

# HDIS

Health Department Information System

*Helping You...Help Others*

**Health Services**

**User Manual**



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## Chapter 1: Getting Started

Health Services is a product resulting from the evolution in HDIS of the Immunization module to manage details for clinical services in addition to vaccinations.

The following is the terminology of equivalent details for Health Services data:

Vaccinations	Disease	Vaccine
Clinical Services	Service	Activity

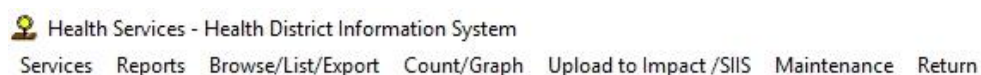
As the data details will predominantly pertain to vaccinations, the discussion in this document will apply to vaccinations.

The Health Services module is where the user maintains demographic details of patients and enters details of vaccinations and clinical services which have been provided to the clients, generate reports, and other procedures pertaining to vaccinations and clinical services.

The menu selection for the Health Services module is located under the Community and Public Health Services menu, as shown below:



Upon selecting the Community & Public Health (CPH) -> Health Services menu option, the menu for the Health Services module will display as shown below.



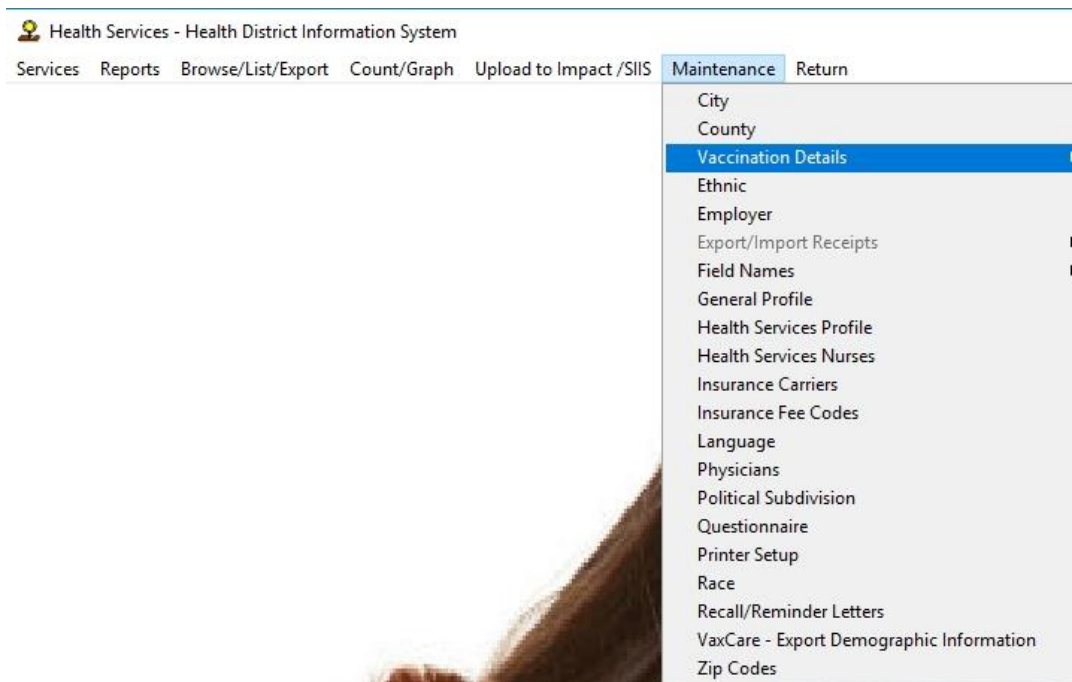
The menu options are:

Menu Option	Function
Health Services	Main screen for managing details of patients and entering / viewing history of vaccination activities for patients.
Reports	Generate reports and processing of data entered in Health Services.
Browse/List/Export	Extract details from Health Services data files
Count/Graph	Generate tallies about Health Services data
Upload to Impact/SIIS	Extract details of vaccination activity to be uploaded into the ImpactSiis system of ODH
Maintenance	Menu to manage details specified in Health Services screen and other processes performed on health services data.
Return	Exit the Health Services module and return to main screen of HDIS.

## Setting Up Health Services Data Details

Upon installation of the Health Services module in HDIS, many supporting details pertaining to Health Services need to be defined. These details include Diseases, Vaccines, Vaccine Inventory, and more.

Setting up and maintaining these details are performed in the Vaccination Details Maintenance screens found under the Health Services Maintenance menu shown below:



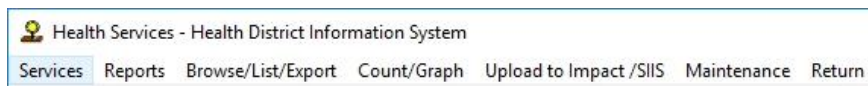
### *Health Services -> Maintenance Menu*

See the [\*\*Health Services Vaccination Maintenance User Manual\*\*](#) for detailed discussion on setting up and maintaining these details

Upon completion of setting up the data details in the **Vaccination Details** maintenance screens, you are ready to use **Health Services**.

## Chapter 2: The Health Services Screen

The Health Services screen is reached by selecting the Services option from the Health Services menu as shown below.



Upon selection of the Services menu option, the screen for viewing and editing details of clients, Health Services activity, and generating statements is displayed,

Last	First	Middle	Suffix	Dob	Sex	Ssn	Race
ABBOTT	CAMERON (CARL)			09/27/1985	F	000-26-0462	WHITE
ABBOTT	CAMERON	A.		02/17/1992	F	000-26-0462	WHITE
ABBOTT	CAMERON	H		08/25/1944	F	000-28-0462	
ABBOTT	CAMERON	J		07/11/1934	F	000-27-0462	WHITE
ABBOTT	CAMERON	J		08/06/2013	M	000-27-0462	CAUCASIAN
ABBOTT	CAMERON	K		12/22/2011	M	000-28-0462	CAUCASIAN
ABBOTT	DABNEY			06/06/2008	M		
ABBOTT	JESSE			09/17/2008	F	000-27-0462	CAUCASIAN
ABBOTT	JESSE			07/22/2003	M	000-28-0462	
ABBOTT	JESSE	B		01/25/1948	F	000-27-0462	UNKNOWN
ABBOTT	JESSE	D		11/22/1962	M	000-27-0462	
ABBOTT	JESSE	D		12/08/2000	F	000-28-0462	
ABBOTT	JESSE	E		08/24/1997	F	000-26-0462	UNKNOWN
ABBOTT	JESSE	R		/ /	F	000-26-0462	WHITE
ABBOTT	RYAN			12/25/1969	F	000-27-0462	
ABBOTT	RYAN			11/21/1997	M	000-28-0462	
ABBOTT	RYAN	D		08/04/2000	M	000-27-0462	WHITE
ABBOTT	RYAN	E		03/08/1990	F	000-27-0462	WHITE
ABBOTT	RYAN	G		03/01/1996	M	000-26-0462	WHITE

### Health Services screen

Upon entry to the Health Services screen, you will be on the page where you can search for the client for which you want to manage details for.



## Find Page

Functions provided in the Find page are:

Search	Find client of interest by Name, Medical Record # (i.e. MRI) or Date of Birth
Add Name	To add new client to the system.
Defaults	Editing specification of default selection values on Health Services page. Discussed in detail on page 53
Close	Exit screen and return to main Health Services page.

## Searching clients to manage data details

Prior to editing details for a client, you will need to search for that client. The searching can be done based on any of the following values:

Name	Name of patient/client
	Searching by Name is discussed below
Medical Record #	ID # assigned to patient/client
	This value is displayed in the title of the screen when viewing/editing details in one of the other pages of this screen
DOB	Date of Birth

## Searching by Name of Client

The success in searching for a client by their name is greatly influenced by how the name is entered when the client is added to HDIS and the number of characters entered which to search on.

The more characters entered which to search by, the more accurate the system will be in finding the desired client or ending up close to the client.

Entry of client name which to search for is to be in the following format:

<last name>,<first name><middle>

**As these details have leading and trailing blanks trimmed for the purpose of sorting the data, do not include spaces unless they are within a component of the name, such as 'Mary Jane'.**

If the initial search for a client with last and first name specified fails and having verified that there is no typo in the name entered, consider trying to search by variations of how the name could have been entered. If those all fail, then try searching by DOB.

Variations to use in searching for clients

Using the example of *'Mary Jane'*, variations could include:

First name entries of **Mary Jane; Maryjane; Mary Jane** (two spaces)

First name as **Mary**, middle name **Jane**.

When searching assuming *'Mary Jane'* entered entirely in the first name field fails, try searching for case of Mary and Jane components entered separately.

Since the trailing blanks are trimmed in the expressions used to index the search, the <first name><middle> search value will need to be entered as *'MaryJane'*, with no spaces.

**Nuances about entry of names are discussed, beginning on page 10, in the section pertaining to Adding clients.**

Upon successful search and selecting the client of interest, you can select the page to view desired data details pertaining to the selected client.

Upon selecting one of the pages, that page will be displayed in a View / Browse mode. To edit any of the details for the client, the user must first click the Modify button located in the lower right corner of the screen. Upon doing so, the screen will be in Edit mode and function accordingly.

Anytime the application returns to the Find page, it will reset to View / Browse mode per selection of the next client.

If a client does not match the search name entered, the system will find the client with the name closest to the name searched for. The result for the search for a client named Matthew Brown, in which the search value of *'Brown,Mat'* is entered, is shown on the next page.

Health Services - 23

Find Demo Information Health Services Statements

☒ by Name ☐ by Medical Record # ☐ by Date of Birth

Enter Name (last, first middle name) or Medical Record # or Date of Birth

**BROWN,MAT**

Add Name Defaults Close

Last	First	Middle	Suffix	Dob	Sex	Ssn	Race
BROWN	ALEX	P	DC	08/26/1991	M	000-26-0004	WHITE
BROWN	ELLIOTT			05/24/1990	F	000-26-0004	UNKNOWN
BROWN	ELLIOTT			04/06/1986		000-26-0004	UNKNOWN
BROWN	ELLIOTT			04/29/1956	M	000-27-0004	CAUCASIAN
BROWN	ELLIOTT			08/18/1978	M	000-28-0004	
BROWN	ELLIOTT	M		09/29/1927	M	000-27-0004	UNKNOWN
BROWN	ELLIOTT	P		05/13/2009	M	000-27-0004	
BROWN	ELLIOTT	T		07/13/1981	F	000-28-0004	
BROWN	JOHN	A		05/04/2010	F	000-27-0462	
BROWN	MONROE			09/07/2005	F	000-27-0004	ARABIC
BROWN	MONROE			03/05/2012	M	000-28-0004	
BROWN	MONROE	E		04/14/1975	M	000-26-0004	UNKNOWN
BROWN	MONROE	F		05/17/1941	F	000-27-0004	UNKNOWN
BROWN	MONROE	J		06/20/1972	M	000-27-0004	
BROWN	MONROE	J.C.		01/21/2016	M	000-28-0004	CAUCASIAN
BROWN	MONROE	S		12/27/1987	M	000-26-0004	WHITE
BROWNING	AINSLEY			07/06/1988	F	000-26-0683	WHITE
BROWNING	AINSLEY			01/27/2005	M	000-26-0683	UNKNOWN
BROWNING	AINSLEY	A		01/13/2008	F	000-28-0683	

*Result of search for 'Brown,Mat'*

As you can see, no client with the last name of Brown and first name beginning with 'Mat' exists yet in HDIS.

The new client can be added by clicking the **Add** button located above the list on the right side of the screen.

## Adding new clients into HDIS

Upon entry to the Add client screen, the demographics details will be displayed with all details empty except the name components entered for the search, if any.

In this example, clicking to Add the client after the search for the name “BROWN,MAT” fails, the screen will appear as follows:

You can see that the client name components have been filled in with “BROWN” as the last name and “MAT” for the first name. The user will need to enter the remaining portion of the first name.

**NOTE:** Although not enforced at the time of creating new client, entry of Date of Birth value is required by processes which transfer data to third parties, including Upload to ImpactSiis.

Upon entering all details for the new client, click the OK button in the bottom right of the screen. It is at this time that the client will be created and added into the data details of HDIS.

Upon return from the **Add** client details screen, the Health Services screen will appear displaying the Information page for the newly added client, as shown below.

Editing of details in the Information page is discussed beginning on page 23

Clicking the **Cancel** button will return to the Find page without adding the client, as though the user never clicked the Add button.

Health Services - BROWN, MATTHEW - 04/01/2019 - 10M / 44 Weeks - M.R.#: 36631 - Status:

Find Demo Information Health Services Statements

ID# Home Clinic Site VFC Eligibility VFC Date Code

☐ Had Chicken Pox Year & Month Chicken Pox Source

General Notes Medical Notes Last Reminder/Recall Last Updated

☐ 1st Recall Attempt ☐ 2nd Recall Attempt ☐ 3rd Recall Attempt

Information Birth Information / Alias

Consent for Services and Release of Information

☐ WIC ☐ Schools ☐ SIIS

☐ Physician(s) ☐ Day Care Centers ☐ Health Departments

☐ Third Party Payor

Signature of Parent

☐ Client ☐ Parent ☐ Guardian ☐ Other

Signature Date

Defaults Print Delete Immunization Record Add Immunization Record Modify

### *Health Services Return from Add Client*

#### **Copy Previous Address Information**

When a new client detail being added is saved, the address details are saved in memory, per the case of entering multiple members of a family residing at the same address. As each additional client is entered, the address details can be filled in automatically with the details from the previous client.

This is accomplished by clicking the button located in the lower left corner of the Add Client Demographic Information screen, with the label of **Copy Previous Address Information**. The presence of an asterisk next to the caption indicates the requirement that the user presses the right mouse button.

## Entry of Names for new Clients

The components for a client's names are entered and stored separately in the data details of HDIS.

The index definition used for a name search strips the spaces at beginning and end of the name components and concatenates what remains into a value of "SMITH,JOHNA" for the name of John A Smith. Any suffix entry is not included. All letters are capitalized in the index definition to prevent issues due to use of mixed-case (both Upper and Lower cases).

How the components of a client's name are entered can lead to unexpected results in how the system performs when accessing client details.

Below are examples of how entry of client names impacts performance

Inclusion of suffix      Entry of suffix (i.e. JR, II, etc.) with Last Name field rather than the separate field for suffix specification.

Inclusion of suffix with last name resulting in "SMITH JR,JOHNA" as the index definition will cause search for "SMITH,JOHN" to fail.

More than three name components      Suppose upon marriage, the wife decides to retain use of her maiden name, hyphenating it with the husband's surname. This would lead to a name like "Mary Jane Davis-Smith", as compared to an entry of "Mary Jane Davis Smith" (Davis being genuine middle name)

<u>First</u>	<u>Middle</u>	<u>Last</u>	<u>Index Definition</u>
Mary	Jane	Davis-Smith	DAVIS-SMITH,MARYJANE
Mary Jane	Davis	Smith	SMITH,MARY JANEDAVIS
Mary	Jane	Davis Smith	DAVIS SMITH,MARYJANE
Mary Jane		Davis Smith	DAVIS SMITH,MARY JANE

(continued on next page)

Multiple components  
incorrectly entered

Entering a two part name separately in First and Middle fields rather than only in First name field, and vice-versa

For the name Mary Jane with middle initial B, the following entry in First and Middle name fields will result in the specified index definition, as the space in the middle of the text will be retained.

<u>First</u>	<u>Middle</u>	<u>Index Definition</u>
Mary	Jane B	MARYJANE B
Mary Jane	B	MARY JANEB

Thus a search for first name specification of 'Mary Jane' will fail on the first item, succeed for the second item.

Inclusion of nickname

Including entry of nickname in parenthesis in first name field. This can also apply when specifying an American name for a person of ethnic origin.

Suppose John Smith noted above goes by the nickname of Jack. When John Smith is added to the client data he is entered with the legal first name of John specified with nickname added in parenthesis (Jack).

The index definition will be "SMITH,JOHN (JACK)"

A search for **Smith,Jack** (using the nickname) will fail; a search for **Smith,John** may fail to find the desired client directly, instead finding another client entered in HDIS named John Smith.

Inclusion/Exclusion of  
period for  
abbreviation

Suppose that instead of entering Mary Jane by full name, she gets entered using only the initials MJ.

Entering the initials in the First name fields as 'MJ' vs 'M.J.' vs 'M J' will lead to different results.

### **Branching to other Modules in HDIS**

HDIS provides the ability for user to branch to the screen display located in another module of HDIS without having to exit the Health Services module, navigate to the other module, and then return to the Health Services module.

This is achieved with the use of Hot-Keys. To branch to a different module, press the Hot-Key specified below:

Module	Hot-Key	Purpose
Appointment Books	Alt+A	To book appointment date/time for client
Receipts	Alt+R	To enter details of payment by client
Labels	Alt+L	
Associations	Alt+N	To enter notes, save files, etc. pertaining to the client

**The functionality of the Hot-Keys is available only when viewing details in pages other than the Find page.**

Except for Associations, upon branching to the desired module, the Health Services screen display will become invisible and the screen display of the desired module will be visible. Upon return to the Health Services screen, the display of the desired module is closed and the Health Services screen is made visible.

**Discussions for entering details in the other modules of HDIS can be found in user manual documents pertaining to that module.**



## Patient Demographics Details

The **Demo** page is where the demographic details about the client are displayed and maintained after the client has been added to the system.

This page enables maintaining details including Name, Address, DOB, Parent info (per children/adolescents), Insurance coverage, and more.

Upon selection of the Demo tab, the main demographics page with details pertaining to the selected client is displayed, as shown below.

Health Services - BROWN, JOHN A - 05/04/2010 - 9 - M.R.#: 28462 - Status: NOT CURRENT - \*\*\*CHECK NOTES\*\*\*

Find Demo Information Health Services Statements

Patient Name and Address Parents / Emergency Contact Insurance / HIPAA Other Info

Last Name: BROWN First Name: JOHN Middle Name: A Suffix:

Date of Birth: 05/04/2010 Age as of Today: 9 Sex: F Race: Social Security #: 000-27-0462

Street #: 14245 Street: NORTH Street Suffix: LN Apt. #:

City: GOTHAM CITY State: OH Zip Code: County:

Political Subdivision: 001 GOTHAM CITY Phone: 1-555-555-5555 Referred By:

Client Email:

Primary Care Physician: OYSTER MD, PEARL Alerts: 12341234

☐ WIC client

PDF Documents Previous Patient Next Patient Delete Patient Record Modify

*Patient Name and Address details page.*

Although not enforced by HDIS, entry of Date of Birth value is required by processes which transfer data to third parties, including Upload to ImpactSiis.

Functions available in the **Demo** page are:

Function	Description
PDF Documents	Opening of PDF document file to view/print. These documents will have been created in a manner outside of HDIS, such as scanning, printing/saving to PDF file, etc.
Previous Patient Next Patient	Advance to the previous or next client in the list displayed on the Find page.
Delete Patient Record	Deletes the patient from the HDIS system.  Before the deletion is performed, data files in all CPH modules which reference the client details are checked to verify that no activity exists before permitting the client to be deleted.
Modify	Shift from Browse / View mode to Edit mode.  Once in edit mode, the screen will remain in edit mode, on all pages, for the client until returning to the Find page or clicking the Previous/Next patient buttons.

Detail Pages in the **Demo** page include:

Page	Description
Patient Name and Address	Maintain details pertaining to the client himself (shown on previous page)
Parents / Emergency Contact	Per children/adolescents, details of parents of client and emergency contact in case a parent or the adult client can't be reached.
Insurance / Hipaa	Details of insurance coverage for the client
Other Info	Additional info which does not fit in above categories

The **Parents / Emergency Contact** page is where details of the parents are entered. In the case that details of a parent is not available, then details of legal guardian can be entered.

Additionally, in the case that the parent / guardian can't be contacted, details for another contact in case of extreme emergency are also entered in this screen.

Health Services - BROWN, JOHN A - 05/04/2010 - 9 - M.R.#: 28462 - Status: NOT CURRENT - \*\*\*CHECK NOTES\*\*\*

Find Demo Information Health Services Statements

Patient Name and Address Parents / Emergency Contact Insurance / HIPAA Other Info

Mother/Guardian Last: BROWN Mother/Guardian First: JANE Mother/Guardian Middle: Mother/Guardian Maiden: Mother/Guardian Date of Birth: // Mother/Guardian SSN#: 000-01-2738 Mother/Guardian Ethnic: Mother/Guardian Work Phone: 1-555-555-5555

Father Last Name: BROWN Father First Name: CHARLES Father Middle Name: Father Date of Birth: // Father SSN#: 000-21-2765

Emergency Contact: Emergency Contact Relationship: Emergency Contact Phone #: - - -

Emergency Contact Street: Emergency Contact City: E.C. State: E.C. Zip Code:

Emergency Contact Email:

PDF Documents Previous Patient Next Patient Delete Patient Record Modify

*Parents / Emergency Contact Page*

The **Insurance / HIPAA** page is where the insurance coverage details for the patient are entered. These details include the name/address of the insurance carrier, the group # of the insurance plan they are covered by, the Member # (Insurance #) of the client.

Health Services - BROWN, JOHN A - 05/04/2010 - 9 - M.R.#: 28462 - Status: NOT CURRENT - \*\*\*CHECK NOTES\*\*\*

Find Demo Information Health Services Statements

Patient Name and Address Parents / Emergency Contact Insurance / HIPAA Other Info

Primary Secondary Tertiary HIPAA

Primary Insurance Carrier: BALDWIN Insurance #: ABC28462 Group #: GRP-1234-28462

Address of Insurance Company: 7550 LUCERNE DR. CLEVELAND, OH 44130

Switch Primary with Secondary Switch Primary with Tertiary

6. Patient Relationship to Insured: ☐ Self ☐ Spouse ☒ Child ☐ Other

8. Patient Status: ☐ Single ☒ Married ☐ Other ☐ Employed ☐ Part-time Student ☐ Full-time Student

**Primary Insurance Subscriber Information**

Name: JANE BROWN Address: 14245 NORTH LN Copy Address \*

City: GOTHAM CITY State: OH Zip Code: 9999 Date of Birth: / / Sex:

Employer: Add Employer Name Social Security #: - -

PDF Documents Previous Patient Next Patient Delete Patient Record Modify

### *Insurance / HIPAA page*

#### Insurance Subscriber Details

Per the case that the client is on the insurance plan of someone else (parent, spouse, etc.), the details of that person whom the insurance coverage is registered to are entered in the Insurance Subscriber Information details in the bottom half of the screen. In the case of John Brown, he is under the coverage of the mother's health insurance.

The pages labeled as **Secondary** and **Tertiary** allow for entering information for additional insurance carriers which the client is covered by.

When claims are not covered in full by the primary insurance carrier, the balance of the claim can be submitted to the secondary, and if necessary, the tertiary carrier for the balance of the charges.

The **HIPAA** page under Insurance / HIPAA is where users can enter details about the HIPPA Privacy form being presented to the client or the Parent/Guardian of an adolescent.

The screenshot shows the HDIS Health Services interface for patient BROWN, JOHN A. The top navigation bar includes tabs for Find, Demo, Information, Health Services, and Statements. The main content area is divided into sections: Patient Name and Address, Parents / Emergency Contact, Insurance / HIPAA, and Other Info. The Insurance / HIPAA section is active, showing a form for the HIPAA notice. The form includes a date field (07/09/2012), checkboxes for Client, Parent (checked), and Custodian, and a text field for Other. Below this is the Authorization for Release of Information section, which includes checkboxes for Physician(s), Health Departments, Family, Day Care/Schools, WIC, and SIIS. A Date Modified field is also present. At the bottom of the form, there are buttons for PDF Documents, Previous Patient, Next Patient, Delete Patient Record, and Modify.

*HIPAA page under the Insurance / HIPAA page.*

The **Other Info** page is where information about the financial state of the family is entered.

### *Other Info Page*

Notes per details in the Other Info page

**Alternate Mailing Address** Address for mailing to Parent/Guardian when address is different than the client, per the client being 18 years of age or less.

**Household Info** Details of financial situation at client's household.

**Sliding Fee** Specification of which fee scale entry, if any, to determine amount charged when entering details for Client Statements

The sliding fee specification will default to a value of 'A' for full charge.

The proper sliding fee designation is calculated using the household details entered by clicking the **Calc Sliding Fee** button.

The details for the Sliding Fees are entered in the Insurance Billing -> Maintenance menu.

## Associations for Health Services

\* The Associations function is included in HDIS, but requires separate installation / setup. If not already installed, contact BGI to schedule a time to install / setup Associations.

The Associations feature of HDIS provides the user the following:

- A way to enter notes in documenting events for the client
- Loading / Saving files of medical documents scanned.

Examples of such documents are Medical Insurance cards, signed consent forms, vaccination history sheets and more.

The associations screen is reached by pressing the ALT+N hot key.

The scope of association details displayed in the Associations screen is determined by the following:

1. The screen in HDIS you are on when the ALT+N key is pressed.
2. Whether or not there is an Associations definition pertaining to that screen.

In Health Services, you can create Associations details for the following:

Client Details	These would pertain to non-vaccination contents such as the storing of Insurance Cards, per the insurance details entered in the Demo -> Insurance/Hippa section  Association details entered on the client details can be accessed from the Client Details screen in any module using the centralized Client Details data.
Immunization Detail	These would pertain to medical contents such as release forms with signatures, vaccination history sheets, etc.
Services Details	Note pertaining to the vaccination service for the vaccination detail selected when the ALT+N key is pressed.

The following pages show the Associations screen branched from the three locations, showing only the entries specific for that location.

The process for Adding / Editing Association details is discussed in detail in the **HDIS Associations** user manual.

Associations for Comm & Pub Hlth, Client Details - BROWN

**Associations for this Item**

Date Created	Type	Publish	Note	Has a File
2/13/20 11:52 AM	Demo	<input type="checkbox"/>	This is a sample entry of note for Jo...	<input type="checkbox"/>

**Note**

File Name   
  

Select File

View File

Delete File

☐ Publish To Web

Save

New Note

*Associations Screen from Client Details*



Associations for Comm & Pub Hlth, Client Details - BROWN : Health Services Immunization Record - \*\*

**Associations for this Item**

Date Created	Type	Publish	Note	Has a File
2/13/20 11:49 AM	Information	<input type="checkbox"/>		<input checked="" type="checkbox"/>

**Note**

File Name   
  

Select File

View File

Delete File

☐ Publish To Web

Save

New Note

*Associations Screen from Immunizations page*

Associations for Comm & Pub Hlth, Client Details - BROWN : Health Services History - 07/09/2012

### Associations for this Item

Date Created	Type	Publish	Note	Has a File
2/13/20 12:00 PM	Health Services	<input type="checkbox"/>	Sample note for vaccination servic...	<input type="checkbox"/>

**Note**

**File Name**

Select File
View File
Delete File

☐ Publish To Web

Save
New Note

*Associations Screen from Health Services page*

## Information Page

The information page is for maintaining details pertaining to the client's classification in the Vaccines for Children program (if apply), documenting signature and details of consent and release of informat, along with other general information.

Details displayed in the Birth Information / Alias page :

Details of importance include:

Field	Note
Home Clinic Site	Clinic site, if any, designated as primary location where the client will receive services
VFC Eligibility & VFC Date	Details pertaining to a client's qualification for the Vaccines for Children program. Select the appropriate Eligibility status and enter the date which they qualified for the VFC program.
Code	Code per VFC Status
Exclude from Impact Upload	Specify that details about the client are to be excluded from being extracted and sent to ImpactSiis.
Responsible for Patient	Indicate whether or not your health department is the primary provider of medical services for the client. Updating this detail is discussed below.
General & Medical Notes	Entry of notes / comments about the client and/or their medical information not provided in the Health Services screen.

#### Deletion of Immunization Record

When user clicks the **Delete Immunization Record** button, and confirms the deletion, all details of vaccinations entered/displayed in the Health Services page are deleted in addition to the immunization record details on the Information page.

## Patient Responsibility

The Patient Responsibility specification has the function of providing to ImpactSiis which clients the health department is responsible for as the primary provider of health services, per clients not having a Primary Care Physician.

A checkbox has been provided enabling users to specify whether or not the health department is responsible in providing vaccinations for the patient.

The display showing status of responsibility will be one of the following:

Responsibility  
Unspecified

☐ Responsible  
for Patient

Responsibility of Patient is unspecified / unknown.

Patient is newly added in HDIS, or already exist in HDIS when the responsibility designation was added to HDIS.

Responsibility  
Active

☒ Responsible  
for Patient  
Since 06/10/2017

Health Department assumed responsibility for patient on June 10, 2017.

Responsibility  
Relinquished

☐ Responsible  
for Patient  
Since 09/30/2015

Health Department relinquished responsibility for patient on September 30, 2015

### Updating Patient Responsibility designation

When a new patient/client is added to HDIS, the responsibility designation will initially be **Responsibility Unspecified**.

Updating the **Patient Responsibility** specification in HDIS is based on the following guidelines:

Current Responsibility Status	Next Vaccination Entry	Patient Responsibility Updated
Unspecified	Non-Flu	Prompt user about taking responsibility (Yes/No) and update Responsibility setting accordingly with effective date specified as date of vaccination.
	Flu	Set as Relinquished Responsibility with effective date specified as date of flu vaccination
<b>Once responsibility is updated from Unspecified, the guidelines described below will apply.</b>		
Active	Any vaccine	Responsibility remains Active until a user unchecks to relinquish Responsibility
Relinquished	Any vaccine	Responsibility remains Relinquished until a user checks to assume Responsibility

When a client with current responsibility status of Unspecified receives both a flu and non-Flu vaccination at the same time and you want to assume responsibility, enter the non-Flu vaccination first. Thereafter, the behavior will fall under the Active status.

Entry of historical vaccination details or editing of an existing vaccination detail record won't affect the Patient Responsibility specification.

Updating the responsibility designation is done as follows:

1. Search and bring up detail screen for patient.
2. Navigate to the Information Page.
3. Click the Modify button to edit the patient record.
4. Click the mouse on the checkbox labeled Responsibility of Patient.

Clicking the checkbox, the responsibility designation will toggle between responsible and not responsible designation.

A message box verifying the change in responsibility designation will be displayed.

Upon confirming the change in responsibility designation, the effective date of the change in responsibility designation will be updated with the current date.

Upon denying confirmation for the change in responsibility, the designation will revert back to original setting prior to clicking the checkbox.

The current status for the responsibility designation will be specified in all data extractions to ImpactSiis which provide details of vaccinations for the patient.

**Contact ImpactSiis if you have any questions or need additional information about Patient Responsibility.**

## Health Services Page

The Health Services page provides for managing the history of vaccination activities and clinical services/activities for the patient.

Upon entry to the Health Services page, the history of details for the current client are extracted and details for vaccination(s) that have been administered, when they were administered, and other pertinent details are displayed in the list in the top portion of the screen. The client's name, DOB, and HDIS Medical Record # are displayed in the title.

Health Services - BROWN, JOHN A - 05/04/2010 - 9 - M.R.#: 28462 - Status: NOT CURRENT - \*\*\*CHECK NOTES\*\*\*

Disease	Date	Vaccine	Dose	Age	Lot #	Clinic Site
DTAP	07/21/2010	DTaP-Hib-IPV	1	2M	UNKNOWN	
DTAP	07/09/2012	DTaP-Hib-IPV	2	26M	MC4059AA-C3928	HORRID COMMUNITY CENTER
DTAP	08/13/2012	DTaP-Hib-IPV	3	27M	MC4195AA-C3973	HORRID COMMUNITY CENTER
DTAP	03/10/2014	DTaP	4	3	MC4454BA	HORRID COMMUNITY CENTER
DTAP	04/10/2017	DTaP-IPV	5	6	M43HB3	HORRID COMMUNITY CENTER
HIB	07/21/2010	DTaP-Hib-IPV	1	2M	UNKNOWN	
HIB	07/09/2012	DTaP-Hib-IPV	2	26M	MC4059AA-C3928	HORRID COMMUNITY CENTER
HIB	08/13/2012	DTaP-Hib-IPV	3	27M	MC4195AA-C3973	HORRID COMMUNITY CENTER
HEPA	08/13/2012	HepA	1	27M	MAHAVB523AA	HORRID COMMUNITY CENTER
HEPA	03/10/2014	HepA	2	3	M55RX2	HORRID COMMUNITY CENTER
HEPB	07/21/2010	HepB	1	2M	UNKNOWN	
HEPB	07/09/2012	HepB	2	26M	M1260AA	HORRID COMMUNITY CENTER
HEPB	01/14/2013	HepB	3	32M	MH011183	HORRID COMMUNITY CENTER
MMR	07/09/2012	MMR	1	26M	M1023AA	HORRID COMMUNITY CENTER

Defaults Enter History Forecast Add Edit Delete VIS Forms Print Modify

Date	Disease	Vaccine	Type	Lot #	Historical Detail
07/09/2012	DIPHTHERIA, TETANUS, ACELLULAR PERTUSSIS	DTaP-Hib-IPV	DHI	MC4059AA-C3928AA	<input type="checkbox"/>

Dosage	Nurse	Injection Site	Clinic Site	Manufacturer
.5/ML		LEFT THIGH	HORRID COMMUNITY CENTER	Sanofi Pasteur

CPT	CVX Code	ICD Code	VIS	NDC #	Charge	Extra Dose	Charge to Employer	Do Not Charge Insurance	No Administration Charge
90698	120	V06.8	05-17-07	49281-0510-05	14.65	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

TB Results	TB Induration	Processing Dates	Upload to Impact	Insurance Billing	Vaccine Accountability	Return Date/Time
			08/16/2018	12/26/2018	06/28/2017	04/10/2017 11:20 A

Last Modified: 07/09/2012 12:13 PM  
Modified By: \_MigrateImmunizations

Save Cancel

## Health Services Page – Existing Client

As you arrow through the list, the details pertaining to the selected service record (highlighted in yellow) are displayed in the bottom portion of the screen.

Details displayed include:

- Lot #, Dosage and Manufacturer of the vaccine
- Location where the vaccination was administered and name of nurse to administer it
- Billing related details.
- Various additional details
- Processing Dates indicating when record was processed in various procedures.
- Date/Time client is scheduled to return for next vaccination



## Order of Display

By default, the order which the history of vaccinations / services is displayed is by disease by date, as shown below.

There are three columns which the heading text is in bold. These are columns for which you can select to change the order the records are displayed.

For Disease and Dose, the display is in ascending order only.

<b>Disease</b>	<b>Date</b>	<b>Vaccine</b>	<b>Dose</b>	<b>Age</b>	<b>Lot #</b>	<b>Clinic Site</b>
DTAP	07/21/2010	DTaP-Hib-IPV	1	2M	UNKNOWN	
DTAP	07/09/2012	DTaP-Hib-IPV	2	26M	MC4059AA-C392E	HORRID COMMUNITY CENTER
DTAP	08/13/2012	DTaP-Hib-IPV	3	27M	MC4195AA-C397E	HORRID COMMUNITY CENTER
DTAP	03/10/2014	DTaP	4	3	MC4454BA	HORRID COMMUNITY CENTER
DTAP	04/10/2017	DTaP-IPV	5	6	M43HB3	HORRID COMMUNITY CENTER
HIB	07/21/2010	DTaP-Hib-IPV	1	2M	UNKNOWN	
HIB	07/09/2012	DTaP-Hib-IPV	2	26M	MC4059AA-C392E	HORRID COMMUNITY CENTER
HIB	08/13/2012	DTaP-Hib-IPV	3	27M	MC4195AA-C397E	HORRID COMMUNITY CENTER
HEPA	08/13/2012	HepA	1	27M	MAHAVB523AA	HORRID COMMUNITY CENTER
HEPA	03/10/2014	HepA	2	3	M55RX2	HORRID COMMUNITY CENTER
HEPB	07/21/2010	HepB	1	2M	UNKNOWN	
HEPB	07/09/2012	HepB	2	26M	M1260AA	HORRID COMMUNITY CENTER
HEPB	01/14/2013	HepB	3	32M	MH011183	HORRID COMMUNITY CENTER
MMR	07/09/2012	MMR	1	26M	M1023AA	HORRID COMMUNITY CENTER

### Health Services Disease Order

<b>Disease</b>	<b>Date</b>	<b>Vaccine</b>	<b>Dose</b>	<b>Age</b>	<b>Lot #</b>	<b>Clinic Site</b>
DTAP	07/21/2010	DTaP-Hib-IPV	1	2M	UNKNOWN	
HIB	07/21/2010	DTaP-Hib-IPV	1	2M	UNKNOWN	
HEPA	08/13/2012	HepA	1	27M	MAHAVB523AA	HORRID COMMUNITY CENTER
HEPB	07/21/2010	HepB	1	2M	UNKNOWN	
MMR	07/09/2012	MMR	1	26M	M1023AA	HORRID COMMUNITY CENTER
PCV	07/21/2010	PCV13	1	2M	UNKNOWN	
IPV	07/21/2010	DTaP-Hib-IPV	1	2M	UNKNOWN	
ROT	07/21/2010	Rotavirus, 3 DOSE	1	2M	UNKNOWN	
VAR	07/09/2012	Var	1	26M	M0949AA	HORRID COMMUNITY CENTER
DTAP	07/09/2012	DTaP-Hib-IPV	2	26M	MC4059AA-C392E	HORRID COMMUNITY CENTER
HIB	07/09/2012	DTaP-Hib-IPV	2	26M	MC4059AA-C392E	HORRID COMMUNITY CENTER
HEPA	03/10/2014	HepA	2	3	M55RX2	HORRID COMMUNITY CENTER
HEPB	07/09/2012	HepB	2	26M	M1260AA	HORRID COMMUNITY CENTER
MMR	04/10/2017	MMR	2	6	MM029230	HORRID COMMUNITY CENTER

### Health Services Dose # Order



For Date, the display will at first be in ascending order. For multiple vaccination details on the same date, they will be ordered by disease.

With each subsequent click of the date header, the display will toggle between ascending/descending order. The pictures below show the effect of clicking on the date header and then clicking the header again to change to descending order.

Disease	Date	Vaccine	Dose	Age	Lot #	Clinic Site
DTAP	07/21/2010	DTaP-Hib-IPV	1	2M	UNKNOWN	
HIB	07/21/2010	DTaP-Hib-IPV	1	2M	UNKNOWN	
IPV	07/21/2010	DTaP-Hib-IPV	1	2M	UNKNOWN	
HEPB	07/21/2010	HepB	1	2M	UNKNOWN	
PCV	07/21/2010	PCV13	1	2M	UNKNOWN	
ROT	07/21/2010	Rotavirus, 3 DOSE	1	2M	UNKNOWN	
DTAP	07/09/2012	DTaP-Hib-IPV	2	26M	MC4059AA-C392E	HORRID COMMUNITY CENTER
HIB	07/09/2012	DTaP-Hib-IPV	2	26M	MC4059AA-C392E	HORRID COMMUNITY CENTER
IPV	07/09/2012	DTaP-Hib-IPV	2	26M	MC4059AA-C392E	HORRID COMMUNITY CENTER
HEPB	07/09/2012	HepB	2	26M	M1260AA	HORRID COMMUNITY CENTER
MMR	07/09/2012	MMR	1	26M	M1023AA	HORRID COMMUNITY CENTER
PCV	07/09/2012	PCV13	2	26M	MF24141	HORRID COMMUNITY CENTER
VAR	07/09/2012	Var	1	26M	M0949AA	HORRID COMMUNITY CENTER
DTAP	08/13/2012	DTaP-Hib-IPV	3	27M	MC4195AA-C3973	HORRID COMMUNITY CENTER

*Health Services Date Ascending Order*

Disease	Date	Vaccine	Dose	Age	Lot #	Clinic Site
DTAP	08/13/2012	DTaP-Hib-IPV	3	27M	MC4195AA-C3973	HORRID COMMUNITY CENTER
VAR	07/09/2012	Var	1	26M	M0949AA	HORRID COMMUNITY CENTER
PCV	07/09/2012	PCV13	2	26M	MF24141	HORRID COMMUNITY CENTER
MMR	07/09/2012	MMR	1	26M	M1023AA	HORRID COMMUNITY CENTER
HEPB	07/09/2012	HepB	2	26M	M1260AA	HORRID COMMUNITY CENTER
IPV	07/09/2012	DTaP-Hib-IPV	2	26M	MC4059AA-C392E	HORRID COMMUNITY CENTER
HIB	07/09/2012	DTaP-Hib-IPV	2	26M	MC4059AA-C392E	HORRID COMMUNITY CENTER
DTAP	07/09/2012	DTaP-Hib-IPV	2	26M	MC4059AA-C392E	HORRID COMMUNITY CENTER
ROT	07/21/2010	Rotavirus, 3 DOSE	1	2M	UNKNOWN	
PCV	07/21/2010	PCV13	1	2M	UNKNOWN	
HEPB	07/21/2010	HepB	1	2M	UNKNOWN	
IPV	07/21/2010	DTaP-Hib-IPV	1	2M	UNKNOWN	
HIB	07/21/2010	DTaP-Hib-IPV	1	2M	UNKNOWN	
DTAP	07/21/2010	DTaP-Hib-IPV	1	2M	UNKNOWN	

*Health Services Date Descending Order*

When the display order is changed, the display of records will be refreshed such that the detail record currently selected at time of change remains in view and selected, per the case the client has additional vaccination details which occurred the same day.

Below the grid displaying vaccination history, you will find a row of buttons for selecting the desired action. Most of these buttons are disabled when in Browse / View mode. Upon clicking the Modify button (if not already done on another page) shifting to edit mode, the Modify button is disabled and all other buttons are enabled for selection, as shown below:



*Buttons upon shifting to edit mode.*

- The status of **Browse/Edit** mode on the Services page is separate from the Browse/Edit mode of the client's entire record. However, you must be in **Edit** mode for the client in order to be able to get to **Edit** mode for the Services details.
- The availability of the **Edit** and **Delete** buttons is determined by whether or not the vaccination record has been processed by other procedures. Once the record is processed by such procedures, the ability to **Edit** and **Delete** the vaccination record will be disabled. The procedures for **Editing** vaccination records are discussed starting on the next page. Procedures for deleting vaccination records are discussed on page 48.

### Functions provided in the Health Services page

Button	Function
Defaults	Manage specifying the selection of values to be the default selection for various details when adding new details.
Enter History	Enter details of historical vaccinations which occurred prior to the clients arrival at the clinic or at other facilities since the most recent visit to the health department.
Forecast	View the history of vaccinations against the forecast schedule timeframes in which a client is to receive the series of doses for each disease.
Add	Add a new record per having a vaccine administered.
Edit	Edit an existing vaccination record.
Delete	Deletes an existing vaccination record.
VIS Forms	Browse to select/print PDF file containing VIS details to hand to client
Print	Printing of vaccination history for client and other various printouts
Modify	Shifts screen for client from View / Browse mode to Edit mode. This enables editing of health services data details.

The details for the Defaults are found on page 53, Enter History page 31, Forecast Display on page 49, and Print functions on page 55.

There are three avenues in which vaccination details can be entered into HDIS:

- To enter vaccination details, you must first click the Modify button, to change from View / Browse mode to Edit mode, in the Services page for the client.

The screen used for entering Historic Vaccination Details is accessed by clicking the Enter History button on the left side of the Services screen below the grid display.

[illegible]

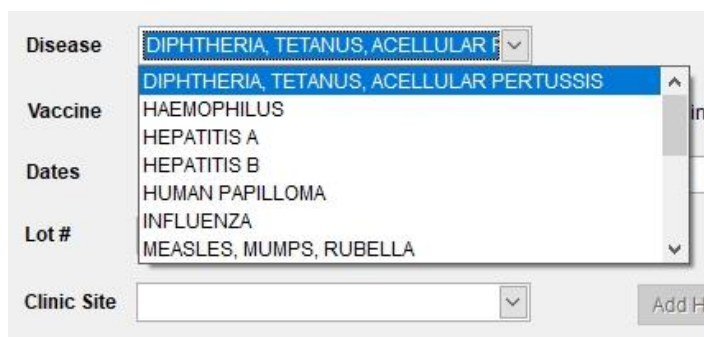
### Selection of Disease

Selection of the disease which the historical detail pertains to can be achieved one of three ways:

1. Select from the drop-down list
2. Type ahead on the disease name
3. Use Up and Down arrow keys to scroll through the list

Only the diseases which are specified as **Actively in Use** in the **Disease / Vaccine Maintenance** screen will be presented in the list.

The following shows the list displayed upon clicking the drop-down arrow at the right end of the field. If the desired disease is not visible in the display, use the scroll bar on the right to find the desired disease.



The screenshot shows a form with the following fields: Disease, Vaccine, Dates, Lot #, and Clinic Site. The Disease field is open, displaying a list of diseases: DIPHTHERIA, TETANUS, ACELLULAR PERTUSSIS (highlighted), HAEMOPHILUS, HEPATITIS A, HEPATITIS B, HUMAN PAPILLOMA, INFLUENZA, and MEASLES, MUMPS, RUBELLA. The Vaccine field is empty. The Dates, Lot #, and Clinic Site fields are also empty. An 'Add H' button is visible at the bottom right.

For the type-ahead function, simply type the first few letters of the desired disease in a rapid manner (rather than clicking the drop-down arrow). Upon pausing in entering keystrokes, the display will stop on the first entry matching the letters entered.

The following is the result of typing **ped** in this manner.



The screenshot shows the same form as before, but the Disease field now displays 'PEDIATRIC PNEUMOCOCCAL CONJUGATE VACCINE' (highlighted). The Vaccine field now displays 'PCV13'. The Dates, Lot #, and Clinic Site fields are still empty. The 'Add H' button is still visible at the bottom right.

When the letters for the type-ahead keystrokes match to multiple entries, the first entry matching the keystrokes will be displayed.

For example, in typing **men** to get to **Meningococcal B**, the search will first match to **Meningitis**. Simply press the **Down Arrow** to move to the **Meningococcal B** selection which is next in the list.

## Selection of Vaccine

Upon selection of the disease, the list of vaccines selected to be displayed when adding history details (via the **Add History** selection in the **Disease / Vaccines maintenance** screen) will be extracted and the vaccine with the history order designation of 'A' will be selected as default.

- Vaccines with the **Add History** selection but no history order specification will appear at the end of the list.
- Vaccines with the **Add History** specification not selected are omitted from the list. This would pertain to definitions such as Declines, Not Eligible, etc.

The following is an example display of vaccines for the **Pediatric Pneumococcal Conjugate** disease.

<b>Vaccine</b>	PCV13	<input type="checkbox"/> Pos
<b>Dates</b>	PCV13	PN13
	PCV7	PN7
	Pneumococcal (NOS)	PNU

## Selecting Compound vs Individual Vaccines

One of the features in entering historical vaccination details is that you can select a compound vaccine and when the details are posted, entries are created in the vaccination data details for all diseases which the compound vaccine pertains to.

You can specify whether to post the vaccination details showing the compound vaccine selected or the general vaccine specification of each disease.

This is achieved with the selection displayed right of the Vaccine selection, as shown below.

<b>Disease</b>	DIPHTHERIA, TETANUS, ACELLULAR F
<b>Vaccine</b>	DTaP-Hib-IPV <input checked="" type="checkbox"/> Post Vaccinations with Compound Vaccine

When a simple vaccine is selected, the Post Vaccinations with Compound Vaccine specification is disabled, as shown below.

<b>Disease</b>	DIPHTHERIA, TETANUS, ACELLULAR F
<b>Vaccine</b>	Td <input type="checkbox"/> Post Vaccinations with Compound Vaccine

The default specification for the Post Vaccinations with Compound Vaccine is set in the Health Services tab in the General Profile screen.

Upon entering the Health Services screen, this setting is initialized with the specification in General Profile.

This selection may be changed by the user when entering a historic detail. When the selection is modified, the new specification will remain until the user modifies it again or he exits the Health Services screen.

When a compound vaccine is selected, only enter dates which are common to all diseases of the compound vaccine.

If one or more vaccinations for any of the diseases which the compound vaccine pertains to were administered separately, they must be entered separately.

If you decide not to select the compound vaccine, you must enter historic vaccination details must be entered separately for each disease.

Posting vaccinations having selected a compound vaccine with the **Post Vaccinations with Compound Vaccine** setting checked and not checked is discussed beginning on page 39.

### Entry of Dates

Upon selection of the disease, the quantity of date fields displayed will be updated to match the number of vaccinations defined for the disease in the Vaccination Schedule maintenance screen.

The maximum number of historic dates provided for entry is 5, per the case of the DTaP vaccination schedule.

For Diseases which do not have Vaccination Schedule details defined, only one date is provided.

The following display shows entry of historic DHI vaccinations for four dates.

Disease	DIPHTHERIA, TETANUS, ACELLULAR F				
Vaccine	DTaP-Hib-IPV	<input checked="" type="checkbox"/> Post Vaccinations with Compound Vaccine			
Dates	07/12/2010	09/28/2010	12/13/2010	04/28/2011	//
Lot #	UNKNOWN				
Clinic Site	CROOKED COUNTY HEALTH DEPT.				
					<input type="button" value="Copy DTaP Dates"/> <input type="button" value="Add History"/> <input type="button" value="View Dates Only"/>



### Additional Details for Historic Vaccinations

The additional details which can be specified for historical vaccinations are :

Lot #'s for vaccines administered	As these are typically unknown, that is the value which the field is pre-populated with.  This value is for reference only. It is <b>not</b> associated with the lots defined in the Vaccine Inventory maintenance screen.
Clinic Site	List of options available for selection are defined from the Clinic Sites designated as Active In Use in the Clinic Sites maintenance screen.

### Saving Details of Historical Vaccinations entered

As the minimum detail requirements for historical vaccinations are **Disease, Vaccine** and at least **one date value**, once those details have been specified, the **Add History** button will be available for selection as shown below.

Disease	DIPHTHERIA, TETANUS, ACELLULAR F				
Vaccine	DTaP-Hib-IPV	<input checked="" type="checkbox"/> Post Vaccinations with Compound Vaccine			
Dates	07/12/2010	09/28/2010	12/13/2010	04/28/2011	//
Lot #	UNKNOWN				
Clinic Site	CROOKED COUNTY HEALTH DEPT.				
					<input type="button" value="Add History"/> <input type="button" value="View Dates Only"/>

Upon clicking the **Add History** button, an entry of the historic vaccination details will be displayed in the grid in the bottom section of the screen, as shown on the next page, and the details of the Disease and Vaccines are set for selection of details for the next historic entry.

Additionally, the details of dates, Lot # and Clinic Site for the latest entry are retained to simplify entry of multiple vaccinations at the same time.

Date	Disease	Vaccine	Lot #	Clinic Site
07/12/2010	DIPHTHERIA, TETANUS, ACELLULAR PERTUSSIS	DTaP-Hib-IPV	UNKNOWN	MC

Display after adding the history entry for the DTaP example

### IMPORTANT

Clicking the Add History button does not perform the posting of details into the main Health Services data file. It is simply adding it to a tentative list of entries to be posted into the main Health Services data.

### Copy DTaP Dates function

As historic vaccinations for multiple diseases often occur the same day, a function to copy date values from historic details pertaining to DTaP vaccinations is provided.

- This feature is functional only when there is a historic entry pertaining to DTaP vaccinations (either individual or compound) defined in this screen.
- In the case there are multiple entries in the screen referring to DTaP, the dates for the first DTaP entry will be copied.

When selecting the disease for the next historic entry, the number of dates displayed corresponds to the number of events defined in the Vaccination Schedule, if any.

If you scroll through a disease with only one or two dates and then to a disease with more dates, only the dates pertaining to the previous disease's events will be retained.

The following shows the effect of scrolling through the list after adding the DHI entry, to reach Hepatitis B. Since some of the diseases preceding it in the list are not defined in the Vaccination Schedule, entry of only one date value applies. Thus, only the first date entered for the DTaP entry is displayed, upon reaching Hepatitis B.



Disease: HEPATITIS B

Vaccine: HepB ☒ Post Vaccinations with Compound Vaccine

Dates: 07/12/2010 // // Copy DTaP Dates

To reset the vaccination dates with those of the DTaP entry, simply click the Copy DTaP Dates button on the right side of the screen. The result of this is displayed below.

Disease: HEPATITIS B

Vaccine: HepB ☒ Post Vaccinations with Compound Vaccine

Dates: 07/12/2010 09/28/2010 12/13/2010 Copy DTaP Dates

### Viewing Dates in list of Entries

Upon entering the second entry for Hepatitis B, the history list displayed will appear as shown below.

Date	Disease	Vaccine	Lot #	Clinic Site
07/12/2010	DIPHTHERIA, TETANUS, ACELLULAR PERTUSSIS	DTaP-Hib-IPV	UNKNOWN	MC
07/12/2010	HEPATITIS B	HepB	UNKNOWN	MC

You can see that only the first date specification of 07/12/2010 is displayed.

To view the additional dates specified for the historic details, simply click the button labeled **View Dates Only**. Upon doing so, the history list display will change as shown here.

Date	Disease	Vaccine	Date 2	Date 3	Date 4	Date 5
07/12/2010	DIPHTHERIA, TETANUS, ACELLULAR PERTUSSIS	DTaP-Hib-IPV	09/28/2010	12/13/2010	04/28/2011	
07/12/2010	HEPATITIS B	HepB	09/28/2010	12/13/2010		

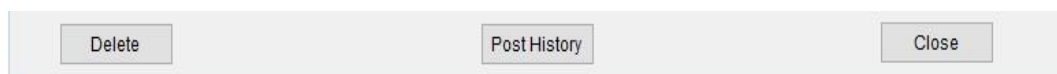
To return to the original display, click the button again.

Each time the button is clicked, the label will change to reflect the toggle between 'Dates Only' and 'All Details'.

### Vaccination History List Processing

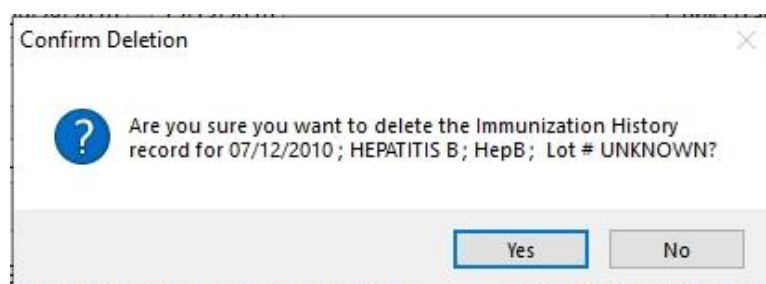
As stated previously, the addition of a historical entry to the list DOES NOT automatically post the detail(s) into the main Health Services data details.

The buttons at the bottom of the screen allow the user to indicate what to do about the history details entered. The buttons provided are:



Upon clicking one of these buttons, the user will receive a message similar to the samples displayed below.

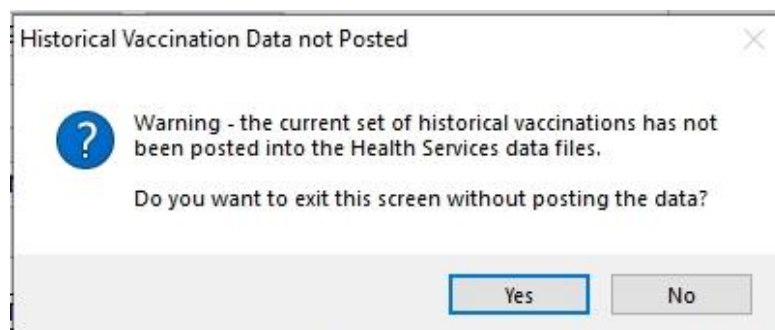
Delete



Post History



Close



This message will be displayed only when there is history details entered but not posted.

As previously stated, entry in the history list DOES NOT post the detail(s) into the main Health Services data details. Thus, entries can simply be deleted in the list to prevent them from being posted into the main data.

To delete an entry in the history list, click the mouse on the appropriate entry to be deleted. The selected entry will be highlighted in yellow. Then click the Delete button and confirm deletion of entry.

Upon deleting an entry in the history list, the list will be refreshed. The following shows the result after deleting the Hepatitis B entry.

Date	Disease	Vaccine	Lot #	Clinic Site	
07/12/2010	DIPHTHERIA, TETANUS, ACELLULAR PERTUSSIS	DTaP-Hib-IPV	UNKNOWN	MC	

### Posting with compound vaccine selection

As stated previously, you can select to have historical entries, with a compound vaccine specified, posted with the compound vaccine or the individual vaccine specified. Below are examples per entering historical details using DHI vaccine selection but Post with Compound not checked and Twinrix vaccine having Post with Compound checked.

Disease	DIPHTHERIA, TETANUS, ACELLULAR F				
Vaccine	DTaP-Hib-IPV	<input type="checkbox"/> Post Vaccinations with Compound Vaccine			
Dates	06/05/2019	08/12/2019	10/24/2019	//	Copy DTaP Dates

*Entry of history having Post with Compound unchecked*

Disease	HEPATITIS A				
Vaccine	HepA-HepB	<input checked="" type="checkbox"/> Post Vaccinations with Compound Vaccine			
Dates	06/12/2019	08/23/2019	Copy DTaP Dates		

*Entry of history having Post with Compound checked*

The result of posting the entry of these historical vaccinations is shown on the next page.

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Find		Demo		Information		Health Services		Statements	
Disease	Date	Vaccine	Dose	Age	Lot #	Clinic Site			
DTaP	06/05/2019	DTaP	1	2M	UNKNOWN				
DTaP	08/12/2019	DTaP	2	4M	UNKNOWN				
DTaP	10/24/2019	DTaP	3	6M	UNKNOWN				
HIB	06/05/2019	HIB	1	2M	UNKNOWN				
HIB	08/12/2019	HIB	2	4M	UNKNOWN				
HIB	10/24/2019	HIB	3	6M	UNKNOWN				
HEPA	06/12/2019	HepA-HepB	1	2M	UNKNOWN				
HEPA	08/23/2019	HepA-HepB	2	4M	UNKNOWN				
HEPB	06/12/2019	HepA-HepB	1	2M	UNKNOWN				
HEPB	08/23/2019	HepA-HepB	2	4M	UNKNOWN				
IPV	06/05/2019	IPV	1	2M	UNKNOWN				
IPV	08/12/2019	IPV	2	4M	UNKNOWN				
IPV	10/24/2019	IPV	3	6M	UNKNOWN				

*Health Services screen after historical entries posted*

You see the vaccination details posted as follows:

- Details for DHI vaccine posted with simple DTaP, HIB, and IPV vaccines specified
- Details for Twinrix vaccine posted with 'HepA-HepB' vaccine specified.

## Add / Edit Individual Vaccination

To add a new vaccination detail, click on the Add command button and follow the steps discussed, starting on the next page.

To edit an existing vaccination detail, highlight the desired vaccination record in the grid and click the Edit button and edit the details in same manner as when editing a new vaccination.

- When editing an existing vaccination, the disease name specification cannot be changed.
- If the vaccination is specified to be a historical vaccination detail, only the vaccine, lot # and Clinic Site values can be edited in the text boxes provided.

### Selecting from lists

The lists for selecting Disease, Vaccine, Lot #, Nurse, Injection Site, and Clinic Site all support a type-ahead / search function. When you type in the first few letters of the desired selection in a rapid manner, a search for the first entry in the list matching the sequence of keys is performed. If there are multiple entries in the list matching the letters typed, the first entry will be displayed as selected and the arrow keys (Up and Down) can be used to scroll through the list to find the desired selection.

For Nurse, Injection Site, and Clinic Site details which allow no selection, an entry for the blank selection is provided at the top of the list. Simply press the Up Arrow or select it from the list displayed.

### **Specifying details for new vaccination – Step 1**

First, the date of the vaccination, the disease which the vaccination pertains to, and the specific vaccine administered must be specified.

Date	Disease	Vaccine	Type	Lot #	<input type="checkbox"/> Historical Detail
12/27/2018			DTAP		

Upon specifying the disease, the list of vaccines pertaining to the selected disease is queried and displayed in the Vaccine list. Factors used to determine which vaccines to display in the list include:

Add Vaccine	The designation to display the vaccine for selection when adding vaccinations
Add Order	The designation per the order which such vaccines are listed.
Age group	Vaccines to be administered only to children/adolescents are excluded from the list when the client is over 18 years of age. Conversely, vaccines to be administered only to adults/seniors are excluded from the list when client is under 19 years of age. Vaccines to be administered to seniors only are extracted when client is 65 years of age or older.
Actively In Use	Designation that the vaccine is amongst those currently available to be administered.

These details are specified in the Vaccine page of the Disease / Vaccine Maintenance screen.

For this example, we have selected Hepatitis A as the disease and will select the HepA(ped/adol) vaccine.

Vaccine	Type
DTAP	DTAP
HepA	HEPA
HepA(NOS)	HEPA
HepA(ped)	HEPA
<b>HepA(ped/adol)</b>	<b>HEPA</b>
HepA-HepB	HAV-HBV
HepA-HepB	TWIN
DECLINED *	DEC

NOTE: With HDIS Health Services expanded to provide entry of clinical related services, the labeling for the Disease / Vaccine fields are updated to show Service / Activity. An example of the updated display can be found in the section discussing entry of clinical services activities on page 47.

### Specifying details for new vaccination – Step 2

Once the Date, Disease, and Vaccine are specified, the list of vaccine lots available in inventory is extracted and displayed in the Lot # list field.

The following details are factored into the list of lot #'s extracted:

- Selected Vaccine      Only vaccine lots specified for the selected vaccine are extracted.
- Active in Inventory      The specification that a vaccine lot is still in active inventory as specified in the Vaccine Inventory Maintenance screen, shown here.

☒ **Active in Current Inventory**

The list of active lots in inventory for the selected vaccine are extracted and displayed in the list of Lot #'s, shown below.

Lot #
M3R7C4
<b>M9N33Z</b>
MN005274
PM047658
PN005796
UNKNOWN

Per the case of entering historical vaccination details, the selection of 'UNKNOWN' is added at the end of the list of lot #'s. In this example, lot # M9N33Z will be selected.

Upon selecting the lot #, all details pertaining to the selected lot are filled in for the vaccination detail, as shown below.

Date 11/15/2018	Disease HEPATITIS A	Vaccine HepA(ped/adol)	Type HEPA	Lot # M9N33Z	<input type="checkbox"/> Historical Detail
Dosage 0.50 ML	Nurse	Injection Site	Clinic Site	Manufacturer GlaxoSmithKline	
CPT 90633	CVX Code 83	ICD Code Z23	VIS 07-20-16	NDC # 58160-0825-11	Charge 21.25
				<input type="checkbox"/> Extra Dose	<input type="checkbox"/> Charge to Employer <input type="checkbox"/> Do Not Charge Insurance

When specified in the Defaults screen, the Nurse, Injection Site and Clinic Site values will be filled in with the first of the default selections, if any.

Specifying default selections for Nurse, Injection Site, Clinic Site and Lot #'s is discussed in the Default Selection Screen beginning on page53.

Upon selecting the option of "UNKNOWN", the user will receive a prompt to verify whether or not the entry is for historical reference, as shown here:

Verify History Detail

Is this vaccination record to be a Vaccination History detail record?

Yes No

Upon confirming that the entry is for historical reference, the checkbox labeled 'Historical Detail' will show a checkmark to reflect the detail.

Lot # UNKNOWN	<input checked="" type="checkbox"/> Historical Detail
------------------	---



### Specifying details for new vaccination – Step 3

After data is filled in from the vaccine lot details, the details of the vaccination will appear similar to the following (which reflects there being no default selections for Nurse, Injection Site, or Clinic Site):

Date 11/15/2018	Disease HEPATITIS A	Vaccine HepA(ped/adol)	Type HEPA	Lot # M9N33Z	<input type="checkbox"/> Historical Detail
Dosage 0.50 ML	Nurse	Injection Site	Clinic Site	Manufacturer GlaxoSmithKline	
CPT 90633	CVX Code 83	ICD Code Z23	VIS 07-20-16	NDC # 58160-0825-11	Charge 21.25
TB Results	TB Induration	Processing Dates	Upload to Impact Insurance Billing	<input type="checkbox"/> Extra Dose <input type="checkbox"/> Charge to Employer <input type="checkbox"/> Do Not Charge Insurance <input type="checkbox"/> No Administration Charge	
Last Modified 07/29/2013 12:13 PM			Return Date/Time 07/29/2013 03:20 P		
Modified By _MigrateImmunizations			<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

At this time, user can make selections to the details of the Nurse to administer the vaccination, the Injection Site and the Clinic Site where the vaccination occurred.

Although not enforced at this time, entry of Injection Site must be specified per submission of details to ImpactSiis.

You will notice at this time that with all details required for processing by the procedures noted in the Processing Dates area, the button to save the details is now available to select.

Before clicking the button to **Save** the record, enter all the details available for editing which are to have values entered/selected. All required fields are shown with the color of Yellow until a value is entered.

Upon clicking to save the vaccination details, the data is added to the data file and the vaccination details for the client are re-extracted and displayed with the just saved vaccination detail highlighted, as shown below.

Disease	Date	Vaccine	Dose	Age	Lot #	Clinic Site
DTAP	02/20/2013	DTaP	1	2M	UNKNOWN	
DTAP	04/16/2013	DTaP	2	4M	UNKNOWN	
DTAP	07/29/2013	DTaP	3	7M	MC4378AA	BIONICVILLE
HIB	02/20/2013	HIB	1	2M	UNKNOWN	
HIB	04/16/2013	HIB	2	4M	UNKNOWN	
HIB	07/29/2013	Hib-HepB	3	7M	MJ002621	BIONICVILLE
HEPA	11/15/2018	HepA(ped/adol)	1	5	M9N33Z	BROWNVILLE MIDDLE SCHOOL
HEPB	12/12/2012	HepB	1	0M	UNKNOWN	
HEPB	02/20/2013	HepB	2	2M	UNKNOWN	
HEPB	04/16/2013	HepB	3	4M	UNKNOWN	
HEPB	07/29/2013	Hib-HepB	4	7M	MJ002621	BIONICVILLE
PCV	02/20/2013	PCV13	1	2M	UNKNOWN	
PCV	04/16/2013	PCV13	2	4M	UNKNOWN	
PCV	07/29/2013	PCV13	3	7M	MG20393	BIONICVILLE

*Vaccination Details Display after Save*

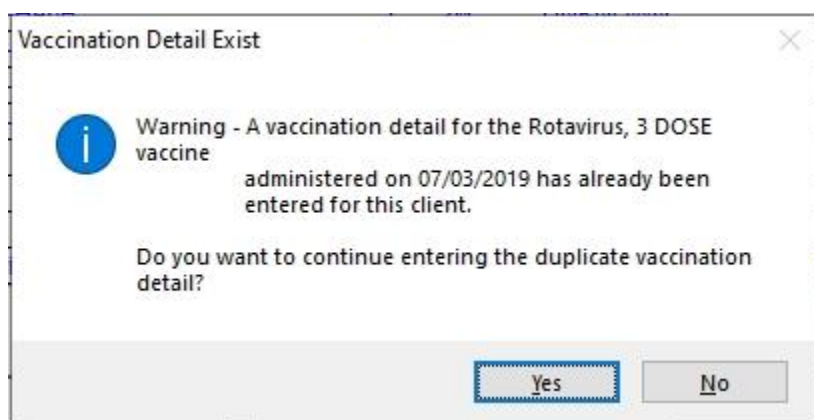


## Multiple Entry of dosage details

There are times when the user will need to enter multiple instances of vaccine dosage being administered to the client, such as using two .5 mL dosages for a 1.0 mL dose.

As a vaccination detail is entered, upon specifying the vaccine, the system will check to see if a vaccination detail has already been entered into HDIS for the disease/vaccine specified being administered on the date entered.

If a vaccination detail is found to already exist, a message similar to that shown here is displayed to the user.



*Warning of duplicate entry of vaccination*

When the user selects No, the system will return to the vaccine selection with vaccine selection cleared.

When the user selects Yes, the system will return to the vaccine selection with the vaccine shown as selected. Entry of remaining details of the vaccination proceeds as normal.

The following shows the result of entering two doses of the Rotavirus, 3 Dose vaccine for the same day.

Health Services - BROWN, MATTHEW - 04/01/2019 - 10M / 45 Weeks - M.R.#: 36631 - Status: NOT CURRENT						
Find	Demo	Information	Health Services		Statements	
Disease	Date	Vaccine	Dose	Age	Lot #	Clinic Site
HEPA	08/23/2019	HepA-HepB	2	4M	UNKNOWN	
HEPB	06/12/2019	HepA-HepB	1	2M	UNKNOWN	
HEPB	08/23/2019	HepA-HepB	2	4M	UNKNOWN	
IPV	06/05/2019	IPV	1	2M	UNKNOWN	
IPV	08/12/2019	IPV	2	4M	UNKNOWN	
IPV	10/24/2019	IPV	3	6M	UNKNOWN	
ROT	07/03/2019	Rotavirus, 3 DOSE	1	3M	PM040269	CROOKED COUNTY HEALTH DEPT.
ROT	07/03/2019	Rotavirus, 3 DOSE	1	3M	PM041770	

Multiple entry of vaccine dosage

### Notes per entry for multiple doses

When the details for the multiple doses are processed in HDIS, the following results will be reflected:

- For Vaccination Schedule, they will be processed as a single vaccination event.  
When a different date is specified for the second of a multiple dose entry, it will be handled as a separate vaccination event and be matched to the next vaccination forecast schedule detail.
- Excluding the second dose entry from being included in the vaccination forecast process can be done by checking the **Extra Dose** specification when the second dosage is entered.
- For Vaccine Reports, the multiple doses are reported / processed separately.
- For Insurance Billing, the multiple doses are submitted as separate line item charges on the claim.
- For ImpactSiis, the multiple doses are consolidated as a single vaccination, reflecting the total dosage amount for the multiple vaccination details.

### **Processing Dates Details**

In the bottom center of the Services detail screen you will see a set of dates indicating when the selected health service record was processed by other procedures in HDIS relevant for the record.

<b>Processing Dates</b>	Upload to Impact	//
	Insurance Billing	//
	Vaccine Accountability	//

The processing dates applicable for a health services record depends on what type of services detail the record pertains to.

Type of Service	Processes applicable
Actual vaccination	All three processes
Historic vaccination	Only Upload to Impact
Clinical Service	Only Insurance Billing

The type of service specification is determined by the definition of the categories and selection of such category for the Disease and Vaccine (or Service and Activity per Clinical Services) in the Disease / Vaccine Maintenance screen.

### **IMPORTANT:**

**For vaccination details, upon being processed by the Vaccine Accountability procedure, the vaccine and vaccine lot details of the health service record will no longer be available to edit.**

To have the vaccination detail processed by Upload to Impact or Insurance Billing subsequent to the modifications, the user must clear out the process date value pertaining to such process.

## Deleting Vaccination Detail Data

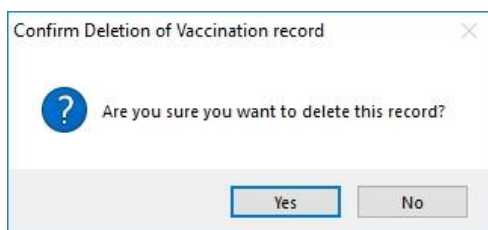
As discussed previously in the Process Dates section of the Health Services manual, the ability to delete a health services detail record is based on whether or not the record has been processed by one or more of the procedures pertinent to that detail record.

The reason for enforcing this function is that once the health services detail record is processed, we do not want the details for the record to be changed without justification. The following indicates when deletion of a health service record will be permitted.

Type of Service	Deletion Permitted When
Actual vaccination	Not processed by the Vaccine Accountability
Historic vaccination	Anytime
Clinical service	Not processed for Insurance Billing

When the selected health services detail record satisfies the criteria of not being by the specified process(s), the **Delete** button will be enabled for user to click.

Upon clicking to delete a health service detail record, the user will be prompted to verify deletion of selected detail:



Upon clicking Yes to verify the deletion of selected detail, that detail record will be deleted and the Health Services screen will refresh details displayed, reflecting the deletion of selected detail.

Upon clicking No to abort the deletion, the system will return to the Health Services page as if the Delete button had not been clicked at all.

## Vaccination Forecast Screen

The Vaccination Forecast screen provides the display of a client's vaccination history against the schedules defined in the Vaccination Schedule Maintenance screen.

Upon entry to the Forecast screen, only the diseases for which the client is not current will be displayed.

Vaccination Forecast Schedule / Status

**Vaccination History Relative to Forecast Schedule**

JOHN A BROWN  
DOB : 05/04/2010

☒ Non-current / Upcoming Diseases ☐ All Diseases

Disease	Last Vaccination Details		Schedule Tallies			Last Schedule Details		Next Scheduled Date
	Date	Vaccine	Total	Admin	Missed	Upcoming	Date	
DTAP	03/10/2014	DTaP	6	4	1		05/04/2015	DTAP
HIB	08/13/2012	DTaP-Hib-IPV	4	3	1		02/13/2013	HIB
IPV	08/13/2012	DTaP-Hib-IPV	4	3	1		05/04/2015	IP
PCV	07/09/2012	PCV13	4	2	2		09/09/2012	PNU
ROT	07/21/2010	Rotavirus, 3 DOSE	3	1	2		09/21/2010	ROTA
HPV			3		3		05/04/2019	HPV
FLU			2		2		03/07/2019	FLU

☒ Chicken Pox 10/2016

Return Date/Time  
04/10/2017 11:20 AM

**Vaccination History vs Forecast Schedule Details**  
DIPHTHERIA, TETANUS, ACELLULAR PERTUSSIS

Vaccine Type	Dose #	Due Date	Vaccination Date	Age	Vaccine Administered	Notification Date
DTAP	1	07/04/2010	07/21/2010	2 Mos	DTaP-Hib-IPV	06/04/2010
DTAP	2	09/04/2010	07/09/2012	26 Mos	DTaP-Hib-IPV	08/05/2010
DTAP	3	11/04/2010	08/13/2012	27 Mos	DTaP-Hib-IPV	10/05/2010
DTAP	4	05/04/2011	03/10/2014	3	DTaP	04/04/2011
DTAP	5	05/04/2015		5		04/04/2015
TDAP	6	05/04/2025		15		04/04/2025

Add Print Exit

### Vaccination History Display – Diseases Not Current

To view statuses for all vaccines: click the **All Diseases** option at top of screen. An example of the display for all diseases is provided on the next page.

Vaccination Forecast Schedule / Status

**Vaccination History Relative to Forecast Schedule**

JOHN A BROWN  
DOB : 05/04/2010

☐ Non-current / Upcoming Diseases ☒ All Diseases

Disease	Last Vaccination Details		Schedule Tallies				Last Schedule Details		Next Scheduled Date
	Date	Vaccine	Total	Admin	Missed	Upcoming	Date	Vaccine Type	
DTAP	03/10/2014	DTaP	6	4	1		05/04/2015	DTAP	05/04/2025
HIB	08/13/2012	DTaP-Hib-IPV	4	3	1		02/13/2013	HIB	
IPV	08/13/2012	DTaP-Hib-IPV	4	3	1		05/04/2015	IP	
MMR	04/10/2017	MMR	2	2					
HEPB	01/14/2013	HepB	3	3					
VAR	04/10/2017	Var	2	2					
PCV	07/09/2012	PCV13	4	2	2		09/09/2012	PNU	
ROT	07/21/2010	Rotavirus, 3 DOSE	3	1	2		09/21/2010	ROTA	
HEPA	03/10/2014	HepA	2	2					
MEN			2						05/04/2021
MENB			2						05/04/2026
HPV			3		3		05/04/2019	HPV	
FLU			2		2		03/07/2019	FLU	
PNE			1						05/04/2075

☒ Chicken Pox 10/2016

Return Date/Time  
04/10/2017 11:20 AM

**Vaccination History vs Forecast Schedule Details**  
DIPHTHERIA, TETANUS, ACELLULAR PERTUSSIS

Vaccine Type	Dose #	Due Date	Vaccination Date	Age	Vaccine Administered	Notification Date
DTAP	1	07/04/2010	07/21/2010	2 Mos	DTaP-Hib-IPV	06/04/2010
DTAP	2	09/04/2010	07/09/2012	26 Mos	DTaP-Hib-IPV	08/05/2010
DTAP	3	11/04/2010	08/13/2012	27 Mos	DTaP-Hib-IPV	10/05/2010
DTAP	4	05/04/2011	03/10/2014	3	DTaP	04/04/2011
DTAP	5	05/04/2015		5		04/04/2015
TDAP	6	05/04/2025		15		04/04/2025

Add Print Exit

### Vaccination History Display – All Diseases

As a disease is selected in the top display showing status for each disease, the details of vaccination history data matched to the Vaccination Schedule definitions is displayed in the bottom portion of the screen.

Details will be highlighted in various colors to reflect the following situations:

**None** Client is current and/or has received all vaccinations.

Per remaining vaccinations, the date of the next vaccination scheduled will be displayed.

**Red** Client is not current

Details of first due date which was missed are displayed and highlighted

**Yellow** Client is due to receive the next scheduled vaccination within the time period for notification prior to the due date.

This time period for notification is entered in the Vaccination Schedule Maintenance screen in the field labeled "Forecast Alert Duration"

Entry of a vaccination event can be initiated from this screen by clicking the Add button at the bottom of the screen.

- The system will jump to the Services screen in the mode of Adding vaccinations.
- The disease will be specified as the disease selected at the time of clicking the Add button in the Forecast screen.

Below is an example of having clicked the Add button when the detail row for DTAP was highlighted.

Date 02/08/2018	Disease DIPHTHERIA, TETANUS, ACELLULAR PERTUSSIS	Vaccine DTAP	Type DTAP	Lot #	<input type="checkbox"/> Historical Detail
Dosage	Nurse	Injection Site LEFT THIGH	Clinic Site	Manufacturer	
CPT 90700	CVX Code 20	ICD Code Z23	VIS	NDC #	Charge 0.00
TB Results	TB Induration	Processing Dates	Upload to Impact	Insurance Billing	Vaccine Accountability
			Charge to Employer	Do Not Charge Insurance	No Administration Charge
			Extra Dose	Return Date/Time	

You can see, the system has shifted to the regular Vaccination Entry screen with the disease pre-selected as DTaP and the date set to the current date. You can complete entry of the vaccination in the same manner as editing the record in the Services page.

Upon completing entry of vaccination and saving the details, the system will return to the Forecast screen and refresh the forecast details to reflect the just added vaccination detail, with the date changed to 4/10/2017, as shown in the next page.



Vaccination Forecast Schedule / Status

**Vaccination History Relative to Forecast Schedule**

☐ Non-current / Upcoming Diseases
 ☒ All Diseases

JOHN A BROWN  
DOB : 05/04/2010

Disease	Last Vaccination Details		Schedule Tallies				Last Schedule Details		Next Scheduled Date	
	Date	Vaccine	Total	Admin	Missed	Upcoming	Date	Vaccine Type		
DTAP	04/10/2017	DTaP-IPV	6	5					05/04/2025	<input checked="" type="checkbox"/> Chicken Pox 10/2016
HIB	08/13/2012	DTaP-Hib-IPV	4	3	1		02/13/2013	HIB		
IPV	04/10/2017	DTaP-IPV	4	4						
MMR	04/10/2017	MMR	2	2						
HEPB	01/14/2013	HepB	3	3						
VAR	04/10/2017	Var	2	2						
PCV	07/09/2012	PCV13	4	2	2		09/09/2012	PNU		
ROT	07/21/2010	Rotavirus, 3 DOSE	3	1	2		09/21/2010	ROTA		
HEPA	03/10/2014	HepA	2	2						
MEN			2						05/04/2021	
MENB			2						05/04/2026	
HPV			3		3		05/04/2019	HPV		
FLU			2		2		03/07/2019	FLU		
PNE			1						05/04/2075	

Return Date/Time  
04/10/2017 11:20 AM

**Vaccination History vs Forecast Schedule Details**  
DIPHTHERIA, TETANUS, ACELLULAR PERTUSSIS

Vaccine Type	Dose #	Due Date	Vaccination Date	Age	Vaccine Administered	Notification Date
DTAP	1	07/04/2010	07/21/2010	2 Mos	DTaP-Hib-IPV	06/04/2010
DTAP	2	09/04/2010	07/09/2012	26 Mos	DTaP-Hib-IPV	08/05/2010
DTAP	3	11/04/2010	08/13/2012	27 Mos	DTaP-Hib-IPV	10/05/2010
DTAP	4	05/04/2011	03/10/2014	3	DTaP	04/04/2011
DTAP	5	05/04/2015	04/10/2017	6	DTaP-IPV	04/04/2015
TDAP	6	05/04/2025		15		04/04/2025

Add Print Exit

You can see that the 4/10/2017 DTaP-IPV vaccination which was just added has been matched to the 5<sup>th</sup> vaccination event and the color display has changed from Red to None since the client is now considered current for the DTaP vaccines. Same for the IPV vaccines with the 4/10/2017 vaccination being matched to the fourth vaccination event.

To get a printout of a client's immunization history, click the Print button at the bottom of the Vaccination History screen.



## Default Selections Screen

The Default Selections screen allows the user to designate which options are to be placed at the top of the list for selection when details for vaccination activities are being entered.

- Selections specified in the Default screen are specific to the workstation.  
A different set of default selection criteria can be specified on another computer without affecting the current workstation.
- When no options are selected for a specific detail, then that value will default as blank in the entry screen, as shown previously in the steps 2 and 3 of the entry of new vaccination.

Upon clicking the button labeled 'Defaults' on any of the Find, Information, or the Services pages, the screen for specifying selections to be displayed at the top of the lists for selection in the entry screen is displayed, as shown on the next page.

- For Vaccine Lots, only those specified as Active in Current Inventory in the Vaccine Inventory screen are displayed.
- For Nurses, Clinic Sites and Injection Sites, only those selections specified as Active in the maintenance screens will be displayed for selection.

More than one option may be selected.

When that is the case, the options selected will be placed at the top of the list with all other options following. When more than one option is designated for default selection, the field will be filled with the first one selected.

For Vaccine Lots, default selections can be made on lots for multiple diseases.

Entry of a value in the Default Date specification will result in the vaccination date for entry of new vaccination details to be assigned that date value.

This is useful for when the user is entering a large quantity of vaccination details from a clinic.

Entry of a value in the Default Return Date specification will result in the return date specification for a client being updated with the default value.

**Do not use the Default Return Date function if you use the Appointment Books module of HDIS.**

Health Services Defaults

Vaccine Lots			Nurses		Clinic Sites		
Type	Lot	Default	Name	Default	Code	Name	Default
DHI	MC5298AA	<input type="checkbox"/>		<input type="checkbox"/>	CMS	BROWNVILLE MIDDLE SCHOOL	<input type="checkbox"/>
DHI	PC5336AA	<input type="checkbox"/>	BARTON, CLARA	<input type="checkbox"/>	MC	CROOKED COUNTY HEALTH DEPT.	<input checked="" type="checkbox"/>
DI	M43HB3	<input checked="" type="checkbox"/>	BRADLEY, RUBY	<input type="checkbox"/>			
DI	MAF543	<input type="checkbox"/>	CAVELL, EDITH	<input type="checkbox"/>			
DI	P43HB3	<input checked="" type="checkbox"/>	CURIE, MARIE	<input checked="" type="checkbox"/>			
DI	P7574T	<input type="checkbox"/>	FAIRCHILD, HELEN	<input type="checkbox"/>			
DTAP	MC5102AA	<input type="checkbox"/>	HENDERSON, VIRGINIA AVE	<input type="checkbox"/>			
DTAP	MC5157AA	<input checked="" type="checkbox"/>	MAXWELL, ANNA	<input checked="" type="checkbox"/>			
DTAP	PC4778BA	<input type="checkbox"/>	WHITMAN, WALT	<input type="checkbox"/>			
DTAP	PC5065AA	<input type="checkbox"/>					
DTAP	PC5171AA	<input checked="" type="checkbox"/>					
FLU QUAD	MUT5686MA	<input type="checkbox"/>					
FLU QUAD	PUI673AD	<input type="checkbox"/>					
FLU6-35	MU5599AC	<input type="checkbox"/>					
FLU6-35	MUT5663RA	<input type="checkbox"/>					
FLU6-35	MUT5691MA	<input type="checkbox"/>					
FLU6-35	PUT5683KA	<input type="checkbox"/>					
FLUINTRA	PUT5573AA	<input type="checkbox"/>					
FLUTPR	PU5586CA	<input type="checkbox"/>					
HEPA	M3PJ73	<input checked="" type="checkbox"/>					
HEPA	M3R7C4	<input type="checkbox"/>					
HEPA	M9N33Z	<input type="checkbox"/>					
HEPA	MN005274	<input type="checkbox"/>					
HEPA	P3PJ73	<input checked="" type="checkbox"/>					
HEPA	PM047658	<input type="checkbox"/>					

Remove Default Check Marks

Default Date:

Default Return Date:

Print Inventory Close

*Default Selection screen*

Upon selecting all desired default selections, click the Close button to return to the screen which was displayed at the time the Defaults button was selected.

## Print Screen

The ability to generate printouts such as a client's Immunization History and statements of unpaid bills for past services not covered by insurance is provided in the Health Services Print screen displayed below:

**Print**

**Form:**

☒ Print Imms ☐ Clinical Services

☐ Print Imms (minimum info) ☐ Print Imms (minimum info 2)

☐ Print Imms with Medical Notes

☐ Print Imms with General & Medical Notes

☐ Print Imms (2 Columns / Alpha Order)

☐ Print Imms (2 Columns / With Due Date & Medical Notes)

☐ Print Imms (2 Columns / With Due Date, Medical & General Notes)

☐ Print Imms (1 page with 2 Columns, Due Dates, Ques.)

☐ Print Imms Questionnaire Only

☐ Print HEA3309

☐ Print All Demographic Window Tabs

☐ Print Imms Questionnaire with Demographics ☐ Print Inventory Lot Numbers

☐ Print Blank Immunization Form ☐ Print Flu Consent Form

☐ Routing Slip / Super Bill ☐ Print Blank Flu Consent Form

**Output to:**

☒ Preview ☐ Print

**Blank Line and/or Add All Diseases**

☒ No Blank Line

☐ Add a Blank Line

☐ Add a Blank Line & All Diseases

☐ Add All Diseases

**Questionnaire**

☒ No Questionnaire

☐ Add Questionnaire A ☐ Add Questionnaire E

☐ Add Questionnaire B ☐ Add Questionnaire F

☐ Add Questionnaire C ☐ Add Questionnaire G

☐ Add Questionnaire D ☐ Add Questionnaire H

OK Close

This screen is displayed upon clicking the Print button in one of the pages in the Health Services screen.

The details provided in the printouts generated for the selections are described on the next page:

<b>Option</b>	<b>Description</b>
All Print Imms / Immunization selections	Generate a printout of the client's Immunization History Details
HEA 3309	Printout of client vaccination history on HEA 3309 form
Demographic Window Tabs	Printout of client details entered in the Demo page
Routing Slip / Super Bill	Printout of all charge amounts for selected categories.  The categories listed are extracted from the categories specified in the Maintenance -> Insurance Fee Codes screen
Flu Consent Forms	Consent form to present to client or parent/guardian pertaining to receiving a vaccination for the Flu.
Clinical Services	Generate a printout of the clinical services provided to the client
Immunization Invoice & Statements	Printouts generated for details entered in the Statements Page.  These are discussed further in the section per Statements, beginning on the next page.

The following options are available only for Immunization related selections

Blank Line and/or Add All Diseases	Specification to add a blank detail line under each disease reported Specification to include All Diseases defined in the Vaccination Schedule, even when there is no vaccination detail for the disease.
Questionnaire	Print selected questionnaire text at end of Immunization History Details  The body / text of the questionnaires are entered in the Maintenance -> Questionnaire menu option.

## Statements Page

\* The Statements page is available only if the **Insurance Billing Client Statements** module is installed in HDIS.

The Statements page of the Health Services screen is where user can perform tasks pertaining to providing details about health services which the client is responsible for paying.

### *Client Statements Details page in Health Services*

Upon clicking the Statements tab in the Health Services screen, the details of statements provided to the client will be displayed.

When no statements have been created, the screen display as blank with date values initialized as the current date and only the **Add Statement** and **Copy Imms** buttons enabled.

When statement details already exist, the details of the first statement entered will be displayed.

Upon leaving the Find page to view details for selected client, the label for the Statements page will be shown in **red** when any statement details exist which still have a balance remaining to be paid.

## Methods for entering charges

There are two methods in which details of charges and adjustments can be entered for a statement record.

1. Individual Entry of Charges / Adjustments
2. Import details from Health Services data details

## Create Statements

Prior to entry of charge details, the statement record needs to be created. That is achieved by clicking on the 'Add Statement' button at the top of the screen, shown here.

Account # <input type="text"/>	<input type="button" value="Add Statement"/>
-----------------------------------	--

Upon creating the new statement record, you can enter details of charges for the statement.

## Entry of Charges Individually

- Enter Individual Charge

Details required for a charge entered include the Date of Service, Fee Scale specification, Medical Billing Fee code, Program specification.

The Program specification is for the purpose of classifying what program the statement detail pertains to.

Programs can be defined in the Program Codes maintenance screen located under the Insurance Billing -> Maintenance menu.

Upon entering the details, as shown below, you can click the Add Charge button to create the record in the statement details.

Date of Service <input type="text" value="04/13/2018"/>	Fee Scale <input type="text" value="A"/> ▼	MED Fee Code <input type="text" value="90686"/> ▼	Program <input type="text" value="IMM"/> ▼	<input type="button" value="Add Charge"/>	<input type="button" value="Add Charge and Adjustment"/>
--	---	--	---	---	--

Account #	110496NEVAN	Add Statement	Delete Statement	Previous	Next	Copy Imms*	//	//	//	Statement Sent	Statement Bal	21.25
-----------	-------------	---------------	------------------	----------	------	------------	----	----	----	----------------	---------------	-------

Date of Service	04/13/2018	Fee Scale	A	MED Fee Code	90686	Program	IMM	Add Charge	Add Charge and Adjustment
-----------------	------------	-----------	---	--------------	-------	---------	-----	------------	---------------------------

Date of Payment/Adjustment	04/13/2018	<input checked="" type="radio"/> Check <input type="radio"/> Cash <input type="radio"/> CC <input type="radio"/> Adj. <input type="radio"/> W/O	Program	IMM	Amount	0.00	Add Payment
----------------------------	------------	---	---------	-----	--------	------	-------------

Date of Service	FS	Name	Description	Remark	Charge	Credit	CPT	Modifier	ICD	Units	NDC #
04/13/2018	A	LONDON	FLU 3 YRS. & UP		21.25		90686		Z23	1	

- Entry of Individual Charge with Adjustment Detail

When the Fee Scale is specified as 'A' or blank, then the charge amount will be the full price for the vaccine. Otherwise, we reference the appropriate scale price specification in the MED Billing Fee table to generate an adjustment detail for the difference between the full price and the sliding scale price.

Fee Code	Description	Charge	Charge A	Charge B	Charge C	Charge D	Charge E	Charge F	CPT Code	CPT Mo
90620P	MENINGOCOCCAL B (BEXSERO) PRIV	195.00	195.00	155.00	115.00	70.00	35.00	0.00	90620	

Date of Service	Fee Scale	MED Fee Code	Program		
10/22/2018	B	90620P	IMM	Add Charge	Add Charge and Adjustment





Account # 110496NEVAN Add Statement Delete Statement Previous Next Copy Imms\* Statement Sent // // // Statement Bal 155.00

Date of Service 10/22/2018 Fee Scale B MED Fee Code Program IMM Add Charge Add Charge and Adjustment

Date of Payment/Adjustment 10/22/2018 Program IMM Amount 0.00 Add Payment

Date of Service	FS	Name	Description	Remark	Charge	Credit	CPT	Modifier	ICD	Units	NDC #
10/22/2018	B	LONDON	MENINGOCOCCAL B (BEXSERO) P		195.00		90620		Z23	1	
10/22/2018	B	LONDON	ADJUSTMENT		-40.00		90620		Z23	1	

### Importing details from Health Services data

Rather than having to enter all details of charges individually for vaccination activities which occurred on a particular date, you can utilize the Copy Health Services function. To use the Copy Health Services feature, perform the following:

Specify the Date of Service which the health services activities took place.

Click the RIGHT mouse button on the button labeled 'Copy Imms\*' at the top of the screen.

Copy Imms\*

The presence of the asterisk in the label of the button is to remind the user per the need to right-click the mouse to run this process.

When complete, the details for all health services entered for the desired service date will be created for the statement and appear similar to that shown below:

Health Services - BROWN, JOHN A - 05/04/2010 - 9 - M.R.#: 28462 - Status: NOT CURRENT - \*\*\*CHECK NOTES\*\*\*

Find Demo Information Health Services Statements

Account # 050410NEWDA Add Statement Delete Statement Previous Next Copy Imms\* Statement Sent // // // Statement Bal 63.75

Date of Service 04/10/2017 Fee Scale A MED Fee Code Program Add Charge Add Charge and Adjustment

Date of Payment/Adjustment 04/10/2017 Program Amount 0.00 Add Payment

Date of Service	FS	Name	Description	Remark	Charge	Credit	CPT	Modifier	ICD	Units	NDC #
04/10/2017	A	JOHN	MMR		21.25		90707		Z23	1	00006-
04/10/2017	A	JOHN	VAR		21.25		90716		Z23	1	00006-
04/10/2017	A	JOHN	DTAP-IPV		21.25		90696		Z23	1	58160-I

Details are imported as they appear in the Health Services record. Only when billing related details are missing (CPT code, ICD code, and charge amount 0.00) will the program look for such details in the vaccine lot record of the immunization detail.

In the case that user has added entries per payments and/or adjustments first, this process will add to the existing data, not replace it.



### **Include Admin Charge for Vaccination**

When a vaccination detail is submitted for regular billing to the Insurance Carriers, charge(s) for the service of administering the vaccine(s) are added to the claim details.

Details for administration charges to be included when the Copy Imms is performed is achieved by defining special Fee codes in the Insurance Fee Codes screen accessed from the Maintenance menu. These definitions will have an 'S' appended to the standard fee code value. If no such fee codes are defined, then no admin charge details are created.

#### Creation of admin charge codes for statements

The Fee Code definitions for admin charges added to client statements are created with the following steps:

1. Select the fee code definition for the standard fee code, with no supplemental letters.
2. Click the Duplicate Fee Code button in the lower right corner.

The new copy of selected fee code will be displayed in the list immediately below the existing definition.

3. Click the mouse on the Fee Code value for the new definition.
4. Append the fee code value with an 'S' (capitalized).

This process will need to be performed separately for each of the admin fee codes of 90460, 90461, 90471, and 90472.

### Entering Details of Payments and Adjustments

Upon receiving payment from the client for the charges they are responsible for, you will need to enter details of such payments. Additionally, you may decide to write-off some small balance amount and can do so by entering the detail specified as Adjustment or Write-Off.

- Details of Payment

Details required in entry of payment are Date of Payment, method of payment, program specification and the payment amount. The following is an example of payment by check for \$50.00.

Date of Payment/Adjustment	Program	Amount	
04/18/2019	IMM	50.00	<input checked="" type="radio"/> Check <input type="radio"/> Cash <input type="radio"/> CC <input type="radio"/> Adj. <input type="radio"/> W/O <input type="button" value="Add Payment"/>

Upon completing entry of details, click the 'Add Payment' button to post the payment under the current statement details. Other payment options for selection are Cash and Credit Card.

Upon posting payment, the statement details are updated to reflect the payment, as shown here. With \$63.75 in vaccination charges, and the \$50 payment, the statement balance in the upper right corner shows \$13.75.

Health Services - BROWN, JOHN A - 05/04/2010 - 9 - M.R.#: 28462 - Status: NOT CURRENT - \*\*\*CHECK NOTES\*\*\*

Find	Demo	Information	Health Services	Statements						
Account #	Statement Sent			Statement Bal						
050410NEWDA	//			13.75						
<input type="button" value="Add Statement"/> <input type="button" value="Delete Statement"/> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Copy Imms*"/>										
Date of Service	Fee Scale	MED Fee Code	Program							
04/10/2017	A			<input type="button" value="Add Charge"/> <input type="button" value="Add Charge and Adjustment"/>						
Date of Payment/Adjustment	Program	Amount								
04/18/2019		0.00	<input type="button" value="Add Payment"/>							
<input checked="" type="radio"/> Check	<input type="radio"/> Cash	<input type="radio"/> CC	<input type="radio"/> Adj.	<input type="radio"/> W/O						
Date of Service	FS Name	Description	Remark	Charge	Credit	CPT	Modifier	ICD	Units	NDC #
04/10/2017	A JOHN	MMR		21.25		90707		Z23	1	00006~
04/10/2017	A JOHN	VAR		21.25		90716		Z23	1	00006~
04/10/2017	A JOHN	DTAP-IPV		21.25		90696		Z23	1	58160~
04/18/2019	A JOHN	CHECK		0.00	50.00					

Statement Details after Payment Posted

- Details of Adjustment / Write-off

Upon logging all payments by the client, there may be a balance due which remains.

You may decide to zero out the balance by entering a detail with the option of Adjustment or Write-Off.

Designating the Adjustment / Write-Off is done by clicking the mouse on the appropriate option displayed.

When entering the amount, simply enter the amount as a positive value, the program will post the detail as a negative charge amount.

The following show the selection of the payment type per entering adjustments and write-offs.

Date of Payment/Adjustment	Program	Amount	
04/18/2019	IMM	10.00	<input type="button" value="Add Adjustment"/>
<input type="radio"/> Check <input type="radio"/> Cash <input type="radio"/> CC <input checked="" type="radio"/> Adj. <input type="radio"/> W/O			

Date of Payment/Adjustment	Program	Amount	
04/18/2019	IMM	3.75	<input type="button" value="Add Write-Off"/>
<input type="radio"/> Check <input type="radio"/> Cash <input type="radio"/> CC <input type="radio"/> Adj. <input checked="" type="radio"/> W/O			

The following shows the statements details after having entered a payment of \$50, entering an adjustment for \$10 and writing off the remaining \$3.75, showing a balance of \$0.00.

Health Services - BROWN, JOHN A - 05/04/2010 - 9 - M.R.#: 28462 - Status: NOT CURRENT - \*\*\*CHECK NOTES\*\*\*

Find	Demo	Information	Health Services	Statements
------	------	-------------	-----------------	------------

Account # 050410NEWDA

Statement Sent    Statement Bal 0.00

Date of Service	Fee Scale	MED Fee Code	Program	
04/10/2017	A			<input type="button" value="Add Charge"/> <input type="button" value="Add Charge and Adjustment"/>

Date of Payment/Adjustment	Program	Amount	
04/18/2019		0.00	<input type="button" value="Add Write-Off"/>
<input type="radio"/> Check <input type="radio"/> Cash <input type="radio"/> CC <input type="radio"/> Adj. <input checked="" type="radio"/> W/O			

Date of Service	FS	Name	Description	Remark	Charge	Credit	CPT	Modifier	ICD	Units	NDC #
04/10/2017	A	JOHN	MMR		21.25		90707		Z23	1	00006-
04/10/2017	A	JOHN	VAR		21.25		90716		Z23	1	00006-
04/10/2017	A	JOHN	DTAP-IPV		21.25		90696		Z23	1	58160-
04/18/2019	A	JOHN	CHECK		0.00	50.00					
04/18/2019	A	JOHN	ADJUSTMENT		-10.00	0.00					
04/18/2019	A	JOHN	WRITE-OFF		-3.75	0.00					

*Statement Details with Payment, Adjustment and Write-Off*

- Adding Remark specification to line item

Typically, for adjustments and write-offs, you will want to note the reason for such detail.

To add a remark about the line item charge detail, click the mouse in the Remark cell for the appropriate charge detail and OK the Remark code specification desired. The following shows the remark code '09' having been entered in the adjustment detail.

04/18/2019	A	JOHN	ADJUSTMENT	09	-10.00	0.00						
------------	---	------	------------	----	--------	------	--	--	--	--	--	--

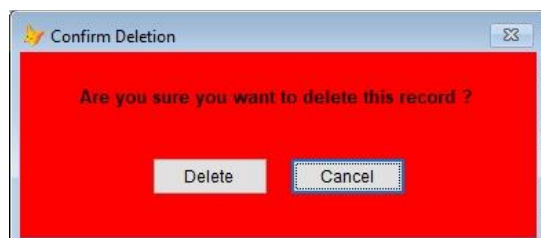
The remark code specifications are defined in the 'Statement Remarks' menu option of the Insurance Billing / Statements -> Maintenance menu.

### Deletion of Statement Details

When there is a need to delete statement details, either the entire statement or individual line details, you will need to navigate to the desired statement record using the Previous / Next buttons.

- Deleting entire statement

To delete an entire statement detail record, click the **Delete Statement** button at the top of the screen. You will receive the message prompt shown below to verify that you want to delete the entire statement detail.



To continue with deletion of the entire statement detail, click the **Delete** button. To abort the deletion and retain the entire statement, click the **Cancel** button.

- Deleting individual charges of statement

When you only need to delete an individual line item detail from the statement, simply click the mouse on the row of the line item to be deleted. A black triangle will display in the block on the left margin to confirm the correct line item record is selected for deletion.

To complete the deletion of the line item charge, right-click the mouse on the button labeled **Delete Line\*** at the bottom of the screen.

Upon completing the deletion of the line item charge(s), the screen will refresh to display the remaining charges. Below is the result after deleting both the adjustment detail and the payment detail previously entered.

Health Services - BROWN, JOHN A - 05/04/2010 - 9 - M.R.#: 28462 - Status: NOT CURRENT - \*\*\*CHECK NOTES\*\*\*

Find Demo Information Health Services Statements

Account # 050410NEWDA Statement Sent // // // Statement Bal 53.75

Add Statement Delete Statement Previous Next Copy Imms\*

Date of Service 02/07/2020 Fee Scale A MED Fee Code Program Add Charge Add Charge and Adjustment

Date of Payment/Adjustment 02/07/2020 Program Amount 0.00 Add Payment

☒ Check ☐ Cash ☐ CC ☐ Adj. ☐ W/O

Date of Service	FS Name	Description	Remark	Charge	Credit	CPT	Modifier	ICD	Units	NDC #
04/10/2017	A JOHN	MMR		21.25		90707		Z23	1	00006-
04/10/2017	A JOHN	VAR		21.25		90716		Z23	1	00006-
04/10/2017	A JOHN	DTAP-IPV		21.25		90696		Z23	1	58160-
04/18/2019	A JOHN	ADJUSTMENT	09	-10.00	0.00					

*Health Services Statements Display after Deletion of Line Items*

You see that only the adjustment entry remains and that the Statement Balance has been updated accordingly.

## Printing Statements

When you want to generate the printout of a statement to provide to the client, either in person or by mail, you can generate the statement in the Print screen of the Health Services screen.

In the upper right corner of the Print screen display, you will see a box outlining the available print options pertaining to statements.

☐ Print Immunization Invoice

☐ Print Statement by From & To Dates

☐ Print Only This Statement

☐ Print Only This Statement for Insurance

- **Print Immunizations Invoice**

This option enables printing of an invoice to provide to the client for activities which occurred during the time period entered.

The following is a sample invoice for activities occurring between 4/1/2017 and 4/30/2018

**BGI**  
**7550 LUCERNE DR.**  
**MIDDLEBURG HTS., OH 44130**  
**1-440-891-9100**  
**Federal Tax ID# 00123456789**  
**NPI #1234567890**  
**Place of Service: 71**

**02/13/2020**

**Patient Name:** JOHN A BROWN  
**Street:** 14245 NORTH LN  
**City, State, Zip:** GOTHAM CITY, OH 99999  
**DOB:** 05/04/2010      **SSN #:** 000-27-0462  
**Parent Name:** JANE BROWN

Date	CPT	ICD	NDC #	Dosage	Vaccine Name	Amount
04/10/2017	90696	Z23	58160-0812-11	.5ML	DTaP-IPV	0.00
04/10/2017	90707	Z23	00006-4681-00	.5ML	MMR	0.00
04/10/2017	90716	Z23	00006-4827-00	.5ML	Var	0.00
02/13/2020	90471				Vaccine Administration	75.00

**Total:** 75.00

**Amount Paid:** \_\_\_\_\_

**Balance Due:** \_\_\_\_\_

*Example Invoice*

- Print Statement by From & To Dates

This option allows for printing the statement report for statement details over a period of time.

For each line detail, the last column titled 'Balance' shows the running balance after that transaction.

When this option is selected, if there are statements prior to the time period entered for the From/To dates, a detail line reflecting the unpaid balance of the statements prior to the time period is provided, as demonstrated by the example shown below.

The first example is a statement for the time period of 7/1/2012 through 12/31/2012.

The second example is a statement for the time period of 1/1/2013 through 12/31/2013.

This example shows an entry 'Previous Balance' reflecting the balance shown on the total line of the first example.

**BGI**  
**7550 LUCERNE DR.**  
**MIDDLEBURG HTS., OH 44130**  
**1-440-891-9100**

Account #
050410NEWDA
Statement Date
02/11/2020

JOHN A BROWN  
C/O: JANE BROWN  
14245 NORTH LN  
GOTHAM CITY, OH 99999

-----  
Please tear here and return the top portion with your payment.

Make check payable to Baldwin Health Services.

Date	Name	Description	Charge	Rmk	Credit	Balance
07/09/2012	JOHN	Var	14.65			14.65
07/09/2012	JOHN	PCV13	14.65			29.30
07/09/2012	JOHN	MMR	14.65			43.95
07/09/2012	JOHN	HepB	14.65			58.60
07/09/2012	JOHN	DTaP-Hib-IPV	14.65			73.25
08/13/2012	JOHN	HepA	14.65			87.90
08/13/2012	JOHN	DTaP-Hib-IPV	14.65			102.55
<b>TOTALS</b>			102.55		0.00	102.55

**PAYMENT DUE UPON RECEIPT OF INVOICE**

<b>PLEASE PAY THIS AMOUNT</b>	102.55
-------------------------------	--------

*Example statement 7/1/2012 through 12/31/2012*



**BGI**  
**7550 LUCERNE DR.**  
**MIDDLEBURG HTS., OH 44130**  
**1-440-891-9100**

Account #
050410NEWDA
Statement Date
02/11/2020

JOHN A BROWN  
C/O: JANE BROWN  
14245 NORTH LN  
GOTHAM CITY, OH 99999

-----  
Please tear here and return the top portion with your payment.

Make check payable to Baldwin Health Services.

Date	Name	Description	Charge	Rmk	Credit	Balance
		PREVIOUS BALANCE	0.00			102.55
01/14/2013	JOHN	HepB	14.65			117.20
<b>TOTALS</b>			14.65		0.00	117.20

**PAYMENT DUE UPON RECEIPT OF INVOICE**

PLEASE PAY THIS AMOUNT	117.20
------------------------	--------

*Example statement 1/1/2013 through 12/31/2013*

An entry for 'Previous Balance' is included, reflecting the balance shown on the total line of the first example.



- Print Only This Statement
- Print Only This Statement for Insurance

These two options print the same detail with the option for Insurance containing verbiage related to Insurance.

The first example shows the details portion of the statement for only the activities on 04/10/2017

The second example shows the full statement generated for insurance for the activities on 04/10/2017

**BGI**  
**7550 LUCERNE DR.**  
**MIDDLEBURG HTS., OH 44130**  
**1-440-891-9100**

Account #
050410NEWDA
Statement Date
02/11/2020

JOHN A BROWN  
C/O: JANE BROWN  
14245 NORTH LN  
GOTHAM CITY, OH 99999

-----  
Please tear here and return the top portion with your payment.

Make check payable to Baldwin Health Services.

Date	Name	Description	Charge	Rmk	Credit	Balance
04/10/2017	JOHN	MMR	21.25			21.25
04/10/2017	JOHN	Var	21.25			42.50
04/10/2017	JOHN	DTaP-IPV	21.25			63.75
04/18/2019	JOHN	ADJUSTMENT	-10.00	09		53.75
<b>TOTALS</b>			53.75		0.00	53.75

**PAYMENT DUE UPON RECEIPT OF INVOICE**

PLEASE PAY THIS AMOUNT	53.75
------------------------	-------

**Remarks:**

Rmk 09 : Revised bill-Clinic service code error

*Statement for only the activities on 04/10/2017*

**BGI**  
**7550 LUCERNE DR.**  
**MIDDLEBURG HTS., OH 44130**  
**1-440-891-9100**

JOHN A BROWN  
C/O: JANE BROWN  
14245 NORTH LN  
GOTHAM CITY, OH 99999

Account #

050410NEWDA

Statement Date

02/11/2020

Date	Description	CPT	Modifier	ICD	Units	Charge	Credit	Balance
04/10/2017	MMR NDC# - 00006-4681-00	90707		Z23	1	21.25		21.25
04/10/2017	Var NDC# - 00006-4827-00	90716		Z23	1	21.25		42.50
04/10/2017	DTaP-IPV NDC# - 58160-0812-11	90696		Z23	1	21.25		63.75
04/18/2019	ADJUSTMENT					-10.00		53.75

TOTAL CHARGED: 63.75

TOTAL ADJUST/WRITE OFF: -10.00

TOTAL PAYMENTS: 0.00

TOTAL AMOUNT DUE: 53.75

**Provider Information**

Provider Name: BGI

Federal Tax ID: 00123456789

NPI #:

Place of Service: 71

**PATIENT INSTRUCTIONS:** Complete the patient information portion of your insurance claim form. Attach this bill, signed and dated, and all other bills pertaining to the claim. If you have a deductible policy, hold your claim forms until you have met your deductible. Mail directly to your insurance carrier.

**INSURANCE COMPANY: PLEASE ISSUE PAYMENT TO PATIENT.****PATIENT PAID PROVIDER FOR THESE SERVICES****Patient Signature: \_\_\_\_\_ Date: \_\_\_\_\_***Full statement generated for activities on 04/10/2017*

This can be provided to the client to submit to his insurance provider himself.