Description of this guide:

This guide describes basic TennIIS functionality for **MEDICAL OFFICE USERS**. This guide does not include health department, pharmacy, or school/childcare facility users (see separate quick reference guides for alternate user types).

Included in this guide:

- Searching for a Patient
- Adding a Patient
- Editing Demographic Information
- Viewing a Patient's Vaccinations
- Adding Administered Vaccinations
- Adding Historical Vaccinations
- Editing Vaccination Information
- Deleting Vaccinations
- Generating the official TN Certificate of Immunization
- Changing Patient Status Between Active/Inactive
- Adding Vaccinator Name as Default
- Adding Route and Site as Default
- Adding Vaccination Volume as Default

Please contact TennIIS.Training@tn.gov or 844-206-9927 for questions about this quick reference guide.
Searching for a Patient

1) Using the Navigation Menu, click on the “Patient” menu heading.

2) Click “Search/Add”.

3) Enter search criteria using these three search tips:
   - Enter patient’s first name and last name
   - Enter patient’s first name or last name and birth date
   - Enter “%” (wildcard) in the first and last name fields to replace multiple characters
4) Click “Search”.

5) TennIIS will take you directly to the Patient Demographic Master View if an exact match is found.

   If multiple results display, select the correct patient to view the Patient Demographic Master View.

   Sort Patient Search Results by clicking on the black arrow located at the top of each column.

6) Patient Demographic Master View will display.

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Adding a Patient

Note: Before attempting to add a new patient, search using all methods listed above to avoid creating duplicate records.

1) From the Patient Search/Add Page click the “Check here if adding a new patient” checkbox at the bottom of the Patient Search field.

2) Enter all of the required information (highlighted in red):
   - First name or Initial
   - Last name or Initial
   - Birth date
   - Guardian’s first name
   - Mother’s maiden name
   - Complete mailing address

3) Click “Search”.

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4) A dialog box will appear with one of the following messages:

- “Before adding, check to 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.”

Click “OK” to close the dialog box.

Note: If a positive match is found, select the patient from the search results. If TennIIS finds an exact match of the record, you will not be able to add a new patient.

5) If no match is found or the patient you are searching for is not listed in the search results, click “Add Patient”.

6) TennIIS will then automatically go to the Patient Demographics Edit.

Enter patient information into the appropriate fields then click “Save” to complete adding new patient.

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Editing Demographic Information

1) **Search for the patient** and select the correct patient from the list.

2) From the Patient Demographics Master View, click “Edit”.

3) Edit the desired fields and click “Save”.

Note: The “Phone Number” section contains an “Add” button to enter new phone numbers. Once entered, user will additionally have “Edit” and “Remove” keys to use respectively for the “Phone Number” section only.
4) Editing optional patient demographics:

**Patient Demographic Edit:**
- **Language** – select language.
- **Birth Order** – if the patient is a twin, triplet, etc., enter the birth order in the first dropdown.
- **Inactivate Patient** – use the inactive dropdown menu to select the appropriate status.
- **VFC Status** – select the patient's VFC status from the dropdown box.

**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 to allow users to search by the alias name.
### Viewing a Patient’s Vaccinations

1) [Search for the patient](#) and select the correct patient from the list.

2) Using the Navigation Menu, click on the “Vaccinations” menu heading.

3) Click “View/Add”.

4) The Vaccination View/Add screen will appear where users can see the patient’s full vaccination history (if applicable).

This screen has three sections:
- **Patient**
- **Vaccination Forecast**:
  - Vaccine Family name displays if series not complete
  - Recommended Date is routine ACIP schedule
  - Minimum Valid Date is earliest vaccine could be given to be valid dose
  - Status is as of today and will be either Past Due, Due Now, or Not Yet Due

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• Vaccination View
  o * after date = historical vaccination
  o No * after date = administered vaccination
  o X in front of date = invalid vaccination

5) Click on vaccine date to display the Vaccination Details Screen.

Note: Organization and/or Facility fields show facility that entered either administered or historical vaccinations into TennIIS.

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Adding Administered Vaccinations

Note: Administered vaccinations are shots that were both administered at your facility and entered into TennIIS by someone at your facility. These vaccinations may only be modified or deleted by staff within your facility.

1) From the Vaccination View/Add Screen:

   Type the date in the field next to the appropriate vaccine name to enter the date the vaccine was given.

   Helpful tip: to enter vaccination dates quickly, double click in the “date field” to automatically enter today’s date as the default. To change the default date, enter the date you’d like as the default in the default date box on top of the vaccination date grid.

   Note the drop-down menu located at the bottom of the vaccination list which will contain additional vaccine selections. Once a vaccine is selected from the drop-down, a new line will appear for that vaccine in which the user can add dates.

2) Click “Add Administered” once all dates are entered.

3) A VFC Eligibility Update screen will open. Update the VFC eligibility of the patient at the time of this vaccine. Click “Continue”.

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4) The Vaccination Detail Add screen will open.

This screen allows you to view and edit information about the vaccination.

For privately purchased vaccines, you may manually enter “Provider Noted on Record”, “Lot Noted on Record”, Manufacturer Noted on Record.
For VFC vaccines, click “Click to Select” link to choose vaccine directly from TennIIS Inventory. “Manufacturer”, “Lot Number”, “Lot Facility”, “Funding Source”, will auto-populate once vaccine is selected.

Click “Save” when finished – TennIIS will go back to the Vaccination View/Add Screen.
Adding Historical Vaccinations

Note: Historical vaccinations are shots that were administered by providers outside of your facility. Historical vaccinations include those given out of state and country.

1) From the Vaccination View/Add Screen:

Type the date in the field next to the appropriate vaccine name to enter the date the vaccine was given (see red box).

Helpful tip: to enter vaccination dates quickly, double click in the date field to automatically enter today's date as the default. To change the default date, enter the date you’d like as the default in the Default Date box on top of the Vaccination Date grid (see red arrow).

Note: the drop-down menu located at the bottom of the vaccination list which will contain additional vaccine selections. Once a vaccine is selected from the drop-down, a new line will appear for that vaccine in which the user can add dates.

2) Click “Add Historicals” after all of the historical dates have been entered.

TennIIS will add the historical data and take you back to the Vaccination View/Add Screen.

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## Editing Vaccination Information

1) From the [Vaccination View/Add Screen](#) :

   Click on the date of the vaccination you want to edit. You will be taken to the Vaccination Detail page.

   Note: Administered vaccinations may only be modified or deleted by staff within the administering facility.

2) Click “Edit Record”.

3) Make the appropriate changes in the fields and click “Submit Changes.”

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### Deleting Vaccinations

1) From the [Vaccination View/Add Screen](#) :

   Click on the date of the vaccination you want to delete.

   Note: Dates must be individually deleted.

2) Click “Delete Record” on the Vaccination Detail page.

3) Click “Delete Record” on the confirmation page.

   Note: administered vaccinations can only be deleted by users in the administering facility.

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## Generating the official TN Certificate of Immunization

Note: The Tennessee Immunization Certificate is required for children in child care or pre-school, and when they enroll for the first time in a school located in Tennessee. In addition, all currently enrolled students entering 7th grade must provide a certificate showing they have had the vaccines required for 7th grade entry.

1) **Search for the patient** and select the correct patient from the list.

2) Using the Navigation Menu, click on the “Reports” menu heading.

3) **Click “State Reports”**.

4) **Click “IMMCert”** (this link is only available for patients less than 20 years old).

5) **Click the appropriate “radio button”** for certificate needed (options change depending upon patient/student age):

   - **Click “View Certificate”**.

   Note: Pre-Populated and Blank Certificate may be selected from this screen. **Both Pre-Populated Immunization Certificate without Validation Assessment and Blank Certificate require the signature of a qualified provider to be valid.**
| 6)  | **If immunization record in TennIIS MEETS requirements for certificate type**, Validation Result screen displays links for validated Official Certificate and Validation Report.  

Click link to produce a validated Official Certificate or a Validation Report for desired certificate type. |
|---|---|
| 7)  | **Validated Official Certificate** will have:  

- Certificate type box checked in Section 3. Provider Assessment  
- No signature is required; “Validated by the TN State Immunization Information System”  
- Invalid doses do not display |
8) **PASS Validation Report:**

- Displays pass status for certificate type
- Displays vaccine requirements with pass status
- If invalid dose in record, displays invalid vaccine dose and reason dose is invalid

9) **If Immunization record in TennIIS does not meet requirements for certificate type and patient/student is not as up-to-date as possible for required vaccines**

Validation Results screen displays links for Official Certificate that has not been validated and Validation Report.

Click link to produce Official Certificate that has not been validated or Validation Report for desired certificate type.

10) **FAIL Validation Report:**

- Displays fail status for certificate type
- Displays vaccine requirements with pass or fail status
- If invalid dose in record, displays invalid vaccine dose and reason dose is invalid

11) **If Immunization record in TennIIS does not meet requirements for certificate type, but student is as up-to-date as possible for required vaccines**

Validation Results screen displays links for Temporary Official Certificate and Validation Report.

Click link to produce Temporary Official Certificate or Validation Report for desired certificate type.

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12) **Temporary Official Certificate:**

- Temporary certificate box checked in Section 3. Provider Assessment with **expiration date**.

- No signature is required; “Validated by the TN State Immunization Information System”.

- Invalid doses do not display.
Changing Patient Status Between Active/Inactive

Note: Patients become active with a facility if that facility has created the patient or recorded an administered vaccine. Patient status can be used to limit certain reports that can be generated in TennIIS. For more information, please see the Quick Reference Guides for Running Reports located in the Documents Center of TennIIS. Patients can be manually activated or inactivated using the steps below.

1) **Search for the patient** and select the correct patient from the list.

2) Patient Status is highlighted in red on the Patient Demographic Master View. Click “Edit”.

3) Go to the line that says “Patient Status” and select the desired status (active if the patient should show up on your facility's reports, inactive if they are no longer associated with your facility, or deceased).

Please contact [TennIIS.Training@tn.gov](mailto:TennIIS.Training@tn.gov) or 844-206-9927 for questions about this quick reference guide.
4) Click “Save”.

Note: Patients marked as inactive can be reactivated as needed. If a patient’s record is incorrectly marked as deceased, please contact the TennIIS Help Desk at TennIIS.Help@tn.gov or 844-206-9927.
## Adding Vaccinator Name as Default

Note: Adding vaccinator name as default will expedite data entry by automatically populating the vaccinator name when adding an administered vaccine to a patient's record.

1) Using the Navigation Menu, click on the “Settings” menu heading.

2) Click “Personal.”

3) Next to “Vaccination Defaults”, click the “+” to open the tab.

4) Click “Update”.

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5) Choose the vaccinator’s name and facility from the dropdown list and click “Save”.

Note: You can always override any default when adding an administered vaccine. Personal settings follow each user account. Each user must set up his/her unique personal settings.

Organization points of contact are responsible for setting up physician/vaccinators in TennIIS.
### Adding Route and Site as Default

Note: When adding an administered vaccine to a patient’s record, you can set up Anatomical Injection Site Default for each vaccine you normally give in the same anatomical site. You can even specify the site by the patient’s age.

1) Open “Personal Settings” (see steps in Adding Vaccinator Name as Default section).

2) Next to “Anatomical Injection Site Defaults”, click the “+” to open the tab.

3) Choose the Vaccine Description, Anatomical Route, and Anatomical Injection Site from the dropdown menus.

   Note: If you would like to set the default by age range, type the age range. Otherwise select the “All Ages” radio button. If you create the default by a specific age range you must repeat the above step for each possible age range.

   Once you have made your selection, click the “Add” button to save your changes. Repeat these steps for each vaccine type.

   Note: You can always override any default when adding an administered vaccine. Personal settings follow each user account. Each user must set up his/her unique personal settings.

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## Adding Vaccination Volume as Default

1) Open “Personal Settings” (see steps in Adding Vaccinator Name as Default section).

2) Next to “Vaccine Default Volume”, click the “+” to open the tab.

3) Select the appropriate “Vaccine” from the dropdown list.

   Type in the “Dosage Default” in the space provided. Only type a number – TennIIS will automatically add the mL/cc unit.

4) Once you have made your selection, click the “Add” button to save your changes. Repeat these steps for each vaccine type.

   Note: You can always override any default when adding an administered vaccine. Personal settings follow each user account. Each user must set up his/her unique personal settings.

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