# Quick Reference Guide - Patient Search

Username/Login and Password
- Passwords will expire every 90 days. Once expired, the system will prompt you to change your password.
- Accounts not accessed for over 90 days will be deactivated.
- If you are an IRMS Client user (access to multiple facilities within your organization), you will be asked to select a facility each time you log in. This step ensures the proper allocation of your vaccine inventory.
- For added security please close the browser window after logging out of VacTrAK.

Diagram 1: Registry Navigation Menu
The Navigation Menu is collapsible. Click on the bold Menu Heading to expand or collapse the Menu Heading.
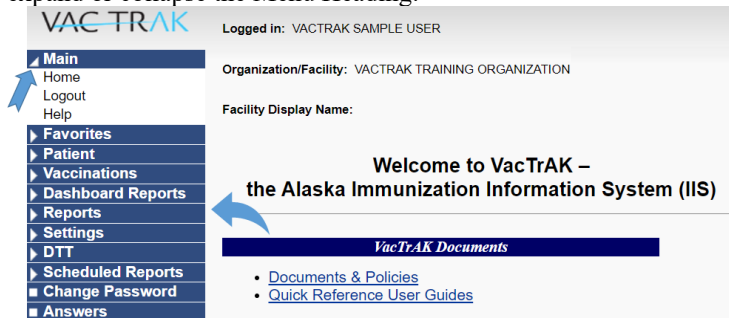

The Navigation Menu, on the left-hand side of the screen, contains all available options to move throughout VacTrAK. User permissions will affect which options are visible.

Search for a Patient
1. Using the navigation menu click on the Patient menu heading.
2. Click on the words Search/Add.
3. Enter the search criteria such as patient name and/or birth date (Enter the birth date as a string of numbers: i.e., May 8, 2005, as 050805 or 05082005.) Name fields are not case-sensitive.
4. Click Search or hit the Enter key on your keyboard.
5. If the patient appears in the Search Results, click on the patient's name to view the patient's demographic information.
6. Check the Vaccination Quick Reference Guide for the steps to view a patient's immunization history.

Diagram 2: Patient Search Page
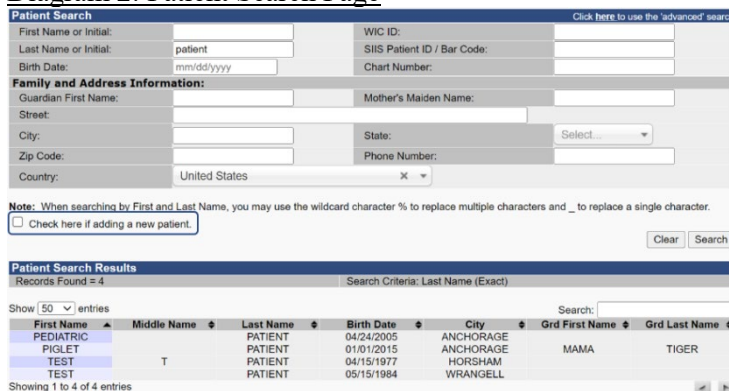
When two or more records are found, look for differences such as Middle Name or Birth Date to select the appropriate patient.

Search Tips
All children born in the state of Alaska are now added to the registry via the birth record system. Patients who move to Alaska are easy to add!

First, try searching by:
- Patient's first name, last name, and birth date

Then, if you do not find the patient, try searching by:
- Patient's first initial and date of birth
- Patient's last name initial and date of birth
- Patient's first and last names without the date of birth
- Chart Number: If the patient's chart number has been entered on the Patient Demographic Page, it is possible to search for the patient by chart number.

Mousing over the search results will highlight a line. Clicking anywhere in that line will select the patient and bring you to the Patient Demographics page.

Adding a New Patient
Make sure you have used the above Search Tips before adding a new patient to help reduce duplicate records.
1. When using the Simple Search Page click the "Check here if adding a new patient" box at the bottom of the Patient Search fields (circled on Diagram 2).
2. Enter all the required information (highlighted in red) then click Search.
3. A dialog box will appear with one of the following messages:
   - Before adding, make sure the patient you want to add is not listed in the Patient Search Results.
   - This record already exists in the database. An exact match has been found.

NOTE: If the system finds an exact match, the system will not allow you to add a new record.

4. Click OK to close the box.
5. If a possible match is found, select the patient and review for errors such as typos or misspellings.
6. If no match is found click Add Patient. The system will go to the Patient Demographic page.
7. Enter patient information into the appropriate fields.
8. Click Add Patient at the bottom of the page to add the patient to VacTrAK

Update Patient Demographics

<u>Duplicate Patient Records</u>

VacTrAK's system is designed to minimize the number of duplicate patient and vaccination records within it; however, it is still possible for duplicates to occur. If you identify a duplicate patient record in VacTrAK:

1. Click the Report Duplicates button at the bottom of the patient search results screen.
2. Select the Reason for deduplication, click the box next to 2 or more patient records that need to be merged,
3. Click Report Duplicates a second time.
4. The next page will allow you to select the primary record and submit the request for VacTrAK review.

<u>Update/Edit a Patient Record</u>

1. On the Patient Demographic page (see Diagram 3) click the Edit button on the bottom.
2. You will be brought to the Patient Demographic Edit page. All fields can now be edited.
3. Make modifications in the appropriate fields. (See Editing Guide)
4. Click Save to keep the changes.
5. To cancel changes, you may click Cancel to go back to the previous screen.

Diagram 3: Patient Demographics Page

<u>Editing Guide</u>

If you wish to edit any field on the demographic page, the system will not let you submit your changes unless you have supplied data for all the required fields.

Required Fields:

- First and Last Name: Some Non-English characters may not display correctly.
- Date of Birth: If an attempt is made to change a patient's birthdate to a date earlier than the first immunization, an error will display.
- Sex: Confirm that the patient's self-reported gender (birth or preferred) is marked.
- Race: Select all applicable options of the patient's self-reported race. As much as possible avoid selecting Unknown.
- Ethnicity: Select a single option for the patient's self-reported ethnic group.
- Address: The best available address for a patient. Mark if valid and/or primary address. Including an email address is optional but will help patients connect with their electronic health records.
- Phone Number: The best available phone number for a patent. Select the appropriate Phone Use Code.

Notable Optional Fields:

- Inactivate Patients: To inactivate a patient, click the menu next to Organization Level. Select the appropriate reason for inactivation from the dropdown menu. The patient will no longer be tied to your organization, thus removing them from Reminder/Recall and other reports.
- Birth Order and Multiple Birth Count: If the patient is a twin, triplet, etc., enter the number of total births in the Multiple Birth Count field and the patient's birth order in the Birth Order field.
- Family & Contact (if under 18 years of age): Include the contact's First and Last Name, then mark if they are a Guardian.
- Medical Home:
  o Physician: If you are a multi-physician office, you can link a patient to a particular physician. Click on the appropriate name from the dropdown menu. This will allow you to run several reports (Reminder/Recall, vaccine totals, etc.) by the physician.
  o Chart Number: Adding the patient's chart number will allow you to search by that number in the Patient Search Page.