Online Registry QuickGuide

**www.nyc.gov/health/cir**

Getting Connected

- **Register** with the Citywide Immunization Registry (CIR) to obtain a **facility code,** or retrieve your facility code if you have forgotten it, at: https://a816-healthpsi.nyc.gov/OnlineRegistration.

- **Account set-up:** Upon completing the required Online Registry Access forms and providing a valid email address, you will receive an email from cir-reset@health.nyc.gov with password set-up instructions and a time-sensitive link.

- **Log-in:** Go to **www.nyc.gov/health/cir** (Hint: For quick and easy access, bookmark this as a favorite.) Click on the Online Registry button (shown above left). Enter your User Name and Password in the Log On screen. Click on I Consent → to get started. Follow the instructions marked with 🟡, and tips, marked with ➲

- Look for the navigation bar, shown below. Look at the available tabs on each screen.
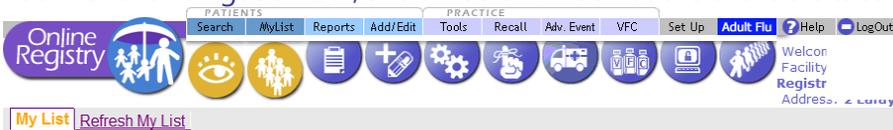
Adult

Adult quick-add screen is for the quick entry of a single immunization given to adults over 19 years of age, with the option of documenting either verbal or written consent from the patient.

For a sample consent form, visit: <https://www1.nyc.gov/assets/doh/downloads/pdf/cir/cir-hcp-adults-consent.pdf> or, on the **Adult Quick-Add** screen, click inside the Tip box, as shown below.

- Enter all required fields: name, gender, date of birth, address, the vaccine administered and vaccination date. Click, Continue →. The system will attempt to find an existing record for the patient. If a record is found, the system will prompt you to verify the record. Once the record is verified the vaccination is added to the record.

- A green confirmation will appear; example shown below. You may click on the **Add/Edit** link to enter additional vaccinations in the **Add/Edit** screen. See more **Add/Edit** details on page 3.

✔ **Philo Carpenter's** immunization was added. You may now go to Add/Edit to report additional immunizations for this patient, or continue reporting influenza immunizations for other patients below.

*(**QuickGuide** continued on next page.)*

MyList contains every record your facility has looked up and found. Click on an individual's name to quickly and easily find the record.

- **Search MyList:**
  - Search within **MyList** using the first few letters of the name.
- **View MyList:**
  - Choose the number of patients to view per page; jump to the Last Name by alphabet.
  - **MyList** can be sorted by First Name, Last Name, Gender, Date of Birth (DOB), Date Last Accessed, and color-coded Status (🟢 = up-to-date; 🔴 = past due 🟠 =due soon) by clicking on the small arrows ⌄ under each column heading.
  - **Update a patient's status as "Active" or "Inactive"** [a.k.a**. Moved or Gone Elsewhere – (MOGE)** status*] to let CIR know if the patient is no longer being seen at the practice. This feature is located in the **Active** column of **MyList**.
    - Under this column, clicking Yes/No, will bring up the **Update Patient Info** screen where you may:
      - Update address and phone numbers
      - Update patient status by choosing one of the options:
        - o Yes, patient is currently in my practice
        - o No, not in my practice (gone elsewhere)
        - o No, not in NYC (moved)
        - o No, patient deceased

        *For guidance on MOGE, please visit: www.nyc.gov/health/cir
  - **To remove patients** from **MyList and** its association with the practice, you must do **two steps:**
    1) First, update the **Active** status to "No" in the **Update Patient Info** screen.
    2) Second, remove the record from **MyList** by checking the box to the left of the patient's name in the `Remove` column, and then clicking the `Remove` icon at the top of the column.
  - Note: If step 2 is completed, but step 1 is not, the record is only removed from your view in **MyList** and remains associated with your practice.
- **Refresh MyList** use this feature to refresh (update) **MyList.**
  - Add patients you have immunized in the past who are in the CIR, but may not already be on **MyList**.
  - Add patients you have looked up but may not have immunized yet at your practice. Please note **MyList** is shared by all users at your practice.
  - Click on "Who's in MyList" to view details of the current **MyList**: , such as when and who updated the list last in your practice and the criteria they chose.

Search allows you to search the CIR for an individual's immunization record. If you cannot find an individual, and believe the individual was born in NYC after 1995, please call the CIR for assistance, at **(347) 396-2400**. You may add a patient online if the individual was born before 1996 or was born outside of NYC and you cannot find the patient.

> Please note: Participation in the CIR for people 19 years of age and older is voluntary. Providers may document either verbal or written consent from individuals 19 years and older in order to report vaccination events to the CIR. When accessing a record of an adult, a link to a sample consent form will appear in the **Add Current Immunization** screen. This form can also be found in the **Help** section.

- **Search**
  - ⟳ Fill in all four fields (first name, last name, date of birth and gender). Click **Continue ➡**
  If you are unable to find an individual's record with this option, use the Advanced Search option.
- **Advanced Search**
  - ➡ To improve your chances of finding an individual's record choose by clicking on one of the advanced search combinations in the ⟲Tip box. Type the requested additional information. Click **Continue ➡**
  If you are still unable to find the individual's record, call the CIR at **(347) 396-2400**.
- **Add New Patient**
  - ➡ To help prevent duplicate records, enter as much information as possible to add a new patient. If you have trouble adding a new patient, call the CIR at **(347) 396-2400**.
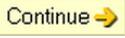

Add/Edit allows you to add all of the immunizations events you administered, as well as historical immunizations administered by you or other providers, to an individual's record. The first step is to look up the individual by using the 👁 **Search** screen or 🏈 **Adult** screen, and clicking on the **Add/Edit** icon or link. .

- **Current Immunizations** allows you to add all immunizations given to a patient at a single visit.
  - ⟳ Select the specific immunization type administered in the drop-down menus for the children's recommended vaccine series. Some of the adult immunizations are listed in the last category "**Other**." "Other" lists vaccines that are not part of children's series.
  - ⟳ You may enter an administration date
  - ⟳ Indicate patient's VFC eligibility for patients under 19 years of age. For patients 19 years of age and older, choose "Not VFC Eligible."
  - ⟳ Click ' **Continue ➡**   Next, add lot and manufacturer information (optional for adult vaccinations).
  - ⟳ Review your additions. Click **Confirm ✓**

  To have immunizations recorded in the CIR, for your convenience, a link to a sample adult voluntary consent form will appear on this screen when accessing a record of an adult.

- **Add History** shows you all previously reported immunizations for an individual and allows you to add any additional ones that you know of that were not reported to the CIR.
  - ⟳ Enter the missing immunization event(s), including date and vaccine type.
  - ⟳ Choose whether the immunization was administered by your practice or documented on a hand-held immunization record as administered by a different provider.
  - ⟳ Click **Continue ➡** then ' **Confirm ✓**.
- **Modify History** gives you the opportunity to make changes to a patient's immunization information.
  - ⟳ Choose the immunization event(s) you want to modify or delete.
  - ⟳ Choose "Modify or Delete."

- Click [Continue ➡] and make your changes. Click [Confirm ✔].
  Once you submit this information, the immunizations you reported previously will be automatically updated, while requests to modify events reported in the record by other providers will be reviewed by CIR staff who will update the child's record.

- **Disease Immunity** allows you to report and review history of varicella disease. You may also report and review disease immunity confirmed by titer or serology for hepatitis A, hepatitis B, measles, mumps, rubella and varicella.
  - **To report disease immunity**, you need to report the IgG test date. For varicella, you may report the disease date by month and year. Scroll down to view patient history.

Reports

- **View Record** When a search is successful, the individual's immunization record and lead test history are displayed. Vaccine series are located in the left column. Vaccines administered are listed from left to right, and organized by date. The **Next Due** column to the right tells you if a series is complete or indicates the date the next vaccine in the series is due. Orange bubbles 🔴 indicate that the reported dose is invalid. Click on the orange bubble for additional details. Clear bubbles indicate a note; they do not indicate that the dose is invalid.
  - Click on the printer friendly format icon 🖨 to print the record in the "grid" format.
  - **Printing Reports:**
- **Provider Reports** You may choose the filtered report to print only valid immunizations or the unfiltered report to print all immunizations reported with recommendations and comments. For patients under 19 years of age, the Lead Test History is automatically printed unless unchecked.

- **Public Report** This official report may be given to parents and legal guardians or custodians for school, the Women, Infants, and Children (WIC) program, camp, or day care. Only valid shots will be displayed. Recommendations and comments will not be displayed.

- **Request Fax**
  - Fill in the name and fax number (NYC area only) of the person to whom you are faxing the report, and click "Submit." The person will receive the report in approximately 10 minutes.

- **Update Patient Info**
  - Update the address and phone numbers of the patient if your practice has not recently done so. Add information, such as Medicaid ID, medical record number, and/or mother's maiden name, so that you can use this information in the future to search for and find this patient.
  - Indicate patients as "Active" or "No longer active" (patient left practice). Also known as Moved or Gone Elsewhere (MOGE) status.

Adverse Event
allows you to use the Online Registry to transmit a pre-populated report on an adverse event to the CDC's Vaccine Adverse Event Report System (VAERS). Follow the instruction guide found in the **Help** section of the Online Registry. You may print a copy for your records.

Recall /Reminder
allows you to identify patients who may be due immunizations. This feature allows you to send text messages, print letters and address labels, or a list of addresses and phone numbers. You may produce a Recall/Reminder list based on **MyList** or customized options. View the online *Coverage Reports Reminder/Recall* with *New: Text Messaging Guide* for details.

Tools   contain materials and features useful for your practice.

- **Immunization Schedule**
- **Coverage Report** Use this page to find out which patients are up-to-date and optionally create a Recall List for patients who need immunizations. Consider using Refresh **MyList** before running a coverage report. Print letters and address labels based on a list of patients who are not up-to-date. View the online **Coverage Reports Reminder/Recall Guide** for details.

Set-Up   contains set-up features useful for the user or the practice.

- **Default Settings**
  - You may choose settings to always start with the **Adult** immunization tab.
  - Choose settings for **MyList** to view between 10 and "all" patients.
  - You may choose how you want your list sorted, such as by Last Name.
- **Manage Vaccine Lots** Your Lot List is a customized list of the vaccine lot numbers you enter when reporting vaccinations. Each time you report an immunization event, you are asked to enter a vaccine lot number and a manufacturer. Adding the vaccine manufacturer and lot will make reporting faster, easier. The lots you add will automatically appear in the Add Immunization pick lists. By entering your vaccine lots, you can keep track of your vaccines and see when they will expire. Follow the step-by-step online instructions.
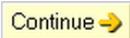- **Change Password**
 - **How to request to Reset your Password**
  - If you forget your password and/or are locked out, please contact your Site Security Administrator (SSA). Your SSA will be able to view your account and send you a link via email to reset your password. **You must provide a valid email address**. The email reset email will come from cir-reset@health.nyc.gov and will expire after **4 days**.
  - Site Security Administrators need to contact the DOHMH Security Administrator at: cir-reset@health.nyc.gov.

    Passwords must be at least 8 characters long, contain at least one number, and have at least one upper-case letter:
    1. Uppercase alphabet characters (A-Z)
    2. Lowercase alphabet characters (a-z)
    3. Arabic numerals (0-9).
       Example: reG1stry

- **Manage User** Available to Security Administrators only: Use this function to create, modify and inactivate user ID's and reset passwords for each user at your site.
  - o   **Add New User**
  - To add a new user, click the Continue ➔ button under "Add a New User."
  - Fill out the information. A valid email address is required to complete the account set-up.
  - Notify the new user that she or he will receive an email containing a link that will be valid for up to 4 days to set up his/her password.
  - For Security Group, Select "**Normal**" if you want your user to **Add/Edit** immunizations. Select, "**Read Only**," if your user will only be viewing patient immunization records and printing reports.

⊘ If the provider information needs to be updated, please contact the CIR, at **(347) 396-2400**. Click [Continue ➡] and the new user is added to the list with the ID listed to the left of the user's name.
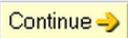
⊘ Click [Continue ➡] and the following note in green will appear at the top of the page:

> User ID <u>xxx</u> was created. Please have the user check his/her email to set the password for his/her new Online Registry account. Please be aware: (a) that there may be a delay of up to an hour for receipt of the email; and, (b) that the email will expire after **4 days**, whereupon the account will need to be set up again.

⊘ The e-mail your user needs to look for will be sent from: cir-reset@health.nyc.gov.

> Link will expire in **4 days** – please notify new user to check email promptly.

⊘ Please instruct users that passwords must contain characters from each of the three categories listed below, and must be at least 8 characters long:

> a. Uppercase alphabet characters (A-Z)
> b. Lowercase alphabet characters (a-z)
> c. Arabic numerals (0-9)

***Passwords must not be shared!** Each individual in a facility is required to have a separate password. Before assigning an ID to a new user, make sure he or she completes and signs a **User Confidentiality Statement** which you must keep on file. Do not send a copy to the CIR. (Go to www.nyc.gov/health/cir, click "For Providers," then click "Online Registry Access & Reporting" for a copy of this statement.)*

⊘ **Modify User, Reset Password**
   o In the Manage users tab, scroll down. Click on a User ID or Name to be modified.
   o Edit contact information and/or use the <u>reset password</u> link. Be sure the email address is valid.
   o Click "Continue" and a note in green will appear at the top of the page.

⊘ **Inactivate User**
   o In the Manage users tab, scroll down. Click on a User ID or Name to be inactivated.
      ▪ Next to the question: "Active User?" choose "No"
   ▪ Click [Continue ➡] and a note in green will appear at the top of the page:

- **Change My Contact Info**
   ⊘ Updating your contact information by visiting the Online Registration page: https://a816-healthpsi.nyc.gov/OnlineRegistration.

❓Help is designed to assist you in using the Online Registry. Please refer to it if you have any questions, or call **(347) 396-2400**, Monday through Friday, 9 am to 5 pm to request additional support.
You may also visit www.nyc.gov/health/cir and scroll down to the Online Registry Guides section for additional resources.

⊖LogOut
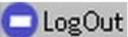
⊘ Click on the [⊖ LogOut] button when you are not using the system. For security reasons, the system will automatically log you out if idle for more than 30 minutes.

Visit Us Online! nyc.gov/health/cir **The Citywide Immunization Registry**
contact: cir@health.nyc.gov