

View Only User Access in OSIIS

- 1) Access the **OSIIS Log In Page** at <https://osiis.health.ok.gov>
- 2) Log in to OSIIS using your username and password. If you have a temporary password, it is Oklahoma#1. Usernames are not case sensitive. Passwords are case sensitive.
- 3) You will find yourself on the OSIIS **Landing Page**. The strip across the top of the screen is the **OSIIS Toolbar**. You will use this to navigate the site.

Changing your Password

- 4) The first time you log into OSIIS you will be prompted to change your OSIIS Password.
 - a. You can also change your password from within the system at any time by selecting **User** from the **OSIIS Toolbar** and clicking on **Change Password**.
 - 5) Your username will be entered automatically. Enter your current password.

*If your **Current Password** is entered incorrectly, an error message will appear.
 - 6) Enter your temporary password.
 - 7) Enter your new password in the “**new password**” space. Re-enter the same new password in the “**confirm new password**” space. You may not reuse your password within 120-day period. A successful new password must contain:
 - At least eight (8) characters
 - At least one lower case letter
 - At least one capital letter
 - At least one number
 - At least one special character
- *The two entries of your new password must match, otherwise an error will appear.
- 8) Click the “**Change Password**” button. A pop up will appear to confirm that your password has been changed.
 - 9) Once selecting “**OK**,” you will be redirected to the **OSIIS Log In** Screen and will be able to log in with your new password.

*If you have forgotten your password, you may click on the blue hyperlink **Forgot Password** on the **OSIIS Log In Screen** and follow the prompts. You must have a valid email address associated with your OSIIS Username to utilize this function. If you do not have a valid email associated with your OSIIS Username, you may contact your OSIIS Site Administrator or the OSIIS Helpdesk.



Finding a Patient Record

10) Select the **Patient** drop-down from the **OSIIS Toolbar** and choose **Add New Patient**.

11) The **Search OSIIS Patients** window will appear.

12) You may search for a patient using one of the five search categories:

- **Demographics ID**
- **Last Name, First Name, Date of Birth**
- **Social Security Number**
- **Phone Number**
- **Street Address and Zip Code.**

***Search With Soundex** is an alternative means for searching for a patient. This method allows for you to use what the name sounds like to search for potential matches within OSIIS. To use Soundex, search for a patient using what their last name *sounds like* and their first name to narrow down potential results.

13) There are three possible outcomes from a patient search:

- a. Multiple returned results.
 - i. Review each individual for a potential match to the patient in question.
 - ii. You can view an individual's record from this screen by selected the **"Immunizations"** icon in the **Actions** column that corresponds with the individual.
- b. No results returned or the search was not narrow enough to produce less than 100 results.
 - i. You will see an error screen. Select **"New Search"** to perform a second search.
- c. Only one result is returned.
 - i. You will be taken directly to the **Patient Summary** screen for that individual.

14) From the **Summary** and the **Immunizations** screens, you may choose to print the patient's **Schedule** or **Shot Record**. To do so, select either option in the upper right hand corner of the **Patient** screen. A new tab will open allowing you to view or print.

Claiming a Patient Record

- 15) After searching for and successfully locating the patient’s record, you can “Own a Record” for an individual so that you may run a report to see who in your site is up to date on immunizations.
 - a. If you have a list of multiple returned results:
 - i. Review each individual for a potential match to the patient in question.
 - ii. Access the patient’s demographic information by selecting the “**Demographics**” icon in the **Actions** column that corresponds with the individual.
 - b. If you have only one result returned and are already on the **Immunizations** screen for the correct individual, either:
 - i. Select “**Demographics**” from the **Patient** drop-down;
 - ii. Or select the **Demographics** tab.
- 16) Once on the **Demographics** screen, scroll to **Site Status** and it will have your site in parentheses next to **Site Status**.
- 17) From the **Site Status** drop-down, select “**Active.**”
- 18) Scroll to the bottom of the screen and select the **Save Patient** button.
- 19) Once you have completed steps 15 – 18 for all the necessary patient records, select **Reports** from the **OSIIS Toolbar**.
- 20) From the list of **Available Reports**, select **Student Immunization Report**.
- 21) Your site will show up automatically in the **Report Parameters – Site** list. Select whether you would like to view the results in a PDF list or as an Excel Spreadsheet.
- 22) The report will open in a new window.

Change Sites

- 23) If you are a user with access to multiple sites, you can switch to a different site using the “**Change Site**” option in the **Admin** drop-down in the **OSIIS Toolbar**.
- 24) On the **Change Site** screen, select the site you wish to switch too from the **OSIIS Sites** drop-down list.
- 25) Select **Change Site**.

Manage Users

- 26) If you are the OSIIS Site Administrator for your site, you will be responsible for adding users and managing user access. To manage users in OSIIS, select **Admin** from the **OSIIS Toolbar** and click on **Manage Users** while you are logged in under the site for which you wish to manage users.

- 27) You may edit existing users by selecting the **Edit User** icon from the **Actions** column of the individual you wish to edit.
- 28) You may reset a user's password by clicking on the **Reset Password** icon in the **Actions** column for the user.
- 29) You may add a new **OSIIS User** by selecting the **Add User** button in the upper right hand corner of the **OSIIS Users** screen.
- a. All of the information on the **Add/Edit User** screen is required.
 - b. The default password for everyone when they first access OSIIS and when their password is reset is Oklahoma#1.

****For more detailed instructions please see the OSIIS User Manual****

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