

Immunization Law Handbook

**For Local Health Department
School Immunization Law
Coordinators**

Date: November 2016

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Introduction

This handbook was developed to assist in the process of implementing the requirements of Oregon's school and children's facility immunization law in your county.

Oregon's school immunization statutes and administrative rules were created to help protect children from the risks of diseases that are preventable through immunization. Local health departments work together with schools and children's facilities in each county to implement the law and protect children and students against vaccine preventable diseases.

Schools/children's facilities responsibilities:

- Obtain immunization records for all children in their program
- Track children who will need additional vaccines
- Identify children who are not in compliance with the law
- Submit the Primary Review Summary report to the local health department by 35 days before Exclusion Day (this date is the Wednesday from January 11 to 17)
- Exclude children who don't receive the necessary vaccines or have an appropriate exemption on file by Exclusion Day (3rd Wednesday in February)
- Submit the follow-up Primary Review Summary report to the local health department by 12 days after Exclusion Day

Local health department responsibilities:

- Identify schools and children's facilities that are required to participate in the immunization review process
- Offer training opportunities
- Provide forms to schools/children's facilities
- Assist schools/children's facilities during the immunization review process
- Issue exclusion orders
- Assist families who need immunization services and ensure that accurate information is provided for the parents to turn into the child's school/facility
- Enter data into the IRIS School Exclusion module

This handbook can help you:

- Plan the steps required to complete the process
- Ensure accurate processing of immunization review forms
- Identify additional staffing needs during peak periods
- Know who to call when you have questions

Please keep this handbook in a convenient place along with the Immunization Law Handbook for Schools, Preschools, Head Starts and Certified Day Care Providers.

If you have questions, please call the Oregon Immunization Program at 971-673-0300.

Commonly Used Definitions

This page gives the definitions of many terms used throughout this handbook. Anytime one of the following terms is used, it is used with the meaning given below.

Administrator

The principal or other person having general control and supervision of a school or facility. This is the person responsible for exclusion and general enforcement of the law and rules.

ALERT IIS

The ALERT immunization information system (IIS) is a database that records vaccinations given throughout Oregon and includes people of all ages.

Certificate of Immunization Status (CIS)

The official document that is used to record a child's immunization history or a nonmedical exemption. Local health departments distribute these forms to schools and children's facilities in their jurisdiction. In some areas, Education Service Districts (ESDs) also distribute CIS forms.

Children's facility or facility

A certified child care center, certified child care home, Head Start or preschool; or a program caring for children six weeks of age to kindergarten entry that is operated by or shares space with a children's facility or school.

Exclude or exclusion

Not allowing a student to attend a school/facility based on an exclusion order issued by the health department, school or facility.

Health care practitioner

A practitioner of the healing arts who has the authority to order immunizations within the scope of his or her license. This includes: MDs, DOs, licensed nurse practitioners and physician assistants with prescription writing privileges who are working under the sponsorship of a physician, or a registered nurse working under the direction of a physician.

Immunity documentation

Information to be used in lieu of a immunization date indicating that the individual is not susceptible to a specific vaccine preventable disease because of a blood titer indicating immunity.

Immunization Program

The Oregon Health Authority, Public Health Division, Office of Family Health, Immunization Program.

Local health department

The district or county board of health, public health officer, public health administrator or health department having jurisdiction in the area

Medical Exemption

Document signed by a physician stating that a child should not receive one more specific immunizations because they have a medical condition that puts the child at risk of harm if he or she receives the vaccines. The child is considered susceptible to the vaccine preventable disease they have a medical exemption for that vaccine.

New enterer

Infants or preschoolers attending an Oregon facility; infants or preschoolers attending a drop-in facility on five or more different days within one calendar year; children initially attending a school at the entry level (kindergarten or the first grade, whichever is the entry level); children from a home-school setting initially attending a school or facility at any grade (preschool through 12th grade); or children initially attending a school or facility after entering the United States from a foreign country at any grade (preschool through 12th grade).

Nonmedical exemption

Option parents may choose if they do not wish their child to receive one or more vaccines but wishes the child to attend school or children's facility. Requires parent to submit two documents. A signed CIS form and a Vaccine Education Certificate from a health care provider or printed from the online vaccine education module.

Parent

The parent, guardian or other adult who is responsible for the child; a child who is emancipated; or a student who has reached the age of 15 years (the person generally recognized as having care of the child).

Physician

A person licensed by the Oregon Board of Medical Examiners (MD or DO) or the Oregon Naturopathic Board of Examiners (ND); a person similarly licensed by another state or country in which the person practices; or a commissioned medical officer of the Armed Forces or Public Health Service of the United States.

Public Health Division

The Oregon Health Authority, Public Health Division.

School

A public, private, charter, parochial or alternative educational program offering kindergarten through grade 12 or any part thereof.

Transferring student

A child moving from one facility to another facility, only when records are requested in advance of attendance from a previous facility; one school in this state to another school in this state when the move is not the result of a normal progression of grade level; or a school in another state to a school in this state.

Vaccine Education Certificate

A document prescribed by the Public Health Division stating that the parent is declining one or more vaccines on behalf of their child and documents completion of the online vaccine education module or a signature from a health care practitioner verifying discussions of risks and benefits of immunization with the parent.

Common Vaccine Names and Abbreviations

Adacel	Tdap vaccine
Boostrix	Tdap vaccine
Cervarix	Bivalent HPV vaccine
Comvax	Hib and Hep B vaccine
DT	Diphtheria and Tetanus pediatric vaccine
DTaP	Diphtheria, Tetanus and acellular Pertussis pediatric vaccine
DTP	Diphtheria, Tetanus and Pertussis vaccine
Flu	Influenza – brand names include Afluria, Agriflu, Fluarix, Flulaval, FluMist, Flushield, Fluvirin, and Fluzone
Gardasil	Quadravalent HPV vaccine
Havrix	Hepatitis A vaccine
Hep A	Hepatitis A
Hep B	Hepatitis B
Hib	<i>Haemophilus influenzae</i> type B
HPV	Human papillomavirus
IPOL	IPV
IPV	Injectible Polio vaccine
Kinrix	DTaP and IPV vaccine
MCV4	Meningococcal conjugate vaccine
Menactra	Meningococcal conjugate vaccine
Menomune	Meningococcal polysaccharide vaccine
Menveo	Meningococcal conjugate vaccine
MMR	Measles, Mumps and Rubella vaccine
MMRV	Measles, Mumps, Rubella and Varicella vaccine
MPSV	Meningococcal polysaccharide vaccine
OPV	Oral Polio vaccine
PCV7	Pneumococcal conjugate vaccine—7 valent
PCV13	Pneumococcal conjugate vaccine—13 valent
Pediarix	DTaP, Polio and Hepatitis B vaccine
Pentacel	DTaP, Polio and Hib vaccine
Prenar	Pneumococcal conjugate vaccine
ProQuad	Measles, Mumps, Rubella and Varicella vaccine
PPV23	Pneumococcal polysaccharide vaccine
RotaTeq	Rotavirus vaccine
Rotarix	Rotavirus vaccine
Td	Tetanus and Diphtheria vaccine
Tdap	Tetanus, Diphtheria, and acellular Pertussis vaccine
TriHIBit	DTaP and Hib vaccine
Tripedia	DTaP
Varicella	Chickenpox
Varivax	Chickenpox vaccine
Vaqta	Hepatitis A vaccine

Common Acronyms and Abbreviations

ACIP	Advisory Committee on Immunization Practices
CDC	Centers for Disease Control and Prevention
CIS	Certificate of Immunization Status (the school/facility immunization form)
LHD	Local health department
PRS	Primary Review Summary form

Calendar of Required Reporting Dates 2015-2020

Records due to the local health department:

By the dates listed below, the school or children's facility administrator must submit to the local health department the completed Primary Review Summary (PRS) Sections A and B, and copies of the Certificate of Immunization Status (CIS) forms of children who have incomplete/insufficient immunization records, or have medical exemptions needing review. The PRS and student vaccine history may also be submitted by computer reports if the assessment and reporting system used has been approved by the Oregon Immunization Program.

January 11, 2017

January 17, 2018

January 16, 2019

January 15, 2020

January 14, 2021

Secondary Review

Local health departments review records and prepare exclusion orders.

January 12, 2017 – January 31, 2017

January 18, 2018 – February 6, 2018

January 17, 2019 – February 5, 2019

January 16, 2020 – February 4, 2020

January 15, 2021 – February 3, 2021

Exclusion orders mailed

Copies of the exclusion orders are mailed to parents and schools/children's facilities by this date.

February 1, 2017

February 7, 2018

February 6, 2019

February 5, 2020

February 4, 2021

Exclusion Day

Schools and children's facilities must send home children whose exclusion orders are not canceled by the time class starts on this date. There are no exceptions to exclusion on this date.

February 15, 2017

February 21, 2018

February 20, 2019

February 19, 2020

February 18, 2021

Updated Primary Review Summary (PRS) due to the local health department

The updated page 2 (Section D) and page 3 (Section E, F and/or G, if appropriate) of the PRS are due to the local health department.

February 27, 2017

March 5, 2018

March 4, 2019

March 3, 2020

March 2, 2021

County Immunization Status Report due

Data for all schools and children's facilities in the county must be entered into the FamilyNet/IRIS School Exclusion Module. The County Immunization Status Report is automatically submitted to the Oregon Immunization Program when all of the school and children's facility reports are entered.

March 10, 2017

March 16, 2018

March 15, 2019

March 14, 2020

March 13, 2021

Additional review cycles for incomplete or insufficient records with specific time-frames are allowable if mutually agreed upon by the affected local health department and school or facility. Additional exclusion cycles may be required at the direction of the local health department or the Public Health Division. Exclusion dates shall be no less than 14 calendar days from the date that the exclusion orders are mailed.

Immunization Review Checklist—Summer

- Add the required immunization reporting dates and the exclusion date to your calendar.

	School Year 2016-2017	
Primary Review Summary (PRS) pages 1-2 due to local health department (LHD)	January 12, 2017	See pages 9 - 10 for future years
Exclusion Orders Mailed by LHD	February 1, 2017	
Exclusion Day	February 15, 2017	
Updated Primary Review Summary pages 2-3 due to LHD	February 27, 2017	
LHD completes PRS data entry for County Immunization Status Report	March 10, 2017	

- Order a good supply of Certificate of Immunization Status (CIS) forms (53-05A) from the Oregon Immunization Program. This is the time of year when lots of requests will be coming in from schools and children’s facilities needing CIS forms. Be sure that staff knows who will be handling the requests, ordering and tracking supplies, and mailing out the forms. Have clear instructions of where CIS forms will be available for pickup if schools/children’s facilities come in for their forms.
- Update your mailing list in the IRIS School Exclusion module. Look at the list of certified child cares from the Child Care Division and public schools from the Department of Education to identify new sites. For new preschools and private schools, look in the phone book, community newspapers, and the internet for new sites.
- Share the calendar with staff responsible for providing immunization services in your county. This will allow for adjustment of staffing during peak periods of immunization service requests.

Immunization Review Checklist—October/November

- ❑ Schedule training opportunities for school/children's facility staff. The Oregon Immunization Program can assist with training if asked at least two weeks in advance.
- ❑ Confirm the number of reporting packets you will need for all of your schools (public and private), certified child cares, preschools, and Head Start programs, plus a few extra.
- ❑ Receive packets from the Oregon Immunization Program. Packets generally arrive around the beginning of November. The packet will include the forms needed by schools and children's facilities to complete the immunization primary review summary report to be submitted to the local health department.
- ❑ Develop a cover letter to the schools/children's facilities that walks them through the steps of the primary review process. Providing a return address label can help programs get their reports back to the right person at the LHD.
- ❑ Mail or deliver packets to all of your programs.
- ❑ Schedule any special immunization clinics needed during the exclusion process. The most effective times can be the first Saturday after exclusion letters are mailed and the day before exclusion. In some areas there is also an increased demand on Exclusion Day. Look at clinic attendance from previous years to help schedule your clinics.
- ❑ Schedule or alert any additional services that you may require to assist with the process. The mailroom, folding and stuffing envelopes, and other support services may need to be involved depending on the number of letters sent.
- ❑ Check with your public schools to determine whether they have the capacity to print exclusion orders directly from their system and if they can, provide them with the signature, address and phone number necessary to complete the letters.

Immunization Review Checklist—December

- Call each school/facility about 10 days after packets are sent, to ensure:
 - the packet was delivered to the correct person
 - the contact person is the same as the previous year or is updated
 - the site has started to work on the immunization review process
 - the site understands how to complete the PRS
 - the site knows when the report is due back to you
- Update the school/facility information in IRIS as needed and resend packets, or ask the program to pick up the packet if they haven't received one yet.
- Check your supplies. This includes window envelopes for mailing exclusion orders to parents and various sizes of manila envelopes for mailing copies of the exclusion letters back to schools and children's facilities.
- Order paper for printing white incomplete/insufficient (form 53-07A) and yellow no record (form 53-08A) exclusion orders from the Oregon Immunization Program. Base your projections on last year's numbers with a little extra.
- Prepare lists or a system for documenting when reports have been received. Reports may begin to arrive soon after the packets have been sent. Log reports in as you receive them.
- Determine whether additional help may be needed during the three weeks of secondary review (January-February), and be sure that affected staff members have this activity on their schedule.
- Write or update a cover letter to be mailed with exclusion letters to parents. The letter should explain to the parent/guardian the steps necessary to get their child in compliance with the school immunization law requirements. Include local information on where immunization services and/or records may be obtained.
- Arrange for the necessary space and equipment needed for staff to enter and process the exclusion orders. It is helpful for a phone, copier, and fax to be available if there are questions or missing information in the report that schools/children's facilities may need to fax to you. A designated fax will insure that faxes coming in are not misdirected or loss.

Immunization Review Checklist—January

- ❑ Call all of the schools/children's facilities who have not sent in reports by the first week in January to ensure they have the report, they are working on the report, and they know that the report is due the following week.
- ❑ Log reports in as they arrive. Review the materials to ensure that everything has been included and the information is accurate. Contact programs missing any information on the report.
- ❑ File the reports in a manner that makes them easy to find. Some LHDs use large manila envelopes or file folders for each school/facility. The system needs to accommodate copies of the CIS and Primary Review Summary forms.
- ❑ Track all of your programs to ensure you have a report from everyone. Call sites five days after the date due (or sooner) if their report has not arrived. You are required to give a site four working days to get the report to you. After that time, if they are still out of compliance, the site needs to be reported to the state for follow-up. This step can be completed any time after the four days are up and the program has been unresponsive.
- ❑ Determine staffing responsibilities. You will need time for you or additional staff to review each record sent to you to evaluate whether the child needs any required immunizations. You can also use the assessments from approved computer systems to determine required vaccines. Indicate needed vaccine(s) and dose number on Page 2 Section C of the Primary Review Summary (PRS). List the vaccines in the same order as they are found on the CIS form. This sequence also matches the order in IRIS so that data entry can be completed more easily. The staff person evaluating the records and determining what vaccines are needed can also enter exclusion order information into the IRIS School Exclusion module, or it may be more efficient to have support staff enter the letters.
- ❑ Send medical exemptions to the person designated to handle them.
- ❑ Print two copies of the exclusion orders. One copy goes to the parent and a second copy is mailed to the school/facility. You may also choose to print a third copy for your files, but you do not need to print out a copy of the letter for your office if you are using the IRIS School Exclusion module.

- ❑ Many schools use student tracking systems that can generate exclusion orders. You are encouraged to use this function if available as it will save you a lot of time and money. They can print on white paper and then you can copy of orders over into the appropriate paper.
- ❑ If a site is late in turning in their report, contact the state. The date in IRIS can be reset in order to ensure that each letter still gives the family two weeks to obtain the necessary services or turn the required information into the school.

Immunization Review Checklist—February

- ❑ Anticipate phone calls after the letters have been mailed. Answer questions, reassure parents that their children can come into compliance with immunization requirements, and refer for immunization services.
- ❑ Contact schools/facilities if letters are returned as undeliverable. Resend the letter if the program has an updated address that is different. If the program has the same address used for the mailing and the child is still out of compliance with immunization requirements, ask them to make a copy of the exclusion order and send it home with the child.
- ❑ On exclusion day, or one day after, many LHDs call the schools/facilities that had exclusion letters sent to determine if all of their children came into compliance or whether they had to exclude any child. The media may want the information as soon as it is available. This is also an excellent time to remind the programs of the date of when the follow-up Primary Review Summary report (pages 2-3) is due back to your office, and to ask if they have any questions about how to complete the report.

Immunization Review Checklist— End of February/Beginning of March

- ❑ Collect follow-up PRS reports from all programs. Call programs that have not completed the follow-up report. They can fax/email the information to you or you can complete the information over the phone, if necessary.
- ❑ Many schools use student tracking systems that can generate exclusion orders. You are encouraged to use this function if available as it will save you a lot of time and money. They can print on white paper and then you can photocopy onto the special exclusion order paper.
- ❑ Enter all of the data from the follow-up reports into the IRIS School Exclusion module. Let the Oregon Immunization Program know when all of your follow-up data have been entered, and the County Status Report will automatically be accessible by the Immunization Program.

Immunization Review Check List—March/April

- ❑ Fix any problems identified by the Oregon Immunization Program after they have reviewed all of the data that has been entered into IRIS.

Immunization Review Check List—May

- ❑ Each May the state will produce a graph of immunization rates by vaccine for children less than school-age, 19 months to 5 years old from ALERT IIS data. They will also produce a graph of immunization rates by vaccine for school-age children from information entered into IRIS for school-aged children.
- ❑ Share the information with all of your schools/children's facilities by May 15th each year in order for each site to post the information along with their site immunization rates within 30 days after the beginning of the school year and 30 days after exclusion day.
- ❑ Take a day or so off. You earned it!

Who Do the Rules Apply To?

The immunization law and rules apply to all children enrolled for five or more days per school year in a school or preschool, or five or more days per calendar year in other children's facilities. The law applies in the following settings:

Schools:

- Public schools — elementary, middle and high school level
- Charter schools
- Private schools
- Alternative schools and juvenile justice facilities that provide educational instruction designed to lead to a high school diploma or transfer into a regular high school program.

Some examples are:

- Oregon Youth Authority (OYA) sites
- English Language Learner (ELL) programs that prepare new enterers for school immersion
- Juvenile detention facilities that have students for 30 days or more
- Sites that provide educational services for students receiving treatment for health and mental health issues including addiction
- Programs enrolling students for high school equivalency or GEDs that share facilities with schools

All schools providing any part of kindergarten through grade 12 education are required to comply with these requirements. No schools are exempted under Oregon law.

Students in court-mandated residential correctional facilities, including but not limited to Oregon Youth Authority closed custody sites, are not subject to exclusion. The administrator of the residential correctional facilities must comply with all other provisions of these rules, including submission of the required reports. The administrator must ensure that students have complete or up-to-date immunization records a nonmedical or medical exemption, or immunity documentation for all vaccines required for the student's grade.

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Children's facilities:

- Child care centers or family child care homes *certified* by the Oregon Employment Department
- Preschools
- Head Start programs
- Programs offering care to children younger than kindergarten that share facilities with a school, preschool or certified child care

Child care providers that are *registered* with the Employment Department need to maintain an up-to-date Certificate of Immunization Status (CIS) form for each child in their care, but do not participate in the immunization review and exclusion cycle.

Children's facilities that exclusively fit the following descriptions are excluded from Oregon's immunization law requirements:

- A program that only offers extra-curricular training in a specific subject like music, sports or dance
- Group social or athletic activities sponsored by an organized club
- A child care facility where children may only attend on a limited basis, not to exceed four times per calendar year
- A child care facility that exclusively provides before and/or after school care for school-aged kids
- Child care operated occasionally by a person or organization not ordinarily engaged in providing child care

Visitors, residents, part-time, and home-schooled students

Any child visiting or attending a school or facility on five or more different days in a given school year or residing on the premises of a school or facility regardless of whether the child attends classes or receives child care, at any age or grade through grade 12, should be processed as a new enterer or transferring student as appropriate. Such residents and visitors for the purposes of these rules are in attendance. This includes children of owners or employees of a school or children's facility if they fit the above criteria.

Home-schooled, private, or special education students or students in other non-traditional educational settings are subject to these rules if they meet with an instructor in a school building for any amount of time on a regular or irregular basis, but at least five times per school year; or they participate in sports or other activities through a school-sponsored program at least five times per school year.

Home-schooled students are subject to the requirements of a new enterer if they attend a school part time (on at least five separate days during a school year), even if only for instruction in one specific subject, involvement in special interest activities such as athletic or music programs, or receipt of counseling or tutoring.

For facilities providing drop-in child care, a child may attend on up to four different days without a Certificate of Immunization Status on file. Before allowing attendance on the fifth visit, a Certificate of Immunization Status must be provided showing at least one dose of each required vaccine or an appropriately signed exemption.

Homeless students

Students who are registering at a school or children's facility and are considered by the district or the school/facility to be homeless must be allowed at least 30 days to obtain an immunization record. These children are treated as transferring students, even if they are not transferring from another site.

Under Oregon Administrative Rules, if a student is considered homeless, school staff are required to help the student's family compile an immunization record. This includes requesting records from a previous school or a previous medical provider, and requesting a record from Oregon Immunization ALERT IIS.

If immunization records are not received, the school/facility should include the student on the Primary Review Summary report. Schools may also choose to issue a No Record Exclusion Order to the parent with an exclusion date of not less than 30 days after initial attendance if mutually agreed between the school and the local health department.

Techniques for Keeping Mailing Lists Current

Local health department immunization coordinators maintain their county's school and children's facility site lists in the school exclusion module in IRIS. The local health department is responsible for identifying and adding new sites that must complete the immunization review process, deleting or inactivating old sites, and correcting information that has changed.

Identifying New Sites

A list of schools can be accessed through the Oregon Department of Education website at www.ode.state.or.us (the directory can be found at www.ode.state.or.us/search/results/?id=227). The Department of Education school directory contains all public schools and some private schools.

The Oregon Child Care Division maintains a list of certified family child care homes and centers. The Immunization Program will send local health department school law contacts the list of certified child care two to three times a year.

To identify new programs, check the lists of schools and child cares, and look for ads in newspapers, yellow pages in phone books, flyers in grocery stores and on the internet. Word of mouth is also a good way of identifying new programs, especially preschools. Preschools are sometimes difficult to find, as they are often not certified child cares, but they are required to complete the annual immunization review and exclusion process.

Check with the sanitarian(s) responsible for inspecting schools and child care programs in your county, and compare lists of sites. One way to identify new programs is to ask sanitarians if they can notify you of any new children's facility or school that they inspected throughout the year.

New programs should be contacted as soon as they have been identified to ensure that they are aware of the school law requirements, have the necessary tools (handbook, CIS forms, transparent overlays) to complete the immunization review process and are knowledgeable about what their responsibilities include.

If a site opens or is identified in January or later, enter the information into IRIS and check the *New Site-Not Yet Reporting* box so that it will be ready

to be included in next year's cycle but not this year. Notify new sites of any training opportunities you provide.

Child care certifiers may or may not mention immunization law requirements. Local health department staff will need to provide the necessary information and training to child care programs.

Updating Mailing Lists

One way to update your list is to do mailings to the schools and children's facilities that report to you.

Mailings could include information about:

- ordering additional CIS forms
- current immunization clinic schedules for you county

After completing a mailing, you should receive updated mailing information such as address changes and closed programs. Many programs will also let you know if their contact person for immunization reporting changes. This will likely be less expensive than mailing the annual immunization reporting packets and having them returned to you as undeliverable.

Training Suggestions for Schools and Children's Facilities

New schools/facilities and new people responsible for the immunization review process can benefit from training. Staff changes in schools/children's facilities are common. Preschools frequently depend on parent volunteers, and the volunteer for immunization review often changes every year. Site directors move and internal demands on staff can change who will be doing the immunization review process.

Children's facilities and schools often have questions about:

- how to evaluate records
- how to complete the PRS
- how to help parents obtain records
- who has a 30 day grace period and who doesn't

Training for schools/children's facilities staff can occur in a variety of ways.

One-on-one training works well if you have time. Sitting down with staff, reviewing their filing system, looking at CIS forms on file, and knowing the ages of children served allow you to tailor the training to the site's specific needs.

Training can also be done in groups. Consider partnering with your local ESD or library to host a two-hour training where you can go through the immunization review process, discuss how to complete forms, and answer questions. The state Immunization Program has a power point program that can be used for county training that you can customize for your county.

Most staff at certified child cares must attend trainings through the year, so consider including a certificate of attendance or other documentation for those participating in your training. Certificates are available from the Oregon Immunization Program for 1 hr, 1 ½ hr and 2 hr. trainings.

It is not easy finding a time and location where most people can attend. Scheduling several trainings at different times such as morning, afternoon, and possibly an evening or Saturday may increase participation. You might choose to do a quick poll to see when people are available. Oregon Immunization Program staff is always willing to assist with training if asked. Please give at least two weeks advance notice if possible.

Tracking Primary Review Summary Forms

There are four Immunization Primary Review Summary (PRS) forms that schools and children's facilities must complete annually.

- Pages 1 and 2 are due in January, 35 days before Exclusion Day.
- The updated Page 2, Page 3, and Page 4 are due in late February or early March, 12 days after Exclusion Day.

It is important to keep track of PRS forms as they are received in your office. Most counties use a tracking tool, either paper or electronic. You can also track information about the PRS forms in IRIS School Exclusion Client using the notes field and checklist boxes. Some items to include in your tracking tool are:

- Name of site
- Date that the PRS pages 1 and 2 were received
- Date that the PRS pages 2 (updated), 3 and 4 were received
- If the PRS forms were completed correctly
- If the site included copies of incomplete/insufficient records (if necessary)
- Space for notes if follow-up phone calls are needed for inaccurate information or missing reports

Reviewing Primary Review Forms, Sections A-C

When you receive immunization reports from schools and children's facilities, you will need to review the reports to make sure they are complete and accurate. Contact the site immediately if the report needs correction or if something is missing, such as copies of Certificate of Immunization Status forms for children with incomplete immunizations.

Page 1, Section A

The Primary Review Summary Page 1, Section A, numbers needs to balance. The adjusted enrollment should equal the total enrollment minus the children not counted. The adjusted enrollment should also equal to the total number of children who are in the categories of complete/up-to-date, nonmedical exemption, temporary medical exemption, permanent medical exemption, incomplete/insufficient, and no record.

Page 2, Section B

Children who are incomplete/insufficient, have no record, or have a temporary or un-reviewed medical exemption should be listed on Page 2, Section B. Parents/guardians name and address, and child's date of birth and/or grade should also be there.

- For children who with incomplete/insufficient records, there should be copies of the CIS forms or printouts from ALERT IIS or printouts from an approved school computer tracking system.
- For children with un-reviewed medical exemptions, there should be medical exemption documentation from a physician.
- For children with no record, the "check here if no record" box should be marked on Section B of the Primary Review Summary.

You will need to know the grade level for each child listed in Section B because you cannot always go by the birthday to determine a student's grade. If there is no indicator or you have a program that doesn't assign grade levels, assume a five year old child is a kindergartner if they were five by the first of September of the school year.

Page 2, Section C

The local health department completes this section after determining which children need exclusion letters and for what vaccines. If the

school/children's facility completes this section, correct the information as necessary.

Some children that the school/facility lists on page 2 may not need exclusion letters. Some sites use the transparent overlays or the ALERT IIS forecast to assess children's immunization records. The overlays and ALERT IIS are good screening tools to determine which children are up-to-date on immunizations. However, if a site just uses the overlays or ALERT IIS and does not double-check incomplete records against the Primary Review Table, it is likely that some children are actually up-to-date if it hasn't been long enough to require the next dose of vaccine according to school immunization law. See the [page 26](#) for more information about reviewing immunization records.

Reviewing Primary Review Forms, Sections D-G

Page 2, Section D

Sections D-G are completed after exclusions orders have been sent and children's records have been updated. These sections are due to the local health department 12 days after Exclusion Day. Sites with no exclusion orders can complete page 3 and page 4 of the PRS (Sections E-G) along with page 1 and finish the process with just one step.

It is important that the information is complete. There should be a date by each student's name indicating when the updated information was received at the school/facility. The school/facility should indicate whether the student was excluded or not. The number of children excluded at the site is then entered into IRIS in the appropriate box. The IRIS program will provide a total number of children excluded for the county when all the information has been completed.

Sites that submit reports from approved computer systems may not complete Section D. If they don't, have them call and report the number of students that were excluded.

Page 3, Section E-G

Sections E, F and/or G should be completed by 12 days after Exclusion Day. Please check the numbers carefully. The All category cannot be bigger than any of the individual vaccine categories. For Sections E and F, if there is an exemption for any student there should be numbers in the nonmedical exemption by vaccine part of the report. Check the "No

Stdnts” box if, for example, the school has a kindergarten but has no kindergartners during the current school year.

If any of the above was not included in the report sent to you, contact the site right away to obtain the necessary information.

Reviewing Primary Review Forms, Sections H

Page 4, Section H

Section H should be completed by 12 days after Exclusion Day. This section reflects the immunization status of every child attending the school in grades K – 12. The numbers are determined in the same way they are for section F and G. Because Hepatitis A vaccine is being phased in at this time, it is important that the number of students required to have hepatitis A is noted since not all students are required to have hepatitis A until 2021. If a school only has students in K, they need to complete both Section F and Section H even though the numbers are exactly the same.

Information in Section H is the data used to calculate the immunization rates by vaccine that the school is required to make available to the public via the website and their office and distributed to parents of students attending their program. Program with children less than school age are required to make available the data from the Section E report.

Reviewing Immunization Records

Remember: Review the records as required by school law and not what could be given clinically.

The Immunization Primary Review Table (OAR 333-050-0120) contains the specific immunization requirements for school and children's facility attendance.

Exclusion orders can only be written for a vaccine in order to comply with school law requirements, which may be different from when a vaccine can be given clinically.

Assess records based on the date of the report in January. For example, if a child is one month old in January when the report is due, do not issue an exclusion order for DTaP, etc., just because they will turn two months old by Exclusion Day in February. The exception to this rule is Hib. Do not issue from an exclusion order for Hib if a child will be turning 5 years of age by Exclusion Day that child should be counted as complete.

How to use the Primary Review Table:

1. The first column on the left shows the vaccine. Go to the page that corresponds with the vaccine you are evaluating.
2. The second column shows how many doses are listed on the child's record for that vaccine. Go down this column until you get to the first row that corresponds with the number of doses on the child's record.
3. Read the criteria from top to bottom. Stop at the first statement that matches the child's record. Do not try to find the statement that best matches a child's record, because sometimes more than one statement will match—always stop at the **first** statement that matches the child's record.
4. Read to the right. The column to the right of the matching statement tells you the child's category. The far right column shows whether a shot is due now.

5. Continue until you have assessed each vaccine series. If a child is complete for all series, the child's overall category is complete. If he or she is incomplete in one or more categories then the overall category is incomplete/insufficient. Students who have a nonmedical exemption for some vaccines but are incomplete for others have an overall status of incomplete.

When to use Overlays:

Overlays can be used to initially assess records if they are sent to you on a CIS form. The squares are color-coded and will identify which boxes should contain a date for vaccine based on the age of the child. This tool is particularly valuable for staff new to the process of assessing records for school law purposes. However, children who appear incomplete based on the overlays may up-to-date and not due for additional doses yet according to the school law requirements. Be sure to double check against the Primary Review Table for children who appear to be incomplete.

When to use ALERT IIS:

All schools/children's facilities can legally access ALERT IIS for student records if they have signed up with ALERT IIS. If a program does not use ALERT IIS after 12 months, they are inactivated and need to reinstate with ALERT IIS. Programs can call ALERT IIS Customer Service at 1-800-980-9431 with questions.

If you have time, there is value in looking up children in ALERT IIS to see if they are up-to-date or if there is a record for a no record child. If there is additional information, print out the record on a CIS form and mail the copy back to the school/children's facilities along with the copies of any exclusion orders sent. Mark any changes in status of the child on Section C of page 2 so the school/facility is aware of the additional information.

Records from approved immunization tracking systems:

The Oregon Immunization Program approves school/facility computer immunization assessment and tracking systems. Approved programs assess immunization records based on Oregon school law specifications. When sites using approved computer programs submit their Primary Review Summary reports, they will include a printout listing children with incomplete or insufficient immunizations and the assessment for each vaccine. These sites do not need to send copies of records. You can use the assessment printouts to determine what needs to be entered for the

child's exclusion order, and you do not need to review the approved computer assessments against the Primary Review Table. A list of approved computer systems is included in the reporting packet each year. It is important to identify what computer systems are being used in your schools to confirm that they are using an approved system. Be aware though, some school staff may use an alternative name for their system.

School tracking systems should be assessing vaccine requirements correctly and exclusion orders should be written accordingly.

If you find an error in the computer assessment or there are questions about the reports provided by the school, call the Oregon Immunization Program immediately so that corrections and/or issues can be handled quickly and directly with the programmers.

Common Assessment Errors

The following are common situations that can be easily overlooked and can lead to assessment errors:

- Evaluating dates for MMR, Varicella or Hepatitis A when given before the first birthday—Dates of doses are acceptable if the vaccine(s) were received four days prior to the first birthday; do not issue an exclusion order for this situation. Exclusion orders need to be written for MMR, Varicella or Hepatitis A if dose(s) were received prior to the above described situation.
- It has been at least 6 months since the first Hepatitis A dose but not 12 months allowed by law—Exclusion orders are issued for the 2nd dose of Hep A when it has been **12 months** since the first dose. School law does not address minimum spacing between doses, so two doses of Hepatitis A are acceptable for school attendance purposes even if less than 6 months apart.
- When there is a vaccine shortage for a specific vaccine and there has been written notification that the vaccine will not be required for that school year, exclusion orders cannot to be issued for that vaccine.

- The third doses of Hepatitis B and Hib are not required until the child is 18 months of age. The first dose of MMR is not required until the child is 15 months of age. First doses of Varicella and Hepatitis A are not required until 18 months of age.
- If a child has received 5 doses of DTaP and 4 doses of Polio they are considered complete even if the doses were all received before age four. School law does **not** specify that one dose of Polio and/or DTaP must be received at or after age 4.
- If MMR and Varicella have been given less than 28 days apart, no exclusion order should be issued, as there is no minimum spacing between a dose of MMR and a dose of Varicella in the school law.
- There are minimal spacing requirements of 24 days between two doses of MMR and two doses of Varicella in the school law. For example, an exclusion order should be issued if there are less than 24 days between a child's two doses of MMR.
- The only time an exclusion order should be issued for a second dose of Varicella is if the child received the first dose at or after 13 years of age or before 1 year of age.
- When a vaccine is being phased in, exclusion orders can only be written for the grades required to have the vaccine for that specific school year. (Reference the Primary Review Table for affected grades by year).

When a family brings in an exclusion order with their child, encourage the family to obtain all recommended vaccines, not just the ones required by school law.

Processing Exclusion Orders

Printing exclusion orders:

The IRIS School Exclusion Module allows information to be typed in to generate exclusion orders. The second half of this handbook describes the IRIS School Exclusion module. Contact the Oregon Immunization Program if you have questions or if you would like training for you or your staff.

Some schools, districts, or ESDs have the capacity to print exclusion orders directly from their data system. If available, these systems can save time.

Incorporate a system for double-checking the exclusion letters. It is easy to make an error, and it is critical that information be as correct as possible because this letter is a legal document that restricts a child from attending school.

Start as early as possible in entering and printing exclusion letters. This process can take longer than expected, as there may be delays in getting reports from some sites, printing problems can occur, and time is needed to prepare the mailings for parents and schools/children's facilities.

Two copies of the exclusion orders must be printed: one to send to the parent, and one to send to the school/children's facility. If you use IRIS to generate exclusion orders, printing copies for yourself is optional.

What to send to the parent:

- Exclusion letter
- Optional cover letter with clinic dates and what to do to make sure their child isn't excluded
- Optional exclusion order explanation in English/Spanish (available from the Oregon Immunization Program)

What to send back to the school/children's facility:

- Copies of all of the exclusion orders for that site
- Primary Review Summary Page 2 with Section C completed by the county health department
- Copy of the cover letter that you included with exclusion letters mailed to parents

- Letter explaining the next steps for the school/children's facility and when the updated Page 2 (Section D) and Page 3 (Section E, F, and/or G if applicable) are due
- Approval for medical exemptions reviewed for the site
- If the school/facility sent you the original CIS form, make a copy for yourself and send the original back to them

CIS Form and Exemption Documentation

Vaccine History

Parents or guardians should always be encouraged to sign the CIS form. If your county clinic has provided all of the vaccines received by the child, you may sign the CIS form, but in most cases, it is best for the parent to sign and date the form. Whoever signs the form is guaranteeing that every vaccine date is correct and that the child has received the required vaccines. Ask the parent/guardian to sign and date the form before they leave your clinic to ensure that everything is completed, and remind the parent/guardian to return the CIS form to the child's school/facility. The parent/guardian should also sign for history of chickenpox disease.

Medical Exemption

Medical exemptions must be reviewed by an authorized representative of the health department. A physician must provide the information specified on the back of the CIS form. This documentation is submitted to the school or children's facility, and the school/facility will in turn send the information to the local health department. The "authorized representative" of the health department can be anyone who has researched the exemption and determined whether or not it is an appropriate medical exemption using ACIP standards.

Medical exemptions are either permanent or temporary.

A permanent exemption means the child will never be required to have the vaccine. Permanent exemptions must conform with the ACIP guidelines for true contraindications for vaccinating a child.

Temporary exemptions means the child cannot receive the vaccine now, but it is anticipated that he or she will be able to receive the vaccine in the future. An expiration date of when the child's record will need to be reviewed must be indicated. The Medical Exemption Review Summary Form can be used to track medical exemptions and record the date of next review for temporary medical exemptions.

It is important to contact the medical provider's office and speak to a clinical staff member to determine what the medical condition is if it is not obvious on the submitted documentation. If an exemption is not granted, contact

the school and the parent so that they will know that an exclusion order will be issued.

Physicians will sometimes submit medical exemptions because the parent does not want their child to receive a specific vaccine or the child is on an alternative schedule for immunizations. These are not acceptable medical exemptions. Contact the physician, parent, and school to let them know that the medical exemption has been denied. The parent must choose to get the vaccines for their child or sign a nonmedical exemption.

Nonmedical Exemption

This section may be signed by a parent, guardian, or the student if he/she is 15 years of age or older. nonmedical exemptions require the parent, guardian or student to specify individual vaccines or all vaccines. Nonmedical exemptions must be accepted even if the child has received vaccines before or after the signing of the exemption. Finding additional doses in ALERT IIS dated after the signing of the nonmedical exemption does not nullify the exemption. The nonmedical exemption would not be applicable anymore only after the child has received all of the doses for the series and would therefore be complete, or the parent chooses to remove the nonmedical exemption.

The schools and children's facilities only need to send copies of nonmedical exemption CIS forms if the child has a nonmedical exemption for some vaccines and is incomplete for other vaccines or where they have completed the CIS form nonmedical exemption but have not attached a Vaccine Education Certificate.

Parents of children with nonmedical exemptions need to understand that their child will be considered susceptible and if there is an outbreak of disease in the community, the child may have to stay at home until risk of exposure is past.

Common Problems with CIS Forms

Frequent problems with CIS forms include

- missing signatures
- undated
- incorrect birthday
- dose dates are out of order
- doses given before birth
- dates are unreadable
- child has a complete vaccine history but the nonmedical exemption is also signed

When families bring CIS forms into your clinic, make every attempt to ensure that these errors are corrected before the form is turned into the school/facility. Schools and facilities work with the parent to correct these errors, but occasionally it is necessary to send an exclusion order to motivate the parent to finally make the corrections. Any corrections you can do at the clinic will make it easier for the schools/facilities to do their part of the process.

These problems can often be corrected by the school/facility staff or local health department by printing a record from Oregon ALERT IIS.

Too Many Exclusion Orders for No Record

Children in certified day cares, preschools, and Head Start programs are always considered new enterers and should not be allowed to start without a completed CIS form showing at least one dose of each vaccine required for their grade or an exemption. Children's facilities with multiple no record children should be contacted and possibly scheduled for an onsite training or referred for a validation survey. See page 38 for more information.

Encouraging these programs to use ALERT IIS will reduce the number of no record children in this age group. Many programs think that they have to give the parent a 30-day grace period so clarifying this misunderstanding can reduce the number of no record exclusion orders being mailed.

Obtaining Primary Review Reports from All Sites

Obtaining the Primary Review Summary reports from all sites can be challenging. Here are some strategies that counties have found useful in getting the PRS reports in:

- Call the program before the report is due. Some counties call when the reporting packets are sent out in the fall and again the week before the report is due in January. This will increase the percentage of reports that come in on time.
- Call soon after the reports are due if you have not yet received the report for a site. Some counties like to call the day after reports are due, and some prefer to wait a few days or until the following week.
- Some programs will voluntarily call and let you know they are going to be late. Be sure to document when they promise to get the report to you so you can follow-up if it is not received.
- If feasible, offer to go out to the site to assist with the report or pick up the paperwork. Sites generally prefer to bring the report to you instead.
- Accept faxes if possible. This makes it easier for some sites, and you will get the information in a timelier manner. If faxed, document the appropriate information in Section C of the PRS and then make a copy of that page to mail back to the site when sending out the copies of the exclusion orders.

Document whatever contact you have with a program, whether you talk in person, leave a message, or if you call and there is no answer.

Documentation of contacts is necessary if the site fails to turn in the PRS and you need to refer the site to the Oregon Immunization Program because of noncompliance with immunization law. To report a site in noncompliance, you must first establish at least a four-working-day time frame for the school/facility to comply and turn in the report.

Once in a while you will have a site that will call and ask for an extension. You are not required to give them an extension, but you can do so **if the site can still get the report to you in a time that will allow you to process the information and mail any exclusion orders as required by state law (the first Wednesday in February).**

You may have sites where you leave messages, get no return phone call, and do not receive the report. You can try leaving a message with a specific date and time that you must hear back from them or you will have

to report them to the State as being in noncompliance with immunization laws.

Double check with the Certified child care list, Department of Education or on the internet to see if the program is still on their lists and if you have the best phone number. Depending on the location, check with local schools or a business close by to see if the program is still operational. Mapquest and Google will list businesses close by the address entered in for a search. Church offices and Licensing Specialists for the Office of Child Care and also provide insightful information.

Some of these steps may have to be repeated when trying to get the follow-up report back from sites as well.

Options When You Have Tried Everything

You have one more option if you have tried all of the suggestions above and still have not received the report—you can refer the site to the State Immunization Program as being in noncompliance with Oregon immunization law.

Submit documentation of contacts made with the site, including any conversation detail, dates messages were left, and the establishment of a four-working-day timeframe to turn in the report, to the Oregon Immunization Program School Law Coordinator. Please attempt to make at least three contacts before making the referral. This information can be entered into the Notes tab for the site in IRIS School Exclusion Client so that it is easy to retrieve. Documentation can also be submitted via email, fax, or regular mail. Please refer sites in non-compliance for failing to turn in the Primary Review Summary page 1 by the first Wednesday in February or earlier. Refer sites for failing to turn in page 3 by 10 days after the report is due.

The Oregon Immunization Program will attempt to contact the program again to reaffirm the importance of submitting the report and the consequences for failing to do so. The procedures specified in OAR 333-050-0095 will be followed, beginning with a certified letter, notification of the Child Care Division certifier, superintendent, and/or Department of Education as appropriate, and ending with referral to the State Attorney General's office and civil penalties, if necessary.

If there are children needing exclusion orders when you receive the report for this site, it may be after the mailing deadline for exclusion orders. Contact the Oregon Immunization Program to have the mailing date changed. The exclusion date for this site will change to two weeks after the mailing date.

Compiling the Final Report

The Oregon Immunization Program reviews each report that is entered into IRIS School Exclusion Client, and will contact you with any questions. The Immunization Program completes the final statewide report from the information inputted in IRIS. Data entry should be completed by the date listed in the calendar. Information can be entered into the program as reports are received or can be entered all at once. Sometimes the most difficult part of the report is obtaining accurate information from the schools/children's facilities. You may need to go through many of the steps listed above to obtain the final report. Information can be taken over the telephone and you can fill in the blanks on the copy in your office.

Sections E/F/G of the PRS contain information on just a part of the school enrollment as opposed to Section A, which includes all of the children in their site. Section H includes the information for all of the students in grades K-12. Some sites also have questions about how to count the number of children in each category so you may need to walk them through the count. Always double-check the numbers when they come in to be sure they make sense. You are encouraged to consult with Oregon Immunization Program staff if you need assistance.

After all of the information has been entered into IRIS, the state reviews the information and may ask for clarification on of the data if the numbers don't seem to add up or if there is missing information.

After the reports have been reviewed, a tool is then developed and sent to all of the schools/children's facilities in the state to allow them to verify the data and to create graphs from that data for their specific program that they can then share with their parents and post on the website as required by law.

When all of the reports have been reviewed and verified, then additional graphs are generated by the state and distributed to the counties. The graphs show the immunization rates by vaccine for all school-age children attending school in that county and less than school age based on information from ALERT IIS. These graphs are then required to be shared with every school/children's facility in the county. You are encouraged to send both graphs to all sites to ensure that the program has the information that they are required to share with parents. You can just send one or the other of the graphs

if the program only has children in one or the other age group but not both. The graphs must be distributed by May 15th.

Validation Surveys

Each year, local health departments identify programs that they believe will benefit from a site visit from the Oregon Immunization Program. Validation surveys are required by CDC to ensure that schools/facilities are accurately reporting and not based on just what is sent into the county.

Programs can be selected for a variety of reasons, including errors in submitted paperwork, not excluding children when required, confusion about the process, and sometimes, if everything looks too perfect. Oregon Immunization Program staff schedule the surveys at the selected site with the county immunization school law coordinator. The state staff person generally takes the lead during the survey, but input from the county immunization coordinator is needed so that the most important issues can be addressed at the time of the visit. Some input that is helpful includes whether the Primary Review Summary reports arrived on time and if the paperwork was correctly completed.

Validation surveys are an excellent time to provide one-on-one training for the school/facility, stress the importance of the immunization review process, and answer any questions. It is also a good opportunity to encourage sites to use ALERT IIS and share information about other programs in the health department.

Surveyed sites will receive either a letter telling them they are in compliance with immunization law, or a letter detailing the steps that they need to take in order for their program to be in compliance. A reasonable date will be established for sites to comply. You may be asked to do follow-up, but in most cases, the Oregon Immunization Program handles the follow-up as well.

Immunization Record Information System (IRIS)

School Exclusion Module Manual

August 2016



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Chapter 1—IRIS Overview and Demographics

Objectives

- Enter FamilyNet
- Identify the components of IRIS School Exclusion
- Exit the system

Introduction

This section will help you understand how to enter and exit FamilyNet and gives you a quick look at the functions you will find.

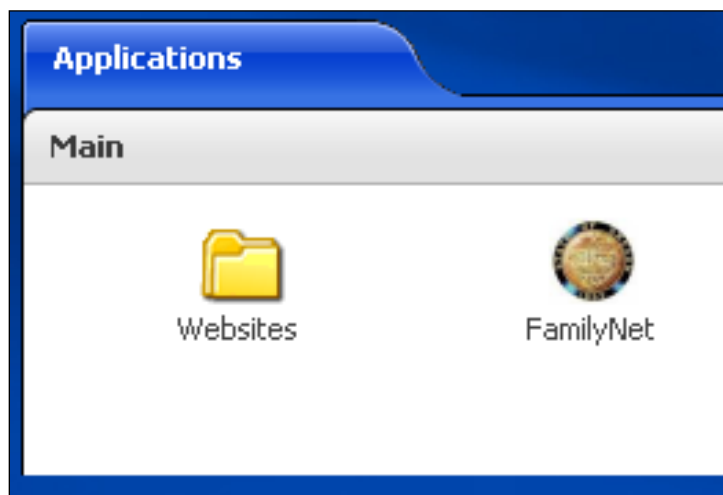
With the School Exclusion Module, you will see three icons on the IRIS tab.

Logging On To FamilyNet

1. Turn on your computer and log on to your agency's network.
2. Open up the internet and go to <https://dhs.oregon.gov/vpn/index.html>. You will see the following screen.



3. Enter your User name and Password, and click the "Log On" button.
4. A window will appear containing icons for your authorized applications. Click on FamilyNet.



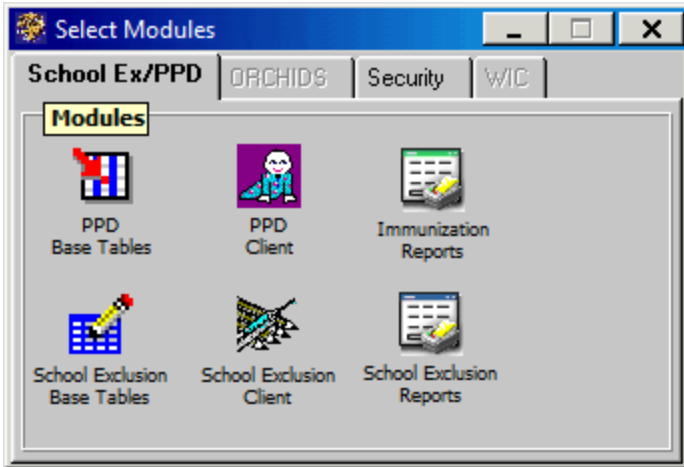
5. The Welcome to FamilyNet Log On screen will appear.



6. To log in, first type in your User ID. The User ID is usually comprised of the first letter of the user's first name followed by the user's entire last name.
 - Logging on with a unique user name allows the system to track who is performing which tasks.
 - Your user ID will authorize you to access functions within IRIS that are specific to your job and location.

7. Tab over to the Password field or click in the Password field. Type in your password.
 - Your password should be a unique combination of letters and numbers known only to you. Do not share your password with co-workers.
 - Your password must be at least six digits long and begin with a letter.
 - Your password is case-sensitive.

8. Click to complete your log on.
 - The Select Modules screen will appear.
 - The School Ex/PPD tab will be showing.



- Other program tabs (e.g., WIC, ORCHIDS) will be activated if your log on status allows it.

Finding Your Way in IRIS

- The Select Modules screen will allow you access (if your log on allows) to different areas of the IRIS system. The School Exclusion Module has three icons associated with it.



School Exclusion Base Tables is where State users maintain county-specific information: authorized signatures, checklist options, grade types, insufficient reason wording, site types, exclusion dates and vaccines. While this information is easily updated, it can only be edited at the state level.



School Exclusion Client is where all site information is entered and stored, including site demographic information, primary review data, follow-up data, notes, and site contacts. Additionally, this is where you will add students to a site and enter relevant student demographic information.



School Exclusion Reports allows you to run needed reports. This tab will allow you to batch print Incomplete/Insufficient and No Record Exclusion Orders by site or for the entire county. Also, checklist reports, mailing labels and a County Immunization Status Report can be generated. State users will generate statewide coverage reports here.

Logging Off FamilyNet

Log off FamilyNet by closing all open screens.

- Remember to close the Select Modules screen.
- Log off when away from your computer or lock your computer.

One of the key differences between the School Exclusion Module and the rest of FamilyNet is that it does not use the Client Master. Associating a student with a site and adding their record will not alter any of the information in the client master, even if the student has a preexisting IRIS record.

Another major difference is that the School Exclusion Module relies on sites as its first level of searching. You will be unable to access a student record without first selecting the site where student is associated.

Chapter 2—School Exclusion Overview and Site Demographics

Objectives

- Search for a site
- Enter site data on the Site Maintenance screen
- Add a new site
- Change site demographic information
- Delete or inactivate a site

Introduction

In this manual, schools, preschools, certified child care facilities and Head Start programs are referred to collectively as sites.


To find the sites for your county that have already been entered into the school exclusion client data base you will need to perform a search. Please note that search results will also include inactive sites but they are identified with a gray bar on the lists.

Performing a Site Search:

1. Double click on School Exclusion Client icon.



The Site Maintenance screen is opened.

2. Click on the  button to display the Site Search screen.

SITE SEARCH

Note: The % symbol acts as a multiple character wildcard

Site Id: Site Type:

Site Name:

Site ID	Site Type	Name	Address

Search New Search Add New Site Return W/Site Return W/Q Site

Site Search Screen

- Search criteria appear at the top of the screen. Information can be entered in any single field or all fields. The search results will narrow as more fields are filled.
- The results of the search will be displayed in the large white box in the lower part of the screen.
- You may put in all of the site name, just a few letters, or only the first letter.
- The % symbol acts as a wildcard and can be used instead of a site name.

The searchable fields are Site ID, Site Type and Site Name. None of the fields is mandatory; however, at least one data element must be entered into a field for a search to take place. The more information that is entered into these fields, the more specific your search will be. For a new search, it is better to do a broad partial search to keep from missing a site.

Tip: Enter % in the site name field to list all of the sites in the county or the selected category.

3. Enter site information or % into at least one field.

Fields on the Site Search screen:

- Site ID: An agency-entered local site ID number. Some counties choose to use this field, but most do not.
 - Site Type: If you are searching for a specific type of site (children's facility, Head Start, online school, private school, public school), you can search on this field. Results will be limited to sites of the searched for type only.
 - Site Name: If only one letter is entered into this field, all site names that begin with that letter will be retrieved from the database. If a specific name is entered, only those sites with that name will be retrieved from the database.
4. Click the button, or press Enter.
 - The sites found in the database matching your search criteria will be displayed alphabetically in the results box.

SITE SEARCH

Note: The % symbol acts as a multiple character wildcard

Site Id: Site Type:

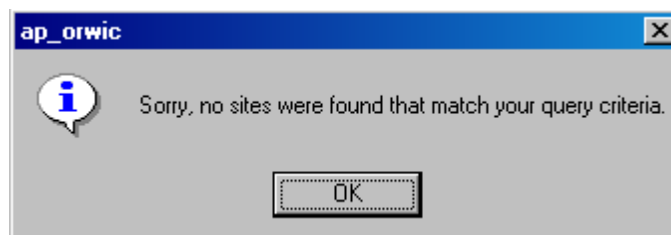
Site Name:

Site ID	Site Type	Name	Address
	PUBLIC SCHOOL	AUTUMN ELEMENTARY	7977 FALLING LEAF DR PORTLAND OR, 97232
	HEAD START	SEASONAL HEAD START	PO BOX 1234 PORTLAND OR, 97232
	CHILDREN'S FACILITY	SPRINGTIME PRESCHOOL	123 FLOWER WAY PORTLAND OR, 97232
	ONLINE SCHOOL	SUMMER ONLINE SCHOOL	456 N INTERNET BLVD PORTLAND OR, 97232
	PUBLIC SCHOOL	THE OLD SCHOOL HOUSE	111 OLD SCHOOL HOUSE RD PORTLAND OR, 97232
	PRIVATE SCHOOL	WINTER ACADEMY	9 N SNOWFALL ST PORTLAND OR, 97232

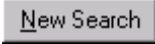
Search New Search Add New Site Return W/ Site Return W/ Site

Site Search Results

- You may need to scroll down to view all sites listed. Scroll bars will automatically appear when there are more results than can be displayed in the results box.
- If there are no sites that match your search criteria, you will see the following message:

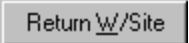
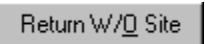



Click OK to close the message.

- If the list of sites is long and you want to narrow your search using additional information, or if no sites were found and you want to expand your search, click on the  button to clear the screen and re-enter site information.


Returning to the Site Maintenance screen

There are three ways to return to the Site Maintenance screen from the Site Search screen.

1. After completing a search, click on the appropriate name and click . This returns to the Site Maintenance screen with site information. You may also double click on the site to return with the site's information.
2. Click . This returns to the Site Maintenance screen with no site information.
3. Click . This returns to a blank Site Maintenance screen, ready for data entry.

Entering a New Site

Before adding a new site to the database, it is recommended that a site search be completed. This helps prevent creating duplicate sites in the system.

1. Double click on the School Exclusion Client icon.
2. Click the  icon to open the Site Search screen.

SITE SEARCH

Note: The % symbol acts as a multiple character wildcard

Site Id: **Site Type:**

Site Name:

Site ID	Site Type	Name	Address

Site Search Screen

3. Perform a search as described earlier.
4. Click or press Enter. The button is now enabled.
5. Review the results to see whether the site is in the system.
6. If the site is there, select the site and click to get back to the Site Maintenance screen.
7. If the site is not in the results area, click the button. This displays the blank Site Maintenance screen, ready for data entry.
8. Complete the demographic fields in the Site Maintenance screen.

Tip: Yellow fields are mandatory.

Name: This is the name of the school, preschool, certified child care or Head Start program.

Type: Select a site type from the drop down list.

ID: This is for a local site ID number, if you choose to use this function.

Grades/Ages Served: You will choose to enter only one of these fields. For children’s facilities, click the Age button and enter the ages in the Grades/Ages Served field. For schools, click the Grade button and enter the grades in the Grades/Ages Served field. For example, if the site serves children from six weeks to twelve years, you could enter 6wks-12yrs in the ages served field. If a school has children from preschool through grade six, you could enter PK-6 in the grades served field. Eliminating spaces between numbers allows for more information to be entered as there is limited space available.

Area/Phone/Extn: Enter the site’s main phone number. No parentheses or dashes are necessary. There are fields to enter additional phone numbers under the Contact tab.

Inactive date: This field allows you to enter a date if a site has closed or is no longer required to report and the site has data associated with it. For sites that were entered in error and have no students associated, you may delete the site. Enter this date as MM-DD-YY or MM/DD/YY. M/D/YYYY is also acceptable.

Mailing Label Attn: Add a name or title if you want it to appear on the mailing labels.

Tip: Some counties list the name of the person at the site who should receive the immunization reporting information. Some counties put a generic title such as “Immunization Recorder” or “Administrator.”

Address Section:

The screenshot shows a form titled "Address" with the following fields: Str# (text input), Pre Dir (dropdown menu), Str Name (text input), Str Type (dropdown menu), Post Dir (dropdown menu), Zip (text input), City (text input), and State (dropdown menu). The Str# and Zip fields are highlighted in yellow.

Str#: The street number is entered field. If the site has a PO Box, leave this field blank.

Pre Dir: The pre-direction is a drop down list for the street direction when it appears before the street name; e.g., NE Broadway.

Str Name: Enter the street name in this section. If the site uses a PO Box, enter it here: e.g., PO Box 142.

Str Type: The street type is a drop down list.

Post Dir: The post-direction is a drop down list for the street direction when it appears after the street name; e.g. Winter Street NE.

Zip: Enter the zip code in this field. The city and state will automatically fill in for some areas when the zip code is entered. A list of cities will appear when there is more than one city connected to a zip code, allowing you to select the correct choice.

City: If a city is entered instead of the zip code, the state and zip will automatically fill in. A list of cities, states and zip codes will appear if there is more than one possibility.

State: State will auto fill if either the zip code or city is entered into the system.

Grade Check List: This field is used to indicate which grade levels you expect to receive follow-up data on after the exclusion date.

<input type="checkbox"/>	PRESCHOOL / CHILD CARE / HEAD START
<input type="checkbox"/>	KINDERGARTEN
<input type="checkbox"/>	7TH GRADE
<input type="checkbox"/>	FULL SCHOOL GRADES K-12

Check each box that is applicable for that site.

Computer System Used: This is a drop down menu. Choose the computer system used by the site, or unknown or other if applicable.


Primary Contact and Administrator: Fill in the primary immunization contact and administrator's information.


Primary Contact	
Last Name:	First Name:
<input type="text"/>	<input type="text"/>
Email: <input type="text"/>	
Administrator	
Last Name:	First Name:
<input type="text"/>	<input type="text"/>
Email: <input type="text"/>	

Tip: These fields link to the Contact tab and the Site Contact Report. You can update the information on the main demographic screen or in the Contact tab.

Created/Modified: Once a record is created and saved, the date and user ID of the user that created it will be auto filled. The modified box will be updated each time a change is made to the Site Maintenance screen and saved.

	Created	Modified
Date:	<input type="text"/>	<input type="text"/>
User ID:	<input type="text"/>	<input type="text"/>

9. After you are finished adding all of the information for new site, click on the save icon .
10. If the site is a public school than when you click save, a message will pop up that says School District is required. Click OK and then enter the school district using the drop down menu.



11. To add a new site, from the Site Maintenance screen, click on the site name field. The add button  on the toolbar is now enabled. Click the add button and you will get a new site demographic screen, ready for data entry.

12. If a site has been identified but will not be reporting during the current review cycle because they are a new site and will be reporting next year, they can be entered into the system. Check the New Site – Not Yet Reporting box **New Site - Not Yet Reporting** to exclude them from the reports being run this year.

Tip: The New Site – Not Yet Reporting checkbox can be used for sites with no children this year, but which may have children next year. Checking the box subtracts this site out of reports temporarily, but the site will remain active to be included in mailings and for reporting in future years.

Changes and Additions to Site Demographics



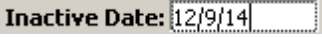


Changes and additions to site demographics are made in the Site Maintenance screen. When changes are made to existing site information, the old information is not retained.

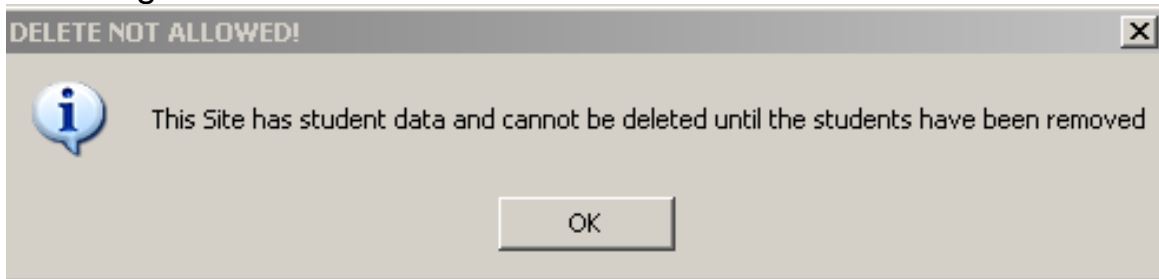
1. Click the search icon .
2. Perform a search and return with the selected site.
3. Change the site name, address or other information.
4. Click the save icon .
5. Look at the Created/Modified Box. The modified box should have autofilled with your user ID and today's date.

	Created	Modified
Date:	1/20/2010	3/20/2014
User ID:	auriej	smatthews

Deleting or Inactivating a Site

In the Site Maintenance screen, you have the option of deleting a site that has no student data associated with it. The only situation in which it is appropriate to delete a site is when the site was added in error. For example, if two users inadvertently add the same site, one of the records can be deleted. For sites that close, the way the site may be removed from reporting is by adding an inactive date.

1. Double click on School Exclusion Client icon.
2. Click  and perform a search.
3. Click  to bring up the Site Maintenance screen.
4. To inactivate the site, add a date in the Inactive Date field.

5. To delete the site, first click on the name field (or any other field).
6. The  should now be active. Click  to delete the site.
7. If the site has students associated with the site, you will see this dialog box :

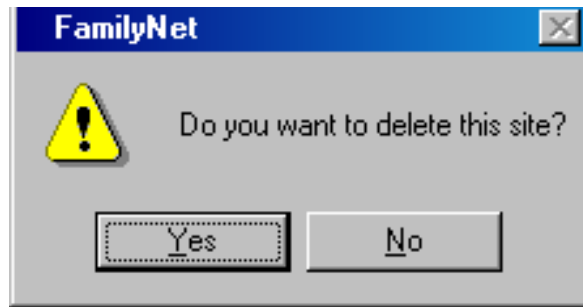


8. Click OK.

9. If the site does not have students associated with it, you will see this dialog box:

10. Click Yes.

11. Try to search site



again for the

12. You should see the No Site Found dialog box.



13. Click OK.

Chapter 3—Entering Primary Review Data

Objectives


- Enter Primary Review data for a site
- Identify errors in the Primary Review Data

Introduction

The Primary Tab is in the Site Maintenance screen, just under the demographic data. In general, when you open a site, the Primary Tab will be on top.

The Primary Tab allows you to enter the data reported by a site on their Primary Review Summary, Sections A and D. These data are used to calculate the County Status Report, so accuracy is crucial. If there are mathematical errors in the data entered, the system will display a lightning bolt on the tab and shade the relevant fields blue.

Accessing the Primary Tab

1. After double clicking on the School Exclusion Client icon, you will be in the Site Maintenance screen. The Primary tab generally will be open.
2. To access from any other tab, click on the Primary Tab 

The screenshot shows a 'Site Maintenance Screen' with the 'Primary' tab selected. The form is divided into several sections:

- Top Section:** Includes fields for Name, ID, Type, Age/Grade, Grades/Ages Served, Created, Modified, Area, Phone, Extn, Inactive Date, Date, Mailing Label Attn, and User ID. There are also checkboxes for educational levels: PRESCHOOL / CHILD CARE / HEAD START, KINDERGARTEN, 7TH GRADE, and FULL SCHOOL GRADES K-12.
- Address Section:** Includes Str#, Pre Dir, Str Name, Str Type, Post Dir, Zip, City, and State.
- Computer System Used:** A dropdown menu.
- School District:** A dropdown menu.
- New Site - Not Yet Reporting:** A checkbox.
- Contact Information:** Fields for Last Name and First Name for Primary Contact and Administrator, along with Email fields.
- Enrollment Statistics:** A grid of input fields for Total Enrollment, Children not to be counted, Adjusted Enrollment, Number Complete or Up To Date, Nonmedical Exemption, Medical Exemptions (Perm and Temp), Number Incomplete/Insufficient, and No Record. It also includes Created and Modified date and User ID fields.
- Summary Table:** A table with columns for Non-IRIS Issued, IRIS Issued, Total Issued, and Excluded. Rows include Incomplete / Insufficient, No Record, and Totals.

Site Maintenance Screen with Primary Tab on top

3. The following fields are in the Primary tab:

Total Enrollment: This is the total number of children reported as enrolled by a site.

Children not to be counted: This is the number of children who are not being counted because they are enrolled at another site that will be reporting them. This could also include drop in children who have not attended the facility 5 times or more.

Adjusted Enrollment: This is total enrollment minus the children not to be counted. If this number is incorrect when the record is saved, the three related fields will turn blue and a lightning bolt will appear on the Primary Tab.

Number Complete or Up-to-Date: This is the number of children who have received all of their vaccines or who will need a vaccine in the future but are current as of the review date.

Nonmedical Exemption: This is the number of children who are exempt from one or more vaccines because of nonmedical beliefs and who are up-to-date or complete on vaccines for which they do not have a documented nonmedical exemption.

Medical Exemptions-Perm: This is the number of children with a medical exemption that has been determined by the health department to be permanent. This category indicates that the child will never be able to receive the vaccine.

Medical Exemptions-Temp: This is the number of children with a medical exemption that is for a limited period of time and has an expiration date. A medical exemption that has not been reviewed by the local health department should be counted the temporary medical exemption category.

Number Incomplete/Insufficient: This is the number of children missing a vaccine dose or who have problems with their record. Also include in this category children who have a nonmedical exemption for some vaccines but are incomplete on others for which they do not have a documented nonmedical exemption.

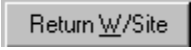
No Record: This is the number of children with no immunization record on file at the site.


Tip: These categories should add up to the adjusted enrollment. A child can only be counted in one category.

Incomplete/Insufficient and No Record Issued: These fields are to document the number of exclusion orders of each type issued for this site. These fields are necessary for the County Status Report. If you use the FamilyNet School Exclusion Module to generate all of your exclusion orders, these fields will be auto filled by the system. If you use another program to generate exclusion orders, enter the number of exclusion orders in the “Manually issued” field for each site.

Excluded: These fields are used to document the number of students in this site that were excluded by exclusion order type. These data are found in Section D of the Primary Review Summary Report. These fields are necessary for the County Status Report.

Entering Data into the Primary Tab

1. Begin by performing a site search for the site. Since sites will be carried over from one exclusion cycle to another, it is likely that the site already exists in the database.
2. Click .
3. Click on Total Enrollment. Enter number reported by the site, then hit Tab.
4. Enter the Children not to be Counted number reported by the site, then hit Tab.
5. Enter the Adjusted Enrollment number reported by the site, then hit Tab.
6. If the numbers reported by the site are mathematically incorrect, the fields will be shaded blue and a lightning bolt will appear on the Primary Tab. Sometimes you need to save the information before incorrect fields will turn blue.

Primary 	Followup	Notes	Contact
Total Enrollment:	<input type="text" value="15"/>		
Children not to be counted:	<input type="text" value="5"/>		
Adjusted Enrollment:	<input type="text" value="13"/>		



Incorrect

Primary	Followup	Notes	Contact
Total Enrollment:	<input type="text" value="15"/>		
Children not to be counted:	<input type="text" value="2"/>		
Adjusted Enrollment:	<input type="text" value="13"/>		


Correct

7. Tab to the Number Complete or Up-to-Date field. Enter the number reported by the site, then hit Tab.
8. Enter the Nonmedical Exemption number reported by the site, then hit Tab.
9. Enter the Permanent Medical Exemption number reported by the site, then hit Tab.
10. Enter the Temporary Medical Exemption number reported by the site, then hit tab.

11. Enter the Incomplete/Insufficient number reported by the site, then hit Tab.
12. Enter the No Record number reported by the site, then hit save.
13. All of the data entered for steps 7 through 12 (Complete/Up to Date through No Record) added must equal the adjusted enrollment. If they do not, when the record is saved the category fields will be shaded blue, the lightning bolt will be displayed on the Primary tab.

Primary 	Followup	Notes 	Contact
Total Enrollment:	<input type="text" value="26"/>	Number Complete or Up To Date:	<input type="text" value="24"/>
Children not to be counted:	<input type="text" value="0"/>	Religious Exemption:	<input type="text" value="2"/>
Adjusted Enrollment:	<input type="text" value="26"/>	Medical Exemptions: Perm	<input type="text" value="0"/> Temp <input type="text" value="0"/>
		Number Incomplete/Insufficient:	<input type="text" value="2"/>
		No Record:	<input type="text" value="0"/>

Incorrect

Primary	Followup	Notes 	Contact
Total Enrollment:	<input type="text" value="26"/>	Number Complete or Up To Date:	<input type="text" value="24"/>
Children not to be counted:	<input type="text" value="0"/>	Religious Exemption:	<input type="text" value="2"/>
Adjusted Enrollment:	<input type="text" value="26"/>	Medical Exemptions: Perm	<input type="text" value="0"/> Temp <input type="text" value="0"/>
		Number Incomplete/Insufficient:	<input type="text" value="0"/>
		No Record:	<input type="text" value="0"/>

Correct

14. If all of the exclusion orders for this site are generated in FamilyNet School Exclusion Module, the number of exclusion orders will auto fill in the "Computer Issued" fields. If some or all of the exclusion orders are generated from a different program or manually written, enter the number of Incomplete/Insufficient and No Record exclusion orders in the "Manually Issued" column.

	<u>Manually Issued</u>	<u>Computer Issued</u>	<u>Total Issued</u>		<u>Excluded</u>
<u>Incomplete / Insufficient</u>	0	8	8	<u>Incomplete/Insufficient</u>	0
<u>No Record</u>	0	1	1	<u>No Record</u>	0
<u>Totals</u>	0	9	9	<u>Totals</u>	0

15. Enter the number of children excluded from this site by type of exclusion order from Section D of the Primary Review Summary. Click save.
16. Data on the Primary Tab can be changed by entering a new number in the appropriate field and clicking save.

Tip: If the number for a field is zero, you do not have to type 0. Hit Tab and 0 will autofill and move to the next field.

Chapter 4—Entering Follow-Up Tab

Objectives

- Enter Follow-Up data reported by sites
- Identify errors in the Follow-Up data

Introduction

The Follow-Up Tab is in the Site Maintenance screen, to the right of the Primary Tab. The Follow-Up Tab allows you to enter the data reported by a site on their Primary Review Summary, Sections E through G. These data are used to calculate the County Status Report, so accuracy is crucial. If there are mathematical errors in the data entered, the system will display lightening bolt on the tab and shade the relevant fields blue.

Accessing the Follow-Up Tab

1. Click on Follow-Up Tab.

The screenshot shows a software interface with a tab labeled 'Followup' selected. Below the tab is a grid of data entry fields. The columns represent various immunization categories and counts, including Total Enroll, Not Count, Child Enroll, and various vaccine types (MMR, Meas, HEP, etc.). The rows represent different grade levels: PRESCHOOL / CHILD CARE / HEAD START, KINDERGARTEN, 7TH GRADE, and FULL SCHOOL GRADES K-12. The 'No Stdn'ts' column is highlighted in blue for the first three rows, indicating a data entry error.

- 2.

Follow-Up Tab

Filling in the Follow-Up Tab

1. Only the rows corresponding to the checked Grade Level boxes will be ready for data entry. All other rows will be grayed out.

Primary	Followup	Notes	Contact	Email:																													
	Total	Not	Child	Adj	DTaP	PO	VAR	MMR	Meas	HEP	# req	HEP	HIB	All	No	Med	NMed	NME	NME		NM	NM	NM	NM	NM	NM	NM	NM	NM	NM	NM	NM	
	Enroll	Count	< 18mc	Enroll	Tdap	LIO		(Dose 1)	(Dose 2)	B	HepA	A		Rec	Exmt	Exmt	Online	HCP		E	E	E	E	E	E	E	E	E	E	E	E		
PRESCHOOL / CHILD CARE / HEAD START	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	No Stdnts	<input type="checkbox"/>	0	0	0	0	0	0	0	0	0	0	0	0
KINDERGARTEN	26	0	0	26	24	23	23	25	25	25	0	23	23	0	0	0	0	0	0	No Stdnts	<input type="checkbox"/>	0	0	0	0	0	0	0	0	0	0	0	0
7TH GRADE	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	No Stdnts	<input type="checkbox"/>	0	0	0	0	0	0	0	0	0	0	0	0
FULL SCHOOL GRADES K-12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	No Stdnts	<input type="checkbox"/>	0	0	0	0	0	0	0	0	0	0	0	0

Correct

- If the site normally has children in one of these grades, but no students this year, check the no student box. For example, if school that usually has 7th graders but doesn't have anyone in 7th grade this year, check the No Students box in the 7th grade row.
- Complete the section listing the number of children who have a nonmedical exemption for each of the vaccines for preschool/daycare/Head Start and kindergarten students only.

Rel Ex DT	Rel Ex Pert	Rel Ex Polio	Rel Ex Meas	Rel Ex 1ump	Rel Ex Rubel	Rel Ex HIB	Rel Ex HepB	Rel Ex HepA	Rel Ex Var	Rel Ex ALL
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0

- Click save .

Chapter 5—Entering Notes and Contacts

Objectives: Notes

- Use the Checklist to track a site’s progress through the review process
- Use the Notes field to enter notes about contacts with a site.

Introduction

This section will describe how the features of the Notes tab can help you track where sites are in the review process.

The screenshot shows a software interface with four tabs: Primary, Followup, Notes (selected with a red checkmark), and Contact. The Notes tab is active and contains a text area with the text "This is a sample note. SDM 3/4/11". To the right of the text area are two columns: "Created" and "Modified", both containing the date "3/4/2011". Below these are two "User ID" fields, both containing "smatthews". To the right of the text area and date fields is a "Check List" section with the following items:

Created	Modified
3/4/2011	3/4/2011

User ID: smatthews smatthews

Check List

- PRIMARY REC'D
- PRIMARY CONTAINS ERRORS
- PRIMARY REVIEW COMPLETE
- EXCLUSION ORDERS ISSUED
- NO EXCLUSION ORDERS NEEDED
- FOLLOWUP REC'D
- FOLLOWUP CONTAINS ERRORS
- FOLLOWUP REPORT COMPLETE
- VALIDATION SURVEY REFERRAL

Notes Tab

1. Click the box next to the check list description to indicate steps of the review process that the site has completed. You can run reports in School Exclusion Reports based on the checked boxes.

2. Click the Validation Survey Referral box to refer the site for a validation survey site visit from the state Immunization Program.
3. Comments or documentation of contacts can be entered into the Notes section. Notes are retained from year to year. It is recommended that you enter a date for all notes. When a note is entered, a red checkmark appears on the Notes tab.

Objectives: Contacts

- Add a contact to a site
- Update the contact list
- Delete a site contact

Introduction


It can be helpful to have more than one set of contact information for a site, particularly if a site is large or has duties divided among several people. The Contact tab will allow you to track the names, titles, email addresses and phone numbers of several people working at the same site.

Contact Tab



The screenshot shows a software interface with a tabbed menu at the top containing 'Primary', 'Followup', 'Notes', and 'Contact'. The 'Contact' tab is selected. Below the menu is a table with the following columns: Last Name, First Name, Title, Email, Area, Phone, and Extn. The 'Area' and 'Phone' columns are currently empty, while the 'Phone' column contains a hyphen. A blue arrow button is visible on the left side of the table.

Entering Contacts

1. Click on the Contact Tab.
2. Click on the Last Name field, enter a name and hit tab.
3. Enter a First Name and hit tab.
4. Enter a Title and hit tab.
5. Enter an Email address and hit tab.
6. Enter an Area Code and hit Tab.
7. Enter a Phone Number and save.
8. Add an additional contact by clicking on the existing contact and clicking on the add button  in the toolbar.

Chapter 6—School Exclusion Student Information

Objectives

- Enter student data on the Student Information screen
- Search for a student
- Change student demographic information
- Delete a student



Introduction


One of the most beneficial components of the School Exclusion Module is the ability to electronically generate exclusion orders and to print them. This section will focus on searching for students, adding students and entering demographic data used to generate the exclusion order. The word student also refers to children in preschool, certified day care or Head Start.

Before each exclusion cycle, all student data will be cleared out in preparation for the new cycle. Therefore, you need to add all student demographic records each exclusion cycle.

Entering a New Student

Students are associated with the site that reported them. You will only be able to enter a student by first bringing up the site demographic information for that school or children's facility. You can do a client search before adding a new student if students have been entered for a site. If no information has been entered in for a site, it is not necessary to do a client search.

1. Double click on School Exclusion Client icon  to display the Site Maintenance screen.
2. Click on the  button to display the Site Search screen.

3. Perform a search, click on the site and return with it to the Site Maintenance screen.
4. Click on the Student Details button  on the toolbar.
5. The Student Information screen is displayed with the site name auto-filled.

Student Information Screen

6. Click on Student Last Name and begin entering the student demographic fields in the Student Information screen.

Tip: Yellow fields are mandatory.

ID: This is for a local or school student ID number, if used.

Date of Birth

Last Name

First Name

Middle Initial

Parent/Guardian Last Name

Parent/Guardian First Name

Address:

Str#: The street number is entered field. If the site has a PO Box, leave this field blank.

Pre Dir: The pre-direction is a drop down list for the street direction when it appears before the street name; e.g., NE Broadway.

Str Name: Enter the street name in this section. If the site uses a PO Box, enter it here: e.g., PO Box 142.

Str Type: The street type is a drop down list.

Post Dir: The post-direction is a drop down list for the street direction when it appears after the street name; e.g. Winter Street NE.

Apt: Enter an apartment number here. The number (or letter) will print at the end of the address sign; it will not say "apt" or "#" in front of it.

Zip: Enter the zip code in this field. The city and state will automatically fill in for some areas when the zip code is entered. A list of cities will appear when there is more than one city connected to a zip code, allowing you to select the correct choice.

City: If a city is entered instead of the zip code, the state and zip will automatically fill in. A list of cities, states and zip codes will appear if there is more than one possibility.

State: State will auto fill if either the zip code or city is entered into the system.

8. Bad Address Date: You can enter this information if an exclusion letter gets returned to you from the post office. This field is for county



use and is not required. Enter this date as MM/DD/YYYY.

Bad Address Date:

9. Excluded Date: You can enter this date if the student gets excluded from school or childcare. This field is for county use and is not required. Enter this date as MM/DD/YYYY. **Excluded Date:**

10. Created/Modified: Once a record is created and saved, the date and user ID of the user that created it will be automatically populated. The modified box will be updated each time a change is made to the Student Information screen and saved.



	<u>Created</u>	<u>Modified</u>
Date:	<input type="text"/>	<input type="text"/>
User ID:	<input type="text"/>	<input type="text"/>



11. Click save  on the toolbar.
12. Click on Student Last Name. The add button  on the toolbar will now be enabled. Click on the add button. A blank student information screen will now be available for data entry.

Searching for a Student

If students have already been entered for a site or if more than one person is working on a specific site, you may need to complete a search for a student before adding a student record.



1. Click on School Exclusion Client icon  to display the Site Maintenance screen.
2. Click on the  button to display the Site Search screen.
3. Perform a search, click on the site and return with it to the Site Maintenance screen.

4. Click on the Student Details button  on the toolbar.
5. The Student Information screen is displayed with the site name auto-filled.
 - Students are associated with the school or facility that reported them. You will only be able to find a student by first bringing up the site demographic information for that school or facility.
6. Click  to open the student search screen.

STUDENT SEARCH

Note: The % symbol acts as a multiple character wildcard

Student	
Student ID: <input type="text"/>	Date Of Birth: <input type="text"/>
Site: Critter Country	
Last Name: <input type="text"/>	First Name: <input type="text"/>
Parent/Guardian	
Last Name: <input type="text"/>	First Name: <input type="text"/>

Student ID	Last Name	First Name	DOB	Address

- Search criteria appear at the top of the tab. Information can be entered in any single field or all fields. The search results will narrow as more fields are filled.

- The results of the search will be displayed in the large white box in the lower part of the screen.
- % acts as a wildcard and can be used with a partial name or instead of a name.

The searchable fields are Student ID, Date of Birth, Last Name, First Name, Parent/Guardian Last Name and Parent/Guardian First Name. None of these fields are mandatory; however, at least one data element must be entered into a field for a search to take place. The more information that is entered into these fields, the more specific your search will be. For a new search, it is better to do a broad partial search to keep errors to a minimum.

The recommended ways to search for a student are:

- The first three letters of the student's last name;
- A student's date of birth;
- The first three letters of the parent/guardian last name; or,
- A wildcard symbol % in place of the student's last name.

7. Fields on the Student Search screen:

Student ID: This is an agency-entered ID used in counties that have their own student numbering system, or a place to document the student's school ID. Most counties do not use this field.

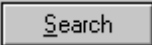
Date of Birth: Enter date as MM/DD/YYYY.

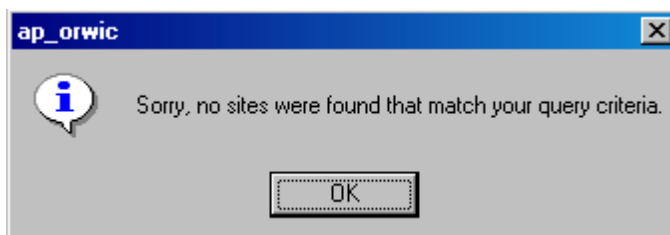
Last Name: If only one letter is entered into this field, all student last names that begin with that letter will be retrieved from the database. If a specific name is entered, only those students with that last name will be retrieved from the database. Entering % in this field will list all students at the site.

First Name: If only one letter is entered into this field, all student first names that begin with that letter will be retrieved from the database. If a specific name is entered, only those students with that first name will be retrieved from the database. Entering % in this field will list all students at the site.

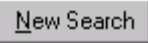
Parent/Guardian Last Name: If only one letter is entered into this field, all Parent/Guardian last names that begin with that letter will be retrieved from the database. If a specific name is entered, only those Parents/Guardians with that last name will be retrieved from the database. Entering % in this field will list students for whom a parent last name has been entered; if there is no parent last name entered, the student will not be listed in the search results.

Parent/Guardian First Name: If only one letter is entered into this field, all Parent/Guardian first names that begin with that letter will be retrieved from the database. If a specific name is entered, only those Parents/Guardians with that first name will be retrieved from the database. Entering % in this field will list students for whom a parent first name has been entered; if there is no parent first name entered, the student will not be listed in the search results.

8. Enter student information or % into at least one field.
9. Click  button, or press Enter.
 - The students found in the database matching your search criteria will be displayed alphabetically in the results box.
 - You may need to scroll down to view all students listed.
 - If there are no students that match your search criteria, you will see the following message:




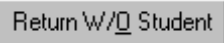
Click on OK to close the message.


- If the list of students is long and you want to narrow your search using additional information, or if no students were found and you want to expand your search with a more relaxed criteria, click on the  button to clear the screen and re-enter site information.

10. Returning to the Student Information screen

There are three ways to return to the Student Information screen from the Student Search screen.




Single click on the appropriate name and click on . This returns to the Student Information screen with student information.

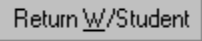
Click . This returns to the Student Information screen with no student information.

Click . This returns to a blank Student Information screen, ready for data entry.

Updating Student Demographics




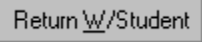

Since addresses change frequently, student information can be updated easily.

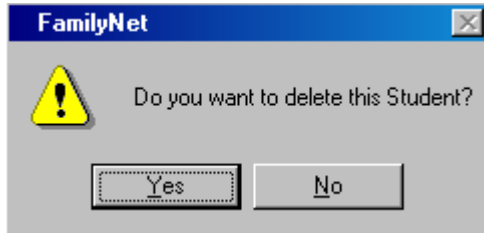
1. Double click on the School Exclusion Client icon.
2. Click the  icon to open the Site Search screen.
3. Perform a search for an existing site and return with the site.
4. Click  and then  to get to the Student Search screen.
5. Enter student information or % into at least one field. For example, type the first three letters of the last name of the student in the Last Name field and hit enter.
6. Click on the correct name to select it.

7. Click the  button or Enter. This displays the Student Information screen.
8. Change the student's address information. Click save.

Deleting a Student Record

Student records should only be deleted if they were entered in error, for example in the case of a duplicate, or if the school contacts you to let you know the student is now up to date and an exclusion order is not necessary.

1. Double click on the School Exclusion Client icon.
2. Click the  icon to open the Site Search screen.
3. Perform a search for an existing site and return with the site.
4. Click  and then  to get to the Student Search screen.
5. Enter student information or % into at least one field. For example, type the first three letters of the last name of the student in the Last Name field and hit enter.
6. Click on the correct name to select it.
7. Click the  button or Enter. This displays the Student Information screen.
8. Click in the last name field to highlight it.
9. Click the delete button  in the toolbar.
10. You should see a warning dialog box.



11. Click Yes.
12. You have successfully deleted the record.

Chapter 7—Exclusion Orders





Objectives

- Determine which exclusion order to complete (incomplete/insufficient or no record)
- Enter information to create no record and incomplete/insufficient exclusion orders
- Select which copy of the exclusion order to print

Introduction

One of the most beneficial components of the School Exclusion Module is the ability to electronically generate exclusion orders and to print them on a standard desktop printer. This section will focus on selecting the correct exclusion order type and completing necessary data.

Entering an Exclusion Order for No Record

1. Double click on the School Exclusion Client icon.
2. Click the  icon to open the Site Search screen.
3. Perform a search for an existing site and return with the site.
4. Click  and then  to get to the Student Search screen.
5. Perform a search for the correct student.
6. Click on the correct student name to select it.
7. Click on  or Enter.
8. Add or update student demographics, as necessary. Save.
9. Click the No Record Button.

IRIS - [School Exclusion Student Information]

File Edit Window Help

Site: Crittter Country ID: Date of Birth:

Student

Last Name: First Name: Middle Initial:

Parent/Guardian

Last Name: First Name:

Address

Str#: Pre Dir: Str Name: Str Type: Post Dir: Apt:




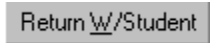
Zip: City: State:

No Record Record Incomplete / Insufficient

Bad Address Date: Date: Created Modified

Excluded Date: User ID:

Entering an Exclusion Order for Incomplete/Insufficient Information

1. Double click on School Exclusion Client icon.
2. Click the  icon to open the Site Search screen.
3. Perform a search for an existing site and return with the site.
4. Click  and then  to get to the Student Search screen.
5. Perform a search for the correct student.
6. Click on the correct student name to select it.
7. Click on  or Enter.
8. Add or update student demographics, as necessary. Save.
9. The Incomplete/Insufficient tab is now highlighted and ready for data entry.

Record Incomplete / Insufficient Excluded Date: User ID:

Notes Incomplete/Insufficient Information

Reset Following Information to Start

1. Following Information is needed: Date:

MMR before 1 year - 1 dose req.

A measles, mumps, & rubella (MMR) vaccine must be given at 12 months of age or older to count. The MMR vaccine on your child's record was given before 12 months of age so another dose is due now.

Vaccine

D/T/P
POLIO
MEASLES
MUMPS

2. Child has not received all immunizations:

DTP	TDAP	Polio	Varicella	Measles	Mumps	Rubella	Hep B	Hep A	Haemophilus
<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
<input type="checkbox"/> 2		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2			<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
<input type="checkbox"/> 3		<input type="checkbox"/> 3					<input type="checkbox"/> 3		<input type="checkbox"/> 3
<input type="checkbox"/> 4		<input type="checkbox"/> 4							<input type="checkbox"/> 4
<input type="checkbox"/> 5									<input type="checkbox"/> 4

11. If the student needs vaccines, click on the missing doses in the checkboxes. Only one dose in each series can be checked at a time. As soon as a dose in a series is selected, the series name will be highlighted in red. Save.

2. Child has not received all immunizations:

DTP	TDAP	Polio	Varicella	Measles	Mumps	Rubella	Hep B	Hep A	Haemophilus
<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
<input type="checkbox"/> 2		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input checked="" type="checkbox"/> 2			<input type="checkbox"/> 2	<input checked="" type="checkbox"/> 2	<input type="checkbox"/> 2
<input type="checkbox"/> 3		<input type="checkbox"/> 3					<input type="checkbox"/> 3		<input type="checkbox"/> 3
<input type="checkbox"/> 4		<input checked="" type="checkbox"/> 4							<input type="checkbox"/> 4
<input checked="" type="checkbox"/> 5									<input type="checkbox"/> 4

12. If a student has an insufficient record, choose a reason from the drop-down menu.

Notes Incomplete/Insufficient Information

1. Following Information is needed: Date:

MMR after 1 year

Dates out of Order

Duplicate Dates

MMR after 1 year

Measles before 1 year

Missing Dates

Test2

Vaccine Future Date

13. As soon as a reason is selected, the entire message will appear below the drop-down box exactly as it will print on the order.

Notes Incomplete/Insufficient Information

Reset Following Information to Start

1. Following Information is needed: **Date:**

Dates Missing

Date(s) for POLIO, (vaccine) vaccines are missing. Please provide dates for missing doses on the Certificate of Immunization Status form.

Vaccine

D/T/P

POLIO

MEASLES

MUMPS

14. For some messages, a vaccine and/or a date may be necessary. If the information is needed, the appropriate boxes will be highlighted in yellow. If necessary, you can select more than one vaccine by holding down the Ctrl key as you click on the needed vaccines.
15. Save.

Lesson: Student Notes Tab




Objectives

- Use the Notes tab to enter notes about a student.

Introduction

This section will describe how the Notes tab can help track information about a student, such as contacts to the school for a corrected address, or if you direct the school to send a copy of the order home with the student.

Notes

1. Double click on the School Exclusion Client icon.
2. Click the  icon to open the Site Search screen.
3. Perform a search for an existing site and return with the site.
4. Click  and then  to get to the Student Search screen.

5. Perform a search for the correct student or enter new student information.
6. Click on the correct student name to select it.
7. Click on .
8. Click on the Notes tab, enter information, and save.

Notes		Incomplete/Insufficient Information	
<u>Notes</u>		Created	Modified
		Date:	
		User ID:	

Notes Tab

Lesson: Printing from School Exclusion Client





Objectives

- Print an exclusion order
- Print a detailed site report
- Print an error report

Introduction

Several reports can be printed from School Exclusion Client, including exclusion orders, a detailed site report and an error report. It is useful to print these through School Exclusion Client if information for only one site or student is desired.

Printing an exclusion order

1. Double click on the School Exclusion Client icon.
2. Click the  icon to open the Site Search screen.
3. Perform a search for an existing site and return with the site.
4. Click  and then  to get to the Student Search screen.
5. Perform a search for the correct student.
6. Click on the correct student name to select it.
7. Click on .

Chapter 8—School Exclusion Reports

Objectives

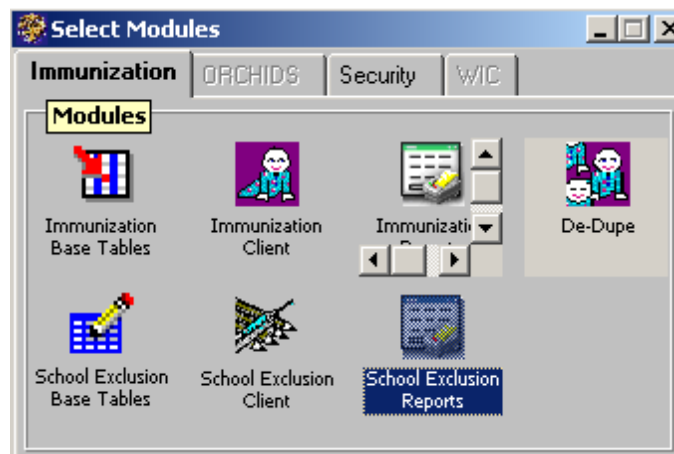
- Batch print exclusion orders
- Describe other available reports

Introduction

The reports module breaks down data entered into the School Exclusion Module into specialized reports.

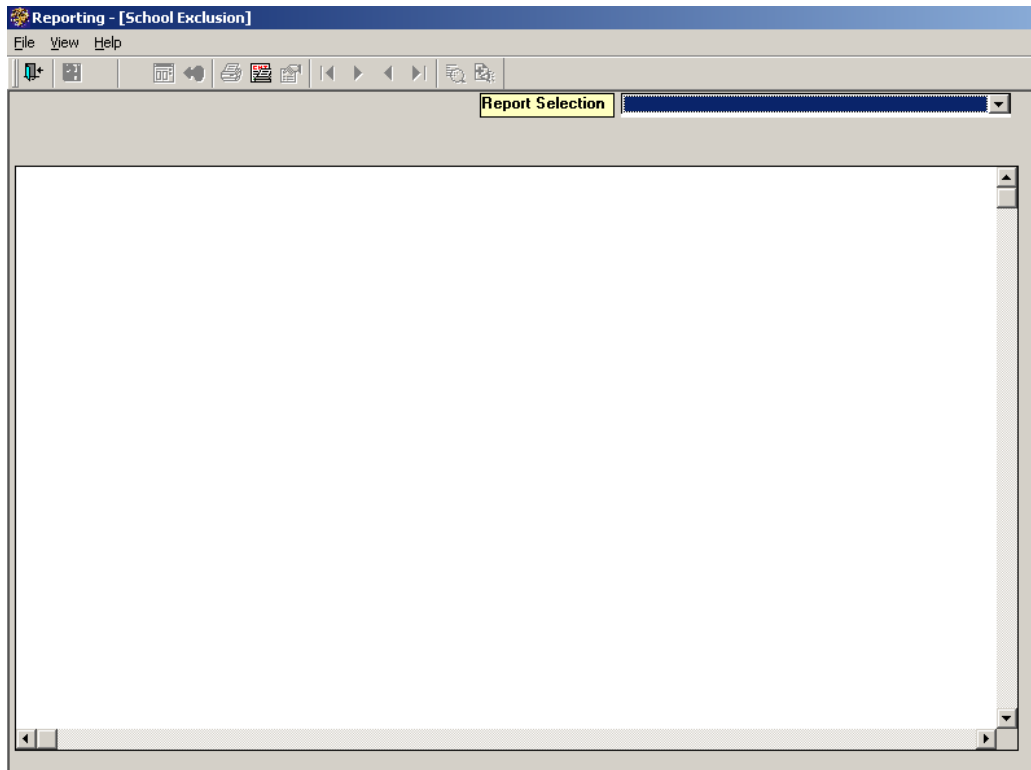
Accessing the Reports Module

1. Select the School Exclusion Reports icon.



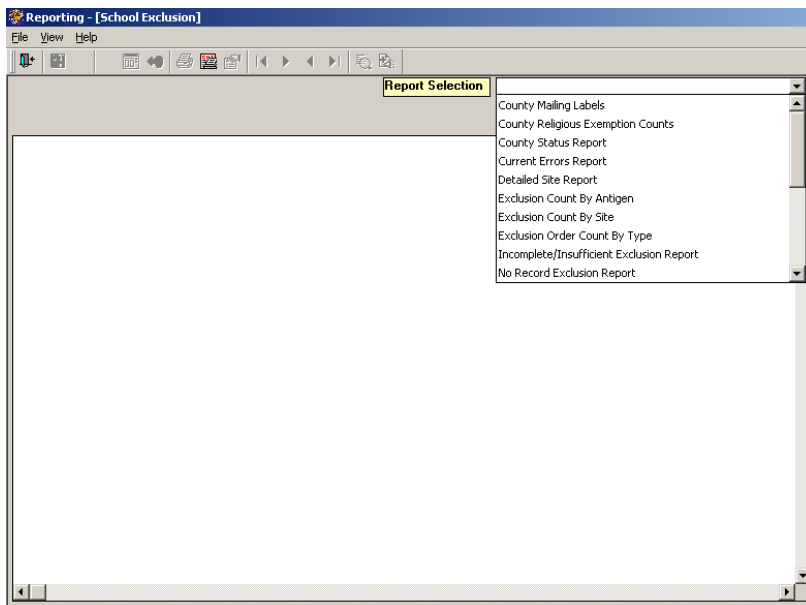
Select Modules Screen

2. A blank Reporting screen will appear.



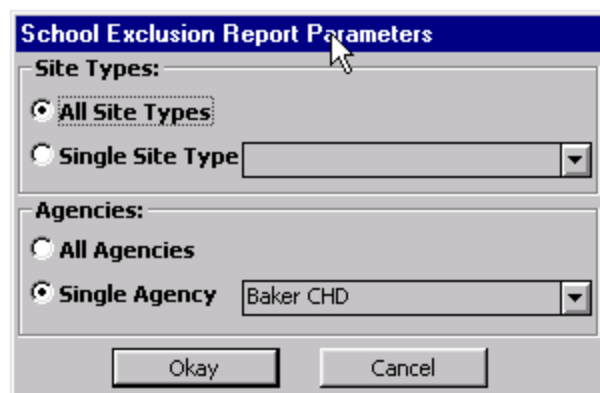
Blank Reporting Screen

3. Click on the drop down arrow in the Report Selection field. You will need to scroll down to see all the available reports.



Report Selection Drop Down Box

4. Select a report.
 - You may be asked to enter parameters.



Immunization Report Parameters Window

- You can choose whether to run the report on all the sites in your county, or you can select a single site type. For example, in Baker County, you could run a report on all sites or just one site type such as Head Start programs.
5. Click OK.
 6. The results of the report will be displayed.

Batch Printing Exclusion Letters

Exclusion Orders for Incomplete/Insufficient Information can be printed as a batch, as well as Exclusion Orders for No Record. Batches can be printed for the site, site type, or county.

1. Double click on School Exclusion Reports icon.
2. Choose Incomplete/Insufficient Report or No Record Report from the Report Selection drop down menu.
3. Select parameters such as a single site or single site type, if desired.
4. Click Ok
5. Choose the copy to print: Parent/Guardian, Site/Facility, or County Health Dept. This will print on the bottom of the exclusion order.

6. Click the print icon or File Print

Report Selection Incomplete/Insufficient Exclusion Report

Coop
Parent/Guardian Site/Facility County Health Dept.

7.

Reporting - [School Exclusion]
File View Help

Report Selection County Mailing Labels

ABC Child Care 123 S Main BAKER CITY OR, 97814	Betty's Kindergarten 2112 N Main St Baker City OR, 97814	Critter Country PO Box 982 BAKER CITY OR, 97814
Diane's Bake Preschool Levens DALLAS OR, 97338	New School Alabama PORTLAND OR, 97206	

Example of Mailing Labels

Report Selection: County Status Report

Baker CHD Immunization Status Report

SCHOOL	# In County	# Reporting	No Record	Total Enrollment	Not Counted	Adjusted Enrollment	Children < 18 mths	Religious Exemption	Med Exempt Temp/Perm	Complete / All	Complete / All %																																				
SCHOOL	15	0	0	0	0	0		0	0/0																																						
<table border="1"> <thead> <tr> <th>D/T</th><th>D/T %</th><th>Polio</th><th>Polio %</th><th>MMR</th><th>MMR %</th><th>HIB</th><th>HIB %</th><th>Measles 2</th><th>Meas 2 %</th><th>HEP B</th><th>HEP B %</th><th>VAR</th><th>VAR %</th><th>Hep A</th><th>Hep A %</th><th>TDAP</th><th>TDAP %</th> </tr> </thead> <tbody> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </tbody> </table>												D/T	D/T %	Polio	Polio %	MMR	MMR %	HIB	HIB %	Measles 2	Meas 2 %	HEP B	HEP B %	VAR	VAR %	Hep A	Hep A %	TDAP	TDAP %																		
D/T	D/T %	Polio	Polio %	MMR	MMR %	HIB	HIB %	Measles 2	Meas 2 %	HEP B	HEP B %	VAR	VAR %	Hep A	Hep A %	TDAP	TDAP %																														
PUBLIC SCHOOL	13	0	0	0	0	0		0	0/0																																						
PRIVATE SCHOOL	2	0	0	0	0	0		0	0/0																																						
KINDERGARTEN	9	0	0	0	0	0		0	0/0																																						
PRIVATE KINDERGARTEN	1	0	0	0	0	0		0	0/0																																						

Example of County Status Report

Reporting - [School Exclusion] | Report Selection: County Religious Exemption Counts

County Totals for Religious Exemptions

Agency: Columbia CHD

	No In	Numb	Adj	Religious	DT	Pertus	Polio	Meas	Mump	Rubel	HIB	Hep B	Hep A
	City	Report	Enroll	Exemption									
KINDERGARTEN	15	2	1	1	0	0	0	0	0	0	0	0	0
PRIVATE KINDERGARTEN	6	2	1	1	0	0	0	0	0	0	0	0	0
PUBLIC KINDERGARTEN	9	0	0	0	0	0	0	0	0	0	0	0	0
7TH GRADE	10	0	0	0	0	0	0	0	0	0	0	0	0
PRIVATE 7TH GRADE	3	0	0	0	0	0	0	0	0	0	0	0	0
PUBLIC 7TH GRADE	7	0	0	0	0	0	0	0	0	0	0	0	0
CHILDRENS FACILITIES	19	7	161	4	3	3	3	3	3	3	3	3	3

Ready | February 10, 2011 03:41 PM | Peggy Lou Hillman | Columbia CHD

Example of County Totals for Nonmedical Exemptions

Available Reports

Following is a list of the reports available and the purpose of each. Also included are the different parameter screens that help define each report.

County Mailing Labels: This report creates mailing labels that can be printed on a standard Avery 5160 size label. These can be printed for all sites or by site type.

County Status Report: This report generates the statistical report that is due to the Immunization Program in March, 12 days after the follow up Primary Review Summary is due to the county.

Current Errors Report: This report details mathematical errors that need to be corrected, by site.

Detailed Site Report: This report summarizes data entered for a specific site. It can be run for all sites or by site type. The report prints one site per page (some sites take two pages if they have many notes, contacts, or grades).

Exclusion Count by Antigen: This allows you to know how many children are in need of a specific vaccine at each site and for your county in total. This may be beneficial to use in estimating for clinic orders. The report can also show whether exclusion orders have been prepared for vaccines that are not required for a certain grade. For example, this report could show if an exclusion order for Hib was issued in error for a student in a middle school.

Exclusion Count by Site: This allows you to compare numbers with number of letters as well as identify those sites with abnormally high numbers of incomplete and no record exclusions.

Exclusion Count by Type: This allows you to compare with number of letters to ensure that all exclusion orders have been printed.

Incomplete/Insufficient Exclusion Report: This allows you to batch print Incomplete/Insufficient Exclusion Orders either for all sites or by selecting one site.

No Record Exclusion Report: This allows you to batch print No Record Exclusion Orders either for all sites or by selecting one site.

Sites Needing no Exclusion Orders: This allows you to focus energies on those sites requiring follow-up.

Sites That Have Not Printed Exclusion Orders: This allows you to quickly identify the printing that is still needed to be completed and when everything is finished. Identified by checking a box.

Sites With Exclusion Orders Issued: This allows you to know who to call to find out if students were excluded from school. Identified by checking a box.

Sites with Primary Report Received: This identifies the sites who have completed the initial part of the process and do not need a follow-up phone call. Identified by checking a box.

Sites with Primary Review Complete: This identifies the sites who have completed the entire process. Identified by checking a box.

State Statistical Report: This report generates the statistics needed to complete annual reporting of school/facility immunization rates for the Centers for Disease Control and Prevention.

State Statistics (Excel version): This is an Excel-exportable version of the State Statistical Report.

Validation Survey Referral Sites (current agency): This is the list of sites referred to the state for validation surveys from your county. Identified by checking a box.

Validation Survey Referral Sites: This is the list of all sites in the state referred to the state for validation surveys. Identified by checking a box.

Chapter 9—Security: Assigning and Maintaining User IDs and Passwords

Objectives

- Assign and maintain security roles for each user.
- Reset or change passwords assigned to users.
- Format user IDs to an identified standard.
- Assign staff a security role.

Introduction

Maintaining the security and confidentiality of information stored in FamilyNet is critical. One way to do this is by assigning unique user IDs and passwords, with appropriate security roles to all staff using IRIS. These roles have specific access rights associated to them. As you are logged in as the Local Agency, you will only see roles that are available for local users.

You can create a new user, remove a user and edit the information of an existing user, including their password. The user ID is the “name” you use to log in to IRIS. Your IRIS Special User will assign this ID. The IRIS Special User will also assign your initial password. You can then change the password to a unique word or combination of letters and numbers that only you and the system administrator will know. Do not share passwords with other staff. If additional logins are needed, call your IRIS Special User.

The “Roles” are a set of functions routinely performed by a group of specific users. IRIS allows the special user to assign appropriate security roles based on staff functions in the local agency. You can assign a user to one or more roles and/or remove a user from assigned roles. If a user is assigned more than one role, the role with the higher security access will take precedence over all other roles.