


# Patient Records

Patient records in Florida SHOTS have either been entered by County Health Departments, enrolled private providers, or Vital Statistics (if born in Florida on or after January 1, 2003), unless the patient or parent/guardian has opted out. Users with full access can add or edit patient records.

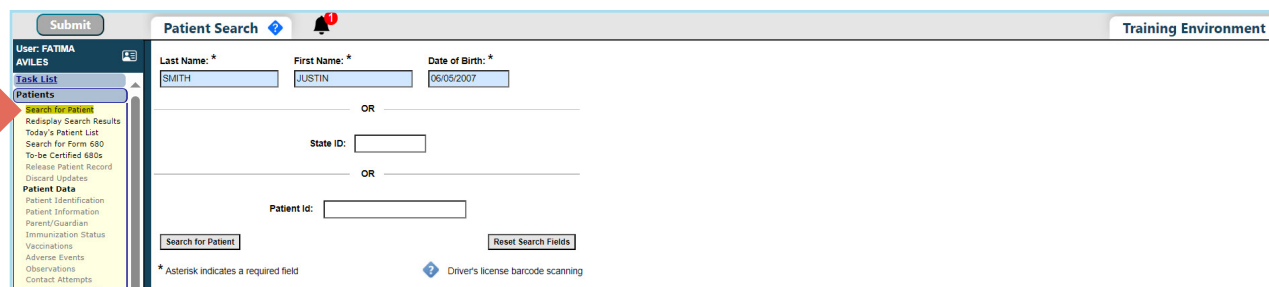
This guide provides information about how to search for existing records and add new patient records that are not already in Florida SHOTS.

## STEP 1

To search for a patient record, navigate to the “**Search for Patient**” page under the “**Patients**” menu option. The system will automatically direct you to this page as soon as you log in unless there are pending items in your Task List.

**NOTE:** The “**Help Text**” icon  is available on all the Florida SHOTS pages and provides information on completing the fields on the page. You can click on the icon to show the text and click on it again to hide it.

This page is compatible with 2D barcode scanning to assist with completing the patient record search and adding details to a new patient record.



On the **Patient Search** page, you can initiate your patient record search by entering:

- Patient's **Last Name, First Name and digits for Date of Birth**. All three fields must be completed if you choose this option. The system can also complete a search by entering the first few letters of patient's name.

**OR**

- State ID which is the patient's Florida SHOTS record ID.

**OR**

- Uploading private provider organizations can enter the **Patient Id**.

Click on the “**Search for Patient**” button to complete the search.

## STEP 2

The results, if there are any, will be displayed at the bottom of the page with additional options.

The screenshot shows a 'Patient Search' interface with the following elements:

- Header: 'Patient Search' with a dropdown arrow and a notification bell icon. On the right, it says 'Training Environment'.
- Search Fields:
  - Last Name: \* (input: SMITH)
  - First Name: \* (input: JUSTIN)
  - Date of Birth: \* (input: 06/05/2007)
  - OR separator
  - State ID: (empty input)
  - OR separator
  - Patient Id: (empty input)
- Buttons: 'Search for Patient' and 'Reset Search Fields'.
- Footnote: '\* Asterisk indicates a required field' and 'Driver's license barcode scanning' with a diamond icon.
- Results Table:
 

Last Name, First Name	Date Of Birth	SSN	Sex	State ID
SMITH,JUSTIN	06/05/2007		M	9901437471
- Bottom Buttons: 'Add New Patient' and 'Extend Search'.

Each patient record line will display the **Last Name, First Name, Date of Birth, Social Security Number (partially hidden), Sex, and Florida SHOTS State ID**. If you hover your cursor over the record line, the patient's address and **Current Immunization Provider (CIP)** will be displayed.

**NOTE:** If after reviewing the records you discover that the patient has more than one record, contact the Florida SHOTS Help Desk to request a merge of duplicate records.

Click on the patient record line to open.

The “**Add New Patient**” button is available to add a patient record.

“**Extend Search**” button may be available to do a more thorough search for the patient record.

## ▶ Opening a Patient Record

Once you click on the patient record line to open, a message will appear if the patient is due or overdue for any vaccines. Click “OK” to continue.

**www.flshots.com says**

\*\*\* Important information regarding this patient \*\*\*

This patient is Due Now or Overdue for the following antigens:  
 FLU: Overdue

OK

The patient record, or “**Patient Data**,” is comprised of the following pages:

Patients
Search for Patient
Redisplay Search Results
Today's Patient List
Search for Form 680
To-be Certified 680s
Release Patient Record
Discard Updates
<b>Patient Data</b>
Patient Identification
Patient Information
Parent/Guardian
Immunization Status
Vaccinations
Adverse Events
Observations
Contact Attempts
Exclude From Recall
New Imm Status
Merge History
<b>Forms</b>
Form 680 (name only)
Form 680 (school entry)
Create Form 680 Pin
Form 686 (Imm History)
Form 687 (Clinic Record)
Form 1478 (opt-out)
<b>Reports</b>
<b>Religious Exemption</b>
Religious Exemption

**Patient Identification** – Provides the patient's identifying information.

**Patient Information** – The patient's demographic information including the Current Immunization Provider (CIP).

**Parent/Guardian** – Will display the patient's parent or guardian information, if available.

**Immunization Status** – Provides the patient's immunization status and vaccination forecasting/recommendations based on what has been entered into the system.

**Vaccinations** – Contains a list of all vaccinations that have been entered for the patient and allows certain users to review, record and edit immunizations given to the patient.

**Adverse Events** – Provides information about whether the patient has experienced an adverse event to a vaccination.

**Observations** – Review and record factors such as contraindications, immunity declarations, etc. for the patient.

**Contact Attempts** – View and record any attempts to contact the patient to return for vaccinations.

**Exclude from Recall** - Will prevent the Reminder/Recall report from indicating that this patient is due or overdue for selected antigen(s).

**Merge History** – Shows whether the patient record has been merged with other duplicate records in the past.

**Forms** – Create and/or review patient immunization forms.


**Religious Exemptions** – View copy of issued Religious Exemption, if applicable.

The permission granted to the user determines the ability to review, add, or update information in the patient record. Information about completing patient record updates can be found on the [Training](#) page.

## ▶ Adding a Patient Record

A new patient record cannot be added into [Florida SHOTS](#) until a search is completed and it is verified that the patient does not already have a record in the system. After searching and confirming no record exists, click on the **"Add New Patient"** button located at the bottom of the search results to start adding the patient.

Last Name, First Name	Date Of Birth	SSN	Sex	State ID
SMITH,JUSTIN	06/05/2007		M	9901437471



This warning will emerge to confirm that a duplicate is not being created. Click on “OK” to continue.

**www.flshots.com says**

Warning: Adding a new patient may cause a duplicate condition.

Click 'OK' to continue.

This warning will emerge to confirm that a duplicate is not being created. Click on “OK” to continue.

**Name:** SMITH,JUSTIN
**State IMM ID:**
**Sex:**

**DOB:** 06/05/2007
**SSN:**
**Status:**

**CIP:**

**Patient Identification**
**Training Environment**

<b>Last:*</b>	<b>First:*</b>	<b>Middle:</b>	<b>Suffix:</b>
<input type="text" value="SMITH"/>	<input type="text" value="JUSTIN"/>	<input type="text" value="B"/>	<input type="text"/>
<b>Name:</b> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Alias:</b> <input type="text"/>	<input type="text"/>		
<b>Status:*</b> <input type="text" value="ACTIVE"/>			
<b>Sex:*</b> <input type="text" value="Male"/>			
<b>Date of Birth:*</b> <input type="text" value="06/05/2007"/>			
<b>Birth Certificate #:</b>			
<b>State of Birth:</b> <input type="text" value="FL"/>			
<b>SSN:</b> <input type="text" value="593-12-3456"/>			
<b>WIC id:</b>			
<b>Birth Event Outcome:</b> <input type="text" value="--Select--"/>			
<b>Race:*</b> <input type="text" value="White"/>			
<b>Ethnicity:*</b> <input type="text" value="HISPANIC OR HAITIAN ORIGIN"/>			
<b>Date of Death:</b> <input type="text"/>			
<b>Death Certificate #:</b>			
<b>Date Moved Elsewhere:</b> <input type="text"/>			
<b>Medicaid Number:</b> <input type="text"/>			
<b>Beg Date:</b> <input type="text"/>			
<b>End Date:</b> <input type="text"/>			
<b>Birth Order:</b> <input type="text" value="--Select--"/>			

**Opt-out form (DH1478)**

**VS 1478 Provided:**  [View or Print: Opt-out form](#)

If the patient was provided the opt-out form by your organization, enter the information below.

**Providing Person:**  **Date:**

**Comment:**

Maximum characters permitted: 1024. Character count: 0

**\* Asterisk indicates a required field**

Fields highlighted in blue indicate required fields, but it is highly encouraged to enter all optional information if available. This information can assist in determining duplicate records or prevent records from merging in the first place.

“Status” defaults to “Active”.

“Birth Event Outcome” and “Birth Order” should be recorded for multiple births. This is helpful for patients who are twins, triplets, etc. and have similar names. Providing this information minimizes the chances of siblings’ records merging due to similarity in demographics.

Click on the "Next" to continue.

Next, users will be brought to the "Patient Information" page:

**Name:** SMITH,JUSTIN      **State IMM Id:**      **Sex:**  
**DOB:** 06/05/2007      **SSN:**      **Status:**  
**CIP:**

**Physical Address**      **Mailing Address (if different)**

**Address:** \* 123 FLORIDA WAY  
**City:** \* WEST PALM BEACH  
**St/Zip:** \* FL 33401  
**County of Residence:** \* Palm Beach  
**Phone:** (111) 222-3333      **Religious Exemption:** No  
**Language (if not English):** --Select--  
**Email Address:** jsmith@invalid.com  
**Current IMM Provider:** BEACH MEDICAL  
**Imm Service Site:** \* SUNSET PIDS

\* Asterisk indicates a required field

**Next**      **Cancel**

Enter the patient's **Address, County of Residence, Phone number** and **Email Address** if available.

Maintaining accurate and up to date patient demographics allows providers to use the Reminder/Recall tool in Florida SHOTS to identify patients who are due or overdue for vaccines and send reminders.

The **Current IMM Provider** will default to your organization. This field can be updated for any new patient that has an existing record in Florida SHOTS and will list the most recent provider who provided immunizations.

If your organization has multiple service sites, select the service site where the patient is currently receiving services on the **IMM Service Site** field.

Click on the "Next" button.

The **Parent/Guardian** Information page will be displayed:

**FloridaShots**      **Name:** SMITH,JUSTIN      **State IMM Id:**      **Sex:**  
**DOB:** 06/05/2007      **SSN:**      **Status:**  
**CIP:**

**Submit**      **Parent / Guardian Information**      **Training Environment**

**MOTHER**

Last Name:      First Name:      Middle Name:      SSN:      DOB:      Day Phone:      Night Phone:      Email Address:

**FATHER**

Last Name:      First Name:      Middle Name:      SSN:      DOB:      Day Phone:      Night Phone:      Email Address:

**GUARDIAN**

Last Name:      First Name:      Middle Name:      SSN:      DOB:      Day Phone:      Night Phone:

**Next**      **Cancel**

Enter the parent or guardian information, if applicable. There are several areas within the system (including the DH680 form) where the parent or guardian information is requested and the information will automatically populate if the information has been entered here. This information may also assist in determining duplicate records.

Click on the yellow **“Submit”** button located on the top left of the page to finish adding the patient record in [Florida SHOTS](#).

Once the record is saved, the **“Submit”** button will be grayed out. Information regarding updating patient records such as adding vaccinations can be found on the [Training](#) page.

## Help Desk



### FREE TECHNICAL SUPPORT:

877-888-7468 (SHOT)

MONDAY – FRIDAY, 8 A.M. TO 5 P.M. EASTERN

### INCLUDING:

- Merging duplicate patient records
- Adding account administrators
- Unlocking Florida SHOTS accounts
- Questions about any Florida SHOTS features