

APPENDIX E TEMPLATE FOR PROVIDER GUIDANCE ON PATIENT STATUS MANAGEMENT

Note to IIS staff: This is a template of basic information that could be included in instructions to providers about the use of the patient status field. The intent is to provide a short, easy-to-understand explanation of patient status and management. Each IIS should adapt the wording to fit its own situation and terminology. It should be formatted for ease of reading. In addition, each IIS can add instructions for changing patient status, which may include use of a patient management module.

WHO IS THIS INFORMATION FOR?

This guide is intended for providers who run vaccination coverage or reminder/recall reports who want to have more accurate patient lists from the IIS and for staff responsible for updating patient status in the IIS.

WHAT IS PATIENT STATUS?

Patient status tells you which providers/practices are responsible for the immunization of a specific patient. A patient's status can be active, inactive, or deceased. In the IIS, a patient record automatically defaults to "active" for your practice when you create a new record or enter the most recent vaccination event. Patients are considered inactive when they are no longer your patients.



Definitions of patient status categories:

- Active = currently your patient
- Inactive = not your patient
- Subcategories of inactive
 - No longer your patient: if you have received requests for medical records from another primary care provider; if the patient has informed you that they have changed providers; if you know the patient has moved out of the area and no longer seeks care from you; if you have not seen the patient in x years.
 - Lost to follow-up: if you have no means to contact a patient (no phone, no address) or if you have made at least three attempts to contact a patient, after 90 days this designation can be made.
- Deceased = patient has died. (May be entered by IIS with data from Vital Records or by provider upon notification by a family member or other health care provider.)

HOW DOES PATIENT STATUS GET UPDATED IN THE IIS?

Whenever a vaccination is submitted to the IIS by your provider organization, whether by manual data entry into the IIS or electronic data submission, the patient's status is automatically updated to be "active" for your practice. Most electronic health record systems, however, are not yet capable of submitting data to the IIS when a patient moves out of the state or leaves your practice or dies. For this reason, it is important for providers to check their IIS patient records and update them for patients who have moved away, left the practice, or died.

WHY CARE ABOUT PATIENT STATUS?

It is important to update patient status so that your list of current patients is accurate, thus ensuring that reminder/recall and vaccination coverage reports are limited to patients now active in your practice. Updating your patient list on a regular basis will improve the accuracy of all reports and assist in identifying those patients who need follow-up for additional immunizations. In addition, having an accurate list ensures you are being credited for the work you do and not penalized for patients who are no longer in your practice.

WHEN SHOULD I UPDATE PATIENT STATUS?

You should update patient status routinely. Being aware of your active patients in the IIS should be a best practice for your facility. By reviewing patient status on a regular basis, you will be able to ensure that reports correctly associate patients to your practice. Patients no longer in your practice will be excluded from vaccination coverage reports and will not skew your results to be lower than they actually are. Special attention should be given to patient status prior to conducting both reminder/recall activities and vaccination coverage assessments:

- When preparing to run reminder/recall notices through the IIS, making sure your patient population is as accurate as possible ensures that the patients you contact are the right patients. This can help save you time and resources by not contacting patients no longer being seen at your practice.
- After an initial quality improvement visit from your local public health immunization team (IQIP visit), you may need or want to improve your vaccination coverage rate reports before the next visit. Updating the status of your patients will help to make sure you are including only patients who are truly active in your practice.

