



# State of Nevada Immunization Information System

## *Data Entry & Patient Record Management Type 2 – Training Manual*

**<https://webiz.nv.gov>**

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# User Defaults

## Set Your Defaults for Ease of Data Entry:

The screenshot shows the 'User Defaults' configuration page in the Nevada WebIZ application. The left sidebar contains a menu with 'User Defaults' circled in red. Red arrows point from text boxes to specific settings: 'Page 7 in this manual' points to 'Immunization History Screen Preferences'; 'Page 9 in this manual' points to 'Administered By Defaults'; 'Always NO!' points to 'Auto-Populate Recommended Vaccines on Add Vaccines Screen'; 'Will show you in class both options for Yes and No - allowing for your personal preference. Refer to page 12 of the Common Features Training Manual.' points to 'Display Today's Recommendations'; 'Refer to page 4 of this manual.' points to the demographic dropdowns; and 'Leave Blank' points to the 'Immunization Administered By' field.

**NEVADA webIZ**

Patient Search

Home

Patients

Immunizations

Treatments

CRA Quick Add

Inventory

Campaigns

Billing

Settings

Change Password

Password Questions

**User Defaults**

Clinic Vaccine Defaults

User Vaccine Defaults

Administration

Version 14.8-26  
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**User Defaults**

Use the following options to specify your WebIZ application preferences. Click "Update" to save your changes or "Cancel" to return to the previous page.

**Edit**

**Immunization Screen**

☐ Auto-Populate Recommended Vaccines on Add Vaccines Screen

☒ Display Today's Recommendations

**Immunization History Screen Preferences**

Type of boxes: **DATE BOXES**

Number of boxes: 6

**Demographic Defaults**

Language: [Dropdown]

City: [Dropdown]

County: [Dropdown]

State: [Dropdown]

Country: [Dropdown]

Zip Code: [Text Box]

**Administered By Defaults**

Immunization Administered By: [Dropdown]

Treatment Administered By: [Dropdown]

**Annotations:**

- Always NO!
- Will show you in class both options for Yes and No - allowing for your personal preference. Refer to page 12 of the Common Features Training Manual.
- Refer to page 4 of this manual.
- Leave Blank

### Immunization Screen

- Auto-Populate Recommended Vaccines = **NO**
- Display Today's Recommendations = Yes or No, this is your personal preference

### Immunization History Screen Preferences (Refer to page 7 of this manual)

Recommended Settings: Type of Boxes = Date Boxes      Number of Boxes = 6

### Demographic Defaults

- Set per the location of the majority of your patients. Do not fill in Zip Code if in multi zip code city.

### Administered By

- Set the "Immunization Administered by" field to you or whomever in your office will be recorded as the 'shot giver' or leave blank if there are several in your office.

# Clinic Vaccine Defaults

## Adding Your Initial Vaccines and Each New Shipment:

PROVIDER: SMALL WORLD CLINIC, CLINIC: SML WRD CLINIC

Vaccine Defaults

Click "Update" to save the record or "Cancel" to return to the previous page.

Edit

Note: Changes to any of the search criteria will result in the screen being reset and then require the "Search" button to be pressed again.

Clinic: SML WRD CLINIC  
Status: (ALL) Vaccine: (ALL) Funding Source: (ALL) Search

Vaccine   Manufacturer   NDC   Brand	Lot	Funding Src	Exp Date	Dosage	Route	Delete?
DTAP-HEP B-IPV   SKB   58160-0811-41   PEDIARIX (0.5 ML SD SYR X 1 SYR)	123ABC	PRIVATE	12/31/2018	0.5ML	INTRAMUSCULAR	<input type="checkbox"/>
			MM/DD/YYYY			<input type="checkbox"/>
			MM/DD/YYYY			<input type="checkbox"/>
			MM/DD/YYYY			<input type="checkbox"/>
			MM/DD/YYYY			<input type="checkbox"/>
			MM/DD/YYYY			<input type="checkbox"/>
			MM/DD/YYYY			<input type="checkbox"/>
			MM/DD/YYYY			<input type="checkbox"/>
			MM/DD/YYYY			<input type="checkbox"/>
			MM/DD/YYYY			<input type="checkbox"/>

Click on Search ***first*** to view all current vaccines stored in your clinic's inventory. You can also refine that list by Status, Vaccine (type), and/or Funding Source (Private, VFC, 317, Other).

Next, click on the drop-down box for a list of every vaccine including: Type, Manufacturer, NDC and Brand Trade Name. Be careful when choosing the Brand Name that you pick the proper syringe and/or vial combinations.

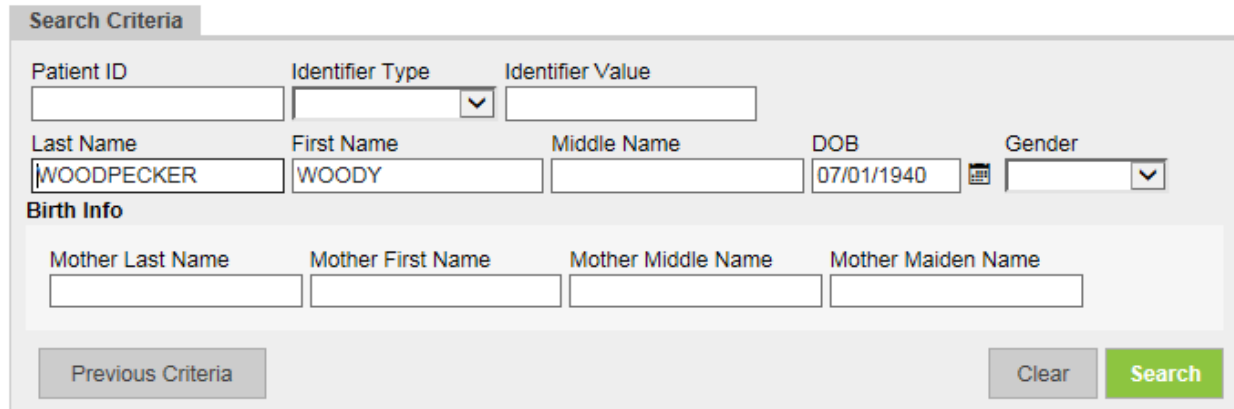
DTAP-HEP B-IPV		SKB		
DTAP-HEP B-IPV		SKB		58160-0811-01   PEDIARIX (0.5 ML X 1 VIAL)
DTAP-HEP B-IPV		SKB		58160-0811-11   PEDIARIX (0.5 ML X 10 VIALS)
DTAP-HEP B-IPV		SKB		58160-0811-41   PEDIARIX (0.5 ML X 1 SYR)

Once you have chosen the proper combinations above, allow the screen a moment to refresh. You will notice after the screen is refreshed, it automatically filled in the Dosage and Route fields based on your vaccine selection. Then fill in the Lot Number, Funding Source and Expiration Date Fields. Click Update to add this vaccine.

**Note:** Vaccines will automatically be removed from this screen the day after their expiration date. If you have dispensed all doses prior to the expiration date, you can delete it by clicking on the Delete check box. MAKE SURE all doses have been recorded in WebIZ prior to deleting!

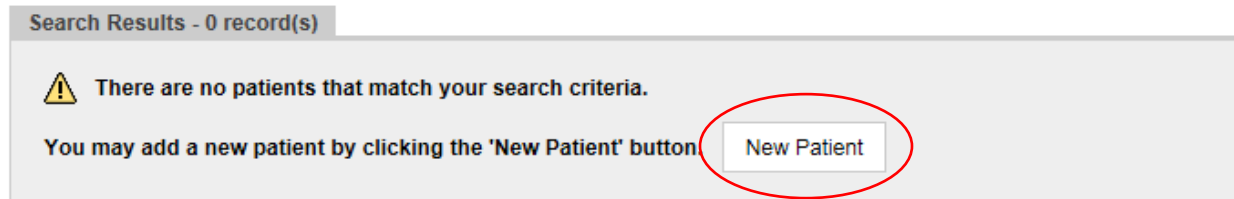
## Adding A New Patient

If after a thorough search you cannot find your patient (refer to Best Practice Patient Searching on pages 9-11 in the Common Features Training Manual), proceed with creating a new patient record by clicking on the New Patient button:



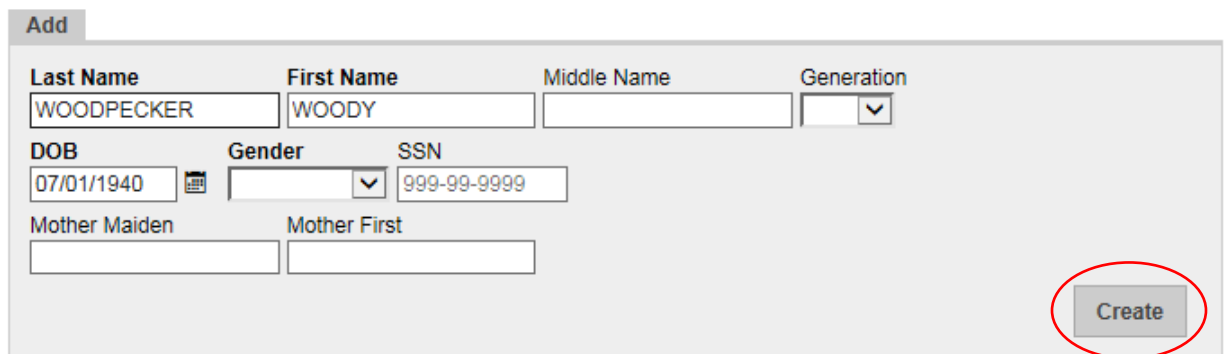
The 'Search Criteria' form contains the following fields and controls:

- Patient ID**: Text input field.
- Identifier Type**: Dropdown menu.
- Identifier Value**: Text input field.
- Last Name**: Text input field with 'WOODPECKER' entered.
- First Name**: Text input field with 'WOODY' entered.
- Middle Name**: Text input field.
- DOB**: Date input field with '07/01/1940' entered.
- Gender**: Dropdown menu.
- Birth Info** section with:
  - Mother Last Name**: Text input field.
  - Mother First Name**: Text input field.
  - Mother Middle Name**: Text input field.
  - Mother Maiden Name**: Text input field.
- Buttons**: 'Previous Criteria' (disabled), 'Clear' (disabled), and 'Search' (green).



The 'Search Results - 0 record(s)' section displays a warning icon and the message: "There are no patients that match your search criteria." Below this, it states: "You may add a new patient by clicking the 'New Patient' button". The 'New Patient' button is circled in red.

You will be taken to the Add screen to fill-in required **bolded** data fields:



The 'Add' form contains the following fields and controls:

- Last Name**: Text input field with 'WOODPECKER' entered.
- First Name**: Text input field with 'WOODY' entered.
- Middle Name**: Text input field.
- Generation**: Dropdown menu.
- DOB**: Date input field with '07/01/1940' entered.
- Gender**: Dropdown menu.
- SSN**: Text input field with '999-99-9999' entered.
- Mother Maiden**: Text input field.
- Mother First**: Text input field.
- Create**: Button circled in red.

**Required for all patients** = Last Name, First Name, DOB and Gender

**Required, if available, for children per NV State Law** = Mother's Full Name

**Optional** = Social Security Number (SSN); Entry allows for better record identification and is protected from view once saved in Nevada WebIZ (displays only as ###-##-####).

Select *Create*.

Once you select Create, the system will check the entire database to see if your newly created patient may be a possible duplicate of another patient already in the system. If any potential duplicates are found, Nevada WebIZ displays a list of those patients for your review, so you can verify for a 2<sup>nd</sup> time whether or not your patient is already in the system. Please review this list very closely to avoid creating duplicate patient records. If the database does not see any possible potential duplicates, the previous step will be skipped and you will be taken directly to the new patient's Demographics screen.

Here we see a verification list of patients with closely related names and dates of birth as the new patient. If your new patient does not match any shown in this list, then click on the Proceed with Create button.

**Patients New**

Click "Create" to create a new patient.

**Add**

Last Name: WOODPECKER First Name: WOODY Middle Name: Generation:   
 DOB: 02/17/1983 Gender: MALE SSN: 999-99-9999   
 Mother Maiden: Mother First:   
 Proceed with Create

**Possible Duplicates**

The following patients have been found with similar criteria. If any of the following record(s) are the patient you are trying to create, select the patient below.

ID	Name	Phone	Insurance	VFC	Gender	DOB
<input type="radio"/> 3118500	WOODPECKER, WOODY 1884 BIGHORN ST PAHRUMP, NV 89048			5	M	02/14/1983
<input type="radio"/> 3118503	WOODPECKER, WOODY			5	M	02/15/1983
<input type="radio"/> 3118504	WOODPECKER, WOODY 450 MAIN ST GARDNERVILLE, NV 89460			5	M	02/16/1983
<input type="radio"/> 3118502	WOODPECKER, WOODY 65498 MAGIC KINGDOM WAY LAS VEGAS, NV 89102			5	M	02/18/1983
<input type="radio"/> 3118501	WOODPECKER, WOODY 1234 MAIN ST PAHRUMP, NV 89060			5	M	02/19/1983

Demographics Local IDs Programs Allergy / Risks Notes Treatments   
 Events Immunizations Duplicates

Once you click the Proceed with Create button, you will be taken to the Demographics screen where the unique WebIZ Patient ID# was created and now you are able to complete the additional required fields.

Edit WOODPECKER, WOODY (3118505) DOB: 02/17/1983 AGE: 31Y 8M 10D

Update Cancel

Patient Info | Alias | Health Ins | Contact Info | Address | Race/Ethnicity | Recommender | Provider Information | Birth Info   
 Address History Insurance History Campaign Responder Default Clinic Contacts Set Defaults

**Patient Information**

Last Name: WOODPECKER First Name: WOODY Middle Name: Generation: Title/Credential:   
 Gender: MALE DOB: 02/17/1983 Birth Time: HH:MM AM/PM (HH:MM A/P)

# **Patient Demographics Screen**

When adding a new patient or updating the data on an existing patient, make sure all required **(bolded)** fields are completed.

**VFC Eligibility** - When a new patient record is created, their VFC Eligibility is automatically assigned a VFC status of (99) Unknown. If your office is enrolled in the Vaccines for Children (VFC) Program, you should make it your first priority to change the VFC Eligibility field to reflect the current eligibility status for your patient. Remember, once a patient is 19 years of age or older, they are no longer eligible for the program and their VFC Eligibility Status should be changed to (5) Not VFC Eligible.

## **VFC Eligibility Status Options:**

- (1) VFC Eligible: Medicaid Eligible or Enrolled
- (2) VFC Eligible: Uninsured
- (3) VFC Eligible: American Indian or Alaskan Native
- (4) VFC Eligible: Underinsured
- (5) Not VFC Eligible: If patient has health insurance which covers vaccines or is 19 years of age or older
- (6) Nevada Checkup: If patient is enrolled in this state-sponsored insurance program
- (99) Unknown: Use only if eligibility cannot be determined or if office is not VFC-enrolled

## **Additional mandatory (bolded) and suggested optional fields:**

- (Optional) The “History of Varicella Yes/No and Date” fields now have new importance! If a patient has had chickenpox, document it in the fields on the Demographics screen. A patient’s history of varicella illness is now printed on the Official Immunization Record under the “Varicella (Cpox)” section.
- (Optional) If a patient is known to have an Alias name or had a name change, please record previous name in the Alias section (both the Last Name and First Name fields). If an alias name is entered in the patient search screen, then WebIZ will retrieve the proper person.
- Complete and accurate addresses (required) and telephone numbers (optional) are important for future reporting and statistical purposes, and are valuable to both the Centers for Disease Control and Prevention (CDC) and the Nevada State Health Division in the event of a vaccine recall or public health emergency.

**Patient Demographics**

Click "Update" to save the record or "Cancel" to return to the previous page.

Official Immunization Record  
Administrative Record

Adopt Patient

Fills in Demographic Defaults referred to on page 2.

**Edit** CHIPMUNK, SIMON (3118797) DOB: 06/24/2011 AGE: 3Y 4M 4D

**Update** **Cancel**

Patient Info | Alias | Health Ins | Contact Info | Address | Race/Ethnicity | Recommender | Provider Information | Birth Info

Address History | Insurance History | Campaign Responder | Default Clinic | Contacts | **Set Defaults**

**Patient Information**

Last Name: CHIPMUNK First Name: SIMON Middle Name: Generation: Title/Credential:

Gender: MALE DOB: 06/24/2011 Birth Time: 09:11 AM AM/PM (HH:MM A/P)

**VFC Eligibility**  
(2) VFC ELIGIBLE: UNINSURED

SSN: 999-99-9999

Language: English Speaking? ☐ Interpreter Needed? ☐

**History of Varicella**  
Date of Varicella: 09/01/2011

**NPRAA Notice Status**  
Date Given: MM/DD/YYYY Last Notice Given: No Notice Given

**Alias**

Last Name: First Name: Middle Name: Generation:

## Adding Local ID, Notes, Allergy/Risk

### How to Add a Local Identifier to a Patient Record:

- Select "Local IDs" from the Patient Menu.
- Select "Add Local Identifier."
- Fill in the required information and select "Create."

**Note:** Local IDs are clinic specific. Only users assigned to your clinic will be able to search for the patient using your Local ID (Examples of: EMR or Billing Record Number).

**NEVADA webIZ**

Patient Search

Home  
Patients  
Search  
Demographics  
**Local IDs**  
Programs  
Notes  
Allergies/Risks  
Events  
Duplicates  
Immunizations

PROVIDER: SMALL WORLD CLINIC, CLINIC: SML WRLD CLINIC

**CHIPMUNK, SIMON**  
ID: 3118797 DOB: 06/24/2011 AGE: 3Y 4M 4D GENDER: M

**Patient Local Identifier**

Click "Create"/"Update" to save the record or "Cancel" to return to the previous page.

**Add** CHIPMUNK, SIMON (3118797) DOB: 06/24/2011 AGE: 3Y 4M 4D

**Provider**  
SMALL WORLD CLINIC

**Clinic**  
SML WRLD CLINIC

**Local Identifier**  
123456

**Create** **Cancel**



## How to Add a Note to a Patient Record:

- Select “Notes” from the Patient Menu.
- Select “Add Note.”
- Fill in the Type of note from the drop-down list. Some notes can be printed on the Official Immunization Record if you select that option. Type your text in the Note field and select “Create.” Remember that medically sensitive information should not be entered as a Note!

NEVADA webIZ

Patient Search

Home

Patients

Search

Demographics

Local IDs

Programs

**Notes**

Allergies/Risks

Events

Duplicates

Immunizations

Treatments

PROVIDER: SMALL WORLD CLINIC, CLINIC: SML WRLD CLINIC

CHIPMUNK, SIMON

ID: 3118797 DOB: 06/24/2011 AGE: 3Y 4M 4D GENDER: M

Patient Notes

Click "Create"/"Update" to save the record or "Cancel" to return to the previous page.

Add CHIPMUNK, SIMON (3118797) DOB: 06/24/2011 AGE: 3Y 4M 4D

Create Cancel

Date 10/28/2014 Type IZ

Author FILIPPELLI, KEVIN (INSTRUCTOR/TEACHER) Provider SMALL WORLD CLINIC

Note PATIENT IS AFRAID OF NEEDLES. MAY NEED TO RECLINE WHEN ADMINISTERING IMMUNIZATIONS

Create Cancel

## How to Add an Allergy/Risk to a Patient Record:

- Select “Allergies/Risk” from the Patient Menu.
- Select “Add Allergy/Risks.”
- Select the allergy or risk type from the Allergy/Risk drop-down field. Write any supporting documentation in the Comments field. Then select “Create.” Note that an Expiration Date may be appropriate for your selected allergy or risk (Examples: chemo treatments or pregnancy).

**Note:** Any vaccine contraindications will be listed for the Allergy/Risk option that you selected.

Patient Allergy / Risks

Click "Create"/"Update" to save the record or "Cancel" to return to the previous page.

Add CHIPMUNK, SIMON (3118797) DOB: 06/24/2011 AGE: 3Y 4M 4D

Create Cancel

Author FILIPPELLI, KEVIN (INSTRUCTOR/TEACHER) Effective Date 10/28/2014 Expiration Date MM/DD/YYYY

Provider SMALL WORLD CLINIC

Allergy / Risks EGG (SEVERE ALLERGY)

Comments WRITE COMMENTS HERE...

Associated Vaccine(s)

Influenza Inj MDCK P, Influenza Quad Inj P, Influenza Quad W/Pre, Influenza w/preserv., Influenza, High Dose, Influenza, Intraderm, Influenza, P-Free, Influenza-LAIV Quad

## Some Helpful Data Entry Tips & Tricks:

Press **Enter** on your keyboard to trigger **“The Default”**. Default function is bolded.

**Calendar Icons** - Clicking on the calendar icon opens up a calendar to select a date. Double-click date fields for today's date.


**Save = Update, Add, Create**

Saved records are date/time stamped in green at the top of a screen.

## Recording Historical Vaccinations:

Clicking on the Add History button takes you to the historical entry screen. **Note:** This process is only used to enter historical data from past immunization paper records or out of state immunization records!

The screenshot shows the Nevada WebIZ interface. On the left is a blue sidebar with a search bar and a menu containing: Home, Patients, Immunizations (circled in red), Treatments, CRA Quick Add, Inventory, and Hepatitis B. The main content area has a header with the provider 'SMALL WORLD CLINIC' and patient information for 'CHIPMUNK, SIMON' (ID: 3118797, DOB: 06/24/2011, AGE: 3Y 4M 4D, GENDER: M). Below the header is a section titled 'Immunizations Home' with instructions and links for 'Official Immunization Record', 'Administrative Record', and 'Edit Vaccine Defaults'. At the bottom, there is a 'View' section for the patient and three buttons: 'Add Vaccines', 'Administer Vaccines', and 'Add History' (circled in red).

This historical entry screen represents the six date boxes that you defined on the User Defaults screen on page 3. This symbol appears next to each historical entry. 

Immunization History

Click "Add" to save the new immunization(s) or

View CHIPMUNK, SIMON (3118797) DOB: 06/24/2011

Depending on the age of patient, this screen will either default to the list of **Child Vaccines** for a child or **All Vaccines** for an adult.

Show: CHILD VACCINES

History of Varicella? NO Date of Varicella MM/DD/YYYY Past Vaccination Clinic PARENTAL RECORD ☐ Take ownership of patient

Vaccine	Dates of Past Immunizations (order not important)						Vaccine
CPOX (Varicella)	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	CPOX (Varicella)
DT (Ped)	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	DT (Ped)
DTaP	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	DTaP
DTaP, 5 pertusis ant	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	DTaP, 5 pertusis ant
DTaP-Hep B-IPV	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	DTaP-Hep B-IPV
DTaP-Hib	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	DTaP-Hib
DTaP-IPV (Kinrix)	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	DTaP-IPV (Kinrix)

Add Cancel

1. Find your vaccine in the far right or left columns and enter the date administered in the corresponding date box. You can enter up to six dates in a series for the same vaccine. Do not worry about entering them in any order. WebIZ will place them in chronological order when they are recorded on the immunization screen.
2. WebIZ always defaults to the Child Vaccine list (Child and Adolescent) per ACIP Schedule, so if you are working with an adult or overseas record, change the drop down box to ALL vaccines to see the list of all vaccines.
3. Click Add to add all these historical vaccines to your patient's record.

## Recording Vaccinations:

Recording vaccinations is a two step process. The first step is to Add Vaccines and the second step is Administer Vaccines.

NEVADA webIZ

Patient Search

Home

Patients

**Immunizations**

Treatments

CRA Quick Add

Inventory

Hepatitis B

Campaigns

PROVIDER: SMALL WORLD CLINIC; CLINIC: SML WRLD CLINIC

CHIPMUNK, SIMON

ID: 3118797 DOB: 06/24/2011 AGE: 3Y 4M 4D GENDER: M

Immunizations Home

Use this Screen to view a Patient's Immunization History and to add new Immunizations.

Official Immunization Record

Administrative Record

Edit Vaccine Defaults

View CHIPMUNK, SIMON (3118797) DOB: 06/24/2011 AGE: 3Y 4M 4D

Add Vaccines Administer Vaccines Add History

DOB: 06/24/2011 Age: 3Y 4M 4D Reminder Date: History of Varicella? NO Date of Varicella: MM/DD/YYYY

Always make sure the Auto-Populate box is **UNCHECKED**

Recommend ☐ Auto-Populate Add Vaccines Screen

## How to add a vaccine:

Add CHIPMUNK, SIMON (3118797) DOB: 06/24/2011 AGE: 3Y 4M 4D

Create and Administer Cancel

**Allergy / Risks**

Egg (severe allergy)

**Clinic** SML WRLD CLINIC **Vacc Date** 10/28/2014 3Y 4M 4D

☐ Do not set this clinic as the 'default clinic' for this patient

Reminder Date MM/DD/YYYY

Display All Vaccines Clear Vaccines

**Vaccine** **Vis/Publication**

Create and Administer Cancel

Check to make sure that this is the proper clinic – if not go back to the Main Menu Home Page and change to the proper clinic location.

1. The **Vacc Date** field is the date that the actual vaccination was given. Remember to change and verify that this is the correct date. Do not accept the default (today's date) if you are recording vaccinations given on a previous day.
2. If you are **not** the patient's primary physician, then make sure to click on the check box **Do not set this clinic as the default clinic for this patient**. i.e., hospitals, urgent care, non-profit immunization fairs/clinics – always make sure that your staff checks this box! By checking this box, WebIZ will not assign this patient to your Patient Roster however, the vaccinations you administered will be counted in *your* dosage reports.
3. **Administered By** is the name of the actual person at your office who gave the vaccination.
4. Click on the **Vaccine** drop down box for a list of all vaccines appropriate for this person based on their age and the ACIP schedule.

The vaccines listed on this screen are filtered by age. If a vaccination is administered outside of the licensed age range, or "off label," it will not appear under Vaccine. Click on "Display All Vaccines" to allow all available vaccines to appear in the Vaccine dropdown field. **NOTE:** A vaccination given outside of the recommended age range may still be noted as "invalid" by Nevada WebIZ.

- You can enter up to six vaccines on this page per patient, as long as the vaccines were given on the same date.
- When finished, click Create and Administer.
- If you made a mistake, you can click on the Clear Vaccines button and start over.

## VIS Documentation

- The method for documenting vaccine information statements (VIS) underwent a major change in v14.8. This change was made to support provider responsibility to comply with federal law (National Vaccine Childhood Injury Act; NCVIA – [42 U.S.C. § 300aa-26](#)) and Centers for Disease Control and Prevention (CDC) recommendations. Per the CDC, healthcare providers should make a notation in each patient's record- requiring providers to actively document the VIS given, rather than allowing the system to automatically record what was given supports this concept.
  - In the previous version, Nevada WebIZ recorded by default the currently active VIS associated with the vaccine. The user could edit the VIS if corrections were necessary.
  - In the current version of Nevada WebIZ,
    - New buttons have been added to the “Add” screen next to each vaccine indicated (per line) for use in selecting the VIS given to the patient.
    - Users must select a VIS before moving forward to the “Administer” screen. When the checkbox next to the “Select VIS” button is green, ✓ it means a VIS has been selected. When the checkbox next to the “Select VIS” button is red, ⚠ it means a VIS has not yet been selected.

PROVIDER: SMALL WORLD CLINIC, CLINIC:

CHIPMUNK, SIMON

ID: 3118797 DOB: 06/24/2011 AGE:

Immunizations

Click "Create" to add the immunization, "Administer Vaccine screen, or "Cancel" to Please do not rely solely on Registry record product package inserts and the CDC's list

Vaccine Package Inserts

Add CHIPMUNK, SIMON (3118797) DO

Allergy / Risks

Egg (severe allergy)

Clinic SML WRLD CLINIC Vacc Date 02/02/2015 3Y 7M 9D

Do not set this clinic as the 'default clinic' for this patient

Reminder Date MM/DD/YYYY Patient is VFC eligible

Display All Vaccines Clear Vaccines

Vaccine

DTAP Select VIS ⚠

DTAP Select VIS ✓

Create and Administer Cancel

Version 14.8-26  
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Envision Technology Partners Inc.

## How to Administer a Vaccine:

This screen is where you log the information about the vaccine that you administered to your patient.

1. **Administered By** is the name of the actual person at your office who gave the vaccination.
2. Click on the **Mfg/Lot/Exp/Funding/NDC/Brand** link for a list of vaccine types associated with your clinic. This is where the data you entered under Clinic Vaccine Defaults on page 4 will be shown. The Dosage and Route fields will be auto populated based on the information you entered under Clinic Vaccine Defaults. If your manufacturer and lot number information is not available in the drop-down, that means the vaccine was not added in Clinic Vaccine Defaults (page 4).

**Multi-colored Funding Sources:** To aid in differentiating between lot numbers of various funding sources, each funding source now displays as a different color on the Administer Vaccinations screen. This will be helpful, as many providers may have vaccines from the same lot, but two (2) or more different funding sources. The colors are as follows: Private = Black, VFC = Red, 317 = Blue, ARRA = Green, Other = Orange. **Note:** the funding sources listed are not necessarily used by every provider.

3. Select the **Body Site** location where the vaccine was given. A description of each code is available from the Standard Forms section on the Reports menu.
  - If a patient refuses a vaccine, you can enter the refused reason.
  - Click Update to enter this vaccine on the patient's record.





**Note:** If you do not complete the necessary required information on this screen, the vaccination will show on the immunization screen with the red syringe meaning it has not been administered. In addition, incomplete vaccine entries **will not print on the Official Immunization Record** and may lead to over or under immunization. Nevada State Law also requires entry of certain vaccine details, such as manufacturer and lot number. Please make sure that you do not have any red syringes on your patient records!

## Data Management:

### Updating and Editing an Administered Vaccine:


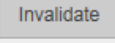


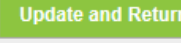

Everyone within a clinic location has the ability to update and/or edit a previously administered vaccine that was recorded by anyone else within your clinic. Contact the Help Desk to correct any errors you find from other providers/clinics.

To update or edit any vaccine, click on the Update button next to the specific vaccine on the Immunization Screen.

Vaccine	Dose	Date	Age	Clinic	
DTaP	1	10/28/2014	3Y 4M 4D	12345	 
MMR	1	10/28/2014	3Y 4M 4D	12345	 

You will be taken to the Vaccine Details screen where you can update or edit existing information.

Edit CHIPMUNK, SIMON (3118797) DOB: 06/24/2011 AGE: 3Y 4M 4D

The record has been saved successfully.

**Allergy / Risks**

Egg (severe allergy)

**Clinic**  
SML WRLD CLINIC

**Administered By**  
TEST-A, USER-A (WEBIZ MANAGER)

**Vaccine**  
DTAP

**Manufacturer**  
SANOFI PASTEUR (FORMERLY AVENTIS PASTEUR)

**Lot/Serial**  
321CBA

**Funding Src**  
VFC

**Expiration Date**  
12/31/2016

**NDC #**  
49281-0298-10

**Vaccination Date**  
10/28/2014

**Age**  
3Y 4M 4D

**Vaccination Time**  
HH:MM AM/PM (HH:MM A/P)

**VFC Eligible**  
(1) VFC ELIGIBLE: MEDICAID ELIGIBLE OR ENROLLED

**Dosage**  
0.5ML

**Body Site**  
LD

**Route**  
INTRAMUSCULAR

**Health Insurance**

**Insurance ID**

**Date Last Verified**  
MM/DD/YYYY

Group	Dose Number
DTaP/Td/Tdap	1

We will discuss in the training class which fields can and cannot be edited.


Once you make the necessary corrections, click the Update button, or if you are finished on this screen, click Update and Return to go back to the main immunization screen.

## Invalidate a Vaccine:

Making a vaccine invalid is completed on the same previous screen by clicking on the Invalidate button.

### When would you want to mark a dose invalid?

- 1.
- 2.

-  Remember that when you mark a vaccine invalid, this icon appears on the Immunization Screen as well as being printed on the Official Immunization Record.

## Recording an Adverse Vaccine Reaction to a Patient's Record:


Recording an adverse reaction to a specific vaccine is done on the same Vaccine Details screen where we can update / edit / or make invalid. Scrolling down on that screen allows you to enter up to three different reactions for a specific vaccine.

**Adverse Reaction 1**

☐ Adverse Reaction? (Note: Reaction Date, Reaction, Severity, and Clinic must all be specified)

**Reaction Date** **Date Reported To VAERS**  
MM/DD/YYYY MM/DD/YYYY

**Reaction** **Severity** **Consequence**  
[Dropdown] [Dropdown] [Dropdown]


**Clinic** **Recorded By**  
[Dropdown] [Text Field] 

Note: If this patient's adverse event is also an Allergy / Risk to future vaccinations, please record the appropriate entry in the following field to create an Allergy / Risk entry for the patient.

**Allergy / Risks**  
[Dropdown]

**Comments**  
[Text Area]

Complete the required information (bolded fields), then click Update at the top or bottom of this full screen. You can also print out the completed VAERS Form from this page as well and fax to CDC.

-  Remember that when you mark a vaccine as having an adverse reaction, this icon appears on the Immunization Screen.



## Programs:

When a clinic administers a vaccine\* to a patient in WebIZ or creates a new patient record, the patient is automatically placed on that clinic's patient roster and the clinic is listed as that patient's default clinic. To view the default clinic for a particular patient – click Default Clinic button on the Demographic Screen.

(\*unless you checked the "Do not set this clinic as the patient's default" when adding a vaccine)

PROVIDER: SMALL WORLD CLINIC, CLINIC: SML WRLD CLINIC

**CHIPMUNK, SIMON**  
ID: 3118797 DOB: 06/24/2011 AGE: 3Y 4M 4D GENDER: M

**Patient Demographics**

Click "Update" to save the record or "Cancel" to return to the previous page.

Official Immunization Record  
Administrative Record  
Adopt Patient

**Edit** CHIPMUNK, SIMON (3118797) DOB: 06/24/2011 AGE: 3Y 4M 4D

Update Cancel

Patient Info | Alias | Health Ins | Contact Info | Address | Race/Ethnicity | **Recommender** | Provider Information | Birth Info

Address History Insurance History Campaign Responder **Default Clinic** Contacts Set Defaults

**Patient Information**

Last Name	First Name	Middle Name	Generation	Title/Credential
CHIPMUNK	SIMON			

To close a patient and remove them from your patient roster, click on the Programs link on the Main Menu.

PROVIDER: SMALL WORLD CLINIC, CLINIC: SML WRLD CLINIC

**CHIPMUNK, SIMON**  
ID: 3118797 DOB: 06/24/2011 AGE: 3Y 4M 4D GENDER: M

**Patient Programs**

Click "View" to see the details of an existing record or "Add Program" to create a new record. Add Program

**View** CHIPMUNK, SIMON (3118797) DOB: 06/24/2011 AGE: 3Y 4M 4D

Program	Open Date	Close Date	Close Reason
Immunization	10/28/2014		

When would you want to close a patient out of the immunization program and remove them from your patient roster?

1. MOGE (Moved or Gone Elsewhere)
2. One Time Visit
- 3.
- 4.

Click on the View button to enter the Close Reason and Date. Additional comments can be added at your discretion as well. Click Update to complete the process.

Edit CHIPMUNK, SIMON (3118797) DOB: 06/24/2011 AGE: 3Y 4M 4D

Update Cancel

Program Open Date Close Date Close Reason

IMMUNIZATION 10/28/2014 MM/DD/YYYY

Comments

Delete Update Cancel

**Note:** Viewing and printing your Patient Roster in advance from the Reports section will assist you in determining which patients you need to close.

## **Reports:**

### **Patient**

- Official Immunization Record
- IZ History / Risk / Recommendations (Recommender Tool)

### **Forms / Informational Documents**

- ACIP Schedules
- VIS – Vaccine Information Statements
- Product Listing

### **Patient Management**

- Patient Reminder / Recall
- Patient Roster

### **Coverage Statistics**

- Dosage Report

### **Data Quality User**

- Patients With Possible Duplicate Vaccinations
- Possible Patient Duplicates
- User Vaccination Details
- Vaccines Added But Not Administered (aka Red Syringe Report)

### **Standard Forms**

- Body Site Code Legend
- CDC Manufacturer Codes
- Enrollment Form (New Provider Location / Clinic)
- Registry Law: How to comply with the new law (English & Spanish)
- Registry Law: Disclosure Poster (English & Spanish)
- Registry Law: Participation Form [Opt In or Out] (English & Spanish)
- User Confidentiality Agreement (New users to get username/password)

**Nevada WebIZ offers an Advanced Level Reports and Data Management class. Please check for the next class in your area. This class will allow your practice to maximize its use of Nevada WebIZ and allow VFC providers to better track their immunization rates.**

# Nevada WebIZ Quick Start Guide

## Type 2 Provider Data Entry

### STEP 1

- To access WebIZ type in the following URL: <https://webiz.nv.gov>
- Login to WebIZ using your unique Username and Password. First time users automatically have to establish a password unique to them and answer password security questions.
- Home Screen appears – **Note:** News etc. Your assigned provider will be listed at the top left of your screen. Remember if you document immunizations at one or more clinic, select the clinic for which you are entering the data.

### STEP 2

#### IMMUNIZATION - Inventory Entry

Prior to documenting immunizations for your patients you must enter your vaccine lot #'s in the system.

- To begin, go to the left hand side of your screen and select the +(Plus symbol) next to Settings.
- Select Clinic Vaccine Defaults.
- Select the vaccine and manufacturer of the vaccine.
  - The dosage and route are automatically filled in based on the vaccine selected.
  - You must fill in the **LOT #, FUNDING SOURCE, and EXPIRATION DATE.**
  - Select UPDATE

### STEP 3

**PATIENT** - Select the Plus + sign next to patient.

- Select Search
- Type in a combination of First Name, Last Name and Date of Birth (Note: Must fill in at least two fields; may also search with only Patient ID# if known).
- Didn't find your patient? Try again with a different combination. If you still don't find your patient: Select: New Patient
  - Fill in Date of Birth and Gender.
  - Select *Create!* When you select Create, the system will either show you potential matches or take you to the Demographics screen.

## Type 2 Provider Data Entry – con't

### STEP 4

**PATIENT DEMOGRAPHICS Screen** is the default screen that appears when you select *Create from the Add Patient screen*.

Make sure the bolded **FIELDS** are filled in. The required (**bolded**) fields are: **Last Name, First Name, DOB, Gender, VFC Eligibility and Address**. To save time under *User Defaults* you can preselect city, county, state and country. You can also copy from the mailing address down to the physical address and in reverse if the information is the same. Don't forget to select **UPDATE** to save your work.

### STEP 5

**IMMUNIZATION – Administering To Patient.** Select this feature to record immunizations for your patient.

**At the IMMUNIZATION Screen:** Select **Add Vaccines**.

- Ensure the Vacc date is correct (Vacc Date = date the vaccine was given)
- Select the administered vaccine from the drop down box.
- Select **Create and Administer**
  - This opens the Administer screen which lists the details of the corresponding vaccine lot #'s you added in the Settings screen. Choose the proper Lot # that was given to the patient.
  - Fill in the site (i.e. where on the body the shot was given)
  - Fill in the Administered by field with the shot giver (**defaults for this fields may be set in the User Default screen**).
- Select **UPDATE**.

If you document a refusal on the Vaccination screen, a **NOTE** is automatically created and will be documented on the Official Immunization Record.

### ADDITIONAL FEATURES

- **EVENTS** - Documents specific occurrences for your patient.
- **PROGRAMS**: This is an automatic feature that is filled in once you document your first immunization. However, when you want to disassociate the patient from your clinic, you would close the Program. Select a close date and reason.
- **NOTES**: This feature is used to document anything specific that you want to note regarding a patient and their immunizations. Be careful to guard the privacy of your patient.
- **ALLERGIES & RISKS**: Select this feature if you want to note an allergy/risk for your patient. When selecting an allergy, the system will generate a list of Immunizations that ***SHOULD NOT*** be given to your patient.

## Type 2 Provider Data Entry – con't

### ADD HISTORY

- Select Add History when you want to document shots given prior to your clinic utilizing WebIZ or the patient's immunization history from other providers.
- After entering the information, select Add to save the information you have recorded. The default for historical information is "Parental Record."
- When you return to the Immunization screen you will see the historical information recorded with a clinic code of "PR."

### Immunization Record: Where do you find it?

The immunization record can be accessed in several different ways.

1. After searching for your patient, you are at the Patient Search Results screen. At the top and bottom of this screen is a hyperlink titled "Official Immunization Record."
2. At the Patient Search Results screen, select the patient, then select Immunizations. On the top and bottom of the Immunizations screen is a hyperlink titled "Official Immunization Record."
3. Select Reports. The 1st report under Patient is the "Official Immunization Record". Please note that when selecting the immunization record from this area, the system will generate a record for the last patient record you worked with. If you have not yet worked with a patient record during your login session, the system will default to the Search screen where you may complete steps one or two.