DOCIIS 2.0

Training Modules

DC Health/Immunization Division I April 2022

Copyright 2021 DC Health | Government of the District of Columbia
Table of Contents

- Sign In/Select School
- Search for Students
- Edit Student Demographics
- Update/Add Student Address
- Update/Add Student Phone Number
- Immunization Assessment: Vaccination Forecast
- Immunization Summary: Vaccination Records
- Immunization Summary: View Vaccinations
- Vaccination Records: Add a Historical Vaccination
- Vaccination Records: View & Add Student Roster
- Vaccination Records: Student Roster
- Report: School Compliance Report
- Report: Student Compliance Report
- Report: Patient Detail
- Report: Action Report
1. Enter: https://dccp1web.stchealthops.com/iweb/ for Login Page

2. Side Bar Navigation – Drop down MAIN - select LOGIN

3. Enter USERNAME and PASSWORD - click LOGIN.

4. If you are a school nurse working multiple schools, click - CLICK TO SELECT button.

5. A Pop-up box appears to complete your selection process.
   a. Choose COUNTY. Choose “District Of Columbia”
   b. The SCHOOL DISTRICT will reflect your user credentials
   c. PUBLIC SCHOOL for DCPS user accounts; and PUBLIC CHARTER SCHOOL for PCS user accounts.
   a. Type the school’s name in the NAME field to search for a particular school
   b. Click SEARCH to show a listing of schools
   c. Click CLEAR to clear out search fields.
   d. Click CANCEL to exit select school screen.

6. The SEARCH RESULTS will populate with schools matching the criteria selected.
   a. Click on the arrow under “Select” in the far-left column.

7. Click CONTINUE to work with your selected school.
Search for students

REMINDER: A school must be selected to view the Student list.

1. After a school is selected, the Patient Search screen appears.
   a. Patients = Students.
   b. Users can also access this page by clicking on the SEARCH/ADD button in the left pane navigation under Patient Section.

2. To search for students,
   a. Enter the first name and birth date (DOB) of the student
   b. DOB: enter 2-digit Month (MM) / 2-digit day (DD) / 4-digit year (YYYY).
   Note: Users only enter in numbers for the DOB.

3. Use the % symbol after the name or initial. This will allow the system to call up all students within the search criteria chosen. The % symbol will search for multiple matches of students’ first or last names.

4. In this example, the user is going to search for all students as follows:
   a. First letter %
   b. Last name %TEST
   c. Click SEARCH for results.
   d. To view all entries, you can
      i. Expand the box SHOW -- ENTRIES, or
      ii. Use the Arrows to advance through the list of names
   e. To view individual students, click on Student’s First Name
   f. To reset the Search screen, click on Clear button.
REMINDER: Patients = Students

Users can also access this page by clicking on the DEMOGRAPHICS button in the left pane navigation under Patient Section.

UPDATING STATUS: Users can update the grade of the student within the Patient Status Screen.

STUDENT SEARCH REVIEW - EXAMPLE:

a. First letter %
b. Last name %TEST
c. Click SEARCH for results.
d. To view all entries, expand the box to SHOW – 50 –
e. ENTRIES or Use the Arrows to advance through the list of names

1. The Patient Status Page opens displaying the “Test” student’s information.
   a. Click EDIT to make any changes to the Student’s record.
   b. The EDIT screen will open. Fields in RED are required to save the changes.
   c. Click on INCLUDE ON REPORTS to ensure the student is in your school reports.

2. On this screen, you can:
   a. Add Patient Name, Sex, Race, Ethnicity and additional miscellaneous data.
   b. Add Patient Primary and Additional Address Information
   c. Add Patient Primary and Additional Phone Numbers
   d. Add Patient Primary and Additional Family & Contact Information
   e. Add Patient School Entry Date
Update/add student address

**REMINDER:** Patients = Students

Users can also access this page by clicking on the DEMOGRAPHICS button in the left pane navigation under Patient Section.

**TRAINING REVIEW: PATIENT SEARCH**

1. The Patient Status Page opens displaying the “Test” student’s information.
   a. Click **EDIT** to make changes to the Student’s Address.
   b. The **EDIT** screen will open.
   c. Fields in RED are required to save changes.
   d. The Patient Demographics Edit screen opens.

2. Go to the Address Section. In this section you can:
   a. Click **REMOVE** to delete the address completely.
   b. Click **EDIT** to make changes to the current address
   c. Click **ADD** to enter additional addresses

3. **TO EDIT:**
   a. Click **EDIT** next to the address you wish to edit.
   b. A dialog box will appear. Click **OK**.
   c. The Address section auto-fills, ready to edit.
   d. Review and edit the Valid and Primary check boxes as well

4. **TO ADD:**
   a. Click **ADD**. A blank, gray line will open under the current address.
   b. Click **EDIT** next to the blank link to enter address information.
   c. Click **UPDATE**.
   d. A dialog box appears. Click **OK**

5. Click **SAVE** after any changes have been completed.
   a. The Patient (student) Status Page opens again displaying “Patient record updated successfully”. 
REMINDER: Patients = Students

Users can also access this page by clicking on the **DEMOGRAPHICS** button in the left pane navigation under **Patient Section**.

TRAINING REVIEW: STUDENT SEARCH

a. First letter `%` - Last name `%TEST`
b. Click **SEARCH** for results.
c. To view all entries, expand the box to **SHOW– 50 – ENTRIES**, or
d. Use the **Arrows** to advance through the list of names

1. The Patient Status Page opens displaying the “Test” student’s information.
   a. Click **EDIT** to make changes to the **Student’s Phone Number**.
   b. The **EDIT** screen will open. **Fields in RED are required** to save any changes.
   c. The **Patient Demographics Edit** screen opens.

2. Go to the Phone Number Section. In this section you can:
   a. Click **REMOVE** to delete a phone number completely.
   b. Click **EDIT** to make changes to any current phone numbers.
   c. Click **ADD** to enter additional phone numbers

3. TO EDIT:
   a. Click **EDIT** next to the phone number you wish to edit. The line will highlight in yellow. Make edits.
   b. Click **UPDATE**.
   c. Continue to edit any other number listed by clicking **EDIT** next to each line, then click **UPDATE**.

5. TO ADD:
   a. You **MUST FIRST** enter the Phone Number and Phone Use Code.
   b. The Equipment Type is optional.
   c. After the information is entered, click **ADD**

6. Click **SAVE** after any changes have been completed.
   a. The Patient (student) Status Page opens again displaying “**Patient record updated successfully**”.

---

**School Nurse Module Job Aid Rev. 3/2022**
REMINDER: Patients = Students

Users can access students’ vaccine compliance information. This section alerts the User to vaccines a student is eligible for in the future and required vaccines a student has not received as of the current date.

TRAINING REVIEW: STUDENT SEARCH

a. First letter % - Last name %TEST
b. Click SEARCH for results.
c. To view all entries, expand the box to SHOW– 50 – ENTIES, or
d. Use the Arrows to advance through the list of names

1. In the left side navigation bar, Click Vaccinations to drop down the menu
   a. Click Forecast

2. The Student’s Vaccination Forecast opens. Remember, this section focuses on vaccines the student is eligible for in the future AND alerts to any required vaccine not yet received, or Past Due.

3. NOTE: Any row with a status of Past Due, indicates the student is NOT COMPLIANT for the vaccine.

4. Column Explanations:
   a. Vaccine Group: Upcoming types of vaccines student is eligible to receive.
   b. Forecasted Dose: The next expected dose of that vaccine for the student to be compliant.
   c. Recommended Date: The date student is eligible to receive the vaccine.
   d. Minimum Valid Date: The first date the student is eligible to receive the vaccine.
   e. Overdue Date: The first day when a student is considered overdue for the vaccine.
   f. Status: Indicates one of the following:
      a. The student is overdue for their vaccine and thus NOT COMPLIANT for the vaccine (PAST DUE).
      b. The student is expecting a dose (NOT YET DUE).
      c. The student is within a range for recommended-maximum valid date (DUE NOW).
REMINDER: Patients = Students

TRAINING REVIEW: STUDENT SEARCH
a. First letter % - Last name %TEST
b. Click SEARCH for results.
c. To view all entries, expand the box to SHOW 50 – ENTRIES, or
d. Use the Arrows to advance through the list of names

1. In the left side navigation bar, Click Vaccinations to drop down the menu
   a. Click Summary

2. The Summary Section opens.
   a. This section provides the dates the student received a dose of a vaccine. The numbered columns correspond to the specific dose received within the vaccination series.
   b. Some vaccine dates may be marked with a red X.
   c. The red X indicates any vaccine provided to the student outside of the recommended scheduled date. The vaccines marked “X” are invalid (improper) for the student.
      ➢ See “Invalid Vaccines”

3. Invalid Vaccines:
   a. This section explains why a vaccine is marked with an “X” under the Summary Section.

4. Deferrals:
   a. This section list if they are any delays to a student getting a vaccine.

5. Vaccine Contraindications/Exemptions/Precautions:
   a. Contraindications – conditions that prevent a student from taking a vaccine.
   b. Exemptions – conditions that exempt a student from a vaccine for religious or parental reasons.
   c. Precautions – conditions where nurses should exercise caution before providing the vaccine.
Immunization summary: view vaccinations

REMINDEr: Patients = Students

TRAINING REVIEW: STUDENT SEARCH

a. First letter % - Last name %TEST
b. Click SEARCH for results.
c. To view all entries, expand the box to SHOW– 50 – ENTRIES, or
d. Use the Arrows to advance through the list of names

1. In the left side navigation bar, Click Vaccinations to drop down the menu
   a. Click View/Add for the section to open.

2. View/Add Section
   a. Vaccination Forecast
   b. Special Consideration on Record
   c. Special Considerations and Contraindications

NOTE: Contraindications, precautions, or exemptions for students are entered by the student’s healthcare provider or DC Health.
Vaccination records: add a historical vaccination

**REMINDER:** Patients = Students

**TRAINING REVIEW: STUDENT SEARCH**

a. First letter % - Last name %TEST
b. Click SEARCH for results.
c. To view all entries, expand the box to SHOW – 50 – ENTRIES, or
d. Use the Arrows to advance through the list of names

**NOTE:** Users will only be able to enter in historical vaccines for the students.
**NOTE:** Users will not enter any contraindications, precautions, or exemptions for students.

1. View Historical Vaccine Section
   a. Column Numbers represents the Dose Number within the vaccine series.
   b. Vaccines with a red asterisk (*) AFTER the date indicates an historical vaccine.
   c. Vaccines with a red “+” AFTER the date, indicates unverified (information about the vaccine was provided but not checked).
   d. Vaccines with a red “x” BEFORE the date, indicates it was provided outside of the vaccine schedule.

2. Add Vaccines Section
   a. Add the DATE the vaccine was provided.
   b. Click ADD HISTORICALS to complete the entry.
   c. Click CLEAR to vacate the date.
   d. To use the default date, double-click on the date.
REMINDER: Patients = Students

1. In the left side navigation bar, Click Schools to drop down the menu
   a. Click Roster for the section to open.

2. School Roster Menu
   a. Select your School
   b. Click the down arrow next to Series.
   c. For this example, select ACIP RECOMMENDED VACCINATIONS
   d. To export and open a .CSV file, click Export Roster.
   e. For this example, click View Roster.
   f. The School Roster will open.

Add students

In the Student Roster screen, users can:
- Move a single student, or multiple students, to another grade.
- Remove a student from the Roster.
- Add New Student by clicking on the ADD NEW STUDENTS button.

3. Add a New Student to the Roster.
   a. Click ADD NEW STUDENTS
   b. The Patient Search screen will open.
   c. Check the box: Check here if adding new patient.
   d. All Required Fields are HIGHLIGHTED red.
   e. Click SEARCH.
   f. The SEARCH section opens with the following message:
      “Before adding, check to make sure the patient you want to add is not listed above or not pending manual review.”
   g. Click ADD PATIENT
      a. The NEW PATIENT SECTION will expand. Add information to additional HIGHLIGHTED fields:
         a. Sex
         b. Race
         c. Ethnicity
         d. Phone Number
         e. Phone Use Code
      b. Click SAVE
Vaccination records: student roster
Move or remove students

In the Student Roster screen, users can:
- Move a single student, or multiple students, to another grade.
- Remove a student from the Roster.
- Add New student by clicking on the ADD NEW STUDENTS button.

1. Move one or multiple students to another grade.
   a. Drop down the SELECT arrow.
   b. Select the grade required
   c. Click SAVE ROSTER UPDATE

2. Remove a student from the Roster.
   a. Check The Box next to the student to be removed.
   b. NOTE: If the student is removed from the School Roster, the student is still in the Immunization Registry.
   c. Click SAVE ROSTER UPDATE
REVIEW OF REPORTS

The **School Compliance Report** reveals overall compliance rate for the school.

The **Student Compliance Report** reveals the compliance status for each student.

The **Patient Detail Report** reveals listing of students and their vaccination status.

The **Action Report** reveals which vaccines for which a student is out of compliance.

1. In the left side navigation bar, Click Reports to drop down the menu
   a. Click School Reports for the reports menu to open.
   b. Click School Compliance Report.
   c. Drop down arrow next to Series. Select ACIP Recommended Vaccinations.
   d. Click the Click to Select button
   e. Select School section opens. Enter parameters.
   f. Click Search.
   g. For this example, select Adams Elementary School
   h. Click Create Report. (To export a CSV file, click Export File.)

2. Summary School Compliance Report Opens
   a. This report will reveal the vaccination compliance level for the entire school.
   b. Number of Students Overdue
   c. Percent of Students Overdue
   d. Number of Students Coming Due
   e. Percent of Students Coming Due
   f. Number of Students Compliant
   g. Percent of Students Compliant
REPORT: Student compliance report

REVIEW OF REPORTS

The **SCHOOL Compliance Report** reveals overall compliance rate for the school.

The **STUDENT Compliance Report** reveals the compliance status for each student.

The **PATIENT DETAIL Report** reveals listing of students and their vaccination status.

The **ACTION Report** reveals which vaccines for which a student is out of compliance.

1. In the left side navigation bar, Click **Reports** to drop down the menu.
   a. Click **School Reports** for the reports menu to open.
   b. Click **Student Compliance Report**.
   c. Drop down arrow next to **Series**. Select **ACIP Recommended Vaccinations**.
   d. Click the **Click to Select** button.
   e. Select School section opens. Enter parameters.
   f. Click **Search**.
   g. For this example, select **Adams Elementary School**
   h. Click **Create Report**. (To export a CSV file, click **Export File**.)

2. Student Compliance Report Opens. This report will reveal the vaccination compliance for each student.
   a. **COMPLIANT** (with vaccine schedule. Y/N)
   b. **OVERDUE** (for a vaccine – Y/N)
   c. **DUE** (for a vaccine – Y/N)
REMINDER: Patients = Students

REVIEW OF REPORTS
The SCHOOL Compliance Report reveals overall compliance rate for the school.
The STUDENT Compliance Report reveals the compliance status for each student.
The PATIENT DETAIL Report reveals listing of students and their vaccination status.
The ACTION Report reveals which vaccines for which a student is out of compliance.

1. In the left side navigation bar, Click Reports to drop down the menu.
   a. Click School Reports for the reports menu to open.
   b. Click Patient Detail.
   c. Select School section opens. Fill in the parameters. Click Search.

2. Search Results opens. Locate your school.
   a. Click the Arrow button to reveal all students, in all grades.
   b. To view one specific grade level or several, Click the Select button at the left of the results box.
   c. Then, click the Arrow button to reveal only the students in the grade(s) you selected.

   a. Top line shows how many Patients (Students) there are in the list you selected.
   b. The second line shows each Patient (Student) ID, Name, DOB, and additional information including grade.
   c. For each student, the report reveals:
      i. VACCINE NAME
      ii. VACCINATION DATE
      iii. HISTORICAL (Y/N)

Historical vaccinations: a vaccine that was administered likely in the past by a medical provider but is not recorded at time of administration. This is a manual entry that school nurses will be able to enter into the student’s vaccination record.
REMINDER: Patients = Students

REVIEW OF REPORTS

The **SCHOOL Compliance Report** reveals overall compliance rate for the school.
The **STUDENT Compliance Report** reveals the compliance status for each student.
The **PATIENT DETAIL Report** reveals listing of students and their vaccination status.
The **ACTION Report** reveals which vaccines for which a student is out of compliance.

1. In the left side navigation bar, Click **Reports** to drop down the menu
   a. Click **School Reports** for the reports menu to open.
   b. Click **Action Report**
   c. Select School section opens. Fill in the parameters. Click **Search**.
   d. Click the Arrow button next to **your school** to view all students,
      ➢ To view students from a particular grade or grades, **FIRST** click the **Select**
      button at the right of the results box.
      ➢ Check the grade or grades you want to view.
      ➢ Click the Arrow button next to school name to view those students.

   a. Vaccine Group – list of vaccines students have not yet received.
   b. Forecasted Dose – next expected dose for the student
   c. Recommended Date from ACIP schedule
   d. Minimum Valid Date they can receive the vaccine
   e. Status
      a. Past Due – Out of compliance
      b. Not Yet Due – Not yet eligible
REVIEW OF REPORTS
The SCHOOL Compliance Report reveals overall compliance rate for the school
The STUDENT Compliance Report reveals the compliance status for each student
The PATIENT DETAIL Report reveals listing of students and their vaccination status
The ACTION Report reveals which vaccines for which a student is out of compliance.

1. In the left side navigation bar, click Reports to drop down the menu
   a. Click School Reports for the reports menu to open.
   b. Click Action Report Notice/Letter
   c. Select School section opens. Fill in the parameters.
   d. Drop down the arrow next to Message. Select Immunization Requirement for this example. Click Search. (The Immunization Requirement Letter is preloaded into DCIS)
   e. Click the Arrow button next to school name to view all students,
      ➢ To view students from a particular grade or grades, FIRST click the Select button at the right of the results box.
      ➢ Check the grade or grades you want to view.
      ➢ Click the Arrow button next to school name to view those students.

   a. You can select to Run Labels
   b. You can select to Run Letter
   c. Select Run Letters for this example.
   d. The Immunization Requirement Letter is preloaded into DCIS.
   e. The Letter includes the Vaccine Group of vaccines for which a student is out of compliance.

REMINDER: Patients = Students
REMINDER: Patients = Students

REVIEW OF REPORTS
The **SCHOOL Compliance Report** reveals overall compliance rate for the school
The **STUDENT Compliance Report** reveals the compliance status for each student
The **PATIENT DETAIL Report** reveals listing of students and their vaccination status
The **ACTION Report** reveals which vaccines for which a student is out of compliance.

1. In the left side navigation bar, Click **Reports** to drop down the menu
   a. Click **School Report** for the reports menu to open.
   b. Click **Action Report Notice/Letter Messages**

   a. Click the **ADD** button for this example to create a message.
   b. Here you can create a template to use for the future, or one unique message.
   c. Next to Description, Title your message.
   d. Add your content.
   e. Click **Save**