

# Reconciling Outside Immunizations

External Immunization information is sent to us from the following sources:


- Iowa's Immunization Registry Information System (IRIS).
- Epic Institutions via Care Everywhere.
- Non-Epic Institutions (VA, IHIN & CareQuality) via Care Everywhere interface.

Outside immunizations must be reconciled with our chart to calculate Health Maintenance topics and view them in reports and activities.


## Querying Immunization Information from IRIS

Sign into patient's current **Encounter**.

1. Click **Immunizations**.


The **Immunizations** activity may be hidden under the more  drop-down menu.

2. Review when info last came from IRIS.

 For all outpatient visits, Epic will automatically query IRIS as soon as the patient is checked in to the visit.

For inpatient stays, Epic will automatically query IRIS once upon admission.

3. If info from IRIS is older than today, then click on **Imm Registry**.

 Epic will only automatically query IRIS 7 days after the last successful query, but manual queries can be triggered at any time.

The Immunization registry window appears:

4. Click **OK**.

If any immunizations have been received from an outside source, the **New immunizations from outside sources** warning appears.

Anything from IRIS will show in the **Immunizations from immunization registries** section.

### Outpatient View

### Inpatient View

## Reviewing Outside Immunizations to Reconcile

From the **Immunizations Activity**:

- A. **Administration History**: Immunizations documented in our medical record.
- B. **Immunizations from Immunization Registries**: All Immunizations reported by IRIS.
  - a. **Administered At** - Lists reporting institution. If number, then this is IRIS institution number.
  - b. **Notes** - Take note of immunizations which say 'Historical information', we will NOT want to add to our records if our information is more accurate.

To begin reconciliation:

1. Click **Go Reconcile**.

## Adding Outside Immunizations NOT in Epic

The Reconcile Outside Info activity appears:

1. Click the desired New Immunization to review.
2. Click the desired Current Immunizations to compare against (verify that one doesn't already exist).

**i** Immunizations with unspecified in the immunization name are less specific than other entries and should be thoroughly reviewed.

3. Click Add **+**.

**i** ALWAYS verify date to make sure immunization is not already in our medical record before deleting.

NEVER add immunizations that will override more accurate information currently in our medical record. Merging is ok as it will update our records.

NEVER use the Add All button.

**!** Immunization records may be reported by the patient via MyChart. Therefore, we want to verbally verify the exact date that the vaccination was administered with the patient before reconciling into the patient's chart.

The Immunization is now added to our medical record.

4. When finished, click **Accept**.

**i** Only click Accept when finished reconciling all of the immunization information.

## Reconciling Outside Immunizations Already in Epic

From the Reconcile Outside Info activity:

1. Click the New Immunization to review.
2. Click the Current Immunization to compare.
3. Review details of like immunizations.

**i** Immunizations with unspecified in the immunization name are less specific than other entries and should be thoroughly reviewed.

ALWAYS verify date to make sure immunization is not already in our medical record before deleting.

NEVER add immunizations that will override more accurate information currently in our medical record. Merging is ok as it will update our records.

Date	Received	To be saved as	Dose	Manufacturer	Lot #	Source
2/5/2015	Tetanus Toxoid, adsorbed	Tetanus Toxoid, adsorbed		Sanofi Pasteur	12345	Organization: 1000005

4. Click Desired action button.

**Merge** when outside information provides more details than our current record holds.

**Add as New** immunization when you are unable to determine if outside records match our current records. Merge is the preferred option when you're certain the records match.

**Discard** the outside immunization when it doesn't provide any new details to our current chart.

**i** ALWAYS verify date to make sure immunization is not already in our medical record before deleting.

NEVER add immunizations that will override more accurate information currently in our medical record. Merging is ok as it will update our records.

Date	Dose	Manufacturer	Lot #
2/5/2015			

The Immunization record is now updated.

5. When finished, click **Accept**.

**i** Only click File and Close when finished reconciling all of the immunization information.

**Reconcile Outside Info**

Allergies Medications **Immunizations**

Outside of Local Medical Record

Immunization Reconciliation History

Administered On

New Immunizations

			Influenza, quadrivalent nasal	New	8/3/2017	
			Influenza, quadrivalent PF	New	11/17/2018	

Current Immunizations in Local Medical Record (After Changes Are Filed)

Immunization	Administered On			
Influenza, nasal	8/3/2017			
	Date	Dose	Manufacturer	Lot #
	8/3/2017	0.2 mL	Aventis Pasteur	235235
Influenza, PF	7/9/2014			
<b>Influenza, quadrivalent PF</b>	<b>11/17/2018</b>			
Td, adsorbed	8/8/2015, 7/9/2014			

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Accept/Next Accept Cancel

It is possible to remove historical immunizations if necessary from the Reconcile Outside Info activity by clicking the **Delete** button.

This will NOT be an option for immunizations that have been charted as given on the Medication Administration Record (MAR).

**Reconcile Outside Info**

Allergies Medications **Immunizations**

Outside of Local Medical Record

Immunization Reconciliation History

Administered On

New Immunizations

			Zoster, live (Zostavax)	New	11/20/2015	
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Current Immunizations in Local Medical Record (After Changes Are Filed)

Immunization	Administered On			
Hepatitis B, adult	9/15/2020, 8/16/2020			
	Date	Dose	Manufacturer	Lot #
	9/15/2020	20 mcg	GlaxoSmithKline	52415
	8/16/2020	20 mcg	GlaxoSmithKline	85475
Influenza, PF	6/7/2014			
Influenza, unspecified nasal	7/2/2017			
Td, adsorbed	7/7/2015, 6/7/2014			

Accept/Next Accept Cancel

**Questions?** If you need Epic assistance, please contact the Health Care Information Systems Help Desk at 6-0001.