



# 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 they are a medical home (this won't happen with SBHC, Health Dept unless the patient is newly created by them, etc).
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
BUNNY	BETTY	<input type="text"/>	MM/DD/YYYY <input type="text"/>	<input type="text"/>
<input type="button" value="Previous Criteria"/>		<input type="button" value="Clear"/> <input type="button" value="Search"/>		

### Search Results - 1 record(s)

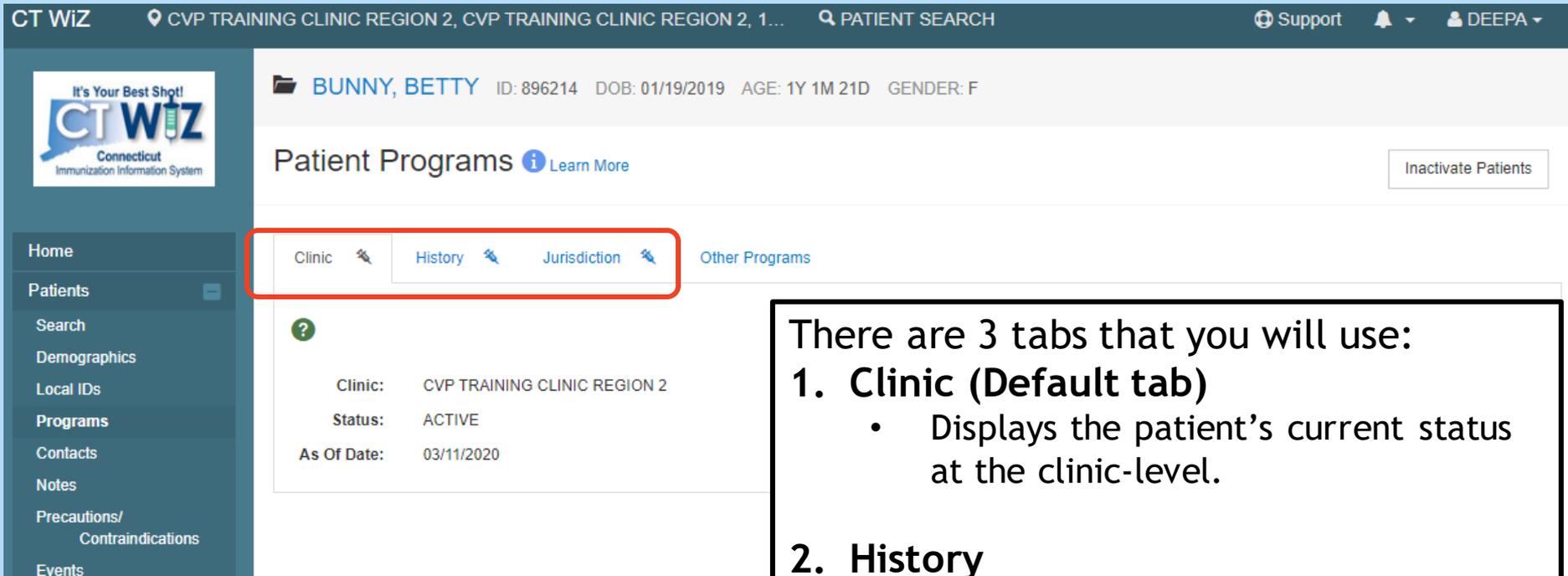
ID	Name	Gender	DOB	Action
896214	BUNNY, BETTY 410 CAPITOL AVE HARTFORD, CT 06134	F	01/19/2019	<input type="button" value="Demographics"/>

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

Home Patients Search Demographics Local IDs Programs Contacts Notes Precautions/Contraindications Events

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



2

Comment:

Cancel

Update

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](#).

