



# UNDERSTANDING FACILITY OWNERSHIP AND PATIENT STATUS

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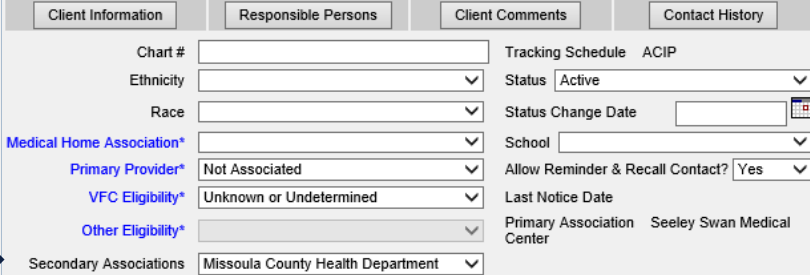
MONTANA IMMUNIZATION PROGRAM  
LAST REVISED: 3/2020

# OLD IMMTRAX: FACILITY OWNERSHIP AND PATIENT STATUS

The “old” imMTrax allowed a single patient record to have multiple connections to facilities throughout Montana. These connections were established through use of the Medical Home Association field (Primary or Secondary Associations).

All facilities listed as a Primary or Secondary Medical Home Association were essentially “facility owners” of that patient. Data or reports generated out of imMTrax considered the patient to be a part of each facility’s active patient population, and would include them in the output (such as immunization coverage assessments).

NOTE: Facilities that had a Medical Home Association of Mass Immunization, WIC, or School (non-SBHC) were not considered “facility owners” in the old imMTrax, but may be assigned as the facility owner in the new imMTrax.



The screenshot displays a patient record form with the following fields and values:

Client Information	Responsible Persons	Client Comments	Contact History
Chart #		Tracking Schedule	ACIP
Ethnicity		Status	Active
Race		Status Change Date	
Medical Home Association*		School	
Primary Provider*	Not Associated	Allow Reminder & Recall Contact?	Yes
VFC Eligibility*	Unknown or Undetermined	Last Notice Date	
Other Eligibility*		Primary Association	Seeley Swan Medical Center
Secondary Associations	Missoula County Health Department		

Two blue arrows point to the 'Primary Association' and 'Secondary Associations' fields, highlighting that the patient is associated with two different facilities.

In the above example, the patient record has two “facility owners”.

# OLD IMMTRAX: FACILITY OWNERSHIP AND PATIENT STATUS

**MOGE Patient Status:** A facility that was listed as a Primary or Secondary Medical Home Association could manually update the old imMTrax with a status of “Inactive – Moved or Gone Elsewhere”. Upon saving this change, the Medical Home Association was removed and replaced with “Not Associated”.

Once a facility was listed as “Not Associated”, they would no longer have that patient as part of their imMTrax population. The patient would stop being included in certain reports (immunization coverage, reminder/recall, etc.)

**Deceased Patient Status:** A patient record updated to reflect a status of “Permanently Inactive- Deceased” would immediately result in all Medical Home Associations being removed (Not Associated) upon saving the patient record.

The screenshot displays a patient record form with several tabs: Client Information, Responsible Persons, Client Comments, and Contact History. The Client Information tab is active. The form includes fields for Chart #, Ethnicity, Race, Medical Home Association\*, Primary Provider\*, VFC Eligibility\*, Other Eligibility\*, and Secondary Associations. The Status dropdown menu is open, showing options: Active, Inactive - Moved or Gone Elsewhere, Inactive - Consent Denied, Inactive - Consent Undetermined, and Permanently Inactive - Deceased. The Primary Association is listed as Seeley Swan Medical Center.

Field	Value
Chart #	
Ethnicity	
Race	
Medical Home Association*	
Primary Provider*	Not Associated
VFC Eligibility*	Unknown or Undetermined
Other Eligibility*	
Secondary Associations	Missoula County Health Department
Tracking Schedule	ACIP
Status	Active
Status	Inactive - Moved or Gone Elsewhere
Status	Inactive - Consent Denied
Status	Inactive - Consent Undetermined
Status	Permanently Inactive - Deceased
School	
Allow Reminder & Recall Contact?	Yes
Last Notice Date	
Primary Association	Seeley Swan Medical Center

## **NEW** IMMTRAX: FACILITY OWNERSHIP AND PATIENT STATUS

**The “new” imMTrax only allows ONE facility owner a time.**

**Facility Ownership:** Data moved from the old imMTrax to the new imMTrax must conform to the system requirement that only one facility may own a patient record at one time. Once the transition to the new imMTrax is complete, all patient records will be subject to that requirement and ownership will update over time as new data is received.

No perfect process to select just a single owner from our previous system existed and there are some limitations in assigning the best owner. However- all efforts were made to establish the best logic possible in determining a single facility owner for the new system.

## **NEW** IMMTRAX: FACILITY OWNERSHIP AND PATIENT STATUS

**The “new” imMTrax only allows ONE facility owner a time!**

**Q: How was the single facility owner for migrated data chosen?**

A: In most cases, facility owner will be set to the eligible\* facility that reported the last administered immunization (non-historical).

If such a facility is not available in the patient record, facility owner is determined by looking to available Primary Medical Home Association and then available Secondary Medical Home Associations to make the best decision possible.

\*Certain facilities are set up as NOT eligible to be a facility owner. These include hospitals/ERs, pharmacies, schools (non-SBHC), etc.

# **NEW** IMMTRAX: FACILITY OWNERSHIP AND PATIENT STATUS

**The “new” imMTrax only allows ONE facility owner a time!**

**Q: What if no eligible\* facility owner exists?**

A: If no eligible\* facility owner exists, the facility ownership may be null and the patient will be owned at the state and county level. An example would be a patient record that contains only a single immunization given and reported by a pharmacy. If the (sole) eligible facility previously designated that patient as MOGE or otherwise Not Associated, they may still display as the facility owner. However, they will have an Organization Level of “INACTIVE”. Continue for more information about Organization Level.

\*Certain facilities are set up as NOT eligible to be a facility owner. These include hospitals/ERs, pharmacies, schools (non-SBHC), etc.

# **NEW** IMMTRAX: FACILITY OWNERSHIP AND PATIENT STATUS

**The “new” imMTrax only allows ONE facility owner a time!**

## Patient Demographic Master View

### Record Info

SIIS Patient ID:	161422		
Organization (IRMS) Owner:	18505 - ABCD		
Facility Owner:	24361 - TEDDY BEAR CLINIC		
Entry Date:	01/07/2019 12:41:31 PM	Last Update:	01/07/2019 12:41:31 PM
Entered By:	TEST 36	Last Updated By:	TEST 36

# NEW IMMTRAX: FACILITY OWNERSHIP AND PATIENT STATUS

Organization Level a field containing three options in the new imMTrax that has two main purposes:

1. Updates and displays the relationship between the facility the user is logged in under:
  1. ACTIVE (current facility owner and active patient in facility's population)
  2. INACTIVE (not the current facility owner or this patient is inactive in facility's population)

-OR-
2. Displays the patient's vital status as DECEASED.

Organization Level:	Inactive ▼
	Active
	Inactive
	Deceased



# NEW IMMTRAX: FACILITY OWNERSHIP AND PATIENT STATUS

**Q: In a patient's demographics, what does it mean when Organization Level = Active?**

**A: Three things are always true when Organization Level = Active:**

1. The facility you are logged in under is the facility owner,
2. The patient is part of your active (imMTrax) patient population, and
3. The patient may be included in various reports and assessments (coverage reports, reminder/recall, etc)

Patient Demographic Master View			
Record Info			
SIIS Patient ID:	1306368		
Organization Owner:	15705 - MISSOULA CITY COUNTY HEALTH DEPARTMENT		
Facility Owner:	-		
Entry Date:	02/10/2020	Last Update:	03/02/2020
Entered By:	SARAH TEST CLIENTMT	Last Updated By:	SARAH KEPPEM
Patient Status			
State Level:	Active	Organization Level:	Active
County Level:	Active (Missoula)		

# **NEW** IMMTRAX: FACILITY OWNERSHIP AND PATIENT STATUS

**Q: In a patient's demographics, what does it mean when Organization Level = Inactive?**

**A: It depends! Here are the possibilities:**

1. If the facility you are logged in under is displayed as the facility owner, you are the most recent owner of the patient. However, this your former patient is NOT part of your active (imMTrax) population.
2. If the facility you logged in under is displayed as the facility owner, you are the most recent owner of the patient. However, the patient consent status = DENIED. Persons with a denied consent status may not be part of any facility's active population.
3. If the facility you logged in under does NOT display as the facility owner, you are not the current facility owner. If the facility owner is not your facility, patient status will always be "inactive".

Patient Status	
State Level:	Active
County Level:	Active (Missoula)
Organization Level:	Inactive

## **NEW** IMMTRAX: FACILITY OWNERSHIP AND PATIENT STATUS

**Q: Will facility ownership and patient status change automatically when another eligible facility inserts a newly administered immunization?**

A: An eligible facility that submits a newly administered immunization electronically (direct from their EHR) will become the new facility owner upon imMTrax receiving that data. The patient status for that facility will be ACTIVE.

An eligible facility that manually enters an immunization into imMTrax as newly administered (deducts from inventory) will become the new facility owner unless they manually check the box “Do Not Take Ownership When Adding Vaccinations” BEFORE proceeding to adding administered vaccines.

Do not take ownership when adding vaccinations.

Add Administered

Clear

Add Historicals

# NEW IMMTRAX: FACILITY OWNERSHIP AND PATIENT STATUS

**Q: Are there other ways facility ownership and patient status will be changed automatically?**

- A. One. If an eligible facility edits a patient's consent status (moving consent from NO or Undetermined to YES) the patient's ownership and active status will change to that facility unless the user manually changes the patient status back to inactive BEFORE SAVING.

**Change Organization Level back to INACTIVE to prevent taking ownership when updating consent status only.**

Patient Demographics Edit			
Status			
Patient Status:	<input type="text" value="Inactive"/>		
Patient			
Last Name:	<input type="text" value="TEST"/>	Race:	<input type="text" value="White"/>
First Name:	<input type="text" value="TEST"/>	Ethnicity:	<input type="text" value="--select--"/>
Middle Name:	<input type="text"/>	Language:	<input type="text" value="--select--"/>
Suffix:	<input type="text" value="--none--"/>	Medicaid #:	<input type="text"/>
Birth Date:	<input type="text" value="08/27/2008"/>	Birth Order:	<input type="text" value="Single Birth"/>
Birth File #:	<input type="text"/>	VFC Status:	<input type="text" value="--select--"/>
Sex:	<input type="text" value="FEMALE"/>	Reminder/Recall Publicity Code	<input type="text" value="--select--"/>
Mother Maiden Name:	<input type="text"/>		
Military:	<input type="checkbox"/>		
Comments:	<input type="text"/>		
Consented:	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Undetermined		

Patient Demographics Edit			
Status			
Patient Status:	<input type="text" value="Active"/>		
Patient			
Last Name:	<input type="text" value="TEST"/>	Race:	<input type="text" value="White"/>
First Name:	<input type="text" value="TEST"/>	Ethnicity:	<input type="text" value="--select--"/>
Middle Name:	<input type="text"/>	Language:	<input type="text" value="--select--"/>
Suffix:	<input type="text" value="--none--"/>	Medicaid #:	<input type="text"/>
Birth Date:	<input type="text" value="08/27/2008"/>	Birth Order:	<input type="text" value="Single Birth"/>
Birth File #:	<input type="text"/>	VFC Status:	<input type="text" value="--select--"/>
Sex:	<input type="text" value="FEMALE"/>	Reminder/Recall Publicity Code	<input type="text" value="--select--"/>
Mother Maiden Name:	<input type="text"/>		
Military:	<input type="checkbox"/>		
Comments:	<input type="text"/>		
Consented:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Undetermined		

# NEW IMMTRAX: FACILITY OWNERSHIP AND PATIENT STATUS

**Q: Can I manually change facility ownership to be my facility?**

A. Yes. Simply edit the patient's demographics to an Organization Level of Active. Upon saving, your facility will be the new facility owner and will have an Organization Level of Active.

Patient			
Click to compress all Sections below.			
State Level:	Active	Organization Level:	Active
County Level:	Active (Missoula)		
<b>Patient</b>			
<b>Last Name:</b>	TESTONE	Race:	White Black or African American Asian
<b>First Name:</b>	FEBRUARY2020	Ethnicity:	--select--
Middle Name:		Language:	--select--
Suffix:	--none--		
<b>Birth Date:</b>	02/01/2018	Medicaid #:	
Birth File #:		Birth Order:	Single Birth
<b>Sex:</b>	MALE	Nationality:	--select--
Mother Maiden Name:		Passport #:	
VFC Status:	VFC eligible- Medicaid	Visa #:	
Military:	<input type="checkbox"/>	Reminder/Recall Publicity Code	--select--
Comments:			
Consented:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Undetermined		
- Address			

# NEW IMMTRAX: FACILITY OWNERSHIP AND PATIENT STATUS

**Q: My facility is the current facility owner and has a Organization Level of active for a patient that has moved to another jurisdiction or practice. This patient is currently no longer part of our active patient population. Can I update imMTrax so this patient will no longer be part of our active imMTrax population?**

**A. Yes. Simply edit the patient's demographics to an Organizational of Inactive. Upon saving, your facility will still be the facility owner (most recent), but will have an Organizational Level of Inactive.**

Patient Demographics Edit			
<b>Status</b>			
Patient Status:	Active		
<b>Patient</b>			
<b>Last Name:</b>	TEST	Race:	White Black or African American Asian
<b>First Name:</b>	TEST	Ethnicity:	--select--
Middle Name:		Language:	--select--
Suffix:	--none--		
<b>Birth Date:</b>	08/27/2008	Medicaid #:	
Birth File #:		Birth Order:	Single Birth
<b>Sex:</b>	FEMALE	VFC Status:	--select--
Mother Maiden Name:		Reminder/Recall Publicity Code	--select--
Military:	<input type="checkbox"/>		
Comments:			
Consented:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Undetermined		



# QUESTIONS?



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