# Managing Patient Ownership and Status

## Why Should I Manage Patient Ownership and Status?

Managing patient ownership and status improves the accuracy of reports run from the Washington State Immunization Information System (IIS) to measure immunization rates or send reminders about due or overdue immunizations.

## Who can own a Patient in the IIS?

Most organizations and facilities who administer vaccines can own patients in the IIS. Some exceptions include schools, child care centers, pharmacies, and mobile/mass immunization providers. The ability to own patients in the IIS depends on how an organization and facility are set up in the system.

> **TIP:** Ownership can be blocked at the organization and facility level. If an organization or facility has ownership blocked, they can't take ownership of any patient records in the IIS.

## What is Patient Ownership?

Patient ownership means a patient is tied to your organization and facility in the IIS:

> **TIP:** Only one facility can own a patient's IIS record at a time.

- A facility automatically "owns" a patient in the IIS if they administered the most recent vaccine or made the most recent edits to patient demographic information.
- A facility also owns a patient if they created a new record for that patient in the IIS.
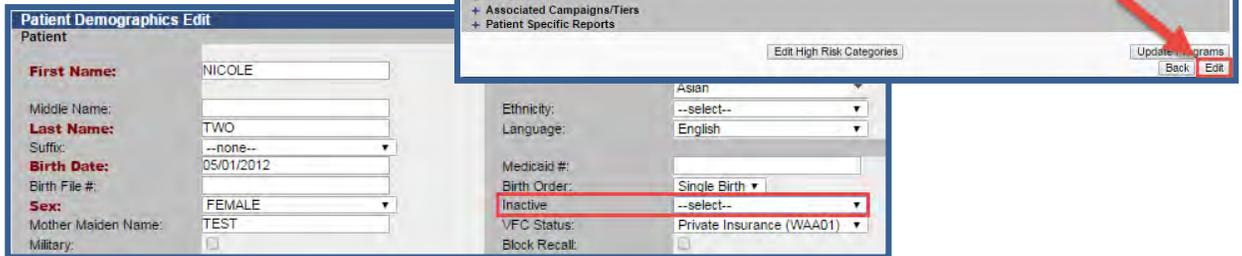
## What is Patient Status?

- Patient status determines whether a patient is "active" or "inactive" with a facility.
- Patients automatically display as "active" if a facility:
  - Creates a new patient record.
  - Administers a vaccine, adds historical vaccines, or updates an existing patient's demographic information.
- Organizations and facilities can inactivate patients in the IIS to show that the patient changed to another provider, moved, is deceased, or other reasons. Facilities need to routinely inactivate patients in the IIS in order to have accurate reports (e.g. reminder/recall).

> **TIP:** Inactivating a patient does not change the organization owner on the **Patient Demographics** screen. It removes the patient from showing up on reports (e.g. coverage rate report, reminder/recall) when they are run for "active patients only."

For people with disabilities, this document is available on request in other formats. To submit a request, please call 1-800-525-0127 (TDD/TTY call 711).

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## How Can I Inactivate a Patient?

1. Search for the patient in the IIS.
2. Select the patient from the **Search Results**.
3. Click the **Edit** button on the **Patient Demographics** screen.
4. In the **Inactive** drop down box, select a reason for inactivation (e.g. deceased, moved out of state). After selecting an inactivation reason, click **Save** on the bottom right of the screen.





5. After saving the change, you can view the updated **Inactive Status** on the **Patient Demographics** screen.



## How Can I Reactivate a Patient?

1. Follow Steps 1-3 in the above section to get to the **Patient Demographics Edit** screen.
2. Select **Active** as the patient status in the **Inactive** drop down box and click the **Save** button.
3. After saving this change, the **Inactive** field on the **Patient Demographics** screen will be blank. This means the patient is active with the facility and will show up on their reports.
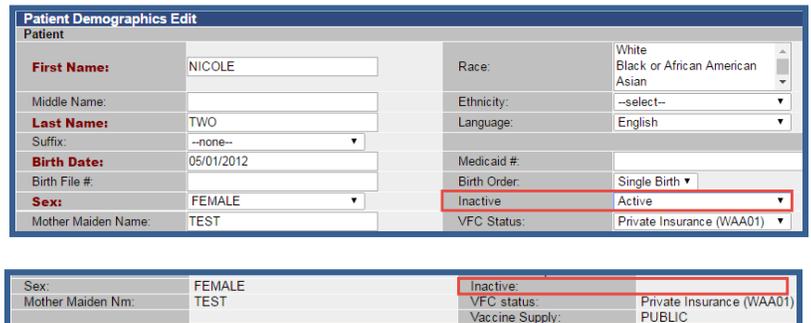


**TIP:** Patients marked as inactive can be reactivated for any reason except deceased. Please contact the IIS Help Desk if you find a patient's record that is incorrectly marked as deceased.

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## How Can I Change a Patient's Ownership?

Most facilities automatically take ownership of patients when documenting a vaccine through manual data entry, editing patient demographics, or sending an HL7 message from an EHR to the IIS, unless:

- The organization or facility has automatic ownership blocked in the IIS.
- The organization or facility checks the "Do not take ownership of this record" box when entering a new patient record or editing an existing patient record in the IIS.

**TIP:** Check the box at the bottom of the **Patient Demographics Edit** screen or the **Vaccination View/Add** screen if you don't want to take ownership when updating demographics or entering vaccinations.

**Patient Demographics Edit Screen**

☐ Do not take ownership of this record.
Cancel   Save

**Vaccination View/Add Screen**

☐ Do not take ownership when adding vaccinations.
Add Administered

### To Manually Change Ownership of a Patient to a Different Facility under the Same Organization:

1. You need an **Organization Client** user account. This type of account allows you to see all facilities associated with an organization in the IIS.

2. On the **Patient Demographics Edit** screen, click the **+** symbol next to **Medical Home Facility** to expand that section.

   + **Alias**
   + **Secondary Patient Demographics**
   + **School**
   + **Medical Home Facility**
   + **Birth & Death**

3. Choose a facility from the **Facility** drop down box and click the **Save** button.

| − Medical Home Facility | | | |
|---|---|---|---|
| Physician: | TEST, NICOLE ▼ | Facility: | NICOLE'S CLINIC ▼ |
| Admission Date: | | District/Region: | |
| Next Appt. Date: | | Chart Number: | |
| Medicaid Provider #: | | | |
| + Birth & Death | | | Cancel   Save |

4. After saving this change, the new owning facility will be listed in the **Medical Home Facility** section of the **Patient Demographics** screen.

| − Medical Home Facility | | | |
|---|---|---|---|
| Physician: | TEST, NICOLE | Facility: | NICOLE'S CLINIC 1 |
| Admission Date: | | District/Region: | |

**Questions?** Contact the IIS Help Desk at 1-800-325-5599 or WAIISHelpDesk@doh.wa.gov