Managing Patient Status

Inactivating patients at the clinic and/or in the jurisdiction

Version 1_3.11.20

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

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

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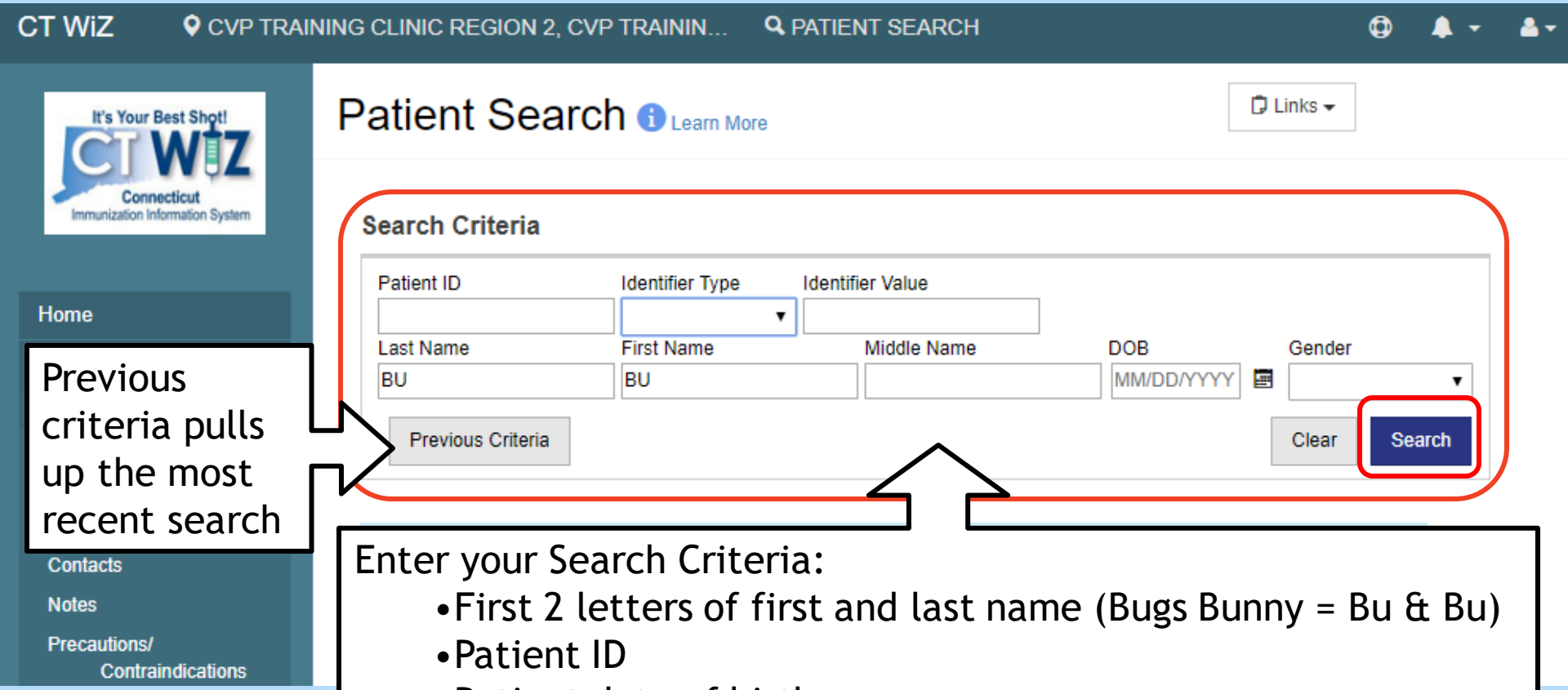
Change patient status from your clinic

At the individual patient level

Searching for the patient



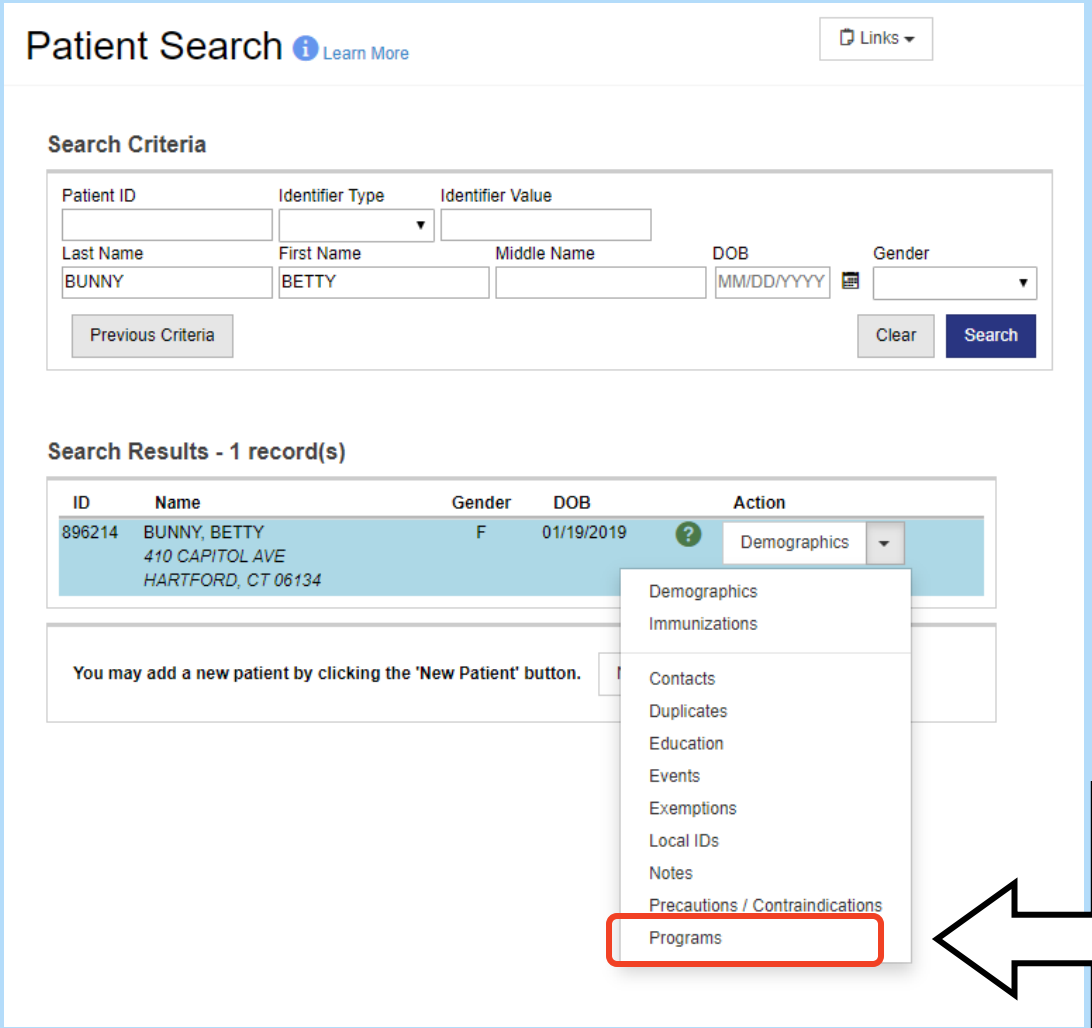
Previous criteria pulls up the most recent search

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

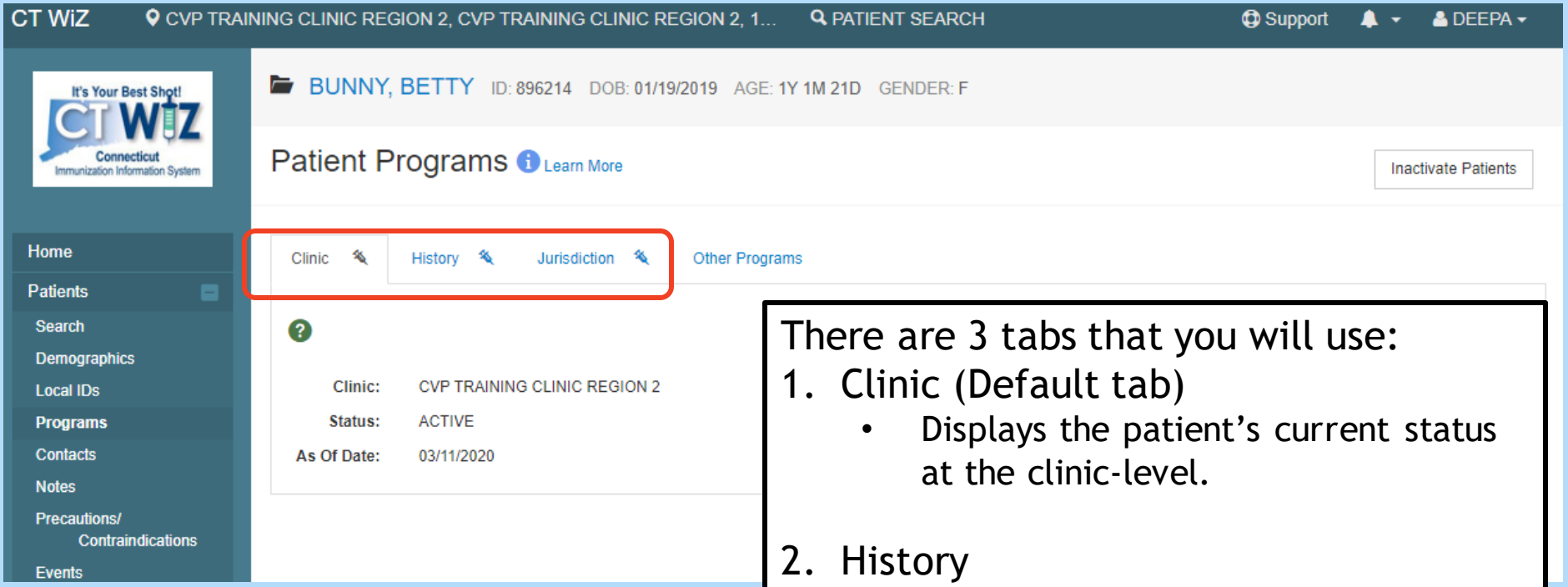
Getting to the Programs Screen



Find the correct patient in the search results

Click Programs from the drop-down menu

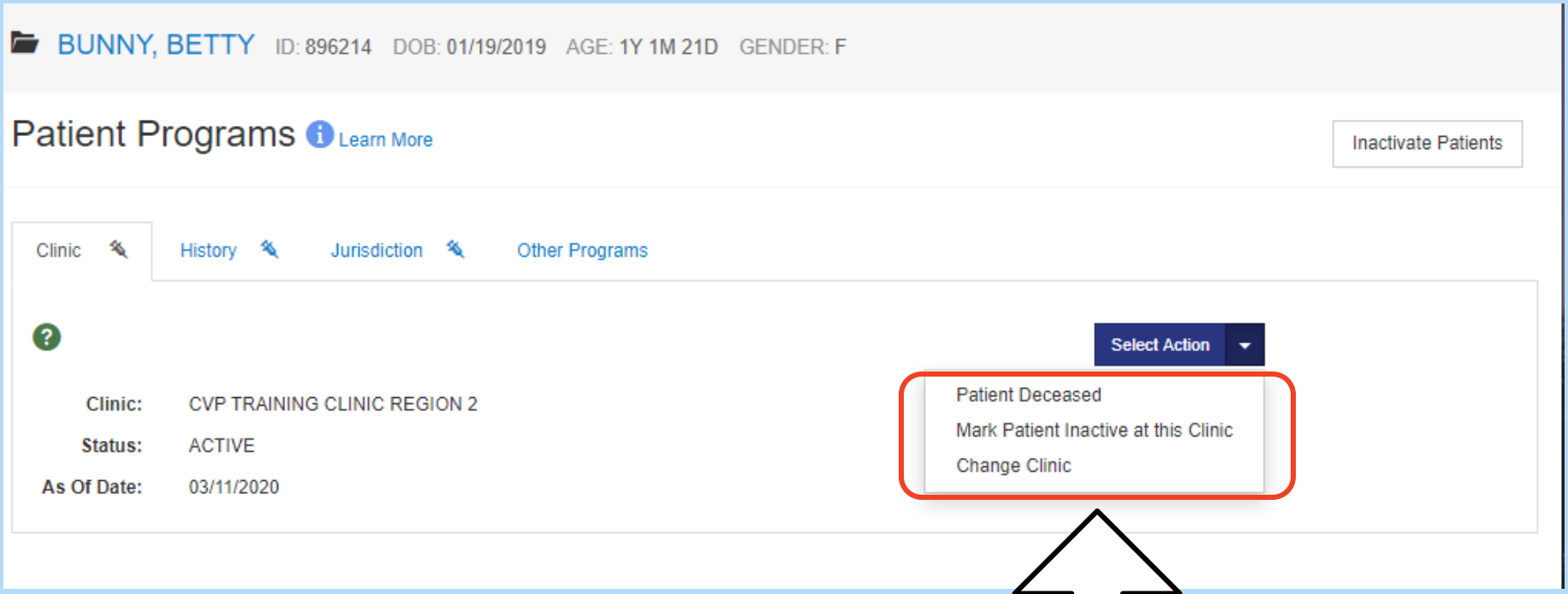
The Programs Screen



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



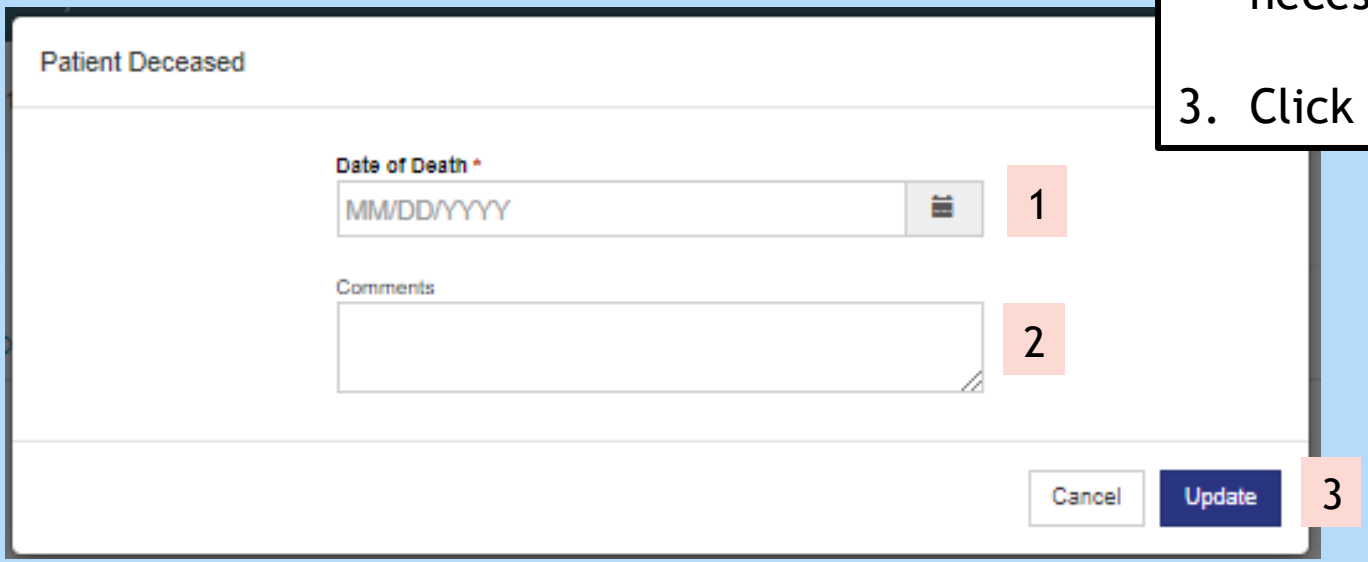
You can mark the patient:

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

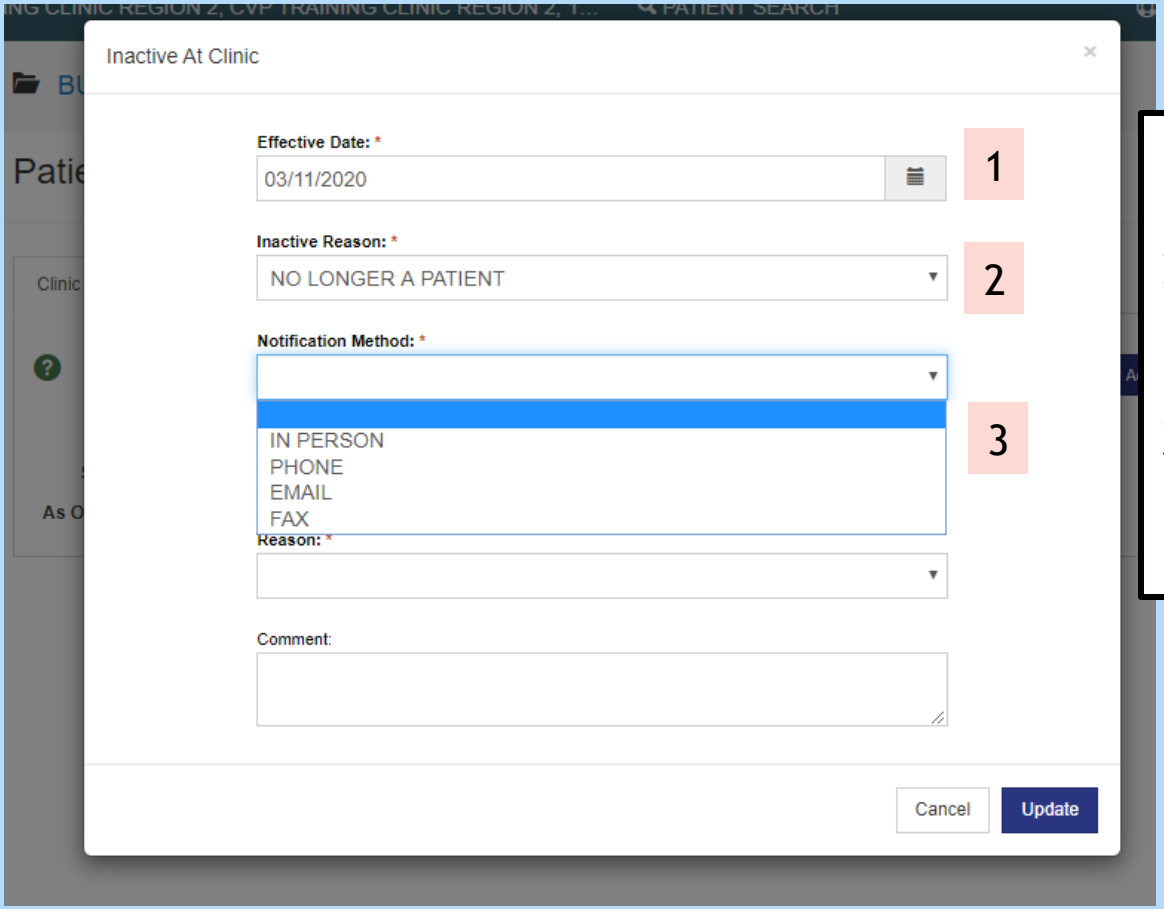
*You can only change the clinic if you are affiliated with both the old and new clinics

Marking a Patient Deceased

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

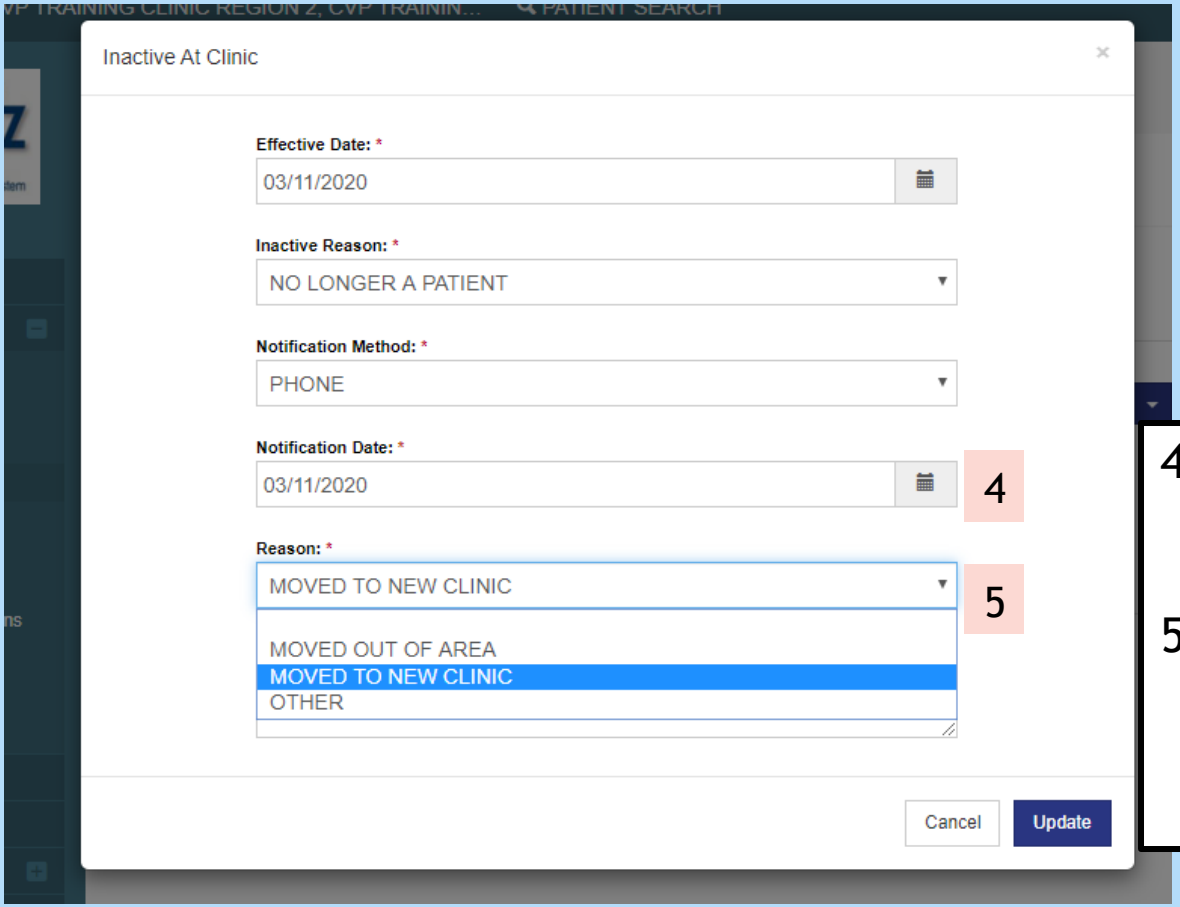


Inactive at clinic - 1



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

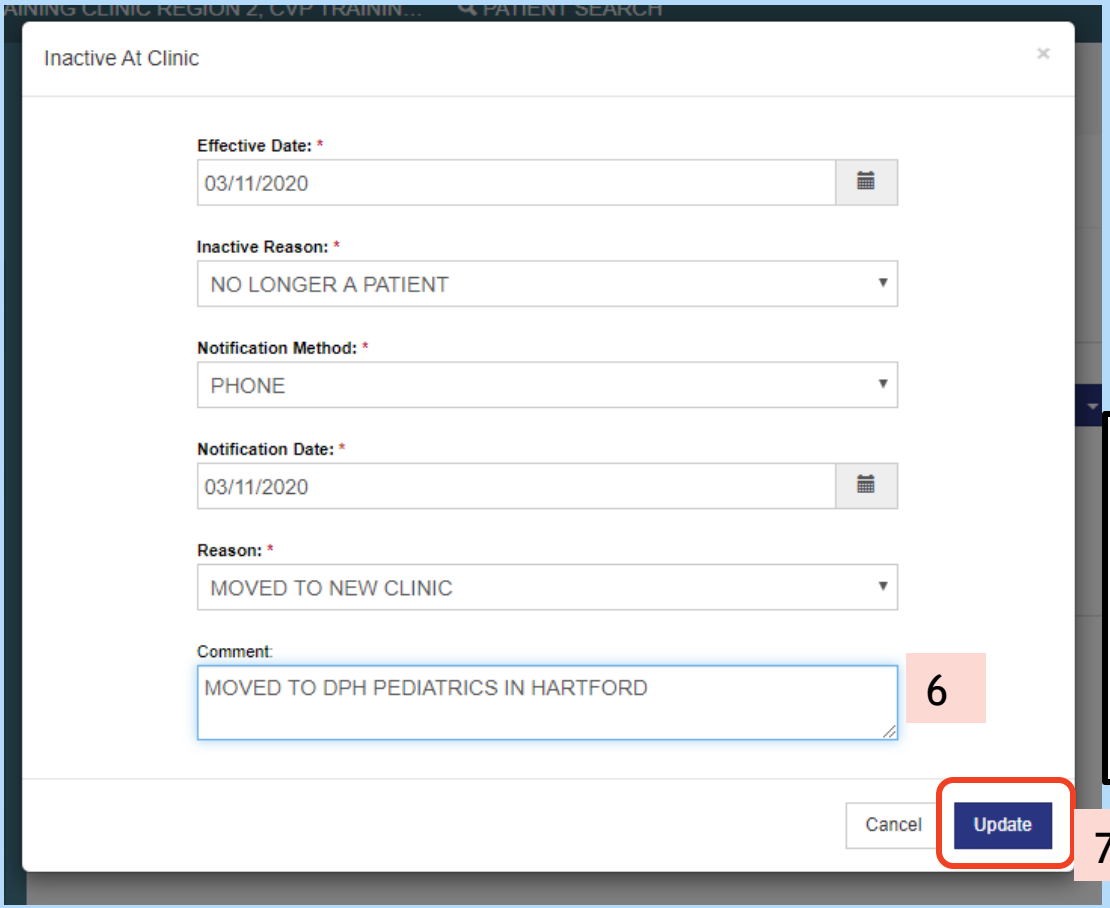
Inactive at clinic – 2 Con't



4. Enter the **date you were notified**

5. Select **'Moved out of area'** or **'Moved to new clinic'** from the drop down for reason

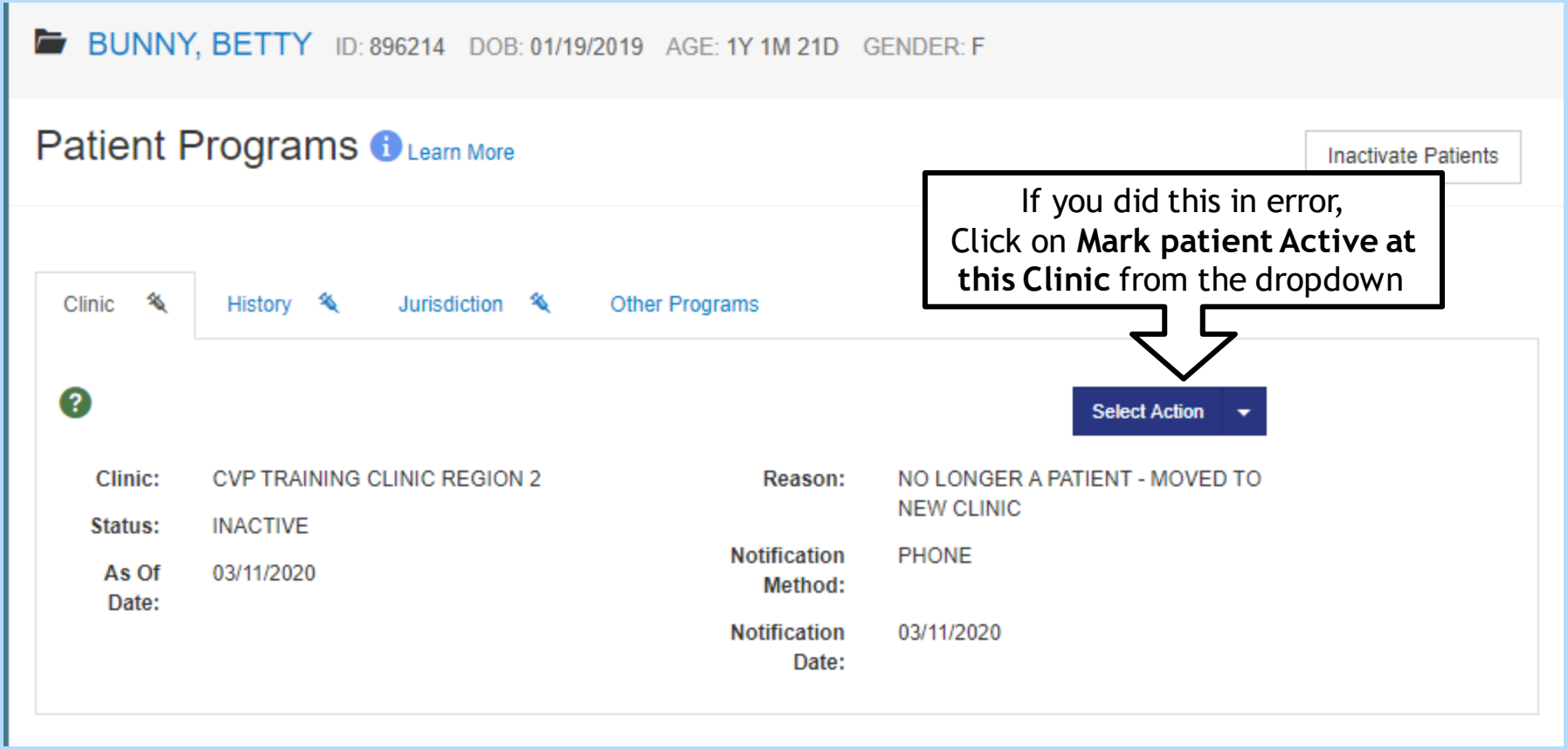
Inactive at clinic – 3 Con't



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

7. Click **Update** to save

Review Patient Status - Clinic Level



Now the Patient's Status is Inactive at your clinic

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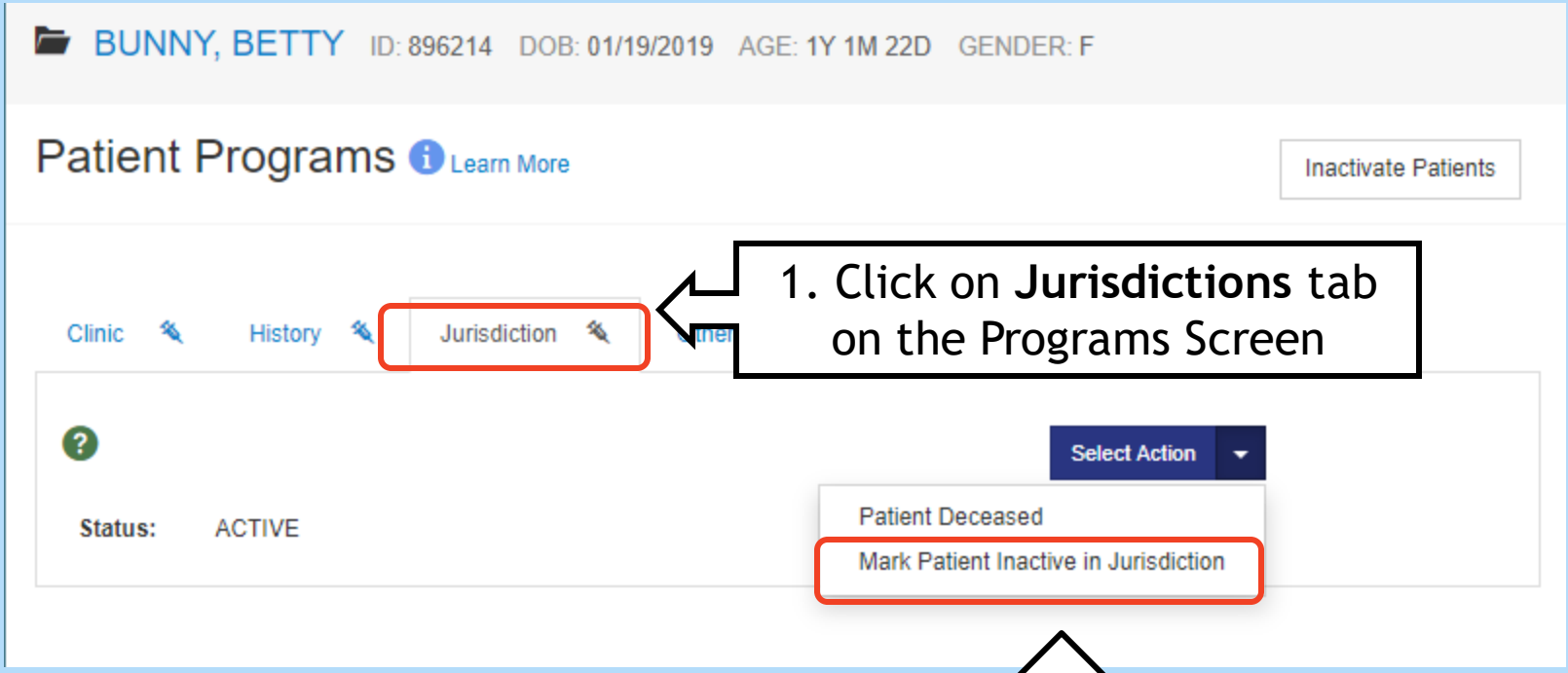
Change patient status from your jurisdiction

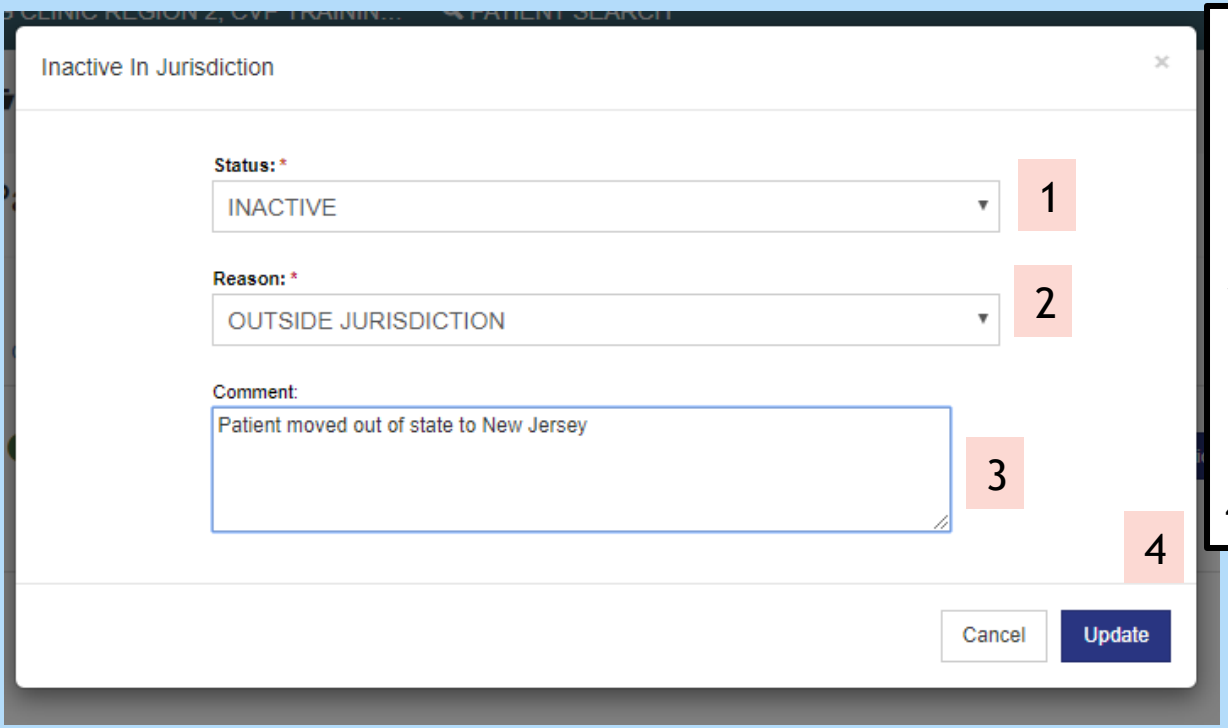
At the individual patient level

Changing Patient Status - Jurisdiction Level

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

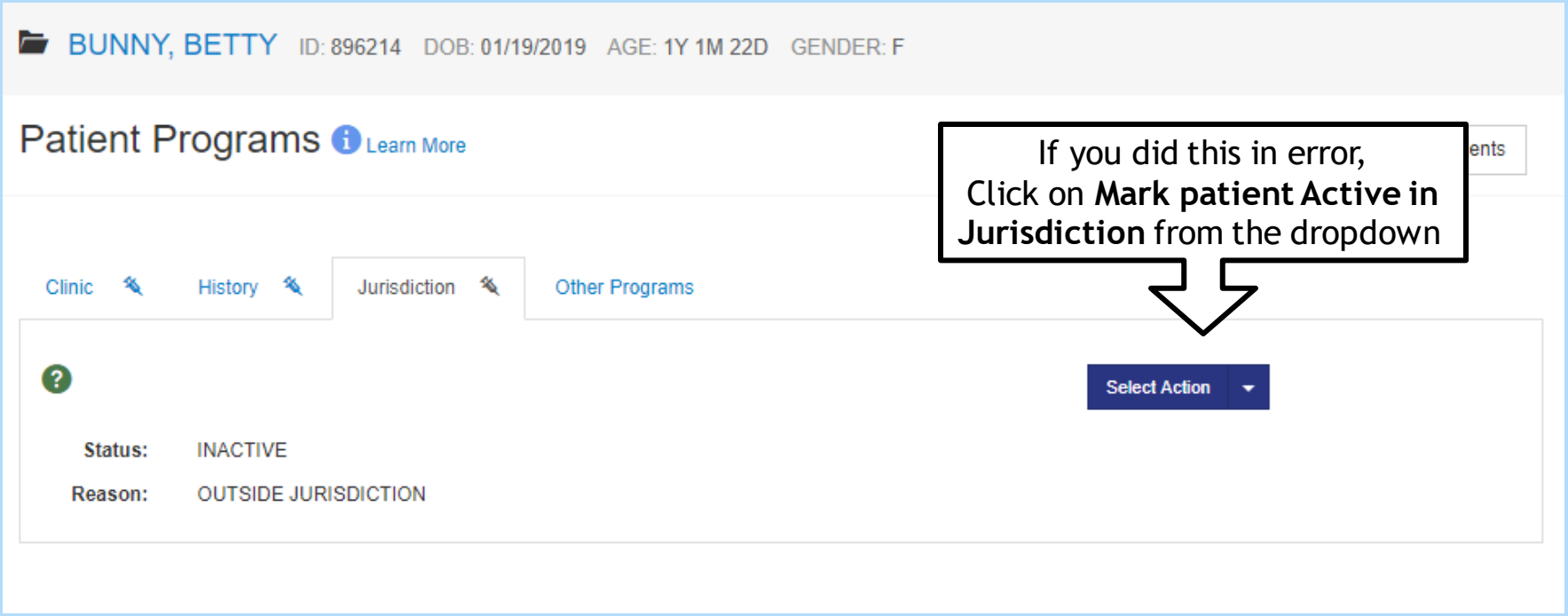


Inactive at Jurisdiction



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



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

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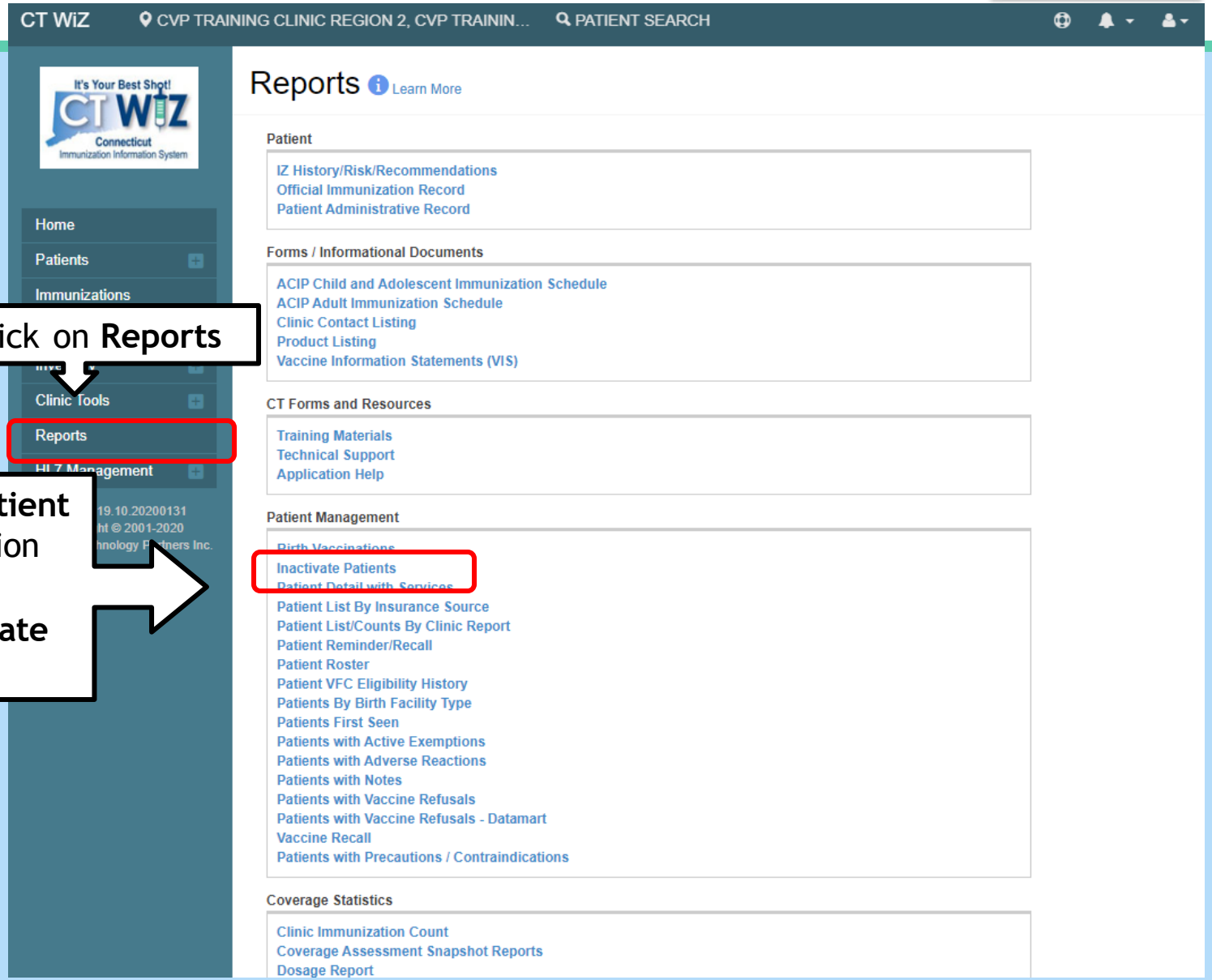
Change patient status from your clinic

Generate Inactive Patient Report

DPH
Connecticut Department of Public Health

Connecticut Department of Public Health
Keeping Connecticut Healthy

Patient Management Report

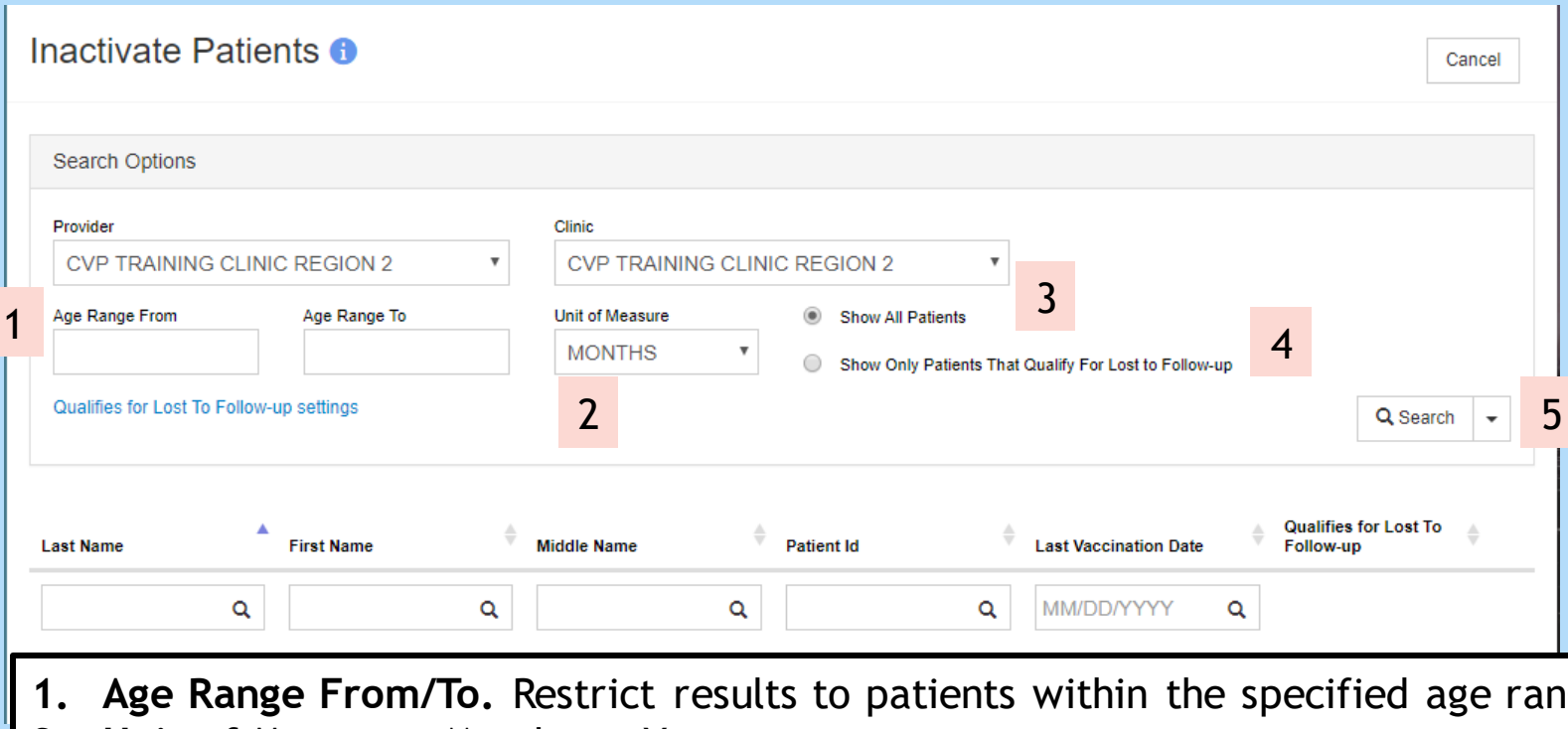


1. Click on **Reports**

2. Scroll to the **Patient Management** Section

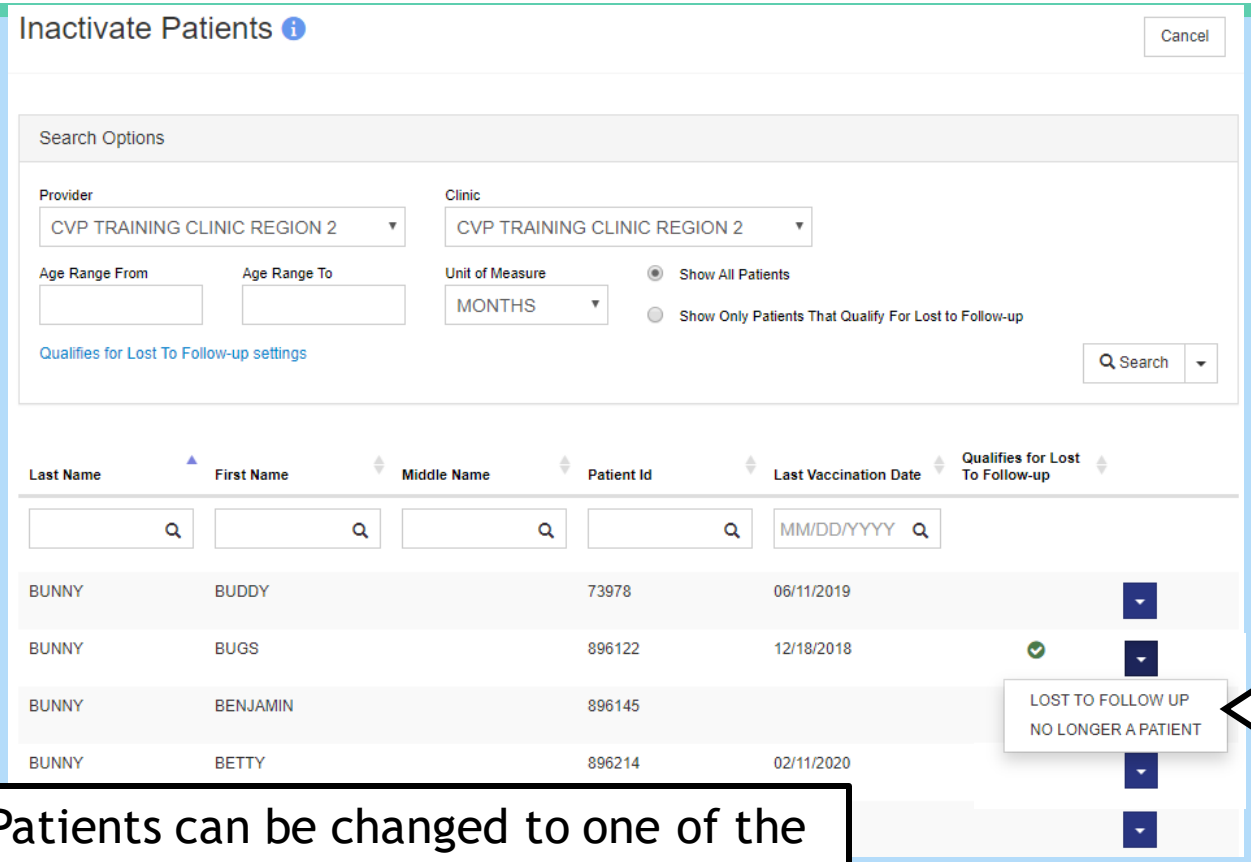
3. Click on **Inactivate Patients**

Inactive Patients - Search Options



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

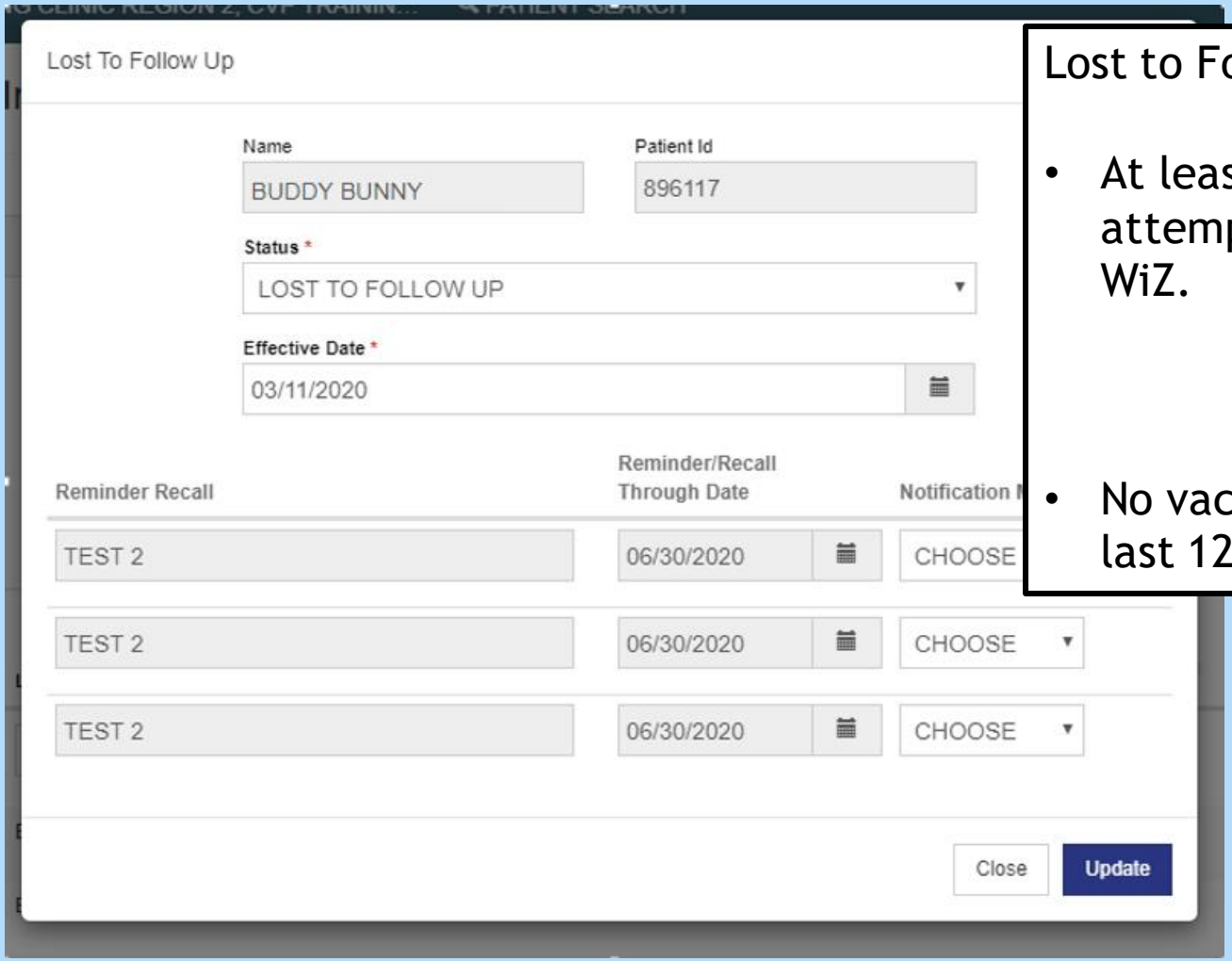


Select either
Lost to follow up
(if available)
or
No Longer a Patient

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



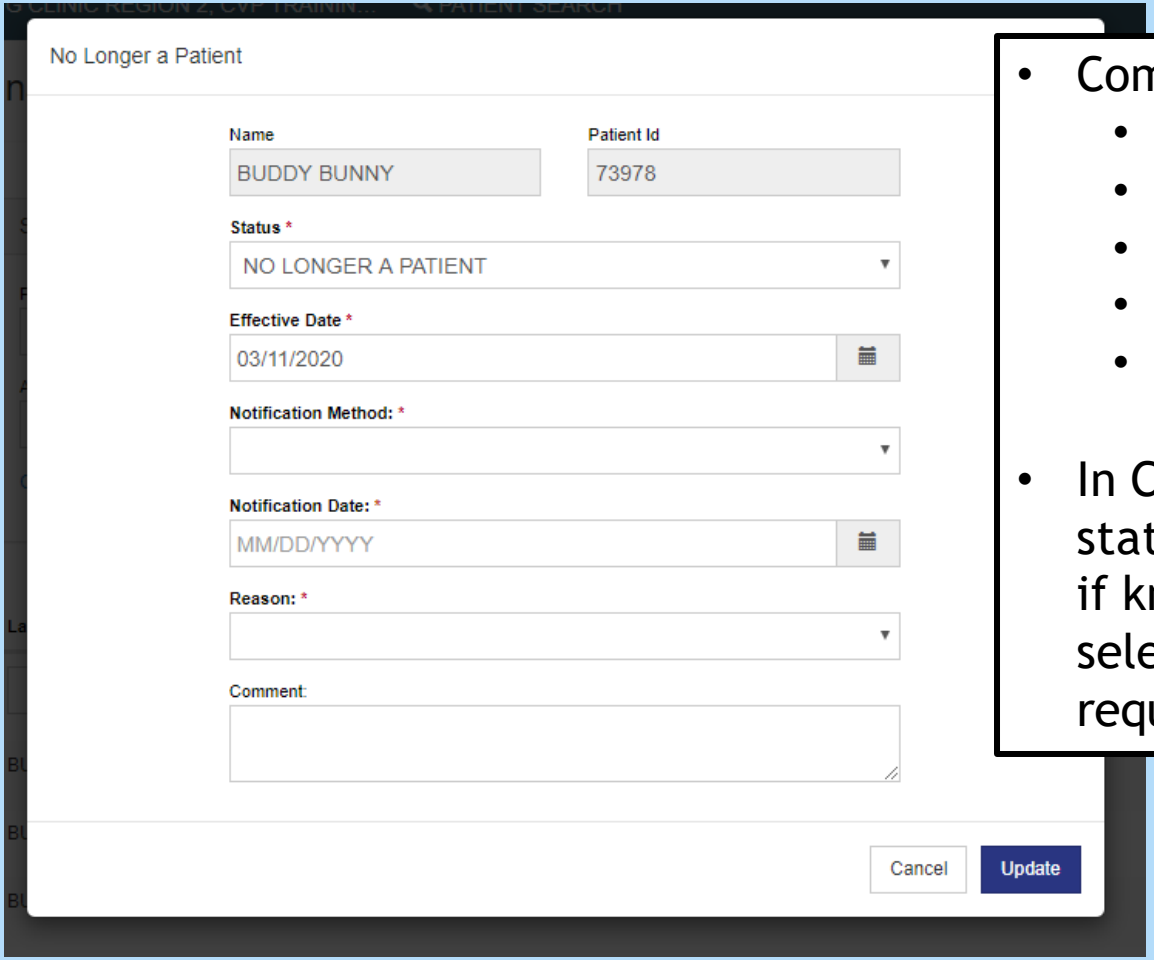
Lost to Follow-Up Requirements:

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

AND

- No vaccinations within the last 120 days

Inactivate Patients – No Longer a Patient



- 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

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.