility to receive vaccines either through the **VFC** program or another program must take place with each immunization visit. The eligibility table will allow the user to make changes to the status and local text of the eligibility codes. This will make it simple to document accurately in the **Immunization Component** of the RPMS. There are **7 VFC** eligibility codes listed in this table. There are 6 slots available to use for each State and Federal territory. This allows a user to add additional information within these slots that are deemed necessary by their State.

5.12 Restandardize the Vaccine Table (RES)

The **Immunization** package v8.4 comes includes a **Vaccine Table** (**Immunization File**), which is standardized with **HL7/CVX** codes consistent with the **CDC's NIP** (**National Immunization Program**) **CVX Code** set. There are several fields in the Vaccine Table that relate to functions in the package, most notably the **ImmServe Forecasting** utility. For this reason, it is critically important that specific fields in the table are not altered.

Each time a user logs into the **Immunization** package, the **Vaccine Table** is checked for integrity. If certain fields are altered, a warning message is issued, and several functions within the package begin to display the warning. Some basic functions of the package continue to operate, such as the display of a patient's immunization history. Other functions only display the warning.

Figure 5-18 shows the text of the warning.

> **Note:** The last paragraph does not appear if the user does not have the **BIZ MANAGER** key.

As the warning indicates, re-standardizing the table simply involves selecting **RES** from the **Manager Menu**. This can be done at any time, and users need not log out of the package. Runtime lasts a few seconds at most.

```
WARNING

Vaccine Table (IMMUNIZATION File) is not standard--cannot proceed.
At this point you should back out of the Immunization package
and contact your Site Manager or the person in charge of the
Immunization Software.

Or, you may fix this by Restandardizing the Immunization file.
To do so, proceed to the Manager Menu and select Restandardize.
(Menu Synonyms: MGR > RES)
```

Figure 5-18: Warning message

5.12.1 Export Immunizations (EXP)

This program allows you to select a group of patients and to export their demographic and immunization data either to a file or to your screen (for capture by a PC).

You can either select individual patients (by name or chart number) or select a group of patients by specifying status in the **Register**, **Visit History**, **Age Range**, **Facility**, and **Current Community**. You can also limit the data export to specific vaccines.

You can either export the data in an **ASCII** text format or **ImmServe** data format.

At the **Manager Menu**, type **EXP** at the **Select Manager Menu Option** prompt to display the **Export Immunization Records** screen shown in Figure 5-19.

```
Immunization v8.5
                    *   EXPORT IMMUNIZATION RECORDS   *

Do you wish to:

1) Select patients INDIVIDUALLY by entering their Names or Chart Numbers
 Or
2) Select patients by GROUP, specifying Age Range, Status, Current
Community, etc.

Enter either 1 or 2:
```

Figure 5-19: Export Immunizations screen

5.12.2 Export Patients Individually

To export patients individually, type **1** at the Enter Either 1 or 2 prompt. A screen similar to the one shown in Figure 5-20 is displayed.

```
Immunization v8.5*                                        Page:    1 of    1

                        EXPORT DATA BY INDIVIDUALS

    1 - Survey Date..............: 18-Mar-2025

    2 - Patients.................: None

    3 - Immunizations Received...: ALL

    4 - Data Elements............: None

    5 - File Format..............: ASCII

    6 - Output Device............: SCREEN
        □

         Select a left column number to change an item.
                              Export Data
Select Action: Quit//
```

Figure 5-20: Export patients individually screen

- **Data Element (#7):** This selection only pertains to exports with **ASCII format**. **(HL7** and **ICE Forecaster Data Elements** are predetermined). The very first (or top) record lists, by title, the selected data elements (or fields) in the order in which they occur in the records.

> **Note:** Immunization v8.5 contains some additional data elements (75 in all). Of particular significance to users who export data to CASA (an immunization program analysis tool) is the data element: **VACCINE CODE**, **HL7-CVX LEADING ZERO**. This places a leading zero at the beginning of any single-digit **HL7-CVX** code, which is a requirement of the **CASA** software.

- **File Format (#5):** You may export records in either **ASCII**, **ICE Forecaster** format. **ASCII format** positions the data elements you specify for each immunization on a separate line or record. Data elements are separated by quote-comma-quote (known as a **CSV** file). **ICE Forecaster** is a commercial, vendor-specific format of use only to programmers working with this software.
- **Output Device (#6):** You can export the data to your screen or to a file. Export to your screen (PC) allows you to view it and then save it as a file. Export to a file allows you to copy it to a disk or transmit it to another computer for processing. When you select **File** and are asked to name it, your filename must conform to the naming convention of your operating system without **slashes**, **colons**, or **spaces**. The path is set in the **Site Parameters** (**MGR > ESP**) by your Site Manager or Program Manager.

5.12.3 Export Data by Group

This screen provides options for exporting the data of groups of patients. There are nine screen options that you can change to specify which patients and data are to be exported, as well as the output device for the export.

You are asked whether you want to select patients individually or by group. Type **2** (select patients by group) to display the screen shown in Figure 5-21.

```
                          EXPORT DATA BY GROUP

  1 - Survey Date.............: 01-Apr-1999
  2 - Age Range...............: 1-72 Months
  3 - Patient Group...........: ACTIVE in the Register.
  4 - Health Care Facility....: ALL
  5 - Community...............: ALL
  6 - Immunizations Received..: ALL
  7 - Data Elements...........: None
  8 - File Format.............: ASCII
  9 - Output Device...........: SCREEN

         Select a left column number to change an item.
```

```
                                Export Data                                Select
Action: Quit//
```

Figure 5-21: Export Data by Group screen

- **Data Element (#7):** This selection only pertains to exports with **ASCII format**. (**HL7** and **ICE Forecaster Data Elements** are predetermined). The very first (or top) record lists, by title, the selected data elements (or fields) in the order in which they occur in the records.

> **Note:** Immunization v8.5 contains some additional data elements (75 in all). Of particular significance to users who export data to **CASA** (an immunization program analysis tool) is the data element: **VACCINE CODE**, **HL7-CVX LEADING ZERO**. This places a leading zero at the beginning of any single-digit **HL7-CVX** code, which is a requirement of the **CASA** software.

- **File Format (#5):** You may export records in either **ASCII**, **ICE Forecaster** format. **ASCII format** positions the data elements you specify for each immunization on a separate line or record. Data elements are separated by quote-comma-quote (known as a **CSV** file). ICE Forecaster is a commercial, vendor-specific format of use only to programmers working with this software.
- **Output Device (#6):** You can export the data to your screen or to a file. Export to your screen (PC) allows you to view it and then save it as a file. Export to a file allows you to copy it to a disk or transmit it to another computer for processing. When you select File and are asked to name it, your filename must confirm to the naming convention of your operating system without slashes, colons, or spaces. The path is set in the **Site Parameters (MGR > ESP)** by your Site Manager or Program Manager.

5.12.4 Export by Group

This screen provides options for exporting the data of groups of patients. There are nine screen options that you can change to specify which patients and data are to be exported, as well as the output device for the export.

You are asked whether you want to select patients individually or by group. Type **2** (select patients by group) to display the screen shown in Figure 5-22.

```
EXPORT DATA BY GROUP

    1 - Survey Date.............: 01-Apr-1999
    2 - Age Range...............: 1-72 Months
    3 - Patient Group...........: ACTIVE in the Register.
    4 - Health Care Facility....: ALL
    5 - Community...............: ALL
    6 - Immunizations Received..: ALL
    7 - Data Elements...........: None
```

```
    8 - File Format.............: ASCII
    9 - Output Device...........: SCREEN

           Select a left column number to change an item.
                              Export Data                           Select
Action: Quit//
```

Figure 5-22: Export Data by Group screen

- **Patient Group (#3):** The **Patient Group** can only be one of the following:
  - Only patients who were active in the Immunization Register on the Survey Date.
  - Both active and inactive patients in the Immunization Register.
  - All patients who have had an immunization at the selected facility(s), including those not in the Immunization Register.
- **Health Care Facility (#4):** If you select specific health care facilities, only patients with at least one immunization at one of the selected health care facilities are included in the export.
- **Community (#5):** If you select for specific communities, only patients whose current community (under Patient Registration) is one of the selected communities are included in the export.
- **Immunizations Received (#6):** If you select for specific vaccines, only immunizations given with the selected vaccines are included in the export.

Other parameters are similar to those in the **Export Patients Individually** option.

5.13 Allocate/De-Allocate Imm Menu Keys (KEY)

This option allows the manager to give a user any one of three access levels to the system. Figure 5-23 shows the **Allocate/De-Allocate IMM Menu Keys** screen.

```
HOLDERS OF IMMUNIZATION KEYS AT INDIAN MED CTR
            ----------------------------------------------

   HOLDER             BIZMENU   BIZ EDIT PATIENTS   BIZ MANAGER   BIZ LOT
ONLY

   USER,CHRIS........YES
   USER,CYNTHIA ...............YES
   USER,LAZELL ................YES..................YES...........YES
   USER,ELLEN .................YES..................YES
   USER,BARBARA ...............YES
   USER,ALFRED ....... ........YES.................YES

+         Scroll down to view more.  Type ?? for more action

A  Add/Edit a Holder      E  Explanation of Keys    P  Print List

Select Action: Quit//
```

Figure 5-23: Allocation/deallocation of Immunization Keys screen

Use this option to assign the following security keys to users:

- **BIZMENU:** Provides users access to the Main Menu of the **New Immunization Module (BIMENU)** and its submenus for viewing patient data and reports. The **BIZMENU** key does not provide any add or edit capabilities; however, holders of this key may print patient letters, view patient data, and run reports.
- **BIZ EDIT PATIENTS:** Allows users to add and edit a patient's **Immunization History**, **Contraindications**, **Skin Tests**, **Parent/Guardian**, and so on. This key does not provide access to any additional menu options; instead, it adds several actions to the main Patient View screen. This key should be given to staff who are responsible for data entry and patient management.
- **BIZ MANAGER:** Allows managers to access the **Manager Menu (BI MENU-MANAGER)**, which is a submenu of the **Main Menu (BIMENU)**. The manager menu provides access to many sensitive functions pertaining to **Site Parameters**, **Form Letters**, the **Vaccine Table**, **Lot Numbers**, **Exports**, and the allocation of **Security Keys**. The **BIZ MANAGER** key should only be given to the manager of the **Immunization Module**.
- **BIZ LOT ONLY:** Allows someone, such as a pharmacist, to add and maintain the **Lot Number Inventory** without gaining access to the rest of the Manager Menu in the **Immunization** package. The menu option named **BI LOT NUMBER NON-MANAGER**, which is locked by the key **BIZ LOT NON-MANAGER**. This standalone option is not connected to the rest of the RPMS Immunization Menu. Instead, it can be assigned to any menu of any user for the purpose of adding and editing lot numbers in the **Immunization** package.

> **Note:** Assignment of this option, **BI LOT NUMBER NON-MANAGER**, to other menus in RPMS is done by the local Site Manager, as is the key, **BIZ LOT NON-MANAGER**. This option and its key cannot be assigned from within the **Immunization** package itself.

5.14 Export Vaccine Table to Excel File

Allows users to export Vaccine table to a file at **C:\TEMP\RPMS Vaccine Table.csv**. This is a precursor to downloading **Vaccine Reports** to an **Excel** file.

Appendix A Rules of Behavior

The Resource and Patient Management (RPMS) system is a United States Department of Health and Human Services (HHS), Indian Health Service (IHS) information system that is ***FOR OFFICIAL USE ONLY***. The RPMS system is subject to monitoring; therefore, no expectation of privacy shall be assumed. Individuals found performing unauthorized activities are subject to disciplinary action including criminal prosecution.

All users (Contractors and IHS Employees) of RPMS will be provided a copy of the Rules of Behavior (ROB) and must acknowledge that they have received and read them prior to being granted access to a RPMS system, in accordance with IHS policy.

- For a listing of general ROB for all users, see the most recent edition of *IHS General User Security Handbook* (SOP 06-11a).
- For a listing of system administrators/managers rules, see the most recent edition of the *IHS Technical and Managerial Handbook* (SOP 06-11b).

Both documents are available at this IHS website: https://home.ihs.gov/security/index.cfm.

> **Note**: Users must be logged on to the IHS D1 Intranet to access these documents.

The ROB listed in the following sections are specific to RPMS.

A.1 All RPMS Users

In addition to these rules, each application may include additional ROBs that may be defined within the documentation of that application (e.g., Dental, Pharmacy).

A.1.1 Access

RPMS users shall

- Only use data for which you have been granted authorization.
- Only give information to personnel who have access authority and have a need to know.
- Always verify a caller's identification and job purpose with your supervisor or the entity provided as employer before providing any type of information system access, sensitive information, or nonpublic agency information.
- Be aware that personal use of information resources is authorized on a limited basis within the provisions *Indian Health Manual* Part 8, "Information Resources Management," Chapter 6, "Limited Personal Use of Information Technology Resources."

RPMS users shall not

- Retrieve information for someone who does not have authority to access the information.
- Access, research, or change any user account, file, directory, table, or record not required to perform their *official* duties.
- Store sensitive files on a PC hard drive, or portable devices or media, if access to the PC or files cannot be physically or technically limited.
- Exceed their authorized access limits in RPMS by changing information or searching databases beyond the responsibilities of their jobs or by divulging information to anyone not authorized to know that information.

A.1.2 Information Accessibility

RPMS shall restrict access to information based on the type and identity of the user. However, regardless of the type of user, access shall be restricted to the minimum level necessary to perform the job.

RPMS users shall

- Access only those documents they created and those other documents to which they have a valid need-to-know and to which they have specifically granted access through an RPMS application based on their menus (job roles), keys, and FileMan access codes. Some users may be afforded additional privileges based on the functions they perform, such as system administrator or application administrator.
- Acquire a written preauthorization in accordance with IHS policies and procedures prior to interconnection to or transferring data from RPMS.

A.1.3 Accountability

RPMS users shall

- Behave in an ethical, technically proficient, informed, and trustworthy manner.
- Log out of the system whenever they leave the vicinity of their personal computers (PCs).
- Be alert to threats and vulnerabilities in the security of the system.
- Report all security incidents to their local Information System Security Officer (ISSO)
- Differentiate tasks and functions to ensure that no one person has sole access to or control over important resources.
- Protect all sensitive data entrusted to them as part of their government employment.
- Abide by all Department and Agency policies and procedures and guidelines related to ethics, conduct, behavior, and information technology (IT) information processes.

A.1.4 Confidentiality

RPMS users shall

- Be aware of the sensitivity of electronic and hard copy information and protect it accordingly.
- Store hard copy reports/storage media containing confidential information in a locked room or cabinet.
- Erase sensitive data on storage media prior to reusing or disposing of the media.
- Protect all RPMS terminals from public viewing at all times.
- Abide by all Health Insurance Portability and Accountability Act (HIPAA) regulations to ensure patient confidentiality.

RPMS users shall not

- Allow confidential information to remain on the PC screen when someone who is not authorized to that data is in the vicinity.
- Store sensitive files on a portable device or media without encrypting.

A.1.5 Integrity

RPMS users shall

- Protect their systems against viruses and similar malicious programs.
- Observe all software license agreements.

- Follow industry standard procedures for maintaining and managing RPMS hardware, operating system software, application software, and/or database software and database tables.
- Comply with all copyright regulations and license agreements associated with RPMS software.

RPMS users shall not

- Violate federal copyright laws.
- Install or use unauthorized software within the system libraries or folders.
- Use freeware, shareware, or public domain software on/with the system without their manager's written permission and without scanning it for viruses first.

A.1.6 System Logon

RPMS users shall

- Have a unique User Identification/Account name and password.
- Be granted access based on authenticating the account name and password entered.
- Be locked out of an account after five successive failed login attempts within a specified time period (e.g., one hour).

A.1.7 Passwords

RPMS users shall

- Change passwords a minimum of every 90 days.
- Create passwords with a minimum of eight characters.
- If the system allows, use a combination of alpha-numeric characters for passwords, with at least one uppercase letter, one lower case letter, and one number. It is recommended, if possible, that a special character also be used in the password.
- Change vendor-supplied passwords immediately.
- Protect passwords by committing them to memory or store them in a safe place (do not store passwords in login scripts or batch files).
- Change passwords immediately if password has been seen, guessed, or otherwise compromised, and report the compromise or suspected compromise to their ISSO.
- Keep user identifications (IDs) and passwords confidential.

RPMS users shall not

- Use common words found in any dictionary as a password.

- Use obvious readable passwords or passwords that incorporate personal data elements (e.g., user's name, date of birth, address, telephone number, or social security number; names of children or spouses; favorite band, sports team, or automobile; or other personal attributes).
- Share passwords/IDs with anyone or accept the use of another's password/ID, even if offered.
- Reuse passwords. A new password must contain no more than five characters per eight characters from the previous password.
- Post passwords.
- Keep a password list in an obvious place, such as under keyboards, in desk drawers, or in any other location where it might be disclosed.
- Give a password out over the phone.

A.1.8 Backups

RPMS users shall

- Plan for contingencies such as physical disasters, loss of processing, and disclosure of information by preparing alternate work strategies and system recovery mechanisms.
- Make backups of systems and files on a regular, defined basis.
- If possible, store backups away from the system in a secure environment.

A.1.9 Reporting

RPMS users shall

- Contact and inform their ISSO that they have identified an IT security incident and begin the reporting process by providing an IT Incident Reporting Form regarding this incident.
- Report security incidents as detailed in the *IHS Incident Handling Guide* (SOP 05-03).

RPMS users shall not

- Assume that someone else has already reported an incident. The risk of an incident going unreported far outweighs the possibility that an incident gets reported more than once.

A.1.10 Session Timeouts

RPMS system implements system-based timeouts that back users out of a prompt after no more than 5 minutes of inactivity.

RPMS users shall

- Utilize a screen saver with password protection set to suspend operations at no greater than 10 minutes of inactivity. This will prevent inappropriate access and viewing of any material displayed on the screen after some period of inactivity.

A.1.11 Hardware

RPMS users shall

- Avoid placing system equipment near obvious environmental hazards (e.g., water pipes).
- Keep an inventory of all system equipment.
- Keep records of maintenance/repairs performed on system equipment.

RPMS users shall not

- Eat or drink near system equipment.

A.1.12 Awareness

RPMS users shall

- Participate in organization-wide security training as required.
- Read and adhere to security information pertaining to system hardware and software.
- Take the annual information security awareness.
- Read all applicable RPMS manuals for the applications used in their jobs.

A.1.13 Remote Access

Each subscriber organization establishes its own policies for determining which employees may work at home or in other remote workplace locations. Any remote work arrangement should include policies that

- Are in writing.
- Provide authentication of the remote user through the use of ID and password or other acceptable technical means.
- Outline the work requirements and the security safeguards and procedures the employee is expected to follow.
- Ensure adequate storage of files, removal, and nonrecovery of temporary files created in processing sensitive data, virus protection, and intrusion detection, and provide physical security for government equipment and sensitive data.

- Establish mechanisms to back up data created and/or stored at alternate work locations.

Remote RPMS users shall

- Remotely access RPMS through a virtual private network (VPN) whenever possible. Use of direct dial in access must be justified and approved in writing and its use secured in accordance with industry best practices or government procedures.

Remote RPMS users shall not

- Disable any encryption established for network, internet, and Web browser communications.

A.2 RPMS Developers

RPMS developers shall

- Always be mindful of protecting the confidentiality, availability, and integrity of RPMS when writing or revising code.
- Always follow the IHS RPMS Programming Standards and Conventions (SAC) when developing for RPMS.
- Only access information or code within the namespaces for which they have been assigned as part of their duties.
- Remember that all RPMS code is the property of the U.S. Government, not the developer.
- Not access live production systems without obtaining appropriate written access and shall only retain that access for the shortest period possible to accomplish the task that requires the access.
- Observe separation of duties policies and procedures to the fullest extent possible.
- Document or comment all changes to any RPMS software at the time the change or update is made. Documentation shall include the programmer's initials, date of change, and reason for the change.
- Use checksums or other integrity mechanism when releasing their certified applications to assure the integrity of the routines within their RPMS applications.
- Follow industry best standards for systems they are assigned to develop or maintain and abide by all Department and Agency policies and procedures.
- Document and implement security processes whenever available.

RPMS developers shall not

- Write any code that adversely impacts RPMS, such as backdoor access, "Easter eggs," time bombs, or any other malicious code or make inappropriate comments within the code, manuals, or help frames.

- Grant any user or system administrator access to RPMS unless proper documentation is provided.
- Release any sensitive agency or patient information.

A.3 Privileged Users

Personnel who have significant access to processes and data in RPMS, such as, system security administrators, systems administrators, and database administrators, have added responsibilities to ensure the secure operation of RPMS.

Privileged RPMS users shall

- Verify that any user requesting access to any RPMS system has completed the appropriate access request forms.
- Ensure that government personnel and contractor personnel understand and comply with license requirements. End users, supervisors, and functional managers are ultimately responsible for this compliance.
- Advise the system owner on matters concerning information technology security.
- Assist the system owner in developing security plans, risk assessments, and supporting documentation for the certification and accreditation process.
- Ensure that any changes to RPMS that affect contingency and disaster recovery plans are conveyed to the person responsible for maintaining continuity of operations plans.
- Ensure that adequate physical and administrative safeguards are operational within their areas of responsibility and that access to information and data is restricted to authorized personnel on a need-to-know basis.
- Verify that users have received appropriate security training before allowing access to RPMS.
- Implement applicable security access procedures and mechanisms, incorporate appropriate levels of system auditing, and review audit logs.
- Document and investigate known or suspected security incidents or violations and report them to the ISSO, Chief Information Security Officer (CISO), and systems owner.
- Protect the supervisor, superuser, or system administrator passwords.
- Avoid instances where the same individual has responsibility for several functions (i.e., transaction entry and transaction approval).
- Watch for unscheduled, unusual, and unauthorized programs.
- Help train system users on the appropriate use and security of the system.

- Establish protective controls to ensure the accountability, integrity, confidentiality, and availability of the system.
- Replace passwords when a compromise is suspected. Delete user accounts as quickly as possible from the time that the user is no longer authorized system. Passwords forgotten by their owner should be replaced, not reissued.
- Terminate user accounts when a user transfers or has been terminated. If the user has authority to grant authorizations to others, review these other authorizations. Retrieve any devices used to gain access to the system or equipment. Cancel logon IDs and passwords and delete or reassign related active and backup files.
- Use a suspend program to prevent an unauthorized user from logging on with the current user's ID if the system is left on and unattended.
- Verify the identity of the user when resetting passwords. This can be done either in person or having the user answer a question that can be compared to one in the administrator’s database.
- Shall follow industry best standards for systems they are assigned to and abide by all Department and Agency policies and procedures.

Privileged RPMS users shall not

- Access any files, records, systems, etc., that are not explicitly needed to perform their duties
- Grant any user or system administrator access to RPMS unless proper documentation is provided.
- Release any sensitive agency or patient information.

Glossary

Case Manager

A user of the RPMS Immunization Module responsible for managing patients. This includes immunization tracking and recall, entering or editing patient data, selecting appropriate letters, scanning for delinquent needs, and more.

Case Manager, Active

Currently carrying a caseload; available for selection when editing a patient's Case Data.

Case Manager, Inactive

Listed for historical purposes; cannot be entered/selected when editing a patient's Case Data.

Contraindication

A symptom or condition that makes a particular procedure or treatment inadvisable.

Data Element

A field in a record (e.g., patient record).

Due Dates

Dates on which ImmServe, a forecasting algorithm, has forecast immunizations as due.

Due Letter

A letter generated and printed by the software that is sent to a patient containing information about immunizations that are due.

Export

A process by which you can send a report to a file or to another computer, site, or agency.

File Format

The layout and style in which data is formatted in a file for export or electronic transmittal.

Forecast

A projection of immunizations that are due and that date on which they should be administered.

Health Summary

A listing of patient information including demographic data, insurance, allergies, scheduled visits, in-hospital visits, outpatient/field visits, referred care, immunizations, health maintenance reminders, missed dental visits, Diabetes and Cancer summary information, mental health/social services data and a problem list.

ImmServe

Software that evaluates immunization histories and determines due dates.

Immunization Rate

The proportion of patients who received a specified vaccine or group of vaccines within a timeframe or by a certain age.

Immunization Register

Also known as Immunization Register; the subset of RPMS registered patients whose immunization administrations are actively being tracked/followed.

Key

A password that allows or restricts access to specific areas of functionality in the software.

Location Type

An identification of a location as an IHS facility or Other such as a private clinic or physician practice.

Lot Number

The number identifying a manufacturer's batch of a particular vaccine; important in the tracking of recipients of a specific batch with which a problem has been determined.

Official Immunization

The letter that presents all of a patient's Immunization information

Output Device

The equipment to which a file is sent; usually refers to a printer or to the computer monitor screen (Home).

Patient, Active

One who is being tracked and followed up on for immunization purposes because of age, vulnerability to disease, or both; generally those patients under a certain number of years of age (e.g., 7 or 8).

Patient, Inactive

One who is no longer being tracked or followed up on for immunization purposes; generally those patients beyond a certain number years of age (e.g., 7 or 8).

PCC Category

Patient Care Component category; that is, ambulatory, historical event, or inpatient.

Program Manager

The person chiefly responsible for the setup and operation of the RPMS Immunization Module at a given site.

Reaction

An adverse response to the administration of an immunization.

Record Letter

Generally sent to schools, parents, other clinics, etc.

Site Manager

The person responsible for operation of the IHS site; determines and assigns access levels to site users.

Site Parameters

Settings that can be made by the Site Manager to customize the software and data to a particular site.

Skin Test

A subcutaneous test to determine delayed hypersensitivity and thereby exposure to an antigen (e.g., PPD).

Statement

Vaccine administered and documents the Date of Publication as evidence of Informed Consent for the vaccination.

Translation Table

A table that gives standard alternate names, maximum doses, series types, and HL7 codes for all vaccines; it explains the translation of the old vaccine names and codes in the Old Immunization Table to the new HL7 codes and names.

Vaccine, Active

Currently available; may be entered/selected when entering new immunizations.

Vaccine, Inactive

Listed only for historical purposes; no longer available as a valid choice.

Vaccine Information Sheet (VIS)

A statement provided to the parent of a patient that identifies each vaccine.

Vaccine Table

A standard list of all IHS vaccines and their HL7 codes.

Acronym List

Acronym	Meaning
EHR	Electronic Health Record
HIPAA	Health Insurance Portability and Accountability Act
HHS	Department of Health and Human Services
ID	Identification
IHS	Indian Health Service
IT	Information Technology
OIT	Office of Information Technology
PC	Personal Computer
PHI	Protected Health Information
PHR	Personal Health Record
PII	Personally Identifiable Information
PPN	Patient Preferred Name
ROB	Rules of Behavior
RPMS	Resource and Patient Management System
QA	Quality Assurance
SAC	Standards and Conventions
SOP	Standard Operating Procedure
VPN	Virtual Private Network

Contact Information

If you have any questions or comments regarding this distribution, please contact the IHS IT Service Desk.

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