



Managing Clients

In this chapter:

- Finding Clients
- Use of Pick Lists in GRITS
- Editing/Entering Client Information
- Saving Client Information
- Deduplication of Clients
- Opting-Out/Opting-In Clients

Because GRITS receives birth record downloads, you should attempt to find a client in GRITS before entering him or her as a new client. However, GRITS will attempt to deduplicate (compare entered information against information saved to the registry for duplicate clients) client records prior to saving the information on the Enter New Client screen.

Finding Clients

When searching for an existing client in GRITS, more information is not always better. By entering too much information about a client (mother's maiden name, social security number, phone number, birth date, etc.) you will increase your entry time and decrease the odds of finding the client due to typing and interpretation errors. We recommend that you supply four characters of the client's last name and three characters of the first name only, unless the client's name is very common, in which case supplying a complete name, birth date, or mother's maiden name will help narrow the search.

1. Click on Manage Client under the Clients section of the menu panel.
2. In the Client Search Criteria box, you have several options for finding your client.

Client Search Criteria

Last Name	<input type="text"/>	Gender	<input type="radio"/> M <input type="radio"/> F <input type="radio"/> N/A	<input type="button" value="Find"/>
First Name	<input type="text"/>	SSN	<input type="text"/> - <input type="text"/> - <input type="text"/>	
Mother's Maiden Last	<input type="text"/>	Phone	<input type="text"/> - <input type="text"/> - <input type="text"/>	
Mother's First Name	<input type="text"/>	Chart #	<input type="text"/>	
Birth Date	<input type="text"/>	GRITS ID	<input type="text"/>	

- **Last Name:** Entering the first three letters of the client's last name, along with the first two letters of the first name, will initiate a search of all clients matching those letters. Entering fewer than three letters in the last name field will result in an exact name search; for example, entering the letters "Li" will produce only last names of "Li." If the client's name is common, typing in the full name will narrow the search.
- **First Name:** Entering the first two letters of the client's first name, along with the first three letters of the last name, will initiate a search of all clients matching those letters. If the client's name is common, typing in the full name will narrow the search.
- **Mother's Maiden Last:** Entering the mother's maiden last name, in combination with the data entered in the above two fields, will narrow a search for a client with a common name. Alternately,



Manage Client vs. Manage Immunizations

Manage Client and Manage Immunizations are the same query; in other words, they both utilize the client search function. The difference is that the Manage Client query will display the Manage Client screen, which consists of the client's demographic information, responsible person(s), etc., while the Manage Immunizations query will display the client's Immunization History screen.

you may find all clients associated with a mother by entering only the mother's first name and maiden last name.

- **Mother's First Name:** Entering the mother's first name, in combination with the data entered in the above three fields, will narrow a search for a client with a common last name. Alternately, you may find all clients associated with a mother by entering only the mother's maiden first and last names.
- **Birth Date:** Entering the client's birth date in conjunction with his or her first and last name will narrow a search for a common name. Otherwise, it is not necessary to enter a date in this field.
- **Gender:** Indicating the gender of the client will narrow a search for a common name, especially if the first name is androgynous.
- **SSN:** Entering the Social Security number (SSN) only will produce a single name match. Note: To find a client using his or her social security number, the number must have been entered previously for the client.
- **Phone:** Entering the client's phone number only will produce a single name match. However, this method is not recommended, as a phone number may not be entered for a client and phone numbers may change over time.
- **Chart #:** Entering the client's chart number only will produce a single name match. Note: To find a client using this method, the chart number must have been entered previously for the client.

3. Press **Find**.

4. If multiple records are found matching the information you entered, a table listing up to 75 matches with detailed information on each will be shown below the Find Client Information box. To choose a client from this list, click on the client's last name, underlined and in blue.

Possible Matches: 2

Last Name	First Name	Birth Date	Chart #	Mother's Maiden First	Mother's Maiden Last	Gender	Telephone
<u>DOE</u>	JOHN	08/01/2008				M	
<u>DOE</u>	JOHN	09/25/2008		SALLY	SMITH	M	

5. If only one client matches your search, the Manage Client screen for that individual will display automatically.
6. If no clients match your search, recheck the information you entered for accuracy. If you suspect the client has not been entered into GRITS, proceed to "Entering New Clients."

Use of Pick Lists in GRITS

When entering information on new clients or editing client information, you will use pick lists for many fields. GRITS uses pick lists — fields that contain a list of options from which you may choose — rather than free text fields for certain input data. The advantages of pick lists over free text fields include:

- Ease of use. Pick lists allow users to quickly fill in a data field without typing in the information.
- Health Level 7 (HL7) compliant. HL7 is a method of categorizing data so that it is uniform across all health reporting systems. This standardization allows providers using different systems to transfer data easily.
- Uniformity of entered data. By choosing information from a pick list, users do not risk entering conflicting information that could decrease the accuracy of GRITS reports. For example, one user using a free text field might enter a county name using an abbreviation, while another user might spell out the entire name.
- Confidentiality. By using standard pick lists, GRITS avoids confidentiality issues associated with the typing of free text that could be construed as medical record information.

Editing/Entering Client Information

The Manage Client screen allows you to update or change specific, non-immunization information relating to any client in GRITS. The Enter New Client screen, accessed by clicking this option on the menu panel, allows you to input this information for a client new to GRITS. The Manage Client and Enter New Client screens are divided into four parts: personal information header, client information tab, responsible person(s) tab, and client comment(s) tab.

Personal Information Header

The Personal Information section at the top of the Manage Client/Enter New Client screens contains client-specific information fields used primarily to distinguish among clients when doing client searches. All labels shown in a blue font indicate required fields.

Personal Information		Save
Last Name	HANCOCK	Immunize
First Name	JOHN	Edit Next
Middle Name		Reports
Mother's Maiden Last	SMITH	Data Exchange
Mother's First Name	JANE	Cancel
SSN		
Gender	<input checked="" type="radio"/> M <input type="radio"/> F <input type="radio"/> Unknown	
Birth Date	08/12/2003	
County	Gwinnett	
Last Notice		

Last Updated by: GA Help Desk on 02/27/2006

1. Last Name: Required field.
2. First name: Required field.
3. Middle name: Optional field.
4. Mother's Maiden Last: Required field. GRITS will allow you to save the record without this field completed; however, it will request you gather this information for future deduplication.
5. Mother's First Name: Required field. GRITS will allow you to save the record without this field completed; however, it will request you gather this information for future deduplication.
6. SSN: The SSN field is optional. If the field is blank, a SSN may be entered. Once the SSN is entered and saved, however, a provider cannot change it. In addition, it will not show on the Manage Client screen (it will say "On File") and will not appear on any reports. The SSN will be used for parental access to the system. *As the SSN cannot be easily changed once it is entered, enter this information very carefully.*
7. Gender: Click the appropriate radio button to choose male or female. This field is optional.
8. Birth Date: This is a required field. Fill in the field using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. Then choose a month and year from the pick lists at the top and choose a day by clicking on the appropriate calendar day. Press **OK**. Children entered by the Georgia Vital Records program do not have editable birth dates. The parent/guardian must contact the Georgia Vital Records program in the event an incorrect birth date is located. Contact the GRITS Help Desk to obtain the Vital Records phone number.
9. County: This optional field will be used by public organizations that are responsible for all clients within the county.
10. Last Notice: This field shows the last date that a recall/reminder notice was created for the client.
11. Updating organization: Below the Personal Information Header, the name of the organization that last updated the client's information displays in bold, along with the date the update was entered.



Generation of reminder and recall notices

Reminder and recall notices are generated for every responsible person associated with a client, given that the following conditions are met:

- The client's status is not set to "Inactive" or "Permanently Inactive-Deceased" on the Client Information tab.
- The "Allow Reminder and Recall Contact? Indicator" on the Client Information tab is set to "Yes."
- The responsible person's "Notices?" indicator on the Responsible Person(s) tab is checked. The responsible person(s) checked for notices has sufficient name and address information listed in the Responsible Person(s) tab.

Available buttons

There are several ways to save information on the Manage Client/Enter New Client screens:

- Save:** When pressed, the **Save** button at the top of the screen will save all information fields within the Personal Information Header, Client Information Tab, Responsible Person(s) Tab, and Client Comment(s) Tab to the GRITS database. Once the client data is saved, the message “Client Updated” will appear at the top of the Personal Information Header.
- Immunize:** As with the **Save** button, the **Immunize** button will save all information fields. Once the information is saved, the client’s Immunization History screen will display.
- Edit/Add Next:** As with the **Save** button, the **Edit Next** and **Add Next** buttons will save all information fields. Once information is saved under the Edit Next function, the Client Search Criteria screen will display.
- Reports:** As with the **Save** button, the **Reports** button will save all information fields. Once the information is saved, the Reports Available for Client screen will display, so that a report may be generated for the client. Refer to the Reports and Forms chapter of this manual for more information on reports.
- Data Exchange** The Date Exchange button displays a pop-up window titled: “Client/Data Exchange Information.” The pop-up window displays data exchange jobs that inserted or updated the selected client. Information for this window is not available prior to GRITS Release V5.5.0 March, 2006.
- Cancel:** When pressed, the button clears all entered information and does not save it to GRITS. The Find Client or Enter New Client screen is displayed.

Priority Groups Section

The Priority Groups section is used to collect Public Health data during a pandemic response event or preparedness exercise (such as the response event to a Pandemic Influenza outbreak.) If your organization is selected for an event, and the event is ongoing, then the Priority Group section will be displayed on the Edit/Enter New Client screen for you to select the appropriate priority group category for a client obtained through candidate screening.

Priority Groups			
Event Description	Begin Date	End Date	Priority Group
2008 Test Event	08/01/2008		Pick a Priority Group

Priority Group Assignment: *Pick a Priority Group*

1. Effective priority group categories are available in the pick list displayed. The Priority Group Value (Code) is displayed in the pick list. When selected, a full description of the selected priority group will be listed below the event description.

Client Information Tab

The Client Information tab gives additional information about the client, such as insurance carrier, primary care physician, chart number, etc. Only the Tracking Schedule and Funding Programs/Eligibilities (insurance/medical assistance information) and Eligibility Date fields under this tab are required.

1. Chart #: You may type in your organization's chart number for the client. A client may have numerous chart numbers associated with him or her; each number is organization dependent.
2. Ethnicity: Choose the client's ethnic background from the pick list provided.
3. Race: Choose the client's race from the pick list provided.
4. Provider (PCP): Fill in the client's primary care physician (PCP) or health care organization from the pick list, if provided. This information is used only for reporting.

Client Information	Responsible Person(s)	Client Comment(s)
Chart # <input type="text" value="100-225"/>		Tracking Schedule <input type="text" value="CDC/ACIP"/>
Ethnicity <input type="text" value="Not Hispanic or Latino"/>		Status <input type="text" value="Inactive"/>
Race <input type="text" value="Black or African-American"/>		Allow Sharing of Immunization Data? <input type="text" value="Yes"/>
Provider-PCP <input type="text" value="Doe, Jonathan"/>		Allow Reminder and Recall Contact? <input type="text" value="Yes"/>
School <input type="text" value="Peach Street Elementary"/>		
Eligibility List		Selected Eligibilities
MEDICAID PEACHCARE NATIVE AMERICAN/ALASKAN NATIVE	<input type="button" value="Add >"/> <input type="button" value="< Remove"/>	INSURED, VACCINES COVERED
Eligibility Date <input type="text" value="08/12/2003"/>		
Insurance Providers		Selected Providers
STATE HEALTH STATE MERIT WVAUSAU	<input type="button" value="Add >"/> <input type="button" value="< Remove"/>	UNITED HEALTHCARE OF GEORGIA, INC



You cannot enter a new immunization for a client that has 'Elig Not Determined/Unknown' selected as the client Funding Program/Eligibilities. You must select a funding program from the pick list.

5. School: Fill in the client's school from the pick list, if provided. This information is used only for reporting.
6. Tracking Schedule: Choose the immunization tracking schedule that is being used for this client from the pick list. This required field defaults to the Center for Disease Control and Prevention/

Advisory Committee on Immunization Practices (CDC/ACIP) schedule.

7. Status: Choose Active from the pick list if you want this client to be associated with your organization, meaning he or she is receiving services from you. When you specify a client as Inactive, you make him or her inactive for your organization only. This information affects recall and reminder notices and Clinic Assessment Software Application (CASA) reporting. Choosing Permanently Inactive — Deceased will inactivate the client for all organizations using GRITS. Choose this option only if you know the client to be deceased.
8. Allow Sharing of Immunization Data?: Parents or responsible persons may choose not to share their immunization information. If you choose No from the pick list, the record will be accessible only by your organization. Other organizations trying to access the record will receive a message referring them to you for further client information.
9. Allow Reminder and Recall Contact?: By choosing Yes from the pick list, you are allowing reminder/recall notices to be sent to this client's responsible person(s). If the parent chooses not to have reminder/recall notices sent, choose No from the pick list.
10. Funding Programs/Eligibilities: This is a required field that gives information on the client's eligibility to receive publicly funded vaccines. To select an eligibility type/funding program, highlight the appropriate funding source in the box at the left by clicking on it. Then press **Add**. Multiple funding programs/eligibilities may be selected.
11. Eligibility Date: This is a required field that gives the date the client's eligibility was effective. This field is used during the date exchange process to determine if the client's eligibility should be updated due to more current incoming eligibility data.
11. Insurance Providers: To select an insurance provider from the list at left, highlight the provider by clicking on it. Then press **Add**. Multiple insurance providers may be selected.

Responsible Person(s) Tab

The Responsible Person(s) tab allows you to identify client contact information and the persons to whom you may send reminder/recall notices. The only required field under this tab is the Relation field. However, if you want notices sent to a responsible person, you will need to fill in the person's first and last name and full address, and check the Notices box.

1. Click on the Responsible Person(s) tab.

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

Responsible Person Listing

Select	Last Name	First Name	Relationship	City	Notices
<input checked="" type="radio"/>	HANCOCK	JANE	Mother	Anytown	Yes
<input type="radio"/>	HANCOCK	JOHN	Father		No

Details for Responsible Person: JANE HANCOCK

Last Name: Street Address:

First Name: Other Address:

Middle Name: Mailing Address:

Relation: City:

Telephone: - - State: Zip: +4

Extension: Notices? Email:



Mailing Address

The responsible person's address is displayed as the client's address on screens and client reports.

- If there is an address entered in the mailing address, it will be displayed instead of the street address.
- If there is more than one responsible person for a client, the relationship code is used to determine whose address to use.

- To edit an existing responsible person, do the following:
 - Click on the Select radio button next to the name of the person you wish to edit.
 - Change or add information for the fields listed.
 - Press **Next**.
- To enter a new responsible person, fill in the following information:
 - Last Name: Enter the last name of the responsible person into this field.
 - First Name: Enter the first name of the responsible person into this field.
 - Middle Name: Enter the responsible person's middle name in this field.
 - Relation: Choose the relationship of the responsible person to the client from the pick list provided. This is a required field.
 - Telephone: Enter the responsible person's telephone number, including the area code, in this field.
 - Extension: Enter the responsible person's extension to the above telephone number, if any, into this field.
 - Street Address: Enter the responsible person's street address into this field.
 - Other Address: Enter the responsible person's additional address information, if any, into this field. For example, a suite number or apartment number could be entered here.
 - Mailing Address: Enter the responsible person's post office box, or mailing address, if different than the street address, into this field. If there is an address entered in this field, it will be

displayed as the client's address on the remaining client information tabs and client reports.

- City: Enter the responsible person's city into this field.
 - State: Choose the responsible person's state from the pick list provided.
 - ZIP: Enter the responsible person's ZIP code in this field.
 - +4: Enter the responsible person's +4 code in this field, if it is known.
 - Notices?: Check this box if you wish reminder/recall notices to be sent to this responsible person.
4. To enter a new responsible person and save the information you entered in the Responsible Person Listing or view the next responsible person's record, press **Next**.
 5. To clear existing information and enter a new responsible person, press **New**.
 6. To cancel unsaved information you entered, press **Cancel**.

Copying an existing record

1. Select the radio button next to the record you wish to copy on the Responsible Person Listing table.
2. Press **Copy**.
3. This information may now be edited and saved as another responsible person record.

Deleting an existing record

1. Select the radio button next to the record you wish to delete on the Responsible Person Listing table.
2. Press **Delete**.
3. Press **OK** in the confirmation box.

Client Comment(s) Tab

The Client Comment(s) tab allows you to enter comment and contraindication information for a client in pick list form.

1. Click on the Client Comment(s) tab.

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

Client Comment Listing 1-2 of 2

Select	Date	Client Comment
<input checked="" type="radio"/>	02/27/2004	Historical immunity: Varicella (chicken pox)
<input type="radio"/>	08/20/2004	Allergy to neomycin (anaphylactic) - MMR IPV VZU

Enter New Client Comment ...

Client Comment New

Applies-To Date Delete

Next
Cancel



Entering Medical Exemptions

Client comments are used to record medical exemptions, including allergies, immunodeficiencies, serologic immunity and history of Varicella. These medical exemptions are part of the criteria used to determine the expiration date on the 3231 report. Refer to the 3231 report section of the Manage Reports chapter for more information.

2. Enter the following information:
 - Choose the appropriate comment/contraindication from the Client Comment pick list.
 - Enter the date to which the comment refers in the Applies-To Date field. This field is required if a client comment has been selected. Fill in the field using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. Then choose a month and year from the pick lists at the top and choose a day by clicking on the appropriate calendar day. Press **OK**.
3. To enter the comment into the Client Comments Listing and enter a new comment or view the next comment, press **Next**.
4. To clear existing information and enter a new comment, press **New**.
5. To cancel unsaved information you entered, press **Cancel**.

Deleting an existing comment

1. Select the radio button next to the comment you wish to delete on the Client Comment Listing table.
2. Press **Delete**.
3. Press **OK** in the confirmation box.

Deduplicating Client Records

After you enter a new client and press one of the buttons that will save the data, GRITS initiates a process that ensures that the client information you entered does not duplicate a client that already exists in GRITS.

If after attempting to save a new client you receive a message box titled "Client Match Detected," you should read the message and

proceed carefully. A table below the message box contains one or more names of potential matches within GRITS. If one of these names matches your client, click on the client's last name to display his or her information. GRITS will identify matching clients even if the client has had a name change; therefore, if you do receive a list of potential matches, click on the link(s) to determine whether one of the links matches your client's record.

Client Match Detected

Based on the new client information that you entered, it is likely that your client is already registered in this system. You are strongly urged to consider using one of the clients listed below. To select a matching client, click on the Last Name of the client in the table shown below. If you still wish to override the system match and save the client as entered on the previous page, click the Override button below.

Please keep in mind that if you choose to ignore a legitimate client match, the immunizations stored for your client will not be contained in one client record. As a result, client immunization management will become unwieldy.

Possible Client Matches:1

Last Name	First Name	Birth Date	Chart #	Mother's Maiden First	Mother's Maiden Last	Gender	Telephone
HANCOCK	JOHN	08/12/2003	100-225	JANE	SMITH	M	555-5555

If after reviewing all the names given in the table you do not find a match for your client, press the button. A confirmation box will appear; press **OK**. Be aware that if you do override the listed matches and end up creating a duplicate record for a client, it will be difficult to manage the client's immunization and personal information and the registry will lose its accuracy and efficiency.



Recording new immunizations given to opt-out clients.

When the DHR Opt-Out a client all existing **new** immunizations are kept on the Opt-Out imm history page. Refer to the Opt-out immunization section of the Manage Immunization chapter for more details on viewing and recording new immunizations for opt-out clients.

Opting Out/Opting In

The Georgia Immunization Registry Law (OCGA sec. 31-12-3.1) as interpreted by the Rules and Regulations, grants requesters the option of having immunization records removed from the immunization registry by submitting a written opt-out request. The regulation further states that if an opt-out request is received prior to enrollment of a child in the registry, then no immunization record shall be created. If this request is received following enrollment of a child in the registry, the Department shall remove all immunization records for the child from the registry.

Printing Opt-Out and Opt-In Forms

For a client to opt out of the Immunization Registry, the client's parent or guardian must complete demographic section of the Opt-Out form, sign and date the form. Blank versions of Opt-Out form (Form-GRITS008) and Opt-In form (Form-GRITS007) are available in GRITS for downloading and printing.

To access the opt-out/opt-in forms, perform the following steps:

1. Click on opt-out/opt-in forms menu item to navigate to the Opt Out/In Forms screen.

Opt Out/In Forms

[Opt Out Form](#) Georgia Registry of Immunization Transactions and Services (GRITS) Opt Out of Registry Form

[Opt In Form](#) Georgia Registry of Immunization Transactions and Services (GRITS) Opt In to Registry Form

2. [Opt Out Form](#) and [Opt In Form](#) appear on the screen.
3. Click on either form link to display a .pdf file of the selected form. The form is displayed using Adobe Acrobat Reader®.
4. Adobe Acrobat Reader® functions such as Print and Save can be used with the opened document.
5. The demographic section includes blank lines for manual entry of the child's name, date of birth, gender, race, parent/guardian and relationship, telephone number and address.
6. The signature section includes blank lines for the parent/guardian signature and date.
7. The completed form is then mailed to the Department of Human Resources at the following address:

GRITS – OPT-OUT
DHR – DPH – Immunization Program
2 Peachtree Street NW
13th Floor, Room 476
Atlanta, GA 30303-3142

When the DHR receives the form, an authorized person will enter the client's opt-out status into GRITS. The Opt-Out form is maintained at the state office where it is available for review.

Immunizations for clients that have Opted-Out

When a client is opted-out of the registry, all immunization data is removed from the client record. However, new immunizations must be kept in GRITS for inventory reporting. New immunizations for these clients will now be displayed to the Opt-Out Immunization History screen, only the client's birth date will be kept from the client record for usage reporting. Historic immunizations are deleted from the registry.

Personal Information

****CLIENT OPTED-OUT****

A client record is maintained with enough demographic information to identify the client so that any attempt to associate immunizations to the client will be met by a message indicating that the client has opted out and cannot have their immunization history updated.

Opting In

If the parent or guardian requests the child be added back into GRITS, an Opt-In form must be completed and sent to the DHR –DPH – Immunization Program address:

GRITS – OPT-IN
DHR – DPH – Immunization Program
2 Peachtree Street NW
13th Floor, Room 476
Atlanta, GA 30303-3142

All immunization history for the client must be entered again by the provider organization. Immunizations should be entered as historical.