MCIR USER REFERENCE GUIDE:

PERSON MODULE

Table of Contents:

Information and instructions included in this reference guide periodically change with system updates and are subject to annual review. Please be advised: Images and directions may no longer replicate current system function.

ADD/FIND PERSON

Search for Person

To search for a person's MCIR Record, select **Add/Find** from the Person section of the MCIR home Page.
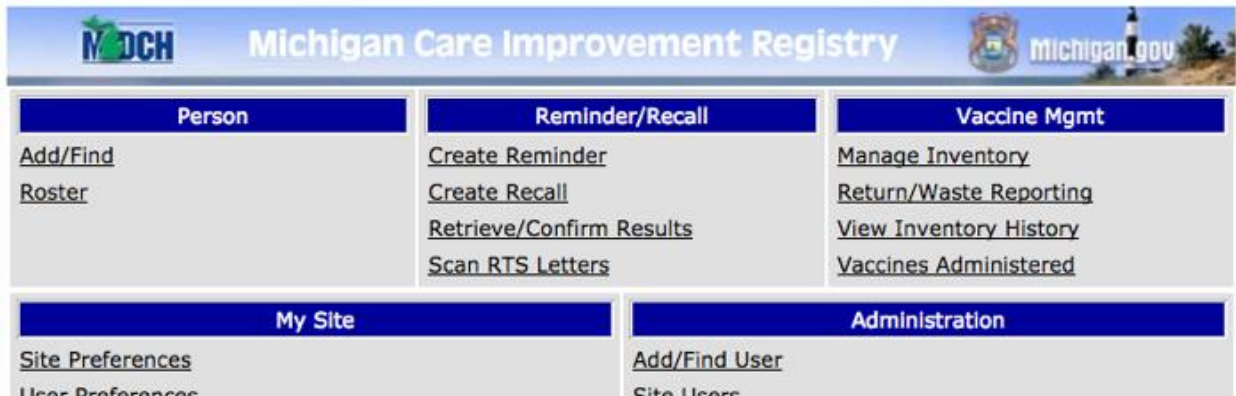
The system will navigate to the **Find Person** Screen.

From the **Find Person** screen, use any of the following criteria to search for a person:

- Person's Last Name <u>or</u> First Name <u>and</u> Date of Birth (mm/dd/yyyy)
- MCIR ID only, if known
- A Wildcard search - Reference the <u>Using a Wildcard Search</u> section of this document, directly below.
- Enter a different set of demographics for the person (i.e., Try searching with the person's First Name or Alias Name in place of the person's Last Name).

Enter the above information, then click the **Search** button. If your initial search attempt is unsuccessful, clear the **Find Person** screen and try again using different search criteria.

Search/Find a Person Reminders:

1. The **Gender** and **Multiple Birth Status** fields are not recommended search criteria and may be too vague to result in a specific person's record match.
2. Ensure you search using the person's full first and/or last name, as stated on their birth certificate.
3. It is possible to search for a person's record by the **Patient ID**, **Medicaid ID** and/or **WIC ID** field(s) only, if known.

Using the Wildcard (*) Search

The Wildcard Search method can be used to broaden a person search when a previous **Find Person** search is unsuccessful.

To use the Wildcard Search, replace one or more characters in the person's name with an asterisk. A Wildcard Search can be used at the beginning, in the middle and/or at the end of a person's name. For example:
- Jacquelyn could be spelled Jacqueline, Jaclyn, Jacklyn, etc. (search as J*)
- Devont<u>e</u> vs Devont<u>ae</u> or Davont<u>a</u> (search as Devont* or *vont*)
- Mc<u>L</u>aughlin vs Mc<u>Cl</u>aughlin (search as *Laughlin)
- If the name is listed as Juan-Castro Amaro-Alvarez III try a wildcard search of:
  - *Amaro* or *Alvarez* in the Last Name, or
  - *Juan* or *Castro* in the First name

Benefit of the Wildcard Search:
- Allows the user to search for a person's record with variations to the known search criteria.
- Helps prevent the creation of duplicate person records

Finding a MCIR Record

Person Found

The **General Information** screen will appear once the system finds a match to the personal data you entered.

More than One Person Found

If more than one person is found:

- choose appropriate person from list
- click **Search Again** if the appropriate person does not appear in the list, or
- add the person, if not found.

If duplicate records are discovered on the list of multiple persons meeting the search criteria, please refer to the MCIR Reference Guide: Reporting Duplicate Person Records for instructions on reporting the duplicates.

Person Not Found

There are multiple reasons why a person's record may not be found or retrievable:

Opted Out of MCIR

Person you are searching for has a MCIR record but is currently **Opted Out (Not Participating)** in MCIR: The individual or the individual's parent/guardian has requested the MCIR record be locked from access and immunization reporting.

Deceased

Person has been Reported as **Deceased:** Once a Person has been reported as Deceased, the record is no longer accessible.
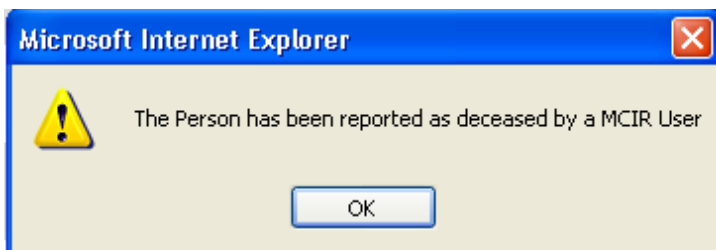
Additional Reasons Person Not Found

1. The person does not have a MCIR record. We will discuss **Add Person** on the next page.
2. The information being used to search does not match the information recorded in the person's record.
3. The information in the person's record is recorded incorrectly.

Please contact your Regional MCIR office if you require assistance: locating a person's record, performing an Opt Out or Rescind to a previous Opt Out, and/or with a record you believe is incorrectly marked as deceased.

Add Person

If the person does not have a MCIR record, the **Person Not Found** error message will be received. You must perform two searches in MCIR before the system will allow you the option to **Add Person**. If you do not receive the **Add Person** pop-up after two consecutive searches, you may need to adjust your browser settings to allow for pop-ups from MCIR.

Note: A Wildcard Search will not result in the option to **Add Person**.
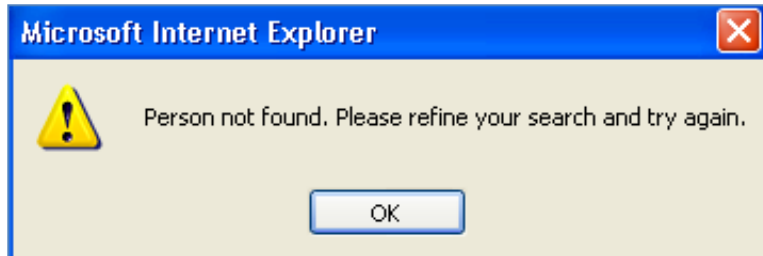
Step One: If your Person Search yields no result, you may add the person to MCIR if:

- they were born outside of Michigan, *and/or*
- they were born prior to January 1, 1994
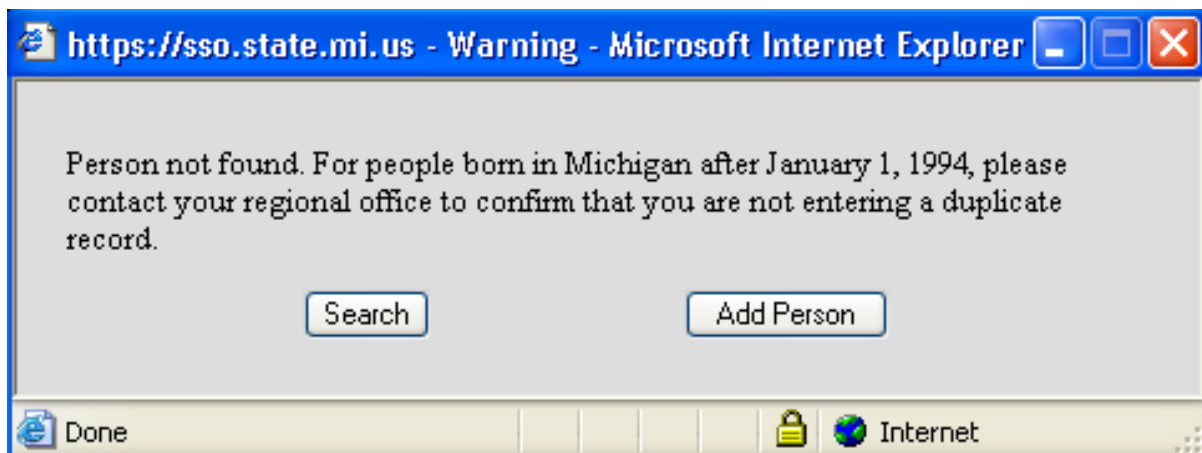
If the person was born in Michigan on or after January 1, 1994, please contact your Regional MCIR Office BEFORE creating a new record.

Step Two: Click the **Add Person** button to be presented with the **Add New Person** screen. You will need to complete all required fields to submit the Add New Person form (i.e., create a new MCIR record). You should complete as much information as possible on the **Add New Person** form. Note: Some fields are required to create a new record. Required fields are indicated by an asterisk (*).

Add New Person						**Print Help**
						Home Exit

Person	Rem/Rcl	Sch/CC	Imp/Exp	My Site	Adm	Rpts	Oth

Add/Find Roster Deduplication Vaccine Deduplication Information Status History

Personal Information:

Legal Last*		Legal First*		Middle		Jr / Sr /..	
Alias Last		Alias First		Mother's Maiden Name			
Birthdate*		Gender*		☐ Multiple Birth			

Birth Facility Information:

Name		State		County	

Person's IDs:

Patient ID	

Responsible Party Information (for Reminder and Recall Notices)

Last Name*		First Name		Middle		Suffix	
Country*	United States						
Street*							
City*		State*	MI	Postal Code*			
Phone	( ) -						

Options

☑ Add to site roster	☑ Send immunization notices	Language	English

All fields marked with * are mandatory	Submit	Cancel

PERSON RECORD

The following information pertains to viewing a person's record. The person record contains three main screens:

- Information
- Status
- History

Each screen is described in greater detail below. To access the appropriate screen, click on the available link from the top of the person's record.
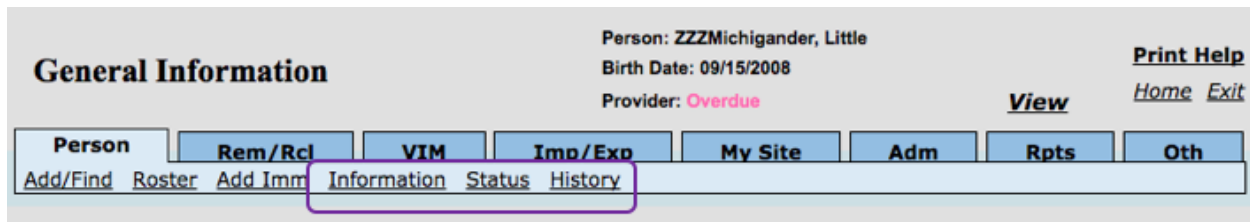
Information Screen

The **Information** screen provides an overview of the person, including the following details:

Person Information	This section pertains to the person's demographics (personal information). Please reference the Editing a Person section of this reference guide for instructions on making updates or changes to **Person Information**.
High Risk Conditions	There are two **High Risk** indicators available on a person's record: • **Influenza Screening Notification:** available on all persons' records • **Pregnancy**: available only on records for females 12 years of age (144 months) and over
Immunizations Tab	The **Immunizations tab** includes a quick overview of the person's current immunization status, including: • vaccine **Series**, with date for each **Dose** • **Status**: **Complete**, **Due Now** or **Next Due** (date) • **Other Administrations**: vaccines received but not included in recommended/routine vaccine per age) • **Non-Administered Doses/Positive Immunity** • **Compromise Doses** • **Invalid Doses**

Public Health Programs' Screening Tabs	Depending on the age of the person, their record may display test results for the following Michigan Department of Health and Human Services' programs' health initiatives: • NBS: Newborn Screening • BMI: Body Mass Index* • EHDI: Early Hearing, Detection & Intervention • EPSDT: Early and Periodic Screening, Diagnostic and Treatment • Lead: Blood Lead Levels For additional information on the data contained in these tabs, please refer to the Non-Immunization Tabs Available to Certain Users document. * **Person Requested the Disabling of BMI Module** flag is accessible from the person's **General Information** screen, by clicking on the **Edit** link in the **Person Information** section.
Other Tab	This tab displays additional information pertaining to the person. Please reference the Editing a Person section of this reference guide for instructions on making updates or changes to **Person Information**.

Status Screen

The person's **Status** screen displays an **Accelerated**, **Recommended** and **Overdue** immunization schedule (for the person). These immunization statuses are based on:

- the immunizations already reported to the person's MCIR record, and
- assessed per the Advisory Committee on Immunization Practices (ACIP) vaccination schedules.

History Screen

The person's **History** screen displays medically verified vaccinations added to the person's record by a medical facility.

The History screen can be viewed in 3 formats:

The **Vaccine Series History Format** displays the person's immunization history in chronological order by vaccine series.

The **Date Administered History Format** displays the person's immunization history in chronological order by date of administration, starting at birth.

The **Vaccine/Date Summary History Format** displays the person's immunization history by Vaccine Series and Dose date.

Things to Know about the **Vaccine/Date Summary History Format**:

- This immunization history format does not display the individual vaccine formulations administered and therefore should <u>not</u> be used when determining which formulation to administer for due/overdue doses.
- Although **Y Button** vaccine administrations are highlighted in yellow, the reason the administration is considered compromised or invalid can only be viewed in the **Vaccine Series History Format** or the **Dates Administered History Format**. For more information on the **Y Button**, see directly below.

History Screen's Y Button

On the person's History screen, those reported immunization administrations that are considered Compromised or Invalid will display with a Y Button. Hovering the computer's mouse over the Y Button will produce a "key" indicating the concern with the reported administration.

OFFICIAL MCIR RECORD

There are four formats for viewing and printing a person's MCIR record. All four versions are considered Official immunizaion records for the State of Michigan.

- Official State of Michigan Immunization Record (2 pages)
- Official State of Michigan Immunization Record - Landscape (1 page)
- 1 Page – Official State of Michigan Immunization Record with Address
- 1 Page – Official State of Michigan Immunization Record without Address

Viewing the Official MCIR Record

Step One: In the upper right corner of the person's **Information**, **Status**, **History** or **Add Imm** screen, click on the **View** link.

Step Two: A pop-up window should appear, allowing you to choose the record format you wish to view/print. There will be a checkbox next to the format currently defaulted under your User Preferences. For more information on User Preferences, please refer to the MCIR User Reference Guide: My Site.

Step Three: Select the record version to view/print and click Submit.

Step Four: The record type selected will open in a PDF format. If you experience issues viewing the PDF file, please click on the Print Help link in the upper right corner of your MCIR screen.

Printing the Official MCIR Record

Click the Printer icon. The icons position may vary depending on the computer's format.

EDIT PERSON RECORD

Editing Person Information

The following data fields can be edited from a person's **General Information** screen:

- Alias Last (name)
- Alias First (name)
- Mother's Maiden Name
- Birth Facility Information
- Patient ID
- Responsible Party/Address Information
- Multiple Birth Status

Data fields displayed in gray on a person's **General Information** screen cannot be edited by general system users. For information regarding correcting the below data fields, please refer to the **Petition for Modification to a MCIR Record** section of this reference guide.

- Legal Last (name)
- Legal First (name)
- Middle (name)
- Suffix (name)
- Date of Birth
- Gender

Editing Immunization Data

From the person's immunization **History** screen, you can edit vaccine encounters which your office has reported. This includes data your office has reported as Historical/Other Provider data.

Step One: Click on the hyperlink under the vaccination you want to edit.

Step Two: The **Edit Immunization History** screen will appear.

Date Administered*	11/30/2012 📅		☑ List as point of contact for reminder/recall notices
Vaccine*	IPV (polio)		
Mfr (Product)*	sanofi (IPOL)		
Lot Number	H1330* (Expires: 06/22/201		**Enter Lot Manually**
Vaccine Eligibility*	Private Pay/Insurance		Dose Qty (ml)*	0.5
Site on Body	Left Thigh		Route	Intramuscular

Step Three: From the **Edit Immunization History** screen, you can modify:
- Date Administered
- Vaccine
- Manufacturer
- Lot Number
- Site on Body
- Vaccine Eligibility
- Dose
- Route
- Point of Contact for Reminder/Recall Notices

Step Four: Non-Administrations must be edited from the person's **History** screen.

Step Five: Once the required modifications have been made, click the **Submit** button to save your changes.
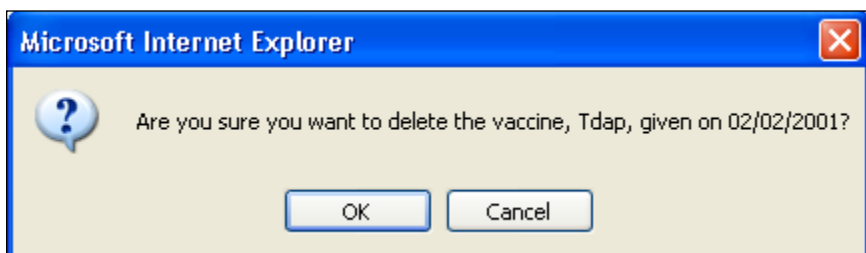
If the vaccine encounter in question does not have a hyperlink, it was not entered by your office. For information regarding correcting the immunization data, please refer to the **Petition for Modification to a MCIR Record** section of this reference guide.

Deleting Immunization Data

Once immunization data has been reported, it can only be modified from the **Immunization History** screen. You are only able to delete an immunization which your office has reported.

Step One: From the person's **Immunization History** screen, click the **Delete** hyperlink on the same line as the vaccine you wish to delete.

Step Two: A pop-up box should prompt you to verify your intention. Click **OK** to delete the immunization.

If the vaccine encounter in question does not display the Delete option to the far right of the vaccine, it was not entered by your office. For information regarding deleting immunization data, please refer to the **Petition for Modification to a MCIR Record** section of this reference guide.

Petition for Modification to a MCIR Record

A MCIR user or a person's responsible party may petition the Michigan Department of Health and Human Services (MDHHS) to have a MCIR record changed. Contact your Regional MCIR Office for the required **Petition for Modification** form and instructions.

Person's Address

All addresses in MCIR are validated against the US Postal Service database. To add a new address or correct the current address, click **Edit** on the Person Information section of the General Information screen.

Add a New Address

To add a new address to the record, click **Add New** in the Responsible Party section. Be sure to complete all required fields, indicated by an asterisk. Click the **Make Current Contact** button, submitting the new information.

Edit an Existing Address

To edit an address in the **Responsible Party** section, click on the address' hyperlink. Make the necessary edits and then click **Submit**.

Partial Address Updates

If you know a person has moved out state but you do not know their new mailing address, you should change the current address to the new state of residence, if known. After updating the State, check the **Address Invalid/Incomplete** box. Be sure to **Submit** your updates. The system will only accept a partial address update if the Address Invalid/Incomplete box has been checked.

Current Contact

To change the Current Contact (i.e., The address identified by the green check mark), you must click the **Make Current Contact** button. Clicking **Submit** will update address information, but it will not change the designated Current Contact.

Responsible Party : Add New			
Mommie Michigander 123 Immunization Way Pontiac MI 48341	Oakland	01/12/2017	✓
Mom Michigander	No County	08/29/2016	🗑
MOMMIE MICHIGANDER 123 MAIN, suite 21 ANCHORAGE AK	No County	01/20/2016	🗑

Submit	Make Current Contact	Cancel

Delete an Address

If you wish to delete a previous address, click on the trash can icon to the right of the address to be deleted. The Current Contact cannot be deleted. To delete this address, you must first change the **Make Current Contact** designation to an alternate address in the person's record. Once the address you wish to delete is no longer the designated Current Contact, the system should allow you to delete the address.
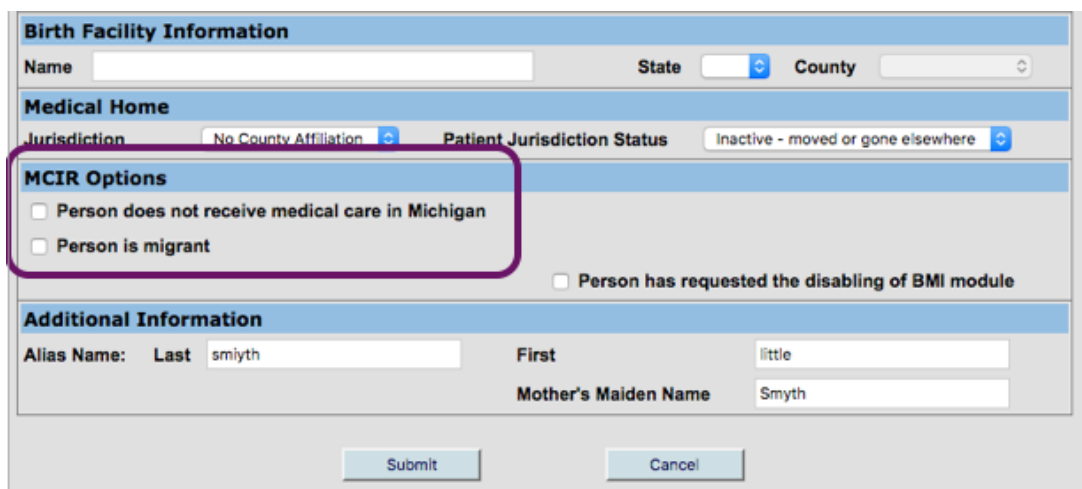
Medical Status

If a person resides in Michigan but receives care in another state, you should properly record this information to prevent system-based Reminder/Recall (R/R) notices from being generated for the person.

To indicate a person's change in medical status:

Step One: From the person's **General Information** screen, click the **Edit** link in the **Person Information** section.

Step Two: Scroll down to the **MCIR Options** section of the **Edit Person** screen and click on the **Person does not receive medical care in Michigan** box.

Step Three: Click **Submit** at the bottom of the screen to save your changes

ADDING IMMUNIZATIONS TO PERSON RECORD

How to Add Immunization to a Person's Record

Step One: To add immunizations to a person's record, you must first retrieve the person's record. Please refer to the **Person** section of this User Reference Guide for **Search for Person** and **Finding a MCIR Record** instructions and information.

Step Two: From the person's record, click on the **Add Imm** (Immunizations) link on the Person tab of the system's menu bar. The **Add Immunization** screen will appear.

How to Properly Report an Administered Vaccine to a Person's Record

Complete the Immunization Information section of the **Add Immunization** screen, following the below guidelines.

Step Three: Complete the **Add Imm** screen using the tables found on the next three pages as a reference.

Add Immunization Types: Descriptions & Defaults

Use the following table to determine the **Type** of vaccine administration to report.

Type	Description & Defaults
Admin	Choose **Admin** for documenting vaccines administered by your office. If you choose a vaccine and lot number tied to the system's inventory, the system will make an auto-deduction for the **Admin** dose in the lot number's Inventory Detail screen. ➢ Default **Add Imm** option for Vaccine Inventory Management (VIM) users ➢ Default setting for **Point of Contact for Reminder/Recall Notices** Refer to the MCIR User Reference Guide: Reminder/Recall for additional information.
No Inventory	Choose **No Inventory** for reporting vaccine administrations your office: 1.) does not wish to track using the inventory functions, and/or 2.) administered ≥ 6 months ago (i.e., "legacy data"). Note: Although **Lot Number** is not a required data field for this Admin Type, it is highly recommended your office add this information if you intend to use related system-based reports. ➢ Default **Add Imm** option for non-VIM users ➢ Default setting for **Point of Contact for Reminder/Recall Notices** Refer to the MCIR User Reference Guide: Reminder/Recall for additional information.
Titer/Immunity	Choose **Titer/Immunity** to document vaccines the person is not receiving due to documented disease and/or immunity (e.g. Chicken Pox) or as the result of a positive titer.
Non-Admin	Choose **Non-Admin** to document vaccines that are not administered for one of the following reasons: Medical, Religious, Parent Refusal, Patient Refusal and Other. Required data fields for the **Non-Admin** Type include: Date, Series and Reason. **Non-Admin** vaccines reported to a person's record will display at the bottom of the General Information and Immunization History screens. Note: Immunizations documented as Non-Administered will still show up as overdue on the person's **Status** screen.
Historical	Choose Historical for reporting vaccines which your office did not administer. Reporting Historical doses to a person's MCIR record is imperative to ensuring the (Immunization) Status properly reflects whether the person is overdue for vaccinations. Note: All immunizations reported using the **Historical** Type will automatically be assigned "Other Provider Data" in the vaccine **Eligibility** field.

Data Fields by Add Immunization Type:

Use the following table to determine information to report, based on the administration **Type** selected.

Type	Date	Vaccine/ Antigen/ Series	Eligibility	Manuf	Lot #	Volume	Site	Route	Reason
Admin	Actual Date of Service	Choose from Drop Down	Choose from Drop Down	Choose from Drop Down	Choose from Drop Down	Suggested but not required	Suggested but not required	Suggested but not required	No field
No Inventory	Actual Date of Service	Choose from Drop Down	Suggested but not required	Not a required field	Not a required field	Suggested but not required	Suggested but not required	Suggested but not required	No field
Titer/ Immunity	Actual Date of Service	Choose *from* Drop Down	*No field*	*No field*	*No field*	*No field*	*No field*	*No field*	No field
Non-Admin	Actual Date of Service	Choose from Drop Down	*No field*	*No field*	*No field*	*No field*	*No field*	*No field*	Choose from Drop Down
Historic	Actual Date of Service	Choose from Drop Down	"Other Provider Data" default	Not a required field	Not a required field	Not a required field	Not a required field	Not a required field	No field

Vaccine Eligibilities:

Use the following table to determine the Vaccine Eligibility. **Eligibility** refers to the person's <u>current</u> insurance coverage, *not* the vaccine's purchase type (e.g., VFC/Public vs. Private).

Vaccine Eligibilities	
Medicaid-VFC (includes MiChild)	Medicaid eligible or enrolled, including MI-Child and under 19 years of age
Uninsured	Insurance does not include vaccines or does not cover all ACIP recommended vaccines
Under Insured	Insurance does not cover any reimbursement for the cost of vaccine. Patient is under age 19 and does not receive MI-VRP.
Native American	American Indian or Alaska Native
Medicaid-Non-VFC	Medicaid eligible or enrolled, 19 years of age or older
Private Pay/Insurance	Not VFC Eligible. Insurance pays for all or part of the cost of the vaccine. As with underinsured, office co-pays or administration fees may be charged.
MI-VRP	Federal program for adult vaccines
Medicare A	Insurance does not include vaccine coverage
Medicare B	Routine coverage section for seniors; covers Pneumococcal, Td, Influenza and Hep B vaccines
Medicare D	Additional Medicare drug coverage paid by the subscriber (senior); covers Zoster and Tdap vaccines
Other Public Purchases	Vaccines purchased with county funds, by Local Health Departments, for administration to county residents.
317 Special	Vaccines covered by special federal program funding

Step Four: Once you have finished recording the necessary information on the **Add Imm** screen, click **Submit** or **Add More** (bottom of screen). Once vaccine administrations have been reported, they will appear on the person's **History** screen.

For information and instructions on adding and editing immunization associated to an inventory, please refer to the MCIR User Reference Guide: Vaccine Inventory Module (VIM).

Add Non-Reported Administrations (For Opted Out Persons)
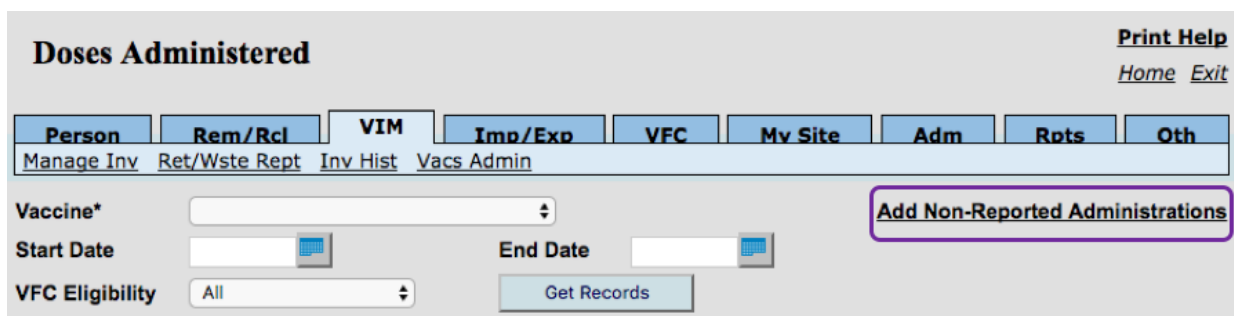
Vaccine doses administered to "Opt Out" persons cannot be recorded directly on the persons' records. These doses must be reported to the system as **Non-Reported Administrations** which will add the administrations to the "Doses Administered Report."

Follow the below instructions for reporting these administrations:

Step One: Click on the **Vaccines Administered** link, found under the **Vacc Mgmt** section of the system's landing page ("home screen").
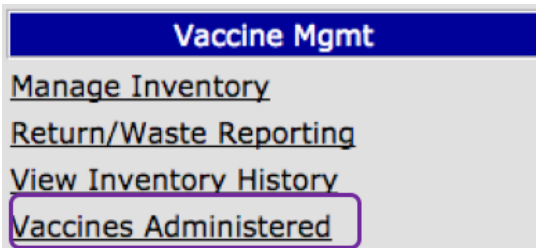
Step Two: Select the **Add Non-Reported Administrations** link, on the **Doses Administered** screen.

<u>Step Three:</u> Enter the required data fields for each vaccine given to the person and then click to **Add Records**. The doses will now be included on a **Doses Administered Report**.

Add Administered Doses

Person	Rem/Rcl	VIM	Imp/Exp	VFC	My Site	Adm	Rpts	Oth

Manage Inv   Ret/Wste Rept   Inv Hist   Vacs Admin

Date*	Vaccine*	DOB*	VFC Eligibility*	Reason*	Target Group*
				Opted-Out	
				Opted-Out	
				Opted-Out	
				Opted-Out	
				Opted-Out	
				Opted-Out	
				Opted-Out	
				Opted-Out	
				Opted-Out	
				Opted-Out	

Add Records	Cancel

To view a list of administrations added to MCIR by following the above **Add Non-Reported Administrations** steps, refer to the MCIR User Reference Guide: Reports "Vaccine" section, "Vaccine Inventory Module's Vaccines Administered Link" information.

Adding Two Doses of the Same Vaccine Type on the Same Day

Two doses of the same vaccine type can be administered on the same day if:

- the administered vaccines are reported as the **Admin** immunization type *only* (refer the **Add Immunization Types: Descriptions & Defaults** section of this reference guide for additional information on the "Admin" immunization type), and
- the administered vaccines meet one of the below:

Influenza
Two 0.25mL doses administered on the same day to equal one 0.5mL dose

Hepatitis B
Two 0.5mL pediatric doses administered on the same day to equal one 1.0mL adult dose

Hepatitis A
Two 0.5mL pediatric doses administered on the same day to equal one 1.0mL adult dose

Rabies and Rabies Immune Globulin (RIG)
RIG for wound management and Rabies vaccine both administered on the same day

Things to Know About Adding Two Doses of the Same Vaccine Type on the Same Day:

Only one dose will be accepted in MCIR via transfer data.

- The second dose will automatically be flagged in the transfer file as a possible duplicate.
- The second dose must be manually entered into MCIR.

MEDICAL HOME AND PATIENT PROVIDER STATUSES

Medical Home Rules

The system will automatically designate your provider office as the person's system-defined Medical Home if:

1. the most current administered vaccine documented in the person's MCIR record is associated to your provider office.
   - Doses reported as Historical and/or non-vaccine administrations (Ex: refusals or titers) do not count towards this rule.
   - Health Departments, Regional MCIR and State level users have access to immunizations reported by schools/childcares which are not viewable by provider offices and do not count towards this rule.
2. the most current vaccine reported is <u>not</u> a birth dose of Hepatitis B, a Seasonal Influenza, or an H1N1 Influenza.

Defining Patient Provider Status

The **Patient Provider Status** designations are defined by national Immunization Information Systems (IIS) standards as a means for assisting provider offices/local health departments in managing their patient population.

MCIR Patient Provider Status	Patient Provider Status Defined
Active	Auto-assigned by the system if the client's most recent immunization(s) were documented using the Admin vaccine administration Type. This rule excludes the birth dose of Hep B and any Influenza doses reported.
Inactive-Moved or Gone Elsewhere	A provider office is required to document one or more of the following reasons before changing a Person's status to Inactive-Moved or Gone Elsewhere: • person confirms receiving healthcare elsewhere. • person was discharged from practice. • mailed notices returned due to no forwarding address • person is confirmed as No Longer Receiving Medical Care in Michigan
Inactive-Lost to Follow-Up	A provider office should attempt to notify a person three times before changing the person's status to Inactive-Lost to Follow-up. One of these documented attempts must be a mailed R/R notice stamped as Return to Sender. Other attempts may include: • a phone call • a request for forwarding address from post office • additional mailing attempts, with return receipts • a home visit • an inquiry with other public health programs
Inactive-Deceased	Person is documented as deceased.
Inactive- unknown	This designation is not an available Patient Provider Status choice for Practices. Person records bearing this status were auto-flagged by MCIR, prior to 3/10/2011.

Patient Provider Status/Patient Jurisdictional Status (LHD Only) for the System-Designated Medical Home

The **Patient Provider Status** and **Patient Jurisdictional Status** (for LHDs Only) options available to the system-designated Medical Home are different from the options available to the non-Medical Home (i.e., another provider viewing the person's record).

Please refer to the Defining Patient Provider Status table of this reference guide to ensure the correct **Patient Status** is being selected.

System-designated Medical Home Patient Provider Statuses:

Non-Medical Home Patient Provider Statuses:

Patient Jurisdictional Statuses:

*Only Local Health Department users can see Patient Jurisdiction Status. Inactive-lost to follow up will only display if the person's county of residence matches the jurisdiction of the LHD viewing the record.

Viewing and Editing Patient Provider Status

Step One: From the person's **General Information** screen, click the Other tab to view the current Patient Provider Status recorded.

Immunizations		Lead		Other
Medical Home:		**Patient Provider Status:**	Active	
Medicaid:		**Health Plan:**		
Patient ID:				

Step Two: To edit Patient Provider Status, click on the **Edit** link, in the **Person Information** section of the **General Information** screen.

Step Three: Choose the appropriate* **Patient Provider Status** and then click **Submit**. *Reminder: **Patient Provider Status** options are different for the designated Medical Home vs another provider. Refer to the previous page of this reference guide for additional information.
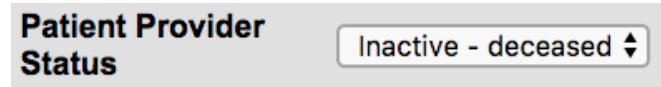
Deceased

To mark a person as **Deceased** change the **Patient Provider Status** to **Inactive-Deceased.**
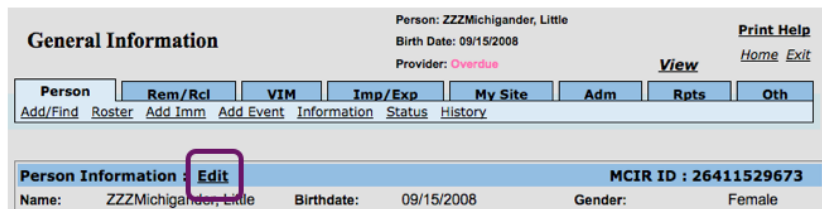
Patient Provider Status   Inactive - deceased

It is imperative that a person's record be flagged as deceased as soon as possible to prevent a Reminder/Recall notice from being mailed to the Responsible Party of the deceased person. For more information and/or instructions on performing Reminder/Recall, please refer to the MCIR User Reference Guide: Reminder/Recall (R/R).

Migrant

The **Person is Migrant** indicator can be checked for persons who frequently moves for employment (for self or family member). Persons flagged as Migrant can be excluded from MCIR Profile and Recall reports. For additional information and instructions on reports, please see the MCIR User Reference Guide: Reports.

Step One: From the **General Information** screen click on the Person Information **Edit** link.

General Information
Person: ZZZMichigander, Little
Birth Date: 09/15/2008
Provider: Overdue

Print Help
Home Exit
View

| Person | Rem/Rcl | VIM | Imp/Exp | My Site | Adm | Rpts | Oth |

Add/Find Roster Add Imm Add Event Information Status History

Person Information : Edit   MCIR ID : 26411529673
Name: ZZZMichigander, Little   Birthdate: 09/15/2008   Gender: Female

Step Two: Under the **MCIR Options** section of the record, (un)check the **Person is migrant** box**.**

MCIR Options
☐ Person does not receive medical care in Michigan
☐ Person is migrant
                                    ☐ Person has requested the disabling of BMI module

ROSTER

What is the Roster?

The **Roster** allows a facility to track their clients by including, and later removing, the clients in a listing. The Roster can be used to:

- quickly access a person's record.
- minimize duplicate persons' records.
- generate system-based reports. Please refer to the <u>MCIR User Reference Guide: Reports</u> for information and instructions on Roster-based report options.
- print multiple person records simultaneously, in preparation for office visits, immunization clinics and/or health screenings. Please refer to the MCIR User Reference Guide: Reports for information and instructions on **Batch** reporting.

Add (Person) to Roster/Take (Person) Off Roster

<u>Step One:</u> Retrieve the person's record by following instructions in the <u>Search for Person</u> section of this reference guide. Once the person's record has been retrieved, click the **Add to Roster** button located at the bottom of the person's record. The person has now been successfully added to the Roster.

For those sites with the default preference set to automatically **Add Person to Roster**, any person's record retrieved will automatically be added to the Roster. For additional information and instruction on setting/removing the **Add Person to Roster** site preference, please reference the MCIR User Reference Guide: My Site.

Step Two: To remove the person from the Roster, click the **Take Off Roster** button located at the bottom of the person's record. The person has now been successfully removed from the Roster.

If your site has the **Add Person to Roster** default enabled, you will need to remember to manually click the **Take Off Roster** button at the bottom of the person's record for anyone you do not wish to add to the Roster. See Step One above for additional information on **Add Person to Roster** site preference.

Accessing the Roster

To access the **Roster**, click on the **Roster** link from the Person section of the system's Landing Page ("home screen").

Viewing and Maintaining the Roster

Access Person Record from Roster

To retrieve a person's record from the **Roster**, click on the person's name (hyperlink).
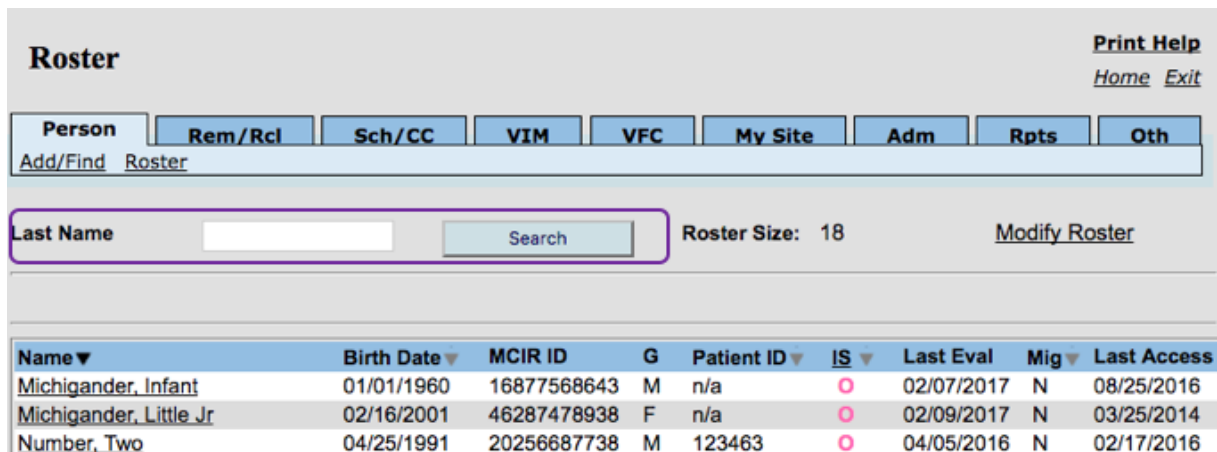
For those sites with large Rosters, it may be helpful to use the **Last Name Search** bar option to quickly locate a person's record in the Roster listing.

Sort Roster

To sort the **Roster** listing by **Name**, **Birth Date**, **Patient ID**, immunization status (**IS**) or Migrant (**Mig**) flag status, click on the specific criteria using the down arrow next to that criteria's header.

Remove Persons from Roster

There are two ways to delete a person from the Roster:

- Please refer to the <u>Add (Person) to Roster/Take (Person) Off Roster</u> section of this reference guide for instruction on deleting the person from the Roster from the person's record.
- Please refer to the section directly below for "remove person from Roster" instructions.

To remove persons from Roster:

<u>Step One:</u> From the Roster, click on the **Modify Roster** link.

Step Two: Check the box to the left of the person(s) to remove from the Roster and then click the **Delete Checked** button at the bottom of the Roster screen. Note: This action will remove the person(s) from the Roster. It will not delete the person's MCIR record.

Reporting Duplicate Persons Records from Roster

For instructions on reporting duplicate person records from the Roster, please reference the MCIR User Reference Guide: Reporting Duplicate Person Records.