

# North Carolina Immunization Registry (NCIR)

## Adding New Clients

## User Guide

Last Updated: October 2022



NC DEPARTMENT OF  
**HEALTH AND  
HUMAN SERVICES**



NCDHHS COVID-19 Response

# Steps for Searching for Clients

## Step 1 of 5: Confirm New Client

In order to add a new client into the NCIR, you must first search for the client.

If you have conducted a client search and you receive the following message: “no clients were found for the requested search criteria”, your client is not located in the system.

You can add the patient into the NCIR by selecting **Add This Client**.

**Client Search Criteria**

**Search by Client** Find

\* Last Name  Gender  M  F  Unknown Add This Client

\* First Name  Mother's Maiden Last

\* Birth Date   Mother's First Name

**Search by Chart Number**

\* Chart Number

\* Secondary Chart Number

**Search by Mother's Maiden Name**

\* Mother's Maiden Last  \* Client's Birth Date

\* Mother's First Name

NOTE: Fields marked with an asterisk \* are required.

Possible Matches: 0

Last Name	First Name	Middle Name	Birth Date	Chart #	Secondary Chart #	Mother's Maiden Last	Gender	City
No clients were found for the requested search criteria.								

### Audience

Typical User

Inventory Control

Administrator

## Step 2 of 5: Complete Personal and Client Information

When entering the patient's personal information. Please make sure that patient names that are entered into the NCIR reflect the patients' true, legally-documented name (via the birth certificate).

Personal Information - Client ID: 5999144

This Client ID number is a universal ID number for your client in the NCIR

\*Last Name: WONKA  
\*First Name: WILLIE  
Middle Name:   
\*Birth Date: 05/01/2006  
\*County of Residence: Wake  
Gender:  M  F  Unknown  
\*Mother's Maiden Last:   
\*Mother's First Name:   
Last Notice:   
NOTE: Fields marked with an asterisk \* are required.

Save  
History/Recommend  
Reports  
Cancel

dated by: NORTH CAROLINA IMMUNIZATION REGISTRY on 05/18/2009

Information Responsible Person(s) Client Comment(s)

Verification Date:   
Eligibility as reported by Responsible Person:

Provider Organization Specific Data  
Chart #: 5678  
Status: Active

Ethnicity: Unknown  
Race: Unknown

Under the **Client Information tab**, you want to capture as much information as possible when the patient is near you. This includes the patient's **race, ethnicity** and **chart number** (if applicable).

### Audience

Typical User

Inventory Control

Administrator



## Step 3 of 5: Complete Responsible Person(s) Information

Under the **Responsible Person (s)** tab there is room for up to hold 4 responsible parties for the patient.

You must have at least 1 person entered for the patient.

### Audience

Typical User

Inventory Control

Administrator

Client Information   **Responsible Person(s)**   Client Comment(s)

Responsible Person List

First Name	Relationship	City	Notices	Primary

**Enter New Responsible Person ...**

**Enter all of the required information, including: first and last name, relation, telephone, street address,, city and state.**

**Select the New button to document a responsible person.**

**It is important to document the language for the patient's family.**

\*Last Name: Barwell

First Name: Samantha

Middle Name:

\*Relation: Mother

\*Telephone: 919 - 123 - 4567

Extension:

E-Mail:

\*Street Address: 5601 Six Forks Road

Other Address:

P.O. Box:

\*City: Raleigh

\*State: NC   \*Zip: 27610

Language: ENGLISH

Notices?    Primary?

Buttons: New, Copy, Delete, Next, Cancel

*NOTE: Fields marked with an asterisk \* are required.*

## Step 4 of 5: Complete Client Comment(s) Tab

Under the Client Comment(s) tab, there is a list of contraindications, refusals and religious exemptions approved by the CDC.

Client Information   Responsible Person(s)   **Client Comment(s)**

Client Comment Listing

Select	Date	Client Comment	End Date

**New**  
**Delete**

Enter New Client Comment ...

\* Client Comment

\* Applies-To Date

End Date

**Next**  
**Cancel**

*NOTE: Fields marked with an asterisk \* are required.*

To choose the appropriate contraindication, click on the **Client Comment** drop down box.

### Audience

Typical User

Inventory Control

Administrator

## Step 5 of 5: Save the Client Information

**Personal Information - Client ID:**

• Last Name  
• First Name  
Middle Name

• Mother's Maiden Last Name: Samantha  
• Mother's First Name: Jones

• County of Residence: Wake

NOTE: Fields marked with an asterisk \* are required.

Save  
History/Recommend  
Add Next  
Cancel

Once you are done with entering all the client information you will need to save this information by clicking **Save**.

### Audience

Typical User

Inventory Control

Administrator

**Client Information**   **Responsible Person(s)**   **Client Comment(s)**

**Eligibility**

Verification Date:  
Eligibility as reported by Responsible Person:

**Provider Organization Specific Data**

Chart #: 5987  
Status: Active

Ethnicity: Not Hispanic or Latino  
Race: Black or African-American  
Provider-PCP: Good, Feel  
School:

NOTE: Fields marked with an asterisk \* are required.

# Where to Go for More Help?



## Questions?

### **Contact your Regional Immunization Program Consultant (RIC)**

The RIC Coverage Map with contact information is located on the Immunization Branch website:

<https://www.immunize.nc.gov/contacts.htm>

### **NC Vaccines Help Desk**

1-877-873-6247

For help desk hours or to submit a ticket, please click the link below:

[https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine)

# Appendix

## NCIR Roles

NCIR Role	Role Definition	Corollary Role in CVMS
Reports Only	This person in NCIR is only able to search for clients and view/print client specific records.	N/A
Typical User	Person who can manage, including add and edit, clients in NCIR, as well as manage inventory and ordering. This role also has all of the functionality of the Reports Only role.	Healthcare Provider
Inventory Control	Person who can manage inventory and ordering, as well as all of the functionality of the Typical user and Reports Only roles.	N/A
Administrator	Person who can manage organization users, sites, and clinicians in NCIR. They run practice-level reports, including reminder/recall. This role also has all of the functionality of the Reports Only, Typical User, and Inventory Control roles.	Location Manager