



Managing Patient Status

Inactivating patients at the clinic and/or in the jurisdiction

Version 1_3.11.20



You can inactivate a patient from your clinic in the following ways:

- Mark the patient as deceased
- Mark the patient inactive at your clinic
- Move the patient to another clinic you are affiliated with
- Move the patient out of the jurisdiction (state of Connecticut)

Things You Should Know

In CT WiZ, patients are affiliated to one medical home clinic.

If your patient moves to another clinic within CT or leaves the state, he/she should no longer be affiliated with your clinic.

- When a clinic ‘administers a shot’, that clinic automatically takes ownership of that patient in CT WIZ if they are a medical home (this won’t happen with SBHC, Health Dept, etc).
- When a **patient transfers to another clinic**, the clinic must manually inactivate the patient in CT WiZ at the clinic (if the other clinic hasn’t already taken ownership by administering a shot).
 - You cannot move a patient to another clinic or state, but you can add a Comment with the new clinic’s contact info, if known.
- The only way to inactivate a patient at jurisdiction (when they **move out of state**) is manually in CT WiZ.

Things You Should Know

- As more clinics come online and ‘administer shots’ and take ownership of patients that transfer to them, some patient status management will happen automatically.
- However, online clinics still need to **review their roster** and **manage patient status** (inactivate patients who are not theirs) to prevent inaccurate coverage assessments.
- By having an accurate roster, they can run cleaner Reminder/Recall Reports to quickly identify children in their clinic who are due/overdue.

Things You Should Know

- There are two methods to change the patient status from your clinic. (patient leaves your clinic)
 1. Individual patient level
 2. Generate Inactive Patient Report
- There is only one way to change patient status from the jurisdiction. (patient moves out of state)
 - Individual patient level



Change patient status from your clinic

At the individual patient level



Patient Search [Learn More](#)

🔗 Links ▾

Search Criteria

| | | | | |
|--|----------------------|----------------------|----------------------|--|
| Patient ID | Identifier Type | Identifier Value | | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | | |
| Last Name | First Name | Middle Name | DOB | Gender |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| BU | BU | | MM/DD/YYYY | |
| <input type="button" value="Previous Criteria"/> | | | | <input type="button" value="Clear"/> <input type="button" value="Search"/> |

Previous criteria pulls up the most recent search

Enter your Search Criteria:

- First 2 letters of first and last name (Bugs Bunny = Bu & Bu)
- Patient ID
- Patient date of birth
- Other identifier (see Identifier Type drop down)

Then click Search to find any matching patients

Home

Contacts

Notes

Precautions/
Contraindications

Getting to the Programs Screen

Patient Search [Learn More](#)

Links ▾

Search Criteria

| | | | | |
|--|------------------------------------|--------------------------------------|---|---------------------------------------|
| Patient ID | Identifier Type | Identifier Value | | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | | |
| Last Name | First Name | Middle Name | DOB | Gender |
| <input type="text" value="BUNNY"/> | <input type="text" value="BETTY"/> | <input type="text"/> | <input type="text" value="MM/DD/YYYY"/> | <input type="text"/> |
| <input type="button" value="Previous Criteria"/> | | <input type="button" value="Clear"/> | | <input type="button" value="Search"/> |

Search Results - 1 record(s)

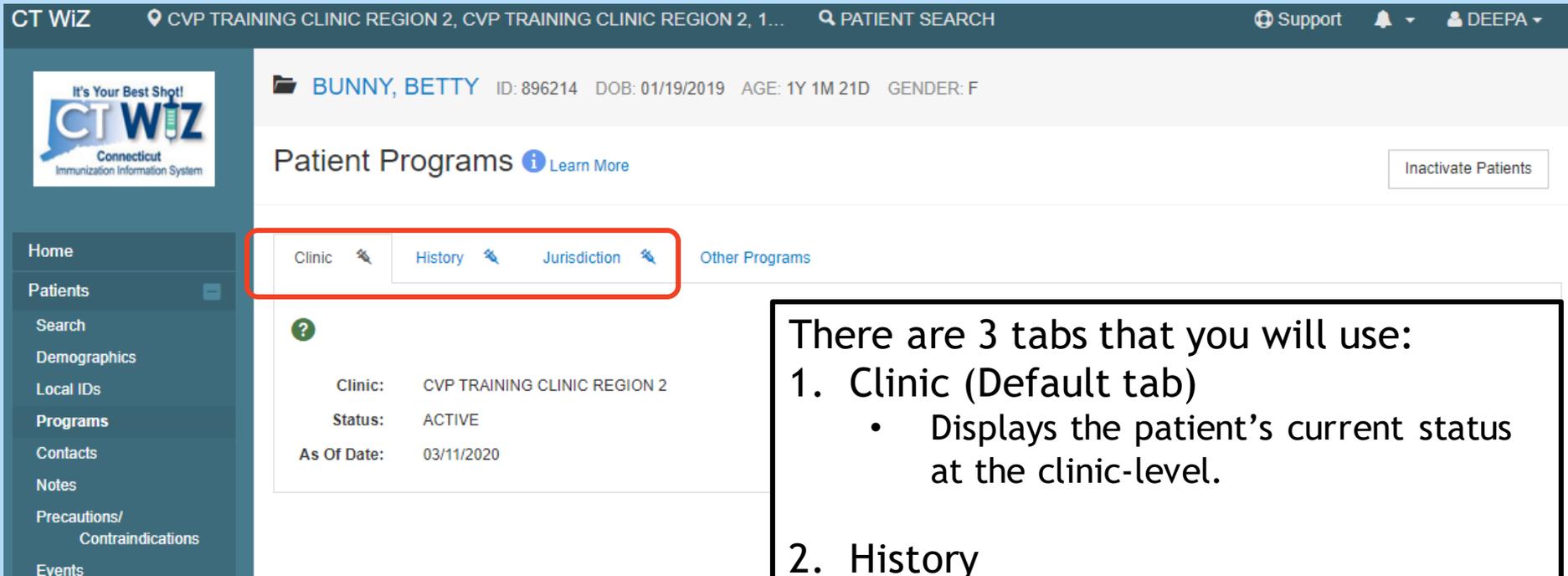
| ID | Name | Gender | DOB | Action |
|--------|---|--------|------------|---|
| 896214 | BUNNY, BETTY 410 CAPITOL AVE HARTFORD, CT 06134 | F | 01/19/2019 | <input type="button" value="Demographics"/> |

You may add a new patient by clicking the 'New Patient' button.

- Demographics
- Immunizations
- Contacts
- Duplicates
- Education
- Events
- Exemptions
- Local IDs
- Notes
- Precautions / Contraindications
- Programs**

Find the correct patient in the search results

Click Programs from the drop-down menu



CT WIZ CVP TRAINING CLINIC REGION 2, CVP TRAINING CLINIC REGION 2, 1... PATIENT SEARCH Support DEEPA

BUNNY, BETTY ID: 896214 DOB: 01/19/2019 AGE: 1Y 1M 21D GENDER: F

Patient Programs [Learn More](#) [Inactivate Patients](#)

Clinic History Jurisdiction Other Programs

?

| | |
|-------------|------------------------------|
| Clinic: | CVP TRAINING CLINIC REGION 2 |
| Status: | ACTIVE |
| As Of Date: | 03/11/2020 |

There are 3 tabs that you will use:

1. Clinic (Default tab)

- Displays the patient's current status at the clinic-level.

2. History

- Displays history of the patient's status at both clinics and jurisdiction

3. Jurisdiction

- Displays the patient's current status at the jurisdiction-level (state-level)

Changing Patient Status - Clinic Level

BUNNY, BETTY ID: 896214 DOB: 01/19/2019 AGE: 1Y 1M 21D GENDER: F

Patient Programs [Learn More](#)

Inactivate Patients

Clinic [History](#) [Jurisdiction](#) [Other Programs](#)



Clinic: CVP TRAINING CLINIC REGION 2

Status: ACTIVE

As Of Date: 03/11/2020

Select Action

Patient Deceased
Mark Patient Inactive at this Clinic
Change Clinic

You can mark the patient:

1. Deceased
2. Inactive at the clinic
3. Change the Clinic*

*You can only change the clinic if you are affiliated with both the old and new clinics

Marking a Patient Deceased

1. Enter the **date of death**
2. Enter **Comments**, if necessary
3. Click **Update** to save

Patient Deceased

Date of Death *

MM/DD/YYYY  1

Comments

2

3

Inactive at clinic - 1

ING CLINIC REGION 2, CVP TRAINING CLINIC REGION 2, ... PATIENT SEARCH

BU

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Clinic

?

As O

Inactive At Clinic

Effective Date: *
03/11/2020 1

Inactive Reason: *
NO LONGER A PATIENT 2

Notification Method: *
IN PERSON
PHONE
EMAIL
FAX 3

Reason: *

Comment:

Cancel Update

1. Enter the **effective date**
2. **Inactive Reason** is auto-filled
3. Select the **way you were notified** from the drop-down.

Inactive at clinic - 2 Con't

MP TRAINING CLINIC REGION 2, CVP TRAININ... PATIENT SEARCH

Inactive At Clinic

Effective Date: *
03/11/2020

Inactive Reason: *
NO LONGER A PATIENT

Notification Method: *
PHONE

Notification Date: *
03/11/2020

Reason: *
MOVED TO NEW CLINIC
MOVED OUT OF AREA
MOVED TO NEW CLINIC
OTHER

Cancel Update

4. Enter the date you were notified
5. Select 'Moved out of area' or 'Moved to new clinic' from the drop down for reason

Inactive at clinic - 3 Con't

TRAINING CLINIC REGION 2, CVP TRAININ... PATIENT SEARCH

Inactive At Clinic

Effective Date: *
03/11/2020

Inactive Reason: *
NO LONGER A PATIENT

Notification Method: *
PHONE

Notification Date: *
03/11/2020

Reason: *
MOVED TO NEW CLINIC

Comment:
MOVED TO DPH PEDIATRICS IN HARTFORD

Cancel Update

6. Enter information on where the child is going, if known, in the **Comments**

7. Click **Update** to save

Review Patient Status - Clinic Level

 **BUNNY, BETTY** ID: 896214 DOB: 01/19/2019 AGE: 1Y 1M 21D GENDER: F

Patient Programs [Learn More](#)

Inactivate Patients

Clinic  History  Jurisdiction  Other Programs



Clinic: CVP TRAINING CLINIC REGION 2

Reason: NO LONGER A PATIENT - MOVED TO NEW CLINIC

Status: INACTIVE

Notification Method: PHONE

As Of Date: 03/11/2020

Notification Date: 03/11/2020

Select Action 

If you did this in error,
Click on **Mark patient Active** at
this Clinic from the dropdown

Now the Patient's Status is Inactive
at your clinic

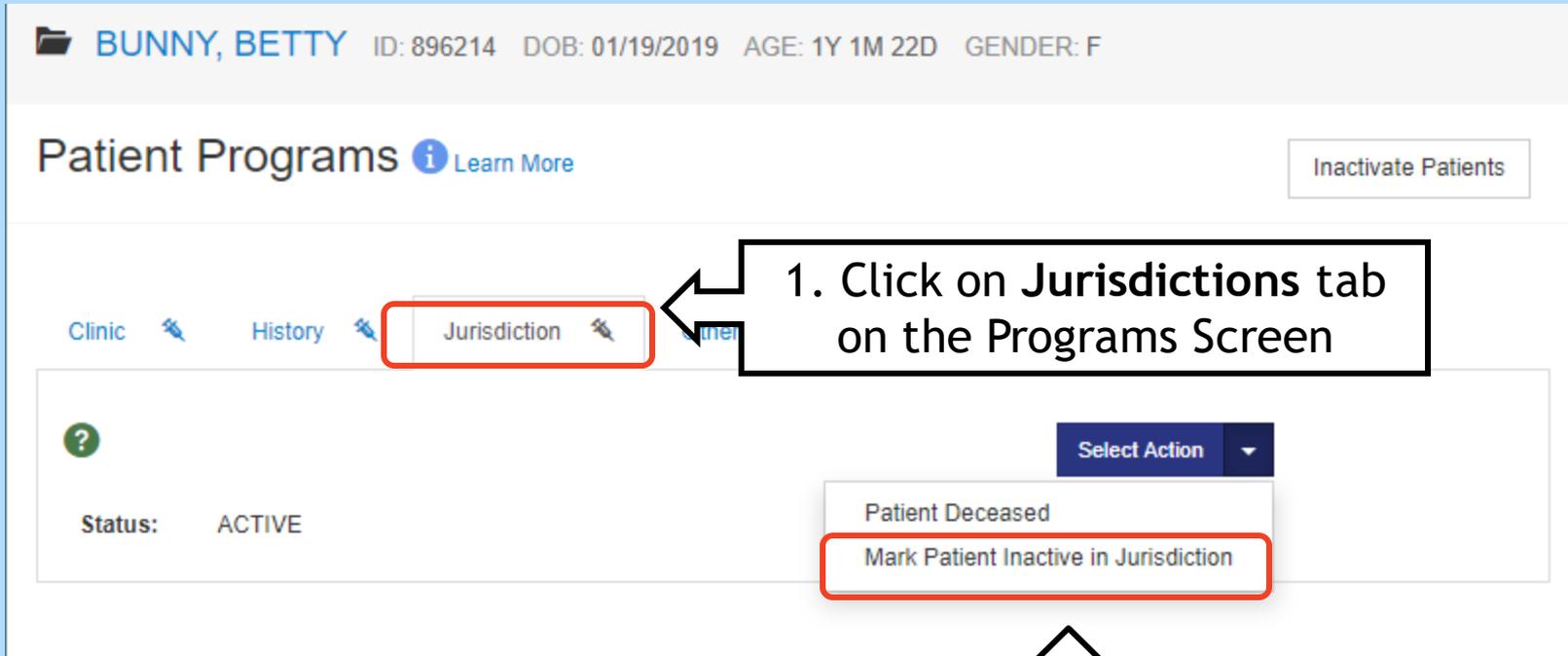


Change patient status from your jurisdiction

At the individual patient level

Changing Patient Status - Jurisdiction Level

***Only do this if you know that the patient has moved out of state**



BUNNY, BETTY ID: 896214 DOB: 01/19/2019 AGE: 1Y 1M 22D GENDER: F

Patient Programs [Learn More](#) Inactivate Patients

Clinic [History](#) **Jurisdiction** [Immunizations](#)

Status: ACTIVE Select Action

- Patient Deceased
- Mark Patient Inactive in Jurisdiction**

1. Click on **Jurisdictions** tab on the Programs Screen

2. In the **Select Action** dropdown. Click on **Mark Patient Inactive in Jurisdiction***

Inactive at Jurisdiction

Inactive In Jurisdiction

Status: *
INACTIVE 1

Reason: *
OUTSIDE JURISDICTION 2

Comment:
Patient moved out of state to New Jersey 3

4

Cancel Update

1. Change **Status** to Inactive
2. **Reason** is auto-filled
3. Enter information on where the child is going, if known in **Comments**
4. Click **Update** to save

Review Patient Status - Jurisdiction Level

BUNNY, BETTY ID: 896214 DOB: 01/19/2019 AGE: 1Y 1M 22D GENDER: F

Patient Programs [Learn More](#)

Clinic  History  Jurisdiction  Other Programs



Status: INACTIVE

Reason: OUTSIDE JURISDICTION

Select Action 

If you did this in error,
Click on **Mark patient Active in
Jurisdiction** from the dropdown

Now the Patient's Status is Inactive in the jurisdiction

* If not already done, you need to inactivate the patient from your clinic for them to truly be inactive



Change patient status from your clinic

Generate Inactive Patient Report

CT WIZ CVP TRAINING CLINIC REGION 2, CVP TRAININ... PATIENT SEARCH

It's Your Best Shot! CT WIZ Connecticut Immunization Information System

Home
Patients
Immunizations
Reports
Clinic Tools
PH 7 Management

Reports [Learn More](#)

Patient

- [IZ History/Risk/Recommendations](#)
- [Official Immunization Record](#)
- [Patient Administrative Record](#)

Forms / Informational Documents

- [ACIP Child and Adolescent Immunization Schedule](#)
- [ACIP Adult Immunization Schedule](#)
- [Clinic Contact Listing](#)
- [Product Listing](#)
- [Vaccine Information Statements \(VIS\)](#)

CT Forms and Resources

- [Training Materials](#)
- [Technical Support](#)
- [Application Help](#)

Patient Management

- [Birth Vaccinations](#)
- [Inactivate Patients](#)**
- [Patient Detail with Services](#)
- [Patient List By Insurance Source](#)
- [Patient List/Counts By Clinic Report](#)
- [Patient Reminder/Recall](#)
- [Patient Roster](#)
- [Patient VFC Eligibility History](#)
- [Patients By Birth Facility Type](#)
- [Patients First Seen](#)
- [Patients with Active Exemptions](#)
- [Patients with Adverse Reactions](#)
- [Patients with Notes](#)
- [Patients with Vaccine Refusals](#)
- [Patients with Vaccine Refusals - Datamart](#)
- [Vaccine Recall](#)
- [Patients with Precautions / Contraindications](#)

Coverage Statistics

- [Clinic Immunization Count](#)
- [Coverage Assessment Snapshot Reports](#)
- [Dosage Report](#)

1. Click on Reports

2. Scroll to the Patient Management Section

3. Click on Inactivate Patients

Inactive Patients - Search Options

Inactivate Patients ?

Cancel

Search Options

Provider

CVP TRAINING CLINIC REGION 2

Clinic

CVP TRAINING CLINIC REGION 2

Age Range From

Age Range To

Unit of Measure

Show All Patients

Show Only Patients That Qualify For Lost to Follow-up

[Qualifies for Lost To Follow-up settings](#)

Search

Last Name

First Name

Middle Name

Patient Id

Last Vaccination Date

Qualifies for Lost To Follow-up

Q

Q

Q

Q

MM/DD/YYYY

Q

- 1. Age Range From/To.** Restrict results to patients within the specified age range.
- 2. Unit of Measure.** Months or Years
- 3. Show All Patients.** When selected, the report will include all Active patients at the selected clinic.
- 4. Show Only Patients that Qualify for Lost to Follow-Up.**
 - The default settings for "Qualifies for Lost to Follow-up" is 3 unsuccessful reminder/recall attempts and at least 120 days since last vaccination is recorded in CT WiZ.
- 5. Click Search**

Inactivate Patients

Inactivate Patients Cancel

Search Options

Provider:

Clinic:

Age Range From:

Age Range To:

Unit of Measure:

Show All Patients

Show Only Patients That Qualify For Lost to Follow-up

[Qualifies for Lost To Follow-up settings](#)

| Last Name | First Name | Middle Name | Patient Id | Last Vaccination Date | Qualifies for Lost To Follow-up |
|----------------------|----------------------|----------------------|----------------------|---|-------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="MM/DD/YYYY"/> | |
| BUNNY | BUDDY | | 73978 | 06/11/2019 | |
| BUNNY | BUGS | | 896122 | 12/18/2018 | <input checked="" type="checkbox"/> |
| BUNNY | BENJAMIN | | 896145 | | |
| BUNNY | BETTY | | 896214 | 02/11/2020 | |

LOST TO FOLLOW UP
NO LONGER A PATIENT

Select either
Lost to follow up
(if available)
or
No Longer a Patient

Patients can be changed to one of the following Inactive statuses:

- Lost to Follow Up
 - These patients are indicated by the green checkmark
- No Longer a Patient

Inactivate Patients - Lost to follow up

Lost To Follow Up

Name: BUDDY BUNNY Patient Id: 896117

Status *: LOST TO FOLLOW UP

Effective Date *: 03/11/2020

| Reminder Recall | Reminder/Recall Through Date | Notification |
|-----------------|------------------------------|--------------|
| TEST 2 | 06/30/2020 | CHOOSE |
| TEST 2 | 06/30/2020 | CHOOSE |
| TEST 2 | 06/30/2020 | CHOOSE |

Close Update

Lost to Follow-Up Requirements:

- At least 3 reminder/recall attempts recorded in CT WiZ.

AND

- No vaccinations within the last 120 days

Inactivate Patients - No Longer a Patient

CLINIC REGION 2 - CVP TRAINING & PATIENT SEARCH

No Longer a Patient

| | |
|--|---|
| Name | Patient Id |
| <input type="text" value="BUDDY BUNNY"/> | <input type="text" value="73978"/> |
| Status * | |
| <input type="text" value="NO LONGER A PATIENT"/> | |
| Effective Date * | |
| <input type="text" value="03/11/2020"/> | <input type="button" value="Calendar"/> |
| Notification Method: * | |
| <input type="text"/> | |
| Notification Date: * | |
| <input type="text" value="MM/DD/YYYY"/> | <input type="button" value="Calendar"/> |
| Reason: * | |
| <input type="text"/> | |
| Comment: | |
| <input type="text"/> | |

- Complete the required fields.
 - Status
 - Effective Date
 - Notification Method
 - Notification Date
 - Reason
- In Comment, add the clinic or state the patient is moving to, if known. If Reason OTHER is selected, a Comment is required.

How To Get Help

- Click on the  located at the top of the page to get a description of whichever screen you are on.
- Some pages have a [Learn More](#) link. Click on this to see short "How to" videos. These appear on a separate page so you can play videos while navigating through CT WiZ.
- Visit the CT WiZ training page [here](#). The training page has numerous documents and step by step videos to help you.
- Still can't find an answer to your question? After you exhausted all the of the above options, submit a help desk ticket to get the quickest answer. You may do so [here](#).

