



#### How to Update Patient Information in the Online Registry

**Reports** can be used in the Online Registry to update demographic and contact information for patients at your facility. The Reports tool allows you to make changes to a patient's first name, last name, date of birth, sex, address, email, and phone number. You can also use this tool indicate if the patient is active at your practice or has Moved or Gone Elsewhere (MOGE).

1. Search for and select the patient whose information you wish to update.

If the patient belongs to your practice and has been looked up before, you can search for the patient in **MyList**. You can also use the **Search** screen to locate a patient record. See below.

To select a patient from MyList:

- Click on the MyList icon.
- Search for the patient by first and last name.
- Select the patient record by clicking on the patient's name in the list below.



To select a patient from Search:

- Click on the Search icon.
- Complete all 4 search fields, then click Continue.
- Choose "This IS the patient" if the information on the screen matches the patient.
- You can also try using the "Advanced Search" tab.



Complete all fields below to find a patient's record in the CIR. All fields must match exactly. To search by medic number, CIR number or other demographics, use <u>Advanced Search</u>.

Search	🕤 Tip
First Name	Find patients previously accessed by users at this facility by s <u>MyList</u>
Last Name	
DOB mm/dd/yyyy	
Gender CMCF	
Clear 🗌 Continue 🌙	







## Online Registry – Updating Patient Info and Modifying Immunization Events

www.nyc.gov/health/cir

 On the current screen, click on the "Update Patient Info" tab.



the shots!



3. You may edit any of the fields you see on the screen. Once finished, click "Continue".

O Please note we are requesting new additional patient information:

- It may be helpful to check all fields for errors.
- If the patient has left your practice, you can change their status here.
- Please add the patient's current email and cell phone number so the patient can use My <u>Vaccine Record</u> to access their yaccine record.

	centribule profile fulfiber and email address. Please dpdate an mormation. The mormation will be used to populate your reports and forms.			
Final Manage	nation		To prefer to address to	
First Name	TESTROSS	Alternate First	<ul> <li>Is patient active?</li> <li>Yes, natient is currently in my practice</li> </ul>	
Middle Name			O No (select reason)	
Last Name	BARTEST	Alternate Last <sup>†</sup>	<ul> <li>Not in my practice (Gone elsewhere)</li> <li>Not in NVC (Meyerd)</li> </ul>	
DOB	09 04 1966		O Patient deceased	
Sex	Male	▼ >		
House No. / Street / Apt. No.				
City / State / ZIP BROOKLYN NY V 11213		]		
Medical Rec. N	o	Medicaid No. (AA*****A) †		
Mom DOB <sup>†</sup>		mm/dd/yyyy		
Mom First Name† Mom Maiden Name†				
Primary Conta	<sup>ct</sup> First Name	Last Name	Relationship	
Home Phone	ome Phone (718) Cell/Mobile & Home Phone are the same Patient's status is set to accept text messages Selecting checkbox will copy the Yes No O		Patient's status is set to accept text messages: <b>‡</b>	
NEW Cell/Mob	ile (718)	Home Phore number to both fields.	If you change the patient's status for receiving text	
NEW Email			messages, all other patients with the same cell/mobile number will automatically be set to the same status, <i>All patients are orded in hy default to</i>	
_			receive text messages.	
			Clear 🔄 Continue 🚽	
	First Name Middle Name Last Name DOB Sex House No. / St City / State / Z Medical Rec. N Mom DOB † Mom First Nam Primary Conta Home Phone NEW Cell/Mob NEW Email	First Name       TESTROSS         Middle Name       EARTEST         Last Name       BARTEST         DOB       09       04       1966         mm/dd/yyyy       Sex       Male         House No. / Street / Apt. No.       City / State / ZIP         Medical Rec. No.       Mom First Name 1         Primary Contact       First Name         Home Phone       (718)         NEW Cell/Mobile       (718)	First Name       TESTROSS       Alternate First 1         Middle Name	

4. You will see a notification in green at the top of your screen indicating that your updates were successfully saved to the patient record.



If for any reason you are unable to add or update a patient's contact or demographic information, you may email the CIR for help at <u>cir-reset@health.nyc.gov</u>.











#### How to Modify Immunization Events Given by Your Facility

Add/Edit can be used in the Online Registry to modify COVID-19 and other vaccine doses administered by your facility. If you report immunizations manually using the Online Registry, this tool allows you to modify the date or manufacturer of an immunization event.

1. To modify an immunization event, first search for and select the patient record.

If the patient belongs to your practice, you can use the **MyList** screen to search for the patient. If your facility has never looked up a patient in the Online Registry, use the **Search** screen to locate the record.

See step 1 on page 1 of this guide for instructions on using Search and MyList.



Once you select the patient record, click the Add/Edit icon on the navigation bar.



- 3. Find the immunization event in the patient's record.
  - COVID-19 event used as example here. You may modify any event.

History" tab.

- Check the box next to "Modify or Delete" under the dose(s) you wish to modify.
- Click "Continue".











- 4. Modify the immunization event.
  - Θ Check "Modify Event". H1N1 Influenza 0 event/s COVID-19 🧕 Modify Event 🔍 🔘 Delete Event If necessary, change the date 1 event/s 04 1 11 / 2021 (mm/dd/yyyy) of administration. Given by this practice? O Another? COVID-19, Ad26, 0.5 mL dose (Janssen) × Lot: - Select Lot-You may also change the lot Other 0 event/s number and manufacturer. 🗧 Change Continue -Clear Click "Continue". Θ
- 5. Review the information on the confirmation screen, click "Confirm" if correct. The updated event will now be visible in the patient record.

"Cancel" to return to the patient record.)				
COVID-19	Existing Event information Date: 04/11/2021 Vaccine Name: COVID-19, Ad26, 0.5 mL dose (Janssen) Given by: This Practice	Lot Number: Not reported Manufacturer: Not reported Expiration Date: Not reported Vaccine Fund Type: Not reported		
	You are requesting to UPDATE this event. Warning: a similar immunization already exists.			
	Date: 04/11/2021 Vaccine Name: COVID-19, mRNA, 0.5 mL dose (Moderna) Given by: This Practice	Lot Number: <b>012L20A</b> Manufacturer: <b>Moderna, Inc.</b> Expiration Date: <b>12/31/2069</b> Vaccine Fund Type: <b>PUBLIC</b>		

If you are unable to modify events in the Online Registry, you may email <u>cir-reset@health.nyc.gov</u>.

You can find our other Online Registry guides for reference under the "Online Registry Guides" tab on our main webpage: <u>www.nyc.gov/health/cir</u>.











#### How to Modify Immunization Events Given by Another Facility

**Add/Edit** can be used in the Online Registry to modify COVID-19 and other vaccine doses administered by another facility, also known as historical doses. When you modify an historical dose, you will have the option to indicate if the dose was administered by your practice or another.

1. First, search for and select the patient record.

If the patient belongs to your practice, you can use the **MyList** screen to search for the patient. If your facility has never looked up a patient in the Online Registry, use the **Search** screen to locate the record.

See step 1 on page 1 of this guide for instructions on using Search and MyList.



 Click on the Add/Edit icon, then the "Modify History" tab.



- 3. Locate the immunization event you wish to modify.
  - Check the box next to "Modify or Delete" under the dose(s) you wish to modify.
  - You may modify any event. COVID-19 used as example.
  - Click "Continue".











- 4. On the next screen select the bubble next to "Delete", then click "Continue".
  - COVID-19 O Modify Event ( O Delete Event 0 Do not modify 1 event/s / 2021 / 27 04 (mm/dd/yyyy) the event on ● Given by this practice? ○ Another? COVID-19, Ad26, 0.5 mL dose (Janssen) ~ this screen. Lot: 011FAKE | Janssen Products, LP| 12/31/2069 | PUBLIC V Other 0 event/s 🗧 Change Continue -> Clear
- 5. Confirm that the information on the screen is correct, then click "Confirm".



- 6. Once the event is deleted, from the current screen click on the Adult icon.
- Welcome Kara Hoffman Facility: Citywide Immunization Re Address: 42-09 28 STREET Vaccine Θ Patient demographic information should Ouick-Add Adult Patients and Vaccinations Fill out the form below to report vaccinations for adult patients. For patients under 19 years of age, use the Search or MyList screen to look already be filled in. up and report vaccinations. For additional instructions, see Quick Guide, Online Registry Reporting COVID-19 Highlights, or Online Registry Help Guide for Pharmacists. For Vaccine Information Statements (VISs) click here (opens new window). Ð If anything is missing, **Patient Information** you can type it in here. Fields marked with \* are required First Name\* Middle Name Last Name\* TestFirst TestLast 0 The "Mother's Maiden Sex Assigned at Birth \* Date of Birth\* Name", "Mother's Date 🔘 Male 🛛 Female 🕓 Unknown 12/12/2012 of Birth", and "VFC Eligibility" fields will Mother's Maiden Name\* Mother's Date of Birth\*

Add/Edit

Tools

 TestMother
 12/12/1972

 VFC Eligibility\*
 NOT VFC ELIGIBLE

 For patients under 19 years of age, use My List if reporting immunizations other than COVID-19 or Influenza.



only show for patients

under 19 years of age.

Recall Adv. Event VIM/COVID Set Up Adult 2 Help LogOut







7. Scroll down and enter the patient's correct immunization information, including lot number.

<ul> <li>Enter the patient's race and ethnicity.</li> <li>Enter the patient's race and ethnicity.</li> <li>NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER ×   v</li> <li>Net Hispanic or Latino ×  </li> <li>Apartment/Suite</li> <li>42-09</li> <li>28th Street</li> <li>Borough/City*</li> <li>State*</li> <li>ZIP Code*</li> <li>QUEENS</li> <li>Very VORK ×   v</li> <li>Introduction Date"</li> <li>(000) 000-0000</li> <li>Mobile</li> <li>Mobile</li> <li>The "Vaccination Date"</li> <li>(000) 000-0000</li> <li>Mobile</li> <li>Mobile</li> <li>Immunization Events</li> <li>Click *Idd Event* button to enter multiple immunization events.</li> <li>Vaccination Date*</li> <li>Vaccine Administration*</li> <li>Select the correct</li> <li>COVID-19, mRNA, 05 mL dose (Modern ×   v</li> <li>Compatibility</li> <li>Priority Group</li> <li>Priority Group</li> <li>Priority Group</li> <li>Priority Group</li> </ul>		Race* Ethnicity*	
<ul> <li>Building* Street* Apartment/Suite         <ul> <li>42-09</li> <li>28th Street</li> <li>Borough/City* State* ZIP Code*</li> <li>QUEENS X V NEW YORK X V 11101</li> </ul> </li> <li>Phone* Phone Type* The mail Address mail Address</li></ul>	Enter the patient's race and ethnicity.	NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER X V Not Hispanic or Latino X V	
<ul> <li>Borough/City*</li> <li>State*</li> <li>ZIP Code*</li> <li>QUEENS</li> <li>NEW YORK</li> <li>11101</li> <li>Phone*</li> <li>Phone Type* ()</li> <li>Email Address</li> <li>(000) 000-0000</li> <li>Mobile</li> <li>I esta@health.nyc.gov</li> <li>Immunization Events</li> <li>Click *Add Event* button to enter multiple immunization events.</li> <li>Vaccine Administered*</li> <li>CoVID-19, mRNA, 0.5 mL dose (Modern ×   ~)</li> <li>Of 0002021</li> <li>CoVID-19, mRNA, 0.5 mL dose (Modern ×   ~)</li> <li>Add Lot Number</li> <li>Route of Administration*</li> <li>Ste of Administration*</li> <li>Persons aged 16:64 years with. ×</li> </ul>		Building*     Street*     Apartment/Suite       42-09     28th Street	
<ul> <li>The "Vaccination Date" field will automatically default to today. Make sure to enter the correct date.</li> <li>Select the correct COVID-19 vaccine lot.</li> <li>Methylogical for the correct COVID-19 vaccine lot.</li> <li>Phone* Phone Type* () Email Address the tot to today. Mobile × voltage</li> <li>Phone* Phone Type* () Email Address test@health.nyc.gov</li> <li>Immunization Events Click 'Add Event' button to enter multiple immunization events. Vaccination Date* Vaccine Administered* Lot* Ot/02/2021</li> <li>COVID-19, mRNA, 0.5 mL dose (Modern × voltage)</li> <li>Priority Group</li> <li>Priority Group</li> <li>Persons aged 16: f64 verst with × 1</li> </ul>		Borough/City*     State*     ZIP Code*       QUEENS     X   ~     NEW YORK     X   ~	
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<ul> <li>Select the correct</li> <li>COVID-19 vaccine lot.</li> <li>Intramuscular</li> <li>Intremuscular</li> <li>Intramuscular</li></ul>	default to today. Make sure to enter the correct date.	Immunization Events         Click "Add Event" button to enter multiple immunization events.         Vaccination Date*       Vaccine Administered*         D4/02/2021       COVID-19, mRNA, 0.5 mL dose (Modern ×   ~         Add L ot Number	
	Select the correct COVID-19 vaccine lot.	Route of Administration*       Site of Administration*       Priority Group         Intramuscular       X       Comorbidity?       Persons aged 16-64 years wit X	
<ul> <li>Enter all vaccine administration information.</li> <li>Add Event Reset Confirm</li> </ul>	Enter all vaccine administration information.	Add Event Reset Confirm	

8. When you are finished, click "Confirm". The event is now on the patient's record.

**NOTE**: You can confirm that the patient's record shows the correct immunization information by selecting the record from MyList and viewing the record.

If you are unable to modify events in the Online Registry or need additional assistance, you may email <u>cir-reset@health.nyc.gov</u>.

You can find our other Online Registry guides for reference under the "Online Registry Guides" tab on our main webpage: <u>www.nyc.gov/health/cir</u>.









# 3

### How to Update Patient Info via EHR-CIR HL7 Connection

**HL7 Connection Users** may update patient information in their electronic health record system to report to the CIR. Please check with your IT Department that the correct cell phone and email are being sent through to the CIR via your HL7 connection. You can use the Online Registry to check if entries from your EHR made it through successfully.

- 1. Update the demographic data in your electronic health record (EHR) system first. You may update:
  - a. Race
  - b. Ethnicity
  - c. Phone number/cell phone number
  - d. Email address
  - e. Current mailing address
  - f. Mother's maiden name
  - g. Middle name
- Next, submit or report to the CIR a historical or previously reported immunization record within your EHR system. Duplicate vaccinations will be ignored, but the patient's demographic information will be updated.

EMR users with an HL7 connection to the CIR can find guides for reference under the "CIR Electronic Reporting Documents" section of our webpage: <u>www.nyc.gov/health/cir</u>

For questions about HL7 interoperability, you may email <u>cir\_interop@health.nyc.gov</u>.



