

North Carolina Immunization Registry (NCIR)

Searching for Clients

User Guide

Last Updated: March 22, 2022



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**



Steps for Searching for Clients

Step 1 of 2: Navigate to Client Search

Click the **manage client** link on the left menu panel.

The screenshot shows the NCIR web application interface. On the left is a dark blue sidebar menu with the NCIR logo at the top. Below the logo, it says 'UAT Region (T4) 9.6.0'. The menu items are: Clients (with 'manage client' highlighted in a red box), Immunizations, Reports, General, and Organizations. The main content area has a top navigation bar with 'home', 'change password', 'logout', and 'help desk' links. Below this is a yellow banner displaying user information: 'organization HOPE'S TRAINING FOR NCIR ONLY • user Athena Roberts • role Typical User'. Underneath is a grey box labeled 'announcements:' containing a list of five items, each with a 'NEW' tag, a date, and a link to a document or portal. The items are: '02/15/2016 ~ NCIR Meaningful Use Registration Portal', '02/04/2016 ~ 2016 Immunization Schedules', '12/21/2015 ~ Pentacel® Vaccine Delay Guidance', '12/08/2015 ~ Pentacel Update', and '11/19/2015 ~ Holiday Shipping'. The last item is '10/30/2015 ~ NCIR Maintenance'. A link for 'more announcements' is at the bottom of the list.

Audience

Reports Only

Typical User

Inventory Control

Administrator

Step 2 of 2: Enter Client Search Criteria

You are taken to the **Client Search Criteria** Screen.

Client Search Criteria

Search by Client

* Last Name Gender M F Unknown

* First Name Mother's Maiden Last

* Birth Date Mother's First Name

Search by Chart Number

* Chart Number

Search by Mother's Maiden Name

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

* Mother's First Name

Search by NCIR ID

* NCIR ID

The NCIR receives nightly uploads from the Medicaid System that imports clients from the Medicaid database into the NCIR. Also, an upload is made into the NCIR every Thursday from Vital Records.

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Please remember to always begin your client search by clicking on Manage Client; even if you think your client is not in the system yet, you have to always search for them here first.

Search Result 1: Exact Match

An Exact Match indicates that the NCIR recognizes the patient and they are already located within the system.

When a direct match occurs, you will be brought to the **Demographic Information Screen:**

Personal Information - Client ID: 5999144

*Last Name: WONKA
*First Name: WILLIE
Middle Name: _____
Date: 05/01/2006
*County of Residence: Wake
*Mother's Maiden Last: _____
*Mother's First Name: _____
Last Notice: _____

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

Last Updated by: NORTH CAROLINA IMMUNIZATION REGISTRY on 05/18/2009

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

Eligibility

Verification Date: _____
Eligibility as reported by Responsible Person: _____

Provider Organization Specific Data

Chart #: 5678
Status: Active

Ethnicity: Unknown
Race: Unknown

When you reach this screen, you want to make sure to review the information listed here and check it against your current records to ensure that you have located the correct patient.

If you notice any information listed is incorrect or has changed, **please update it.**

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Search Result 2: Client Match Detected

This indicates that there are possible clients that match the search criteria given for the patient.

1. Check personal records, and review the demographic information of the patient to make sure it is accurate and correct.
2. Select the hyperlink of the patient's last name to return to the demographic information screen.
3. Once you've located the patient, review their information to verify this is the patient that you are looking for.

Search by Chart Number
* Chart Number

Search by Mother's Maiden Name
* Mother's Maiden Last * Client's Birth Date 
* Mother's First Name

Search by NCIR ID
* NCIR ID

Client Match Detected

Based on the information you entered, your client is likely already in NCIR and is one of the clients listed below. Please review the demographic information for each of these clients and if none of them appears to be your client, you may then click the **Create New Client** button.

Please keep in mind that if you choose to ignore a client match and create a new record, that client will have two records in NCIR, neither of which will be complete and accurate!

Create New Client

Possible Matches: 1

Last Name	First Name	Middle Name	Birth Date	Chart #	Mother's Maiden Last	Gender	City
WELL	IMA	TEST CLIENT	02/17/2009		GOODEN	F	Raleigh

Audience

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Search Result 3: No Match Detected

If your client is not the in the NCIR you will see a message that says “No clients were found for the requested search criteria.”

If you cannot find a client, please try searching with fewer characters and/or less information.

After multiple attempts of locating the patient with no match, your client is not in the NCIR. You will need to enter them as a new client. (Please see Entering New Client Presentation).

Client Search Criteria

Search by Client

* Last Name Gender M F Unknown

* 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
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No clients were found for the requested search criteria.

Audience

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Additional Guidance

Searching for Clients Tips

- Please make sure to look up your patient prior to creating a new client, this will cause less duplicates in the registry.
- If you are experiencing issues locating the patient, try searching with fewer characters or less information.

Please Report Possible Duplicates

Personal Information - Client ID: 5999144		Save
- Last Name	WONKA	History/Recommend
- First Name	WILLIE	Reports
Middle Name		Cancel
- Mother's Maiden Last	WONKA	
- Mother's First Name	CAROL	
Gender	<input checked="" type="radio"/> M <input type="radio"/> F <input type="radio"/> Unknown	
- Birth Date	05/01/2006	
- County of Residence	Wake	
Last Notice 01/04/2012		
<i>NOTE: Fields marked with an asterisk * are required.</i>		

Last Updated by: ASHLEY'S TEST CLINIC on 02/07/2012

What to do if you find a duplicate?

- Contact the Immunization Branch through email
 - NCIRHelp@dhhs.nc.gov
- Include both client IDs:
 - Specify which record should be kept
 - Specify which immunizations need to be on record
- Do NOT include patient identifiable information (name, birth date, etc.) in the email
- You will receive a response through email when records are merged

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

(Monday – Friday 7:00 AM – 7:00 PM ET and Saturday 8:00 AM – 4:00 PM ET)

https://ncgov.servicenow.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