

# CIIS IZ Quick Add Module Tutorial

The *IZ Quick Add* module may be helpful to providers holding large flu clinics or mass immunization events in response to a certain disease outbreak. It is designed to make data entry for mass events quick and easy. The *IZ Quick Add* module allows for loading of mass doses administered. On this screen, you can view and add mass event data (generally from vaccination consent forms), view details of the mass event (inventory used, location of event, etc.), and view the list of patients tied to a mass event along with their vaccination details (route, site, etc.). If you are interested in gaining access to the *IZ Quick Add* module, you will need to contact the CIIS Help Desk at [CDPHE.CIIS@state.co.us](mailto:CDPHE.CIIS@state.co.us) or 303 692-2437.

## Adding a Mass Event

**Step 1:** The *IZ Quick Add* module can be accessed from the left side of the CIIS screen in the navigation menu bar.

The *IZ Quick Add* module consists of the *Search*, *Demographics* and *Mass Events* sub-modules.

PROVIDER: TRAINING PROVIDER TYPE 2, CLINIC: TRAINING PROVIDER TYPE 2

**Search**  
Enter criteria to search for patients and click "Search" to continue.

**Search Criteria**

Patient ID	Identifier Type	Identifier Value		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Last Name	First Name	Middle Name	DOB	Gender
<input type="text"/>				

**Step 1: Locate the "IZ Quick Add" link in the navigation menu and click on it to view the associated sub-modules.**

Remember: You will need to request access to the "IZ Quick Add" module by contacting the CIIS Help Desk.

**Step 2:** Click on the “Mass Events” link on the left side of the screen and then click on the “Add New Mass Event” button to create a mass event, such as a flu clinic.

**Please Note:** The following buttons appear on a number of screens in CIIS. When selected, they perform the following actions.

- **Previous Criteria** - Restores the criteria you entered during your most recent search.
- **Clear** – Clears any fields that have search criteria in them.
- **Search** – Invokes a search based on the criteria entered.

PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US CLINIC

**Mass Events**

Enter criteria to search for mass events and click "Search" to continue. Select "Add New Mass Event" to add a new mass event. [Add New Mass Event](#) ⓘ

**Search**

Provider: IZ R US PROVIDER TYPE 3

Clinic: IZ R US CLINIC

Vaccine:  Funding Source:  Status:  Event Date Range: From:  Through:

[Previous Criteria](#) [Clear](#) [Search](#)

Step 2: Click the "Mass Events" link on the left side of the screen. Then, click on the "Add New Mass Event" button.

**Step 3:** From the “Mass Event Details” screen, you can begin adding the details of your mass event. All bolded fields are required. Only Type 3 Inventory Users will see the “Doses Available” field. All grayed-out fields will be auto-populated by the system.

**Step 4:** Click the “Update” button to save your information *or* click “Cancel” to exit the screen and not save changes.

**Remember:** *You must first enter inventory into CIIS before creating a “Mass Event.”* Users will enter the Inventory for a mass event the way they normally do (e.g., Type 2 Inventory Users enter vaccine inventory on the *Clinic Vaccine Defaults* screen located within the *Settings* module. Type 3 Inventory Users enter vaccine inventory within the *Inventory* module.)

**Mass Event Details**

Click "Create"/"Update" to save the record or "Cancel" to return to the previous page.

**When adding a new mass event, the system will default to "In Work."**

The record was saved successfully on 1/18/2013 at 3:12 PM.

Event Description	Status	Date Processed	Doses Available	Patient Count
FLU CLINIC FOR TRAINING DEMO	IN WORK		200	0

**Step 3:** From the “Mass Event Details” screen, you can add the details of your mass event. All bolded fields are required. Only Type 3 Inventory Users will see the “Doses Available” field. All grayed-out fields will be auto-populated by the system.

**Remember:** You must enter inventory first before creating a “Mass Event.”

**Step 4:** Click the “Update” button to save your information or click “Cancel” to exit the screen and not save changes.

**Vaccination Detail**

Vaccine: INFLUENZA, SEASONAL

Mfg   NDC   Brand   Lot   Exp Date (MMDDYYYY)   Funding Src   Inv Loc   Doses Remaining
PNC   49281-0390-15   FLUZONE 2012-2013 (5.0 ML VIAL)   XXXX01   12/17/2015   SPECIAL PROJECTS   IZRUS INV   200 DO

**Route/Site/Dosage**

Dosage: 0.50 | Body Route: INTRAMUSCULAR | Body Site:

The record was saved successfully on 1/18/2013 at 3:12 PM.

Once you have created the mass event, you can begin adding patients to the event from the Mass Event Details Screen.

**Step 5:** Click on the “Patient List” button to add patients. Please Note: Once patients are added to a mass event, you can also click on this button to view or edit the list of patients associated with the event.

Mass Event Details

Click "Create"/"Update" to save the record or "Cancel" to return to the previous page.

**Edit Event**

Update Cancel

Event Description: FLU CLINIC FOR TRAINING DEMO | Status: IN WORK | Date Processed: | Doses Available: 200 | Patient Count: 0 | Patient List

Provider: IZ R US PROVIDER TYPE 3

Clinic: IZ R US CLINIC

Event Date: 01/18/2013 | Administered By: TRAINER, PHYLLIS (-)

Comments: THIS CLINIC WILL BE HELD IN THE CONFERENCE ROOM

Vaccination Detail

Vaccine: INFLUENZA, SEASONAL

**Step 5:** Click on the "Patient List" button to add new patients or to view/edit patients that had already been added to an event.

**Step 6:** Click on the “Add Patient to Mass Event” button to be taken to the patient Search screen. Here you will be able to search for the patient you want to add to the mass event or add a new patient to the registry.

PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US CLINIC

Mass Event Patients

Click "Add Patient to Mass Event" to add a new patient to the event or click on the "View" button next to a patient to view the patient details.

Add Patient to Mass Event

**View All Patients**

Cancel

Event Date	Event Description	Event Status
01/18/2013	FLU CLINIC FOR TRAINING DEMO	IN WORK

Total Patients: 1

Patient ID	Last Name	First Name	DOB	Gender	Override Defaults?	
3574382	TESTING	KARA	01/03/2002	F		View

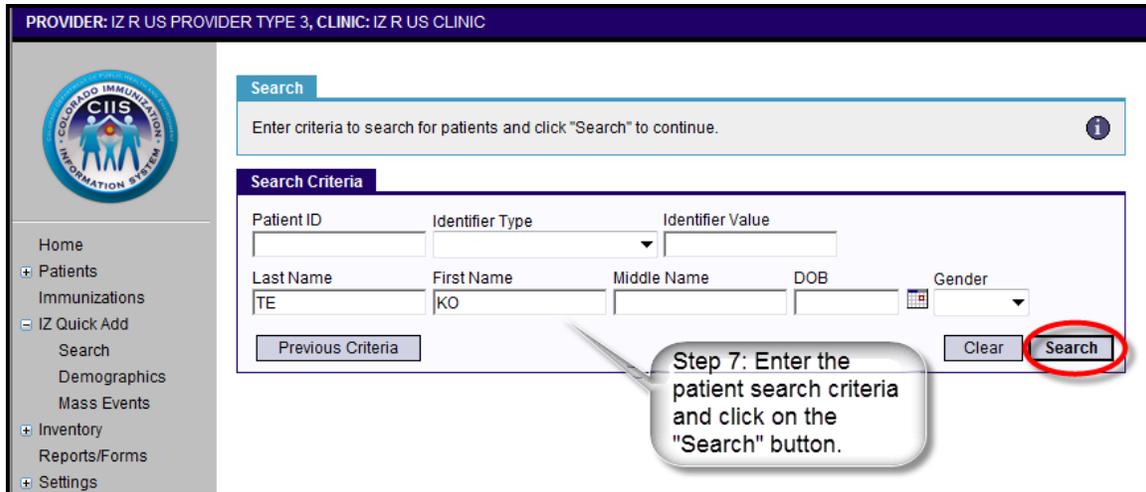
Cancel

**Step 6:** Click the "Add Patient to Mass Event" button.

Click the "View" button to view or edit patients who were already added to the Mass Event.

**Step 7:** Enter the patient search criteria and click the "Search" button.

**Search Tip:** Start with the first two letters of the first and last name. You can narrow your search by adding a date of birth.



PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US CLINIC

Search

Enter criteria to search for patients and click "Search" to continue.

**Search Criteria**

Patient ID Identifier Type Identifier Value

Last Name First Name Middle Name DOB Gender

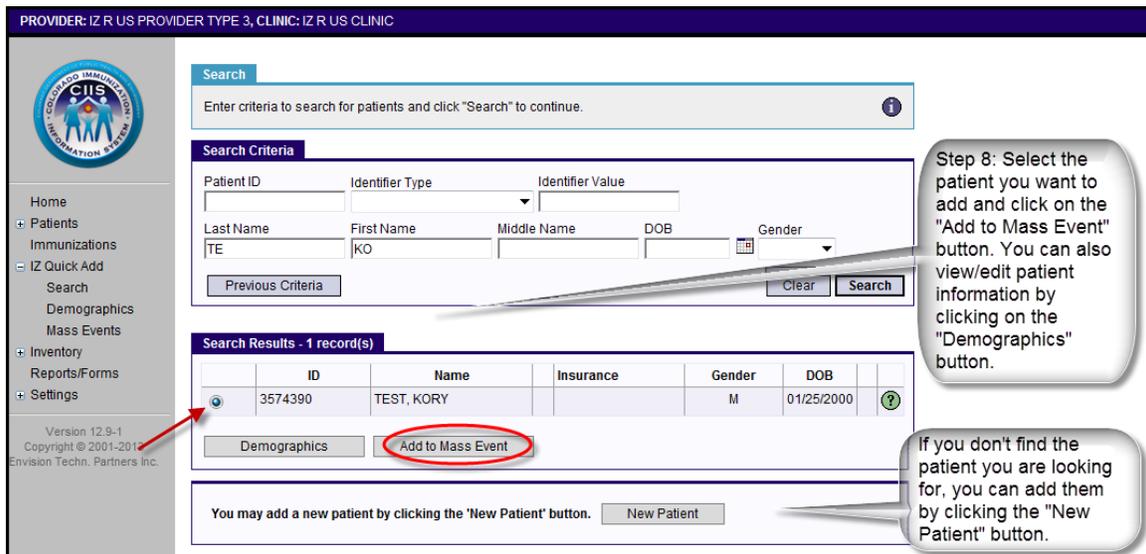
TE KO [ ] [ ] [ ] [ ] [ ]

Previous Criteria Clear **Search**

Step 7: Enter the patient search criteria and click on the "Search" button.

**Step 8:** Select the patient you want to add and click the "Add to Mass Event" button. You can also view/edit a selected patient's demographics by clicking on the "Demographics" button.

If you don't find the patient you are looking for after performing a thorough search, you can add them by clicking the "New Patient" button. (See further instructions for adding a new patient on page 8 of this tutorial.)



PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US CLINIC

Search

Enter criteria to search for patients and click "Search" to continue.

**Search Criteria**

Patient ID Identifier Type Identifier Value

Last Name First Name Middle Name DOB Gender

TE KO [ ] [ ] [ ] [ ] [ ]

Previous Criteria Clear Search

**Search Results - 1 record(s)**

ID	Name	Insurance	Gender	DOB
3574390	TEST, KORY		M	01/25/2000

Demographics **Add to Mass Event**

You may add a new patient by clicking the 'New Patient' button. New Patient

Step 8: Select the patient you want to add and click on the "Add to Mass Event" button. You can also view/edit patient information by clicking on the "Demographics" button.

If you don't find the patient you are looking for, you can add them by clicking the "New Patient" button.

**Step 9:** Click the “Create” button to save the patient’s immunization details.

CIIS will auto-populate all of the grayed-out fields; however, you can override the “Default Dosage, Body Route, Body site and/or Administered By” fields. (See the next screen for an example.)

PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US CLINIC

Mass Event Patient Edit

Click "Create"/"Update" to save the record or "Cancel" to return to the previous page.

Add TEST, KOREY (3574390) DOB: 01/25/2000 AGE: 13Y 0M 6D

Hovering over this icon will tell you who created/updated the record.

Event Date	Event Description	Event Status
01/18/2013	FLU CLINIC FOR TRAINING DEMO	IN WORK

Event Default Overrides

Default Dosage	Default Body Route	Default Body Site	Default Administered By
0.50	INTRAMUSCULAR		TRAINER, PHYLLIS (-)

Dosage: [ ] Body Route: [ ] Body Site: [ ] Administered By: [ ]

Enter any comments as necessary

Click the "Delete" button if you want to delete the patient from the event.

The system will auto-populate all of the grayed-out fields; however, you can override the "Default Dosage, Body Route, Body Site and/or Administered By" fields. See the next screen for an example.

Step 9: Click the "Create" button to save the patient's immunization details.

Click the "Cancel" button to exit the screen without saving any changes.

*Example of Overriding the Default Fields. Because of this patient’s age, the default “Dosage” and “Body Site” were Changed to 0.25 and Left Anterior Thigh.*

Mass Event Patient Edit

Click "Create"/"Update" to save the record or "Cancel" to return to the previous page.

Add QUIZ, IGOR (3574383) DOB: 01/04/2012 AGE: 1Y 0M 27D

Event Date: 01/18/2013, Event Description: FLU CLINIC FOR TRAINING DEMO, Event Status: IN WORK

Event Default Overrides

Default Dosage	Default Body Route	Default Body Site	Default Administered By
0.50	INTRAMUSCULAR		TRAINER, PHYLLIS (-)

Dosage: 0.25 Body Route: [ ] Body Site: LEFT ANTERIOR THIGH Administered By: [ ]

Comments: DOSAGE AND BODY SITE CHANGED DUE TO PATIENT'S AGE.

Click the "Create" button to save the record. Next, click the "Cancel" button to return to the Patient List.

Due to the patient's age, the "Dosage" and "Body Site" were changed.

You will notice when viewing the list of all patients added to the mass event, a red exclamation signifies that the patient has override(s). Hovering your mouse over the exclamation will tell you the specific fields that were overridden.

The screenshot displays a software interface for managing mass event patients. At the top, there is a section titled "Mass Event Patients" with a button "Add Patient to Mass Event" and an information icon. Below this is a "View All Patients" section containing a table with columns "Event Date", "Event Description", and "Event Status". The table shows one event: "01/18/2013" for "FLU CLINIC FOR TRAINING DEMO" with status "IN WORK".

Below the event table, it states "Total Patients: 2" and shows a list of patients with columns: "Patient ID", "Last Name", "First Name", "DOB", "Gender", "Override Defaults?", and "View".

Patient ID	Last Name	First Name	DOB	Gender	Override Defaults?	View
3574383	QUIZ	IGOR	01/04/2012	M	!	View
3574382	TESTING	KARA	01/03/2002	F		

A tooltip points to the red exclamation mark in the "Override Defaults?" column for patient 3574383, stating: "Patient has override(s) for: dosage, body site".

## Adding a "New Patient" to a Mass Event

If you have a patient who does not have an immunization record in CIIS, you will first need to create a record for them in the registry before adding them to the mass event. The *IZ Quick Add Module* allows you to add a new patient by entering a minimal amount of data. See the following screen shots for instructions.

**Step 1:** Click on the "New Patient" button to add a new patient to a mass event.

PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US CLINIC

**Search**  
Enter criteria to search for patients and click "Search" to continue.

**Search Criteria**

Patient ID	Identifier Type	Identifier Value		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Last Name	First Name	Middle Name	DOB	Gender
TE	KO	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Search Results - 0 record(s)**

There are no patients that match your search criteria.  
You may add a new patient by clicking the 'New Patient' button.

**Step 1:** Click on the "New Patient" button to add a new patient to a mass event.

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**Step 2:** Complete all of the fields in bold text. Next, click the "Create" button and you will be taken to the *IZ Quick Add Demographics* screen which allows for minimal data entry of demographic information.

PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US CLINIC

**Patients New**  
Click "Create" to create a new patient.

**Add**

Last Name	First Name	Middle Name	Generation
TENNER	KORINA	<input type="text"/>	<input type="text"/>
DOB	Gender	SSN (Last 4)	
01/25/2009	FEMALE	<input type="text"/>	
Mother Maiden	Mother First	<input type="text"/>	

**Step 2:** Enter the new patient's information and click on the "Create" button.

**Step 3:** Enter the patient's demographic information and click the "Update" button to save the record.

**Step 4:** Next, click the "Cancel" button to be navigated back to the *IZ Quick Add* screen, where you can now add the patient to the mass event.

Demographics

Here is an example of the *IZ Quick Add Demographics* screen.

Click "Update" to save the record or "Cancel" to return to the previous page.

Edit TEST, KORINA (3574391) DOB: 01/25/2009 AGE: 4Y 0M 0D

Record saved on 1/25/2013 at 2:03:20 PM.

**Update** Cancel

**Patient Information**

Last Name First Name Middle Name Generation  
TEST KORINA

DOB Gender Part Of Multiple Birth? Home Phone  
01/25/2009 FEMALE

**Mailing Address**

Address is Unavailable or Temporary

Street # Prefix Street Name Type Suffix Unit# P.O. Box  
000 TESTING

City Out of State City County Out of State County  
ENGLEWOOD ARAPAHOE

State Country Zip Code  
COLORADO 80000

**Guardian**

Last Name First Name Middle Name Generation Relationship Type

**Mother**

Maiden Name Last Name First Name Middle Name

**VFC Eligibility and Health Insurance**

VFC Eligibility  
(2) VFC-NO INSURANCE

Health Insurance Source Health Insurance ID Date Last Verified

Record saved on 1/25/2013 at 2:03:20 PM.

**Update** **Cancel**

Step 3: Enter the patient's demographics information. All of the bold text fields are required. Next click on the "Update" button.

Step 4: Click the "Cancel" button to be navigated back to the "IZ Quick Add" screen, where you can add the patient to the mass event.

**Step 5:** Click on the “Add to Mass Event” button.

**IZ Quick Add**

This is your central location for navigating through a patient record. Click any of the buttons at the bottom of the screen to continue.

**Currently Selected Patient**

ID	Name	Gender	DOB
3574391	TEST, KORINA 000 TESTING ENGLEWOOD, CO 80000	F	01/25/2009

Buttons: Demographics, Add to Mass Event

**Step 5 :** Click on the "Add to Mass Event" button.

**Step 6:** Click the “Create” button to save the patient’s immunization details.

The system will auto-populate all of the grayed-out fields; however, you can override the “Default dosage, Body Route, Body Site and/or Administered By” Fields.

**Mass Event Patient Edit**

Click "Create"/"Update" to save the record or "Cancel" to return to the previous page.

**Add**

Hovering over this icon will tell you who created/updated the record.

Event Date	Event Description	Event Status
01/18/2013	FLU CLINIC FOR TRAINING DEMO	IN WORK

**Event Default Overrides**

Default Dosage	Default Body Route	Default Body Site	Default Administered By
0.50	INTRAMUSCULAR		TRAINER, PHYLLIS (-)

Fields: Dosage, Body Route, Body Site, Administered By

Comments: Enter any comments as necessary.

Buttons: Delete, Create, Cancel

The system will auto-populate all of the grayed-out fields; however, you can override the "Default Dosage, Body Route, Body Site and/or Administered By" fields.

**Step 6:** Click the "Create" button to save the patient's immunization details.

Click the "Delete" button if you want to delete the patient from the event.

Click the "Cancel" button to exit the screen without saving any changes.

## Submitting the Mass Event for Overnight Batch Processing

Once you have added all of the patients to the mass event, the last step is to submit the event to CIIS for processing. CIIS will process the event overnight, at which time it will add the vaccines to the patient records and decrement inventory for Type 3 Inventory providers. To submit the mass event to CIIS for processing, follow these steps:

**Step 1:** Select the *Mass Events* sub-module from the *IZ Quick Add* module so that you can search for previously entered mass events. Next, enter your search criteria. You can search by Vaccine Type, Funding Source, Status and/or Event Date Range. **Note:** To search for all mass events entered by a provider/clinic, leave the search criteria fields blank.

**Step 2:** Click the “Search” button to view your search results.

PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US CLINIC

Mass Events

Enter criteria to search for mass events and click "Search" to continue. Select "Add New Mass Event" to add a new mass event.

Search

Provider: IZ R US PROVIDER TYPE 3

Clinic: IZ R US CLINIC

Vaccine: [ ] Funding Source: [ ] Status: [ ] Event Date Range: From: [ ] Through: [ ]

Previous Criteria Clear Search

Step 1: Add your search criteria. To search for all mass events entered by a clinic, leave the search criteria fields blank.

Step 2: Click the "Search" button to view your search results.

The screen displays previously entered mass events that match the search criteria.

**Step 3:** Locate the event you want to submit and click the “View” button.

PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US CLINIC

Mass Events

Enter criteria to search for mass events and click "Search" to continue. Select "Add New Mass Event" to add a new mass event.

Search

Provider: IZ R US PROVIDER TYPE 3

Clinic: IZ R US CLINIC

Vaccine: [ ] Funding Source: [ ] Status: [ ] Event Date Range: From: 01/18/2013 Through: 02/01/2013

Previous Criteria Clear Search

Event Description	Event Date	Vaccine	Funding Source	Patient Count	Status	Date Processed	Processing Errors	
IZ R US PROVIDER TYPE 3 - IZ R US CLINIC								
FLU CLINIC FOR TRAINING DEMO	01/18/2013	Influenza, Seasonal	Special Projects	2	IN WORK			 View

For this example, the user searched by the "Event Date Range."

Step 3: Click the "View" button to view more details about the mass event.

Hovering your mouse over this icon, tells you who created the mass event.

**Step 4:** From the “Status” drop-down box, select “Submitted.”

**Step 5:** Next, click on the “Update” button to save your changes. The system will process the mass event overnight.

The screenshot shows the 'Edit Event' form in the CIIS system. The form includes fields for Event Description, Status, Date Processed, Doses Available, and Patient Count. The Status dropdown menu is open, and 'SUBMITTED' is selected. A callout box points to this selection with the text: 'Step 4: Select "SUBMITTED" from the drop-down box.' Another callout box points to the 'Update' button with the text: 'Step 5: Click the "Update" button to save your changes and submit the event for processing.' A third callout box on the right side of the form states: 'CIIS will perform an overnight batch to process all of the vaccines administered during the mass event. CIIS will also decrement inventory for Type 3 Inventory Providers.' The form also includes sections for Vaccination Detail and Route/Site/Dosage.

*Example of the Mass Event Screen after Overnight Batch is Run*

Once CIIS completes the overnight batch run, the "Status" of the event appears as "Processed." At this point, all vaccines that were administered during the mass event have been added to the patient immunization records. In addition, the system defaults to documenting the current VIS edition date on the patient immunization records. For Inventory 3 providers, the "Doses Available" has been decremented. **Note:** Once the mass event has been processed, you can no longer add patients to the event.

PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US CLINIC

Mass Event Details

Click "Create"/"Update" to save the record or "Cancel" to return to the previous page.

**Edit Event**

Event Description: FLU CLINIC FOR TRAINING DEMO | Status: PROCESSED | Date Processed: 02/08/2013 | Doses Available: 198 | Patient Count: 2 | **Patient List**

Provider: IZ R US PROVIDER TYPE 3 | Clinic: IZ R US CLINIC

Event Date: 01/18/2013 | Administered By: TRAINER, PHYLLIS (-)

Comments: THIS CLINIC WILL BE HELD IN THE CONFERENCE ROOM

Vaccination Detail

Vaccine: INFLUENZA, SEASONAL

Mfg | NDC | Brand | Lot | Exp Date (MM/DD/YYYY) | Funding Src | Inv Loc | Doses Remaining  
 PNC | 49281-0390-15 | FLUZONE 2012-2013 (5.0 ML VIAL) | XXXX01 | 12/17/2015 | SPECIAL PROJECTS | IZRUS INV | 198 DO

Route/Site/Dosage

Dosage: 0.50 | Body Route: INTRAMUSCULAR | Body Site:

Once the mass event is processed, the "Status" field will change to "Processed" and the "Doses Available" will appear *ONLY* for Inventory Type 3 providers.

By clicking on the "Patient List" button, you can view all of the patients that were added to the mass event.

To return to the *Mass Events Search* screen, click on the "Cancel" button.

*Example of a Patient List After the Mass Event Has Been Processed.*

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444886	ROTH	MEREDITH	09/25/2006	F	!	?	View
444712	ROTH	NICHOLAS	12/19/1979	M	!	⚠	View

Duplicate vaccination for this patient on same day.

Once the mass event has been processed if you see this icon next to a patient's name on the "Patient List," it signifies an error. Hovering over this icon will provide a description of the error. **Note:** You *cannot* resubmit a mass event. To correct an error, you will need to review the patient's record outside of the *Mass Events* screen using the *Search* functionality within the *Patients Module*.