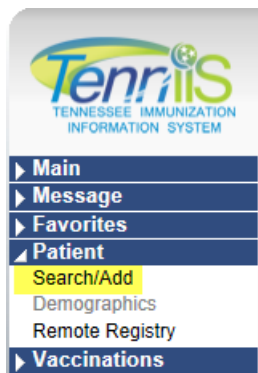


Quick Reference Guide Patient Search, Add, and View

Search for a Patient

- 1) Using the Navigation Menu, click on the **Patient** Menu Heading.
- 2) Click **Search/Add**.
- 3) Enter the search criteria using the tips below.
- 4) Click Search or press Enter.
- 5) Select the patient from the search results to view the patient's demographic information (See *Patient Search Screen* diagram).
- 6) Check the "Viewing, Adding, and Editing Vaccinations" Quick Reference Guide for steps to view a patient's vaccination history.



Search Tips:

Try searching by:

- Patient's first name, last name, and birth date.
- First initial of first name and birth date.
- First initial of last name and birth date.
- First and last name without birth date.
- Wildcard "%" or "_" and birth date.

| Patient Search | | Click here to use the 'advanced' search | |
|---|----------------------|---|--|
| First Name or Initial: | <input type="text"/> | WIC ID: | <input type="text"/> |
| Last Name or Initial: | <input type="text"/> | SIIS Patient ID / Bar Code: | <input type="text"/> |
| Birth Date: | <input type="text"/> | Chart Number: | <input type="text"/> |
| | | Organization Medical ID: | <input type="text"/> |
| Family and Address Information: | | | |
| Guardian First Name: | <input type="text"/> | Mother's Maiden Name: | <input type="text"/> |
| Street: | <input type="text"/> | | |
| City: | <input type="text"/> | State: | <input type="text" value="Select..."/> |
| Zip Code: | <input type="text"/> | Phone Number: | <input type="text"/> |
| <p>Note: When searching by First and Last Name, you may use the wildcard character % to replace multiple characters and _ to replace a single character.</p> <p><input type="checkbox"/> Check here if adding a new patient.</p> | | | |
| | | | <input type="button" value="Clear"/> <input type="button" value="Search"/> |

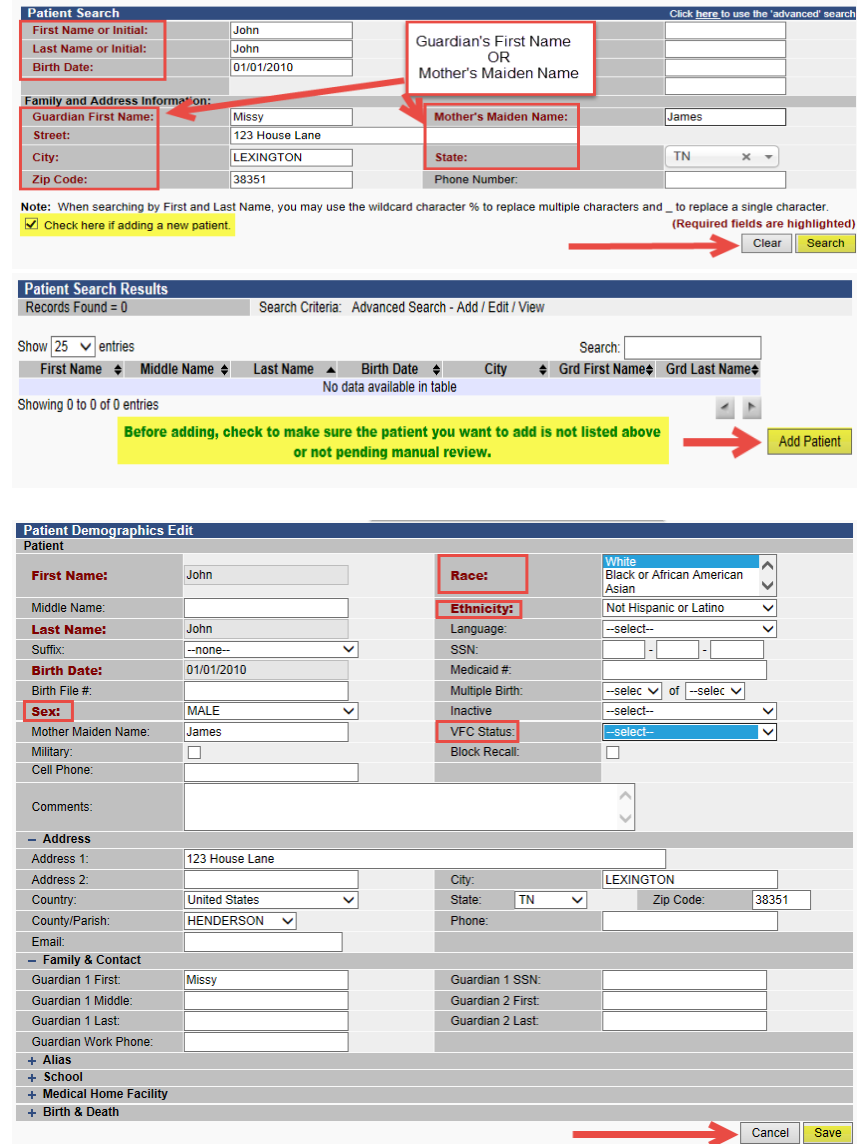
For Online Ordering Help contact the STC Helpdesk at: (844) 206-9927 Monday thru Friday 8AM to 5PM CDT or email at: TennIIS.Help@tn.gov
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Quick Reference Guide Patient Search, Add, and View

Adding a New Patient

Before attempting to add a new patient, search using several methods listed to avoid duplicate records.

- 1) From the **Search/Add** Page click the “Check here if adding a new patient” checkbox at the bottom of the Patient Search field (see diagram).
- 2) Enter all of the REQUIRED information (highlighted in RED), First Name, Last Name, Birth Date, Guardian’s first name OR Mother’s Maiden Name, and complete mailing address. Phone number is optional.
- 3) Click **Search**.
- 4) A dialog box will appear with one of the following messages:
- 5) Before adding, make sure the patient you want to add is not listed in the *Patient Search Results*.
- 6) This record already exists in the database. An exact match has been found.
 - a. Click **OK** to close the box.
- 7) If a positive match is found, select the patient. If the system finds an exact match you will not be able to add a new patient record.
- 8) If no match is found, click the **Add Patient**. The system will go to the *Patient Demographic* Page.
- 9) Enter patient information into the appropriate fields (see *Patient Demographic* diagram).
- 10) Click **Add Patient**.



The image shows two screenshots from a web application. The top screenshot is the 'Patient Search' form. It has several input fields: 'First Name or Initial:', 'Last Name or Initial:', 'Birth Date:', 'Guardian's First Name OR Mother's Maiden Name:', 'Family and Address Information:' (including 'Guardian First Name:', 'Street:', 'City:', 'Zip Code:', 'Mother's Maiden Name:', and 'State:'). A checkbox 'Check here if adding a new patient.' is checked. A yellow box at the bottom says 'Note: When searching by First and Last Name, you may use the wildcard character % to replace multiple characters and _ to replace a single character. (Required fields are highlighted)'. Red boxes highlight the 'First Name or Initial:', 'Last Name or Initial:', 'Birth Date:', 'Guardian's First Name OR Mother's Maiden Name:', 'Guardian First Name:', 'Street:', 'City:', 'Zip Code:', 'Mother's Maiden Name:', and 'State:' fields. Red arrows point from these fields to the 'Search' button. The bottom screenshot is the 'Patient Search Results' page. It shows 'Records Found = 0' and a table with columns for 'First Name', 'Middle Name', 'Last Name', 'Birth Date', 'City', 'Grd First Name', and 'Grd Last Name'. A yellow box at the bottom says 'Before adding, check to make sure the patient you want to add is not listed above or not pending manual review.' and a red arrow points to the 'Add Patient' button. The bottom screenshot is the 'Patient Demographics Edit' form. It has many input fields: 'First Name:', 'Middle Name:', 'Last Name:', 'Suffix:', 'Birth Date:', 'Birth File #:', 'Sex:', 'Mother Maiden Name:', 'Military:', 'Cell Phone:', 'Race:', 'Ethnicity:', 'Language:', 'SSN:', 'Medicaid #:', 'Multiple Birth:', 'Inactive:', 'VFC Status:', 'Block Recall:', 'Comments:', 'Address:' (with sub-fields for 'Address 1:', 'Address 2:', 'Country:', 'County/Parish:', 'City:', 'State:', 'Zip Code:', 'Phone:'), 'Family & Contact:' (with sub-fields for 'Guardian 1 First:', 'Guardian 1 Middle:', 'Guardian 1 Last:', 'Guardian Work Phone:', 'Guardian 1 SSN:', 'Guardian 2 First:', 'Guardian 2 Last:'), 'Alias:', 'School:', 'Medical Home Facility:', and 'Birth & Death:'. Red boxes highlight the 'Race:', 'Ethnicity:', 'Sex:', and 'VFC Status:' fields. Red arrows point from these fields to the 'Save' button.

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Quick Reference Guide Patient Search, Add, and View

Update or Edit a Patient's Demographic Record

The demographic screen is split into sections – this guide will cover the most used fields/sections of the demographic screen.

- 1) Search for a patient.
- 2) Select the patient.
- 3) Click **Edit** (bottom of the *Patient Demographic screen*).
- 4) Edit the needed fields on the *Patient Demographic Edit Page*.
- 5) Click **Save**.

Patient Demographic Edit Section

- **Language**- Select English or Spanish
- **Multiple Birth**- If the patient is a twin, triplet, etc. enter the birth order in the first dropdown and the total number of births in the second dropdown.
- **Inactivate Patient** – Use the inactive dropdown menu to select the appropriate reason for inactivation.
- **VFC Status** – Select the patient's VFC status from the dropdown box in order to meet VFC documentation standards.

Address Section

Enter the following fields to update or enter the patient's address:


- Address 1 – street or PO Box number
- Address 2 – apartment number
- Enter the zip code and the correct city, state, and county will automatically populate for you.

Alias Section

- Enter a nickname, maiden or second last name into these fields and you can search by the alias name.
- Click **Save**.

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Quick Reference Guide Patient Search, Add, and View

| Patient Demographics Edit | | | |
|---|--------------------------|--------------------------|--|
| Patient | | | |
| First Name: | John | Race: | White |
| Middle Name: | | Ethnicity: | Black or African American |
| Last Name: | John | Language: | Asian |
| Suffix: | --none-- | SSN: | |
| Birth Date: | 01/01/2010 | Medicaid #: | |
| Birth File #: | | Multiple Birth: | 1 of 2 |
| Sex: | MALE | Inactive: | --select-- |
| Mother Maiden Name: | James | VFC Status: | Medicaid |
| Military: | <input type="checkbox"/> | Block Recall: | <input type="checkbox"/> |
| Cell Phone: | | Comments: | |
| - Address | | | |
| Address 1: | 123 House Lane | | |
| Address 2: | | City: | LEXINGTON |
| Country: | United States | State: | TN |
| County/Parish: | HENDERSON | Zip Code: | 38351 |
| Email: | Missy@fakemail.com | | |
| - Family & Contact | | | |
| Guardian 1 First: | Missy | Guardian 1 SSN: | |
| Guardian 1 Middle: | | Guardian 2 First: | James |
| Guardian 1 Last: | | Guardian 2 Last: | |
| Guardian Work Phone: | | | |
| - Alias | | | |
| First Name: | Jim | Last Name: | |
| + School | | | |
| + Medical Home Facility | | | |
| + Birth & Death | | | |
|  | | | <input type="button" value="Cancel"/> <input style="background-color: #ffff00;" type="button" value="Save"/> |

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