



Managing Patient Status

Activating patients at the clinic

Version 1_3.11.20

Things You Should Know

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

There are 2 ways to claim ownership of a patient:

1. When the patient's new clinic 'administers a shot', that clinic automatically takes ownership of that patient in CT WIZ. If this is not the patient's medical home, do not take ownership, uncheck the box "Do not set this clinic as the default clinic". Ownership won't happen with SBHC, Health Dept, Urgent Care, etc. (Unless the patient is newly created by them).
2. The clinic manually claims the patient using the Programs module.



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="BU"/>	<input type="text" value="BU"/>	<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"/>

Previous criteria pulls up the most recent search

Enter your Search Criteria:

- First 2 letters of first name 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)

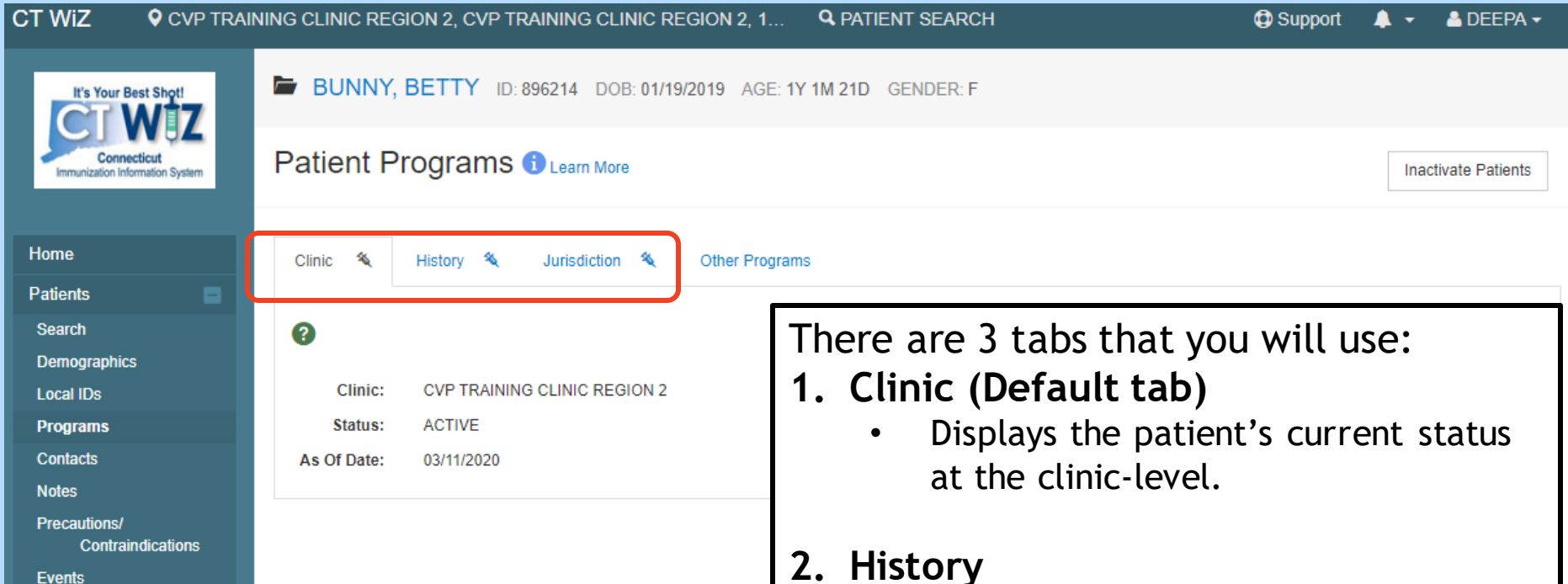
ID	Name	Gender	DOB	Action
896214	BUNNY, BETTY 410 CAPITOL AVE HARTFORD, CT 06134	F	01/19/2019	<input type="button" value="Demographics"/>

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 from 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)

Change 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


Click on Change Clinic

1. Search for your clinic name from the drop-down menu
2. Enter the **Effective Date**
3. Click **Update** to save

Change Clinic

New Clinic: *

TIM

[TIM TAYLOR] CVP TRAINING REGION 3 - C1001P1001 (1001)

MM/DD/YYYY

Comment:

Cancel Update

1

2

3

Review Patient Status - Clinic Level

 **BUNNY, BETTY** ID: 896214 DOB: 01/19/2019 AGE: 1Y 2M 10D GENDER: F

Patient Programs [Learn More](#)

[Add Patients](#)

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




Clinic: CVP TRAINING REGION 3
Status: ACTIVE
As Of Date: 03/29/2020

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

Select Action 

Now the patient is active at your clinic

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](#).

